

New Workflow Redesign – Workflow Card View

Introduction

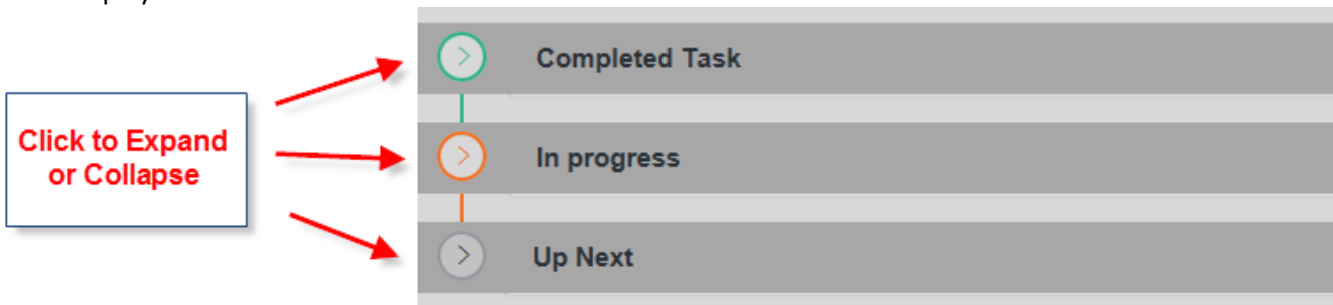
Accela redesigned the workflow in 9.0, now called **Workflow Card View**. The new design can only be seen in the New UI. You will see the original workflow design when using the Old UI. All tasks and functionality is still the same but the look and feel and navigation is different.

[Additional Training Video from Accela](#) (4:33 minutes)

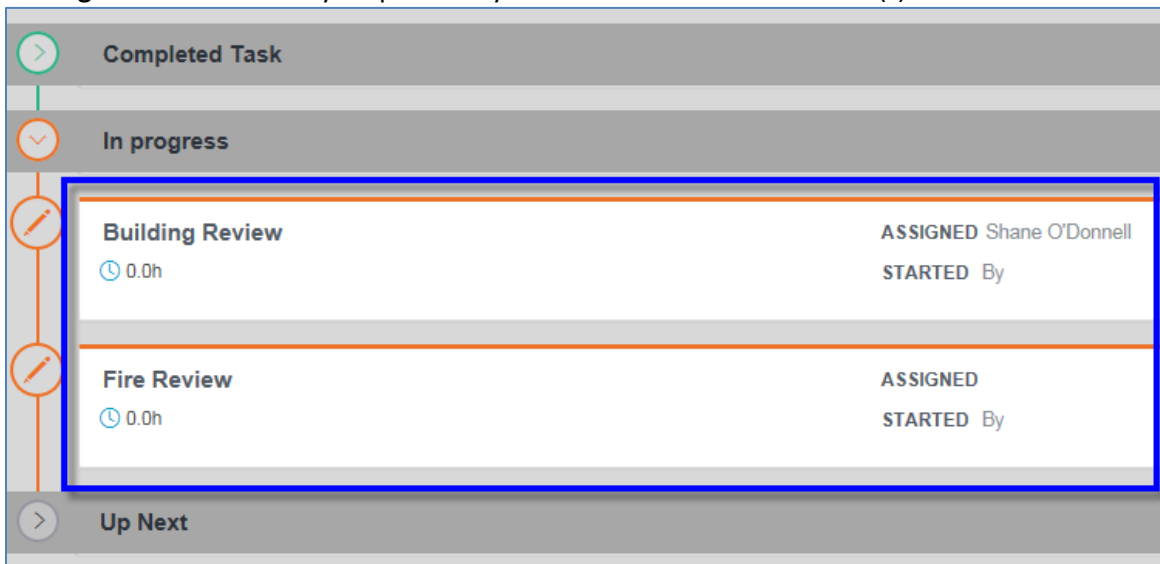
Summary Card View

The **Summary Card View** is designed to display only important information up front without showing every detail of the whole workflow. The **Summary Card View** shows 3 sections, where each task in the workflow resides. Each of these sections can be easily expanded and collapsed.

