

PUT A WORK TASK ON ACCOUNTING HOLD

Provides guidance on how to put a work task on Accounting Hold in Facilities Connect.

DIRECTIONS:

1 From the **Facilities Connect Home Screen**:

1 Click on **Tasks** section.

The screenshot shows the Facilities Connect Home Screen. The left sidebar contains navigation options: Home, Requests, Projects, **Tasks** (highlighted with a red box and a red circle with the number 1), Inventory, and Portfolio. The main content area is titled 'Home' and includes sections for 'Request Central', 'Reminders - Request Central', 'My Active Requests', and 'My Completed Requests'. The 'My Active Requests' section contains a table with the following data:

Request ID	Request Classification	Description	Created Date/Time	Requested For	Requested By
SR-1005053	Electrical & Lighting Other	SW0004095 - 345 - TRANSFORMER MAINTENANCE	03/15/2020 20:44:22	Nguyen,Ngoc Anh	Nguyen,Ngoc Anh
SR-1004704	Pressurization/Air Flow Issue	SW0002715 - ASSIST CHELEC WITH VFD MAINTENANCE	03/13/2020 10:10:05	Nguyen,Ngoc Anh	Nguyen,Ngoc Anh
SR-1000162	General Repairs & Maintenance Other	WO720170-AHU-1 VFD HEAT SINK OVER TEMP ALARM	02/19/2020 09:20:38	Nguyen,Ngoc Anh	Nguyen,Ngoc Anh

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

2 Click on the **All Tasks** report.

The screenshot shows the Facilities Connect Tasks screen. The left sidebar contains navigation options: Home, Requests, Projects, **Tasks** (highlighted with a red box and a red circle with the number 2), Inventory, and Portfolio. The main content area is titled 'Tasks' and includes sections for 'Reminders - Tasks', 'My Active Tasks', 'My Task History', 'My Organization's Active Tasks', and 'Tasks On Hold For Parts'. The 'My Organization's Active Tasks' section contains a table with the following data:

Task ID	Task Name	Request ID	Request Class	Priority	Requested By	Building
WT-1050295	WT-1050295 - Scheduled Work, 345 East Superior, PM Corrective Maintenance	SR-1011181	PM Corrective Maintenance	Scheduled Work	Zier,Kathleen Lynn	345 Superior
WT-1050329	WT-1050329 - Scheduled Work, Morton Medical Resea, PM Corrective Maintenance	SR-1011219	PM Corrective Maintenance	Scheduled Work	Zier,Kathleen Lynn	Morton Medical Resea
WT-1050332	WT-1050332 - Scheduled Work, Lurie Resear, PM Corrective Maintenance	SR-1011222	PM Corrective Maintenance	Scheduled Work	Zier,Kathleen Lynn	Lurie Resear

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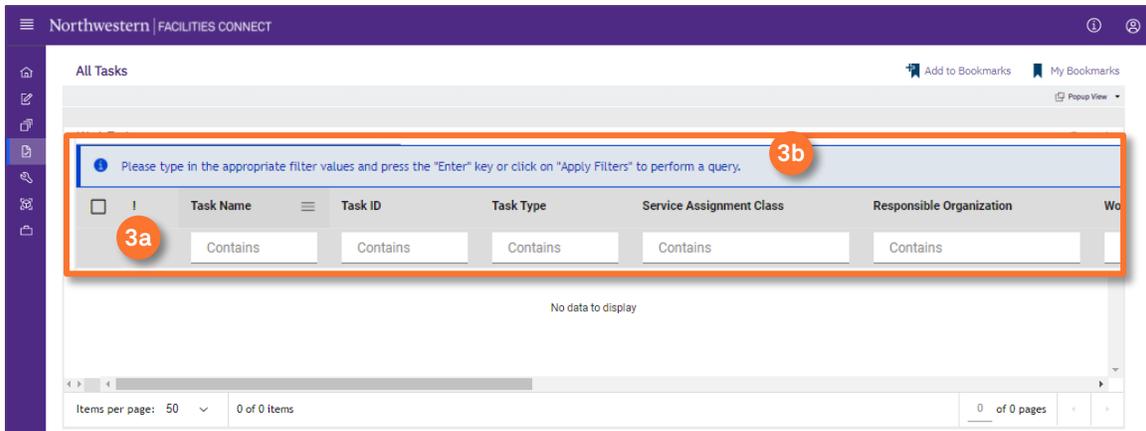
DIRECTIONS:

3

Upon tapping, the **All Tasks** screen will open. Because of the size of the report, the default view will be blank.

