



On-line Tutorial Series

Module Eight

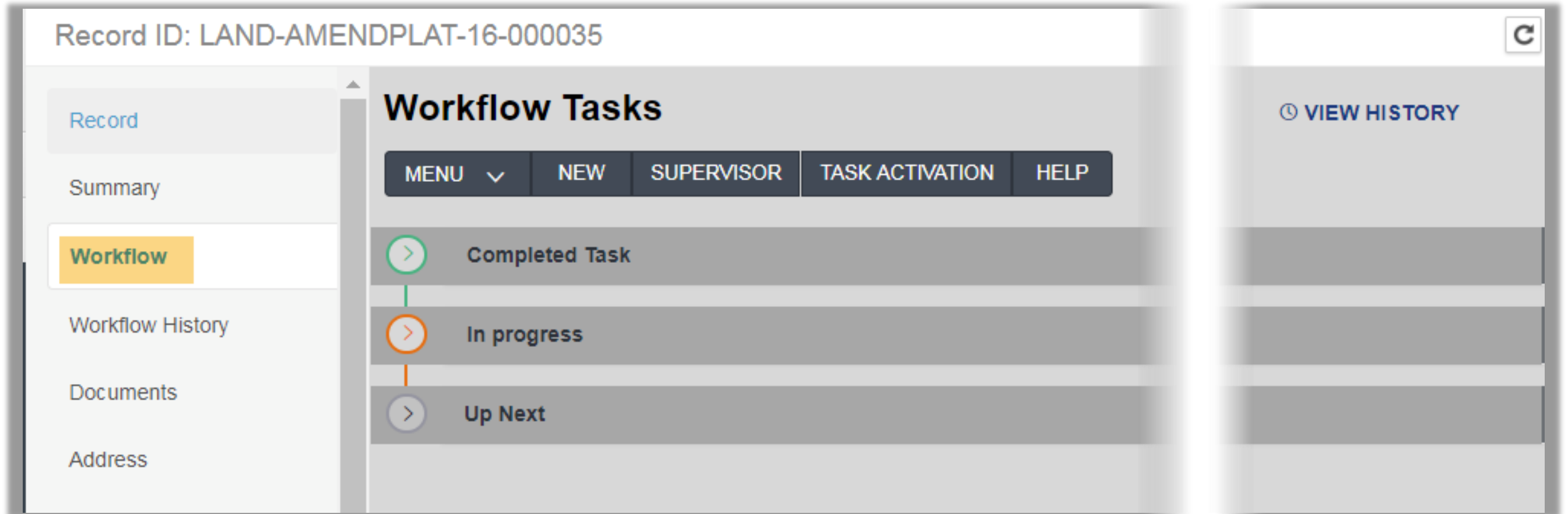
Assigning Workflow Tasks

Assigning Workflow Tasks

**Note: Some Workflow Tasks are systematically assigned.
Please see your BuildSA Change Agent or Supervisor with any
questions.**

Assigning Workflow Tasks Using the Record's Workflow Tab

Assigning Workflow Tasks Using the Record's Workflow Tab



1. Retrieve the Record.

2. From the Record's navigation bar, click on the Workflow Tab.

Record ID: LAND-AMENDPLAT-16-000035





Workflow Tasks [VIEW HISTORY](#)

MENU NEW SUPERVISOR TASK ACTIVATION HELP

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

Completed Task

In progress

 Application Completeness 0.0h	ASSIGNED Valerie Huerta STARTED By	UNDER REVIEW DUE 10/31/2016
 Technical Review - GIS 0.0h	ASSIGNED STARTED 10/26/2016 By	UNDER REVIEW DUE
 Technical Review - Subdivision 0.0h	ASSIGNED Valerie Huerta STARTED 10/26/2016 By	UNDER REVIEW DUE
 Technical Review - Addressing 0.0h	ASSIGNED Valerie Huerta STARTED 10/26/2016 By	UNDER REVIEW DUE

