CUSTOMER SERVICE
CUSTOMER SERVICE: TASKS SCREEN

Provides guidance for locating and navigating the Tasks screen in Facilities Connect.
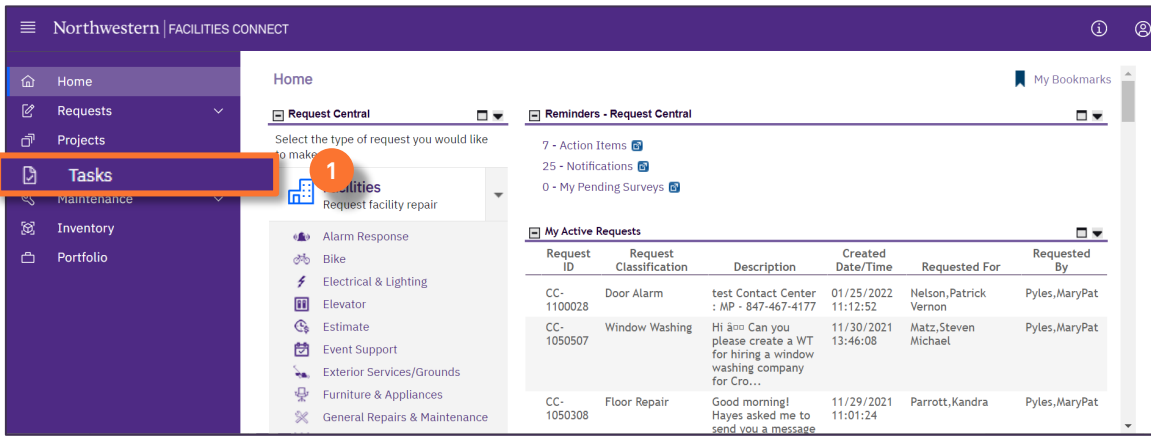

▼ GETTING STARTED

The **Tasks** screen in accessed through the left navigation pane – for instructions on logging into Facilities Connect, please refer to the job aid **Customer Service: FC Access and Home Screen**.
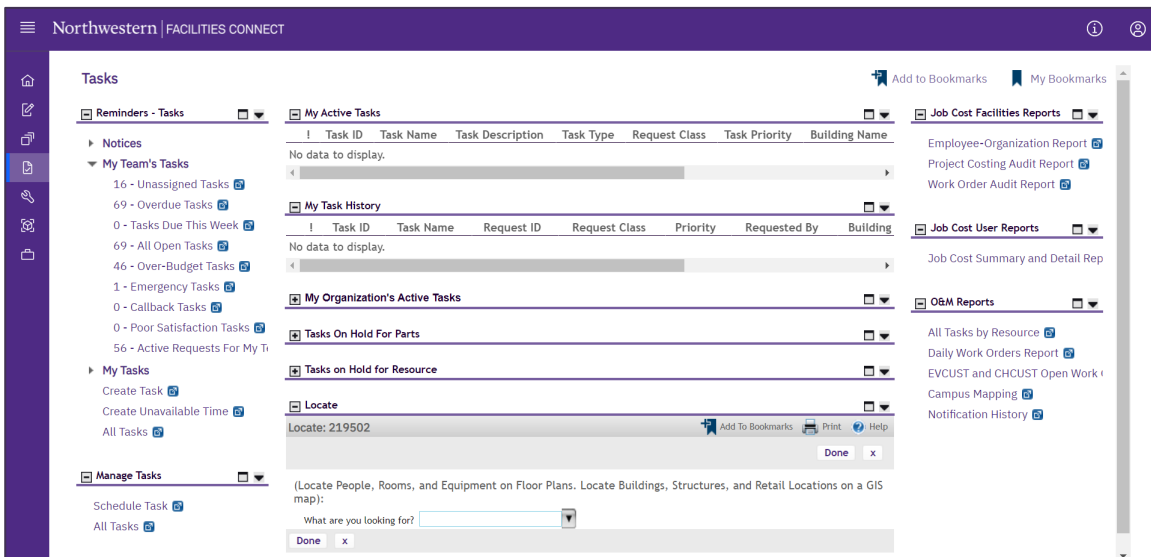
DIRECTIONS:

