



CUSTOMER SERVICE

MODIFY WORK TASKS: ASSIGN RESOURCE(S)

Provides guidance for assigning resources to a Facilities Connect Work Task.

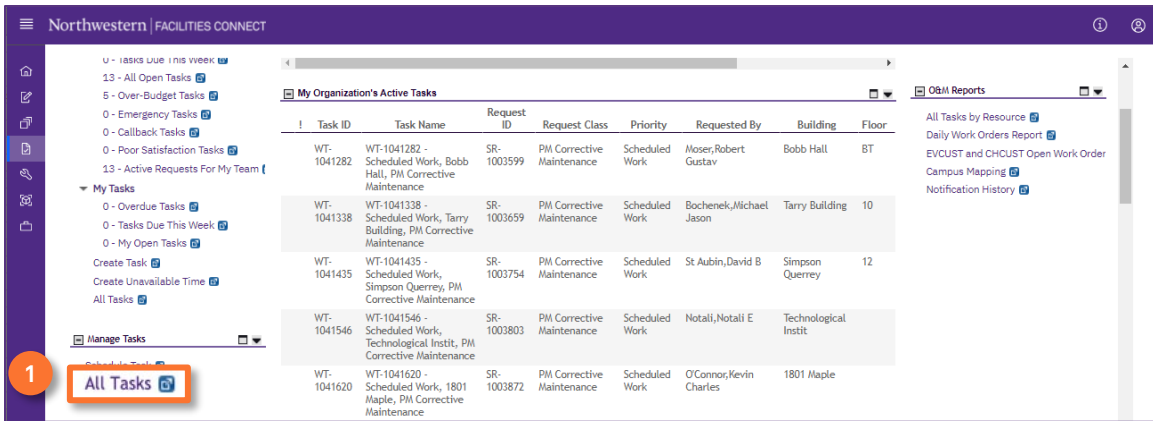
▼ GETTING STARTED

This job aid begins on the **Tasks** screen. For more information on navigating to the **Tasks** screen, please refer to the **Customer Service: Tasks Screen** job guide.

DIRECTIONS:

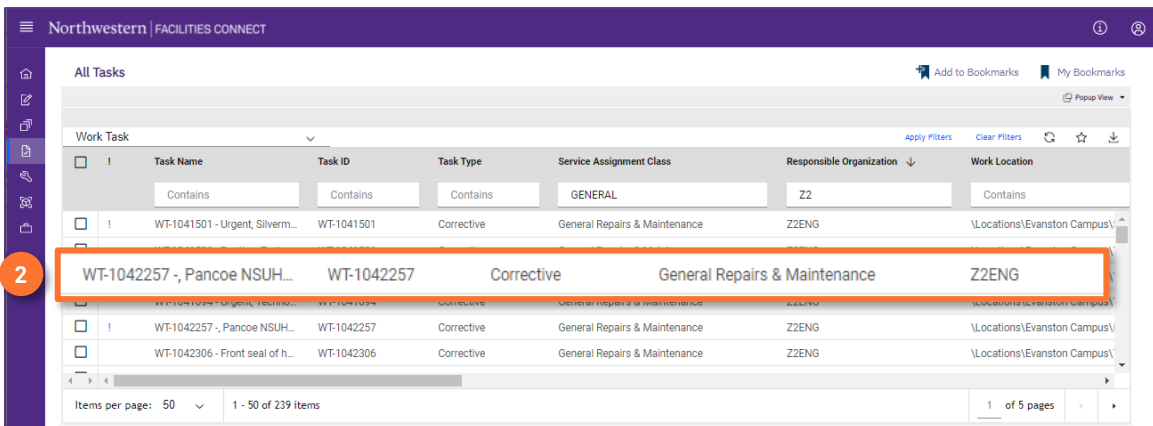
1 From the **Tasks** screen, scroll down to locate the **Manage Tasks** section:

1 Click on the **All Tasks** menu option.



2 Upon clicking, the **All Tasks** screen will open:

2 Locate and click the Work Task you wish to view.



▼ TIP & TRICKS

Utilize the column filters and search function to locate the Work Task you wish to view. Layering your filters will make it easier to locate the Work Task.