Up Next

3. Click the Active Task banner of the Workflow task you wish to assign.

4. The Task Details page displays. Click the Assign tab.

Record ID: LAND-AMENDPLAT-16-000035

Task Details Sub Tasks

SUBMIT ASSIGN RESET CALCULATE HOURS HELP

Task Details - Application Completeness

Current Status Under Review	Due Date 10/31/2016	Assigned Date 10/26/2016	In Possession Time (hrs) <input type="text"/>
Assigned to Department Addressing Planner	Assigned to Valerie Huerta	Status Date	

Record

Summary

Workflow

Workflow History

Documents

5. The Assignment Task page displays.

Record ID: LAND-AMENDPLAT-16-000035

SUBMIT RESET CANCEL HELP

Department * Current Department Addressing Planner

Staff * Current User Valerie Huerta

Check Availability

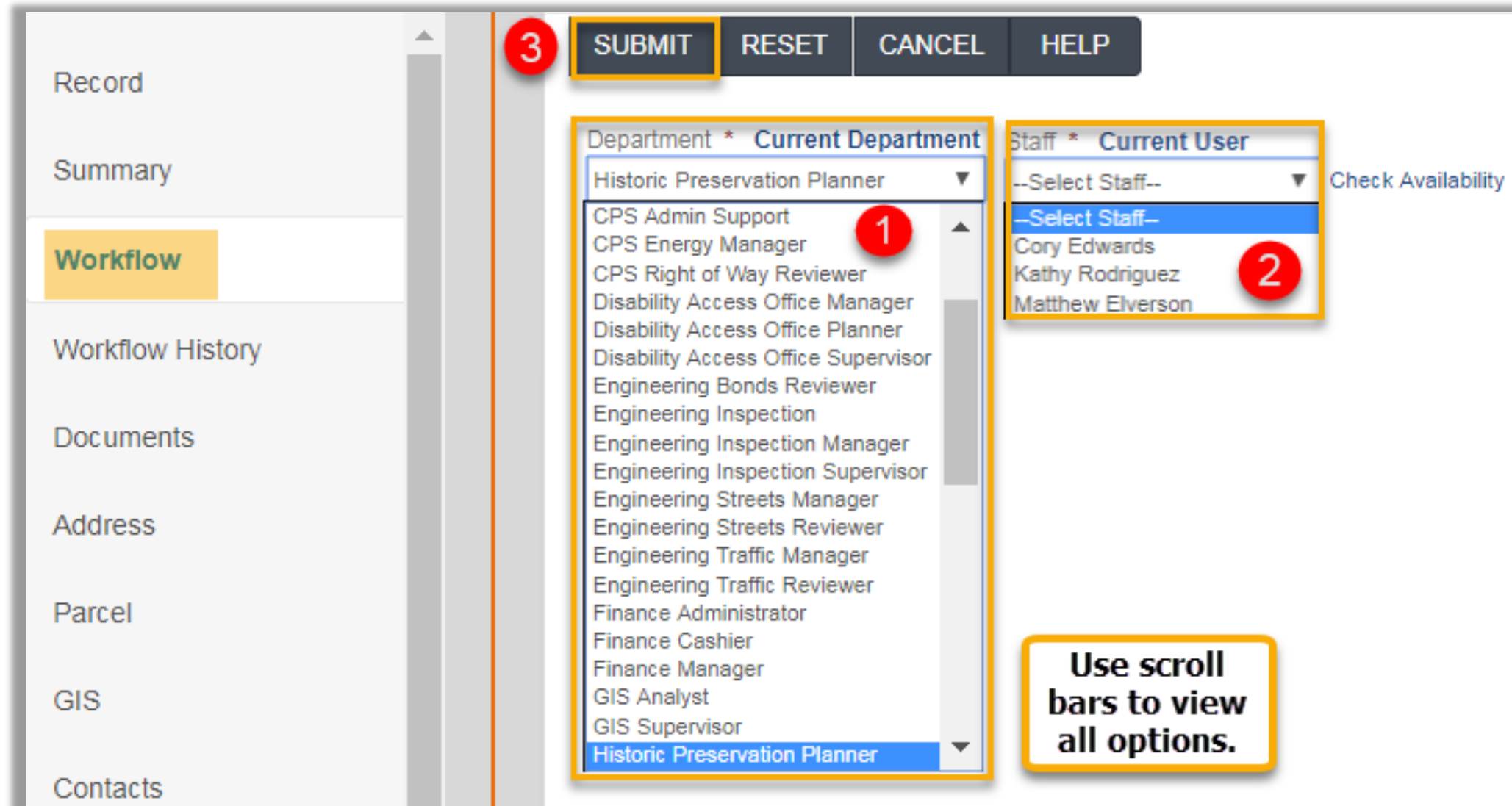
Due Date 10/31/2016

Record

Summary

Workflow

Workflow History



6. Click the Department drop-down menu arrow to view and select Department.

7. Staff names populate depending on the Department selected. Click a name to select Staff.

8. Click Submit.

Record

Summary

Workflow

Workflow History

SUBMIT **ASSIGN** **RESET** **CALCULATE HOURS** **HELP**

Task Details Sub Tasks

Task Details - Application Completeness

Current Status: Under Review

Due Date: 10/31/2016

Assigned Date: 02/22/2018

In Possession Time (hrs)