1 From the **Facilities Connect** home screen:

1 Click on the **Tasks** section.

2 The **Tasks** screen contains information and reports regarding individual **Work Tasks**.
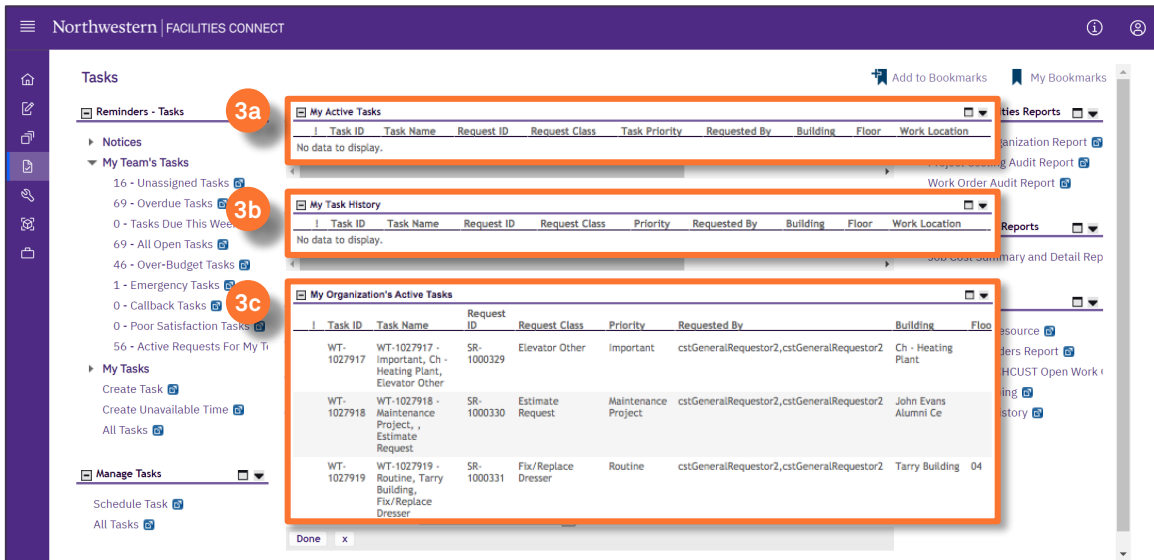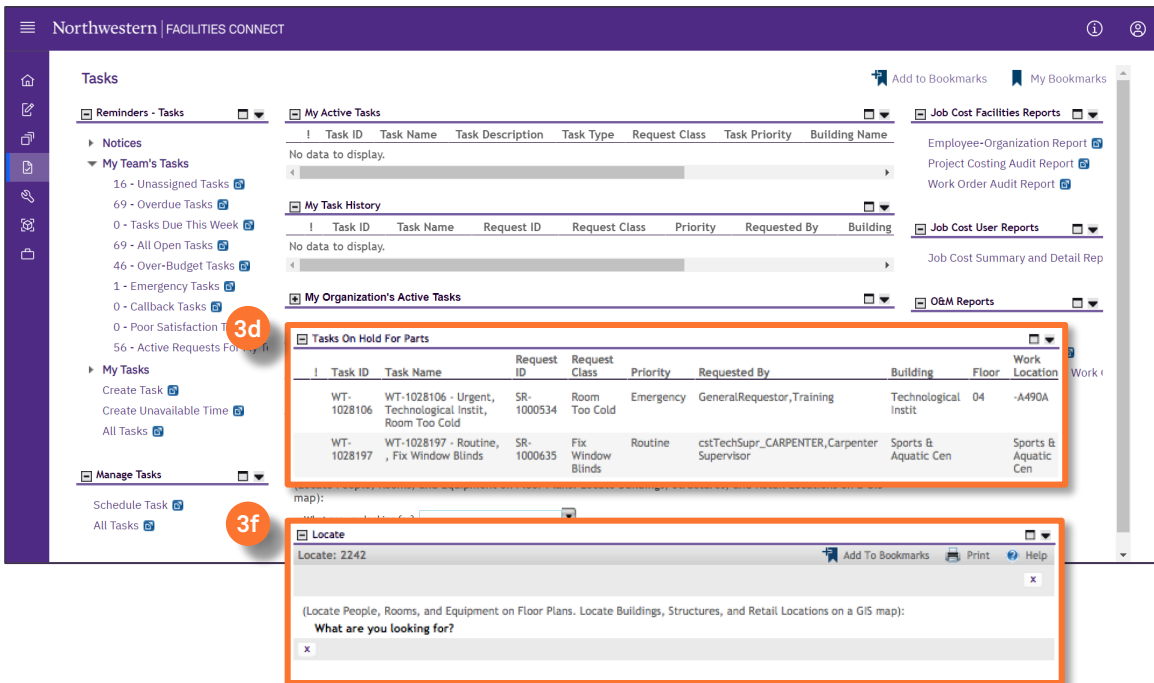
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DIRECTIONS:

