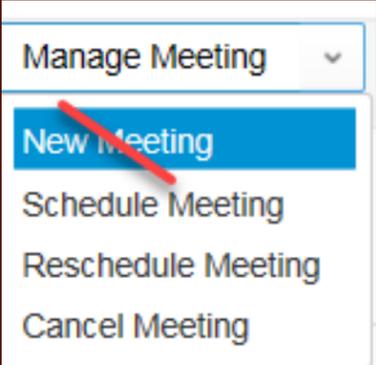


***On-line Tutorial Series***

***Module Twelve***

***Meeting Management***

**The only meetings to be scheduled at this time are: Planning Commission, PPR, City Council and Zoning. Note: the New Meeting option is an out-of-the-box functionality and not for use at this time (shown).**



**Application-specific meeting management is addressed in the record-type specific training sessions. Please see your supervisor or BuildSA Change Agent with any questions.**

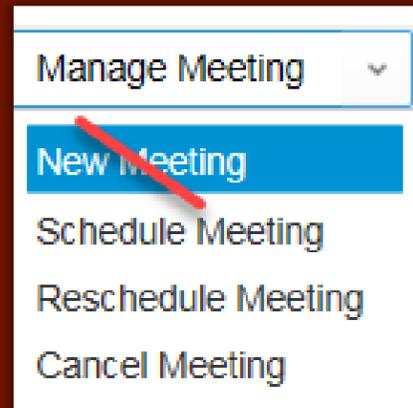
# **Scheduling/Rescheduling or Cancelling a Meeting**

- 1. Schedule, reschedule or cancel Planning Commission, PPR, City Council and Zoning meetings using the Record's navigation bar to access the Meetings Tab.**

**Please keep in mind that application specific meeting management may generate email notifications to customers. See your supervisor or BuildSA Change Agent with any questions.**

# Scheduling Meetings

**Schedule meetings having pre-defined dates using the Manage Meeting → Schedule Meeting path.**



**Application-specific training includes meeting management instructions.**

The screenshot displays a software interface with a sidebar on the left containing navigation options: Record, Summary, Workflow, Workflow History, and Documents. The main area features a 'Menu' dropdown set to 'Manage Meeting', which is open to show options: 'New Meeting', 'Schedule Meeting' (highlighted), 'Reschedule Meeting', and 'Cancel Meeting'. To the right are 'Calendar' and 'Help' buttons. Below the menu is a table with the following data:

Subject	Date	Start Time	Status	Assign Status
Test 53	03/02/2018	06:00	Scheduled	Scheduled
Test 53	03/02/2018	06:00	Scheduled	Scheduled

At the bottom, a 'Communications' section is visible with a 'Meetings' tab highlighted in yellow.

- 1. Retrieve the Record.**
- 2. Navigate to the Meetings tab.**
- 3. From the Manage Meeting drop-down menu options, select Schedule Meeting.**

Record

Summary

Workflow

Workflow History

Documents

Submit Reset Cancel Help

Meeting Body

Duration (min)

--Select--

Location

--Select--

Board Room

Camp Conference Room

City Hall

Planning Commission Room

Tobin Room

Date:

From: 03/07/2018

To: 04/07/2018

Communications

Meetings

- 4. The Meeting Body field text box and the Date selection fields are optional.**
- 5. Click the location drop-down menu and select a Location for the meeting.**
- 6. Click Submit.**

