

Using Workflow Time Tracking

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Agenda

- Why Use Workflow Time Tracking
- Time Tracking Vs Time Accounting
- Setting Up Time Tracking
- Creating A Possession Time Clock
- Reporting
- Demonstration



Workflow Time Tracking

- Workflow Time Tracking can help determine where an agency can improve efficiency, or whether external entities may be causing slowdowns in the application process
- Agencies can track the In Possession Time of an Application rather than Overall Application Time
- Version 6.4

Number: 14BRN-00000-00013

Menu ▾ New Modify Tasks (Supervisor) Help

Go To ▾ Permit Summary Workflow Workflow History Audit Trail (2) Calendar Documents (4) Fee (1) Inspections (0) Related Communications (1)

Workflow Tasks

- ✓ Submittal [In Possession Time: 0.05 hrs]
- ✓ Distribution [In Possession Time: 0.02 hrs]
- Building [In Possession Time: 0 hrs]
- Fire [In Possession Time: 0 hrs]
- Planning [In Possession Time: 0 hrs]
- Public Works [In Possession Time: 0 hrs]
- Utilities [In Possession Time: 0 hrs]
- Arborist [In Possession Time: 0 hrs]
- Plans Coordination
- Issuance

Task	Status	Date	Staff
Submittal	Accepted	05/18/2015	Bo Adams
Distribution	Routed for Review	05/18/2015	Bo Adams
Building			
Fire			
Planning			
Public Works			
Utilities			
Arborist			
Plans Coordination			
Issuance			



Time Tracking Vs Time Accounting

Time Tracking– Possession Time (Departments)

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Inspection			


Time Accounting:

Tracks the amount of time spent in performing your daily activity by hourly rates and costs of materials used (Asset Management - Vehicles)

Submit Reset Add Delete Help


☐ Select All

☒

User ID 

ADMIN

Date Logged *

12/03/2013 

Created By

ADMIN


Created Date

12/03/2013

Entity Type

N/A

Reference Record *

13CAP-00000916 

Entity

--Select--

Time Accounting Group *

--Select--

Time Accounting Type *

--Select--

Start Time

AM/PM Current Time

AM

End Time

AM/PM Current Time

AM

Hourly Rate *

0

Cost *

0

Billable *

Percent *

0

Time Elapsed *

Detail Time Elapsed

No Pay: ☐ ☐


Regular Time Time: ☐ ☐

Overtime: ☐ ☐

Holiday: ☐ ☐

Christmas: ☐ ☐

Notation



Start Miles

End Miles

Total Miles

Cost Of Materials

Vehicle ID

Materials

check spelling

Equipment/Materials [Add](#) [Remove](#)

<input type="checkbox"/> Cost Type *	Cost Item *	Unit Rate1	Quantity9	Unit of Measure	Fixed Rate	Cost Date
0 record(s) found.						

Setting Up Time Tracking

Standard Choices

- APPLICATION_TYPE_SECURITY_FID (0245, 8132)
- LONG_TERM_TIME_TRACKING

Standard Choices Item - Edit

Use this form to set up a Standard Choices Item.

Standard Choices Item Name: APPLICATION_TYPE_SECURITY_FID

Description: (250 char max) APPLICATION_TYPE_SECURITY_FID

Status: ☒ Enable ☐ Disable

Standard Choices Value	Value Desc	Active
0245	Long Term Time Tracking	<input checked="" type="checkbox"/> Delete
8132	Workflow, Workflow History	<input checked="" type="checkbox"/> Delete

[Update](#) [Add](#) [Cancel](#)

Standard Choices Item Name: LONG_TERM_TIME_TRACKING

Description: (250 char max) Sets start and stop time of day for MOU calculation of elapse days

Status: ☒ Enable ☐ Disable

Standard Choices Value	Value Desc	Active
OFF_DUTY_TIME	18:00	<input checked="" type="checkbox"/> Delete
ON_DUTY_TIME	06:00	<input checked="" type="checkbox"/> Delete

