



CUSTOMER SERVICE

# CUSTOMER SERVICE: TASKS SCREEN

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

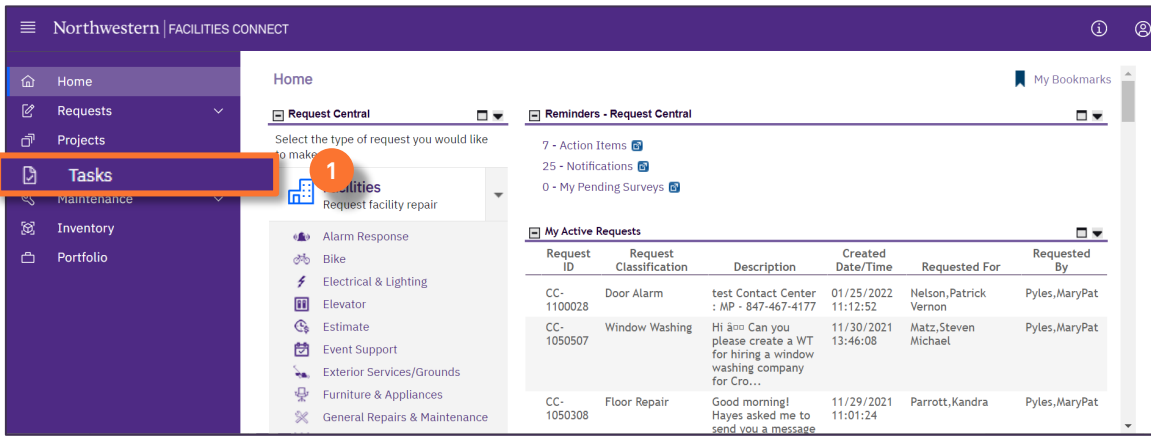
## GETTING STARTED

The **Tasks** screen is 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**.

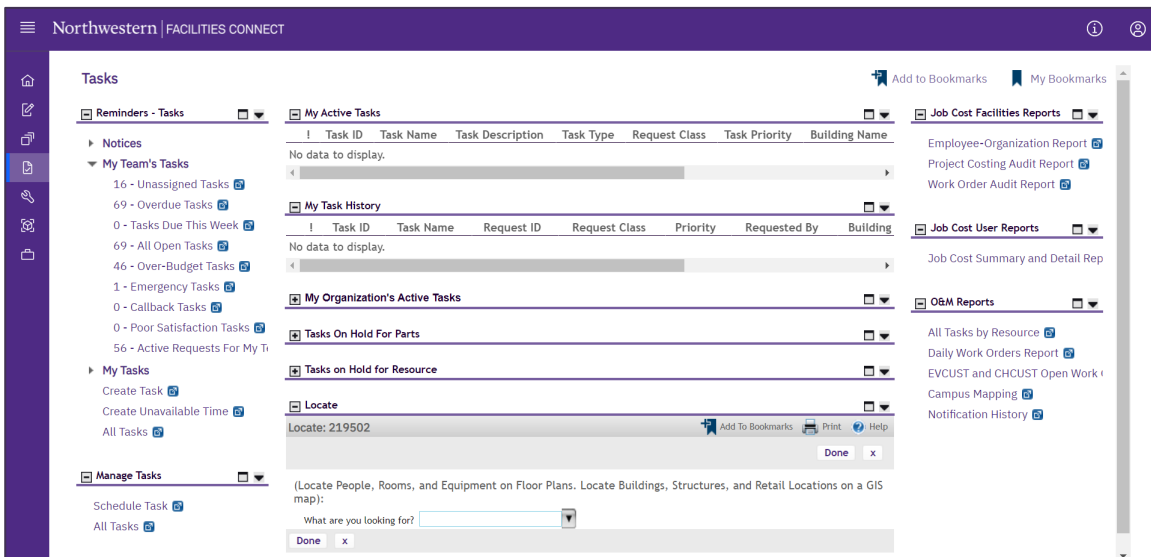
## DIRECTIONS:

**1** From the **Facilities Connect** home screen:

**1** Click on the **Tasks** section.



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





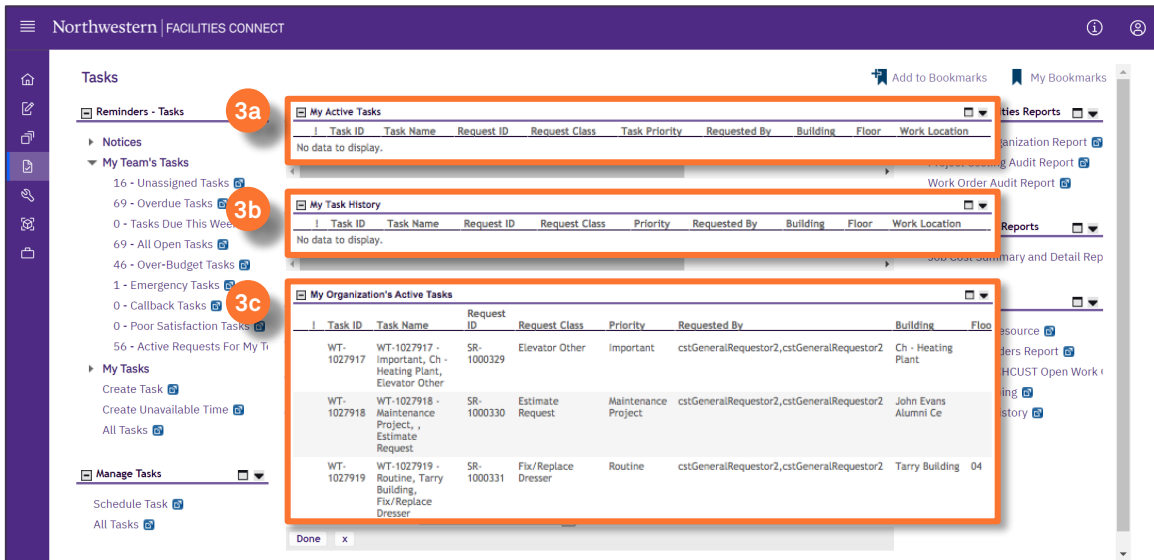
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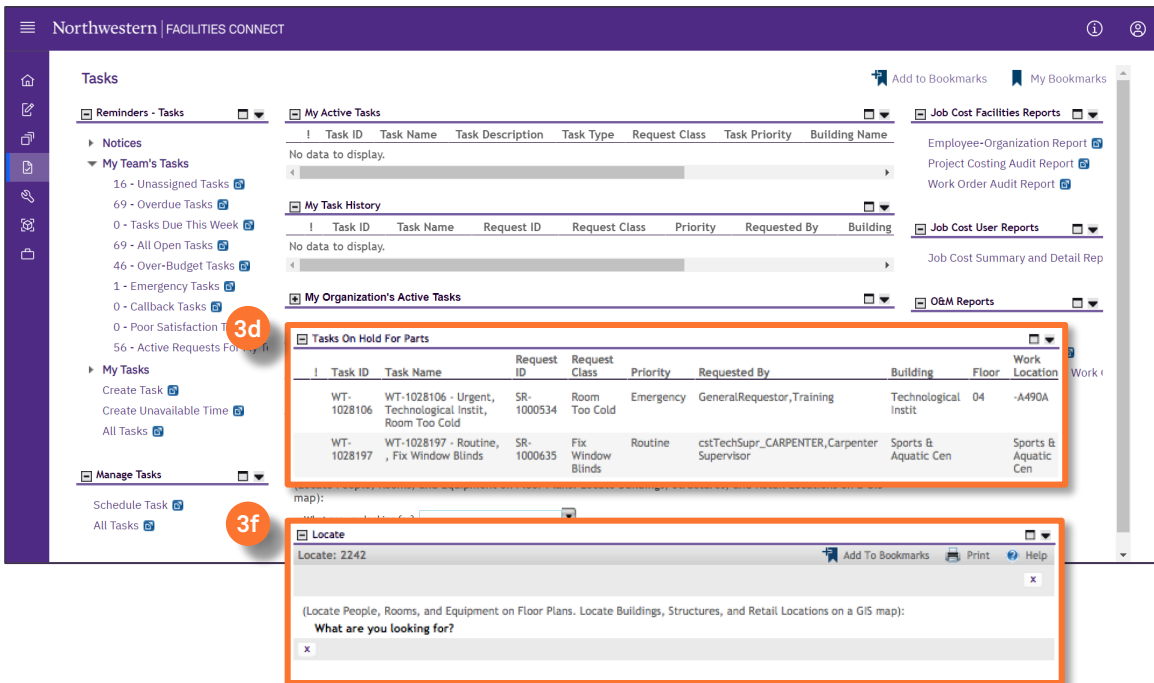
DIRECTIONS:

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.
- 3b **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.



- 3d **Tasks on Hold for Parts:** All Work Tasks that have been put on Hold and are awaiting parts before continuing work.
- 3f **Locate:** Search function to locate Buildings, Floor Plans, Rooms, or Equipment on the GIS Map.





