

# **Facilities Connect: Basic Navigation**

PURPOSE: This job aid explains the general layout, basic features, and functionality within Facilities Connect.

## LOGGING IN TO FACILITIES CONNECT

Navigate to Facilities Connect through your Northwestern Single Sign-on (SSO).

#### Useful Tips:

- 1. The Facilities Connect Portal is the first page you'll see after logging in to the system; portal views will vary by role and your access to pages and system functions will be based on your role permissions.
- 2. Your browser's Back button functionality is not supported in Facilities Connect.
- 3. Many reports and menu options open as new windows. Training denotes a popup window with the following icon. 📭

### UNDERSTANDING THE MAIN PORTAL

Northwestern	ITIE	S CONN	ECT										Welcome, No	orthwestern Wildcat   Sig Company	n Out   About Project
Home Portfolio B Locations - Organizations - People	→   Ast	sets 👻   Portf	olio Set Up 👻									(	C	D	E
Frome > Portfolio												Open I	In New Window	Add to Bookmarks	My Bookmarks
G Reminders - Manage Requests	E My	Responsible Dep	artment Assignmen	ts and Assignee Detail	s							(		<ul> <li>Space Information</li> </ul>	
Notices	1	Organization Name	Organization Description	Organization Percent Allocated	ł	Building ID	Building	Floor	Space ID	Organization Allocated	Area	Room Area	Space Cla	Area by Space Class Parent	9
5 - Notifications		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00401	3	88.92	388.92	317 - Ope Space	Area of Building by Departme Assignee Space Report	ent 🗃
5 - My Active Requests		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00402	5	07.49	507.49	317 - Ope Space	Building Data 🕑 Building Occupant Contact Li	st 🗃
<ul> <li>● O - Requests Pending Approval III</li> <li>♥ Create Request III</li> </ul>		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00403	1	50.26	160.26	314 - Othe Office	Building Occupant List  CRIS Report	
Change Space  Ch		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00404	1	56.08	166.08	314 - Othe Office	CRIS Report - Lab Users 🕲 NSF Report 🔞	
Return Space 🔞		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00406	1	95.68	195.68	314 - Othe Office	Office Area Capacity 📴 Overall Total Campus Square	Footage 🛐
🖃 Last Visited 🔲 💌		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00406A		36.86	36.86	919 - Tolle Bath	Research Area	. 6
Type Name		5015000	FSM IT		100	8602	Abbott Hall	04	8602-04- 00406B		8.5	8.50	730 - Cent Storage	Space Report by Building	
Floor 01		5015000	FSM IT		100	8602	Abbott Rall	04	8602-04- 00407	1	95.25	195.25	313 - Administre	Zone Maintenance 💽	

- A Portal Tabs are listed across the top of the homepage screen.
- **B** Portal Tab Menus appear for the selected Portal Tab and feature dropdown menus of available options.
- C Open in a New Window enables viewing pages, forms or sections in a new window or browser.
- **D** Add To Bookmarks names and saves the currently displayed page as a bookmark.
- **E** My Bookmarks displays your saved bookmarks and folders.
- (F) Navigation Path helps you easily find your way by providing easy navigation to any page in the hierarchy of pages in the portal.
- **G** Expand or Collapse icons maximize or minimize a section within an application portal.
- (H) Action Items and Notifications on your home page are accessible in the "Notices" section.
- **I** Active Requests and Requests Pending Approval are accessible in the "Requests" section.
- J New Requests are available in the "Create Request" section.
- K Maximize and Change View to expand content for full viewing and application functionality
- **L Reports** are listed and accessible from the "Space Information" section.

# **Facilities Connect: Basic Navigation**

#### **USING FORMS**

•

- Enter data to make updates and/or requests in a form. A form is the presentation of data and data fields in a window.
  - M Pop Up Forms open as a new window on top of the user's active Facilities Connect screen.
  - **N** Required fields in a form are marked by a red asterisk (\*).
  - **O** Text fields allow the user to add freeform text entry.
  - **P** Dropdown menu fields allow the user to select from a list of available options.