Assigned to Department: Historic Preservation Planner

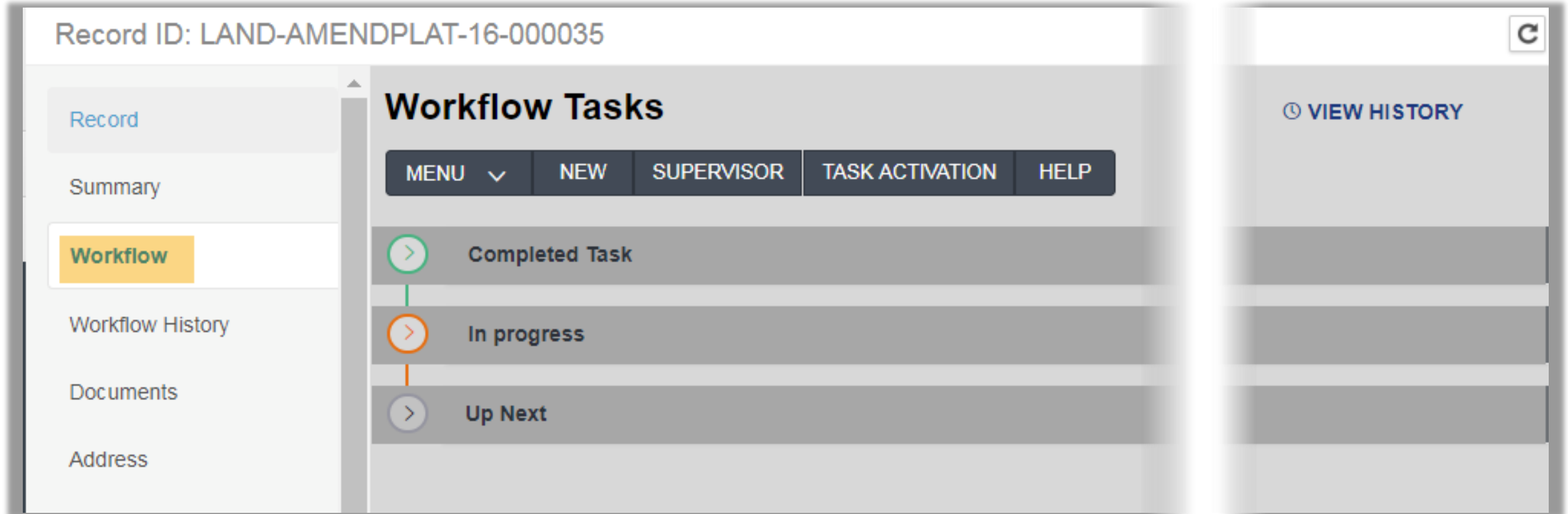
Assigned to: Matthew Elverson

Status Date

9. After clicking Submit, the Task Details page for the Task displays. Verify the Assignment.

Self-Assignment of Workflow Tasks

Self-Assignment of Tasks Using the Record's Workflow Tab



1. Retrieve the Record.

2. From the Record's navigation bar, click on the Workflow Tab.

Record ID: LAND-AMENDPLAT-16-000035

Workflow Tasks

MENU NEW SUPERVISOR TASK ACTIVATION HELP

VIEW HISTORY

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists









Inspections

Conditions

Conditions of Approval

Completed Task

In progress

 Application Completeness	ASSIGNED Valerie Huerta	UNDER REVIEW
 0.0h	STARTED By	DUE 10/31/2016
 Technical Review - GIS	ASSIGNED	UNDER REVIEW
 0.0h	STARTED 10/26/2016 By	DUE
 Technical Review - Subdivision	ASSIGNED Valerie Huerta	UNDER REVIEW
 0.0h	STARTED 10/26/2016 By	DUE
 Technical Review - Addressing	ASSIGNED Valerie Huerta	UNDER REVIEW
 0.0h	STARTED 10/26/2016 By	DUE

Up Next

3. Click the Active Task banner of the Workflow task you wish to assign to yourself.

4. The Task Details page displays. Click the Assign tab.

Record ID: LAND-AMENDPLAT-16-000035

Record

Summary

Workflow

Workflow History

Documents

Task Details Sub Tasks

SUBMIT **ASSIGN** RESET CALCULATE HOURS HELP

Task Details - Application Completeness

Current Status Under Review	Due Date 10/31/2016	Assigned Date 10/26/2016	In Possession Time (hrs) <input type="text"/>
Assigned to Department Addressing Planner	Assigned to Valerie Huerta	Status Date	

