

CUSTOMER SERVICE

MODIFY WORK TASKS: UPDATE RESPONSIBLE ORGANIZATION

Provides guidance for updating the responsible organization on a Facilities Connect Work Task.

▼ GETTING STARTED

This job aid begins on the **Tasks** screen. For more information on navigating to the **Tasks** screen, please refer to the **Customer Service: Tasks Tab** job guide.

DIRECTIONS:

From the **Tasks** tab, scroll down to locate the **Manage Tasks** section:

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Click All Tasks.

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đ	0 - Emergency Tasks 🗃 0 - Callback Tasks 🚳		Task ID	Task Name	Request ID	Request Class	Priority	Requested By	Building	Floor	All Tasks by Resource 🗃	i.
r S	0 - Poor Satisfaction Tasks 🗃 13 - Active Requests For My Team (🕶 My Tasks		WT- 1041282	WT-1041282 - Scheduled Work, Bobb Hall, PM Corrective Maintenance	SR- 1003599	PM Corrective Maintenance	Scheduled Work	Moser, Robert Gustav	Bobb Hall	BT	EVCUST and CHCUST Open Work Order Campus Mapping	L
۵ ۲	0 - Overdue Tasks 👩 0 - Tasks Due This Week 🛐 0 - My Open Tasks 👩		WT- 1041338	WT-1041338 - Scheduled Work, Tarry Building, PM Corrective Maintenance	SR- 1003659	PM Corrective Maintenance	Scheduled Work	Bochenek,Michael Jason	Tarry Building	10		L
	Create Task 👩 Create Unavailable Time 😰 All Tasks 🛐		WT- 1041435	WT-1041435 - Scheduled Work, Simpson Querrey, PM Corrective Maintenance	SR- 1003754	PM Corrective Maintenance	Scheduled Work	St Aubin,David B	Simpson Querrey	12		
	Manage Tasks		WT- 1041546	WT-1041546 - Scheduled Work, Technological Instit, PM Corrective Maintenance	SR- 1003803	PM Corrective Maintenance	Scheduled Work	Notali,Notali E	Technological Instit			
	All Tasks 🛐		WT- 1041620	WT-1041620 - Scheduled Work, 1801 Maple, PM Corrective Maintenance	SR- 1003872	PM Corrective Maintenance	Scheduled Work	O'Connor,Kevin Charles	1801 Maple			
			WT-	WT-1041621 -	SR-	PM Corrective	Scheduled	O'Connor, Kevin	1801 Maple			



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Upon clicking, the All Tasks screen will open:

Locate and click the Work Task you wish to view.

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	All Tasks					* A	dd to Bookmarks	My Bookman	.rks
								Popup View	-
đ	Work Task		<u>~</u>			Apply Filts	ers Clear Filters	6 4 2	₽.
2		Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization $~~\downarrow~~$	Work Location		
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		WT-1041501 - Urgent, Silverm	WT-1041501	Corrective	General Repairs & Maintenance	Z2ENG	\Locations\Eva	nston Campus\	¢ ^
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	□ !	WT-1042257 -, Pancoe NSUH	WT-1042257	Corrective	General Repairs & Maintenance	Z2ENG	\Locations\Eva	nston Campus\	d
		WT-1042306 - Front seal of h	WT-1042306	Corrective	General Repairs & Maintenance	Z2ENG	\Locations\Eva	nston Campus\	¢
	4 - > 4 -							÷	
	Items per page:	: 50 🗸 1 - 50 of 239 ite	ms				1 of 5 pa	ges	•

TIP & TRICKS

Utilize the column filters and search function to locate the Work Task you wish to view. Layering your filters will make it easier to locate the Work Task.



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DIRECTIONS:



3a From the Responsible Organization section, click on the **Find** button.

Responsible Organization		Assign Auto-/ 3a	Find	Clear
Short Name	Organization Type	-	_	
Hierarchy Path				

The Find Organizations pop-up window will appear:

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3b Use the drop down menu and select Work Groups.

Orga	anizations	^		Apply Filters	Clear Filters	S	☆	$\overline{\mathbf{A}}$
Dep	artments		Hierarchy Path					
My (Companies	ontains						
Work Groups		3b	\					^
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\bigcirc	(GES) GLOBAL EXP	0000134389	\Organizations\Vendors\(GES) GLOBAL EXP	ERIENCE SPECIA	ALISTS, INC			
\bigcirc	/N SOFTWARE INC.	0000215717	\Organizations\Vendors\/N SOFTWARE INC.					
0	1 BEYOND, INC.	0000105587	\Organizations\Vendors\1 BEYOND, INC.					

- Mark the radio button of the Work Group you wish to assign.
- Then, click on the **Ok** button to assign.

					3d OK	~	Cancel	×
	Work Groups	~		Apply Filters	Clear Filters	S	☆	$\overline{\gamma}$
	I.	Name	ID	т	уре			
		Contains	Contains		Contains			
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c	۲	Central Carpenter	1042848	V	/orkgroup			
	0	Central Contractor Custodian	1042885	V	/orkgroup			



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DIRECTIONS:

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Continued.

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Click on the **Save** button to confirm the **Responsible Organization**.

General	Job Cost	Work Details	Resources	Procedures	Notifications	Notes & (Documents	• \$	Supervisor Complete	H 3e		Save Sav	e & Close	More
(Required): Use this tab to enter, review, or change basic information about the task.														
 Genera 	ıl									Accept		Start Work	Stop	Work
	Task ID	WT-1028074						Status A	tive:					
* Ta	ask Name	WT-1028074 - So	cheduled Wo	rk, , PM Corre	ective Maintena	nce	Assignmen	t Status As	signed					
★ Ta De	sk Name	WT-1028074 - So maintain fire co	cheduled Wo introl panel s	rk, , PM Corre hared by Sea	ective Maintena rle (54.5%), Wai	nce rd (37.5%)	Assignmen and Morton	t Status As	signed					
★ Ta De	scription	WT-1028074 - So maintain fire co	cheduled Wo ntrol panel s	rk, , PM Corre hared by Sea	ective Maintena rle (54.5%), Wai	nce rd (37.5%)	Assignmen and Morton	t Status A (8%)	signed					