Northwestern | FACILITIES CONNECT

OPERATIONS & MAINTENANCE



Preventive Maintenance

BULK ACTIONS ON WORK TASKS



BULK ACTIONS ON WORK TASKS

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for taking bulk actions with Work Tasks in Facilities Connect.

The purpose of this document is to serve as guided reference and/or new hire training on building Facilities Connect functionality.

VERSION INFORMATION (THIS DOCUMENT)

Version 1.1 Release Date 03/04/2022

Owner **NU Facilities**

Version This is the original version of the document; content within represents delivered system functionality at Facilities Connect Operations and

Maintenance go-live (2/5/2019), and has been verified as up-to-date of

this document's release (03/04/2022)

REVISION HISTORY

Most Recent →

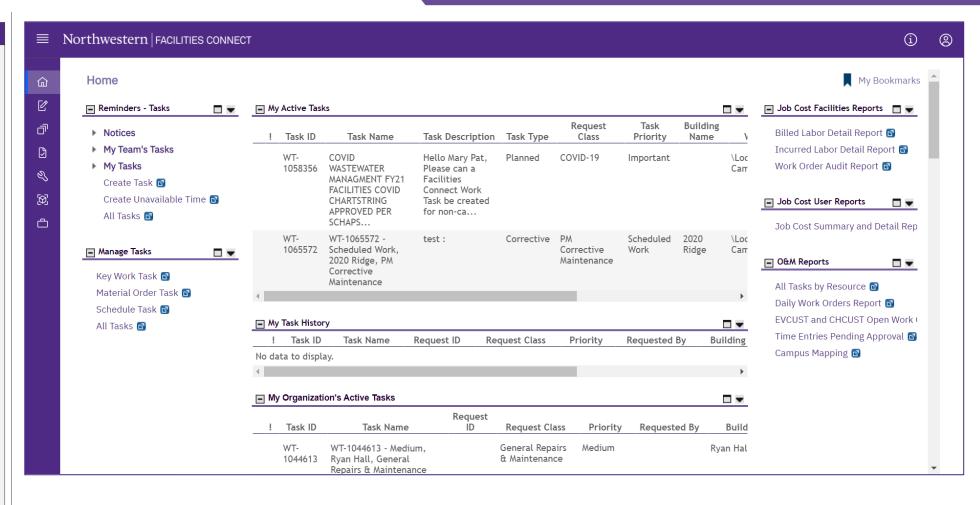
Version	Release Date	Action	Owner
1.1	03/04/2022	Updated	NU Facilities
1.0	08/10/2021	Created	NU Facilities



NOW VIEWING HOME SCREEN

▼ GETTING STARTED

- To begin, access the Facilities Connect Home Screen
- In order to review, modify, and create Work Tasks as outlined in this job guide, the user must:
 - a) Possess the Asset Manager role and responsibilities



▶ PROCESS

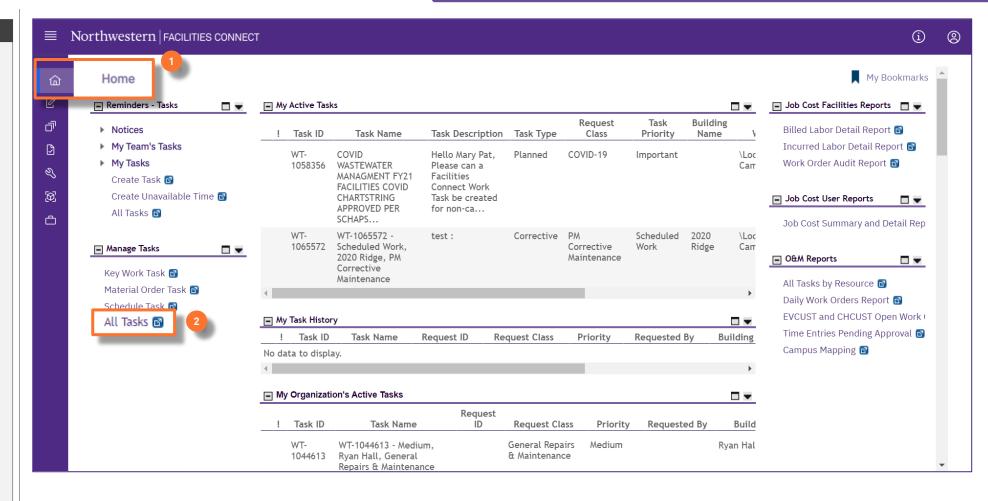


NOW VIEWING HOME SCREEN

▼ PROCESS

- 1) Begin on the Facilities Connect Home Screen.
- Click on the All Tasks report under the Manage Tasks section.