5. The Assignment Task page displays.

Record ID: LAND-AMENDPLAT-16-000035

Record

Summary


Workflow

Workflow History

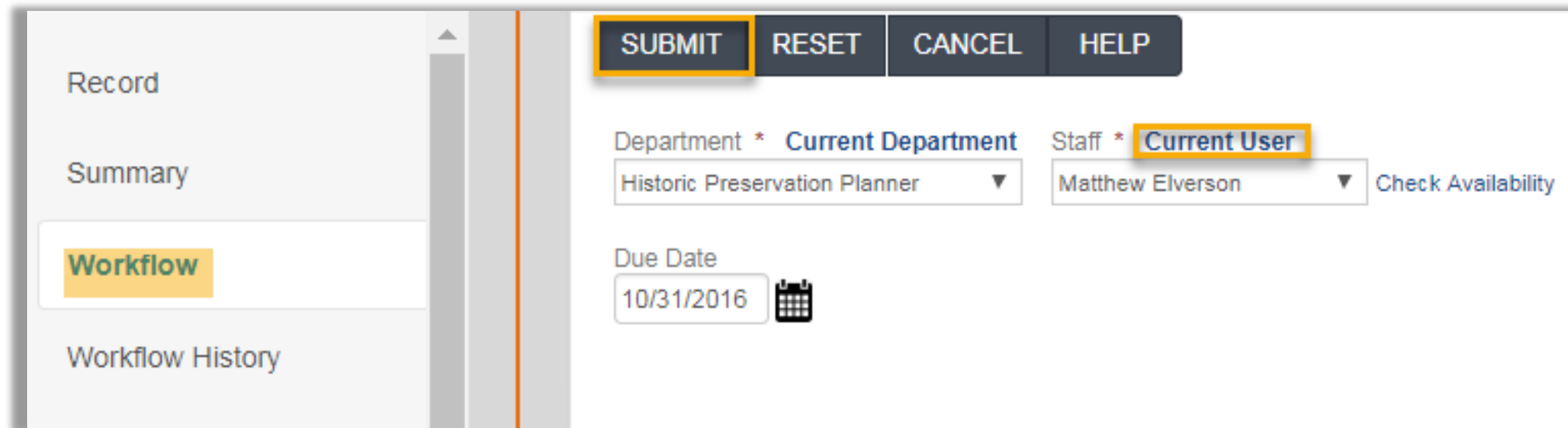
SUBMIT RESET CANCEL HELP

Department * **Current Department**
Addressing Planner ▼

Staff * **Current User**
Valerie Huerta ▼

Due Date
 

6. Click the Current User hyperlink.



Record

Summary

Workflow

Workflow History

SUBMIT RESET CANCEL HELP

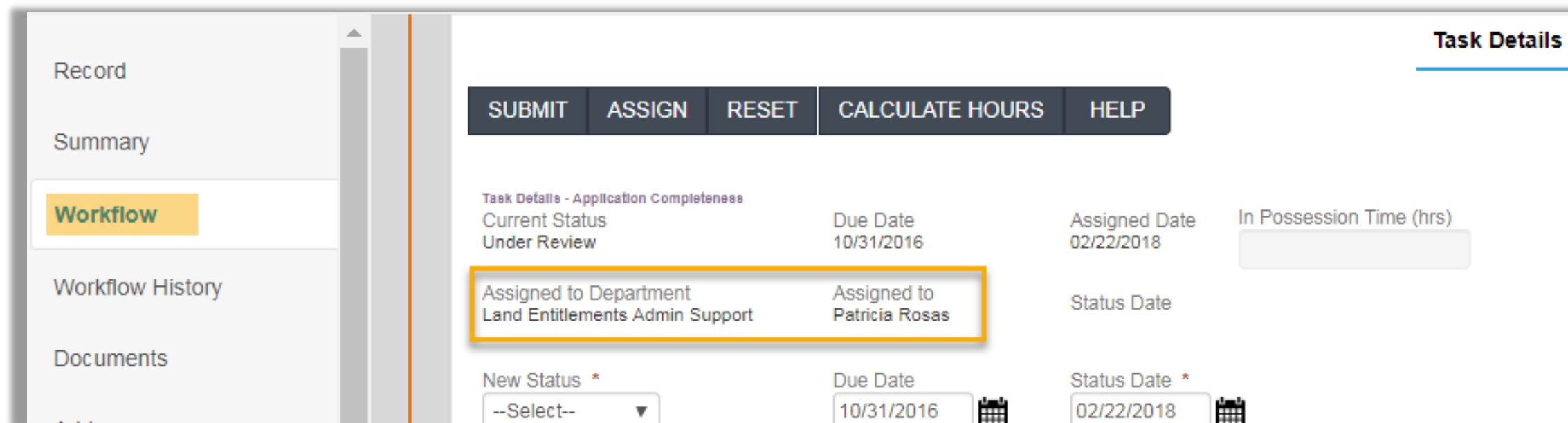
Department * **Current Department** Staff * **Current User**

Historic Preservation Planner Matthew Elverson Check Availability

Due Date

10/31/2016

7. Click Submit. The Task Details page of the Task displays. Verify assignment.



Record

Summary

Workflow

Workflow History

Documents

SUBMIT ASSIGN RESET CALCULATE HOURS HELP

Task Details - Application Completeness

Current Status	Due Date	Assigned Date	In Possession Time (hrs)
Under Review	10/31/2016	02/22/2018	

