

On-line Tutorial Series Module Eight

Updating Tasks in a Record Adding Workflow Task Comments Viewing Closed Task Workflow Comments



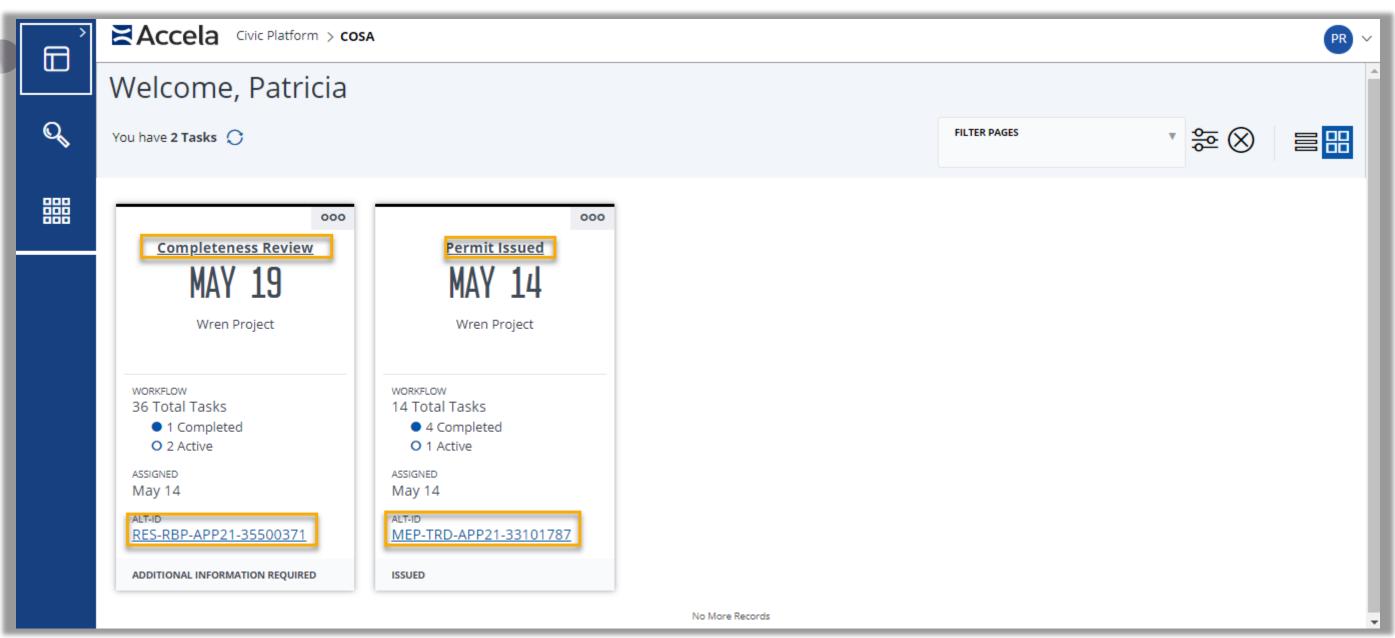
The Workflow Process

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.

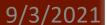
 The Workflow functions as an automated to-do list for updating the Record.

