BuildSA
General Functionality
User Guide

Development Services Department

Name___________________________________

Date ___________________________________

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Document Control

Date	Author	Version	Change Reference
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Guide Objective

This guide is designed to assist the end-user with the basic automation functions of BuildSA back-office needed for **conducting daily work tasks**.

Specific record-type information is **not** found in this guide. Other topics not included in the guide:

- Electronic Document Review (EDR/EPR)
- ePermitHub Digital Plan Room
- Geographic Information System (GIS)
- Inner City Reinvestment Infill Policy (ICRIP)
- Ad-hoc Reports
- Financial Aspect

Introducing BuildSA Back-office

BuildSA back-office is designed to be intuitive and easy to use. Once you get to know the tools available to you, you will quickly discover how useful they are in helping you perform your job.

- BuildSA back-office is a web-based application.
- BuildSA uses ‘footprints’ to identify the user working on any particular task.
- Login each day to view and access your daily tasks.
- Refresh your system often throughout the day.
- For help with BuildSA: dsdbuildsasupport@sanantonio.gov

Login and Logout

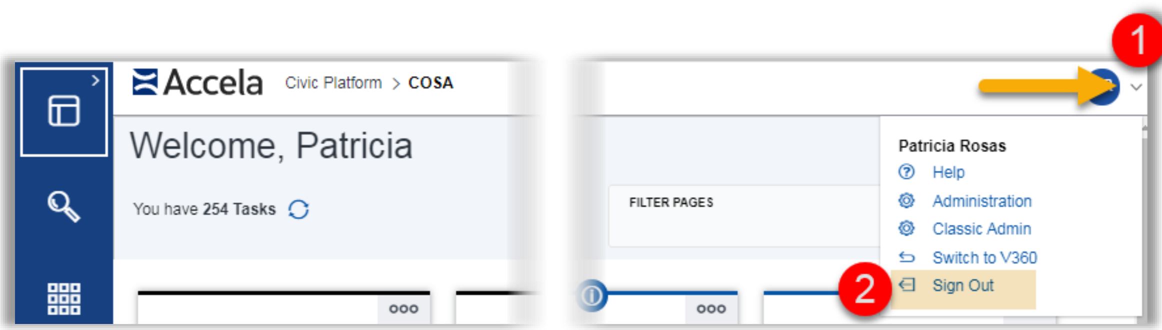
Login

1. **Click** the *Accela Civic Platform* icon located on your desktop (shown).
2. In the *Agency* field, **type** the word *cosa* (not case sensitive)
3. **Type** your *COSA User Name* and *Password* (case sensitive)
4. **Click** *Login.*

Logout

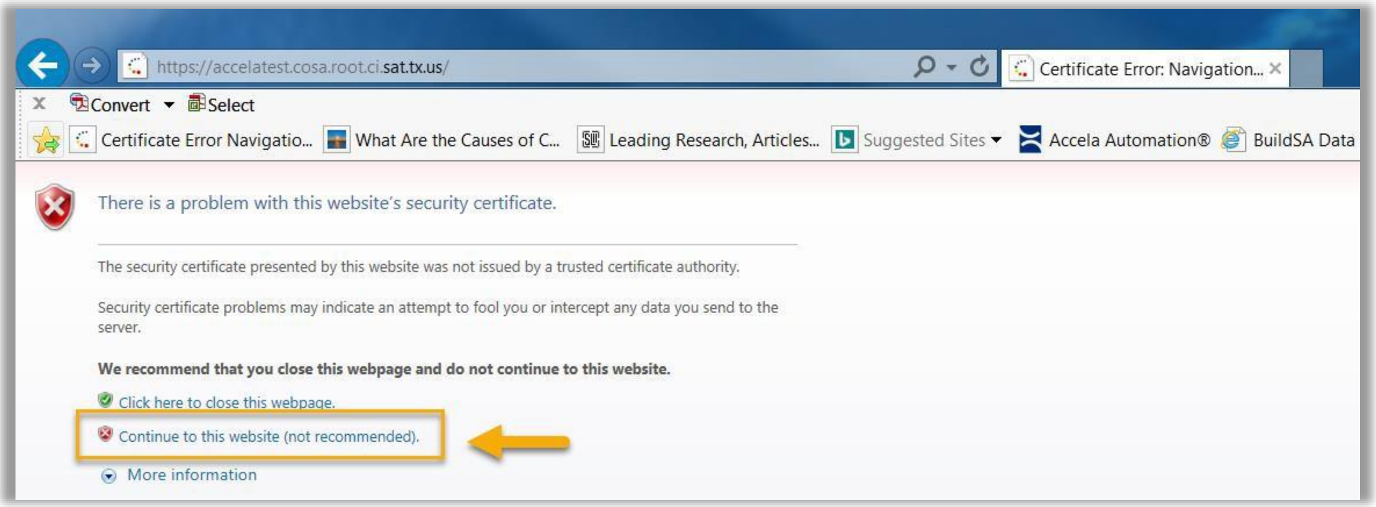
It is important to sign out properly when finished working in BuildSA. Signing out ensures that other users do not have access to your login credentials.

1. **Click** on drop-down menu arrow located at the upper right hand of the console (#1).



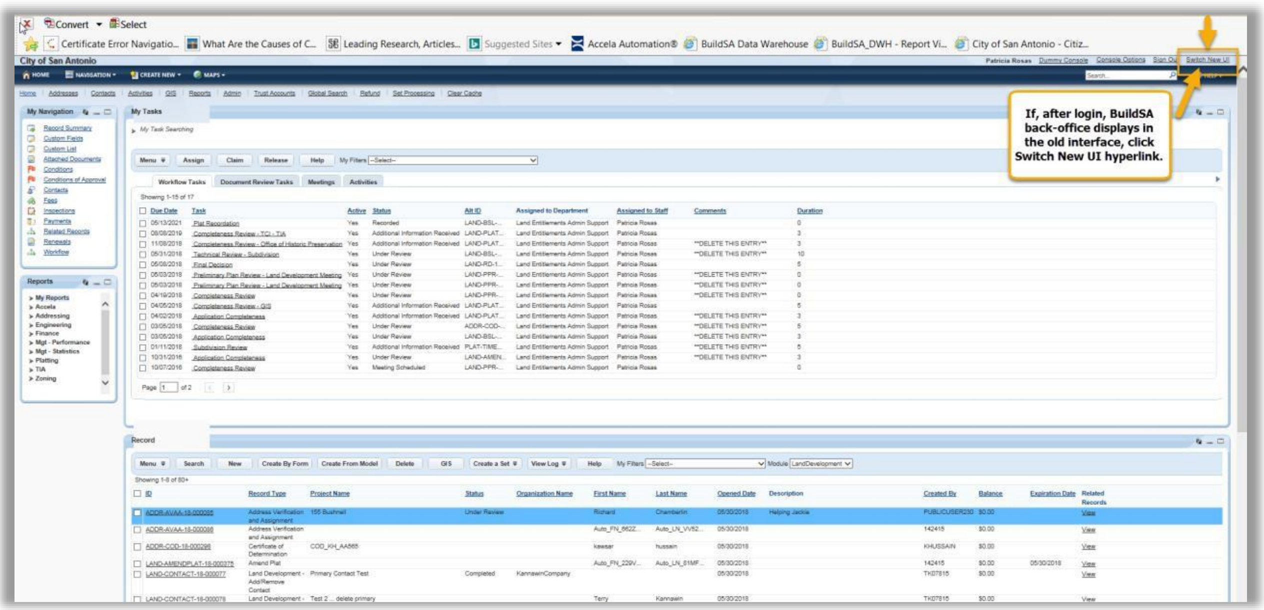
2. A drop-down menu displays. **Click** the *Sign Out* link (#2).

- ***NOTE: Use Google Chrome to access BuildSA.***
- ***NOTE: Enable pop-ups on your computer.***
- ***Clear your computer's cache weekly.***
- ***NOTE: Should Certificate Error Navigation screen displays, click Continue to this Website (shown).***



Old User Interface

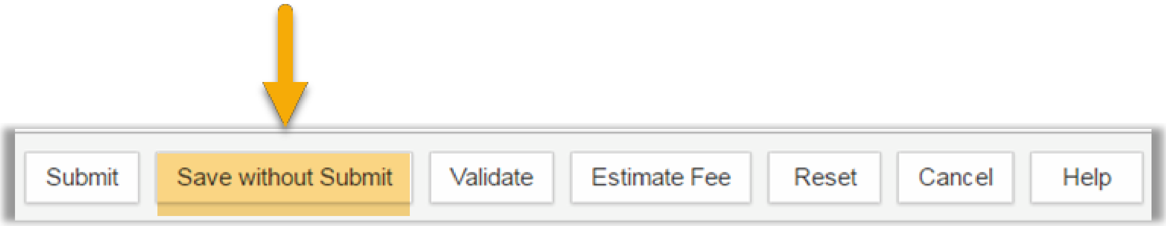
If, after login, BuildSA displays the old interface (shown), simply click on the Switch New UI hyperlink located in the upper right-hand corner of your screen to view the new version (shown).



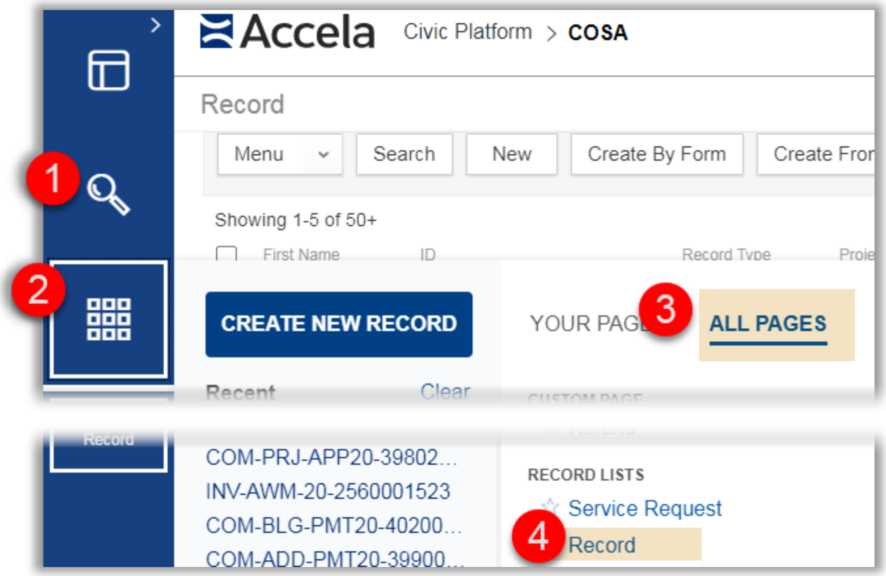
Timeout Mechanism

BuildSA has a built-in session timeout mechanism. Should your session remain inactive for a set period of time, BuildSA systematically ends the session.

While working in BuildSA and creating new application(s), use the *Save without Submit* option if you are unable to complete an application due to insufficient information or are stepping away from the system momentarily. The *Save without Submit* tab is found on the menu bar located at the top and bottom of the **APPLICATION INTAKE FORM.**



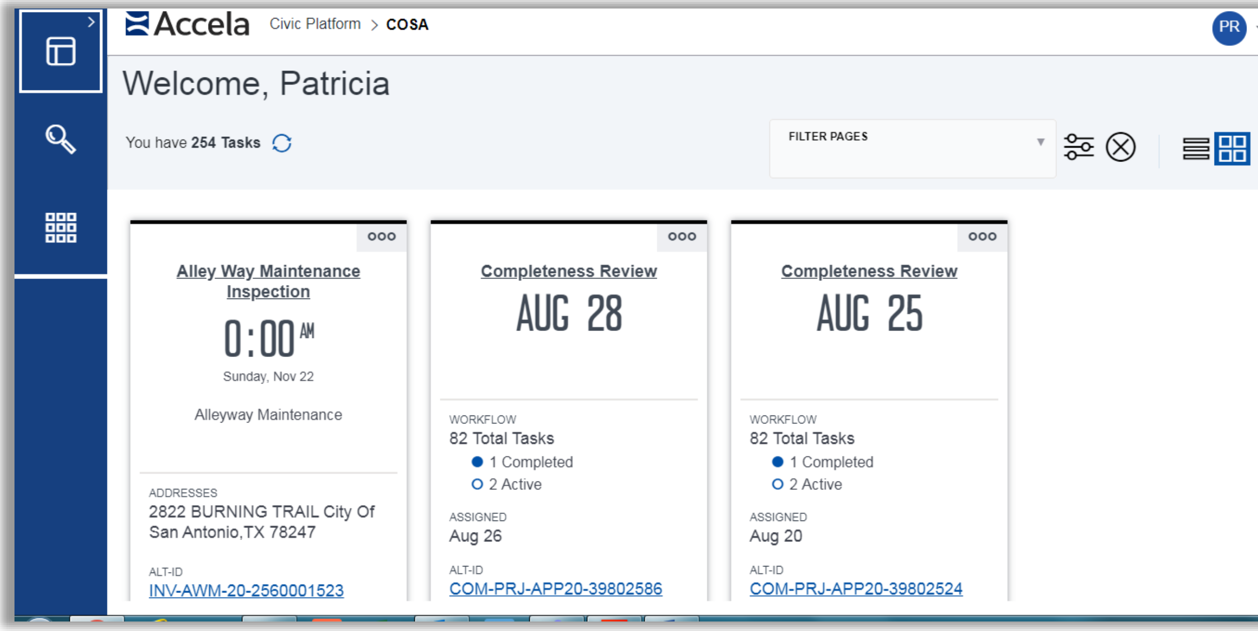
BuildSA generates a *temporary* record ID to the application (for example: 16TMP-001186). This temporary number allows the end-user to retrieve the application using Global Search (#1) or the *Record Search* page (steps #2, 3, 4). The Record Search page is located in All Pages (#3).



The Interface

The BuildSA Interface

The home page is the first page you see after logging into BuildSA. The Home Page displays ***your*** daily work assignments. **Login each day to view and access your work tasks.**

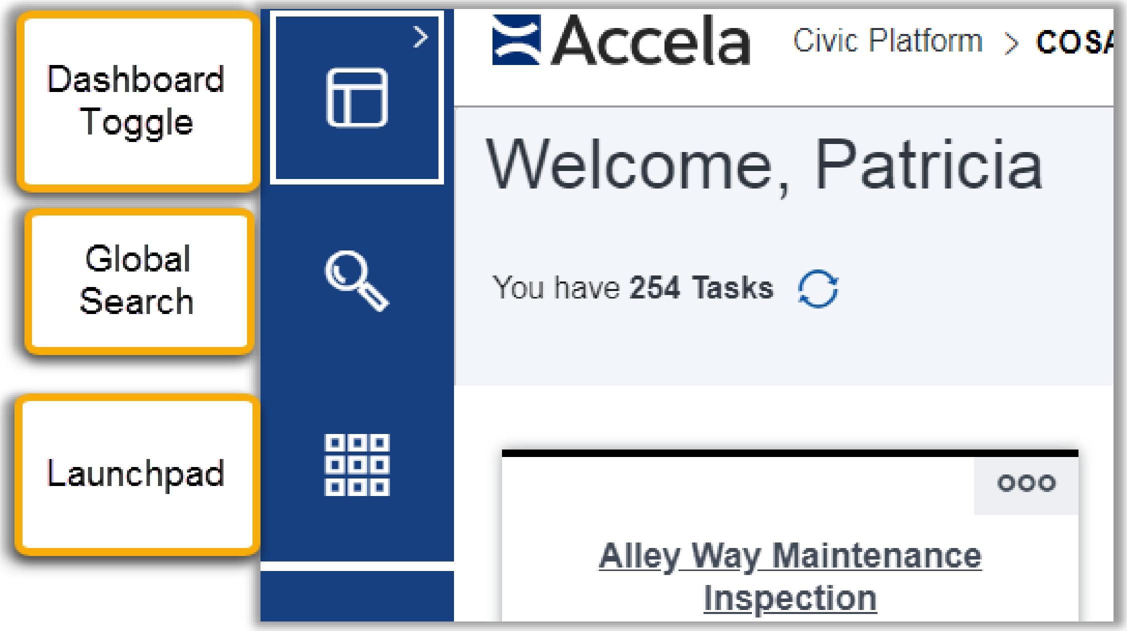


BuildSA provides a common interface, or back-office, for users. BuildSA offers customization options for viewing work tasks and on some of its individual Record pages. For this reason, you may notice that BuildSA displays differently for you than it does for others.

