

City of San Antonio
Development Services Department

**Adding Filters
User Guide**

**Land Development
Development Services Department**



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Creating your own filters for Tasks assigned to you in status of <i>Additional Information Received</i>	4

Document Control

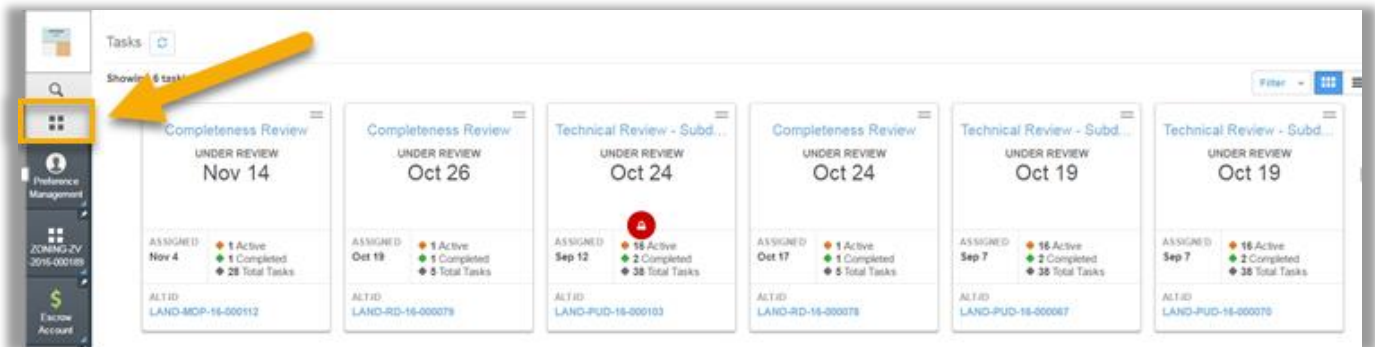
Date	Author	Version	Change Reference
10/04/2018	Patricia Cavazos	1	Initial Draft
10/05/2018	Patricia Rosas	1.1	Update format

Objective

User Guide for transition to BuildSA/October 1st, 2018:

Creating your own filters for Tasks assigned to you in status of *Additional Information Received*.

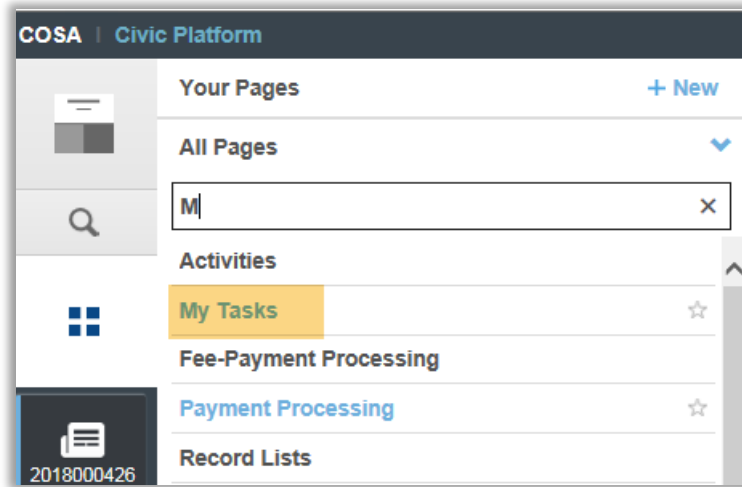
1. Click the **Launchpad** (shown).



