

O&M REPORTING

JOB COST SUMMARY AND DETAIL REPORT

Provides guidance for the Operations and Maintenance Report **Job Cost Summary and Detail Report**. This report is not located in Facilities Connect and requires a Tableau license.

▼ GETTING STARTED

For more Tableau resources, use the Resource and Support section on the Facilities Connect Reporting page. There you will find guides such as the Tableau Resource Guide and How to Save a Report.

DIRECTIONS:

- From the Facilities Connect website:
 - Locate and click on the Reporting section on the right side of the screen.









O&M REPORTING JOB COST SUMMARY AND DETAIL REPORT

DIRECTIONS:



continued.

From the Reporting page,



Scroll down to the Reports section.

Click on the Work Task Reports option to open the drop-down menu.

	Access and Licenses										
	> Access										
	> Licensing										
	> Log In										
2a	Reports										
	> Service Request Reports										
b	> Work Task Reports										
	> Facilities Reports (Facilities Staff Only)										

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Click on the Job Cost Summary and Detail report.

p	orts
S	ervice Request Reports
V	/ork Task Reports
	• Work Task Lookup 🗹 - provides a list of Work Tasks to look through with the Task ID, Task Name, Task Description, and Status.
	• Active Work Tasks by Requestor 🗹 - provides the user a list of active work tasks by requester.
	• Completed Work Tasks by Class Per Month 🗳 - provides a table showing the amount of Completed Work Task by shop and by Month color coded with the darker colors meaning more completed work tasks. The table is also sorted by shop with the greatest to the least completed work tasks starting from top to bottom respectively.
	• Created Work Tasks Per Month L ² - provides 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
)	 Job Cost Summary and Detail C - otal charges by location, transaction date, requestor, request class, cost type, and debit department/account iDs. Can filter by department, transaction date, building name or address. Charge Per Work Task C - provides a table showing total Work Task charges, total Work Tasks, and the average charge per Work Task broken down by month.



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DIRECTIONS:

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Upon clicking, the report will open in **Tableau**:

Filters are located on the right side of the screen.

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TIP & TRICKS

The default Transaction Date range is "Last 31 days". However, keep in mind that the broader the report the slower it will run. It is recommended to only increase the date range after you have adjusted the other filtering options.

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