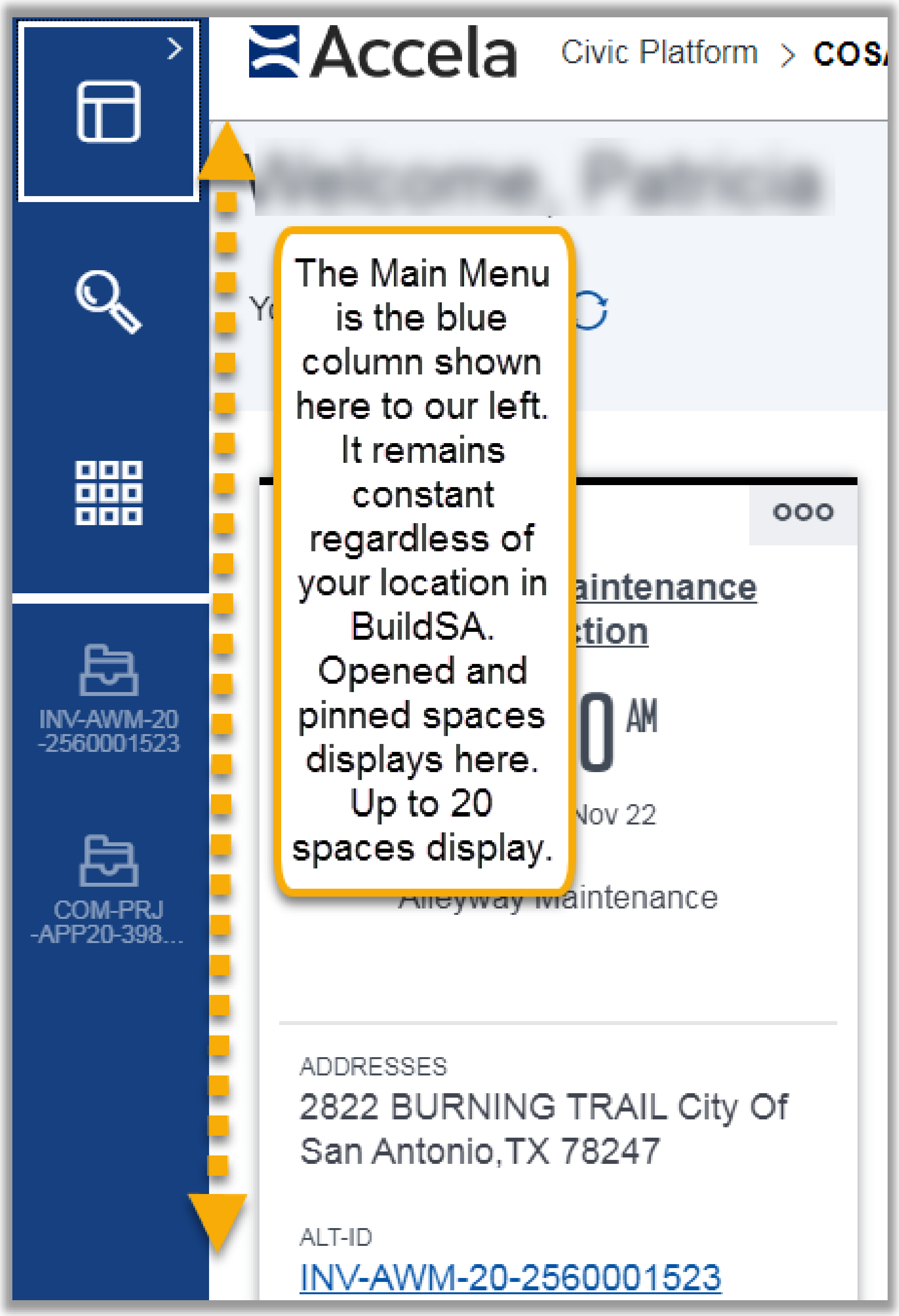
The BuildSA interface provides links to tasks and access to pages, as well as a link for signing out of BuildSA and accessing the *Help* button.

The Console

The console refers to the entire working area of your screen that displays BuildSA. The console includes an agency bar (COSA), toolbars, main links, pages, record tabs, and detail forms. The console lets you work within BuildSA by clicking the main links and working in the pages.

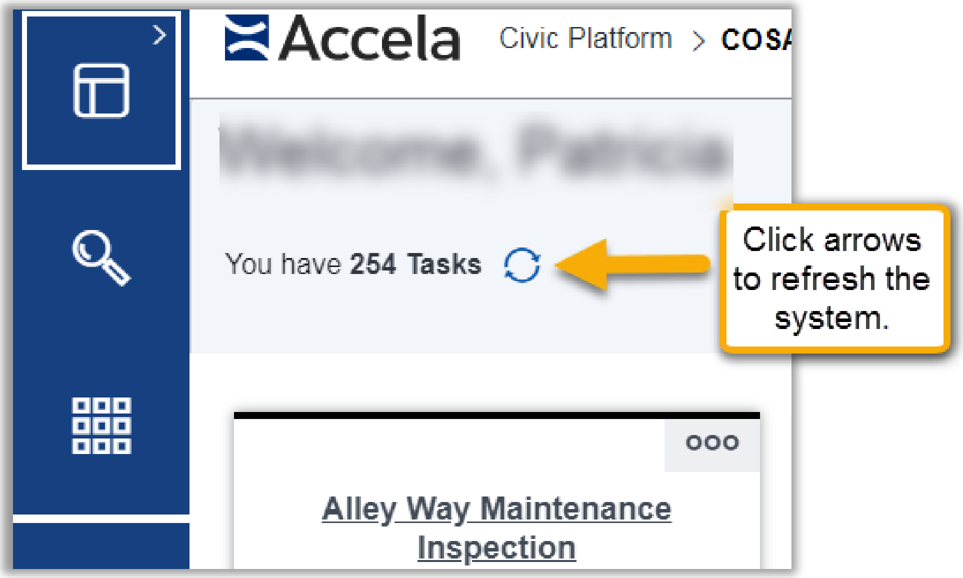


Clicking the Dashboard Toggle at any time, and from any other page in BuildSA, brings you back to the Home Page.



The Home Page

The Home Page is your daily starting point. Refresh often. Access frequently used pages and record forms from BuildSA by using the toolbars and main links. If a task is assigned to you, it displays on ***your*** Home Page. **Login daily and view tasks frequently throughout the work day.** BuildSA displays tasks in real- time.



Features of the Home Page

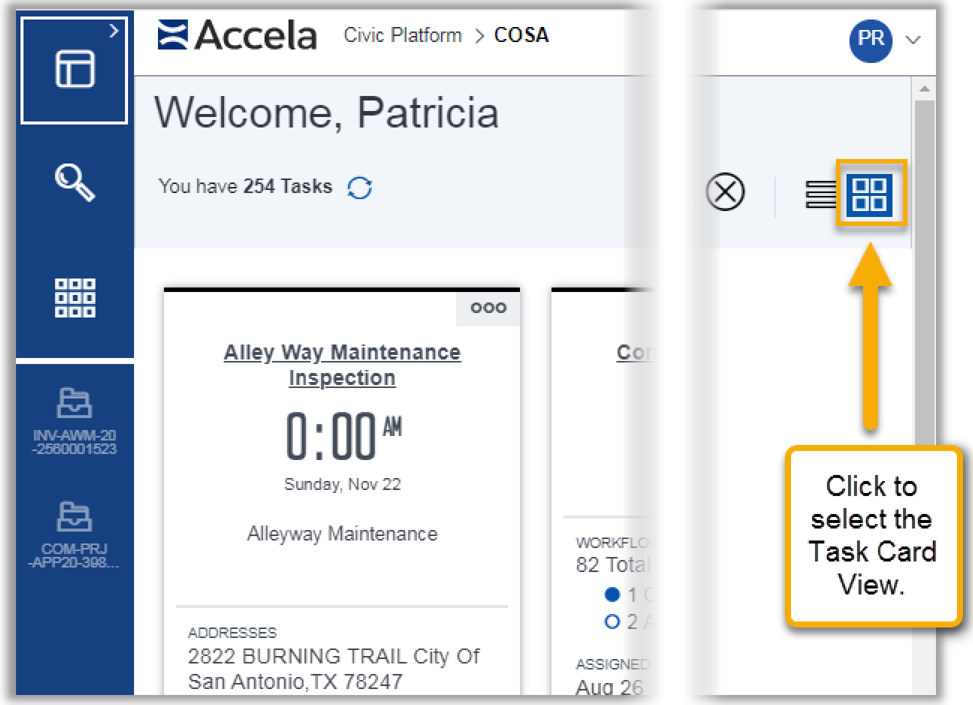
- The **tasks dashboard** is your day's to-do list. The workflow tasks listed on your desktop are ***your*** responsibility, if a task displays on your dashboard it is assigned to ***you.*** Please see your supervisor with questions.
- The **Launchpad** helps you get to where you need to be. It is the go-to location for your searches, reports, database information.
- The **main menu** helps you find what you need and when you need it.

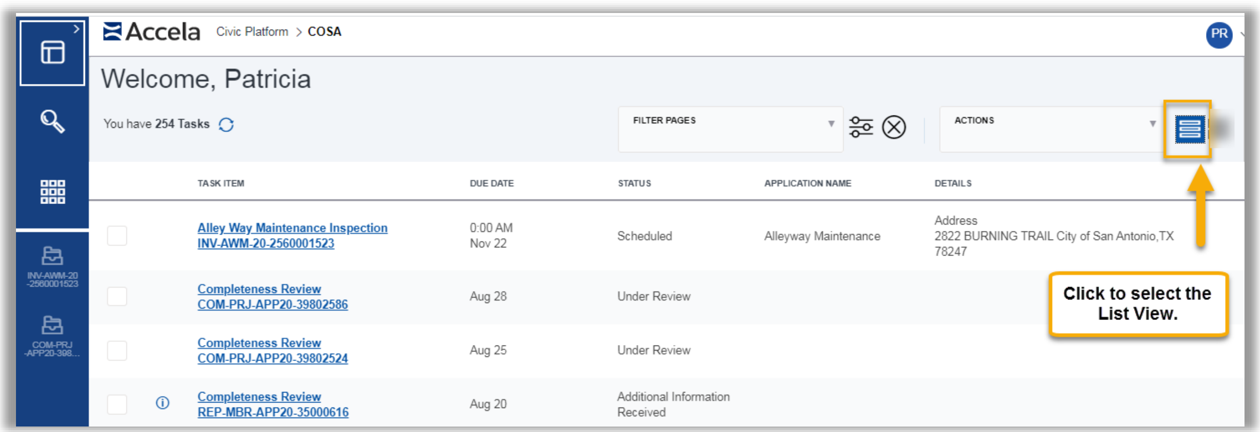
Dashboard Display

The tasks dashboard gives you two different display options for looking at your day's work assignments:

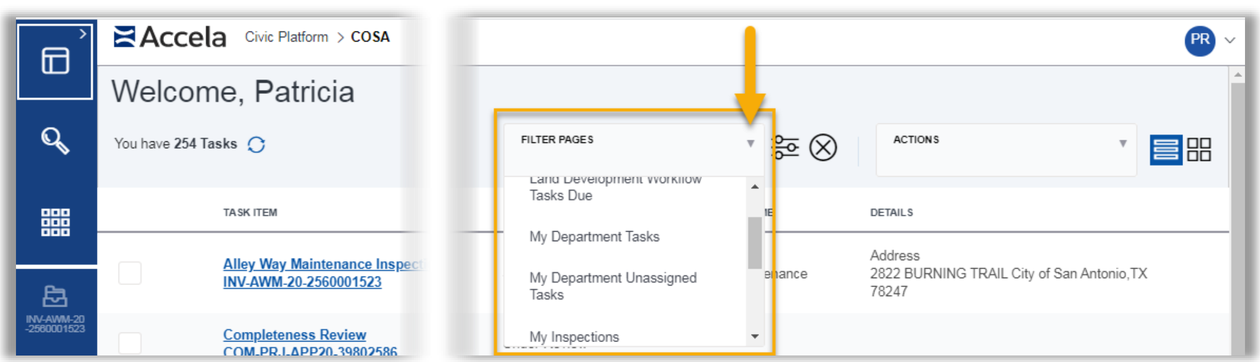
- Card View
- List View

Both views displays tasks **assigned to you**. Toggle between the two views using the *Work Task* view button (shown).

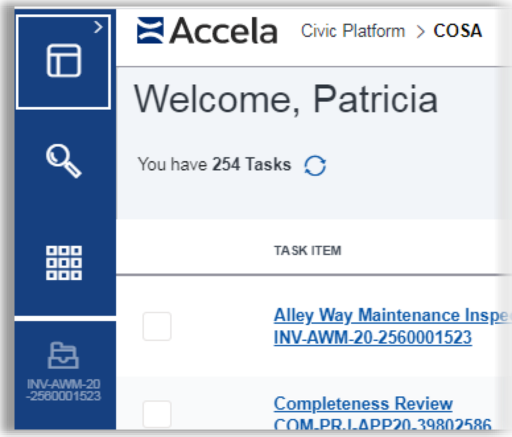


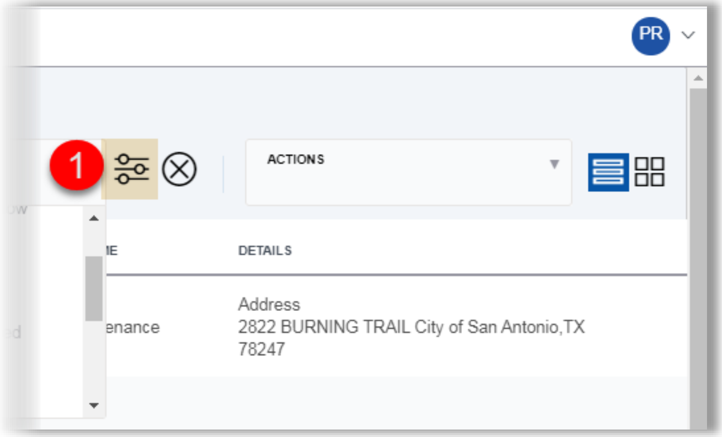


The *Filter Pages* drop-down menu gives you filtering options. Click the drop-down menu arrow to display options (shown).

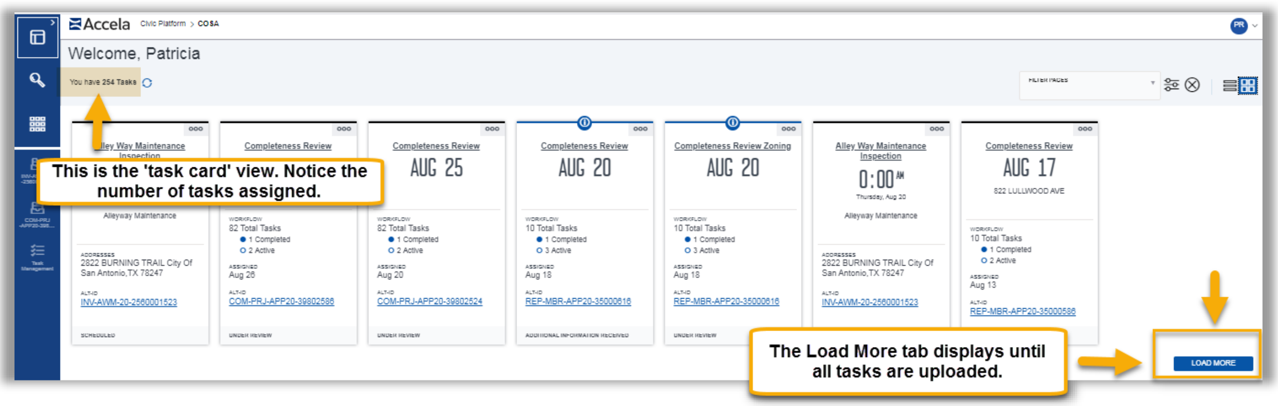


End-users may create their own personal filters to view tasks by clicking the My Filters link below (#1). Click here to view Creating Your Own Filters online tutorial. Click the X directly next to My Filters link to close My Filters page. See the Creating Filters user guide for additional information on creating filters or contact ***dsdbuildsasupport@sanantonio.gov.***





Task Card View



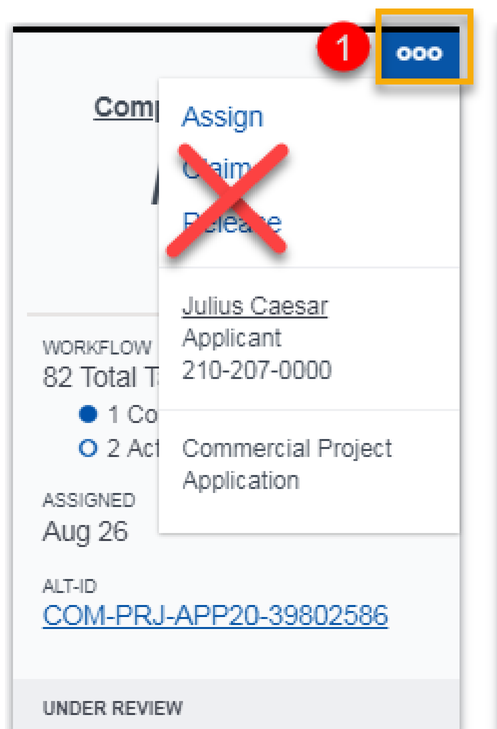
Important things to know when using the Task Card view:

- Six (6) cards display by default when the home page first loads. The **Load More** link located at the bottom of the page allows you to view more of your tasks. Tasks load in increments of six.
- The **Filter** control gives you input into which tasks display. Contact the BuildSA Support Team for help with adding filters to your drop-down filter menu.