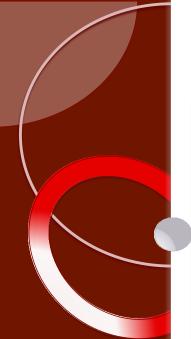


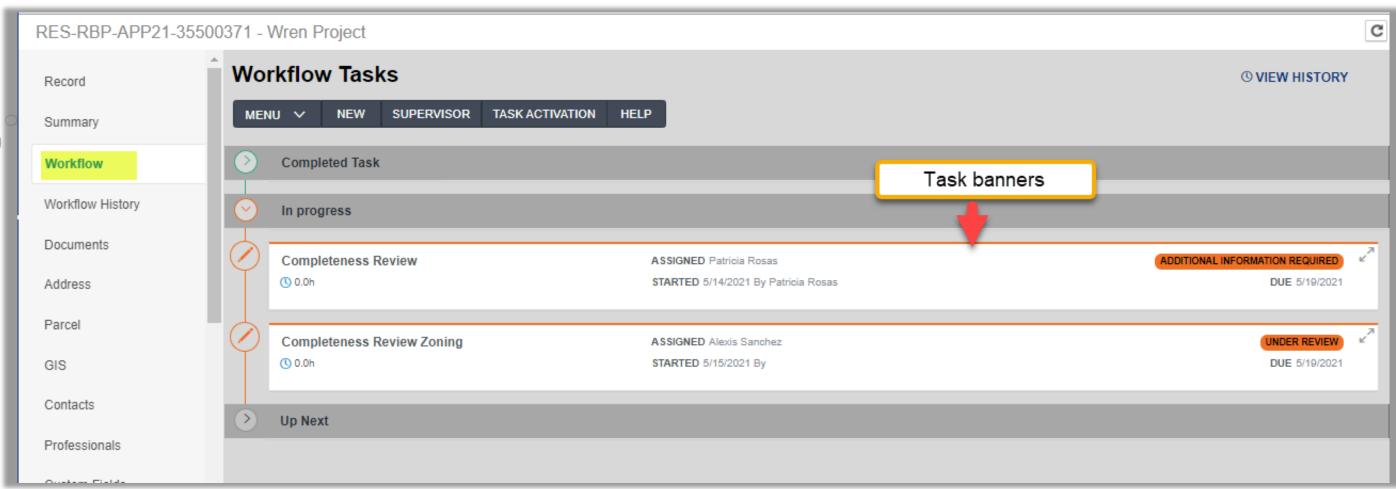
Daily Task Card Assignments Updating Tasks in a Record



