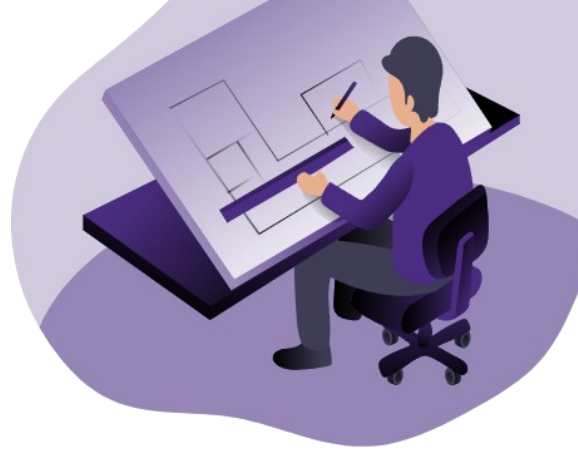# DocFinity Job Aid #1

What is it, where is it, and how do I use it?

DocFinity is an online application for facility records (*formerly known as Facilities Information Library—FIL*). This tool can help you find the information you need to do your job safely, effectively, and quickly.

These job aids will help you find it, use it, and get the most out of it.
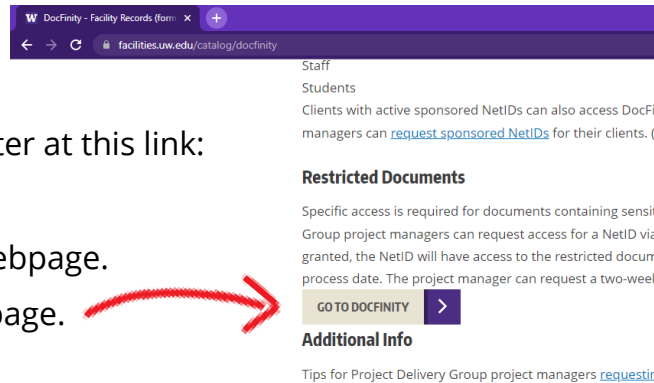
1

Where

You can access DocFinity from any internet connected computer at this link:

https://facilities.uw.edu/catalog/docfinity

You can also find it by searching for DocFinity from any UW webpage.

The link to open the program is about halfway down the webpage.

Staff
Students
Clients with active sponsored NetIDs can also access DocFi
managers can request sponsored NetIDs for their clients. (

Restricted Documents

Specific access is required for documents containing sensit
Group project managers can request access for a NetID vi
granted, the NetID will have access to the restricted docum
process date. The project manager can request a two-weel

