

On-line Tutorial Series

Module 5

Updating Records

This module contains General Functionality information. For application specific updating of records, please see your Supervisor.

Update the Record

Accela Civic Platform > COSA

ZONING-ZV-2020-13300026

Menu Save Reset Summary Help

PIN NUMBER: 238596404

Record ID	Record Type	Initiated by Product
ZONING-ZV-2020-13300026	LandDevelopment/Zoning/Zoning Verification	AV360

Status	Opened Date	Expiration Date	Balance
Under Review	01/31/2020		-256.21

Short Notes

Application Name

Cap ID

20CAQ-00000-03735

Navigation bar within a record displays to the right of the main menu.

Use the Record's navigation bar to view record information, update task(s), upload documentation, add fees, view/generate email communication and for overall management of the record.

Updating Records

- 1. Retrieve the Record.**
- 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.**

Record's Workflow Tab

Accela Civic Platform > COSA

ADDR-AVAA-20-10100003 **Record ID #**

Record

Summary

Workflow

Workflow History

Workflow tab displays Completed, In Progress and Up Next tasks.

Workflow Tasks

MENU NEW SUPERVISOR HELP

- Completed Task
- In progress
- Technical Review**
0.0h
ASSIGNED Kimberly Hopkins
STARTED 2/28/2020 By COSA Admin
UNDER REVIEW
DUE 3/13/2020
- Up Next

Banner hyperlink. Click anywhere on it to open Task Details page and update status.

VIEW HISTORY

The Record's Task Details Page

Accela Civic Platform > COSA

ADDR-AVAA-20-10100003

in progress

Technical Review ASSIGNED Kimberly Hopkins STARTED 2/28/2020 by COSA Admin UNDER REVIEW DUE 3/13/2020

0.0h

TASK DETAILS Sub Tasks

SUBMIT ASSIGN RESET CALCULATE HOURS CANCEL HELP

Electronic Document Review (EDR)

Documents for Review Other Documents

Task Details - Technical Review	Due Date	Assigned Date	In Possession Time (hrs)
Current Status Under Review	03/13/2020	02/28/2020	88.64

Assigned to Department: Addressing Planner | Assigned to: Kimberly Hopkins | Status Date: 02/28/2020

New Status * | Due Date: 03/13/2020 | Status Date *: 03/05/2020

Action By Department * | Current Department: | Action By * | Current User:

Comments

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 | Other | Invalid address

Comments

check spelling

This is the record's Task Details page. update your task using the Status drop-down menu.

Comments typed here display on the customer's portal.

'Other' box must be checked for Comments box to become a required field.

Comments typed here display on the email sent to customer.

Updating the Record

The screenshot displays the Accela Civic Platform interface. At the top, it says "Accela Civic Platform > COSA" and "Welcome, Patricia". Below the welcome message, it indicates "You have 62 Tasks". A "FILTER PAGES" dropdown menu is visible. The main content area shows a grid of task cards. Each card displays the task title, a date, the address, workflow status (Total Tasks, Completed, Active), assigned date, and a highlighted "Record ID#".

Task Title	Date	Address	Workflow Status	Assigned Date	Record ID#
Permit Fee Waiver Review	MAR 10	1041 WOODLAWN	10 Total Tasks 4 Completed 1 Active	Mar 5	RES-IMP-APP20-32000626
Completeness Review	MAR 6	807 MISSION	10 Total Tasks 2 Completed 3 Active	Mar 4	RES-IMP-APP20-32000564
Completeness Review Zoning	MAR 5	1901 ALAMO	11 Total Tasks 1 Completed 7 Active	Mar 3	RES-FEN-APP20-31800163

A yellow box highlights the "Record ID#" label, which is positioned between the second and third task cards. A "LOAD MORE" button is located at the bottom right of the task grid.

4. Assignments display on your home page.
5. Click the *Record ID hyperlink* to open the Record.
6. Click the Workflow tab. Open the task assigned to you.
7. Update status as per business process.

Accela Civic Platform > COSA

RES-IMP-APP20-32000564 - 807 MISSION

Record
Summary
Workflow
Workflow History
Documents
Address
Parcel
GIS
Contacts
Professionals
Custom Fields
Custom Lists

SUBMIT ASSIGN RESET CALCULATE HOURS CANCEL HELP

Task Details - Completeness Review
Current Status: Under Review
Due Date: 03/06/2020
Assigned Date: 03/04/2020
In Possession Time (hrs): 12.69

Assigned to Department: Customer Advocate
Assigned to: Patricia Rosas
Status Date: 03/05/2020

New Status *
Approved
Due Date: 03/06/2020
Status Date *
03/05/2020

Action By Department * Current Department: Customer Advocate
Action By * Current User: Patricia Rosas

Comments
Standard Comment
check spelling

Task Details Sub Tasks

8. After selecting updated status click Submit (shown).

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...



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