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

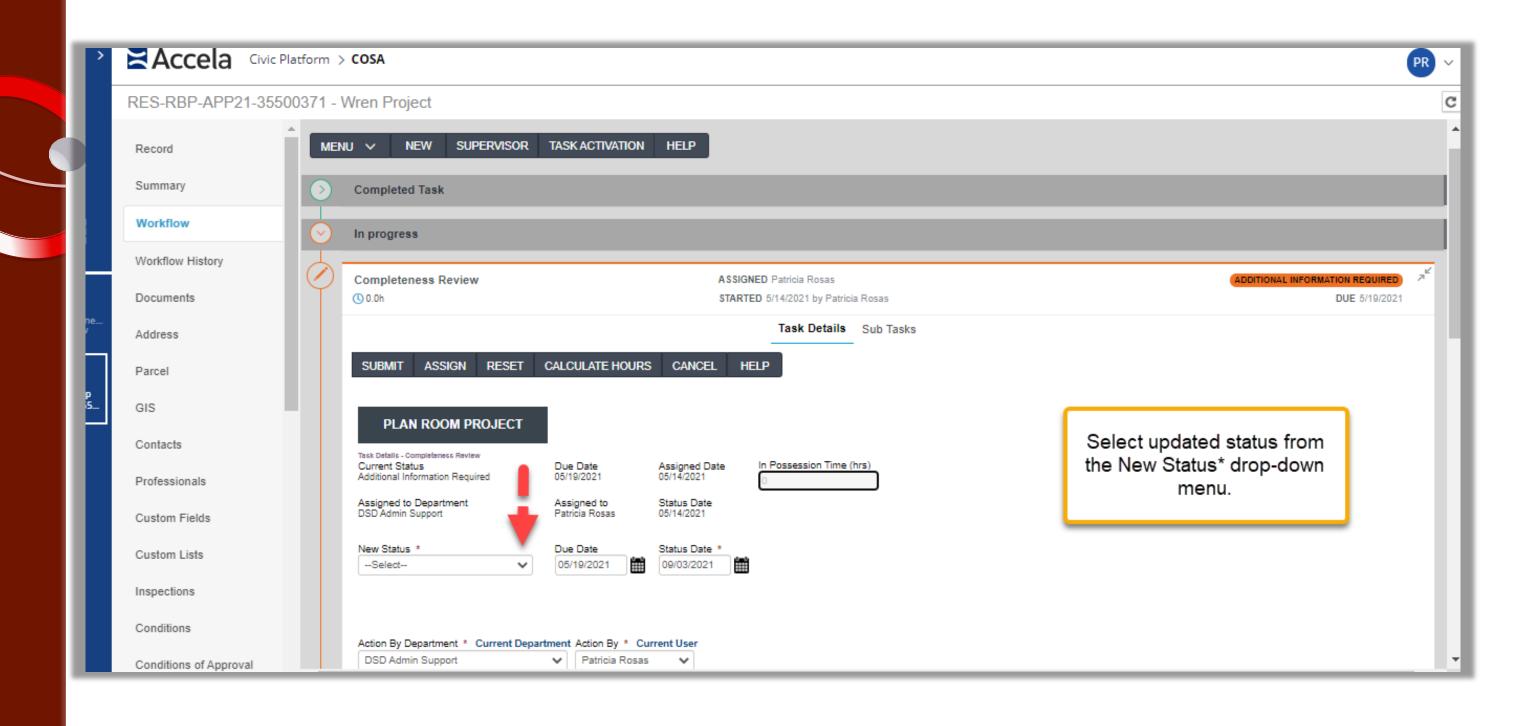




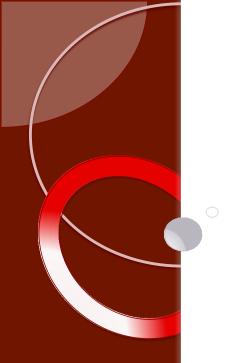


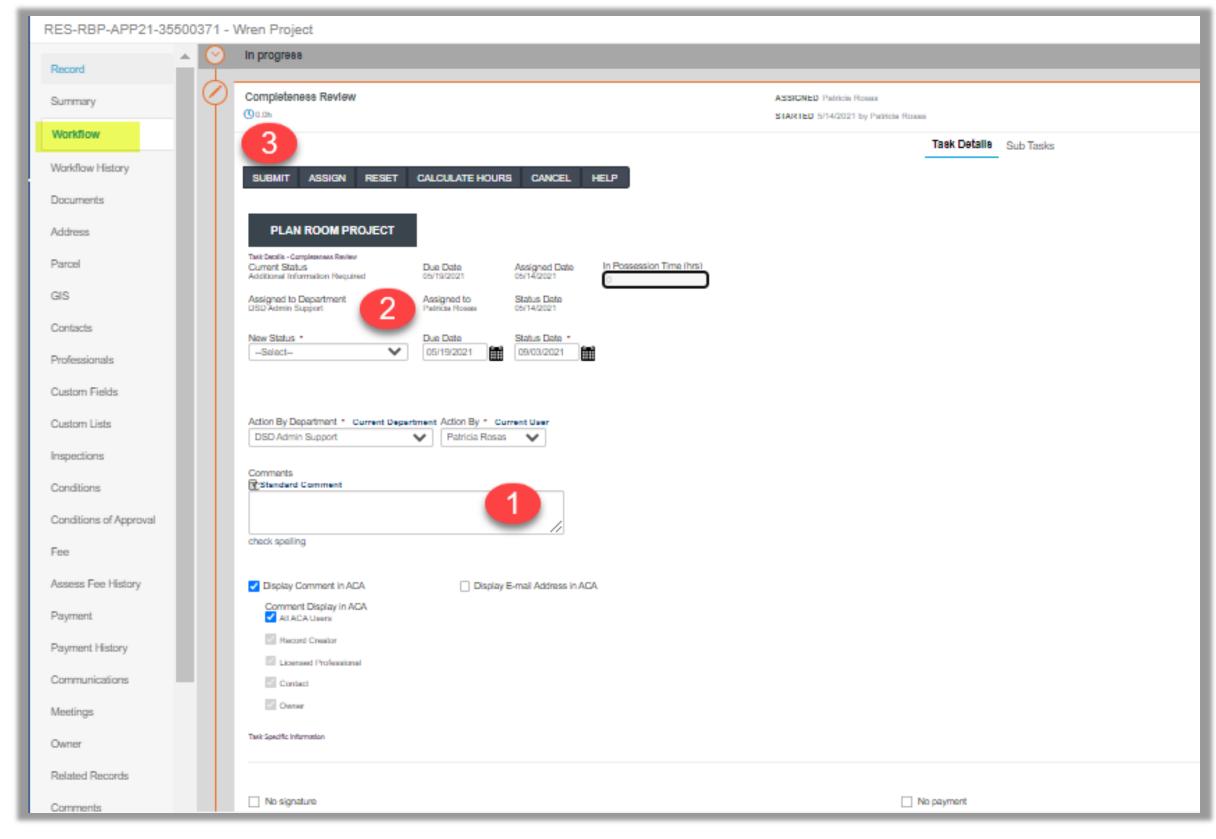
- 2. Navigate to the Workflow Tab of the Record.
- 3. Click anywhere on the *In Progress* task banner hyperlink.