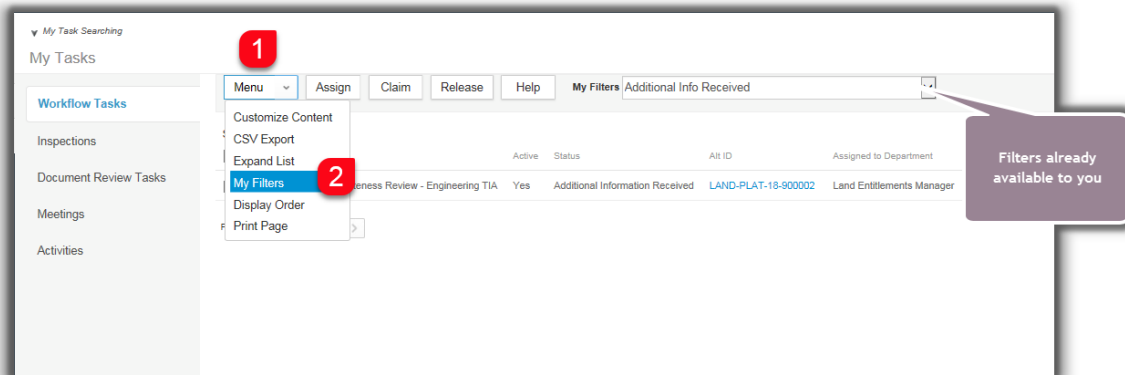
2. Click **All Pages** (shown).



3. **Filter** for and select *My Tasks*.

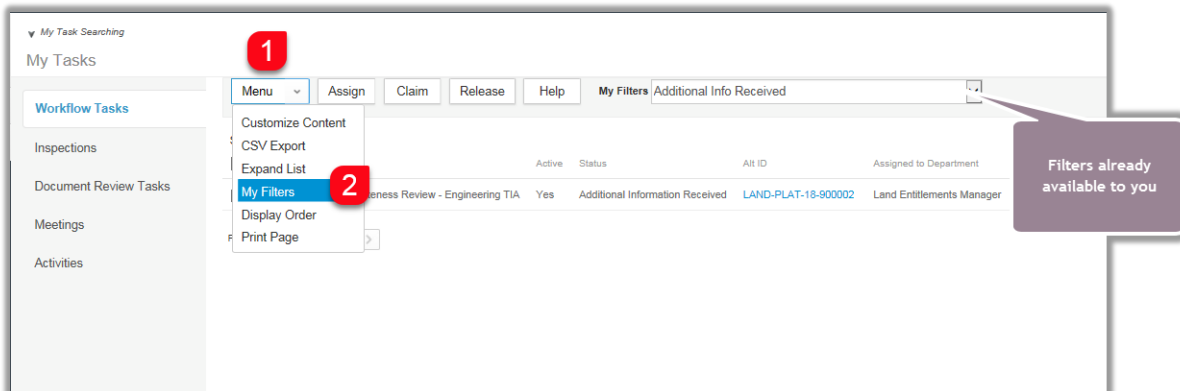


4. My Tasks page displays (shown).



5. From My Task page **click Menu**. Next, **click My Filters**.

❖ **Note: There are already a list of Filters available to you. Click 'My Filters' to view (shown).**



6. My Filters page displays (shown). **Click New** (shown).

My Task Searching

My Filters **1**

Menu ▾ New Delete Cancel Help

Showing 1-5 of 6

<input type="checkbox"/>	Name	Primary	Description
<input type="checkbox"/>	Additional Info Received	No	Additional Info Received Tasks
<input type="checkbox"/>	Workflow Task Additional Info Received or Under Review	No	Workflow Task Additional Info Received or Under Review
<input type="checkbox"/>	My Department Unassigned Tasks	No	Department's Unassigned Task
<input type="checkbox"/>	My Department Tasks	No	Department's Workflow Task

7. **Type** the Name of the Filter (#1 shown) and Description (#2 shown).