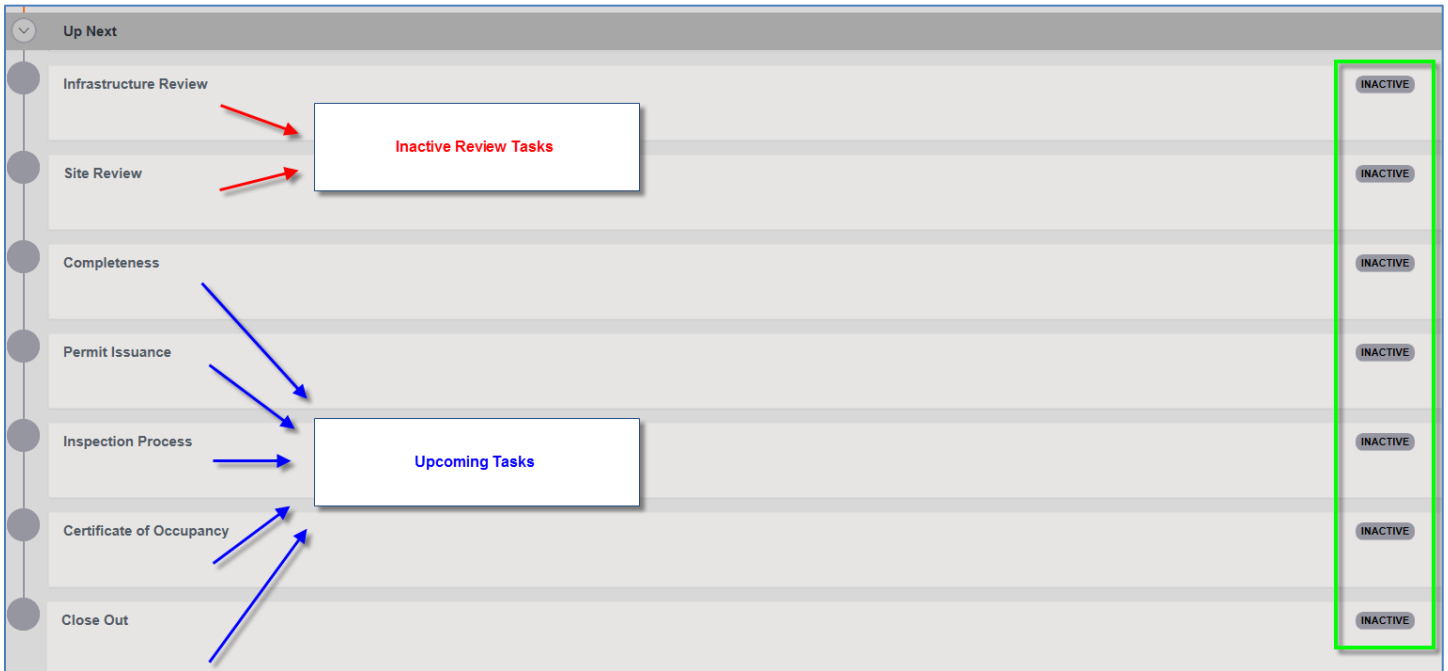
- 1. Completed Task**
Displays tasks that are complete.
- 2. In Progress**
Displays tasks that are active.
- 3. Up Next**
Displays tasks that are inactive.



The **In Progress** section is always expanded by default to show the active task(s).



The **Up Next** section includes all inactive tasks that occur further on in the workflow process as well as inactive tasks that were skipped, such as Review tasks that were not needed for the scope of work.



Detail Card View

The **Detail Card View** displays all information related to the specific task, including TSI fields. Use the **Detail Card View** to view task information or update the task status. This is the same information functionality that was displayed in the old workflow design after selecting an active task. The look and feel is different.