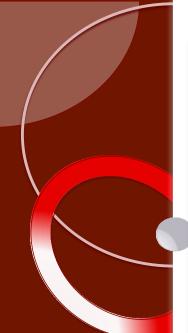


4. The Task Details page displays.





- 5. Type Workflow Task Comments (#1).
- 6. Select New Status for Record (#2).
- 7. Click Submit (#3).



П	RES-RBP-APP21-35500371 - Wren Project					
ı	Record	Comments Standard Comment				
ı	Summary		//			
ı	Workflow	check spelling				
ı	Workflow History	✓ Display Comment in ACA	isplay E-mail Address in ACA			
	Documents	Comment Display in ACA All ACA Users				
	Address	Hacord Creator Licensed Professional				
ı	Parcel	Contact				er' is checked,
ı	GIS	Comer				ts box becomes a
ı	Contacts	Task Specific Information Ma	ke selection,		req	uired field.
ı	Professionals		necessary.			
ı	Custom Fields	☐ No signature		☐ No paymen	4	☐ Invalid address Comments
ı	Custom Lists	Administrative Exception Approval Approved Plan Approved Plans		_ Other		
ı	Inspections	Approved Support Documents Bexar County Septic Permit				check spelling
ı	Conditions	□ Certificate of Determination □ Construction Plan □ Fire Flow Test Report				
ı	Conditions of Approval	Flood Plain CLOMR/LOMR Habitat Compliance Form HDRC- Certificate of Appropriateness		_		
	Fee	✓ Requested Documents				
П	Assess Fee History			Requested Doc Construction Ps and Manual S, 5	n. Manual J	
	Payment			Postderibil Win Schedule	low Door	
	Payment History			check spelling		
	Communications					

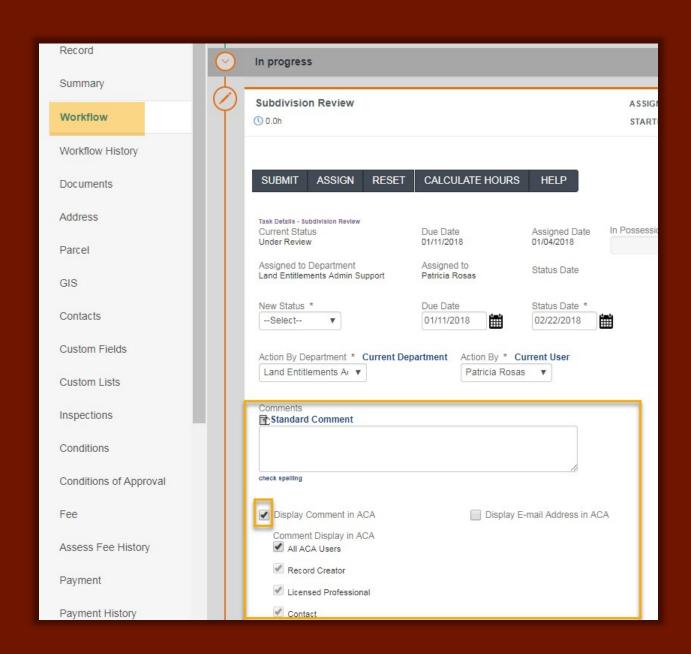
Note: Workflow Comments typed in the Standard Comment field are viewable by Customer by default. To unselect, click the box to the left of Display Comment in ACA (shown). Options may change, dependent on record type.



