

CUSTOMER SERVICE

CONTACT CENTER: DISPATCH TASKS

Provides guidance for locating un-dispatched Work Tasks through the Dispatch Tasks report.

▼ GETTING STARTED

The Dispatch Tasks Queue is located in the Contact Center section of the **Requests** screen. For more information on navigating to the Requests screen, please refer to the **Customer Service: Requests Screen** job aid.

▼ INFORMATION

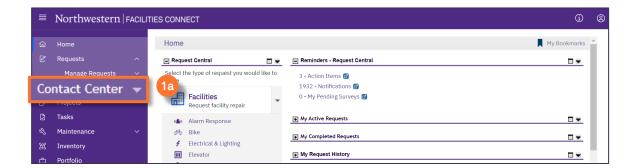
In Facilities Connect, the **Dispatch Tasks Queue** serves as a catch-all for any Work Tasks which do not have an assigned recipient (e.g. a Service Request type which is not mapped to a shop/workgroup). Dispatch Tasks are monitored by Customer Service, who will assign/redirect any tasks from this queue, as necessary.

DIRECTIONS:

1a

To access the **Dispatch Tasks Queue** from the **Requests** section, locate the sub-section menu option for **Contact Center**.

Click on the dropdown arrow immediately to the right of the Contact Center option.





Next, click on Dispatch Tasks.

■	Northwestern	TIES CONNECT		i	8
61 (2	Home Requests ^ Manage Requests ~ Contact Center ^ Call Log	Home Request Central Select the type of request you would like to make Facilities Request facility repair	Reminders - Request Central 3 - Action Items 1932 - Notifications 0 - My Pending Surveys	My Bookmarks	Î
	Manage Duplicate Re Dispatch Tasks	Alarm Response	My Active Requests My Completed Requests		L
5 5 8 8	Projects Tasks Maintenance ~ Inventory	Elevator Estimate Event Support Exterior Services/Grounds Furniture & Appliances	My Request History All Service Requests Request Work Request Request Request ID Task ID Status Type Classification Service Class	Location Request	
đ	Portfolio	 General Repairs & Maintenance Health & Safety Housekeeping 	CC- WT- Issued Service Power Electrical & 1100041 1200251 Request Lighting	\Locations\Evansto Campus\2020 Ridge\04\00415	



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DIRECTIONS:

2a



Upon clicking, you will be taken to the **Dispatch Tasks Queue**. Locate the Unassigned Tasks section:

Locate the Unassigned Tasks section.

Once you have located the desired **Work Task**, click anywhere on the record line to open and view details.

■	Northwestern FACILITIES CONNECT						(D (2)
۵	Dispatch Tasks			🖶 Print	👯 Add to Bookmarks	M	1y Bookmai	'ks
	Dispatch Tasks Duplicate Requests					Done	Save	κ
ð	(Optional): Dispatch Task details.							
۵	- General							
Ľ	Dispatcher Zier, Kathleen Lynn		🔎 🕄 🛛 Manual Dispatch? 🗆					
ଜ			Auto-Dispatch?					
2 a	Unassigned Tasks							
				Apply	Filters Clear Filters	G	☆ ᆋ	5
	! Task ID Task Name	Request Class	Priority	Requested By	Building	Floor		
	2b WT-1041862	WT-1041862 - Capit	Other HVAC Service	Capital Project		Ryan F	ield	
	Items per page: 10 🗸 1 - 1 of 1 items				of 1	pages		-

TIP & TRICKS

Changing the Dispatcher will also allow you to narrow down Tasks when searching.

Review the **Work Task Record**. To redirect the Work Task to another Workgroup (e.g. Engineers Shop), you must update the **Responsible Organization** field (located on the General Tab), and/or update **Work Task Resources** (located on the Resources Tab).

