

***On-line Tutorial Series***

***Module Eight***

**Updating Tasks in a Record**

**Adding Workflow Task Comments**

**Viewing Closed Task Workflow Comments**

# The Workflow Process

**The workflow of a record refers to the set of tasks that is followed by DSD and Partnering Agencies to progress a record (application) from application in-take to closing.**

- ♦ **The Workflow functions as an automated to-do list for updating the Record.**

# Daily Task Card Assignments

## Updating Tasks in a Record

The screenshot displays a task management interface with a sidebar on the left and a main content area. The sidebar contains a search icon, a grid icon, and two record cards: 'LAND-16 -AMENDPL...' and 'LAND-PLAT -16-000015'. The main content area is titled 'Tasks' and shows 'Showing 6 task(s)'. Three task cards are visible:

- Preliminary Plan Review**: 1 HR, 7:00 AM, Wednesday, Jan 31. Location: Board Room. Assigned by: Patricia Rosas. Tasks: Land Entitlements, Admin Support.
- Application Intake**: Jan 24. Assigned by: gadgasd. Tasks: 1 Active, 0 Completed, 73 Total Tasks. ALT-ID: [LAND-PLAT-16-000015](#).
- Subdivision Review**: UNDER REVIEW, Jan 11. Assigned by: asdrasdf. Tasks: 1 Active, 4 Completed, 8 Total Tasks. ALT-ID: [PLAT-TIMEEXT-16-000038](#).

- 1. Click the hyperlink of the Task Assignment or the Record ID to access the Record.**

Record ID: PLAT-TIMEEXT-16-000038

Record  
Summary  
**Workflow**  
Workflow History  
Documents  
Address  
Parcel

### Workflow Tasks

MENU ▾ NEW SUPERVISOR HELP

Completed Task

In progress

**Subdivision Review** **Task banner** ASSIGNED Patricia Rosas  
0.0h STARTED By

Up Next

VIEW HISTORY

UNDER REVIEW  
DUE 01/11/2018

**2. Navigate to the Workflow Tab of the Record.**

**3. Click anywhere on the *In Progress* task banner hyperlink.**

Record ID: PLAT-TIMEEXT-16-000038

**Workflow Tasks**

MENU NEW SUPERVISOR HELP

Completed Task

In progress

Subdivision Review ASSIGNED Patricia Rosas  
STARTED by

0.0h

Task Details Sub Tasks

SUBMIT ASSIGN RESET CALCULATE HOURS HELP

Task Details - Subdivision Review	Due Date	Assigned Date	In Possession Time (hrs)
Current Status Under Review	01/11/2018	01/04/2018	

Assigned to Department: Land Entitlements Admin Support  
Assigned to: Patricia Rosas  
Status Date:

New Status \*  
--Select--

Due Date: 01/11/2018  
Status Date \*: 02/22/2018

Action By Department \* Current Department: Land Entitlements  
Action By \* Current User: Patricia Rosas

Comments  
Standard Comment

check spelling

Display Comment in ACA  Display E-mail Address in ACA

Comment Display in ACA  
 All ACA Users  
 Record Creator  
 Licensed Professional  
 Contact  
 Owner

Task Specific Information

No signature  No payment  Invalid address  
 Invalid Legal Description  Other

Comments

check spelling

VIEW HISTORY

UNDER REVIEW  
DUE 01/11/2018

## 4. The Task Details page displays.

The screenshot shows a web application interface for a workflow task. The record ID is PLAT-TIMEEXT-16-000038. The task is titled 'Subdivision Review' and is currently 'In progress'. The task is assigned to Patricia Rosas and started by her. The 'SUBMIT' button is highlighted with a red circle and the number 3. A 'New Status' dropdown menu is highlighted with a red circle and the number 2, showing '--Select--'. A text input field for comments is highlighted with a red circle and the number 1. The interface includes a sidebar with navigation options like Record, Summary, Workflow, and Workflow History. The main content area has a 'Task Details' section with fields for Current Status (Under Review), Due Date (01/11/2018), Assigned Date (01/04/2018), and In Possession Time (hrs). There are also fields for Action By Department (Land Entitlements Admin Support) and Action By (Patricia Rosas). A 'Comments' section has a 'Standard Comment' button and a text area. Below the comments section are checkboxes for 'Display Comment in ACA' and 'Display E-mail Address in ACA', and a 'Comment Display in ACA' section with checkboxes for 'All ACA Users', 'Record Creator', 'Licensed Professional', and 'Contact'.