Adding Workflow Task Comments

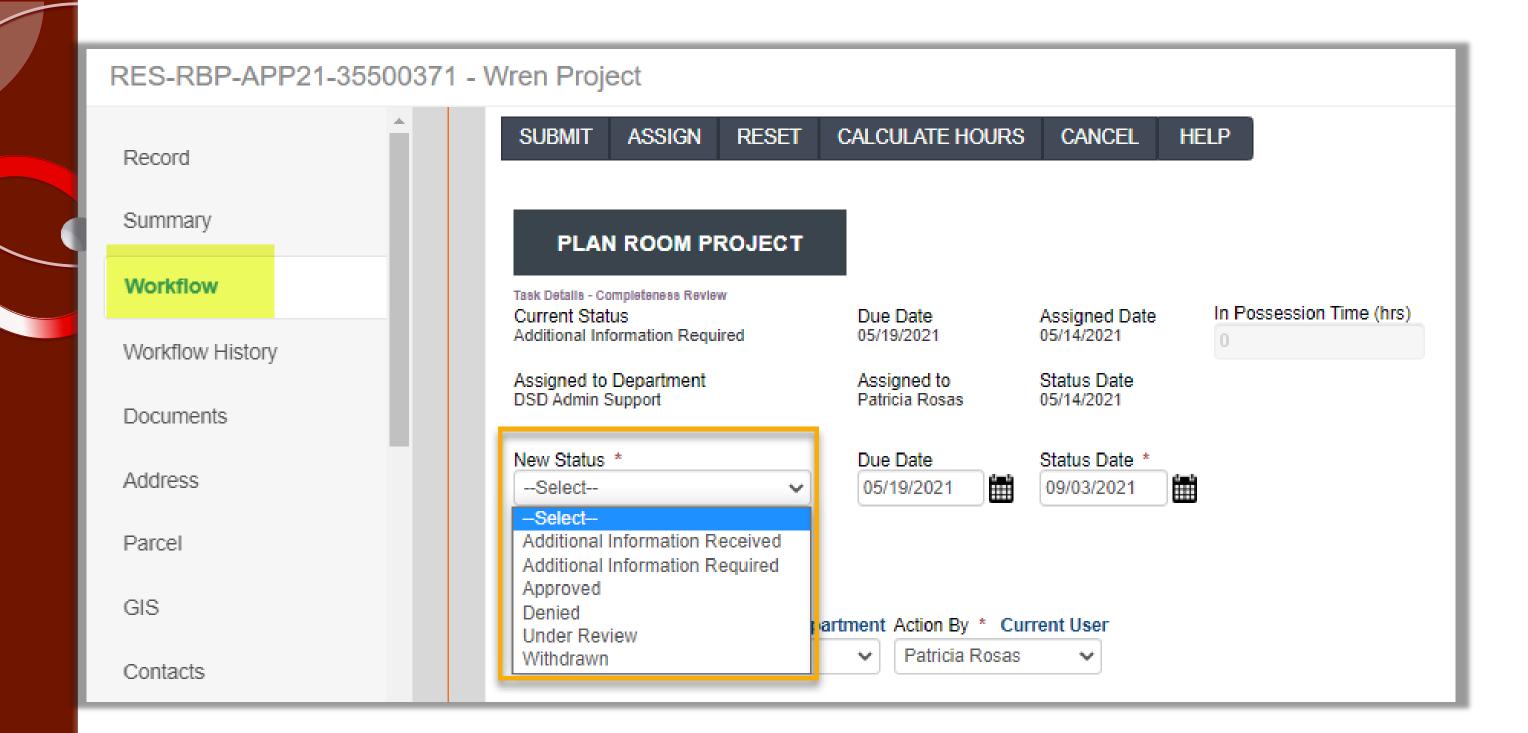
Adding Comments to a workflow task is different than adding an internal

comment to a Record.



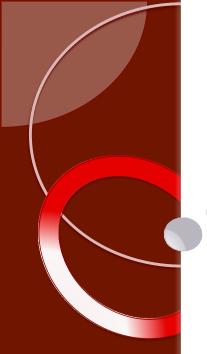
Comments to workflow tasks are added while the task is updated.