Setting Up Time Tracking

Record Type Security

The screenshot shows the 'Record Type Security' configuration window. The left sidebar contains a navigation tree with the following items:

- Administration
- Agency Profile
- Application
 - ASI Form Layout Editor
 - ASI Lookup Tables
 - ASI Security
 - Default Clone Options
 - Expression Builder
 - License Verification
 - Record Type Security
 - Set Type
 - Shared Drop-Down List
- Assets
- Parcels
- Calendars
- Communication Manager
- Conditions
- Contact
- License Certifications
- Data Filter & Query
- Drill Down
- Finance
- Inspection
- Part
- Report
- Structures & Establishments
- System Tools
- Workflow & Activity
- Work Orders
- Costing
- Time Accounting

The central pane displays a hierarchical tree of record types under the 'Record Type' header:

- Building
 - Air Quality
 - Boiler
 - Bond
- Building Dept
 - Commercial
 - Addition
 - CO
 - Fence
 - Multi-Use
 - Industrial
 - NA
 - Reroof
 - Residential
- Building Permit
- Business License
- Demolition Permit
- Design Review
- Driveway
- Electrical Permit
- Elevator Permit

The right pane contains the following sections:

New

Assign Remove Help

Permissions

Name	Type
FLAGSTAFF	Agency

Submit Help

Record Access

Full Access of application type

Full Access

Access	Record Type
Full	0245 - Long Term Time Tracking
Full	8090 - Workflow Supervisor
Full	8110 - Application Comments
Full	8132 - Workflow
Full	8143 - Scheduling Inspections

