



CUSTOMER SERVICE

MODIFY WORK TASKS: UPDATE RESPONSIBLE ORGANIZATION

Provides guidance for updating the responsible organization on a Facilities Connect Work Task.

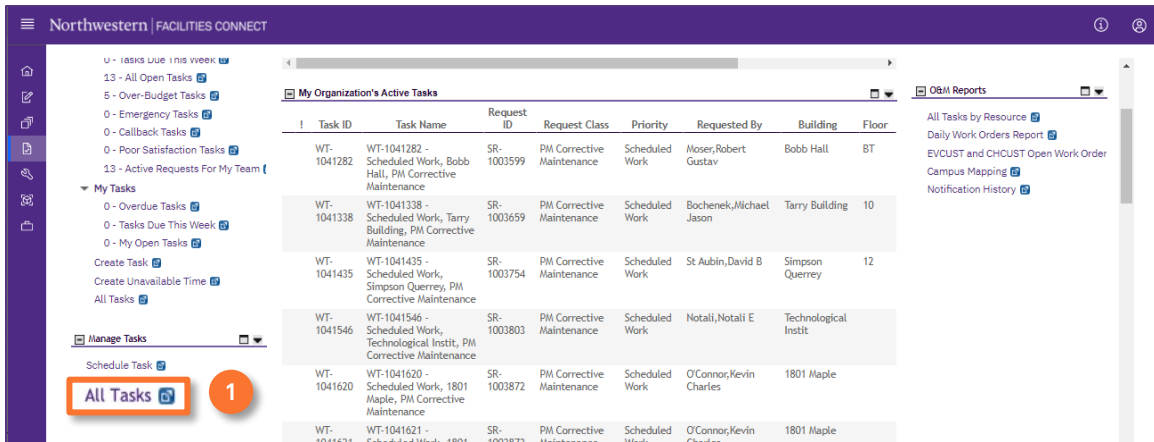
▼ GETTING STARTED

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

DIRECTIONS:

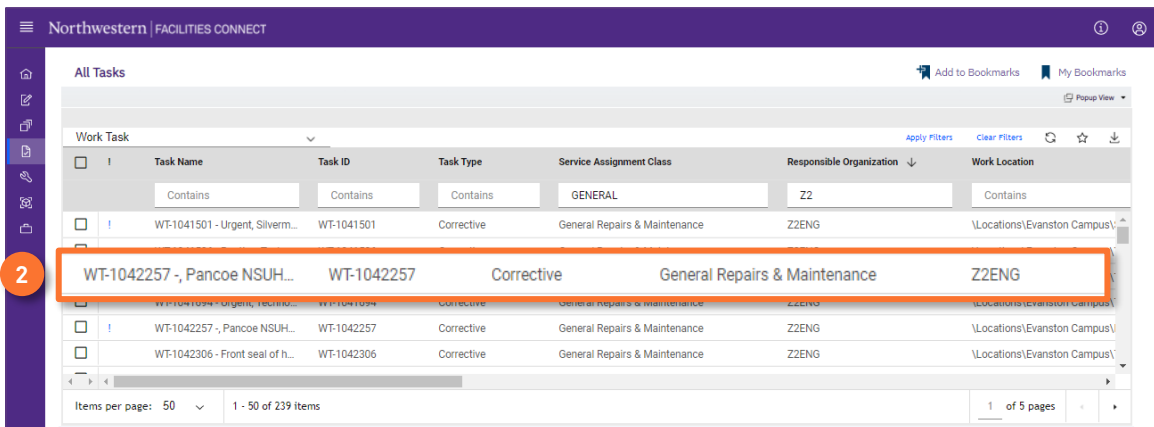
1 From the **Tasks** tab, scroll down to locate the **Manage Tasks** section:

1 Click **All Tasks**.



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

3a From the Responsible Organization section, click on the **Find** button.

Responsible Organization

Assign | Auto- 3a Find Clear

Short Name	Organization Type
Hierarchy Path	

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

3b Use the drop down menu and select **Work Groups**.

Organizations

Apply Filters Clear Filters

Departments Hierarchy Path

My Companies contains

Work Groups 3b

<input type="radio"/>	IOLANI SCHOOL	0000162773	\Organizations\Vendors\IOLANI SCHOOL
<input type="radio"/>	(GES) GLOBAL EXP...	0000134389	\Organizations\Vendors\GES) GLOBAL EXPERIENCE SPECIALISTS, INC
<input type="radio"/>	/N SOFTWARE INC.	0000215717	\Organizations\Vendors\N SOFTWARE INC.
<input type="radio"/>	1 BEYOND, INC.	0000105587	\Organizations\Vendors\1 BEYOND, INC.

3c Mark the radio button of the **Work Group** you wish to assign.

3d Then, click on the **Ok** button to assign.

Work Groups

Apply Filters Clear Filters

Name	ID	Type	
Contains	Contains	Contains	
<input type="radio"/>	Central Auto Mechanic	1042847	Workgroup
<input checked="" type="radio"/>	Central Carpenter	1042848	Workgroup
<input type="radio"/>	Central Contractor Custodian	1042885	Workgroup

3c

3d OK Cancel



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DIRECTIONS:

3

Continued.

3e Click on the **Save** button to confirm the **Responsible Organization**.

The screenshot shows a web application interface for managing work tasks. At the top, there are several tabs: General, Job Cost, Work Details, Resources, Procedures, Notifications, and Notes & Documents. The 'General' tab is selected. In the top right corner, there are buttons for 'Supervisor Complete', 'H 3e', 'Save', 'Save & Close', and 'More'. The 'Save' button is highlighted with a red box. Below the tabs, there is a message: '(Required): Use this tab to enter, review, or change basic information about the task.' Underneath, there is a 'General' section with a minus sign icon. To the right of this section are buttons for 'Accept', 'Start Work', and 'Stop Work'. The main content area contains the following information:

Task ID	WT-1028074	Status	Active
★ Task Name	WT-1028074 - Scheduled Work, , PM Corrective Maintenance	Assignment Status	Assigned
Description	maintain fire control panel shared by Searle (54.5%), Ward (37.5%) and Morton (8%)		