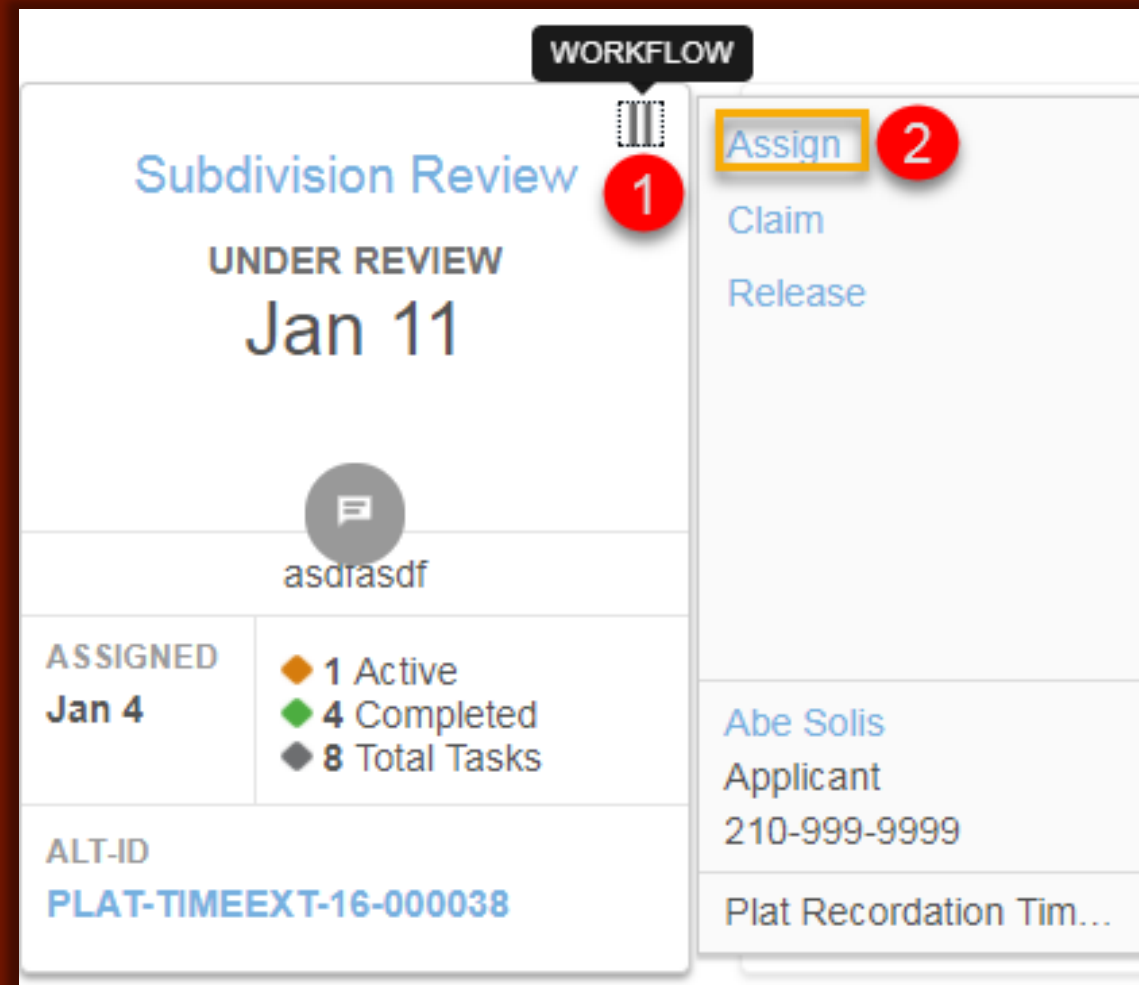
Assigned to Department	Assigned to	Status Date
Land Entitlements Admin Support	Patricia Rosas	

New Status * Due Date Status Date *

--Select-- 10/31/2016 02/22/2018

Task Details

Assigning Workflow Tasks Using the Task Card




- 1. Click the Task Card's Workflow Options button to display the Slide-out Panel.**
- 2. Click on the Assign hyperlink.**

Assign **3**

SUBMIT **RESET** **HELP**

Department * Current Department
Engineering Traffic Manager ▼ **1**

Staff * Current User
--Select Staff-- ▼ **2**
--Select Staff--
Kevin Collins

Due Date
 

Check Availability

- 3. Use the Department drop-down menu arrow to view options and select a Department.**
- 4. After selecting the Department, the Staff drop-down menu options populate.**
- 5. Click Staff name to make your selection.**
- 6. Click Submit.**

7. After clicking Submit, the Task Details page of the Task displays. Verify assignment.

The screenshot displays the 'Task Details' page for a 'Subdivision Review' task. The left sidebar contains navigation options: Record, Summary, Workflow (highlighted), Workflow History, Documents, and Address. The main content area features a top navigation bar with buttons for SUBMIT, ASSIGN, RESET, CALCULATE HOURS, and HELP. Below this, the task details are organized into a grid. The 'Assigned to Department' is 'Engineering Traffic Manager' and the 'Assigned to' person is 'Kevin Collins', both highlighted with a yellow box. Other fields include 'Current Status' (Additional Information Received), 'Due Date' (01/11/2018), 'Assigned Date' (02/22/2018), 'In Possession Time (hrs)' (0), and 'Status Date' (02/22/2018). At the bottom, there are input fields for 'New Status *' (set to '--Select--'), 'Due Date' (01/11/2018), and 'Status Date *' (02/22/2018), each with a calendar icon.