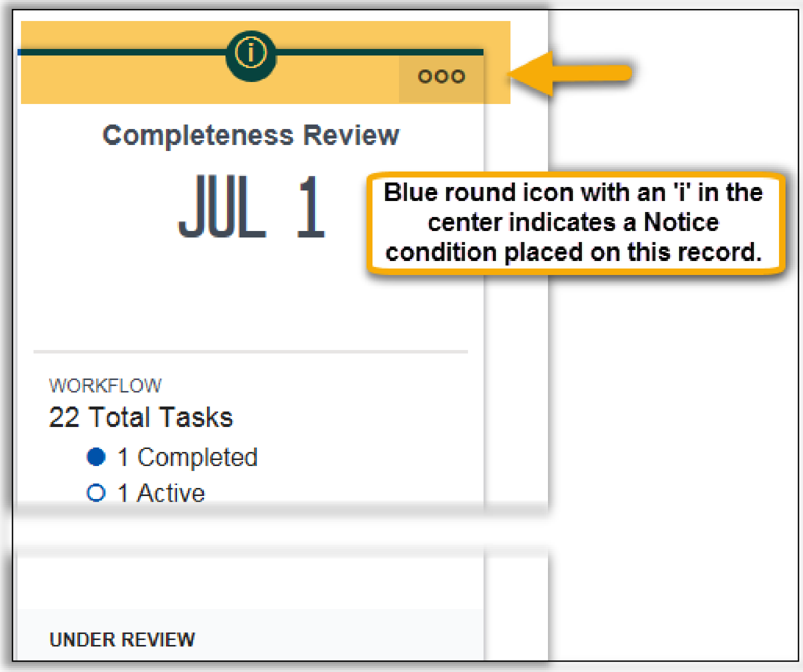
- You can use either List View or Task Card view to access your tasks.

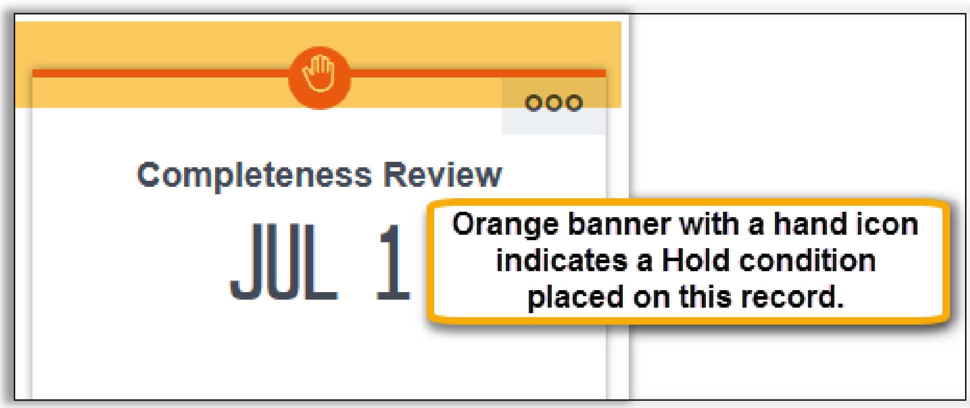
Features of the Task Card View

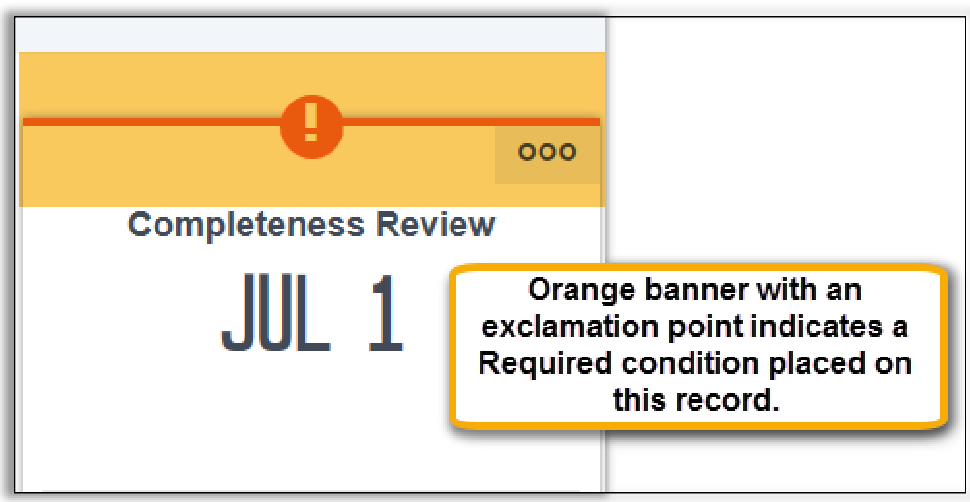
- Task card titles tell you at a glance what the task is.
- Titles in blue font indicate a hyperlink. Clicking on hyperlinks open the task details in a new space. If hovering over black text titles and a small hand indicator displays, the text is a hyperlink.
- Hovering on the options button (#1) displays a slide-out panel that provides you with a hyperlink to actions you can perform. Slide-out panels may also provide hyperlink access to record tasks or record contacts. **Claim and Release are out- of-the-box functionality and not for use at this time. Tasks may be assigned using the slide-out panel; however, best practice is to assign tasks using the Workflow Tab of the record.**

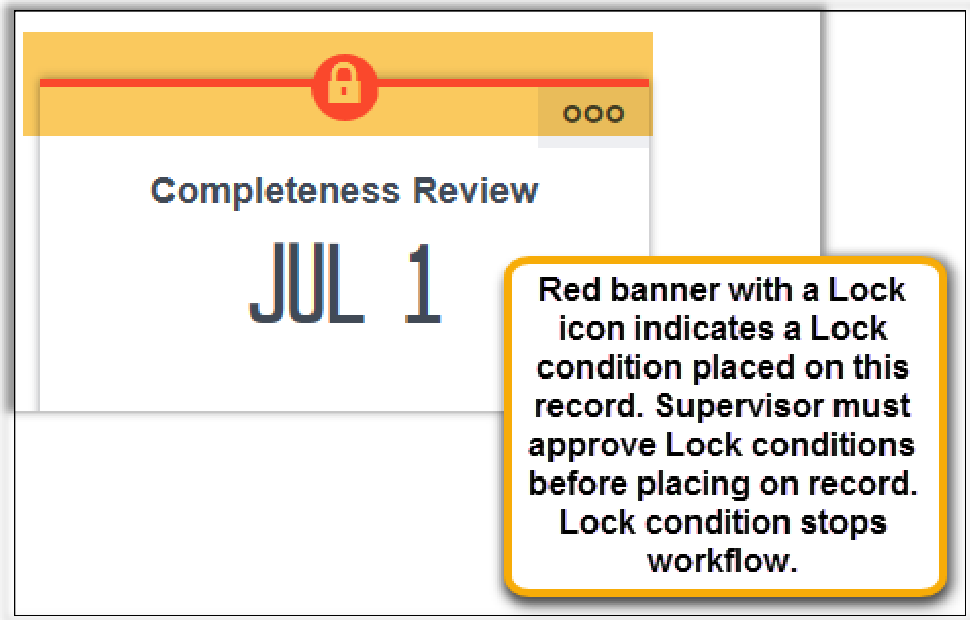


- Key information for tasks displays on the card, including important data such as due date, schedule time, conditions, and more.
- Icons indicating holds, conditions, notes, and locks, display prominently on task cards as different colored icons (shown).


Completeness Review
JUL 1
Blue round icon with an 'i' in the center indicates a Notice condition placed on this record.
WORKFLOW
22 Total Tasks
1 Completed
1 Active
UNDER REVIEW


Completeness Review
JUL 1
Orange banner with a hand icon indicates a Hold condition placed on this record.

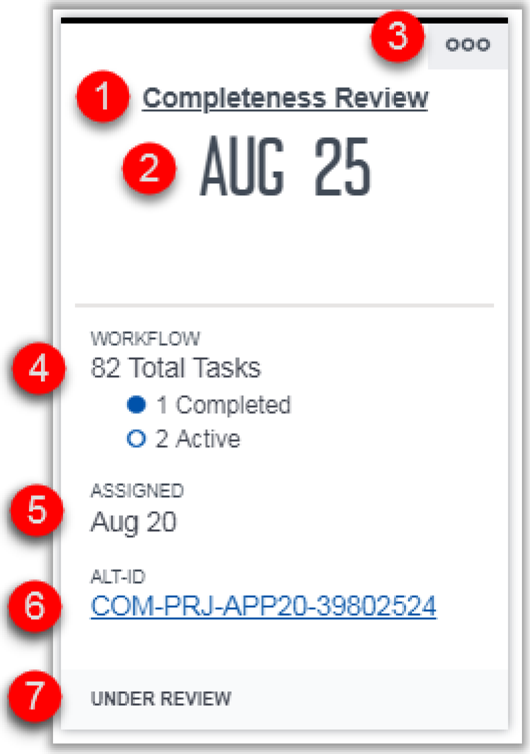

Completeness Review
JUL 1
Orange banner with an exclamation point indicates a Required condition placed on this record.



Task cards provide a nice visual for browsing, but more importantly, they also provide a significant amount of relevant information and functionality that can help you plan your course of action to address your task.

Task Card Example

Task cards provide you with a number of useful details at a glance. They also provide you with one-click access to the record of origin. See the example below to learn more about what data displays on the task card.



1	Workflow Task Title
2	Task Due Date
3	Options button: when clicked displays side panel. To close side panel, click the Options button once more.
4	Total tasks in the record
5	Date task assigned
6	Record ID # and link to access the record
7	Workflow status

Task Card Details

- **Other Details**. Task-centric details tell the user something about how to interact with that task. Should a Meeting Task Cards display, do not Accept or Reject using BuildSA. **Outlook and BuildSA are not linked at this time.**

List View

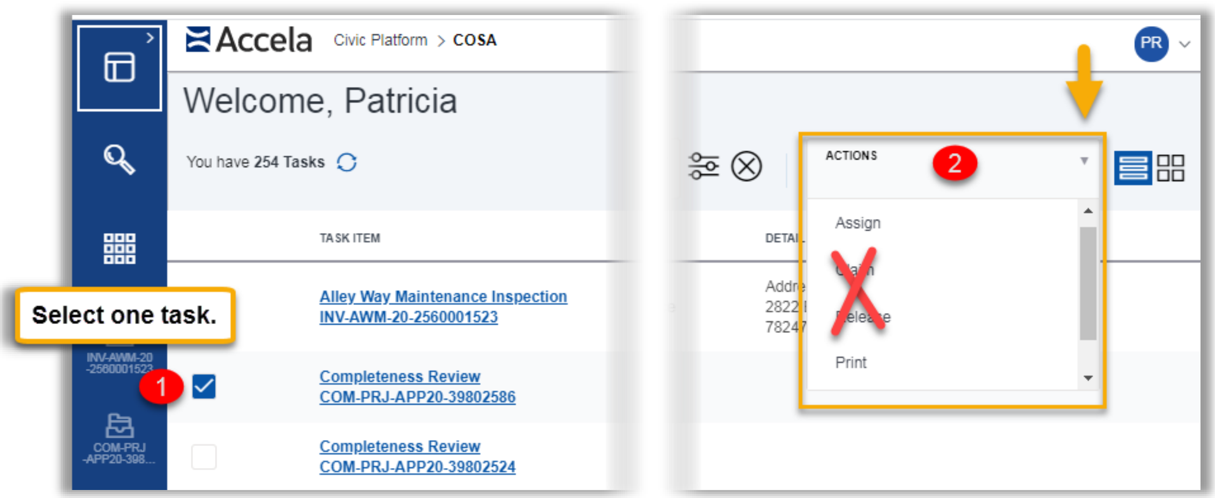
- Task items are listed in a table format. Six (6) tasks display by default when the page first loads. Use the **Load More** link, located at the bottom of the page, to view more of your tasks. Tasks load in increments of six (6).
- **Select** one or more task items and perform actions on them.
- The **Actions** button gives you access to commands you can apply to one or more task items.
- The **Filter** button gives you control over which tasks display.
- You can toggle to a task card view using the dashboard display options.

- The List view provides an actions button that allows the user to export that list to CSV. A CSV (Comma Separated Values) file allows data to be saved in a table structured format (Excel).

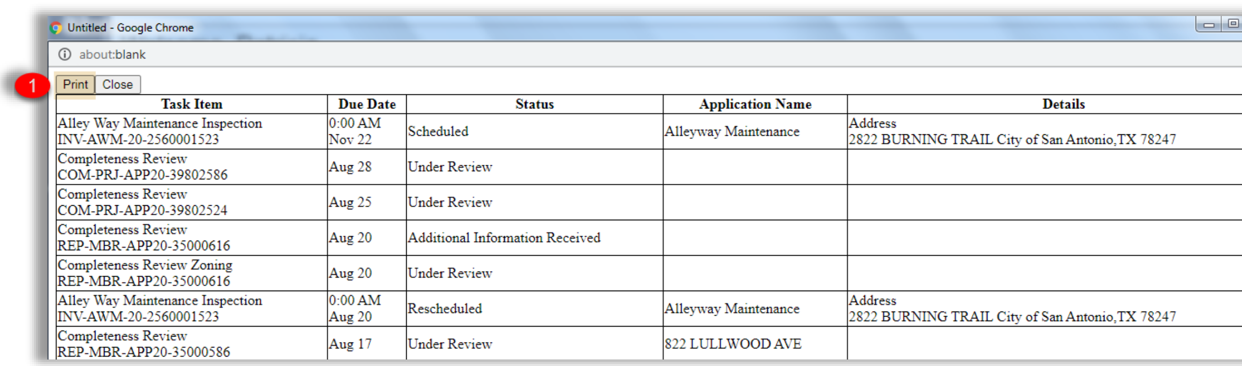
Using the List View

The list view gives you the ability to view many tasks at once in a table format. This is useful to quickly compare due dates of assignments in your queue, as shown in the image below. A **CSV** is a comma separated values file, which allows data to be saved in a table structured format (Excel).

Follow steps 1 and 2 to generate an excel spreadsheet of your task. Note that the spreadsheet contains information at the time it was created. BuildSA back-office is web-based and generates tasks in real-time.   A task may be assigned using the List View (#2) but the preferred method is using the Workflow Task bar in the record. Tasks may only be assigned using the List View, one at a time. The Assign option does not display if more than one task is selected.



After clicking *Export to CSV*, the information displays as shown. Click Print (#1) to print.

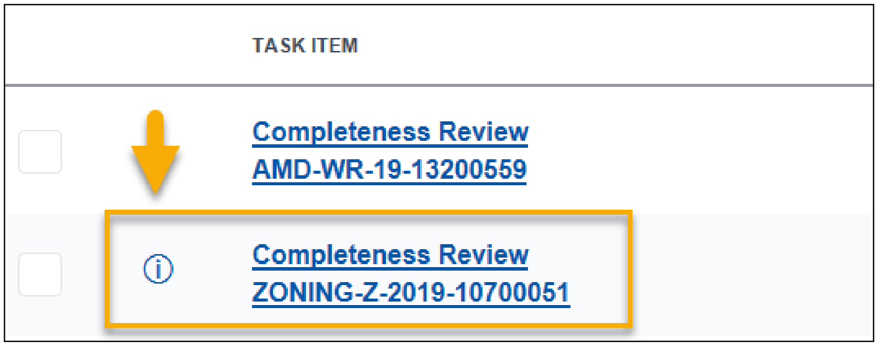


Untitled - Google Chrome
about:blank
Print Close

Task Item	Due Date	Status	Application Name	Details
Alley Way Maintenance Inspection INV-AWM-20-2560001523	0:00 AM Nov 22	Scheduled	Alleyway Maintenance	Address 2822 BURNING TRAIL City of San Antonio,TX 78247
Completeness Review COM-PRJ-APP20-39802586	Aug 28	Under Review		
Completeness Review COM-PRJ-APP20-39802524	Aug 25	Under Review		
Completeness Review REP-MBR-APP20-35000616	Aug 20	Additional Information Received		
Completeness Review Zoning REP-MBR-APP20-35000616	Aug 20	Under Review		
Alley Way Maintenance Inspection INV-AWM-20-2560001523	0:00 AM Aug 20	Rescheduled	Alleyway Maintenance	Address 2822 BURNING TRAIL City of San Antonio,TX 78247
Completeness Review REP-MBR-APP20-35000586	Aug 17	Under Review	822 LULLWOOD AVE	

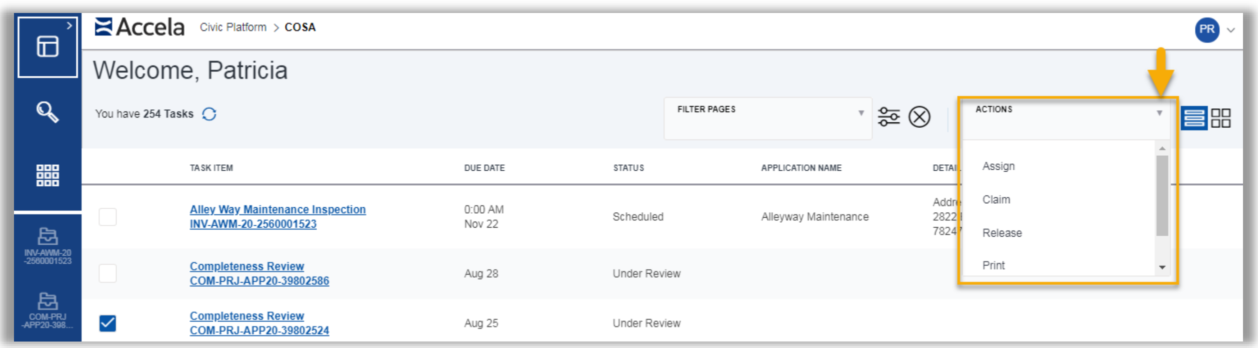
Actions Menu in List View

If you have tasks with conditions, the condition icons display to the left of the Task (shown).