3a Enter criteria in any of the search fields beneath each of the column headers.

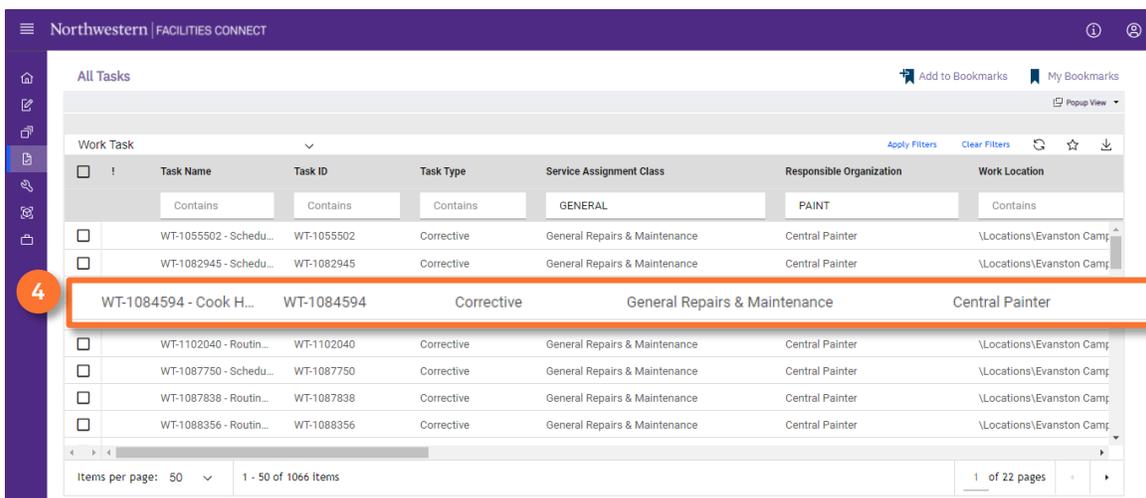
3b Initiate the search by pressing the **Enter** key.



4

Once you locate the appropriate **Work Task**:

4 Click on the **Task Name** to open.



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DIRECTIONS:

5 Upon clicking, the **Work Task record** will open in a new window:

5 Click on the **Job Cost** tab.

Work Task: WT-1028510-WT-1028510 - Routine, , Fix Window Blinds

Job Cost Details Resources Procedures Notifications Notes & Documents

(Required): Use this tab to enter, review, or change basic information about the task.

General Accept Start Work Stop Work

Task ID WT-1028510 Status Completed

* Task Name WT-1028510 - Routine, , Fix Window Blinds Assignment Status Completed

Description 2nd Crack w/multiple WGs

Task Reissue Reason

6 From the Job Cost tab:

6 Scroll down to the **Job Cost Billing** section.

Work Task: WT-1028510-WT-1028510 - Routine, , Fix Window Blinds

Job Cost Details Resources Procedures Notifications Notes & Documents

(Optional): Use this tab to enter, review, or change Job Cost information for this Task

Cost Summary

Total Time Log Cost	\$68.59	US Dollars	Total Invoice - Submitted	\$600.00	US Dollars
Total Material List Cost	\$0.00	US Dollars	Total Invoice - Paid	\$600.00	US Dollars
Total Inventory Consumable Cost	\$0.00	US Dollars	Total Material Order Cost	\$0.00	US Dollars
Total Inventory Assignable Cost	\$0.00	US Dollars			
Total PCard Line Item Cost	\$0.00	US Dollars			
Total PO Line Item Cost	\$600.00	US Dollars			
Total Service Provider Cost	\$0.00	US Dollars			
Total Cost	\$668.59	US Dollars			



6 Job Cost Billing

Billing Status Active

Job Cost Detail

Apply Filters Clear Filters

ID	Cost Source	Original Cost	Markup	Markup Cost	Allocation	Total Charged	Debit Chart String
No data to display							