Task Details - Subdivision Review		Due Date	Assigned Date	In Possession Time (hrs)
Current Status	Additional Information Received	01/11/2018	02/22/2018	0
Assigned to Department	Assigned to		Status Date	
Engineering Traffic Manager	Kevin Collins		02/22/2018	
New Status *	Due Date	Status Date *		
--Select--	01/11/2018	02/22/2018		

Assigning Workflow Tasks Using List View

The screenshot shows a software interface with a 'Tasks' section. On the left, there is a sidebar with a search icon, a grid icon, and two task cards: 'LAND-16 -AMENDPL...' and 'PLAT-16 -TIMEEXT...'. The main area displays a table of tasks with columns for checkboxes, task items, due dates, flags, status, application names, and details. The 'Technical Review ADDR-COD-17-000022' task is checked and has a red '1' next to it. To the right, an 'Actions' menu is open, showing options like 'Assign', 'Claim', 'Release', 'Print', and 'Export to CSV'. A red '2' is above the 'Actions' menu, and a red '3' is next to the 'Assign' option.

<input type="checkbox"/>	Task Item	Due Date	Flags	Status	Application Name	Details
<input type="checkbox"/>	Preliminary Plan Review	7:00 AM Jan 31				LOCATION Board Room
<input checked="" type="checkbox"/> 1	Technical Review ADDR-COD-17-000022	Jan 1	1	Under Review	Patricia's COD	
<input type="checkbox"/>	test	8:00 AM Nov 28				LOCATION Board Room
<input type="checkbox"/>	Zoning Commission	7:00 AM Nov 15				LOCATION Location not defined

- 1. In List View, click the box to the left of the Workflow task item you wish to assign.**
- 2. Click the Actions drop-down menu.**
- 3. Click Assign.**

The screenshot shows a web form titled "Assign" with a yellow header. Below the header are three buttons: "SUBMIT", "RESET", and "HELP". The form contains two dropdown menus: "Department * Current Department" and "Staff * Current User". The "Department" dropdown is currently set to "Engineering Traffic Manager" and has a red circle with the number "1" next to its arrow. The "Staff" dropdown is open, showing options "--Select Staff--" and "Kevin Collins", with a red circle with the number "2" next to "Kevin Collins". To the right of the "Staff" dropdown is a "Check Availability" link. Below the "Department" dropdown is a "Due Date" field with a calendar icon. A red circle with the number "3" is positioned above the "Assign" header.

- 4. Use the Department drop-down menu arrow to view options and select a Department.**
- 5. After selecting the Department, the Staff drop-down menu options populate.**
- 6. Click Staff name to make your selection.**
- 7. Click Submit.**

Record

Summary

Workflow

Workflow History

Documents

Address

Tas

SUBMIT ASSIGN RESET CALCULATE HOURS HELP

Task Details - Subdivision Review

Current Status	Due Date	Assigned Date	In Possession Time (hrs)
Additional Information Received	01/11/2018	02/22/2018	0
Assigned to Department Engineering Traffic Manager	Assigned to Kevin Collins	Status Date 02/22/2018	

New Status *
--Select--

Due Date
01/11/2018

Status Date *
02/22/2018

8. The Task Details page displays. Verify assignment.

Congratulations!

This concludes Module Eight

Assigning Workflow Tasks

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

TEST YOUR RECALL

1. A workflow task can be self-assigned. ____True ____False
2. Assigning workflow tasks is a role-based function. ____True ____False
3. Assignment of Workflow tasks may be done using the Task Card Workflow Options tab. ____True ____False
4. Assignment of Workflow tasks in List View is done using the Actions drop-down menu. ____True ____False
5. Some Workflow tasks in BuildSA are systematically assigned. ____True ____False

Answers on the next slide...



If you answered:

1. True
2. False
3. True
4. True
5. True

You are correct!

Time to begin the next
module...

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