

CUSTOMER SERVICE

CUSTOMER SERVICE: TASKS SCREEN

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

▼ GETTING STARTED

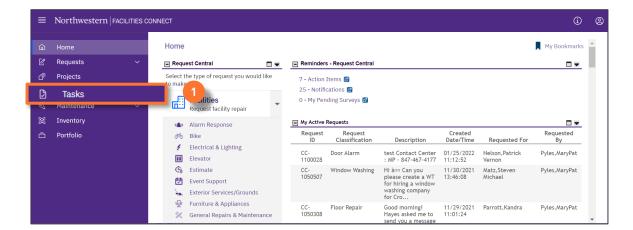
The **Tasks** screen in accessed through the left navigation pane – for instructions on logging into Facilities Connect, please refer to the job aid **Customer Service: FC Access and Home Screen**.

DIRECTIONS:

1	

From the **Facilities Connect** home screen:

Click on the **Tasks** section.



2

The Tasks screen contains information and reports regarding individual Work Tasks.

Tasks	T A	dd to Bookmarks 🛛 📕 My Bookmarl
🖃 Reminders - Tasks 🛛 🗖 🖝	🖃 My Active Tasks	🖃 Job Cost Facilities Reports 🛛 🗖
 Notices My Team's Tasks 16 - Unassigned Tasks 6 69 - Overdue Tasks 6 	I Task ID Task Name Task Description Task Type Request Class Task Priority Building Name No data to display. • • • • •	Employee-Organization Report 🛿 Project Costing Audit Report 🙆 Work Order Audit Report 🛐
0 - Tasks Due This Week 🗃 69 - All Open Tasks 🗟 46 - Over-Budget Tasks 🖻	My Trask History □ ▼ ! Task ID Task Name Request ID Request Class Priority Requested By Building No data to display.	■ Job Cost User Reports ■ Job Cost Summary and Detail Re
1 - Emergency Tasks 🖻 0 - Callback Tasks 🖻 0 - Poor Satisfaction Tasks 🖻 56 - Active Requests For My Ti	My Organization's Active Tasks Tasks On Hold For Parts	O&M Reports All Tasks by Resource Daily Work Orders Report
▶ My Tasks Create Task Create Unavailable Time	Tasks on Hold for Resource Locate Locate: 219502 Add To Bookmarks Print Help	EVCUST and CHCUST Open Work Campus Mapping 🗃 Notification History 🗈
All Tasks 💿	Done x	



CUSTOMER SERVICE

CUSTOMER SERVICE: TASKS SCREEN

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.
 - 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.

	Tasks						+	Add to Bookm	marks 🛛 📕 My Bookmark	s
	Reminders - Tasks	Hy Active Tas			De sur et d'au	Task Prior			🗆 👻 ties Reports 🔳 👻	
	Notices	No data to displ		Request ID	Request Class	Task Prior	ity Requested By Building Floor	Work Locatio	anization Report	3
	 My Team's Tasks 						_		g Audit Report 🖻	
1	16 - Unassigned Tasks 🚳							, Work C	Order Audit Report 👩	
	69 - Overdue Tasks 🖻 3b	🖃 My Task Histo	ry							
	0 - Tasks Due This Wee	I Task ID	Task Name	Request I	D Request Clas	s Priority	Requested By Building Floor	Work Location	n Reports 🛛 🗖 🖛	
	69 - All Open Tasks 🔯	No data to displ	ay.						and Detail Reg	
	46 - Over-Budget Tasks 🖻	4						• 500.00	ost summary and betait Kep	1
	1 - Emergency Tasks 📴	E My Organizat	ion's Active Tasks							
	0 - Callback Tasks 🖬 🕄 🔁			Request					<u> </u>	- 1
	0 - Poor Satisfaction Tasks 👩	! Task ID	Task Name	ID	Request Class	Priority	Requested By	Building	Floo esource	- 1
	0 - Poor Satisfaction Tasks 👩 56 - Active Requests For My Ti	WT-	WT-1027917 -	SR-	Request Class Elevator Other	Important	_Requested By cstGeneralRequestor2,cstGeneralRequestor2	Ch - Heating	<u>Floo</u> esource 💽 ders Report 🖻	
	56 - Active Requests For My T ► My Tasks		WT-1027917 - Important, Ch - Heating Plant,						esource 🖬	c
	56 - Active Requests For My Tr ► My Tasks Create Task S	WT-	WT-1027917 - Important, Ch -	SR-		Important	cstGeneralRequestor2,cstGeneralRequestor2	Ch - Heating Plant	ders Report	c
	56 - Active Requests For My Ti ▶ My Tasks Create Task Create Unavailable Time S	WT- 1027917	WT-1027917 - Important, Ch - Heating Plant, Elevator Other WT-1027918 - Maintenance	SR- 1000329	Elevator Other		cstGeneralRequestor2,cstGeneralRequestor2	Ch - Heating Plant	ders Report C HCUST Open Work	C
	56 - Active Requests For My Tr ► My Tasks Create Task S	WT- 1027917 WT-	WT-1027917 - Important, Ch - Heating Plant, Elevator Other WT-1027918 -	SR- 1000329 SR-	Elevator Other Estimate	Important Maintenance	cstGeneralRequestor2,cstGeneralRequestor2	Ch - Heating Plant John Evans	ders Report HCUST Open Work	¢
	56 - Active Requests For My Tr My Tasks Create Task 6 Create Unavailable Time 6 All Tasks 6	WT- 1027917 WT- 1027918 WT-	WT-1027917 - Important, Ch - Heating Plant, Elevator Other WT-1027918 - Maintenance Project, , Estimate Request WT-1027919 -	SR- 1000329 SR- 1000330 SR-	Elevator Other Estimate Request Fix/Replace	Important Maintenance	cstGeneralRequestor2,cstGeneralRequestor2	Ch - Heating Plant John Evans Alumni Ce	ders Report 🗃 HCUST Open Work ing வ story 🖬	¢
	56 - Active Requests For My Ti ▶ My Tasks Create Task Create Unavailable Time S	WT- 1027917 WT- 1027918	WT-1027917 - Important, Ch - Heating Plant, Elevator Other WT-1027918 - Maintenance Project, , Estimate Request	SR- 1000329 SR- 1000330	Elevator Other Estimate Request	Important Maintenance Project	cstGeneralRequestor2,cstGeneralRequestor2 cstGeneralRequestor2,cstGeneralRequestor2	Ch - Heating Plant John Evans Alumni Ce	ders Report 🗃 HCUST Open Work ing வ story 🖬	Υ.C.