# Meetings with pre-defined dates scheduled in the Location selected display.

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

Payment

Menu

Showing 1-5 of 6

Subject	Meeting Body	Location	Date	Start Time	End Time	Status	Day-of-Week	Duration (min)	Reason	Comments
<input type="radio"/> Planning Commis...	Planning ...	Board Room	03/14/2018	14:00	16:00		Wednesday	120	--Select--	<input type="text"/> <a href="#">check spelling</a>
<input type="radio"/> Testing Reminde...	Prelimina...	Board Room	03/16/2018	13:00	15:00		Friday	120	--Select--	<input type="text"/> <a href="#">check spelling</a>
<input type="radio"/> Board of Adjust...	Board of ...	Board Room	03/19/2018	13:00	15:00		Monday	120	--Select--	<input type="text"/> <a href="#">check spelling</a>
<input type="radio"/> est	Prelimina...	Board Room	03/20/2018	06:00	07:00		Tuesday	60	--Select--	<input type="text"/> <a href="#">check spelling</a>
<input type="radio"/> Testing Meeting...	Prelimina...	Board Room	03/27/2018	13:00	15:00		Tuesday	120	--Select--	<input type="text"/> <a href="#">check spelling</a>

Page  of 2

Communications

**Meetings**

The screenshot displays a web application interface for scheduling meetings. On the left is a sidebar with navigation options: Record, Summary, Workflow, Workflow History, Documents, Address, Parcel, GIS, Contacts, Custom Fields, Custom Lists, Inspections, Conditions, Conditions of Approval, Fee, Assess Fee History, and Payment. The main area features a table with the following columns: Subject, Meeting Body, Location, Date, Start Time, End Time, Status, Day-of-Week, Duration (min), Reason, and Comments. The table lists five meetings, with the first one highlighted in blue. A red circle '1' points to the radio button for the first meeting. A red circle '2' points to the dropdown menu for the 'Reason' column of the first meeting, which is open and shows options like 'Preliminary Plan Review - Land Development Meeting'. A red circle '3' points to the 'Comments' text box for the first meeting. A red circle '4' points to the 'Submit' button at the top of the interface. The page also shows 'Showing 1-5 of 6' records and a 'Page 1 of 2' indicator.

**7. Click the radio button to the left of the meeting you want to schedule (#1 shown).**

**8. Select meeting type from the drop down menu (#2 shown).**

**9. Type any comments in the Comments box (#3 shown).**

**10. Click Submit (#4 shown).**

The screenshot shows a web form titled "Meeting Details". On the left is a sidebar with navigation links: "Details" (highlighted), "Agenda & Vote", "Attendees", "Attendance", and "Attachments". The main form area contains the following fields and controls:

- Buttons: "Send", "Submit" (highlighted with a yellow border), "Cancel", and "Help".
- Meeting Type: A dropdown menu with "PRELIMINARY PLAN REVIEW" selected.
- Meeting Body: A dropdown menu with "Preliminary Plan Review" selected.
- Date: A text input field containing "03/27/2018" and a calendar icon.
- All Day Event: A checkbox that is currently unchecked.
- Meeting Status: A dropdown menu with "--Select" selected.
- Start Time: A time selection field with "0:" for hours, "00:" for minutes, and "P" for period.
- End Time: A time selection field with "0:" for hours, "00:" for minutes, and "P" for period.
- Maximum Agenda Items: A text input field containing the number "3".
- Reminder: A text input field containing "0" followed by "Day(s)".
- Subject: A text input field containing "Testing Meeting Scheduled".
- Comments: A text area with a "check spelling" link below it.
- Location: A dropdown menu with "Board Room" selected.
- Organizer: A text label "Organizer" with "PR16000" below it.
- Responsible Person: A dropdown menu with "Land Entitlemen" selected.
- Current User: A dropdown menu with "Caryn Moore" selected.

**11.The Meeting Details page displays. Complete all required fields.**

**12.Click Submit.**

Record

Summary

Workflow

Workflow History

Menu Manage Meeting Calendar Help

Subject	Meeting Body	Date	Start Time	Status	Assign Status
Testing Meeting Sc...	Preliminary Pla...	03/27/2018	13:00	Scheduled	