GO TO DOCFINITY ›

Additional Info

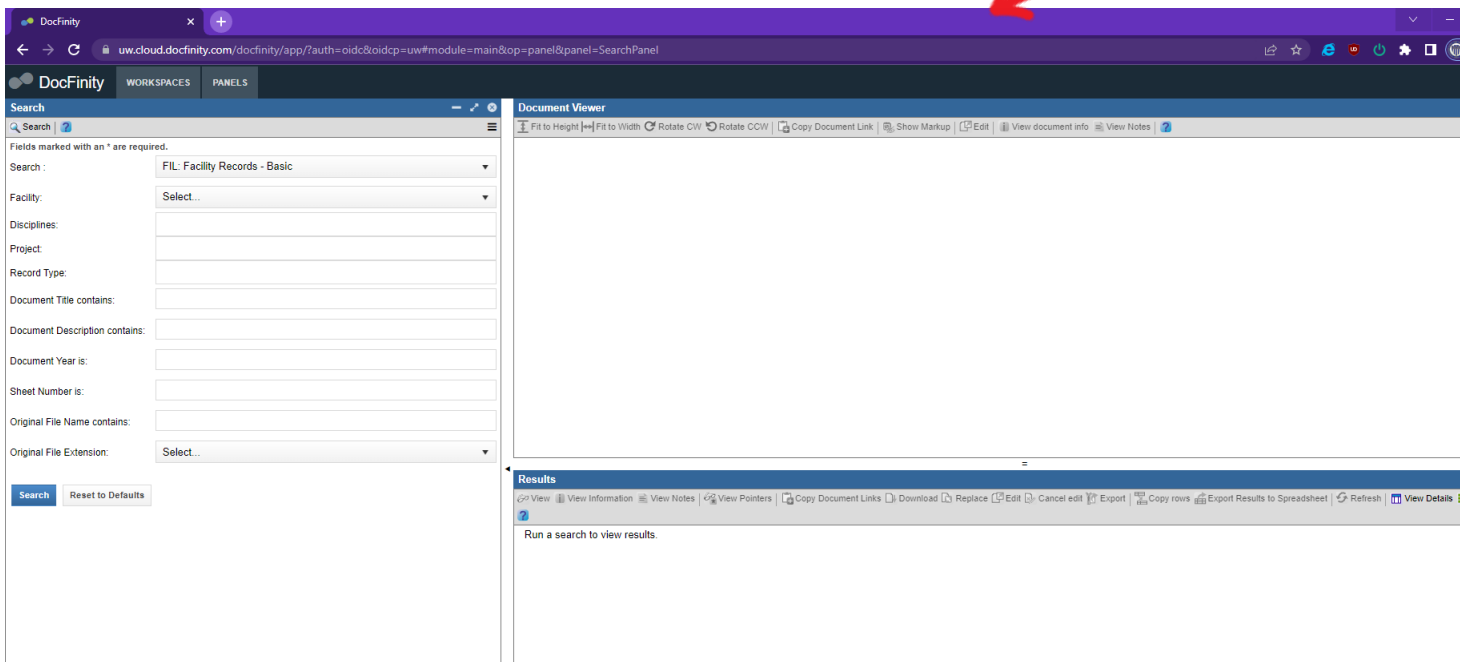Tips for Project Delivery Group project managers requestin

2

How

Log in with your NETID & password, just like you do with Workday.

Once you have logged in, you should see something that looks like this.

UNIVERSITY of WASHINGTON

Please sign in.

UW NetID:

Password:

Forgot your password?

Sign in

Learn about account recovery options
Learn about UW NetIDs
Learn about UW NetID sign-in
Obtain a UW NetID

Need help?

Sign in reduces how often you have to reauthenticate to access UW resources.
Learn how to sign out at the end of your browsing session.

3

DocFinity

Once you have logged in, you should see something that looks like this.

DocFinity Job Aid #2

Understanding the User Interface

The DocFinity program is divided into 3 panels: **Search**, **Document Viewer**, and **Results**.
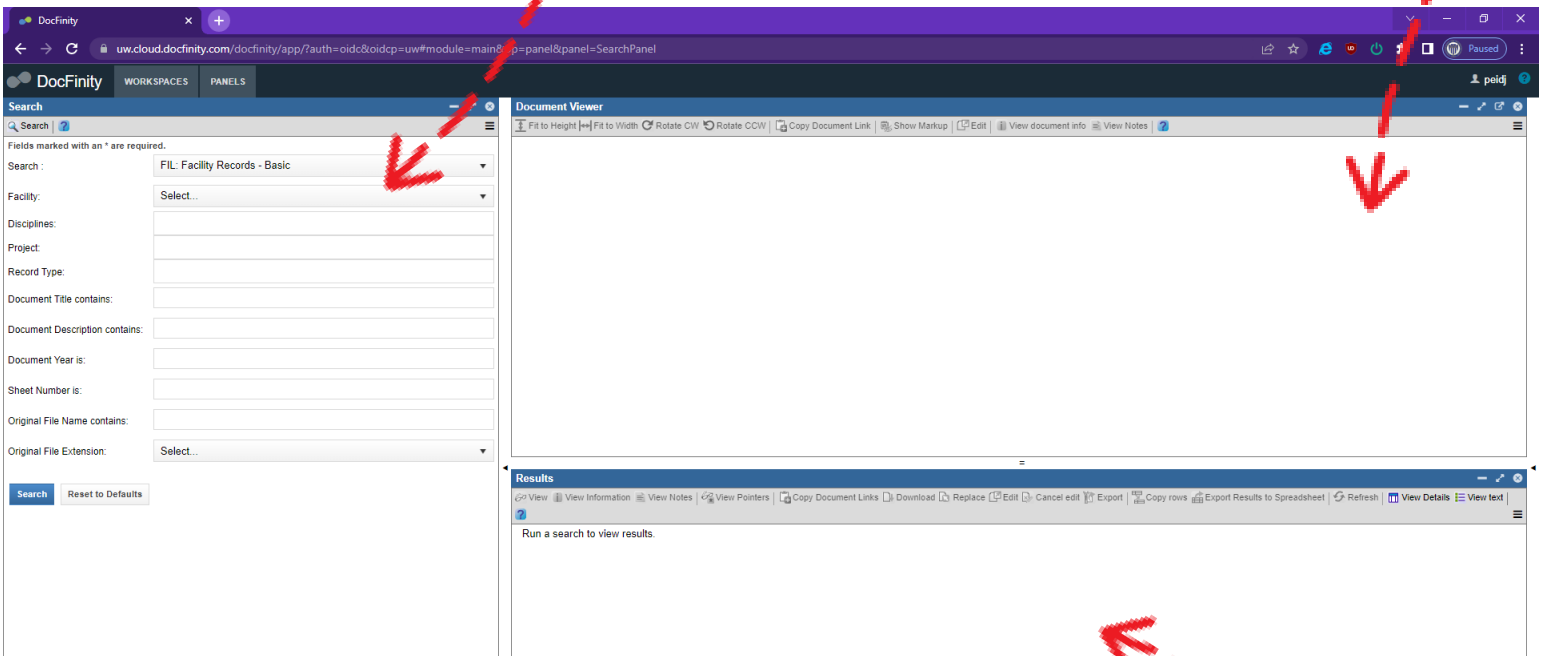
Search