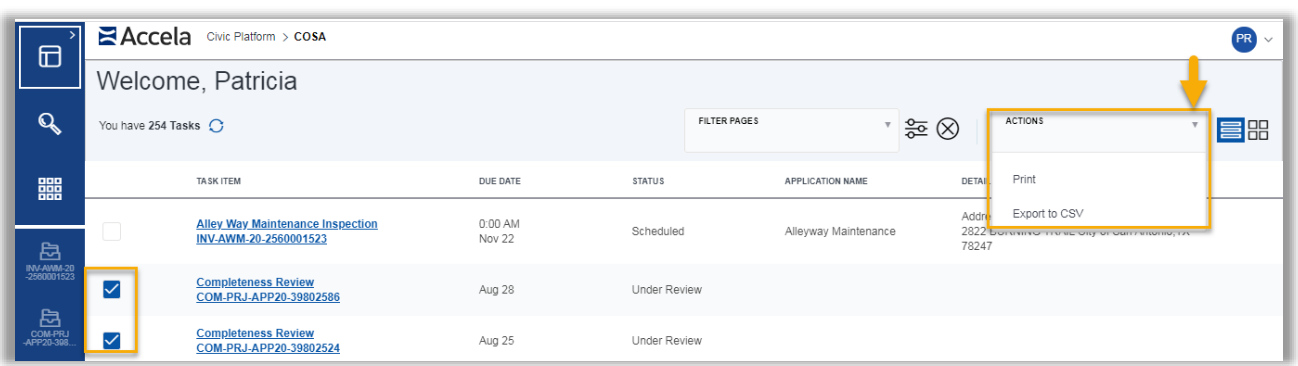


By default only six (6) tasks display when you first open the task list view. Use the **Load More...** link at the bottom of the page to increase the task list. Tasks load in increments of six (6). You can perform actions on one task or select multiple tasks and perform a batch action on them.

For example, select a single Task Item by clicking the arrow to the left of the Task Item (shown). Click the Actions drop-down menu arrow to view options available for action.



If you select more than one task and then click **Actions**, the available actions include only those that you can apply to ALL selected tasks. Note: the Assign option does not display.



Condition Icons

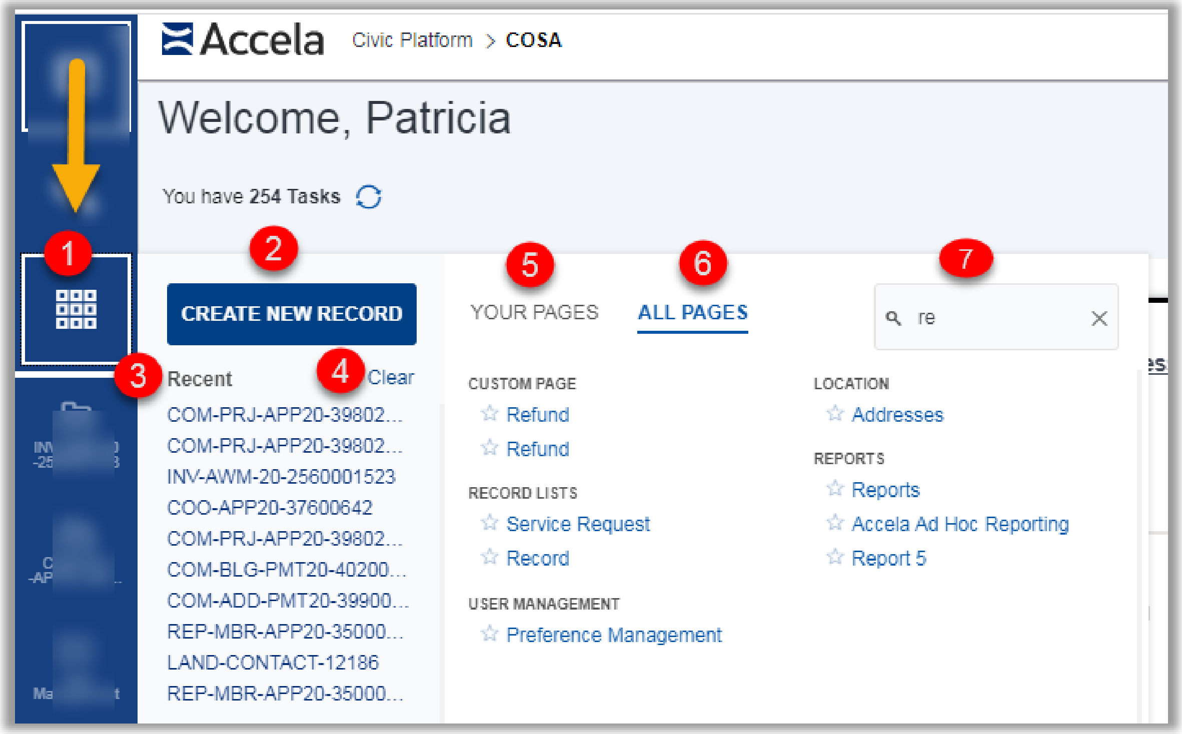
Conditions are notices that can be added to records, addresses, inspections and contacts. There are four levels of severity associated with conditions: Lock, Hold, Notice, and Required. Although conditions do not necessarily impose holds, they can prolong the workflow process until they are met. The exception is a Lock condition. The Lock condition on a record makes the record read-only. **Supervisor approval is required before applying a Lock condition to a record.**

Condition Icon	Condition Status	Notes
	**Notice**	Information only.
	**Hold**	May slow some workflow processes until the condition is met.
	**Requirement**	Requirement must be met before proceeding.
	**Lock**	**Supervisor approval required to apply a Lock condition.**

When you see one of these icons, open the record and click the Conditions Tab to view information.

Launchpad

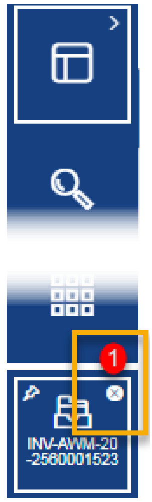
The Launchpad is an access point to reports, creating new records and several pages containing reference data. Any link clicked within the *Launchpad* opens a new space to view, access or work with data the data that displays. Each space opened displays on the Main Menu bar. If you use the page often, you may want to pin the page to hold it on the Main Menu bar or save it as a Favorite in *Your Pages*.

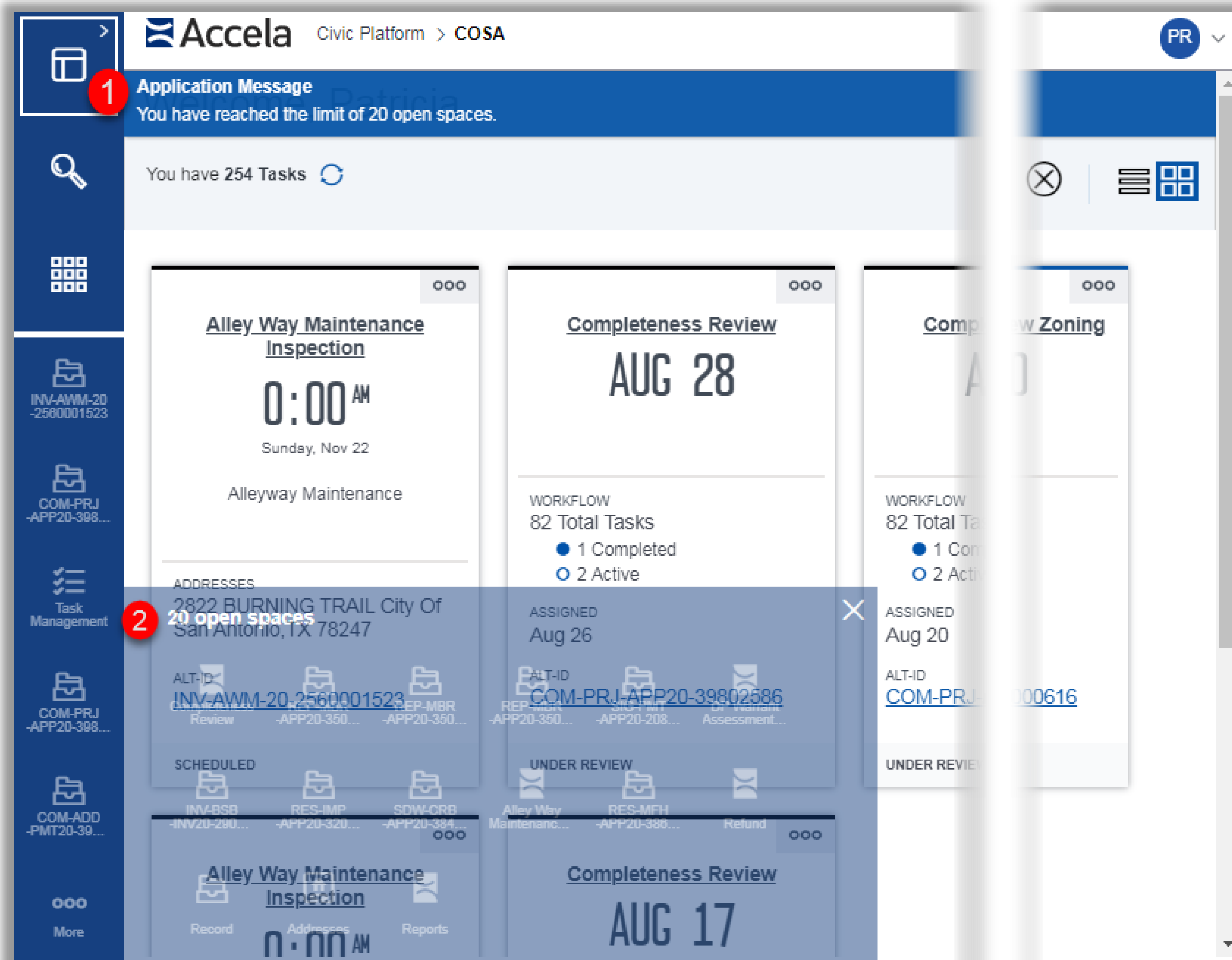


1. The Launchpad toggle (#1).
    1. Clicking **CREATE NEW RECORD** opens the Select a record type form. Use this tab to create a **new** application (#2).
    2. Recently viewed records list (#3).
    3. Clicking on the Clear All hyperlink clears all recently viewed records. The list re-populates as you open records, contacts, etc. Once the list is clear; however, it cannot be retrieved (#4).
    4. Your Pages displays favorites and holds up to 20 spaces (#5).
    5. All Pages displays all the pages available (#6).
    6. The filter used to search within All Pages (#7).

Launchpad Features

After 20 spaces are opened, BuildSA generates the message **You have reached the limit of 20 open spaces** (shown). Manually close open spaces by clicking the ‘x’ at the upper right-hand corner of an open space (shown).


1
INV-AWM-20
-2560001523


Accela
Civic Platform > COSA
PR
1
Application Message
You have reached the limit of 20 open spaces.
You have 254 Tasks
Alley Way Maintenance Inspection
0:00 AM
Sunday, Nov 22
Alleyway Maintenance
Completeness Review
AUG 28
WORKFLOW
82 Total Tasks
1 Completed
2 Active
ASSIGNED
Aug 26
ALT-ID
COM-PRJ-APP20-39802586
UNDER REVIEW
2
20 open spaces
ADDRESSES
2822 BURNING TRAIL City Of San Antonio, TX 78247
ALT-ID
INV-AWM-20-2560001523
SCHEDULED
ASSIGNED
Aug 20
INV-AWM-20
-2560001523
COM-PRJ
-APP20-398...
Task Management
COM-ADD
-PMT20-39...
More
Record
Addresses
Reports
Refund
Completeness Review
AUG 17

To close the *Application Message*, click the arrow at the far right of the blue bar (shown).

Features of the Main Menu

- Pin spaces for easy access. Each time you log in, your pinned spaces display on the *Main Menu* bar until they are unpinned.

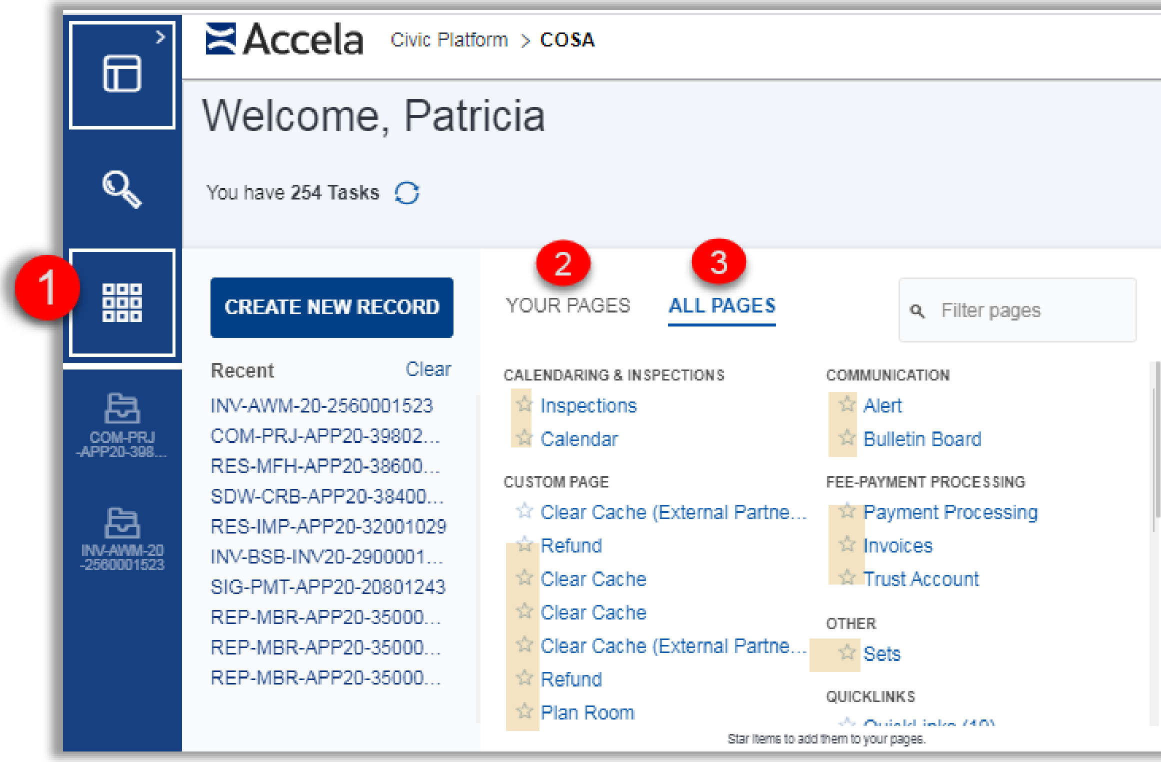
Pinning Spaces

1. **Click** the *Pin* on the opened or recently viewed space (shown).

2. The space remains *Pinned* until you choose to unpin it by clicking on the *Pin* once more. Notice that pinned spaces do not display the x for closing the record.

Your Pages Area

The *Your Pages* area provides an area for storing shortcuts to your favorite pages. To get to *Your Pages*, click the Launchpad (#1). Click the Star (highlighted) alongside any pages in *All Pages* if you want to create a shortcut (the stars alongside each page are highlighted below).



All Pages is a list of all the information available to you sorted by functionality. The list cannot be reorganized but you can filter the list to help you find data you need. Note the magnifying glass to the left of the field ‘Filter pages’. Use this field to search for data.

Creating Favorites

If you have certain pages you use frequently, save them as favorites for quick access. In the *All Pages* menu look for the stars placed by each page (shown).

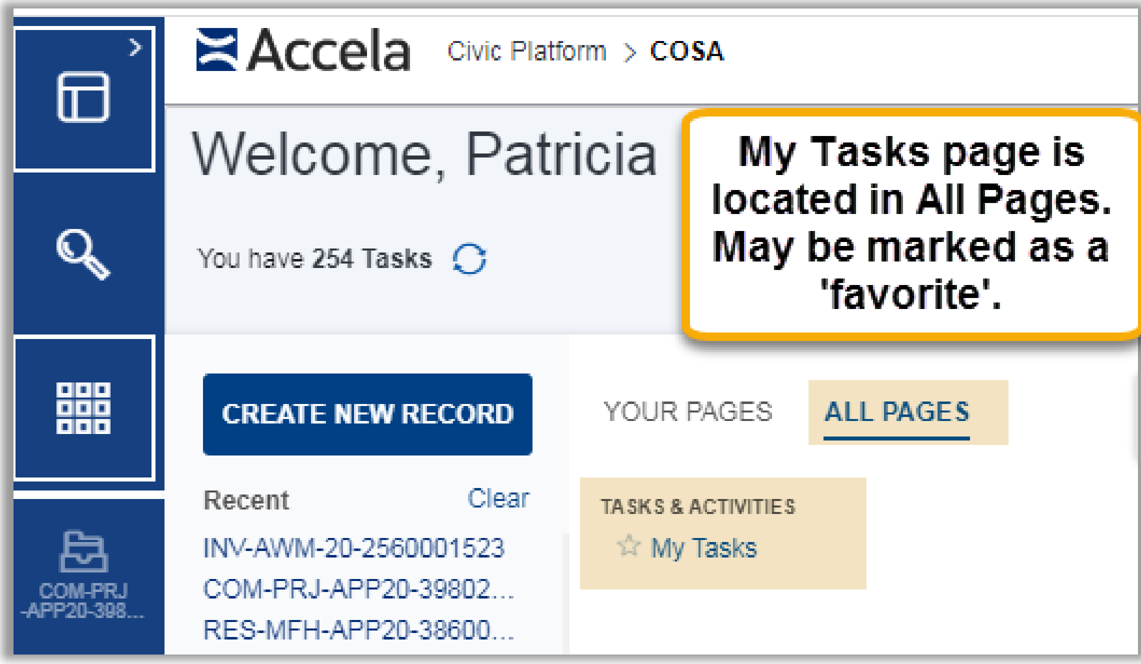
1. A blue star means a page is currently marked as a favorite (#1) and will display under *Your Pages* section for easy access.
   - A white star in All Pages means a page is not marked as a favorite (#2).
     1. **Locate** the page you want to mark or unmark as a favorite.
     2. **Click** the star.
        - The star color changes color (white to blue to mark as a favorite, or blue to white to unmark as a favorite).