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

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

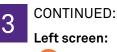
Tasks							Ť	Add to Bookm	arks	My Bool		
Reminders - Tasks	My Active Task	s						Job Co	st Faciliti	es Reports		
Notices	! Task ID	Employee-Organization R										
 My Team's Tasks 	No data to displa	No data to display. Project Costing Audit Report										
16 - Unassigned Tasks 🚳		Ay Task History										
69 - Overdue Tasks 👩	My Task Histor											
0 - Tasks Due This Week	I Task ID	Task Name Req	uest ID	Request	Class Pri	iority Requested By	Buildin	_	st User Re	eports		
69 - All Open Tasks 🔯	No data to displa	ay.										
46 - Over-Budget Tasks 🕻	4						1	Job Co	st Summ	ary and Deta		
1 - Emergency Tasks 🔯	∓ My Organizati	on's Active Tasks										
0 - Callback Tasks 🖻		on a Active Tuaka						O&M R	eports			
0 - Poor Satisfaction T		d For Parts										
56 - Active Requests For-	-y fi		Request	Request						Work		
My Tasks	1 Task ID	Task Name	ID	Class	Priority	Requested By		Building	Floor	Location		
Create Task 🔯	WT-	WT-1028106 - Urgent,	SR-	Room	Emergency	GeneralRequestor, Training		Technological	04	-A490A		
Create Unavailable Time 🖬	1028106	Technological Instit, Room Too Cold	1000534	Too Cold				Instit				
All Tasks 👩	WT-	WT-1028197 - Routine,	SR-	Fix	Routine	cstTechSupr_CARPENTER,Ca	rpenter	Sports &		Sports &		
-		, Fix Window Blinds	1000635	Window Blinds		Supervisor		Aquatic Cen		Aquatic Cen		
 Manage Tasks] -				······································				_	_		
Schedule Task 🖻	map):			-								
All Tasks 🖻	f Locate											
	Locate: 2242					1	Add To B	ookmarks 📇	Print (Help		
										×		



CUSTOMER SERVICE

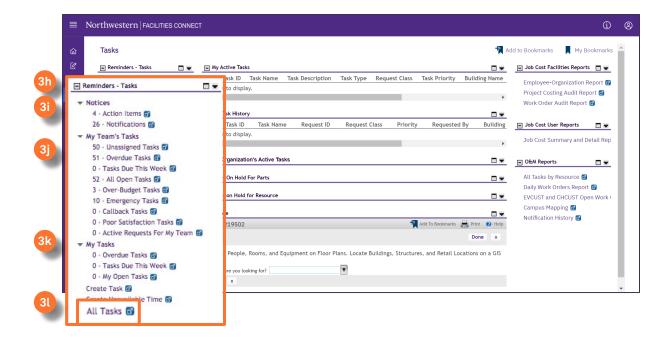
CUSTOMER SERVICE: TASKS SCREEN

DIRECTIONS:



3h

- Reminders Tasks: Preset and filtered Searches/Reports to assist in locating Work Tasks.
 - **Notices:** Action items or Notifications connected to Work Tasks or Services Requests related to you.
 - My Teams Tasks: Searches that include all Work Tasks assigned to your Workgroup.
 - **My Tasks:** Searches that include only the Work Tasks assigned to you.
 - All Tasks: all Work Tasks in Facilities Connect, regardless of status.





CUSTOMER SERVICE

CUSTOMER SERVICE: TASKS SCREEN

DIRECTIONS:



CONTINUED:

Right screen:

- Job Cost Facilities Reports
- Job Cost User Reports
- D&M Reports