Building Review

0.0h

ASSIGNED Shane O'Donnell

STARTED by

Task Details Sub Tasks (0)

MENU ▾
SUBMIT
ASSIGN
RESET
CALCULATE HOURS
HELP

Task Details - Building Review

Assigned to Shane O'Donnell	Assigned to Department State ePermitting	Assigned Date 07/31/2017	Status Date
Current Status	Action By Department	Action By	
In Possession Time (hrs)	Time Tracking Start Date		

New Status *

--Select-- ▾

Action By Department * **Current Department**

State ePermitting ▾

Status Date *

08/02/2017

Action By * **Current User**

Heidi Shamberger ▾

Display E-mail Address in ACA

Display Comment in ACA

Comment Display in ACA

All ACA Users

Record Creator

Licensed Professional

Contact

Owner

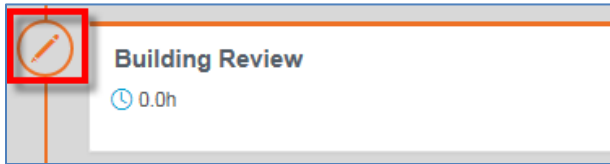
Comments and Conditions

Standard Comment

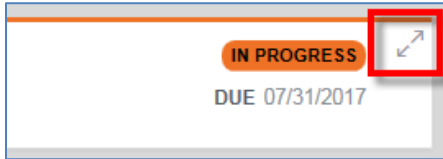
[check spelling](#)

Open the **Detail Card View** in multiple ways:

1. Click the **Edit** icon.



2. Click the **Expand** icon.

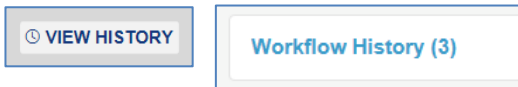


3. Click on the **Task**.



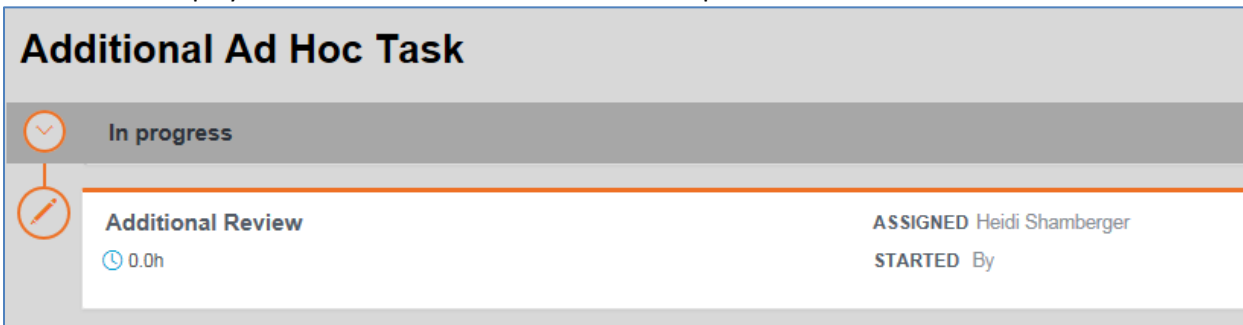
Workflow History

To see the previous status history, click on **VIEW HISTORY** in the upper right corner or navigate to the **Workflow History** page.



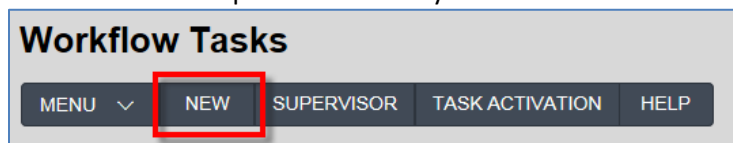
Adhoc Tasks

Adhoc Tasks display underneath the workflow tasks in a separate section.



Create an **Adhoc Task** in a couple different ways:

1. Click **New** at the top of the Summary Card View.



2. Once an Adhoc Task is added to the workflow, click the **NEW AD HOC TASK** link.