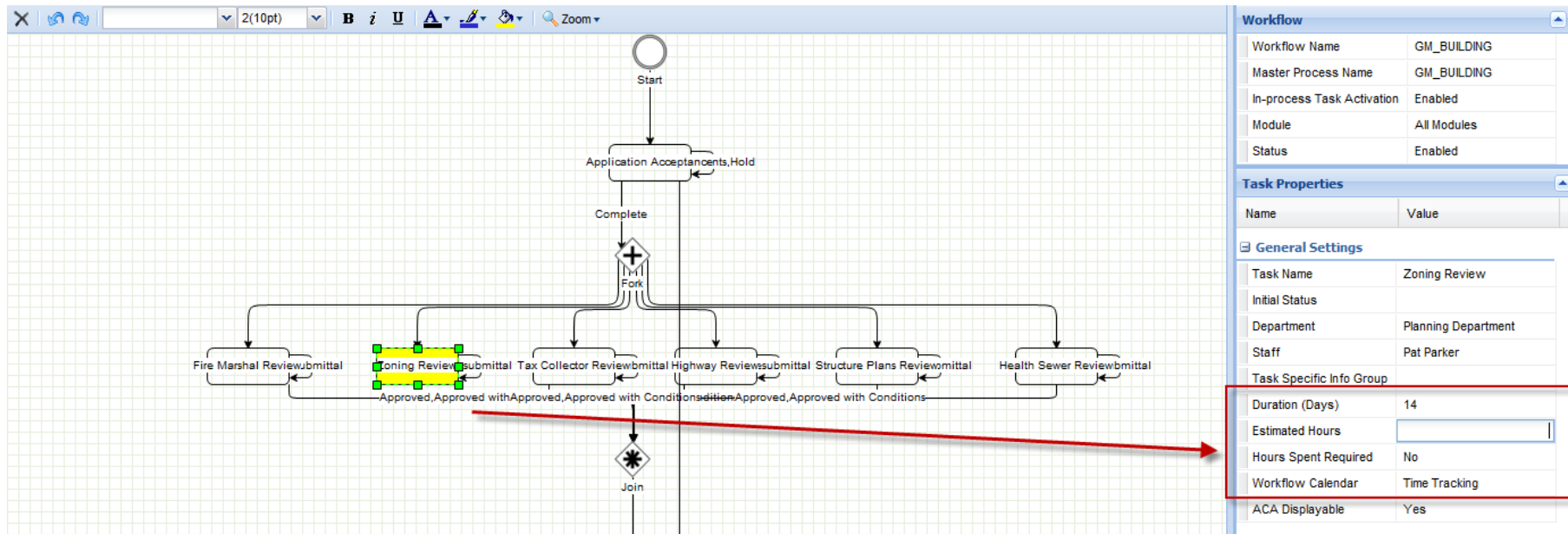
Unassigned

Access	Record Type
--Select--	8400 - Manage Inspections

Access	Record Type
Full	8073 - Application Specific Information
Full	8104 - Assess Fees
Full	8112 - Cloning
Full	8141 - Application Status
Full	8207 - Workflow Ad-Hoc Tasks

Setting Up Time Tracking

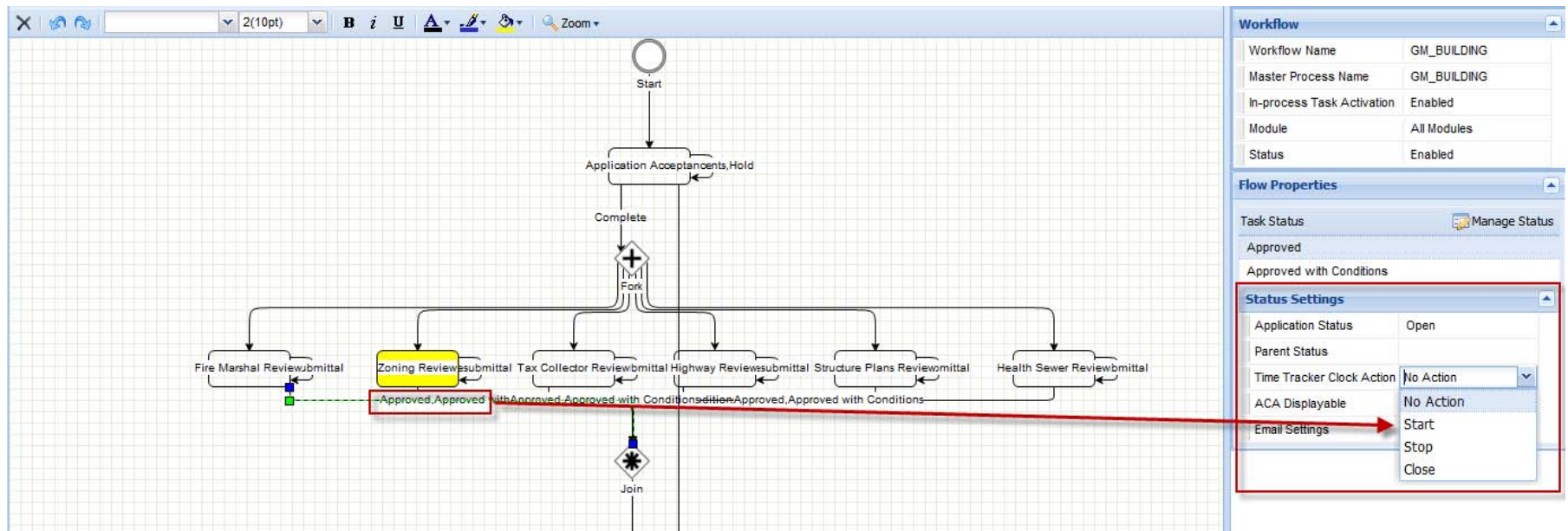
Workflow – Updating each Task based on Business Requirement



- Duration (Days)
- Estimated Hours
- Workflow Calendar Setup

Possession Time Clock

Workflow – Tasks Linked to Clock Action (On/Off)



Possession Time Clock Actions

No Action: No effect on the Time Clock.

Start: Starts the Time Clock, using the current date and time as the start time.

Stop: Stops the Time Clock, but does not reset it.

Close: Resets the Time Clock to null and computes the In Possession time for the application.