Communications

Meetings

**13.The Meeting is now scheduled and displays on the Meetings page of the Record.**

# Important

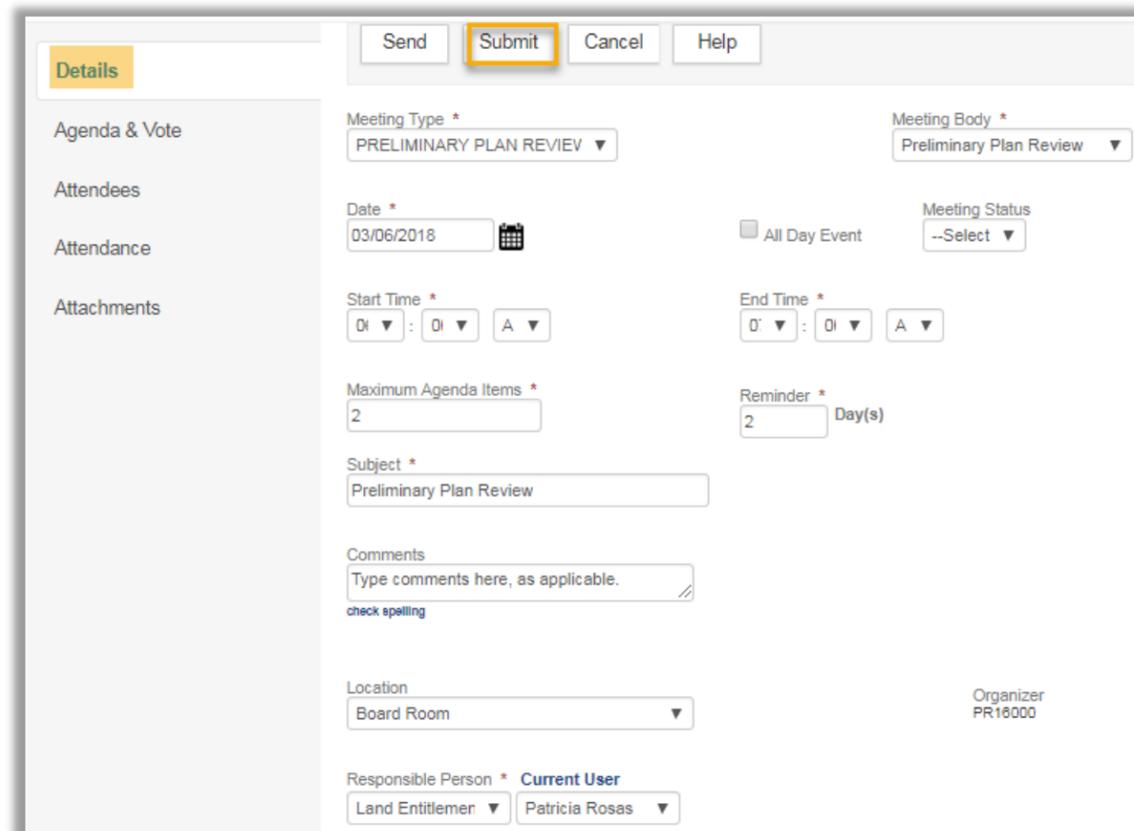
**Managing meetings may generate notifications to the customer. Follow business processes whenever working with transactional records and meetings.**