My Tasks Page

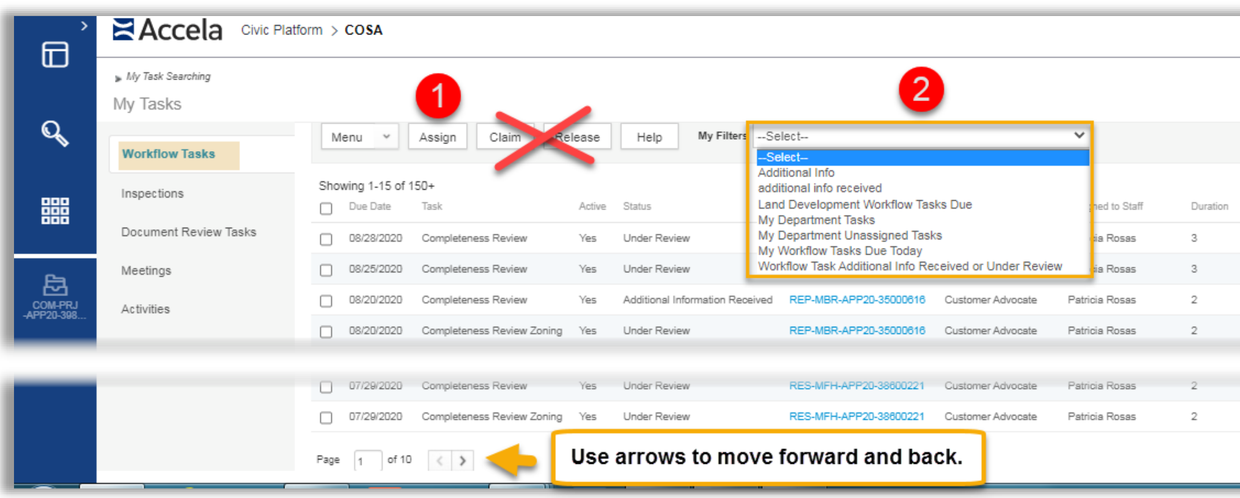
My Tasks is a specific page. It is another option you have of viewing your tasks, meetings, document reviews, activities, inspections and assigning tasks. Some users prefer the **My Tasks** space as an alternative for the card/list view because of the number of tasks that are visible on the screen and how they are allocated onto specific tabs. **We are not using Claim or Release at this time.**

To access My Tasks page:

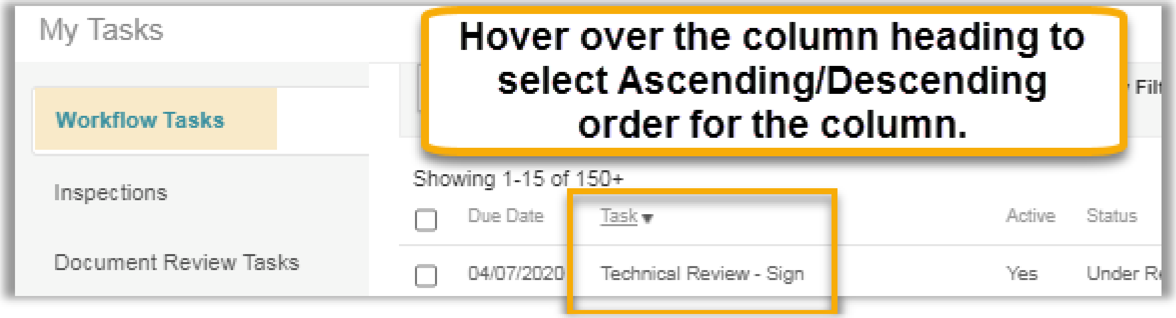
1. **Click** the *Launchpad***.**
2. **Navigate** to *All Pages*.
3. **Filter** for *My Tasks.*
4. **Click** the *My Tasks* hyperlink.
5. *My Tasks* page displays (shown next page).

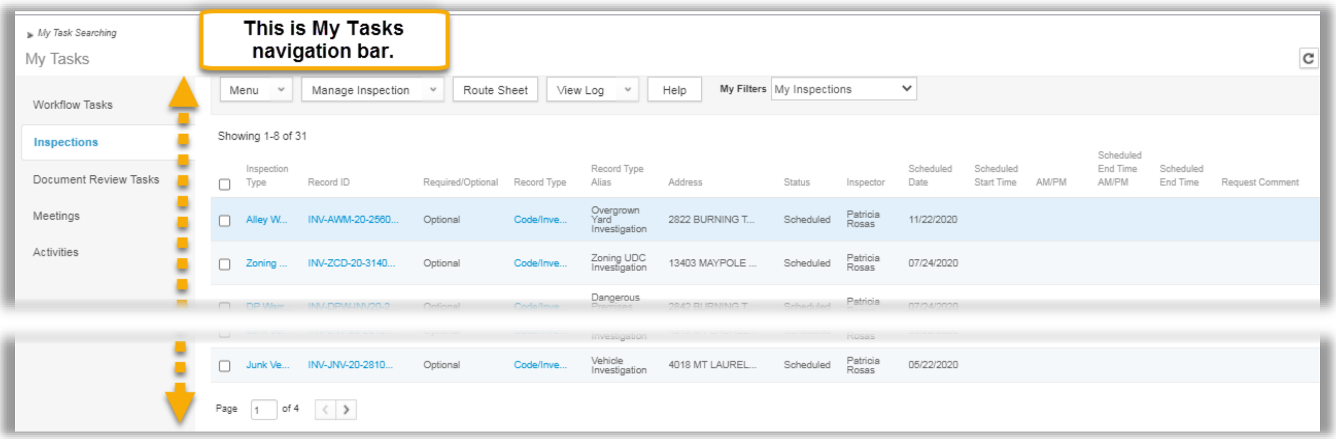


The preferred method of assigning tasks is using the specific record's workflow tab. Notice the *My Filters* drop-down menu options for filtering tasks (#2). Click the record ID number (Alt ID) column hyperlink (blue text) to access the record.



Hovering over the column headings sorts information in the column in Ascending/Descending order.



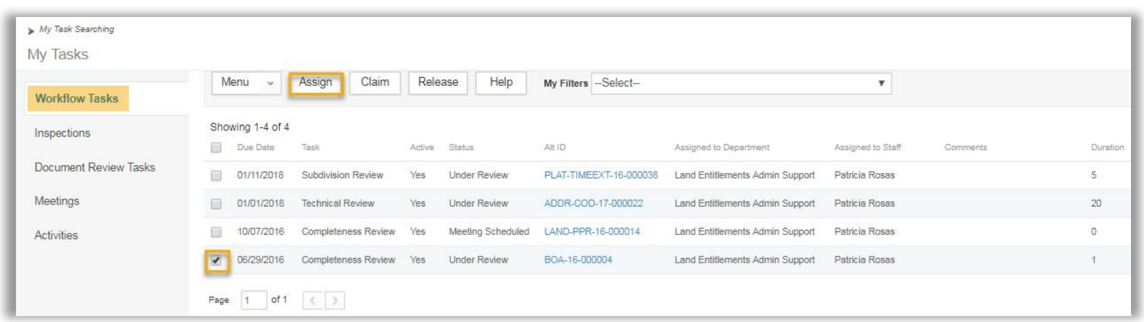


Assigning a task from this page

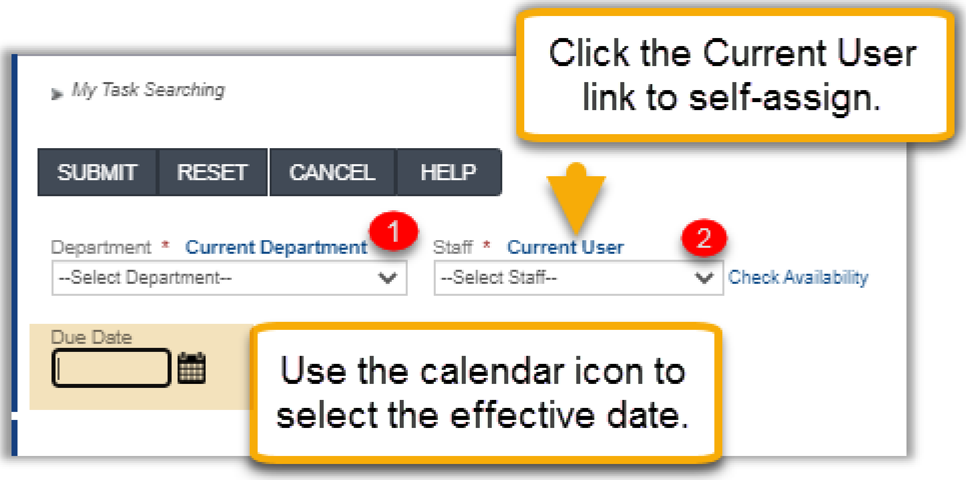
Preferred method of assigning tasks is from the record-specific Workflow Tab.

To assign a task follow these steps

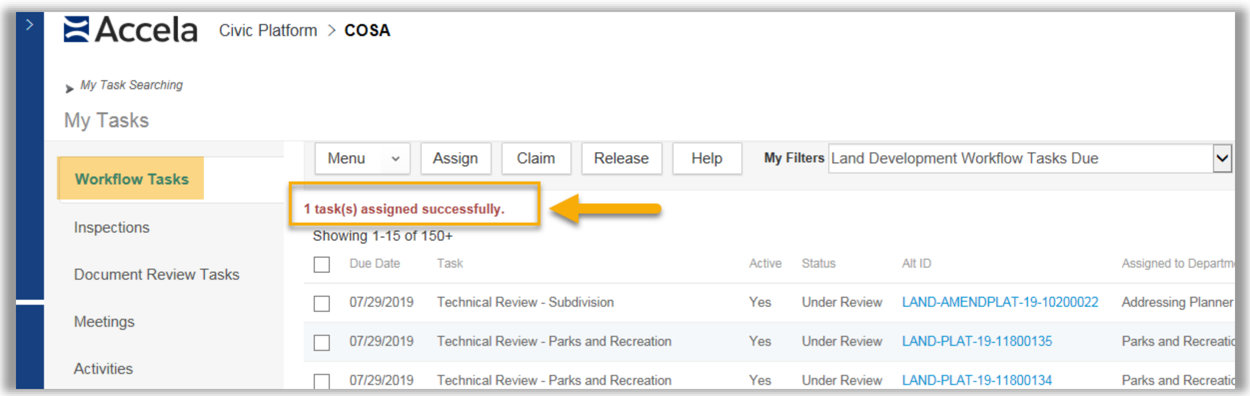
1. **Click** the box to the left of the Task you want to assign (shown).
2. **Click** the Assign button (shown).



3. The Assignment page displays (shown). **Click** the Department drop-down menu arrow to select a different agency/division/department (#1).
4. **Click** the Staff drop-down menu arrow to select a different user (#2). **Note: Check Availability link (shown in blue text) is an out-of-the-box feature and not in use at this time.**



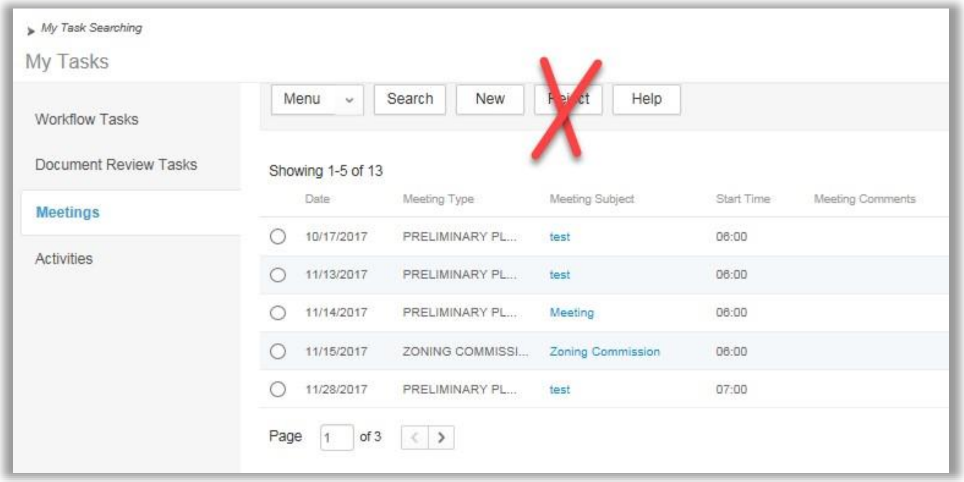
5. **Click** Submit (shown).
6. BuildSA generates a *1 task(s) assigned successfully message* (shown). Note that the task does not display on your task list any longer. The task now displays on the home page of the user to whom it is now assigned.



❖ ***NOTE: Double-clicking on the Current User link self-assigns a task.***

My Tasks Meetings

1. The meetings tab on My Tasks page is used for **viewing meeting details only** (shown). *Reject* is an out-of-the-box functionality that is not in use at this time. Outlook and BuildSA are not linked at this time. Ensure you are using the individual Record's meeting tab to manage the meetings currently available in BuildSA.

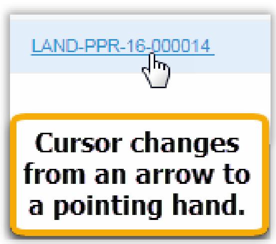


General Tips

Identifying Hyperlinks

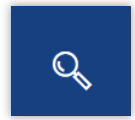
Not all hyperlinks are readily apparent. When in doubt, use one of these techniques to identify hyperlinks.

- **Method 1**: Is the text blue? In general, BuildSA hyperlinks display as blue text.
- **Method 2**: When you hover your mouse over an active hyperlink without clicking, an underline appears. This only works if it's text, however.
- **Method 3**: When you move your mouse over an object without clicking, the cursor changes from an arrow to a pointing hand if it is an active hyperlink. Click while the hand displays to activate the hyperlink.



Reference Table

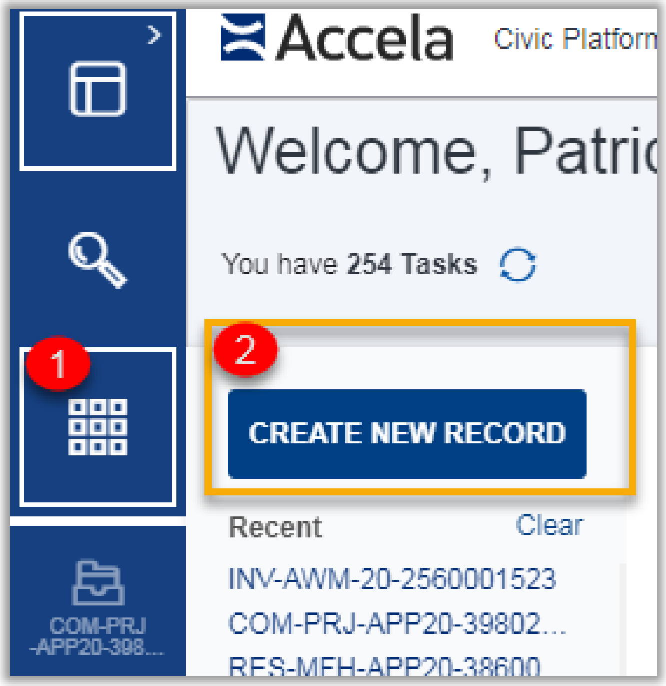
We understand that change can be frustrating, so to alleviate some of your frustration, we are providing you with a reference table that lists a number of common activities you might perform in a typical work day. For each activity listed, we provide you with helpful tips on how to proceed with those activities in BuildSA back-office.

How do I….?	In BuildSA…
Find a record using Global Search	**The** magnifying glass on the Main Menu bar is your first go-to search tool for addresses, parcels, records, contacts, emails, LPs, etc. 
Find a TEMP Record	Search for records saved using *Saved Without Submit (TEMP records)* by using the following path: *Launchpad/All Pages/Record/Search.*
Create a new record	Click Launchpad. Click **CREATE NEW RECORD.**
View my tasks	Log in to BuildSA. Your daily tasks display on the Home Page. Select a view preference: Task Card View or List View. You may also use My Tasks page located under All Pages.
Use pre-existing reports	Open Launchpad. Click All Pages, search for Reports. Select a category to display reports available. Click the report's hyperlink to open.

