



On-line Tutorial Series

Module Eight

Updating Tasks in a Record

Adding Workflow Task Comments

Viewing Closed Task Workflow Comments

The Workflow Process

The workflow of a record refers to the set of tasks that is followed by DSD and Partnering Agencies to progress a record (application) from application in-take to closing.

- ♦ **The Workflow functions as an automated to-do list for updating the Record.**

Daily Task Card Assignments

Updating Tasks in a 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 2 Tasks'. The main content area shows two task cards for the 'Wren Project'.

Task Name	Due Date	Workflow	Assigned	ALT-ID	Status
Completeness Review	MAY 19	36 Total Tasks 1 Completed 2 Active	May 14	RES-RBP-APP21-35500371	ADDITIONAL INFORMATION REQUIRED
Permit Issued	MAY 14	14 Total Tasks 4 Completed 1 Active	May 14	MEP-TRD-APP21-33101787	ISSUED

The interface includes a sidebar with navigation icons, a search bar, and a 'FILTER PAGES' dropdown. The bottom of the screen shows 'No More Records'.

- 1. Click the hyperlink of the Task Assignment or the Record ID to access the Record.**

RES-RBP-APP21-35500371 - Wren Project

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

Workflow Tasks

MENU ▾ NEW SUPERVISOR TASK ACTIVATION HELP

Completed Task

In progress

Up Next

Completeness Review 0.0h	ASSIGNED Patricia Rosas STARTED 5/14/2021 By Patricia Rosas	ADDITIONAL INFORMATION REQUIRED DUE 5/19/2021
Completeness Review Zoning 0.0h	ASSIGNED Alexis Sanchez STARTED 5/15/2021 By	UNDER REVIEW DUE 5/19/2021

Task banners

2. Navigate to the Workflow Tab of the Record.

3. Click anywhere on the *In Progress* task banner hyperlink.

The screenshot displays the Accela Civic Platform interface for the COSA system. The main header shows the project ID 'RES-RBP-APP21-35500371 - Wren Project'. A left-hand navigation menu includes options like Record, Summary, Workflow (highlighted), Workflow History, Documents, Address, Parcel, GIS, Contacts, Professionals, Custom Fields, Custom Lists, Inspections, Conditions, and Conditions of Approval. The main content area features a task status bar with 'Completed Task' and 'In progress' sections. The 'In progress' section is active, showing a task titled 'Completeness Review' assigned to Patricia Rosas, with a due date of 5/19/2021 and a status of 'ADDITIONAL INFORMATION REQUIRED'. Below this, a 'Task Details' section includes a 'PLAN ROOM PROJECT' header and a table of task information. A red arrow points to the 'New Status' dropdown menu, which is currently set to '--Select--'. A yellow callout box on the right contains the text: 'Select updated status from the New Status* drop-down menu.' The bottom of the page shows 'Action By Department' and 'Action By' dropdowns.

Task Details - Completeness Review	Due Date	Assigned Date	In Possession Time (hrs)
Current Status Additional Information Required	05/19/2021	05/14/2021	0
Assigned to Department DSD Admin Support	Assigned to Patricia Rosas	Status Date 05/14/2021	
New Status * --Select--	Due Date 05/19/2021	Status Date * 09/03/2021	

4. The Task Details page displays.

RES-RBP-APP21-35500371 - Wren Project

In progress

Record
Summary
Workflow
Workflow History
Documents
Address
Parcel
GIS
Contacts
Professionals
Custom Fields
Custom Lists
Inspections
Conditions
Conditions of Approval
Fee
Assess Fee History
Payment
Payment History
Communications
Meetings
Owner
Related Records
Comments

Completeness Review ASSIGNED Patricia Rosas
STARTED 5/14/2021 by Patricia Rosas

Task Details Sub Tasks

3

SUBMIT ASSIGN RESET CALCULATE HOURS CANCEL HELP

PLAN ROOM PROJECT

Task Details - Completeness Review
Current Status Additional Information Required
Assigned to Department USD Admin Support
Assigned to Patricia Rosas
Status Date 05/14/2021
Due Date 05/19/2021
Assigned Date 05/14/2021
In Possession Time (hrs)

New Status * Due Date 05/19/2021 Status Date * 05/03/2021

Action By Department * Current Department Action By * Current User
DSD Admin Support Patricia Rosas

Comments
 Standard Comment
 1

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

5. Type Workflow Task Comments (#1).

6. Select New Status for Record (#2).

7. Click Submit (#3).

Note: Workflow Comments typed in the Standard Comment field are viewable by Customer by default. To unselect, click the box to the left of Display Comment in ACA (shown). Options may change, dependent on record type.

Adding Workflow Task Comments

Adding Comments to a workflow task is different than adding an internal comment to a Record.

The screenshot displays a software interface for a workflow task. On the left is a navigation menu with options like 'Record', 'Summary', 'Workflow', 'Workflow History', 'Documents', 'Address', 'Parcel', 'GIS', 'Contacts', 'Custom Fields', 'Custom Lists', 'Inspections', 'Conditions', 'Conditions of Approval', 'Fee', 'Assess Fee History', 'Payment', and 'Payment History'. The 'Workflow' option is highlighted. The main content area shows a task titled 'Subdivision Review' with a status of 'In progress' and a duration of '0.0h'. Below the title are buttons for 'SUBMIT', 'ASSIGN', 'RESET', 'CALCULATE HOURS', and 'HELP'. The task details section includes fields for 'Current Status' (Under Review), 'Due Date' (01/11/2018), 'Assigned Date' (01/04/2018), 'Assigned to Department' (Land Entitlements Admin Support), 'Assigned to' (Patricia Rosas), and 'Status Date'. There are also dropdown menus for 'New Status' and 'Action By Department', and date pickers for 'Due Date' and 'Status Date'. At the bottom, there is a 'Comments' section with a 'Standard Comment' text area, a 'check spelling' link, and several checkboxes for 'Display Comment in ACA' and 'Display E-mail Address in ACA'. Underneath, there are checkboxes for 'Comment Display in ACA' with options for 'All ACA Users', 'Record Creator', 'Licensed Professional', and 'Contact'. The 'Standard Comment' text area and the 'Display Comment in ACA' checkbox are highlighted with a yellow border.