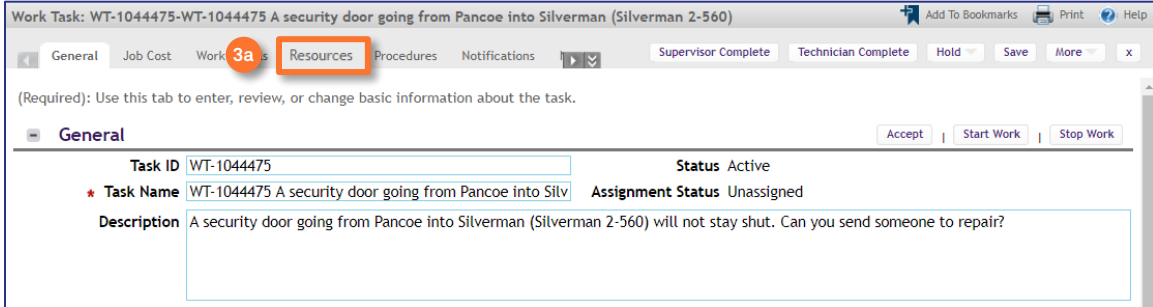
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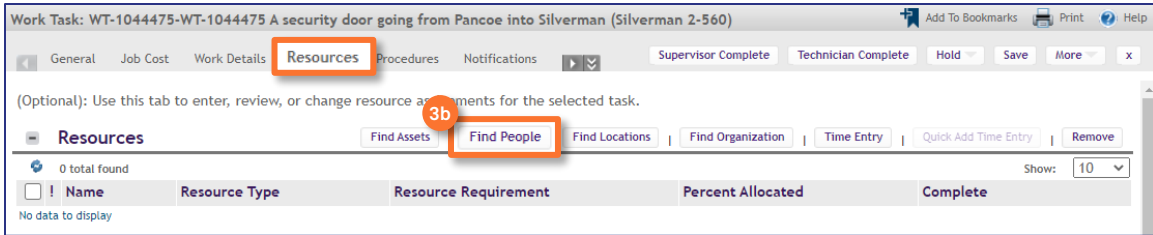
DIRECTIONS:

3 To Assign Resources on the work task:

3a Click on the **Resources** tab.

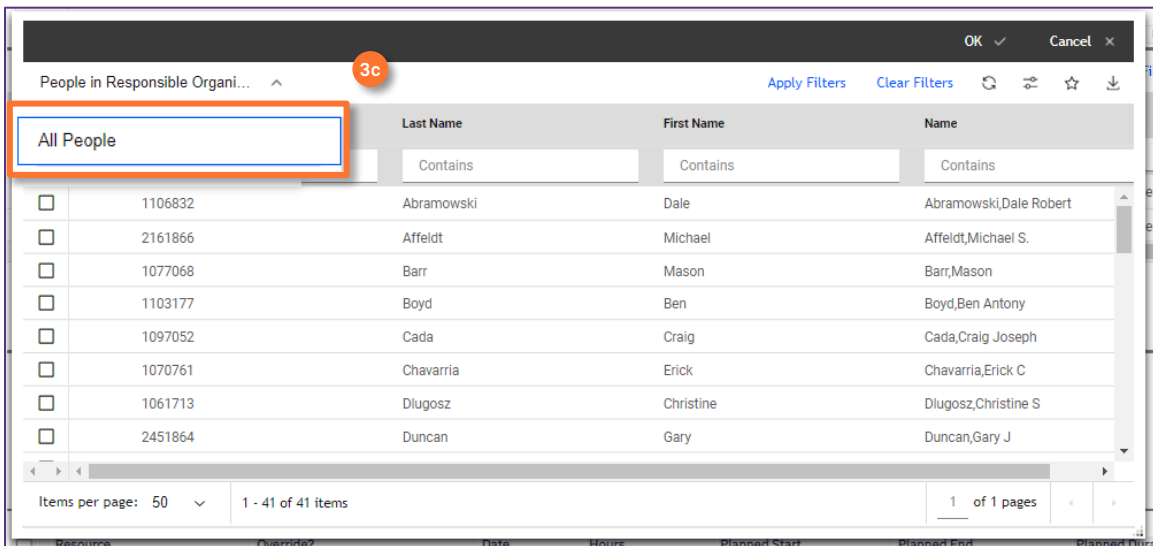


3b Next, locate and click on the **Find People** option.