<<Upon clicking, the All Tasks screen will open in
the main window>>



► INFORMATION

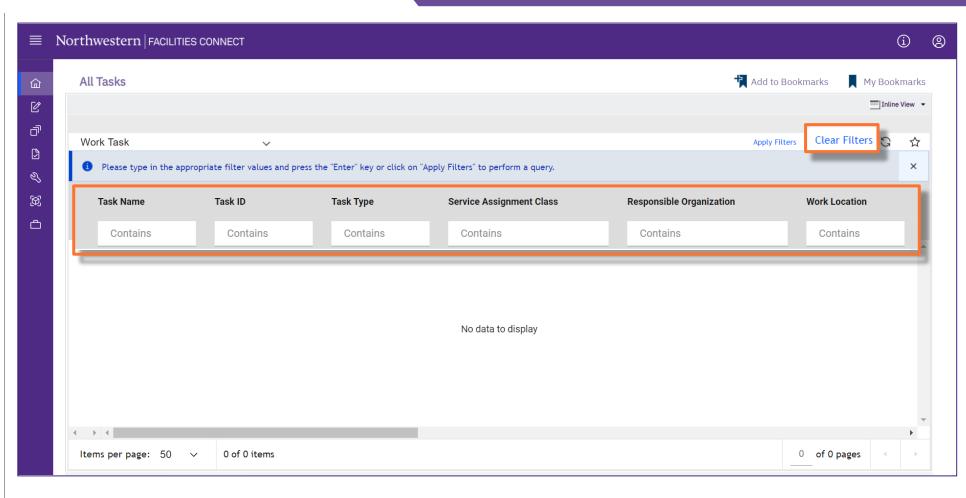


▶ PROCESS

▼ INFORMATION

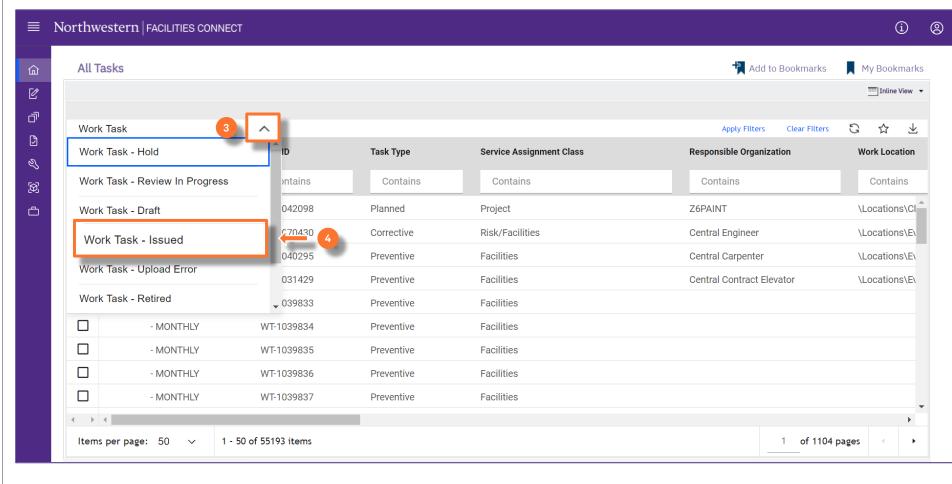
Note that when you arrive on the All Tasks report, it will be blank of information.

To populate the report, enter search criteria into the report OR use the **Clear Filters** option to load all information.





▼ PROCESS To **COMPLETE** Work Tasks, 3) Click on the drop down menu. 4) Select the Work Task - Issued report.

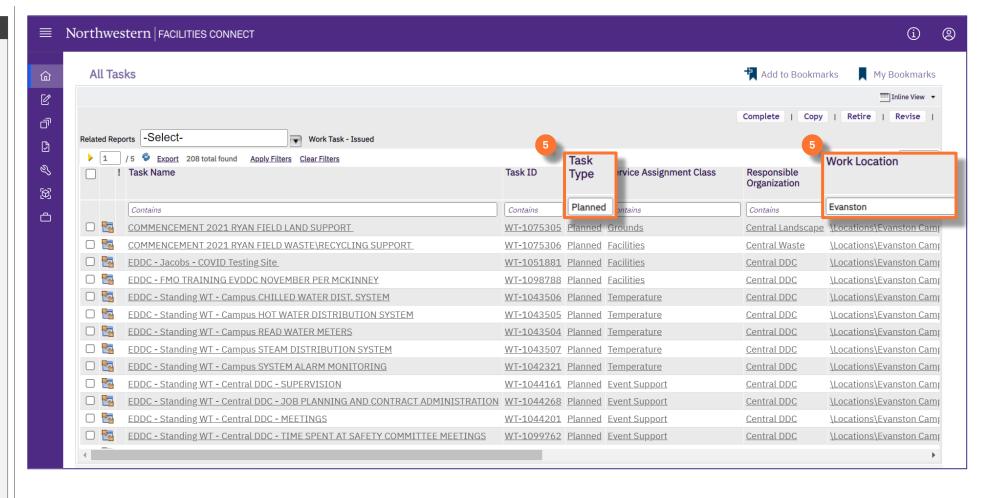


► INFORMATION



▼ PROCESS

5) From this view, you will be able to narrow down your search by filtering for only the Planned Task Type or specific Work Location.



► INFORMATION



▼ PROCESS

- 6) Once you have your filters set, select the Work Tasks that you wish to Complete using the checkboxes on the left-hand side of the screen.
- 7) After selecting the Work Tasks, click the **Complete** button.

► IMPORTANT

You will NOT be asked to confirm your selection once you click the **Complete** button. Please be careful in your selection.