Inthurstorn EACILITIES	CONNECT		wetcome, Northy	vestern wildca	it i signiout	C   ADOUL		
In the stern Pacifices (	JONNECT			c	ompany Proj	ject 🔎		
Home Portfolio								
Locations - Organizations - People - Assets	✓ Portfolio Set Un. ↓							
🔟 Space: 01181 - Google Chrome								
Secure   https://northwestern-qa.tririga.co	m/WebProcess.srv?objectId=750000&actionId=750011≺	opertyld=208133&projectId=	1&specClassType=6&yp	eld=100028	73&action=I	Edit&mar	nagerType	ΨP
Space: 01181							🖶 Pri	nt 🕐 He
				Activate	Save Sav	e & Close	Space Update Re	uest x
Space Details Floor Plan Allocation Histor	V Notifications Notes & Documents							
Space Details Floor Plan Allocation Histor	y Notifications Notes & Documents							
Space Details Floor Plan Allocation Histor	y Notifications Notes & Documents							
Space Details Floor Plan Allocation Histor	y Notifications Notes & Documents							
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792	y Notifications Notes & Documents <u>Building Description</u> Ward Building	<u>Floor</u> 01	Wing	(N) *	Room Num	ber 0118	11	
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792 Area 118.73	y Notifications Notes & Documents <u>Building Description</u> Ward Building Status Draft	<u>Floor</u> 01	Wing	N *	Room Num	ber 0118	11	
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792 Area 118.73 Description	y Notifications Notes & Documents <u>Building Description</u> Ward Building <u>Status</u> Draft	<u>Floor</u> 01	Wing	<b>N</b> *	Room Num	ber 0118	11	
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792 Area 118.73 Description Program Class 40 - Academic Support	y Notifications Notes & Documents           Building Description         Ward Building           Status         Draft	<u>Floor</u> 01	Wing	<b>N</b> *	Room Num	ber 0118	и	
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792 Area 118.73 Description Program Class 40 - Academic Support Capacity 1	y Notifications Notes & Documents           Building Description         Ward Building           Status         Draft	<u>Floor</u> 01	Wing	<b>N</b> *	Room Num	ber 0118	11	
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792 Area 118.73 Description Program Class 40 - Academic Support Capacity 1 Space Information	y Notifications Notes & Documents           Building Description         Ward Building           Status         Draft	<u>Floor</u> 01	Wing	<b>N</b> *	Room Num	ber 0118	i1	
Space Details Floor Plan Allocation Histor Building / Space Details Building ID 8792 Area 118.73 Description Program Class 40 - Academic Support Capacity 1 Space Information	y Notifications Notes & Documents <u>Building Description</u> Ward Building <u>Status</u> Draft	<u>Floor</u> 01	Wing	<b>N</b> *	Room Num	iber 0118	11 Find 1	Clear

### FILTERING, SORTING & CHANGING VIEWS

- Within a form you can filter, sort, and change a record or report's view.
  - Q Inline View allows record viewing in the same window.
  - **R** Popup View displays the record as a popup in a new window.
  - S sort in ascending or descending order by clicking the column heading.
  - **Filter** by typing in an available field, which says "Contains." You can filter by multiple fields, which will vary based on your view.

	Home P	ortfolio											
Hom	• > Building	Occupant Con	tact List							📑 Open In	New Window	Add to Bookmarks	My Bookmarl
												Q	Popup View
0	Apply, Filters	Clear Filters										R	Popup View
Please	type in the appr	opriate filter values and	press the "Enter" key o	or click on "Apply	Filters" to perform a q	wery.						Ŭ	
	Campus	Building ID	Building S	Floor	Space ID	Space Name	Space Classification	Department Name	Department Description	Assignee Name	Assignee ID	Occupant Name	Occupant eMail
<b>(T</b> )	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains	Contains
									R	6			

For more information, visit the Facilities Connect website at www.northwestern.edu/fm/connect