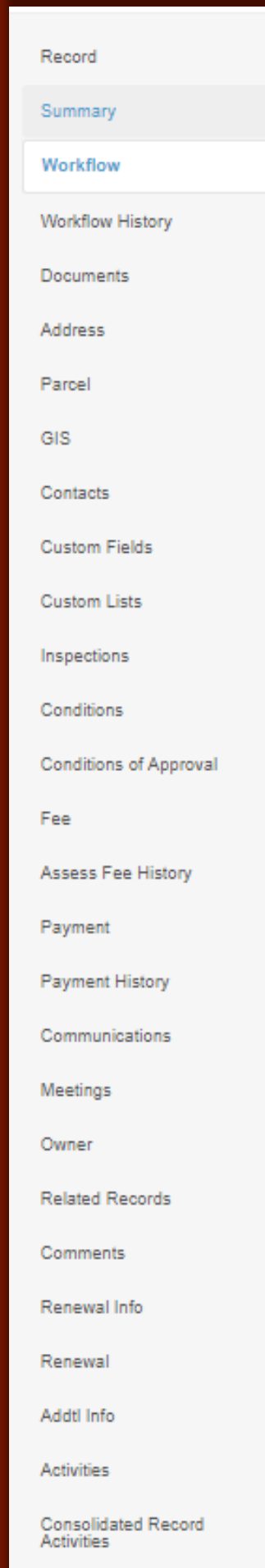


# **On-line Tutorial Series**

## **Module 5**

### ***Updating Records***

***This module contains General Functionality information. For application specific updating of records, please see your Supervisor or BuildSA Change Agent.***



# Update the Record

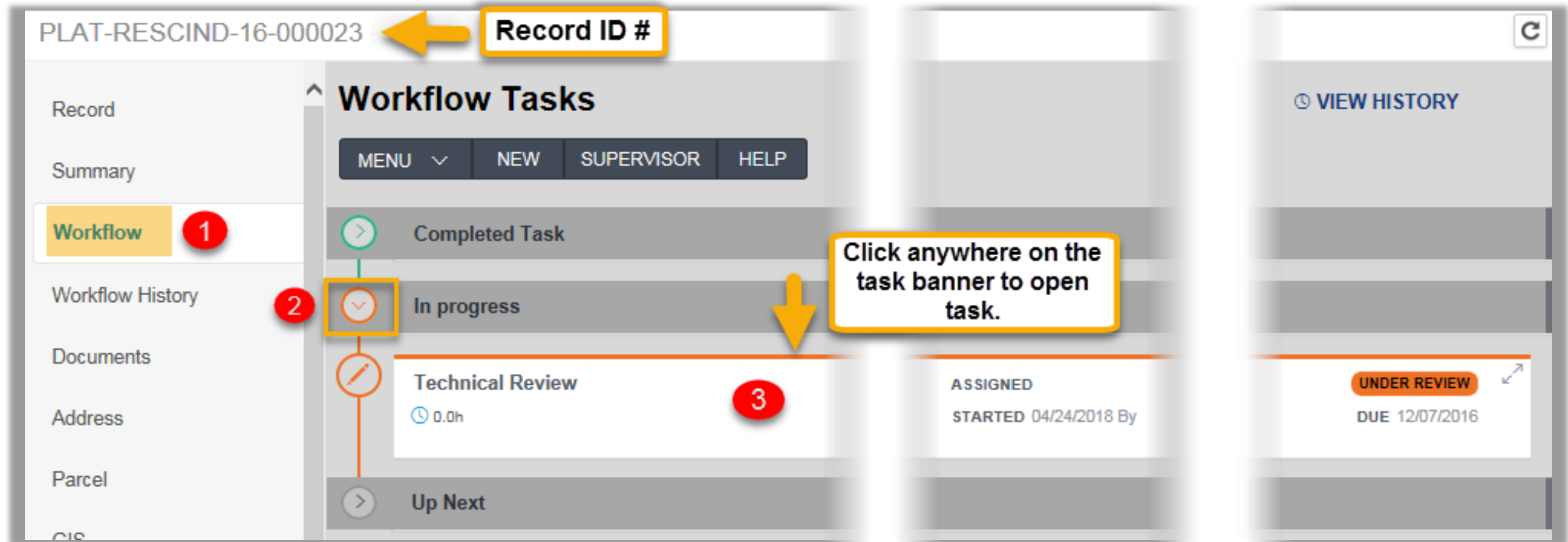
*Based on Business Process Steps*

**Use the Record's navigation bar to navigate within Tabs. The Navigation Bar is the gateway to pages for you to view information, update task(s) and conduct overall management of the Record.**

# Updating Records

- 1. Retrieve the Record, or use the Task Card if assigned a task (review).**
- 2. Update the Record.**
  - Use the Record's Navigation bar to click on the *Workflow* tab.**
- 3. Follow the business process steps to update the the Record.**