This where you start. Enter your details here to find documents related to your work order.

Document Viewer

You can view a document in this panel.

Results

Your search results will show up in this panel.

Logout & Preferences

You can log out, or find your preferences by clicking on your user name here.

Panel Settings

Each of the three main panels has its own settings. You can even pop a panel out into its own browser window.

If you close a panel and need to get it back, click the Panels button in the upper left corner of the program.
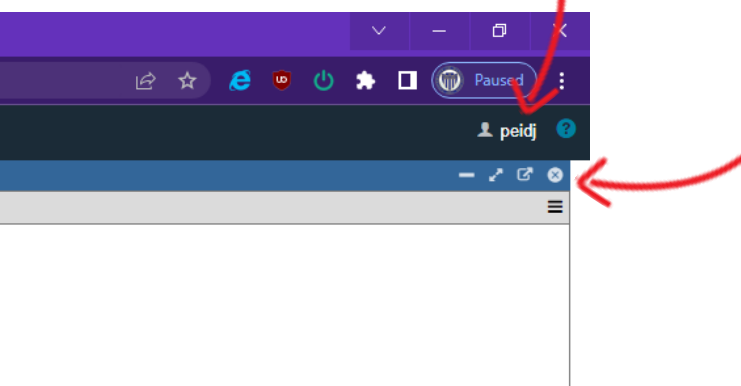
DocFinity Job Aid #3

Searching for Documents

To find the documents you need, use the Search Panel. Enter any information you have about the document you are trying to find into the relevant fields, and then click the "Search" button.

Below we tell you about the main options we recommend using. You don't have to put something into every text box. If you don't know something, just leave it blank.

Search

Keep it basic. Only use the advanced search if you know a lot about the document you are trying to find.

Facility

This is the building you are working on. You can start typing the name or number to find what you're looking for quickly.

Disciplines

This is the system type, which roughly corresponds to the trade you need to know about. You're options are:

- **Mechanical** (HVAC, Plumbing, Fire Alarms)
- **Electrical**
- **Civil** (Buried Utilities, grading, parking lots—anything outside the building)
- **Architectural** (Roofing, Siding, Glazing, Doors, and finishes—paint, carpet, etc.)
- **Structural** (Walls, Floors, Framing—the building structure itself)

Document Title Contains

If you know some keywords that might be in the document title you are looking for, put them here. For example, you might put the floor number, or the name of the system.

The document titles are usually very simple, though, so don't try to get too fancy. A simple word or two to narrow down your results is usually enough.

What about all those other boxes?

If you have more information, go ahead and try using those other boxes. However, many documents just don't have data for those options, so they probably won't help much. But feel free to try them out. Experiment, explore! We promise you can't break anything.

DocFinity Job Aid #4

Viewing Documents

Now that you have searched, you will need to view the results. Here is how you can do that.