Work Task: WT-1027522-WT-1027522 - Urgent, Lu	rie Resear, Room Too Cold					Add To Bookmarks	Print	😧 Help
	Procedures Notifications Notes & Docume	nts Work Task Info Au	dit Actions	Supervisor C	omplete Hold -	Save Save & Close		x
Resources								
(Required): Use this tab to enter, review, or change	basic information about the task.							
- General					Ad	ccept Start Work	Stop W	/ork
Task ID WT-1027522			Status Active					
* Task Name WT-1027522 - Urgent, L	urie Resear, Room Too Cold		Assignment Status Assigned					
Description too cold respond asap								
- Details								
Task Type Corrective	0 9	Task Priority Urger	+	P 8				
Request Class Room Too Cold	 2 0	Service Class Temp		20				
Primary Work Location \Locations\Chicago C	,				uilding Address 3	03 E Superior St		
Geography Lookup				PB	Building Name L	urie Resear		
Customer Organization \Organizations\North		_SYS\NUIT_ADMIN_SYS5	NUIT_ADMIN_SYS6\1742100	Build	ing Primary Use			
Preferred Access Time Afternoon (12:00-16:	59)							
 Requests 						Find	Rem	ove
Export 1 total found			D 10	Full Name			how: 10	٣
I Request ID Created Date/T			Request Class			Work Phone		
SR-1000001 11/20/2019 10:3	too cold res	pond asap	Room Too Cold	Rodriguez, John	7	847/467-4731		
 Projects 						F	ind Cl	lear
Contract						F	ind Cl	lear
 Responsible Organization 						Unassign F	ind Cl	lear
Short Name Z6ENG			Organization Type Workgroup					
Hierarchy Path \Organizations\Workgroups\Zo	ne 6 Engineer							
 Responsible Person 						F	ind Cl	lear



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DIRECTIONS:



To update **Responsible Organization**, locate the **Responsible Organization** section on the **General** tab:

4a

From the Responsible Organization section, click on the ${\bf Find}$ button.

Responsible Organization		Assign Auto-/ 4a	Find	Clear
Short Name	Organization Type		_	
Hierarchy Path				

The Find Organizations pop-up window will appear:



Use the Related Reports drop down menu and select Work Groups.

	OK Export Cancel
Related Reports	Departments by Path
Contains	External Companies My Companies Work Groups
 (GES) GLOI EXPERIENC SPECIALIST INC 	E 0000134389 \Organizations\Vendors\(GES) GLOBAL EXPERIENCE SPECIALISTS INC



Mark the radio button of the Work Group you wish to assign.

Then, click on the **Ok** button to assign.

				Add T	o Bookmarks	ОК	4d cport	Cancel	
Relat	ed Reports	-Select-		Work	Groups	_	-		
> 1 /2		Export	54 total found	Apply Filters	Clear Filters		Show:	50 🗘	
! Name				ID		Ту	pe		
	Contain	ns		Cor	ntains	Co	ontains		
0	Central	Auto Mechar	lic	104	2847	Wo	rkgroup		
۲	Central	Carpenter		104	2848	Wo	rkgroup		
0	Central	Contractor Custodian		104	1042885		Workgroup		
\odot	Central	Contractor E	levator	104	2886	Wo	rkgroup		
\odot	Central	Contractor E	xterminator	104	2887	Wo	rkgroup		
	Central	Custodian		104	2849	Wo	rkgroup		
0	Central	DDC		104	2852	Wo	rkgroup		
		an		10.0	0.05.0				



OPERATIONS & MAINTENANCE

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DIRECTIONS:



5

5a

5b

5c

Continued.

4e

Click on the Save button to confirm the Responsible Organization.