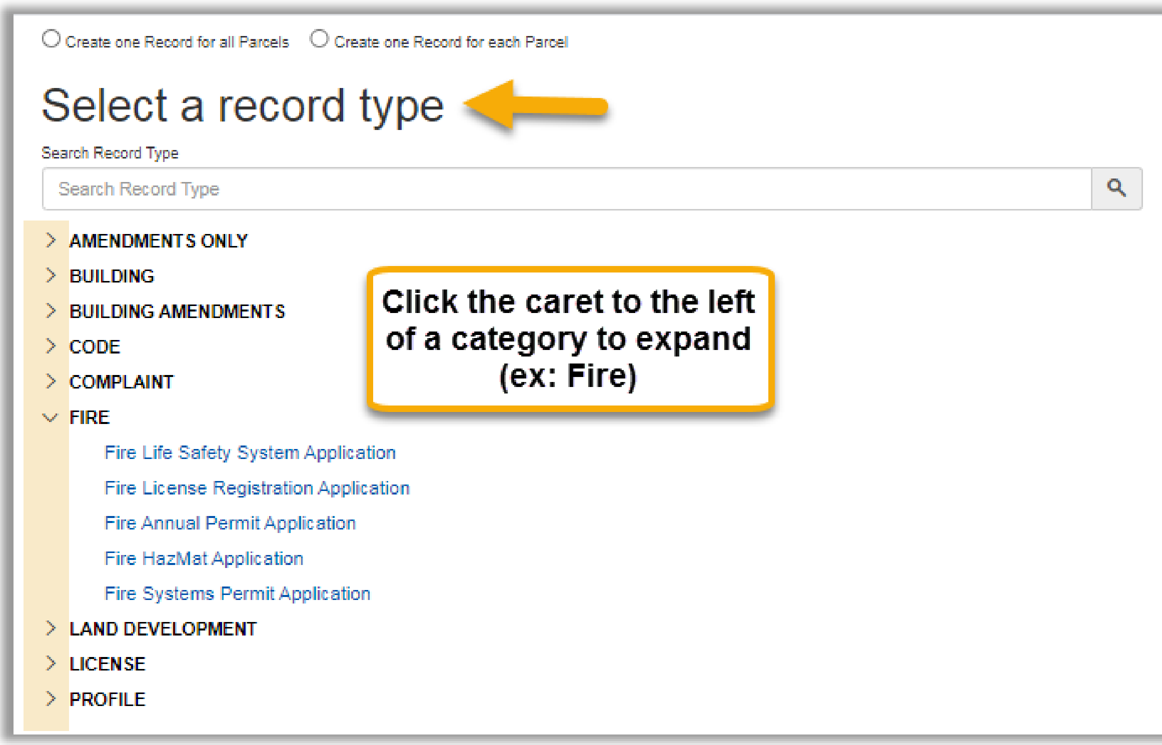
Creating New Records

This section provides instructions for creating new records and amendments. Every application must have a primary contact (for example: engineer, owner, etc). **End-users must set a primary when creating a new record, if it is missed, BuildSA defaults it to the applicant.**

1. **Click** the Launchpad.
2. **Click** CREATE NEW RECORD (shown).



3. The Select a record type page displays (shown).



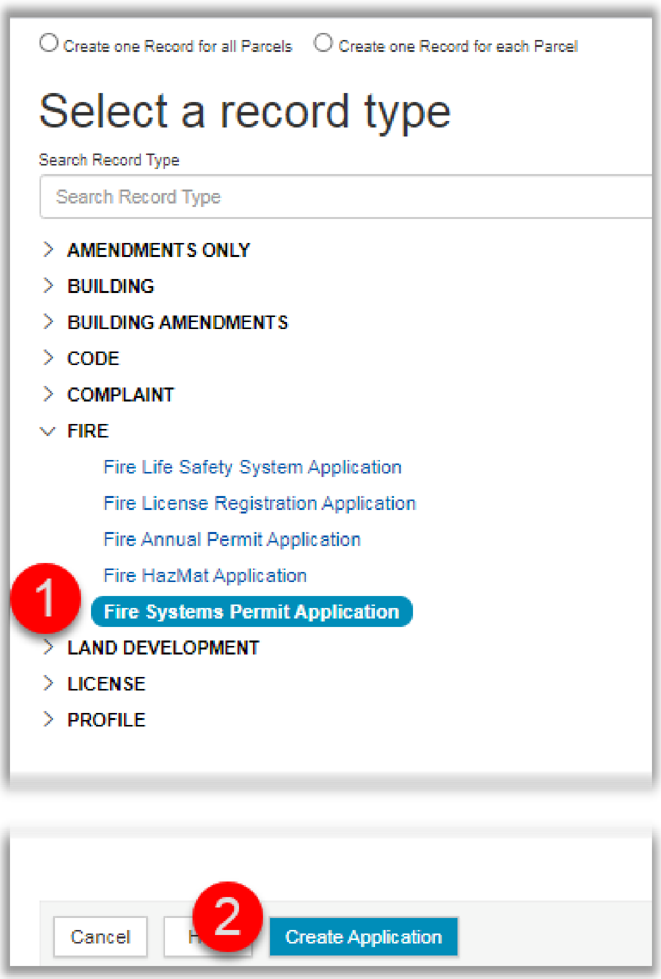
4. **Click** the arrows to the left of a Category to expand Category. Then, click the record hyperlink type you want to create.
5. Amendments are mostly created in the specific Record only using the Cloning function. If Amendment is selected here for specific record-types, BuildSA displays the following message:

(shown).

Three types of Amendments display when the Amendments category expands:

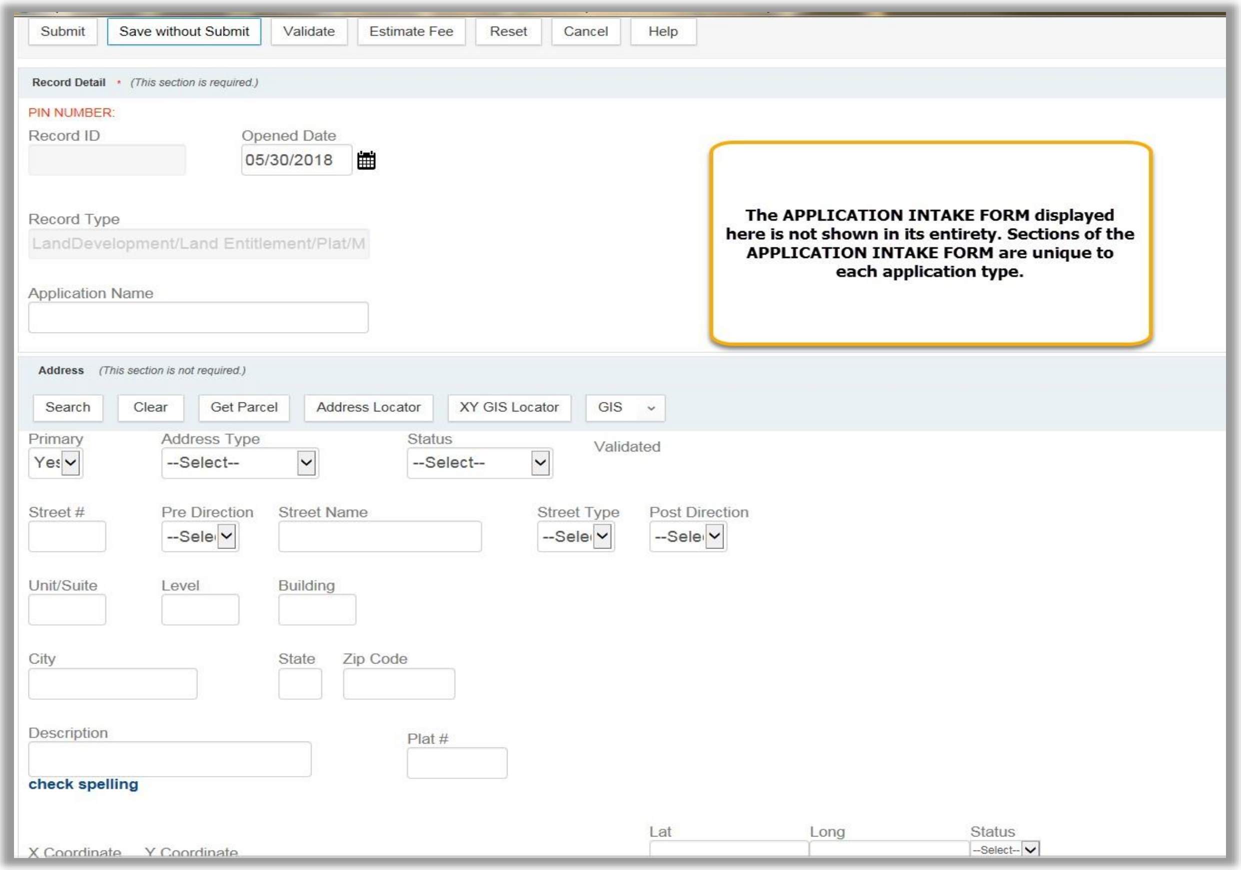
- Add/Remove Contact
- Link/DeLink Company association
- Withdrawal or Refund Request

6. After clicking on your selection, the Create Application tab displays (shown). Click it to display the Application Intake form.



7. The **APPLICATION INTAKE FORM** displays—unique to the *Application* type selected (shown).

IMPORTANT: Always, always, always verify the workflow of any newly created records for accuracy. DSD Staff is able to activate and de-activate a task, if necessary. Application-specific training addresses this function.



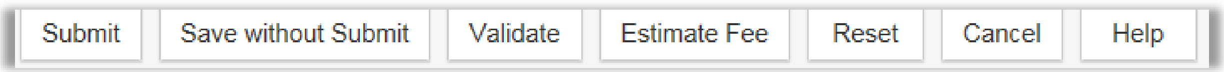
8. **Complete** all required fields. *Note: Required fields are indicated with a red asterisk (*). Required fields must be completed before BuildSA allows the form to advance.*

   ❖ ***Use the Search option before creating a new contact. BuildSA searches the reference database to verify the entry is not a duplicate. This prevents users from creating duplicate contacts.***

9. When finished, **click** *Submit.* BuildSA assigns a unique identification number to the record. **Tip: Jot the number down for easy future reference.**

Button Options on the APPLICATION INTAKE form

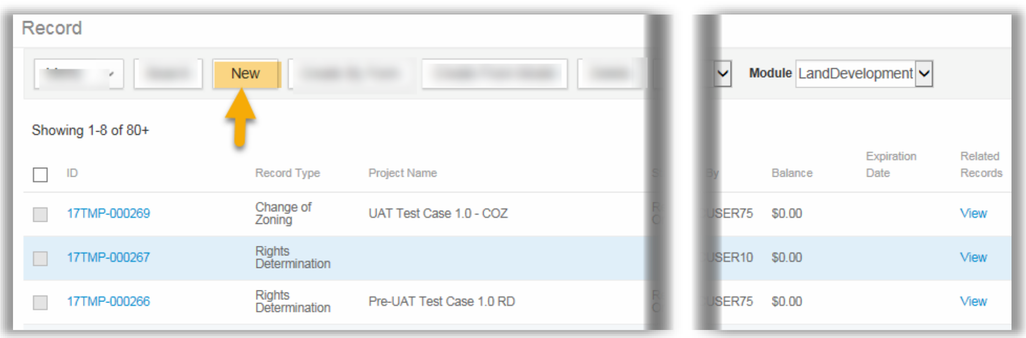
The top and the bottom of the APPLICATION INTAKE form displays a navigation bar with the following tabs. You may use the tabs from either top or bottom.



- ***Submit***: Creates a new record.
- ***Save without Submit***: Saves the record for completion at a later time. A temporary number is assigned. Use Record Search to retrieve the application at a later time and complete it. Global Search does not recognize TEMP numbers.
- ***Validate***: Displays any errors in the form for correction before you click Submit.
- ***Estimate fee***: Provides an estimate of the fees associated with this type of record (not functional at this time).
- ***Reset***: Clears all fields in the Intake form.
- ***Cancel***: Closes the Intake form without saving any data.
- ***Help***: Launches a help menu with more information about Records within BuildSA back-office.

Alternative Option for Creating New Records

New Records may also be created by selecting the *Record* Page using All *Pages.* **Click** the *New* button at the top of the *Record* page (shown). After *New* is clicked, the APPLICATION INTAKE form displays.



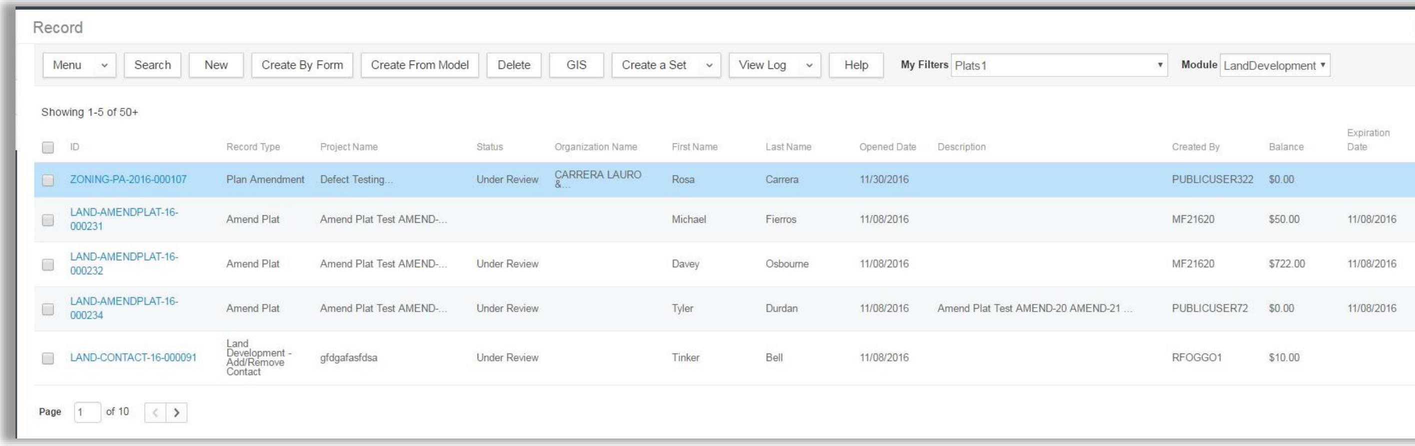
Transactional Records

Transactional records are records that are currently ‘in progression’. This means they are active records with ‘In Progress’ tasks.

Addresses, Parcels, and Owners Information in Transactional Records

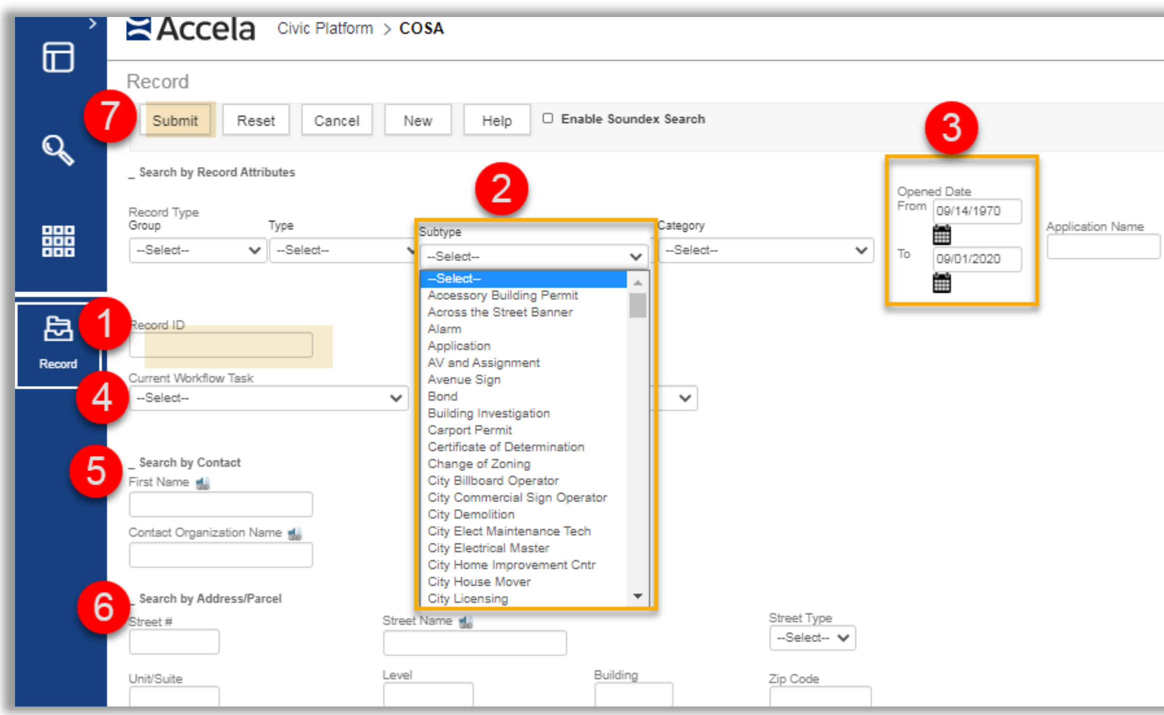
1. **Navigate** to the *Record* Search page to search for a record. You may also use the Global Search.
2. The *Record* search page itself shows record information in detail. Note the information available (shown). Use scroll bar to move left to right and view all information available.