# The Record's Workflow Tab



The screenshot displays the 'Workflow Tasks' section for record 'PLAT-RESCIND-16-000023'. The interface includes a left sidebar with navigation options: Record, Summary, Workflow (highlighted with a red circle '1'), Workflow History, Documents, Address, Parcel, and CIS. The main content area shows a vertical flow of task banners: 'Completed Task', 'In progress' (highlighted with a red circle '2'), 'Technical Review' (highlighted with a red circle '3'), and 'Up Next'. A yellow callout box with an arrow points to the 'In progress' banner, containing the text 'Click anywhere on the task banner to open task.' The 'Technical Review' banner shows a duration of '0.0h'. To the right, a detailed view of a task is shown, including the status 'UNDER REVIEW' (in an orange box), 'ASSIGNED', 'STARTED 04/24/2018 By', and 'DUE 12/07/2016'. A 'VIEW HISTORY' link is visible at the top of this detailed view. A yellow box at the top left of the main content area contains the text 'Record ID #' with an arrow pointing to the record ID 'PLAT-RESCIND-16-000023'.

# The Record's Task Details Page

- 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
- Communications
- Meetings
- Owner
- Related Records
- Comments

In progress
ASSIGNED

**Technical Review**

0.0h

STARTED 04/24/2018 by

[Task Details](#) [Sub Tasks](#)

**This is the Record's Task Details page. Update a Record's status here.**

Task Details - Technical Review
Due Date
Assigned Date
In Possession Time (hrs)

Current Status Under Review	12/07/2016	10/26/2018	1.97
Assigned to Department Land Entitlements Planner	Assigned to	Status Date 04/24/2018	

New Status \*

--Select--

Due Date

12/07/2016

Status Date \*

07/03/2018

Action By Department \* **Current Department**

Land Entitlements Ac

Action By \* **Current User**

Patricia Rosas

Comments

**Standard Comment**

check spelling

Display Comment in ACA

Comment Display in ACA

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

Display E-mail Address in ACA

**Display Comment in ACA box is checked by default. This means customer is able to view comments.**

Task specific information

No signature

No payment

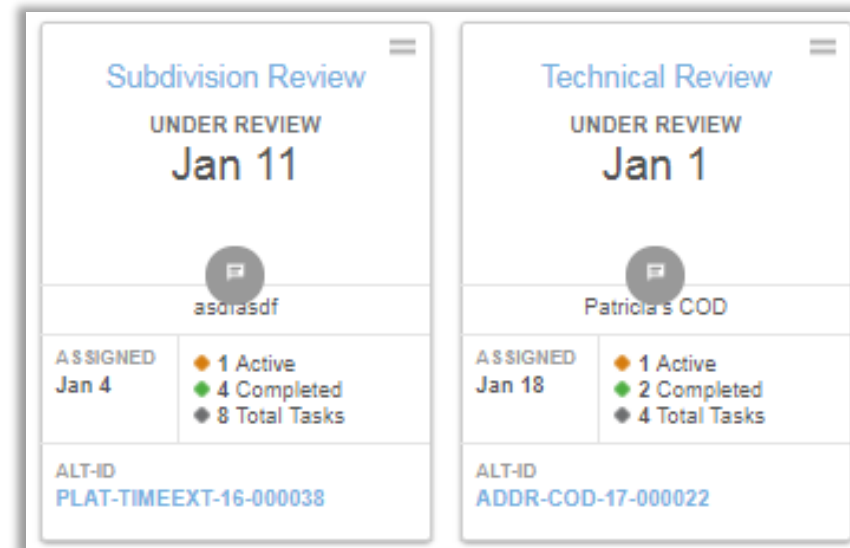
Other

UNDER REVIEW

DUE 12/07/2016

# Updating the Record

**1. If assigned the task, the task card displays on your Home Page.**



**2. Click the *Record ID hyperlink* to open the Record and display Navigation bar.**

**3. From the Record's Navigation bar, click on the Workflow tab.**

**4. Open the task assigned to you by clicking on the task banner.**

**5. Update the record as *per business process instructions*.**

Record ID: PLAT-TIMEEXT-16-000038

Record

Summary

Workflow

1

SUBMIT

ASSIGN

RESET

CALCULATE HOURS

HELP

Task Details - Subdivision Review

Current Status  
Under Review

Due Date  
01/11/2018

Assigned Date  
01/04/2018

In Possession Time (hrs)

Task Details Sub Tasks

2

C

After updating task,  
click the Submit  
button, then click  
Refresh.

***Congratulations!***

***This concludes Module Five***

***Updating Records***

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



# TEST YOUR RECALL

1. Records are updated according to business processes. \_\_\_\_ True \_\_\_\_ False
2. Where is the Workflow Tab of a record found? \_\_\_\_\_
3. The Record's Navigation bar is located on user's Home Page. \_\_\_\_ True \_\_\_\_ False
4. A Record's Navigation Bar is the gateway to pages containing information that allow the user to manage the Record. \_\_\_\_ True \_\_\_\_ False.

*Answers on the next slide...*



1. True
2. Find it on the Record's Navigation Bar.
3. False
4. True

Time to begin the next module...

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

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