Comments to workflow tasks are added while the task is updated.

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

SUBMIT

ASSIGN

RESET

CALCULATE HOURS

CANCEL

HELP

PLAN ROOM PROJECT

Task Details - Completeness Review

Current Status

Additional Information Required

Due Date

05/19/2021

Assigned Date

05/14/2021

In Possession Time (hrs)

0

Assigned to Department

DSD Admin Support

Assigned to

Patricia Rosas

Status Date

05/14/2021

New Status *

--Select--

--Select--

Additional Information Received

Additional Information Required

Approved

Denied

Under Review

Withdrawn

Due Date

05/19/2021

Status Date *

09/03/2021

Department Action By * Current User

--Select--

Patricia Rosas

--Select--

Note: The New Status drop-down menu displays several update options for the task. New Status options are business process and record type dependent.

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

New Status *
Additional Info ▼ **1**

Due Date
01/11/2018

Status Date *
02/22/2018

Action By Department * Current Department
Land Entitlements A▼

Action By * Current User
Patricia Rosas ▼

Comments
Standard Comment

check spelling

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 **2**

No signature No payment Invalid address

Invalid Legal Description Other

Comments

check spelling

Note: If the status of *Additional Information Required* is selected, then a reason must be checked in the Task Specific Information area. Task Specific Information areas are record type dependent.

RES-RBP-APP21-35500371 - Wren Project

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Professionals

Custom Fields

Completed Task

In progress

Completeness Review ASSIGNED Patricia Rosas
 0.0h STARTED 5/14/2021 by Patricia Rosas **ADDITIONAL INFORMATION REQUIRED** DUE 5/19/2021

Task Details Sub Tasks

SUBMIT ASSIGN RESET CALCULATE HOURS CANCEL HELP

PLAN ROOM PROJECT

Task Details - Completeness Review

Current Status	Due Date	Assigned Date	In Possession Time (hrs)
Additional Information Required	05/19/2021	05/14/2021	0
Assigned to Department DSD Admin Support	Assigned to Patricia Rosas	Status Date 05/14/2021	

New Status *
 Additional Information Required

Due Date 05/19/2021 Status Date * 09/03/2021

Note: The updated task status now displays on the upper right-hand corner of the Task Banner.

Viewing Workflow Task Comments

Viewing previously closed workflow tasks and reading Internal Comments may be helpful while updating a current task.

Accela Civic Platform > COSA

COM-PRJ-APP21-39800166 - Complex Plans

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

Workflow Tasks

VIEW HISTORY

MENU NEW SUPERVISOR TASK ACTIVATION HELP

Completed Task

Application Intake 0.0h	ASSIGNED STARTED 1/29/2021 By Karthik Selvaraj	RECEIVED DUE 1/29/2021
Completeness Review 0.0h	ASSIGNED Karthik Selvaraj STARTED 1/29/2021 By Karthik Selvaraj	APPROVED DUE 2/3/2021
Completeness Review Zoning 0.0h	ASSIGNED Karthik Selvaraj STARTED 1/29/2021 By Karthik Selvaraj	APPROVED DUE 2/3/2021
Fee Waiver Review 0.0h	ASSIGNED STARTED 1/29/2021 By Karthik Selvaraj	NOT APPLICABLE DUE 2/1/2021

- 1. From the Record's navigation bar, click the Workflow Tab.**
- 2. Click the Completed Task banner.**

Accela Civic Platform > COSA

COM-PRJ-APP21-39800166 - Complex Plans

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

Workflow Tasks

MENU NEW SUPERVISOR TASK ACTIVATION HELP

Task banners

VIEW HISTORY

Completed Task

Application Intake	ASSIGNED	STARTED 1/29/2021 By Karthik Selvaraj	RECEIVED	DUE 1/29/2021
Completeness Review	ASSIGNED Karthik Selvaraj	STARTED 1/29/2021 By Karthik Selvaraj	APPROVED	DUE 2/3/2021
Completeness Review Zoning	ASSIGNED Karthik Selvaraj	STARTED 1/29/2021 By Karthik Selvaraj	APPROVED	DUE 2/3/2021
Fee Waiver Review	ASSIGNED	STARTED 1/29/2021 By Karthik Selvaraj	NOT APPLICABLE	DUE 2/1/2021

3. All Completed tasks display. Click the banner of the Completed Task you wish to view.

Accela Civic Platform > COSA

COM-PRJ-APP21-39800166 - Complex Plans

Note: Page is read-only.

CANCEL HELP

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Professionals

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Task Details: Completeness Review Zoning

Current Status	Status Date	In Possession Time (hrs)
Approved	01/29/2021	0.1

Action By: Karthik Selvaraj Action by Department: System Administrators

Assigned to: Karthik Selvaraj Assigned to Department: System Administrators

Assigned Date: 01/29/2021 Due Date: 02/03/2021

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	Invalid address
Requested Documents	Other	Comments
Total DocType: 83	Requested Document List	Updated Document List



4. The Task Details page of the closed task displays. Scroll to the Comments section to view comments.



This concludes Module Eight

Updating Tasks in a Record

Adding Workflow Task Comments

Viewing Closed Task Workflow Comments