



Preventive Maintenance

# **BULK ACTIONS ON WORK TASKS**



## BULK ACTIONS ON WORK TASKS

### DOCUMENT SUMMARY

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This job guide provides step-by-step instruction for taking bulk actions with Work Tasks in Facilities Connect.

The purpose of this document is to serve as guided reference and/or new hire training on building Facilities Connect functionality.

### VERSION INFORMATION (THIS DOCUMENT)

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Version **1.1** Release Date **03/04/2022**  
 Owner **NU Facilities**  
 Version Notes **This is the original version of the document; content within represents delivered system functionality at Facilities Connect Operations and Maintenance go-live (2/5/2019), and has been verified as up-to-date of this document's release (03/04/2022)**

### REVISION HISTORY

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	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	08/10/2021	Created	NU Facilities
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GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to review, modify, and create **Work Tasks** as outlined in this job guide, the user **must**:
  - Possess the **Asset Manager** role and responsibilities

PROCESS

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Home

Reminders - Tasks

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Priority	Building Name
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Important	\Loc Carr
WT-1065572	WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance	test :	Corrective	PM Corrective Maintenance	Scheduled Work	2020 Ridge \Loc Carr

Manage Tasks

- Key Work Task
- Material Order Task
- Schedule Task
- All Tasks

My Task History

No data to display.

My Organization's Active Tasks

Task ID	Task Name	Request ID	Request Class	Priority	Requested By	Build
WT-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	Medium		Ryan Hal

Job Cost Facilities Reports

- Billed Labor Detail Report
- Incurred Labor Detail Report
- Work Order Audit Report

Job Cost User Reports

- Job Cost Summary and Detail Rep

O&M Reports

- All Tasks by Resource
- Daily Work Orders Report
- EVCUST and CHCUST Open Work
- Time Entries Pending Approval
- Campus Mapping



PROCESS

- 1) Begin on the **Facilities Connect Home Screen**.
- 2) Click on the **All Tasks** report under the Manage Tasks section.

<<Upon clicking, the All Tasks screen will open in the main window>>

INFORMATION

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Home

Reminders - Tasks

- Notices
- My Team's Tasks
- My Tasks
  - Create Task
  - Create Unavailable Time
  - All Tasks
- Manage Tasks
  - Key Work Task
  - Material Order Task
  - Schedule Task
  - All Tasks

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Priority	Building Name
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Important	\Loc Carr
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No data to display.

My Organization's Active Tasks

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Job Cost Facilities Reports

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▶ PROCESS

▼ INFORMATION

Note that when you arrive on the All Tasks report, it will be blank of information.

To populate the report, enter search criteria into the report OR use the **Clear Filters** option to load all information.

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All Tasks Add to Bookmarks My Bookmarks

Work Task Apply Filters **Clear Filters**

Please type in the appropriate filter values and press the "Enter" key or click on "Apply Filters" to perform a query.

Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization	Work Location
Contains	Contains	Contains	Contains	Contains	Contains

No data to display

Items per page: 50 0 of 0 items 0 of 0 pages



## PROCESS

To **COMPLETE** Work Tasks,

3) Click on the drop down menu.

4) Select the **Work Task – Issued** report.

## INFORMATION

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All Tasks

Work Task

ID	Task Type	Service Assignment Class	Responsible Organization	Work Location
042098	Contains	Contains	Contains	Contains
042098	Planned	Project	Z6PAINT	\Locations\Cl
070430	Corrective	Risk/Facilities	Central Engineer	\Locations\EV
040295	Preventive	Facilities	Central Carpenter	\Locations\EV
031429	Preventive	Facilities	Central Contract Elevator	\Locations\EV
039833	Preventive	Facilities		
<input type="checkbox"/>	- MONTHLY	WT-1039834	Preventive	Facilities
<input type="checkbox"/>	- MONTHLY	WT-1039835	Preventive	Facilities
<input type="checkbox"/>	- MONTHLY	WT-1039836	Preventive	Facilities
<input type="checkbox"/>	- MONTHLY	WT-1039837	Preventive	Facilities

Items per page: 50 1 - 50 of 55193 items 1 of 1104 pages



**PROCESS**

5) From this view, you will be able to narrow down your search by filtering for only the **Planned Task Type** or specific **Work Location**.