My Task Searching

My Tasks

Submit **1** Reset New Field Delete Field Preview SQL **2** Cancel Help

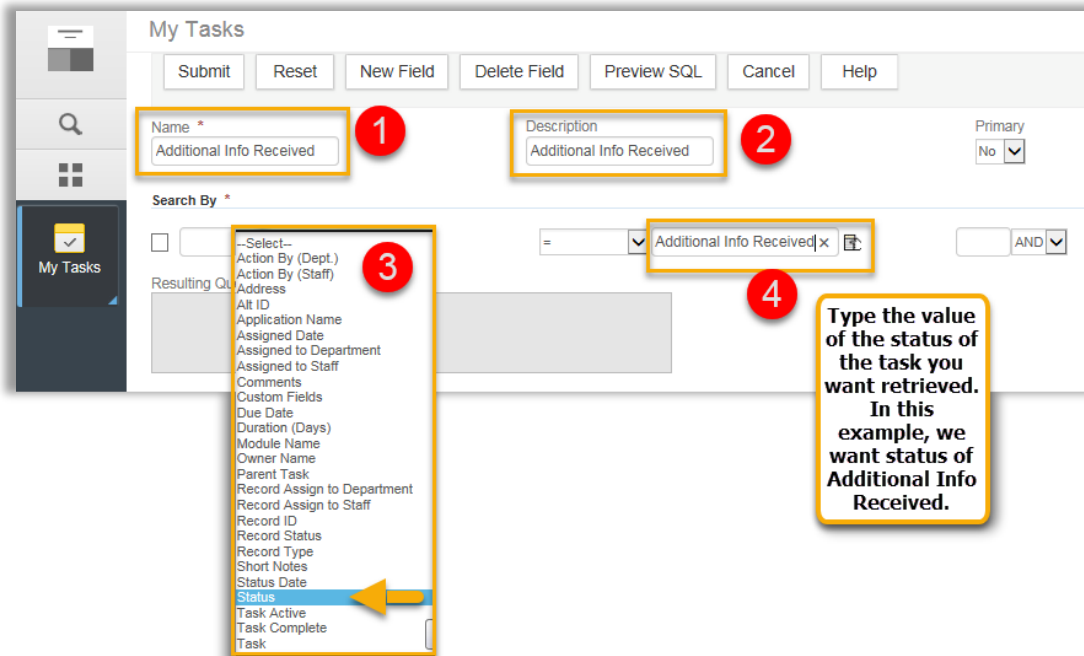
Name * Additional Info Received Description in Additional Info Received Primary No ▾