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

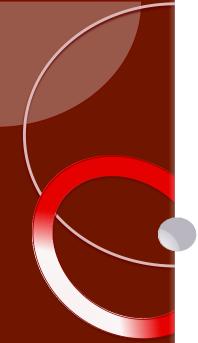


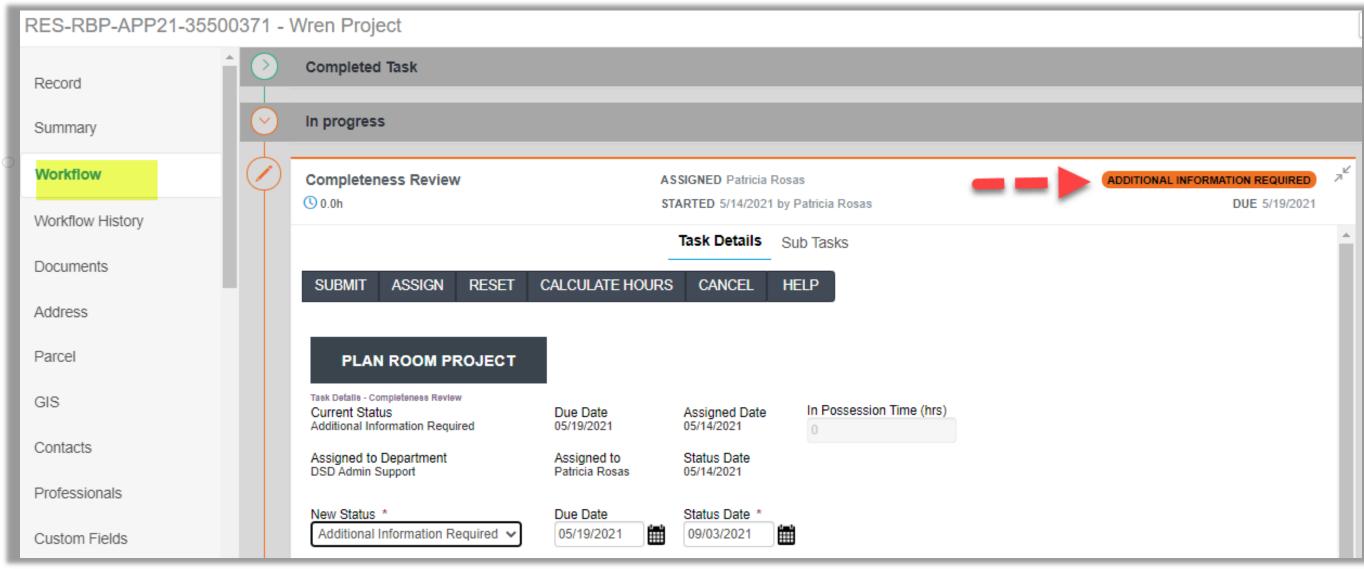


Record	New Status * Additional Info Due Date 01/11/2018	Status Date * 02/22/2018	
Summary	Action By Department * Current Department Action By * C	Turrent User	
Workflow	Land Entitlements A₁ ▼ Patricia Rosa		
Workflow History	Comments Standard Comment		
Documents			
Address	check spelling		
Parcel	✓ Display Comment in ACA □ Display E	E-mail Address in ACA	
GIS	Comment Display in ACA ✓ All ACA Users		
Contacts	Record Creator		
Custom Fields	✓ Licensed Professional ✓ Contact		
Custom Lists	✓ Owner		
Inspections	Task Specific Information	2	
Conditions			
Conditions of Approval	☐ No signature	☐ No payment	Invalid address
Fee	☐ Invalid Legal Description	Other	Comments
Assess Fee History			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.