Search Results

Your search results will show up in the Results Panel.

Each document is a row. In the lower right hand corner, the program tells you how many documents your search returned. Use the arrows in the lower right hand corner to view more documents on the next page.

Each column tells you something about your document, such as title, type, or year.

To view a document, click on it in the list (it should become highlighted and check marked), and then click the "View" button in the upper right hand corner.

You can also download the document by clicking the "Download" button in the Results Panel. *Learn more about that on Job Aid #5*

Some documents **must** be downloaded because they are too large or cannot be opened by DocFinity. *Learn more about that on Job Aid #5*
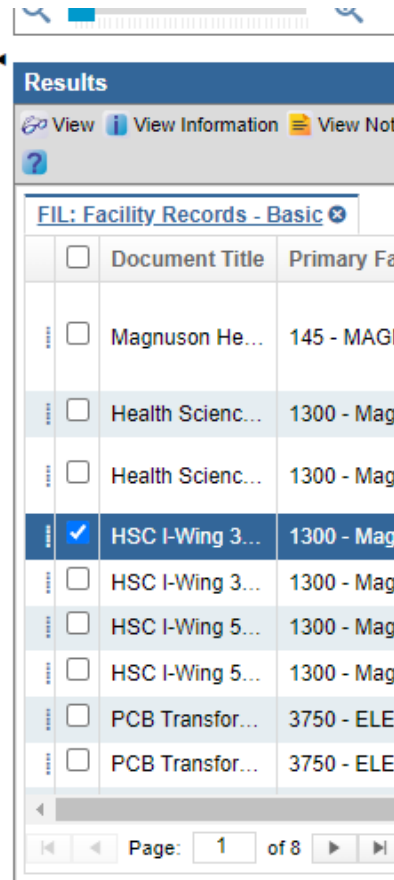
Document Viewer

After clicking "View", the document will open in the viewer. You can zoom in and out using the magnifying glass in the lower left corner.

You can rotate the document if needed, view information about it, or copy the link to this document for easy sharing with others via email.

If you need more scree space to get a closer look at a document, you can minimize the Search or Results Panels using the flat line button one each, or you can open the Document Viewer Panel into its own window.

You Can Search Again

You might need to click through a few documents to find the right one.

If you still can't find what you are looking for, try searching again using different options or keywords.
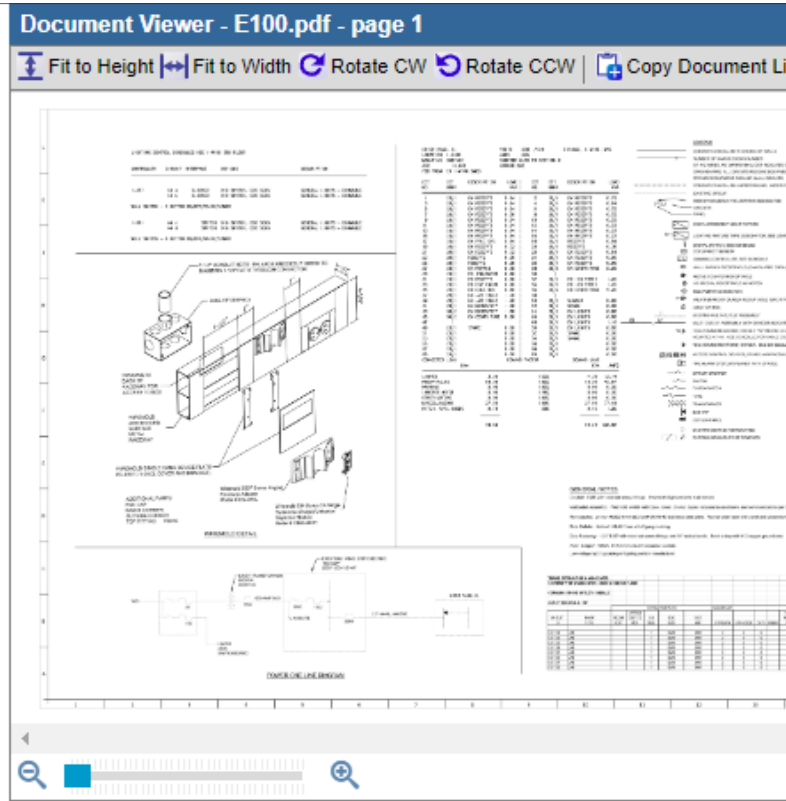
DocFinity Job Aid #5

Downloading Documents

Sometimes, you have to download a document to view it. It may be too big for the DocFinity Document Viewer to open, or it might be a file type that can't be opened with DocFinity.

