



# 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 | FACILITIES CONNECT

Welcome, Northwestern Wildcat | Sign Out | About

Company Project

The screenshot shows the main portal interface. At the top, there are navigation tabs: Home, Portfolio, Locations, Organizations, People, Assets, and Portfolio Set Up. Below these are dropdown menus for Home > Portfolio and Open In New Window, Add to Bookmarks, and My Bookmarks. The main content area is divided into sections: Notices (Action Items, Notifications), Requests (My Active Requests, Requests Pending Approval, Create Request), Last Visited, My Responsible Department Assignments and Assignee Details (a table with columns for Organization Name, Description, Percent Allocated, Building ID, Building, Floor, Space ID, Area, Room Area, and Space Class), and Space Information (Area by Space Class Parent, Area of Building by Department, Assignee Space Report, Building Data, Building Occupant Contact List, Building Occupant List, CRIS Report, CRIS Report - Lab Users, NSF Report, Office Area Capacity, Overall Total Campus Square Footage, Research Area, Space Class Count by Building, Space Report by Building, 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.



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## 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.

## 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.
  - (T) **Filter** by typing in an available field, which says "Contains." You can filter by multiple fields, which will vary based on your view.