General	Job Cost	Work Details	Resources	Procedures	Notifications	Notes & Documents	• >	Supervisor Complete	H4e	Save	Save & Close	More 🗸
(Required): Us	e this tab to	enter, review,	or change ba:	sic information	about the task							
Gener	al								Accept	Start W	ork St	op Work
	Task ID	WT-1028074					Status /	ctive				
-	Tank Manager 1	ACT 4030074 C	chodulod We	al. DH Carry	ective Maintena		- L Chattan	and so and				
*	ask Name	W1-1020074 - 5	chequied we	rk, , PM Corre	ective maintena	ance Assignme	nt Status /	ssigned				
						rd (37.5%) and Morto		ssigned				
								usignea				

To update the Work Task Resources:

First, click on the **Resources** tab.

Vork Task: WT-1027927-WT-1027927 - Capital Project, , General Repairs & Maintenance Other	📲 Add To Bookmarks 🛛 🔒 Print 🛛 🥹 Help
General Job Cost w 5a Resources ures Notifications Notes & Documents Work Task Info Audit Act	ions Baseline Activate Save Save & Close Mor
(Required): Use this tab to enter, review, or change basic information about the task.	
- General	Accept Start Work Stop Work
Task ID WT-1027927 Status I	Draft
* Task Name WT-1027927 - Capital Project, , General Repairs & Maintenance Other Assignment Status	
Description Really dirty please clean	

Next, click on Find People.

JFK Task: W1-1028062-W	T-1028062 - Maintenance Project, 2020 Ridge	, Estimate Request		Add To Bookmark	s 📇 Print 🕐 P
General Job Cost Wor	k Details Resources Procedures Notification	is Notes & Documents Work Task Info Audit Actions		Supervisor Complete Hold Save Save & Cl	ose More
Dptional): Use this tab to e Resources	enter, review, or change resource assignments f	or the selected task.	5b _es Find People	Find Organization Time Entry Quick Add Time E	ntry Remove
0 total found					Show: 10
		Resource Requirement	Percent Allocated	Complete	

The Find People pop-up window will appear:

Use the **Related Reports** drop down menu and select **All People**.

				OK Export Car
elated Reports	-Select-	People in Responsible Organization		
	ill People	s Show More Filters		Show: 50
	Project Contact List	Last Name	First Name	Name
Contain		Contains	Contains	Contains
1013870	0	Airth	Scott	Airth,Scott W
cca4268	8	Campos	CJ	Campos,CJ
1019091	1	Elbe	Jeffrey	Elbe, Jeffrey S
1092235	5	Emanuel	Joshua	Emanuel, Joshua J
1104051	1	Goldstein	Evan	Goldstein, Evan L
2263297	7	Harris	Kevin	Harris, Kevin Eugene
1041818	8	Hayworth	Scott	Hayworth, Scott Robert



OPERATIONS & MAINTENANCE

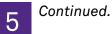
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DIRECTIONS:

5d

5e



Then, mark the checkbox next to the name of the individual(s) you wish to assign as a Resource.

Then, click on the **Ok** button to assign. Repeat **5c** and **5d** as necessary for multiple individuals.

Related Reports -Select-	All People		Add To Bookmarks OK Exp 50 Cancel
Export 1 total found Apply Filters Clear Filter Primary Organization Contains	s Show Less Filters Type Contains		show: 50 \$
d ! HR ID	Last Name	First Name	Name
Contains	Ridge	Matthew	Contains
<u>mrx2009</u>	Ridge	Matthew	Ridge, Matthew



Click on the **Save** button to confirm the assignment(s).

General Job Cost Work Details Res	ources Procedures Notifications Not	tes & Documents Work Task Info Audit Action	s Supervisor Complete Hol	d Save s₂ 5f Close More x
(Optional): Use this tab to enter, review, or o	change resource assignments for the selected	d task.		
Resources		Find Assets	Find People Find Locations Find Org	anization Time Entry Remove
Export 1 total found				Show: 10 \$
Name !	Resource Type	Resource Requirement	Percent Allocated	Complete
Christin, Brittany	Person	Required	<u>100 pe</u>	ercent

TIP & TRICKS

Utilize the column headers and search bars to narrow your search. Searching by first and last name, sorted by **All People** is most effective way to locate a resource.