If that happens and you aren't sure how to do that, *don't panic!* This job aid will help you download and open your file.

How to Download

To download a document from DocFinity, select the document you want in the Results Panel, then click download.
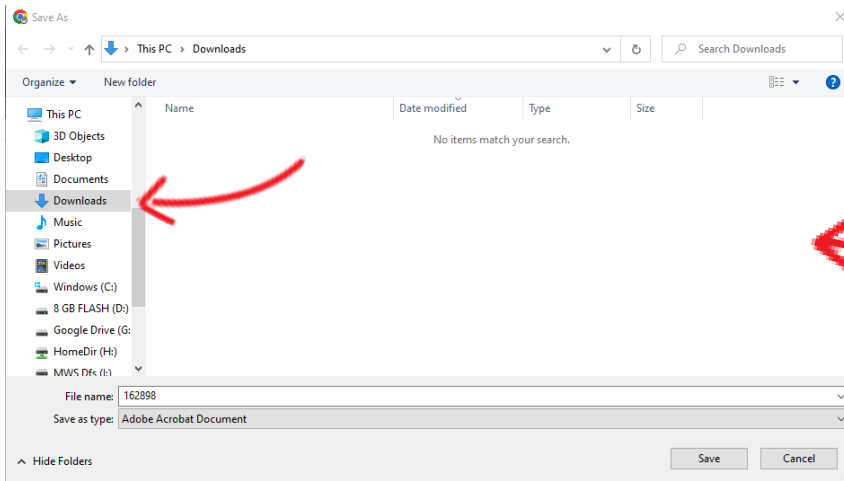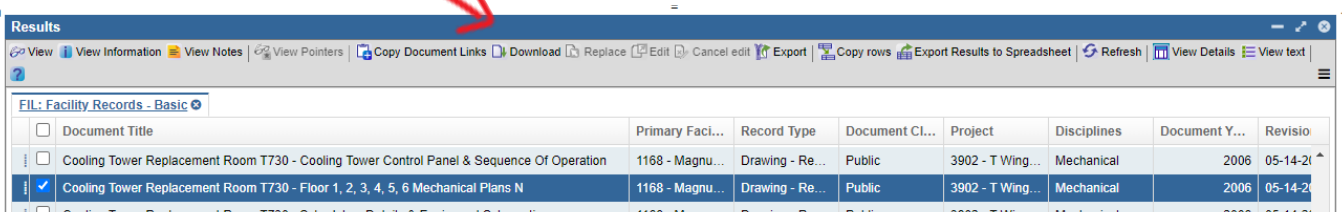
Save Documents

Your computer may ask you where you want to save the document. It will look something like this image.

We recommend selecting the "Downloads" folder from the options in the left hand column. Click Save when you are ready.

Find Downloaded Documents

If your computer didn't ask you where to save the document, that's ok. It means it automatically saved it to the "Downloads" folder. Here is how you open it.

Open Windows File Explorer. You can do this by clicking on the folder icon in the taskbar or by pressing the Windows key (in between Ctrl and Alt) and the E key on your keyboard at the same time.