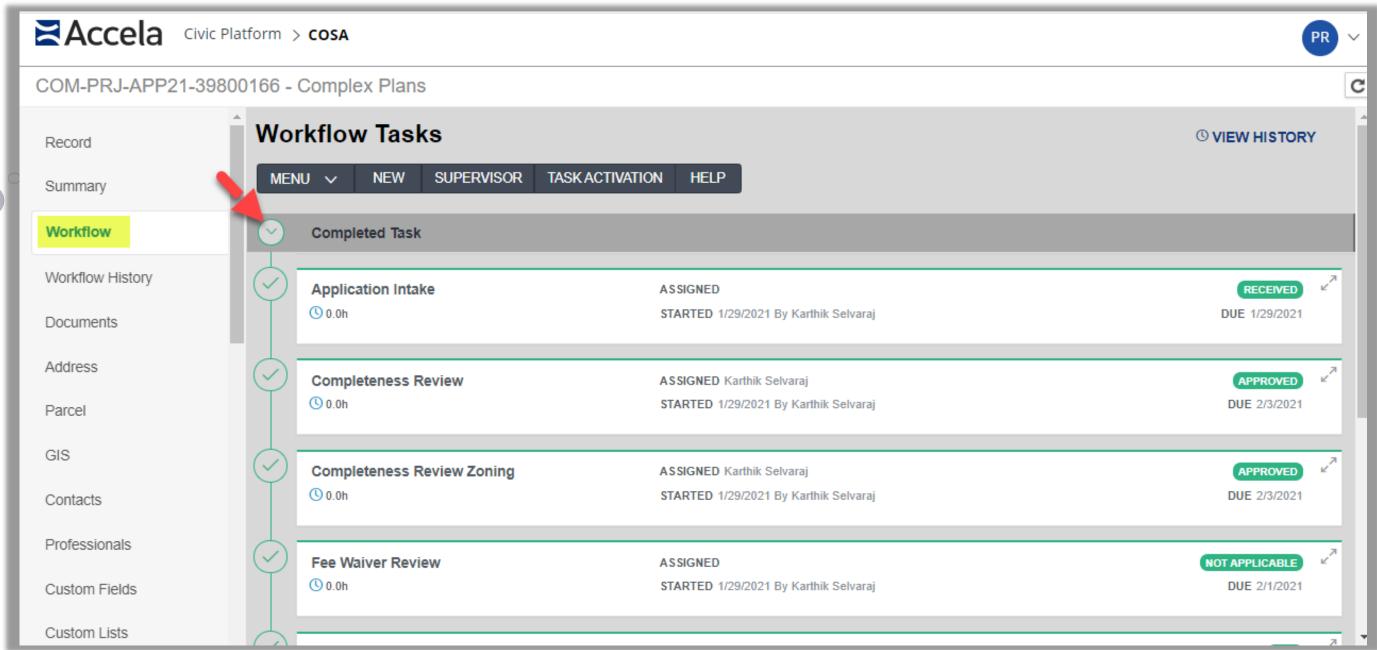
Note: The updated task status now displays on the upper right-hand corner of the Task Banner.