# **Modifying, Rescheduling and Cancelling Meetings**

**Make updates to meetings using the  
transactional record's Meeting tab.**

# Modifying Meeting Details

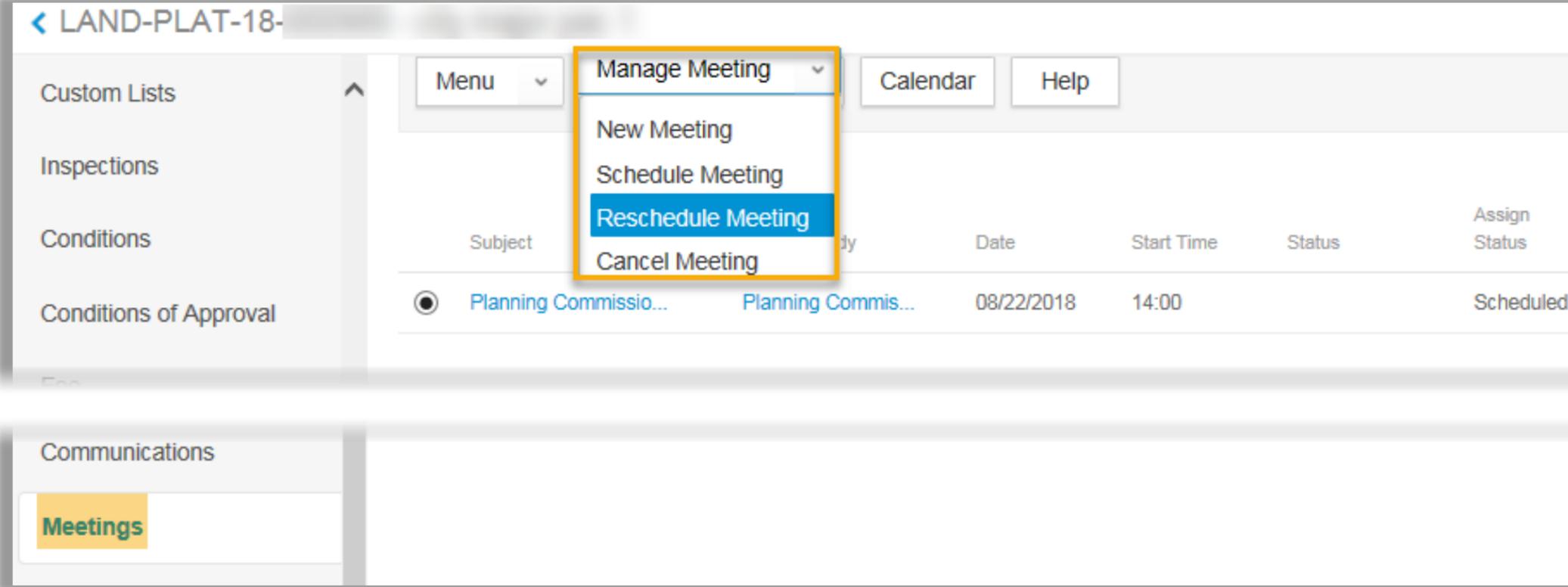
1. Retrieve the Record.
2. From the Record's navigation bar, click the Meetings Tab.
3. Click the hyperlink for the meeting you want to modify.  
Meeting Details page displays.
4. Modify meeting details, as applicable.
5. Click Submit.



The screenshot shows a web-based form for editing meeting details. At the top, there are buttons for 'Send', 'Submit' (highlighted with a yellow border), 'Cancel', and 'Help'. The form is organized into several sections:

- Meeting Type \***: A dropdown menu set to 'PRELIMINARY PLAN REVIEW'.
- Meeting Body \***: A dropdown menu set to 'Preliminary Plan Review'.
- Date \***: A text input field containing '03/06/2018' with a calendar icon to its right.
- Meeting Status**: A dropdown menu set to '--Select'.
- All Day Event**: A checkbox that is currently unchecked.
- Start Time \***: A time selection field with dropdowns for hours (01), minutes (01), and AM/PM (A).
- End Time \***: A time selection field with dropdowns for hours (01), minutes (01), and AM/PM (A).
- Maximum Agenda Items \***: A text input field containing the number '2'.
- Reminder \***: A text input field containing '2' followed by 'Day(s)'.
- Subject \***: A text input field containing 'Preliminary Plan Review'.
- Comments**: A text area with the placeholder text 'Type comments here, as applicable.' and a 'check spelling' link below it.
- Location**: A dropdown menu set to 'Board Room'.
- Organizer**: A text label 'Organizer' followed by 'PR16000'.
- Responsible Person \***: A dropdown menu set to 'Current User'.
- Land Entitlemer**: A dropdown menu set to 'Patricia Rosas'.