3 On the Tasks screen, you access the following sections:

3a **My Active Tasks:** A list of all active Work Tasks that have been assigned to you.

3b **My Tasks History:** A record of all Work Tasks that have been assigned to you.

3c **My Organization's Active Tasks:** All Work Tasks that have been assigned to your Workgroup.

3d **Tasks on Hold for Parts:** All Work Tasks that have been put on Hold and are awaiting parts before continuing work.

3f **Locate:** Search function to locate Buildings, Floor Plans, Rooms, or Equipment on the GIS Map.
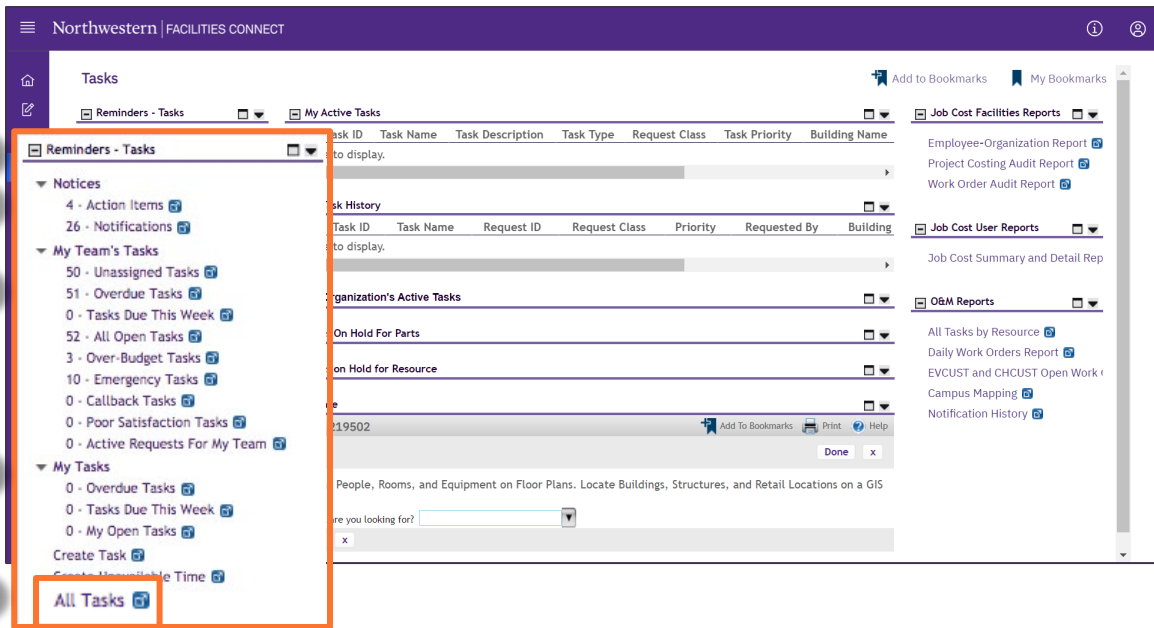
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DIRECTIONS:

3 CONTINUED:

Left screen:

3h **Reminders – Tasks:** Preset and filtered Searches/Reports to assist in locating Work Tasks.

3i **Notices:** Action items or Notifications connected to Work Tasks or Services Requests related to you.

3j **My Teams Tasks:** Searches that include all Work Tasks assigned to your Workgroup.

3k **My Tasks:** Searches that include only the Work Tasks assigned to you.

3l **All Tasks:** all Work Tasks in Facilities Connect, regardless of status.

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DIRECTIONS:

3 CONTINUED:

Right screen:

3f **Job Cost Facilities Reports**

3g **Job Cost User Reports**

3h **O&M Reports**