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:
   - Click on the Tasks section.

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

Right screen:

3f  Job Cost Facilities Reports

3g  Job Cost User Reports

3h  O&M Reports