3. Click the Search button from the top of the page to search for a record.



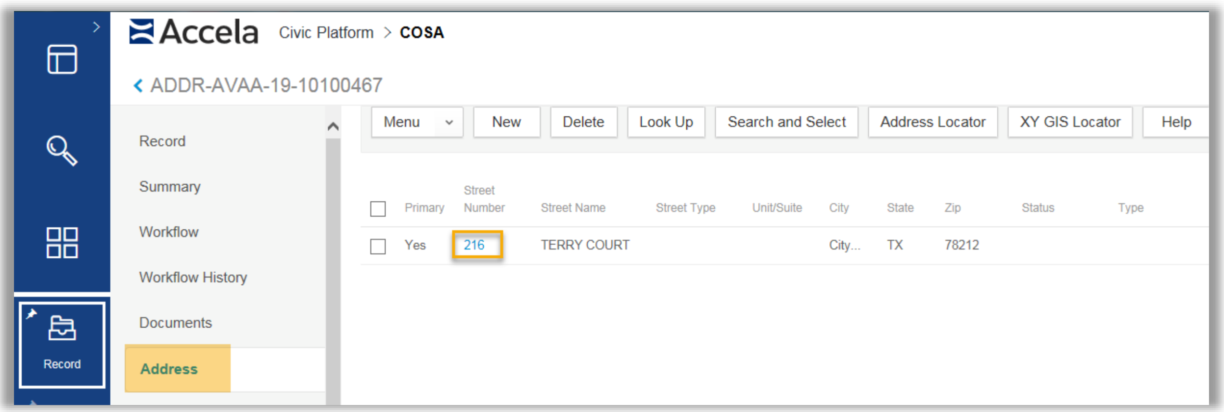
4. **Or, select** a record by clicking on the ID column, blue hyperlink text.

5. To search for a record, click the Search button. A Search page displays (shown).

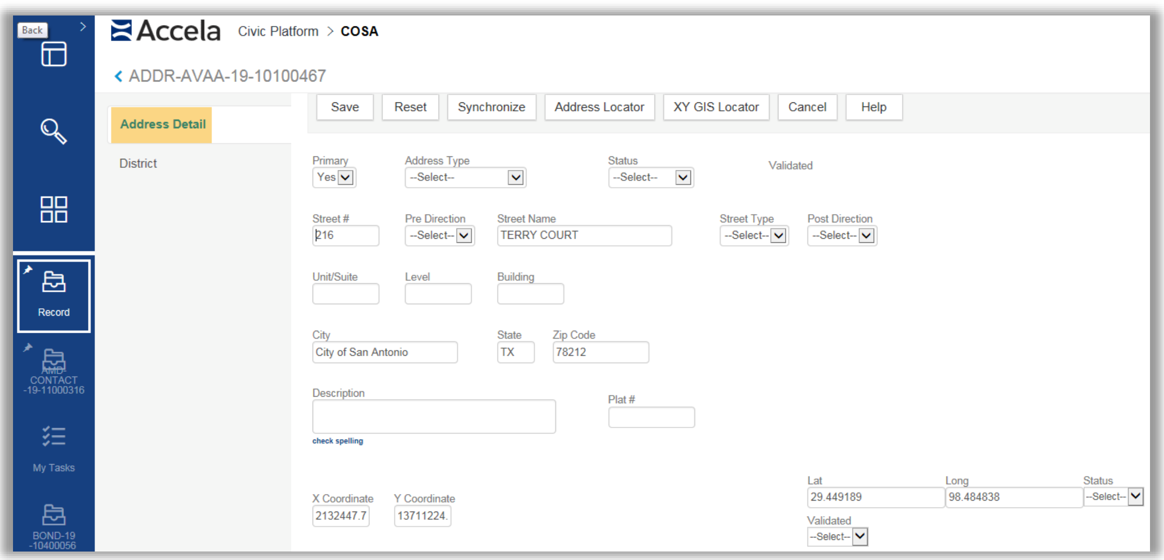


1	Search by Record ID number
2	Refine your search by selecting from the drop-down menus (Group/Type/Sub-Type/Category)
3	Option to select a date range
4	Option to search by Current Workflow Task or Current Workflow Status
5	Search by Contact
6	Search by Address/Parcel
7	Submit button to generate the search

6. After locating and accessing the record, use the record's navigation bar to **click** the Address Tab. View the Address details (shown).

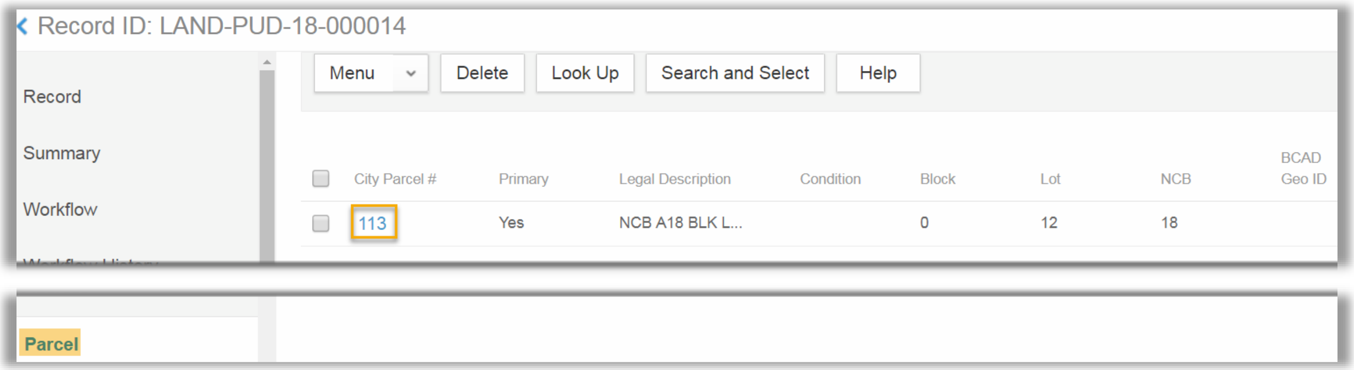


7. The Address page displays (shown). **Click** the *Address* hyperlink. The Address Detail page displays (shown). View information available.

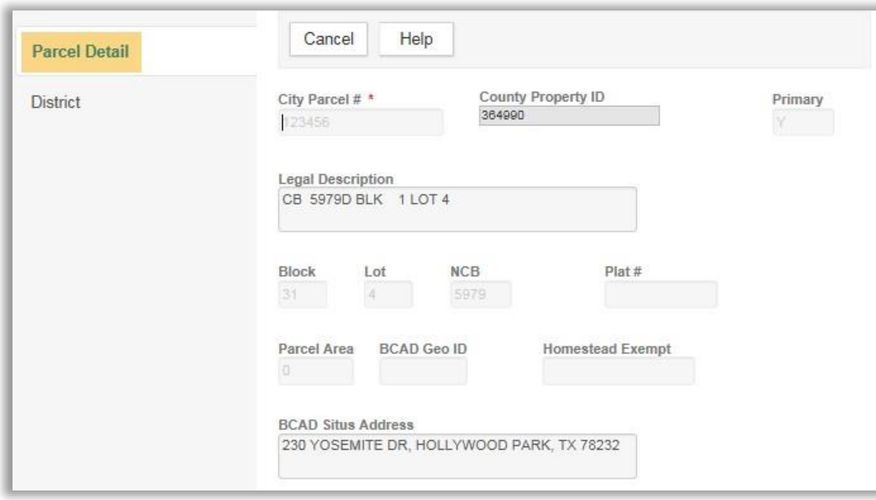


Viewing Parcel Details in Transactional Records

1. **Retrieve** the Record.
2. From the record's navigation bar, **click** the Parcel tab.
3. **Click** the *City Parcel #* blue hyperlink (shown). The *Parcel Detail* page displays (shown). Note text

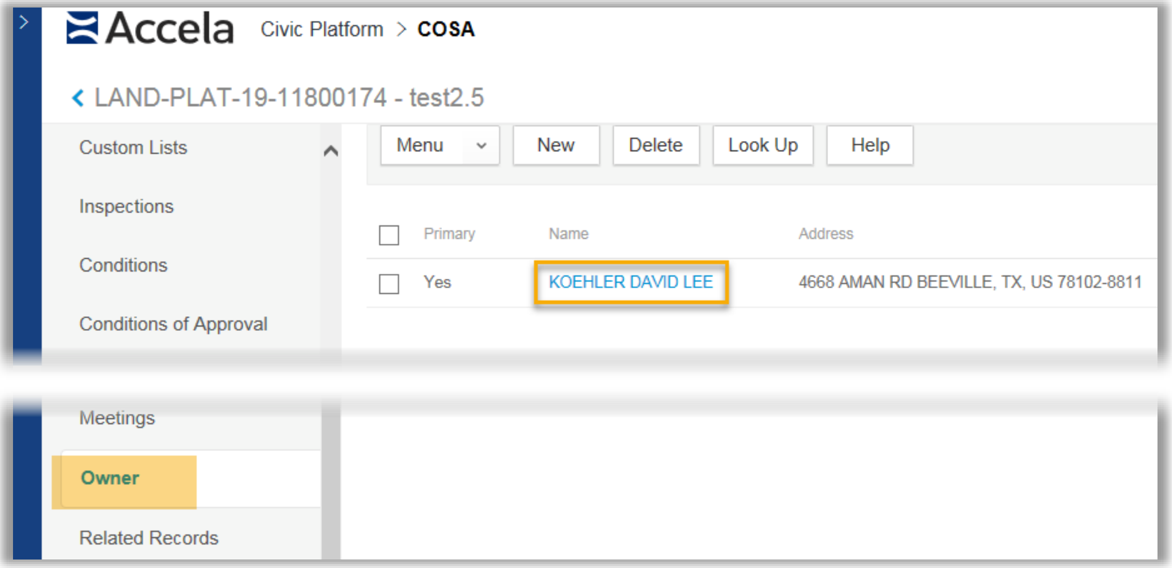


boxes are greyed-out. The information on this page is uploaded from GIS and is read-only.

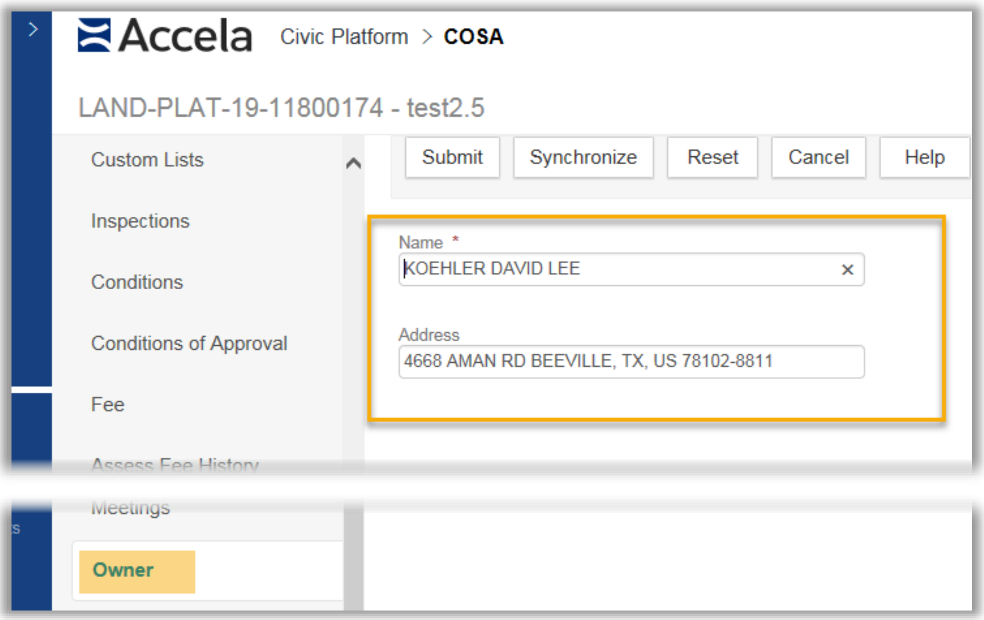


Viewing Owner Details in Transactional Records

1. **Retrieve** the Record.
2. **Click** the Owner Tab using the Record's navigation bar (shown). BuildSA displays the *Owner information* detail page (shown).



3. **View** details by clicking the Name hyperlink (details shown).

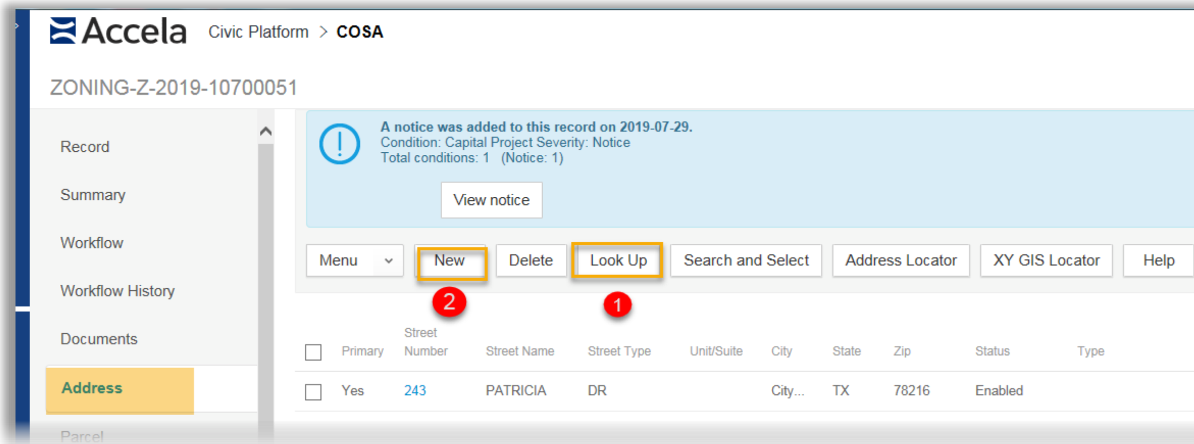


Adding Addresses, Parcels, and Owners (APO) to Records

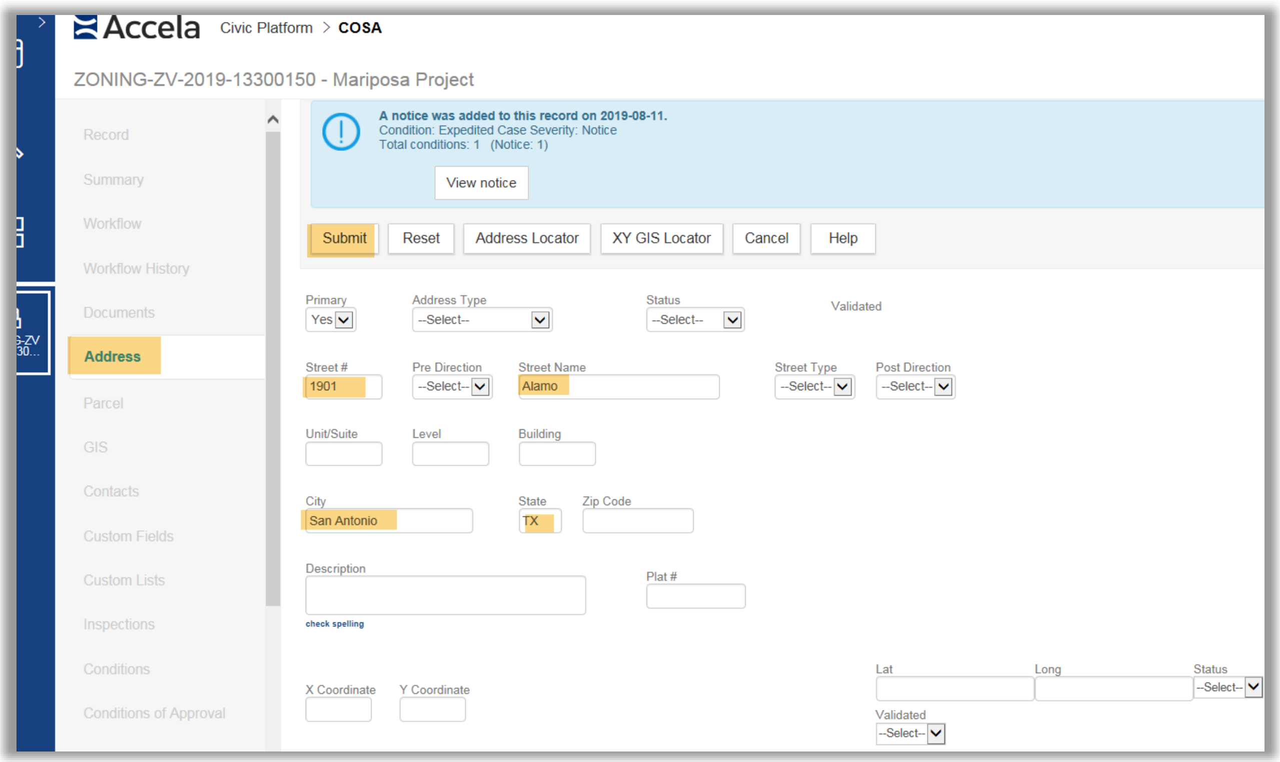
1. **Retrieve** the record.
2. From the Record's navigation bar, **click** the Address, Parcel, Contact or Owner tab.
    - Parcel and Address information are uploaded from GIS. If, after validation of a Parcel or Address in BuildSA, discrepancies exist, please notify the GIS Team. Contact the BuildSA Support Team for further information.
    - Owner information is uploaded from BCAD. If, after validation of Owner, discrepancies of property owner exist, then notify Bexar County. Contact BuildSA Support Team for Bexar County contact information.