Items per page: 10 0 of 0 items

1 of 1 pages

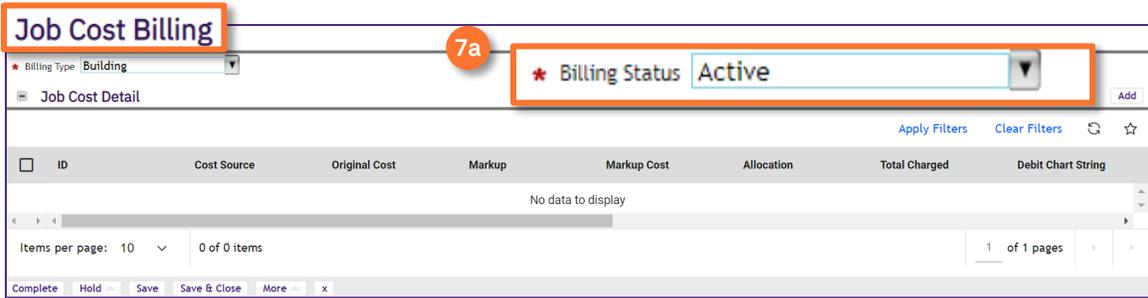


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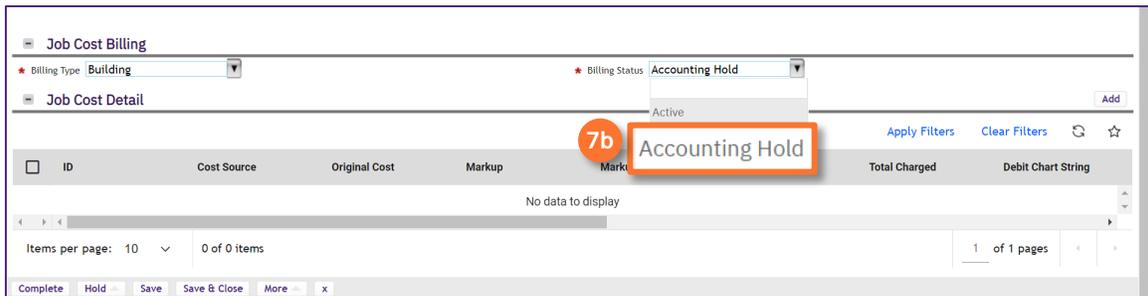
DIRECTIONS:

7 In the **Job Cost Billing** section:

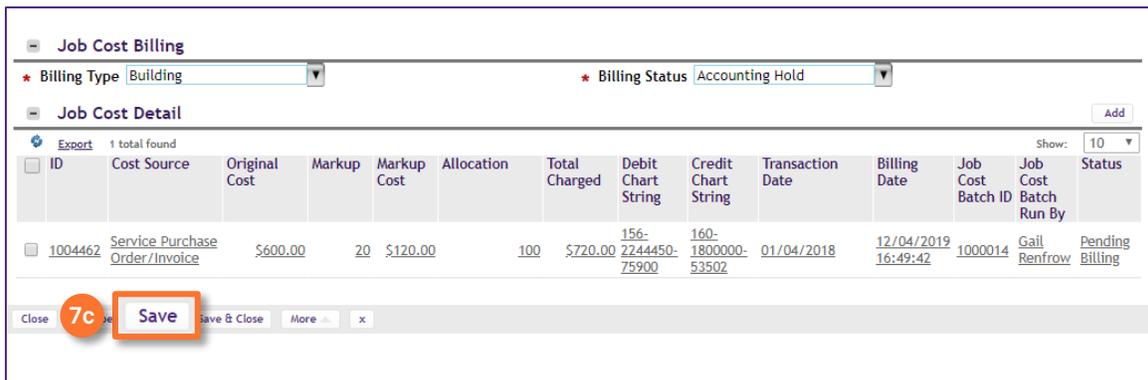
7a Click on the **Billing Status** drop down arrow.



7b Click on **Accounting Hold**.



7c Click on **Save**.