Possession Time Clock

Workflow History

Number: 14BRN-00000-00013

Menu Submit Assign Reset Calculate Total Time Cancel Help

Task Details Sub Tasks (0)

Workflow Tasks

- Submittal [In Possession Time: 0.05 hrs]
- Distribution [In Possession Time: 0.02 hrs]
- Building [In Possession Time: 0.38 hrs]
- Fire [In Possession Time: 0 hrs]
- Planning [In Possession Time: 3.36 hrs]
- Public Works [In Possession Time: 0 hrs]
- Utilities [In Possession Time: 0 hrs]
- Arborist [In Possession Time: 0 hrs]
- Plans Coordination
- Issuance
- Inspection
- CO

Ad Hoc Tasks

- Billing - greg

Task Details - Arborist

Status: Returned for Review

Status Date: 05/18/2015 Date Due: 05/22/2015

Department: Current Department Building Department Staff: Current User Bo Adams Assigned to: Bill Owens Assigned Date: 05/18/2015

Task Comments

Standard Comment

check spelling

Workflow Setup

Time Tracking Start Date: 05/18/2015 07:35 AM In Possession Time (hrs): 0 Estimated Hours: 0.0

Hours Spent: Overtime Due Date: 05/22/2015

Est. Completion Date: 05/22/2015 07:35 AM

Number: 14BRN-00000-00013

Menu Cancel Help

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- Planning [In Possession Time: 3.36 hrs]
- Public Works [In Possession Time: 0 hrs]
- Utilities [In Possession Time: 0 hrs]
- Arborist [In Possession Time: 0 hrs]
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Ad Hoc Tasks

- Billing - greg

Task Details Distribution

Assigned Date: 05/18/2015

Assigned to: Bo Adams

Current Status: Routed for Review

Action By: Bo Adams

Comments

End Time

Billable: No

Time Tracking Start Date: 05/18/2015 07:34 AM

In Possession Time (hrs): 0.02

Estimated Hours: 0.0

Comment Display in ACA: All ACA Users Record Creator Licensed Professional Contact Owner

Due Date: 05/20/2015

Assigned to Department: Building Department

Status Date: 05/18/2015

Overtime: No

Start Time

Hours Spent: 0.0

Action by Department: Building Department

Est. Completion Date: 05/20/2015 07:34 AM

Display E-mail Address in ACA

Display Comment in ACA

Reporting

Table Listing:

- BPERMIT_DETAIL
- GPROCESS
- GPROCESS_HISTORY
- STATUS_HISTORY
- R3STATYP
- R3APPTYP

Column	Data Type	PK / FK	NULL?	Definition
SD_TRACK_START_DATE	Date	N	Y	It is Task Time Tracking Start Date/Time
SD_ESTIMATED_DUE_DATE	Date	N	Y	It is task Estimated Due Date/Time
SD_IN_POSSESSION_TIME	NUMBER(15,2)	N	Y	It is task level In Possession Calc Time
TIMER_START_TIME	Date	N	Y	It is the time cursor for calculating the task level In Possession time.

Column	Data Type	PK / FK	NULL?	Definition
B1_TRACK_START_DATE	Date	N	Y	It is Application Time Tracking Start Date/Time
B1_ESTIMATED_DUE_DATE	Date	N	Y	It is Application Estimated Due Date
B1_IN_POSSESSION_TIME	NUMBER(15,2)	N	Y	It is application level In Possession Calc Time
B1_OVERALL_APPLICATION_TIME	NUMBER(15,2)	N	Y	It is Overall Application Time.

Resources

- Accela Automation Administration Guide 7.1 x
- Accela Community – Administration & Batch Processing
 - <https://accela.force.com/success/articles/Knowledge/236-how-to-setup-time-tracking-in-accela-automation?popup=true>
 - https://accela.force.com/success/articles/Configuration_Reference/0245-Long-Term-Time-Tracking-1419878497668?popup=true
 - <https://accela.force.com/success/apex/customercommunitycases?caseid=50060000008mG8g>