Search By *

--Select-- ▾ = ▾ AND ▾

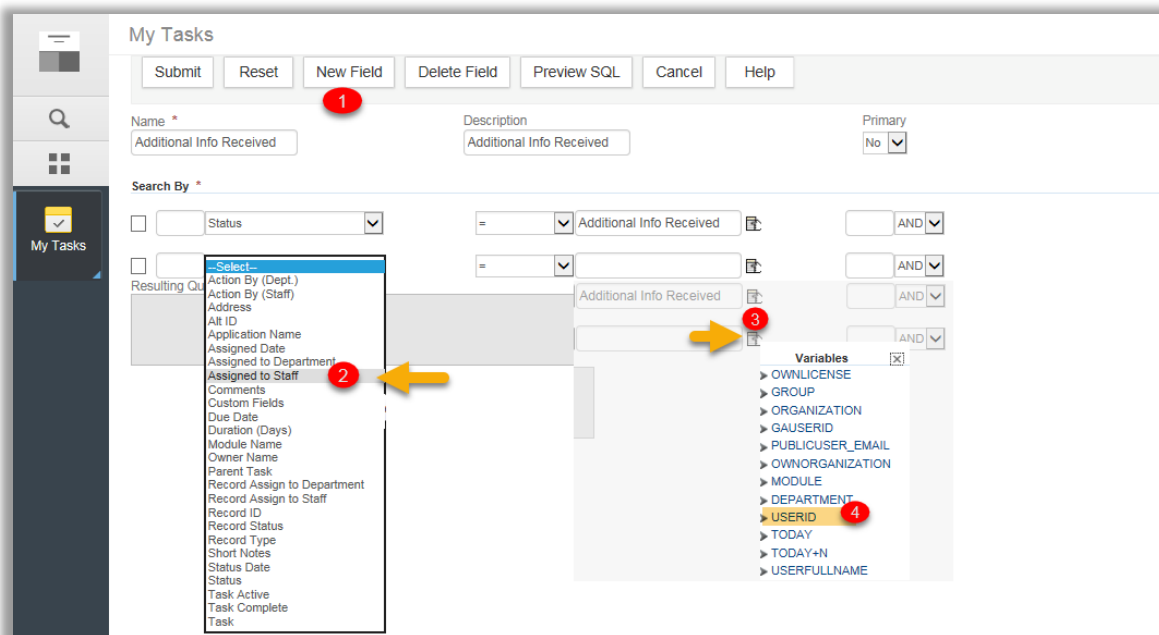
Resulting Query

8. Click the Select Drop Down menu arrow (shown). Next, click to select *Status* (shown).



9. Next, click *New Field* (#1 shown). Click to select *Assigned to Staff* (#2 shown).

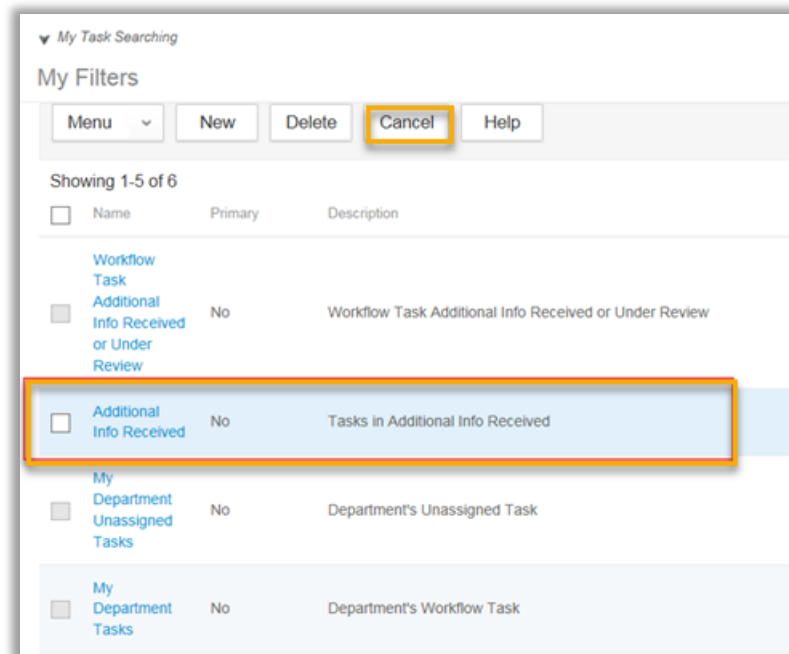
10. Click the *Variable* drop down menu (#3 shown; small hand icon). Click to select *Userid* (#4 shown).



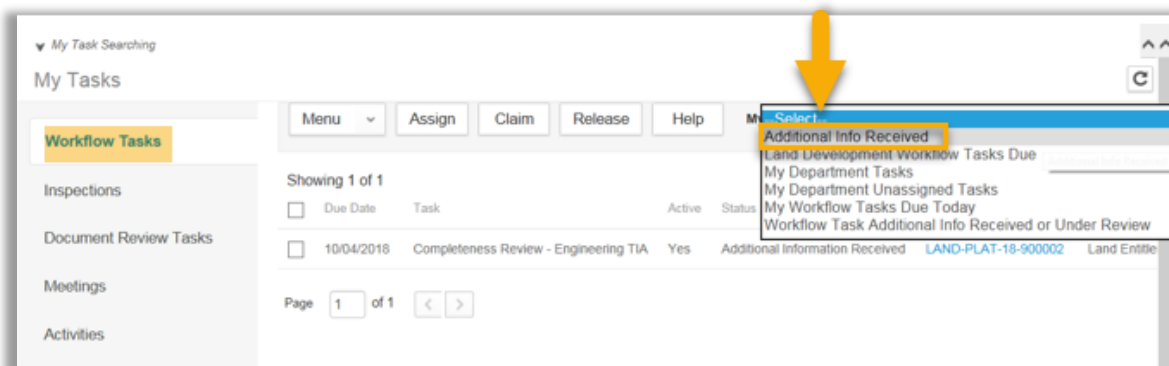
11. Click *Submit*.

12. The new filter now displays under My Filters (shown).

13. **Click Cancel** from the My Filter page to return to My Task list (shown).



14. **Click** to select the filter dropdown menu (shown). Your new filter is listed. **Click** to select it and display the results of tasks assigned to you in status of Additional Information Received.



15. Repeat this function for any task assigned to you for other task statuses.