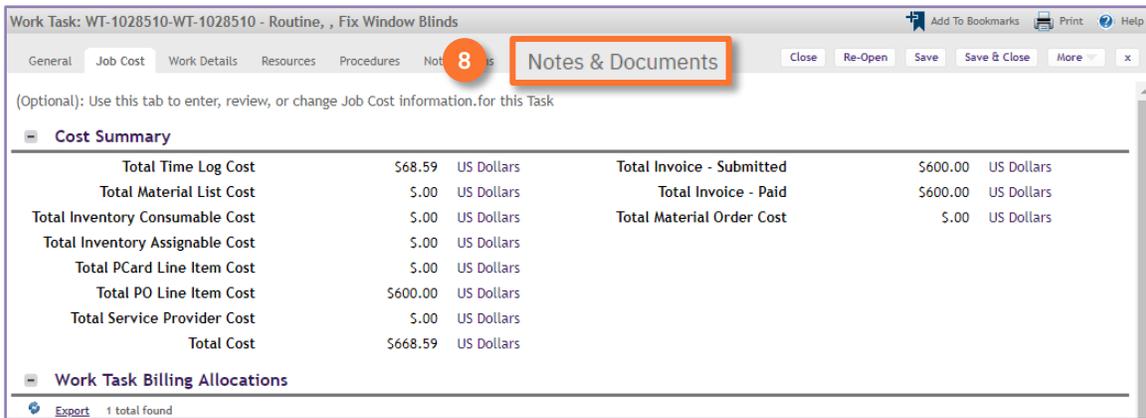


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DIRECTIONS:

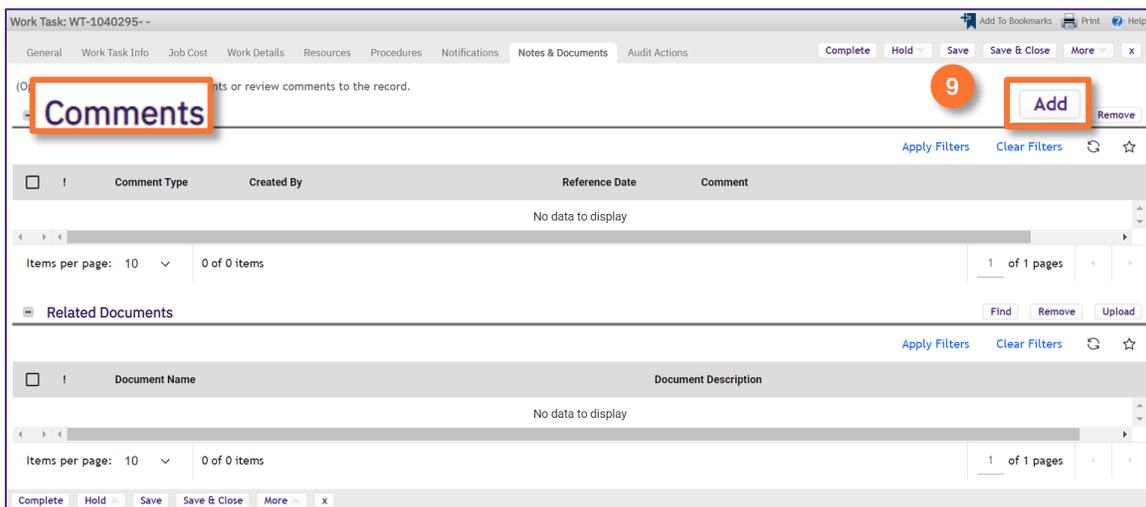
8 Next, document the reason you are placing this work task on account hold:

8 Click on the **Notes & Documents** tab.



9 From the **Notes & Document** screen, locate the **Comments** section:

9 Click on the **Add** button.



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DIRECTIONS:

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A new **Comment** window opens:

10a Type your comment.

10a Click on **Create**.

11

Upon clicking, the Comment window closes.

From the **Work Task** record:

11 Click on **Save & Close**.

Comment Type	Created By	Reference Date	Comment
Conversation	FinancialManager,Training	12/18/2019	Due to project retired/closed
Note	cstTechSupr_CARPENTER,Carpenter Supervisor	10/16/2019	Preferred Access Time: Anytime; Does Requester need to be Present During Visit: No
Resource Action	cstTechSupr_PAINTER,Painter Supervisor	10/16/2019	Because
Resource Action	cstTechSupr_PAINTER,Painter Supervisor	10/16/2019	comment