**5. Type Workflow Task Comments (#1 shown).**

**6. Select New Status for Record (#2 shown).**

**7. Click Submit (#3 shown).**

Record ID: PLAT-TIMEEXT-16-000038

Record

Summary

**Workflow**

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

Payment

Payment History

In progress

Subdivision Review

ASSIGNED Patricia Rosas

STARTED by

0.0h

**Task Details** Sub Tasks

SUBMIT ASSIGN RESET CALCULATE HOURS HELP

Task Details - Subdivision Review

Current Status	Due Date	Assigned Date	In Possession Time (hrs)
Under Review	01/11/2018	01/04/2018	

Assigned to Department: Land Entitlements Admin Support

Assigned to: Patricia Rosas

Status Date

New Status \*  
--Select--

Due Date: 01/11/2018

Status Date \*: 02/22/2018

Action By Department \* Current Department: Land Entitlements A

Action By \* Current User: Patricia Rosas

Comments

Standard Comment

check spelling

Display Comment in ACA

Display E-mail Address in ACA

Comment Display in ACA

- All ACA Users
- Record Creator
- Licensed Professional
- Contact

UNDER REVIEW

DUE 01/11/2018

**Note: Workflow Comments typed in the Standard Comment field are viewable by Customer by default. To unselect, click the box to the left of Display Comment in ACA (shown).**

# Adding Workflow Task Comments

Adding Comments to a workflow task is different than adding an internal comment to a Record.

The screenshot shows a web interface for a workflow task. On the left is a navigation menu with items like 'Record', 'Summary', 'Workflow', 'Workflow History', 'Documents', 'Address', 'Parcel', 'GIS', 'Contacts', 'Custom Fields', 'Custom Lists', 'Inspections', 'Conditions', 'Conditions of Approval', 'Fee', 'Assess Fee History', 'Payment', and 'Payment History'. The 'Workflow' item is highlighted. The main content area is titled 'In progress' and shows details for a 'Subdivision Review' task. It includes buttons for 'SUBMIT', 'ASSIGN', 'RESET', 'CALCULATE HOURS', and 'HELP'. Below these are fields for 'Task Details - Subdivision Review', 'Current Status' (Under Review), 'Due Date' (01/11/2018), 'Assigned Date' (01/04/2018), 'Assigned to Department' (Land Entitlements Admin Support), 'Assigned to' (Patricia Rosas), and 'Status Date'. There are also dropdowns for 'New Status' and 'Action By Department', and date pickers for 'Due Date' and 'Status Date'. At the bottom, there is a 'Comments' section with a 'Standard Comment' text input field, a 'check spelling' button, and several checkboxes: 'Display Comment in ACA' (checked), 'Display E-mail Address in ACA' (unchecked), 'Comment Display in ACA' (checked), 'All ACA Users' (checked), 'Record Creator' (checked), 'Licensed Professional' (checked), and 'Contact' (checked).

Comments to workflow tasks are added while the task is updated.

Record ID: PLAT-TIMEEXT-16-000038

Record

Summary

**Workflow**

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

In progress

**Subdivision Review** ASSIGNED Patricia Rosas

0.0h STARTED by

**Task Details**

SUBMIT ASSIGN RESET CALCULATE HOURS HELP

Task Details - Subdivision Review

Current Status	Due Date	Assigned Date	In Possession Time (hrs)
Under Review	01/11/2018	01/04/2018	
Assigned to Department	Assigned to	Status Date	
Land Entitlements Admin Support	Patricia Rosas		
New Status *	Due Date	Status Date *	
--Select--	01/11/2018	02/22/2018	
Additional Information Received			
Additional Information Required			
Request to Director			
Request to Planning Commission			
Under Review			
Withdrawn			

Department Action By \* Current User

Patricia Rosas

Standard Comment

**Note: The New Status drop-down menu displays several update options for the task. New Status options are business process and record type dependent.**

Record

Summary

**Workflow**

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

New Status \*  
Additional Info ▼ **1**

Due Date  
01/11/2018

Status Date \*  
02/22/2018

Action By Department \* Current Department  
Land Entitlements A ▼

Action By \* Current User  
Patricia Rosas ▼

Comments  
Standard Comment

check spelling

Display Comment in ACA  Display E-mail Address in ACA

Comment Display in ACA  
 All ACA Users  
 Record Creator  
 Licensed Professional  
 Contact  
 Owner

Task Specific Information **2**

No signature  No payment  Invalid address  
 Invalid Legal Description  Other

Comments

check spelling

**Note: If the status of Additional Information Required is selected, then a reason must be checked in the Task Specific Information area. Task Specific Information areas are record type dependent.**

