

### CUSTOMER SERVICE

# CUSTOMER SERVICE: TASKS SCREEN

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

#### ▼ GETTING STARTED

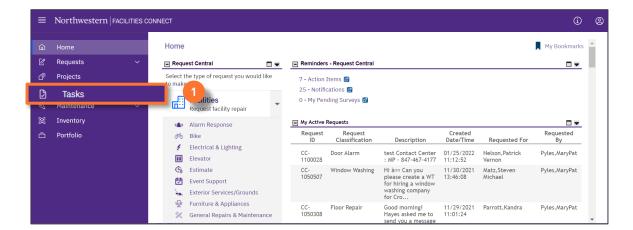
The **Tasks** screen in accessed through the left navigation pane – for instructions on logging into Facilities Connect, please refer to the job aid **Customer Service: FC Access and Home Screen**.

#### **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 🛛 🗖
<ul> <li>Notices</li> <li>My Team's Tasks</li> <li>16 - Unassigned Tasks 6</li> <li>69 - Overdue Tasks 6</li> </ul>	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 🛐
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▶ 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	



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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.
    - 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.

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**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.

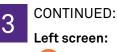
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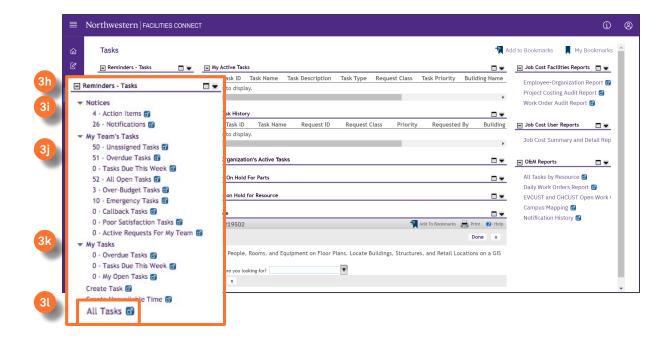
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#### DIRECTIONS:



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- 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