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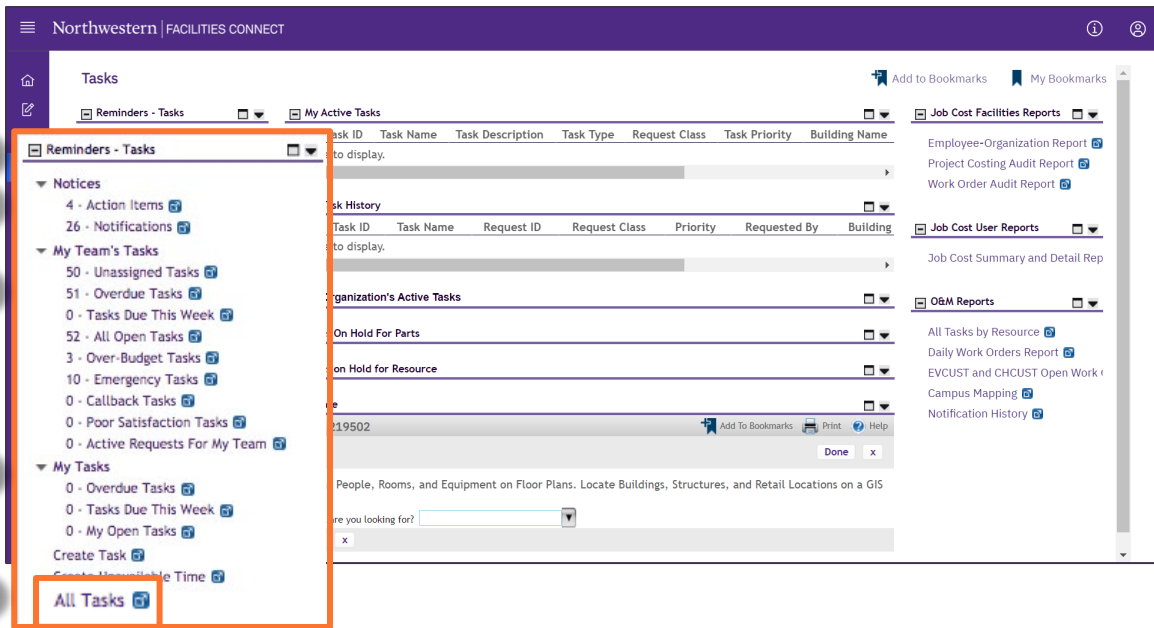
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DIRECTIONS:

**3** CONTINUED:  
Left screen:

- 3h Reminders – Tasks:** Preset and filtered Searches/Reports to assist in locating Work Tasks.
- 3i Notices:** Action items or Notifications connected to Work Tasks or Services Requests related to you.
- 3j My Teams Tasks:** Searches that include all Work Tasks assigned to your Workgroup.
- 3k My Tasks:** Searches that include only the Work Tasks assigned to you.
- 3l All Tasks:** all Work Tasks in Facilities Connect, regardless of status.

- 3h
- 3i
- 3j
- 3k
- 3l





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DIRECTIONS:

3

CONTINUED:

Right screen:

3f Job Cost Facilities Reports

3g Job Cost User Reports

3h O&M Reports

The screenshot shows the 'Tasks' screen in the Northwestern Facilities Connect system. The interface includes a left-hand navigation menu with categories like 'Reminders - Tasks', 'My Team's Tasks', 'My Tasks', and 'Manage Tasks'. The main content area is divided into several sections: 'My Active Tasks', 'My Task History', 'My Organization's Active Tasks', 'Tasks On Hold For Parts', 'Tasks on Hold for Resource', and 'Locate'. A right-hand sidebar contains report sections: 'Job Cost Facilities Reports', 'Job Cost User Reports', and 'O&M Reports'. Three callouts are present: '3f' points to the 'Job Cost Facilities Reports' section, '3g' points to the 'Job Cost User Reports' section, and '3h' points to the 'O&M Reports' section. The 'Job Cost Facilities Reports' section lists reports such as 'Billed Labor Detail Report', 'Incurred Labor Detail Report', 'Project Costing Audit Report', 'Revenue Analysis for Capital Projects', 'Revenue Analysis of Work Task Job Cost', and 'Work Order Audit Report'. The 'Job Cost User Reports' section shows 'Job Cost Summary and Detail Report - Summa'. The 'O&M Reports' section lists 'Daily Work Orders Report', 'EVCUST and CHCUST Open Work Orders Report', and 'Time Entries Pending Approval'.