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FACILITIES CONNECT REPORTING: FACILITIES REPORT MATRIX

Provides descriptions for all school reports in the Facilities Connect reporting tool Tableau.

Report Name	Report Description	Format
VIEWING ACTUAL WORK TASKS		
Work Task Lookup	Gives the user a full list of Work Tasks to look through with the Task ID, Task Name, Task Description, and Status.	Table
Active Estimate Requests Work Tasks	Gives the user a full list of all active estimate requests for work tasks by created date. Users can filter by age of request and status.	Table
Active Work Task by Requester	Gives the user a list of active work tasks by requester.	Table
Assigned Work Tasks by Shop	Shows all active work tasks by department responsible and by creation date.	Table
PERFORMANCE – COMPLETED WORK TASKS		
Completed Work Tasks by Month	Provides a graph showing the number of completed work tasks by month along with the average number completed shown by a straight line across the graph. Additionally, a dotted trend line shows the general trend of the amount of completed work tasks for the time period provided.	Graph
Completed Work Tasks by Class By Month	Gives the user a table showing the number of completed work tasks by service class, by month, color coded with the darker colors meaning more completed work tasks. The table is sorted by service class with the greatest to least number of completed work tasks.	Graph
Average Completion Rate Per Work Task	Gives the user a table showing the average completion rate per work task by month created, in terms of the duration in days, the number of records, and the average duration per work task.	Table
Work Tasks Completed On-Time vs. Overdue	Provides the user two different tables. The first table shows the percentage of work tasks completed on time vs. overdue based on planned and actual end dates by month. The second table shows timeliness of completed work tasks by shop filtered for work tasks more than 90 days overdue from planned completion date. The data is shown by month of actual end date and responsible organization.	Table

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PERFORMANCE – ACTIVE WORK TASKS		
Active Work Tasks by Priority	Gives the user a list of all active work tasks by priority level by the number of days work tasks are outstanding.	Table
Active Overdue Work Tasks by Planned End Date	Gives the user a table showing the total number of active overdue work tasks by month of planned end date and the number of days it is overdue by.	Table
Active Overdue Work Tasks by Shop	Gives the user a table showing the total number of active overdue work tasks by shop and by number of days overdue.	Table
OTHER WORK TASK REPORTS		
Created Work Tasks Per Month	Gives the user a graph showing the number of created work tasks by month along with the average number shown by a straight line across the graph. The graph also shows a trend line across the graph showing the general trend for the amount of created work tasks for the time period provided.	Line Chart
Breakdown of Work Tasks by Task Type	Gives the user a table showing percent of work tasks by task type by month.	Table
Assigned Work Task Count by Shop by Month	Gives the user a table showing the total active work tasks sorted by volume of work tasks by shop and by month. The table is color coded with the darker colors signifying greater assigned work tasks.	Table
Work Task by Billing Type	Shows a pie chart of all work tasks by the different billing types including Building, Intra-FM, and Non-Building.	Graph
Top 10 Work Tasks by Dimension	Shows a table of the top 10 work tasks by requested class by the number of records and as a percent of total. It also shows a table of the top 10 work tasks by building by the number of records and as a percent of total. Both tables are translated into a pie chart as well.	Dashboard
Work Tasks Completed Within 30/60/90 Days	Shows the completion rate or the difference between the planned and actual end date of work tasks that are 30,60,90 days old.	Table
Active Work Tasks by Planned End Date	Provides a list of all active work tasks by building, service class, responsible organization, and by planned end date. Can filter to select a specific month for planned end date.	Table

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Report Name	Report Description	Format
WEEKLY REPORTING FOR WORK TASKS		
Non-Building Corrective Tasks Trend	A graph displaying the trend of non-building corrective work tasks by week of creation date. The solid line displays the average number of work tasks, while the dotted line displays a general trend line in the number of records.	Graph
Building Corrective Task Trend	A graph displaying the trend of building corrective work tasks by week of creation date. The solid line displays the average number of work tasks, while the dotted line displays a general trend line in the number of records.	Graph
Created Work Tasks Per Week	Shows the number of work tasks created in a week by month of creation date.	Graph
Work Task by Type	Shows the number of work tasks by task type and by week of creation date.	Graph
Corrective Work Tasks by Week by Billing Type	Shows the number of corrective work tasks by billing type (Building, Intra-FM, No-Charge, Non-Building, and Overrule) by week of creation date.	Graph
VIEW ACTUAL SERVICE REQUESTS		
Service Request Lookup	Gives the user a full list of Service requests to look through with the Created Date/Time, Service Requested, Building, Task ID and Request Status.	Table
Service Request Pending Approval	Gives user service requests that have been pending approval for beyond 90 days.	Table
Non-Building Service Requests by School/Unit	Gives user a breakdown of non-building service requests sorted by school or departmental and by chart string.	Table
PERFORM SERVICE REQUESTS		
Total Service Requests Created	Shows the total number of service requests created by source of service request including SR or CC by creation date.	Table
Currently Active Service Requests by Creation Date	A graph displaying all active service requests by month of creation date.	Graph

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Report Name	Report Description	Format
JOB COST REPORTING		
Cost Per Work Task	Provides the total cost of work tasks, the number of work tasks, and the average work task cost by creation month.	Table
Reconciliation Dashboard	Provides a snapshot of work tasks by task ID, name and description, debit account, the job cost amount, the total journal amount, and the difference between the two. The two tables show what is in FC but absent or different in NUFinancial and vs. versa.	Dashboard
Charge Per Work Task	Gives the user a table showing total Work Task charges, total Work Tasks, and the average charge per Work Task broken down by month.	Table
Work Task Billing Allocations Not Equal to 100%	Shows all work tasks by creation date, task name and description, and status, of all tasks where the percent of allocation is not equal to 100%.	Table
BUILDING EQUIPMENT		
Equipment Work Task History by Building	Provides all work tasks, the building equipment name, and ID by planned and created date.	Table
ROOT CAUSE ANALYSIS		
RCA Lookup by Building	Provides a list of work tasks along with the work RCA ID, work RCA name, problem, cause, as well as remedy.	Table