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.

   ![Screen Capture](image)

2. Upon clicking, the All Tasks screen will open:
   2. Locate and click the Work Task you wish to view.

   ![Screen Capture](image)

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.

![Resources tab](image1)

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

![Find People option](image2)

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.

![Find People window](image3)
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DIRECTIONS:

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.