Record

Summary

**Workflow**

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

New Status \*  
Additional Info ▼

Due Date  
01/11/2018

Status Date \*  
02/22/2018

Action By Department \* Current Department  
Land Entitlements A ▼

Action By \* Current User  
Patricia Rosas ▼

Comments  
Standard Comment

check spelling

Display Comment in ACA  Display E-mail Address in ACA

Comment Display in ACA  
 All ACA Users  
 Record Creator  
 Licensed Professional  
 Contact  
 Owner

Task Specific Information

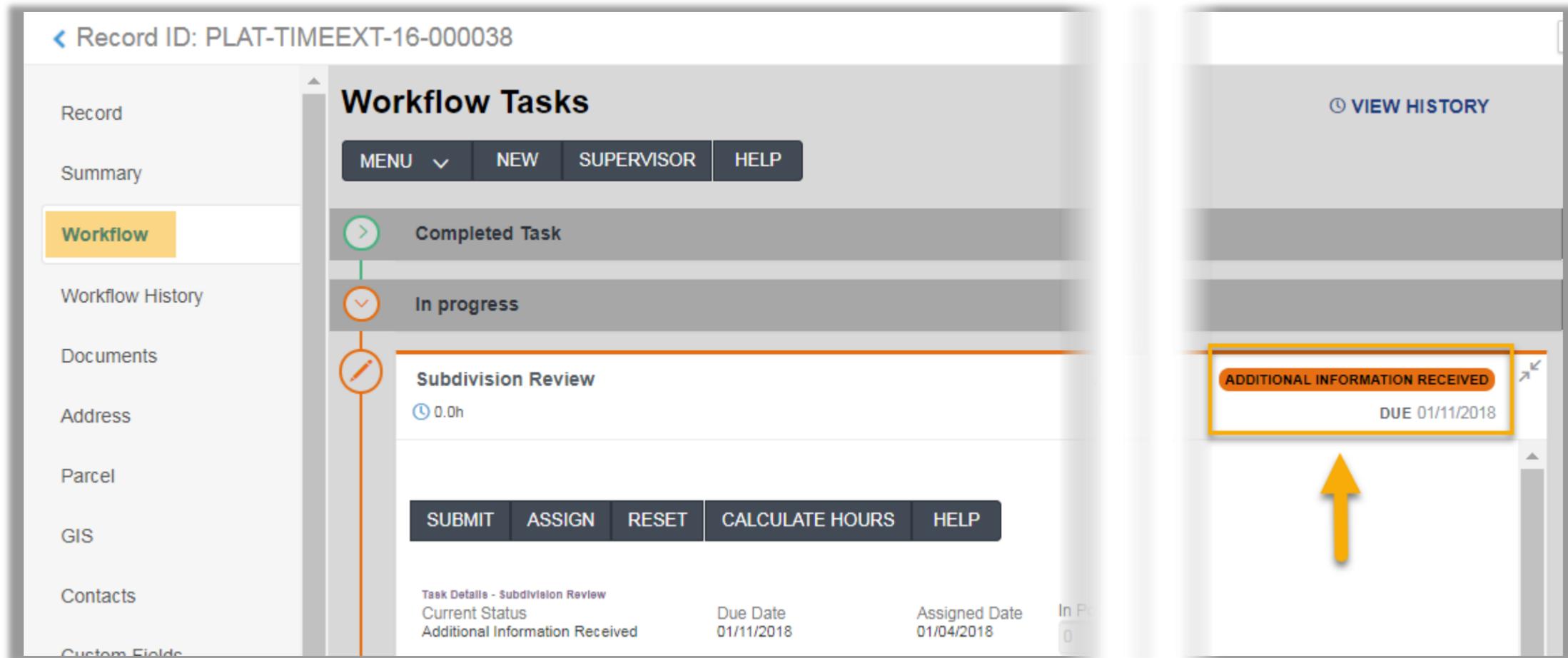
No signature  No payment  Invalid address

Invalid Legal Description  Other

Comments \*  
Type reason here.