The **Find People** pop-up window will appear:

3c Click on the **Related Reports** drop down menu arrow and select the **All People** option to search all available **Resources**.





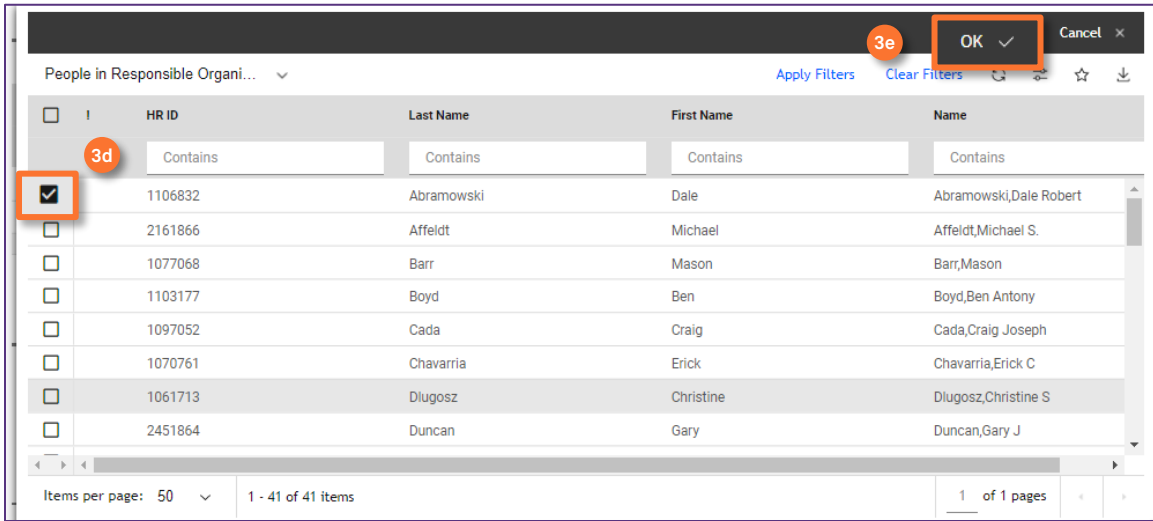
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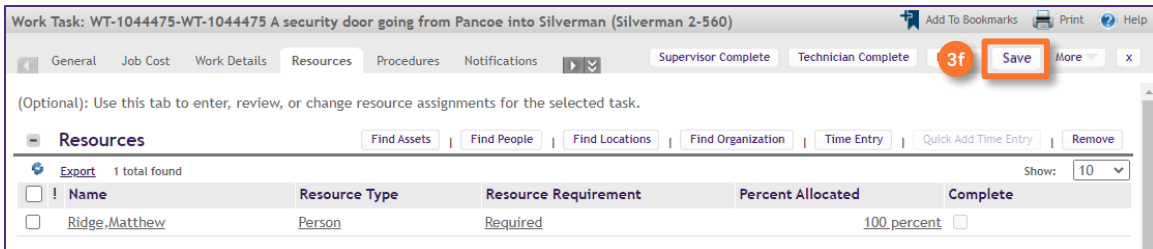
DIRECTIONS:

3 Continued.

- 3d Mark the **Checkbox** beside the name of the individual(s) you wish to assign as a **Resource**.
- 3e Then, click on the **Ok** button to assign. Repeat 3c through 3e as necessary for multiple individuals.



- 3f Click on the **Save** button to confirm the assignment(s).



▼ 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.