**INFORMATION**

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All Tasks

Related Reports:  Work Task - Issued

1 / 5 Export 208 total found Apply Filters Clear Filters

Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization	Work Location
<input type="checkbox"/> Contains	Contains	Planned	Contains	Contains	Evanston
<input type="checkbox"/> COMMENCEMENT 2021 RYAN FIELD LAND SUPPORT	WT-1075305	Planned	Grounds	Central Landscape	\\Locations\Evanston Cam
<input type="checkbox"/> COMMENCEMENT 2021 RYAN FIELD WASTE\RECYCLING SUPPORT	WT-1075306	Planned	Facilities	Central Waste	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Jacobs - COVID Testing Site	WT-1051881	Planned	Facilities	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - FMO TRAINING EVDDC NOVEMBER PER MCKINNEY	WT-1098788	Planned	Facilities	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Campus CHILLED WATER DIST. SYSTEM	WT-1043506	Planned	Temperature	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Campus HOT WATER DISTRIBUTION SYSTEM	WT-1043505	Planned	Temperature	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Campus READ WATER METERS	WT-1043504	Planned	Temperature	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Campus STEAM DISTRIBUTION SYSTEM	WT-1043507	Planned	Temperature	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Campus SYSTEM ALARM MONITORING	WT-1042321	Planned	Temperature	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Central DDC - SUPERVISION	WT-1044161	Planned	Event Support	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Central DDC - JOB PLANNING AND CONTRACT ADMINISTRATION	WT-1044268	Planned	Event Support	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Central DDC - MEETINGS	WT-1044201	Planned	Event Support	Central DDC	\\Locations\Evanston Cam
<input type="checkbox"/> EDDC - Standing WT - Central DDC - TIME SPENT AT SAFETY COMMITTEE MEETINGS	WT-1099762	Planned	Event Support	Central DDC	\\Locations\Evanston Cam



- PROCESS**
- Once you have your filters set, select the Work Tasks that you wish to Complete using the **checkboxes** on the left-hand side of the screen.
  - After selecting the Work Tasks, click the **Complete** button.

**IMPORTANT**

You will NOT be asked to confirm your selection once you click the **Complete** button. Please be careful in your selection.

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All Tasks

Add to Bookmarks My Bookmarks

Complete Copy Retire Revise

Related Reports -Select- Work Task - Issued

1 / 5 Export 208 total found Apply Filters Clear Filters Show: 50

<input type="checkbox"/>	Task Name	Task ID	Task Type	Service Assignment Class	Responsible Organization	Work Location
<input type="checkbox"/>	Contains	Contains	Planned	Contains	Contains	Evanston
<input checked="" type="checkbox"/>	COMMENCEMENT 2021 RYAN FIELD LAND SUPPORT	WT-1075305	Planned	Grounds	Central Landscape	\Locations\Evanston Cam
<input checked="" type="checkbox"/>	COMMENCEMENT 2021 RYAN FIELD WASTE\RECYCLING SUPPORT	WT-1075306	Planned	Facilities	Central Waste	\Locations\Evanston Cam
<input checked="" type="checkbox"/>	EDDC - Jacobs - COVID Testing Site	WT-1051881	Planned	Facilities	Central DDC	\Locations\Evanston Cam
<input checked="" type="checkbox"/>	EDDC - FMO TRAINING EVDDC NOVEMBER PER MCKINNEY	WT-1098788	Planned	Facilities	Central DDC	\Locations\Evanston Cam
<input checked="" type="checkbox"/>	EDDC - Standing WT - Campus CHILLED WATER DIST. SYSTEM	WT-1043506	Planned	Temperature	Central DDC	\Locations\Evanston Cam
<input type="checkbox"/>	EDDC - Standing WT - Campus HOT WATER DISTRIBUTION SYSTEM	WT-1043505	Planned	Temperature	Central DDC	\Locations\Evanston Cam
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<input type="checkbox"/>	EDDC - Standing WT - Campus SYSTEM ALARM MONITORING	WT-1042321	Planned	Temperature	Central DDC	\Locations\Evanston Cam
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<input type="checkbox"/>	EDDC - Standing WT - Central DDC - JOB PLANNING AND CONTRACT ADMINISTRATION	WT-1044268	Planned	Event Support	Central DDC	\Locations\Evanston Cam
<input type="checkbox"/>	EDDC - Standing WT - Central DDC - MEETINGS	WT-1044201	Planned	Event Support	Central DDC	\Locations\Evanston Cam
<input type="checkbox"/>	EDDC - Standing WT - Central DDC - TIME SPENT AT SAFETY COMMITTEE MEETINGS	WT-1099762	Planned	Event Support	Central DDC	\Locations\Evanston Cam