# Reschedule a Meeting



The screenshot shows a web application interface for managing meetings. On the left, there is a navigation menu with options: Custom Lists, Inspections, Conditions, and Conditions of Approval. The main area features a 'Menu' dropdown, a 'Calendar' button, and a 'Help' button. A 'Manage Meeting' dropdown menu is open, showing options: New Meeting, Schedule Meeting, Reschedule Meeting (highlighted in blue), and Cancel Meeting. Below the menu is a table with columns: Subject, Date, Start Time, Status, and Assign Status. A single meeting is listed with a selected radio button, subject 'Planning Commissio...', date '08/22/2018', start time '14:00', and status 'Scheduled'. At the bottom, there is a 'Communications' section with a 'Meetings' tab highlighted.

Subject	Date	Start Time	Status	Assign Status
<input checked="" type="radio"/> Planning Commissio...	08/22/2018	14:00	Scheduled	Scheduled

- 1. Click the radio button to the left of the meeting that is to be rescheduled.**
- 2. From the Manage Meeting drop-down menu, click to select Reschedule Meeting.**

**3. The Reschedule page displays. Use the calendar icons to select a reschedule date for the meeting.**

**4. Click Submit.**

The screenshot displays a web interface for rescheduling a meeting. On the left is a navigation sidebar with the following items: Record, Summary, Workflow, Workflow History, Documents, Communications, and Meetings (highlighted in yellow). The main content area is divided into three columns. The first column contains a 'Meeting Body' text input field and a 'Duration (min)' dropdown menu set to '--Select--'. Above these fields are four buttons: 'Submit' (highlighted with a yellow border), 'Reset', 'Cancel', and 'Help'. The second column contains a 'Location' dropdown menu set to '--Select--' and a 'Day-of-Week' dropdown menu set to '--Select--'. The third column contains a 'Date' section with two date pickers: 'From: 03/07/2018' and 'To: 04/07/2018', each with a calendar icon to its right. The 'Date' section is highlighted with a yellow border.

**5. All meetings scheduled for the date range display. Click the radio button to the left of the meeting date you want (# 1 shown).**

**6. The Reason and Comments fields are optional. Click Submit (#2 shown).**

LAND-PLAT- [Menu] **Submit** [Reset] [Cancel] [Help]

Subject	Meeting Body	Location	Date
help	Planning ...	Board Room	07/11/2018
Zoning Commissi...	Zoning Co...	Camp Conf...	07/17/2018
Meeting - PLAT-...	Planning ...	Board Room	07/18/2018
<input checked="" type="radio"/> Planning Commis...	Planning ...	Planning ...	07/25/2018

Reason Comments Application Duration (min)

--Select-- [check spelling]

--Select-- [check spelling]

--Select-- [check spelling]

--Select-- [check spelling]

Reason field is optional.

Comments field is optional.

**7. The Meeting Detail page displays. Verify the rescheduled date.**

**8. Click the Submit button. The rescheduled meeting now displays with a status of Rescheduled.**

LAND-PLAT-

Menu Manage Meeting Calendar Help

Subject	Meeting Body	Date	Start Time	Status	Assign Status
Planning Commissio...	Planning Commis...	08/22/2018	14:00	Rescheduled	
Planning Commissio	Planning Commis	08/22/2018	14:00	Rescheduled	