check spelling

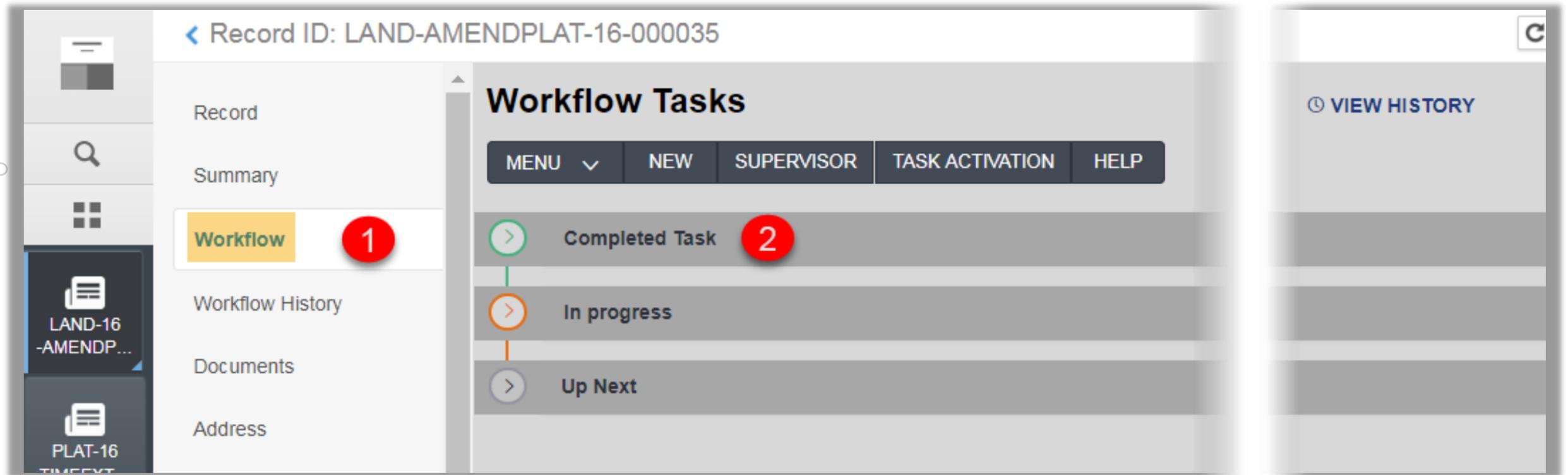
**Note: If Other is selected (#1 shown), then the Comments field text box becomes a required field (#2 shown).**



**Note: The updated task status now displays on the upper right-hand corner of the Task Banner.**

# **Viewing Workflow Task Comments**

**Viewing previously closed workflow tasks and reading Internal Comments may be helpful while updating a current task.**



- 1. From the Record's navigation bar, click on the Workflow Tab.**
- 2. Click on the Completed Task banner.**

Record ID: LAND-AMENDPLAT-16-000035

Record  
Summary  
**Workflow**  
Workflow History  
Documents  
Address

### Workflow Tasks

MENU ▾ NEW SUPERVISOR TASK ACTIVATION HELP

Completed Task

Application Intake ASSIGNED  
0.0h STARTED 10/26/2016 by

In progress

VIEW HISTORY

RECEIVED ONLINE  
DUE 10/26/2016

Click anywhere on the Completed Task Banner (displays with green border)

**3. All Completed tasks display. Click on the banner of the Completed Task you wish to view.**

Record ID: LAND-AMENDPLAT-16-000035

Record  
Summary  
**Workflow**  
Workflow History  
Documents  
Address  
Parcel  
GIS  
Contacts  
Custom Fields  
Custom Lists  
Inspections  
Conditions  
Conditions of Approval

Application Intake  
0.0h

**Note: Closed tasks pages are read-only.**

ASSIGNED  
STARTED 10/26/2016 by

**RECEIVED ONLINE**  
DUE 10/26/2016

**Task Details** Sub Tasks

**HELP**

Task Details Application Intake  
Current Status Received Online  
Status Date 10/26/2016  
In Possession Time (hrs)

Action By Action by Department System Administrators

Assigned to Assigned to Department System Administrators

Assigned Date 10/26/2016 Due Date 10/26/2016

**Comments**  
Closed via script

Display Comment in ACA  Display E-mail Address in ACA

Comment Display in ACA  
 All ACA Users  
 Record Creator  
 Licensed Professional  
 Contact  
 Owner

**4. The Task Details page of the closed task displays. Scroll to the Comments section to view comments.**

***Congratulations!***

◦ ***This concludes Module Eight***

**Updating Tasks in a Record**  
**Adding Workflow Task Comments**  
**Viewing Closed Task Workflow Comments**

*It is time to test your recall.....*

# TEST YOUR RECALL

1. Workflow tasks display in the \_\_\_\_\_ tab of the Record's Navigation bar.
2. Active Tasks are identified by red pencil icon. \_\_\_\_True \_\_\_\_False
3. Workflow tasks are updated per business processes. \_\_\_\_True \_\_\_\_False
4. Completed tasks display with a green border and check mark. \_\_\_\_True \_\_\_\_False
5. Workflow comments may be added to closed tasks. \_\_\_\_True \_\_\_\_False

***Answers on the next slide...***



**If you answered:**

**1. Workflow**

**2. True**

**3. True**

**4. True**

**5. False**

**You are correct!**

**Time to begin the next  
module...**

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