Viewing Workflow Task Comments

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

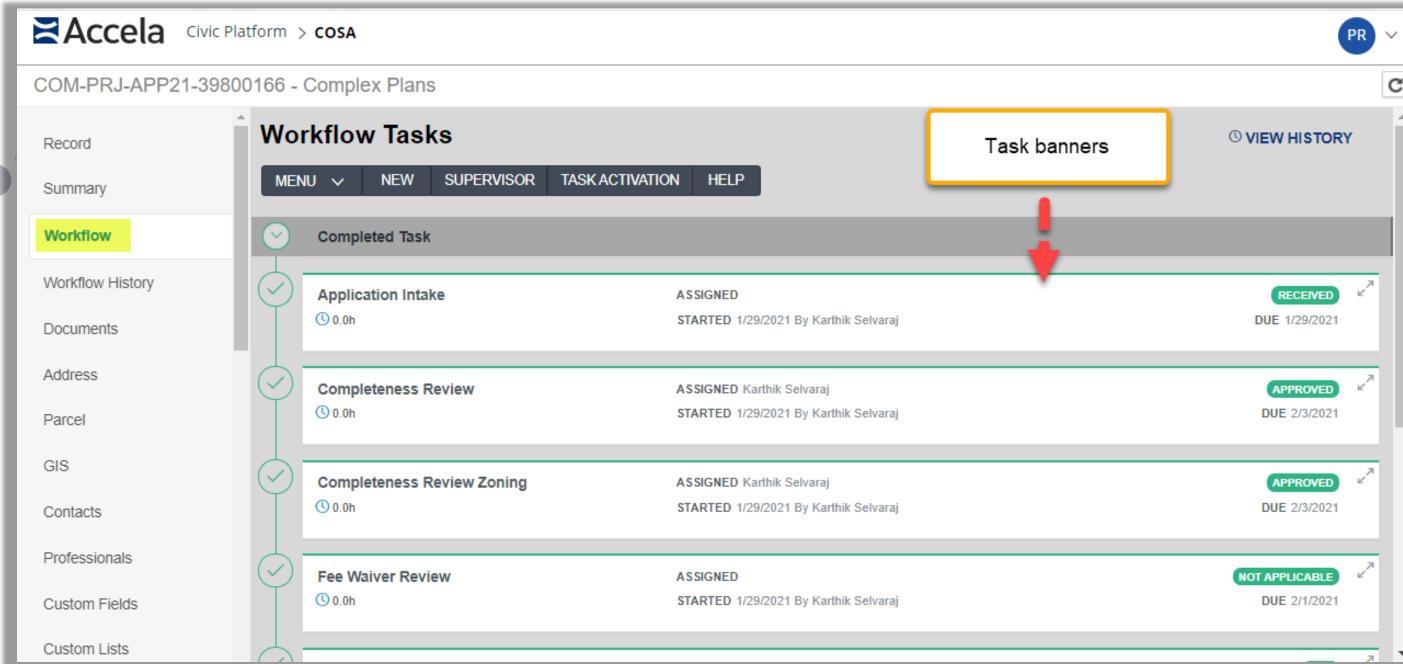






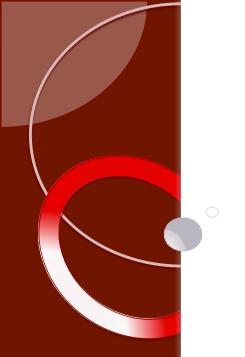
- 1. From the Record's navigation bar, click the Workflow Tab.
- 2. Click the Completed Task banner.

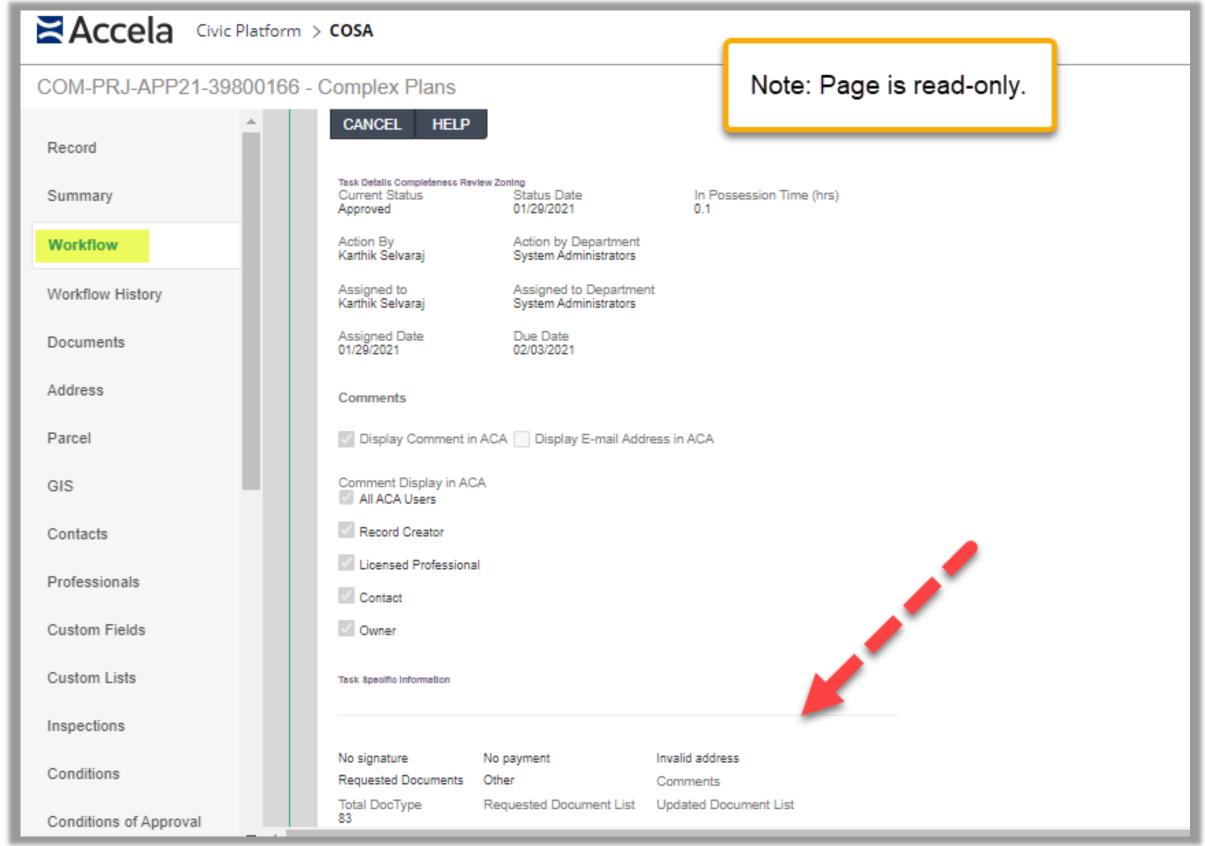




3. All Completed tasks display. Click the banner of the Completed Task you wish to view.







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





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