HUMBOLDT STATE UNIVERSITY

Facilities Management

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Standard Operating Procedure: PD003-150224

Title: Establishment of FacilitiesLink Custom User Groups & Document Folder Access

The following procedure shall govern establishment of FacilitiesLink custom user group:

- All FacilitiesLink users shall be assigned an account based on a user template for which their position or relationship to the University is best suited. Some users may require access to specific information within the FacilitiesLink Documents module. To grant access and ensure such is restricted to the information required, the FacilitiesLink Administrator must develop a custom group to allow such.
- Access to the FacilitiesLink Documents module is managed separately from user accounts. Usage is managed via the Administrator area under the Users & Groups section and within the Groups Database. Within the Groups Database, there are three separate levels of groups: 1) Applications, 2) System, and 3) Custom.
    - The Applications level should not be modified or utilized as access to these areas are controlled by the assigned user template for each FacilitiesLink account.
    - The System level should never be used unless it is for administrative purposes for the Facilities Link Administrator.
    - The Custom Groups level is used by the FacilitiesLink Administrator to grant access to groups of users for specific files located within the Documents module in FacilitiesLink.
        - To share documents with a particular user or group of users, the document folder must have access to the same custom group the intended user(s) belongs to.
        - Custom group names preset for each user template have been developed to allow appropriate Documents module access.
        - Additional custom group names are developed by the FacilitiesLink Administrator as required based on the needs of particular groups. To develop such, the FacilitiesLink Administrator follows the steps outlined below:
            - From the Home menu, click on the Documents button.
            - Once in the Documents module, click on the New Folder button.
            - Enter the folder name ensuring such clearly describes the established project or access purpose.
            - Enter an abbreviated name. If an error message is received, the abbreviated name contains too many characters.
            - Once complete, click Create. This will re-open the Documents module.
            - Click on the folder created and then, at the bottom of the folder, click "Manage Access". Under the Custom section, click on the appropriate group(s) that should have access to the folder. Do not modify the Applications or Systems section.

PLANNING ♦ DESIGN ♦ CONSTRUCTION ♦ SUSTAINABILITY ♦ OPERATIONS ♦ MANAGEMENT

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- Once complete, navigate away from the page using any navigation button. The selections will auto save with no additional steps.

REFERENCES
- PD002-150120 Establishment of FacilitiesLink User Templates & Access Levels

ATTACHMENTS
- N/A