Communications

Meetings

# cancelling Meetings

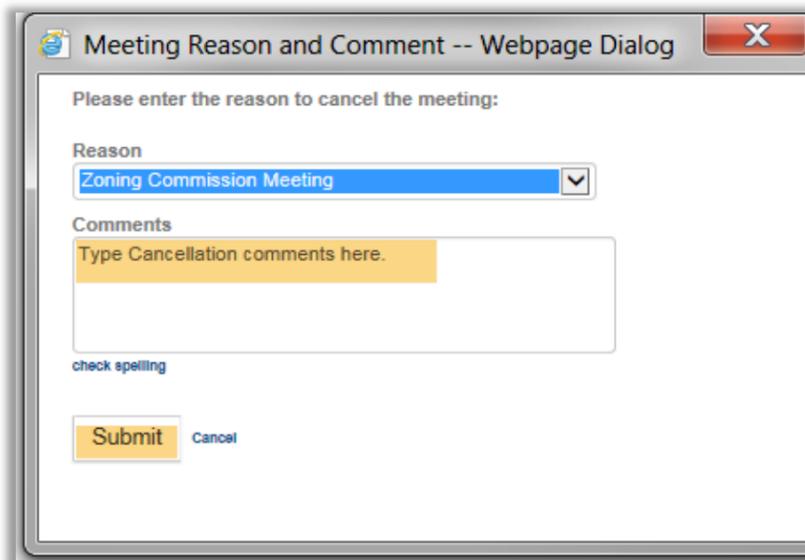
# Cancelling Meetings

1. Retrieve the Record.
2. Click the Meetings Tab.
3. Click radio button to the left of meeting you want to cancel.
4. From the Manage Meeting drop-down menu click Cancel Meeting.

The screenshot displays a web application interface for managing meetings. On the left, there is a sidebar with navigation options: Record, Summary, Workflow, Workflow History, Documents, and Address. The main content area features a table with columns for Subject, Date, Start Time, Status, and Assign Status. A 'Manage Meeting' dropdown menu is open over the first row of the table, showing options: New Meeting, Schedule Meeting, Reschedule Meeting, and Cancel Meeting. The 'Cancel Meeting' option is highlighted in green. Below the table, there is a 'Communications' section with a 'Meetings' tab selected.

Subject	Date	Start Time	Status	Assign Status
<input type="radio"/> testing	07/11/2017	06:00	Scheduled	Scheduled
<input type="radio"/> testing	07/11/2017	06:00	Rescheduled	Rescheduled
<input checked="" type="radio"/> Zoning Commission ...	07/18/2017	13:00	Scheduled	Scheduled

**5. A Meeting Reason and Comment callout box displays. Click the drop-down menu and select the meeting type you are cancelling.**



Meeting Reason and Comment -- Webpage Dialog

Please enter the reason to cancel the meeting:

Reason  
Zoning Commission Meeting

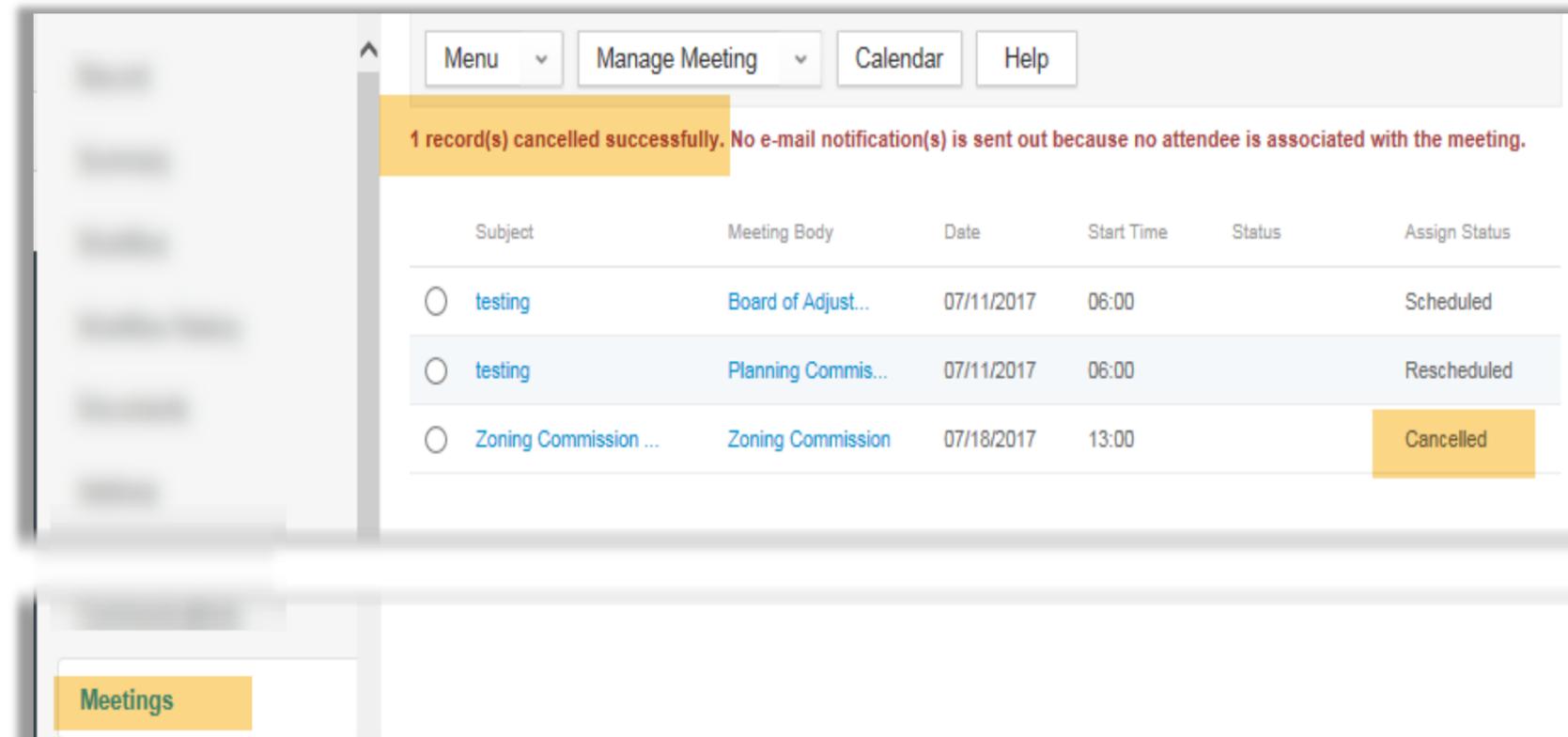
Comments  
Type Cancellation comments here.