Once you have opened File Explorer, you will see a list of folders on the left-hand side. Look for a folder named "Downloads" and click on it.
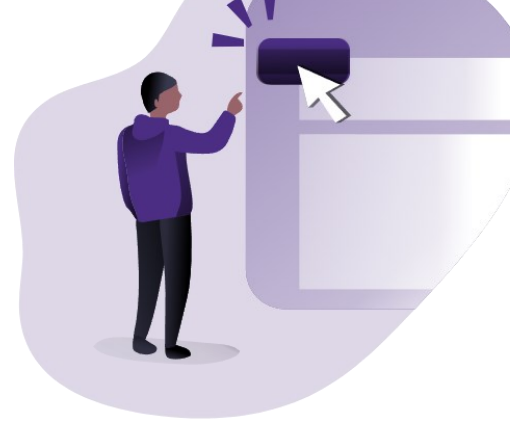
Find your document, it should be the top one, and double click on it.
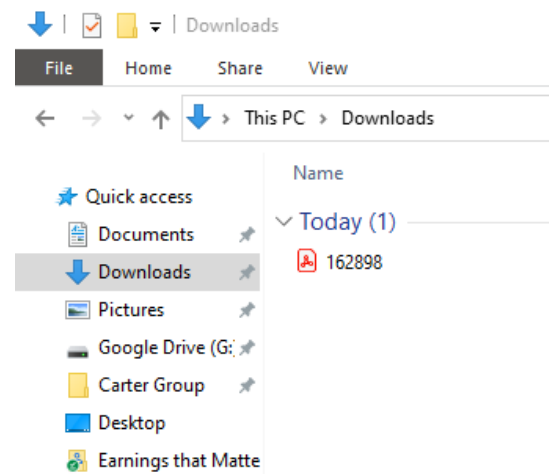
DocFinity Job Aid #6

Changing your preferences

DocFinity is unique to you. This means you can change your preferences and save your workspaces. Here's how.

Where

You can change your preferences by clicking on your username, located in the upper right hand corner. You can save your current workspace (how your panels are arranged) by clicking the Workspaces button in the upper left.
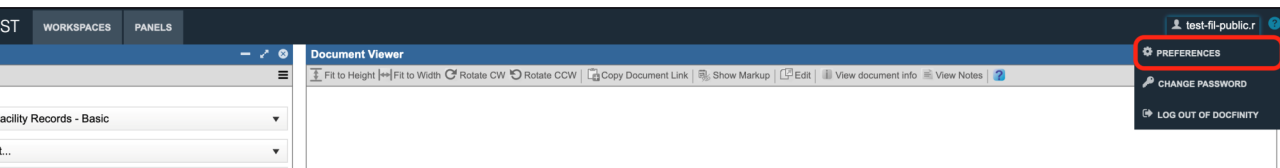
Change PDF Viewer

We highly recommend you change your PDF reader. This will speed up DocFinity and make your work much faster. To do this, open your preferences (see above).

Within your Preferences, click the "Document View" tab.
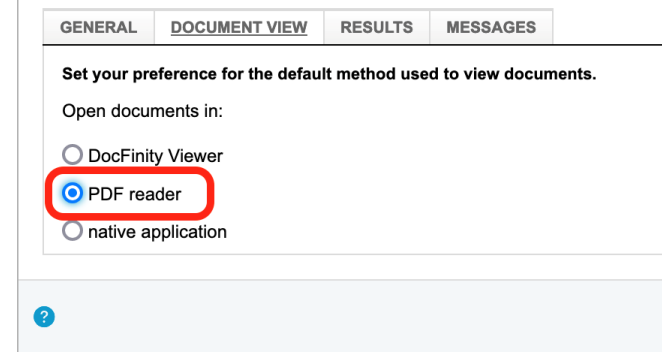
In the Document View tab, select PDF reader.

Click Save.

Most documents will now open in a browser tab, and will open much more quickly, saving you time as you try to find the right document.

DocFinity FAQ

We answer some common questions, and where to go for more help.

What is DocFinity?

DocFinity is a document management tool for storing and finding system drawings, blueprints, and other information related to our facilities. It takes the place of what we used to call FIL, the Facilities Information Library.

Why did we change programs?

The old program was more expensive, and there was no standardization across different UW teams. By switching to DocFinity, we save time and money while also upgrading to a modern, cloud based system. There was a lot that went into this decision, and while there may be some kinks to sort out, we are confident this change is for the best in the long run. If you would like to know more, reach out to the UWF Records team.

What happens to existing FIL links?

Existing FIL links to specific documents should redirect you to the same document in DocFinity. However, links to saved searches in FIL will not redirect, and will need to be updated using DocFinity.

Where can I get help?

We recommend reaching out to your supervisor first. For additional questions about DocFinity, the teams below may be able to help.

Engineering Services

fsesweb@uw.edu

https://facilities.uw.edu/unit/engineering/contact

UWF Records

records@uw.edu

206-616-4475

206-221-4369

https://facilities.uw.edu/catalog/docfinity