check spelling

Submit Cancel

**6. Click Submit.**

## 7. BuildSA displays the message '1 record(s) cancelled successfully' and the status of the meeting is changed to Cancelled.



The screenshot displays the BuildSA interface for managing meetings. At the top, there are navigation buttons: 'Menu', 'Manage Meeting', 'Calendar', and 'Help'. Below these, a yellow notification bar states: '1 record(s) cancelled successfully. No e-mail notification(s) is sent out because no attendee is associated with the meeting.' The main content is a table with the following columns: Subject, Meeting Body, Date, Start Time, Status, and Assign Status. The table contains three rows of meeting data. The third row, 'Zoning Commission ...', has its 'Status' cell highlighted in yellow and labeled 'Cancelled'. The 'Meetings' tab is selected in the bottom left corner.

Subject	Meeting Body	Date	Start Time	Status	Assign Status
<input type="radio"/> testing	Board of Adjust...	07/11/2017	06:00	Scheduled	Scheduled
<input type="radio"/> testing	Planning Commis...	07/11/2017	06:00	Rescheduled	Rescheduled
<input type="radio"/> Zoning Commission ...	Zoning Commission	07/18/2017	13:00	Cancelled	Cancelled

***Congratulations!***

***This concludes Module Twelve***

# ***Meeting Management***

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

## TEST YOUR RECALL

1. Record specific meeting management is addressed in application specific training. \_\_\_\_\_ True \_\_\_\_\_ False.
2. Scheduling/Rescheduling or Cancelling a meeting may generate an email to the customer. \_\_\_\_\_ True \_\_\_\_\_ False.
3. Modify meeting details such as date, time, location, etc. in the transactional record. \_\_\_\_\_ True \_\_\_\_\_ False.
4. Only Planning Commission, PPR, City Council and Zoning meetings are to be scheduled using BuildSA at this time. \_\_\_\_\_ True \_\_\_\_\_ False

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



If you answered:

1. True
2. True
3. True
4. True

**You are correct!**

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

## **Organization Change Management Team Contact Information**

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