Adding an Address to a Transactional Record

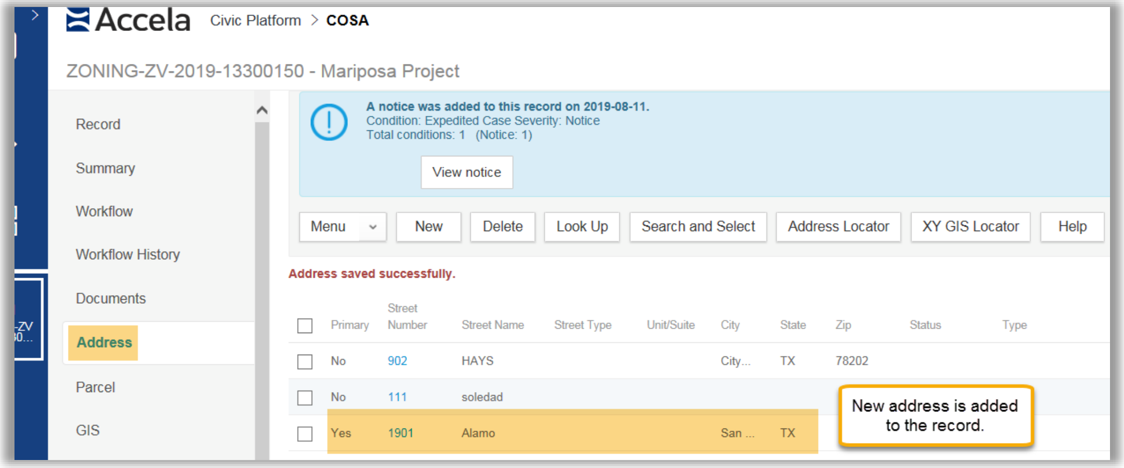
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** the Address Tab.
3. **Click** Look Up (#1) to search for an Address before adding a new address.
4. If the system does not return matches, **click** New (#2) to add a new address to the system.



5. The Address Detail page displays (shown). **Complete** fields with known information. Next, **click** Submit.

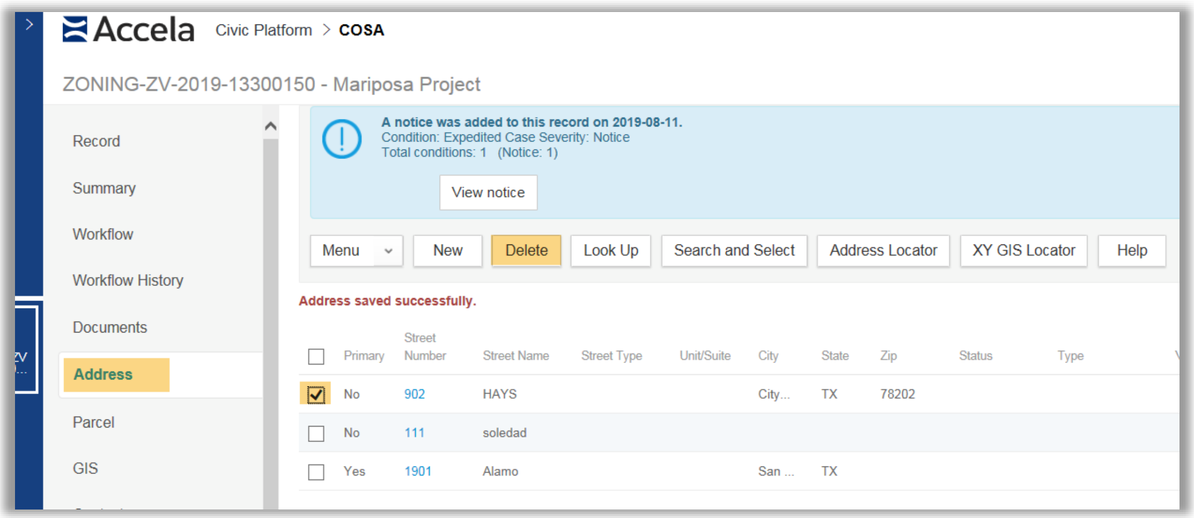


6. After Submit is clicked, the system adds the new address to the record (shown).

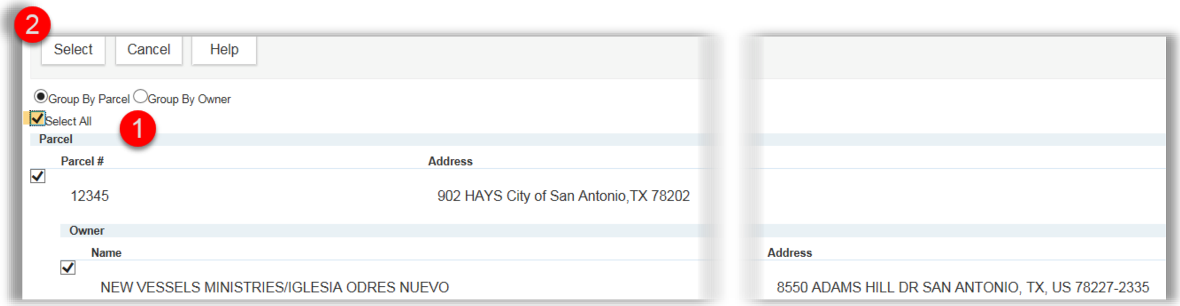


Removing an Address from a Record

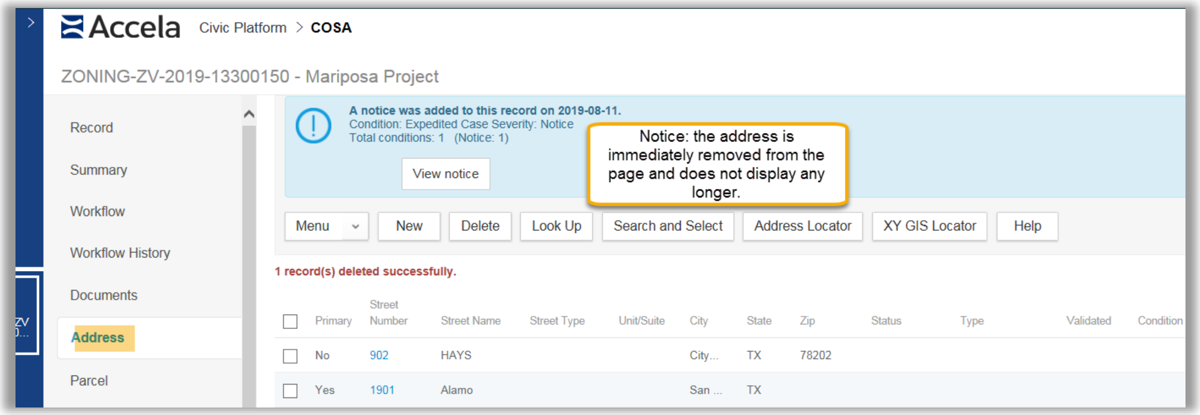
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** the Address Tab.
3. All addresses associated with the record are listed. **Click** the box to the left of the address you want to remove (shown). Next, **click** Delete. Ensure you have required authorization before removing an address.



4. The Address identifier page displays. **Click** the box to the left of Select All (#1).
5. Next, **click** Select (#2).



6. The system returns a message '1 record(s) deleted successfully (shown).



Contacts in the Record

Adding or removing contacts from a transactional record is managed using the Add/Remove Contact Amendment record. Customers with a registered account in Accela Citizen Access may use the Citizen Portal to manage their Contacts.

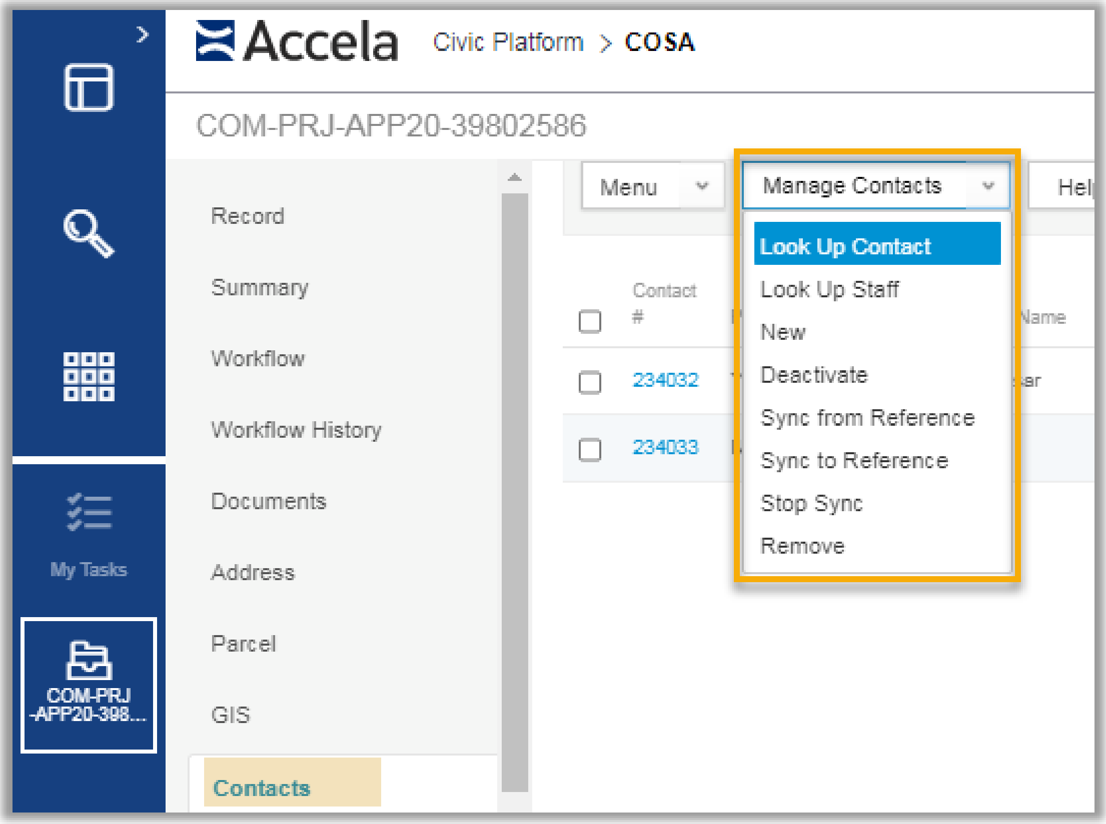
- ***IMPORTANT: The Add/Remove Contact amendment record is not used for requests received by mail, walk-in or phone; DSD Staff performs these changes directly to the parent application.***
  - ***If the request is to add or remove authorized agents from an Escrow Account, DSD Staff creates this amendment in BuildSA back-office.***

Adding a Contact to a Transactional Record

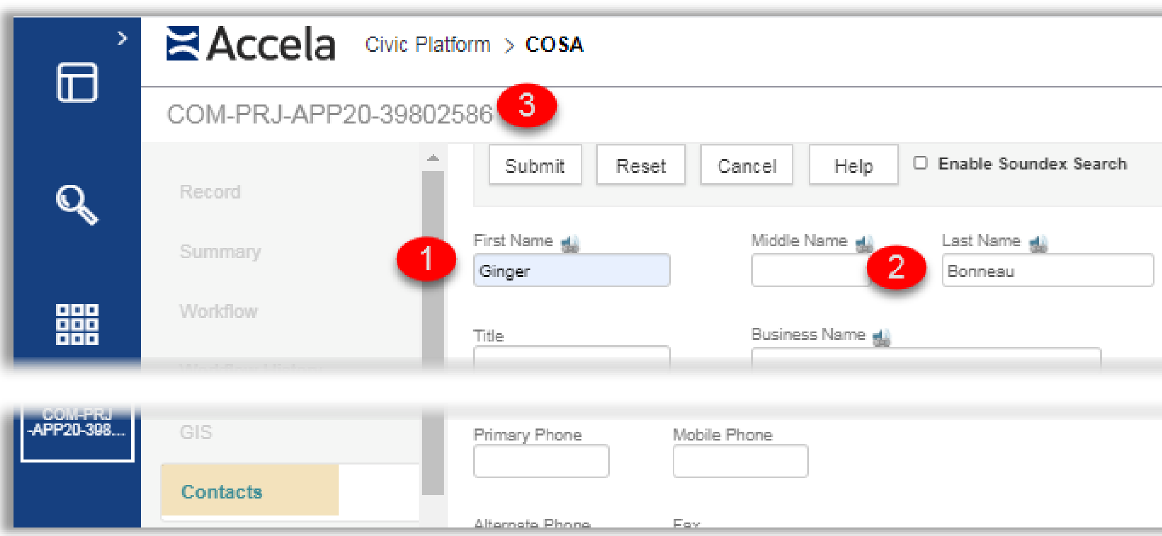
1. **Retrieve** the Record (#1 shown).
2. From the Record's navigation bar **click** the Contacts Tab (# 2 shown).
3. **Click** the Manage Contacts drop-down menu (shown). **Proceed** in one of three ways:
   a. Select **Look Up Contact** (#3 shown). The Search Contact form displays (shown).
   b. **Type** information known. **Click** Submit (shown).

- ***Note: Deactivate, Sync from Reference, Sync to Reference, Stop Sync options are out-of-the-box functionality and not in use.***

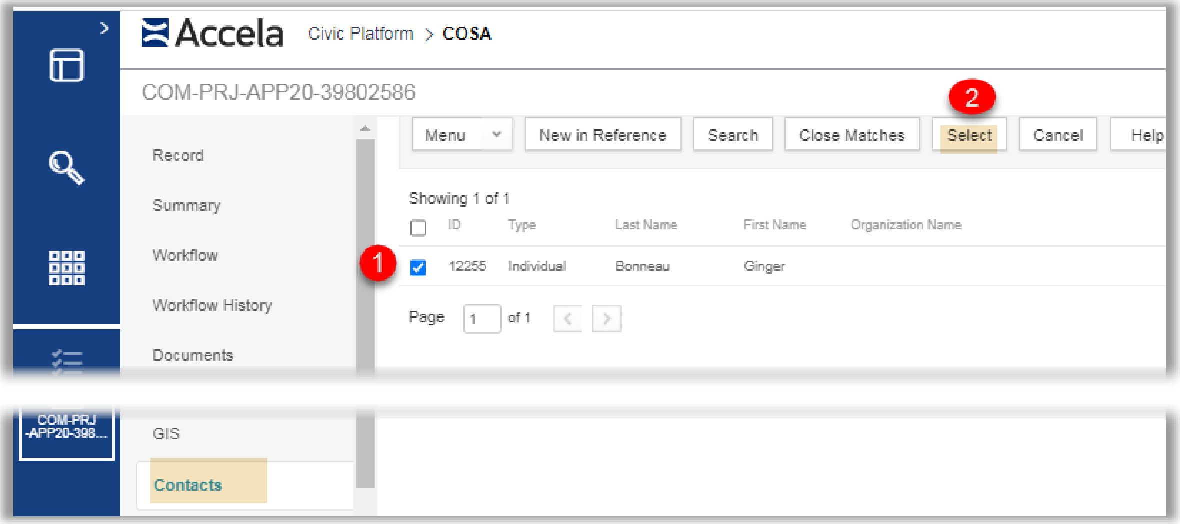
❖ ***IMPORTANT: Always select Look Up Contact before adding a Contact. Doing so eliminates duplicates in the system.***



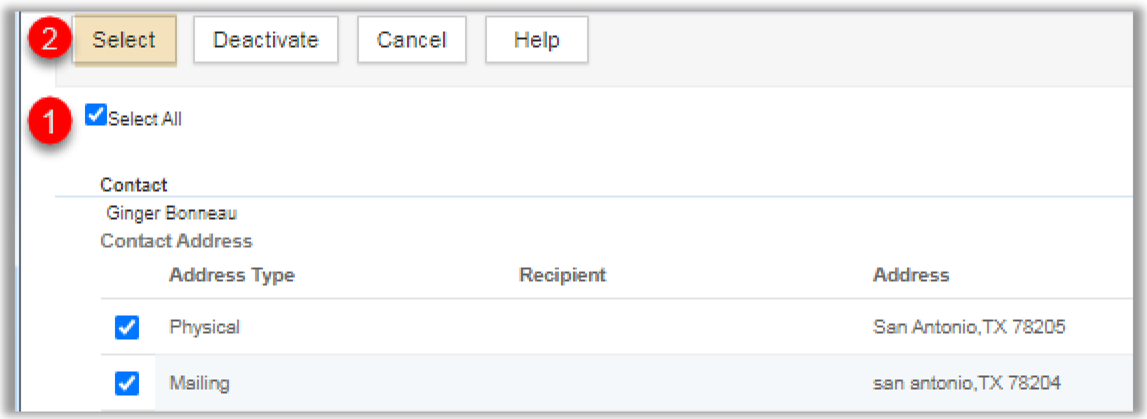
4. The search form displays. Complete fields with information known (first/last name, organization name, email, etc.)
5. **Click** <u>Submit</u>.



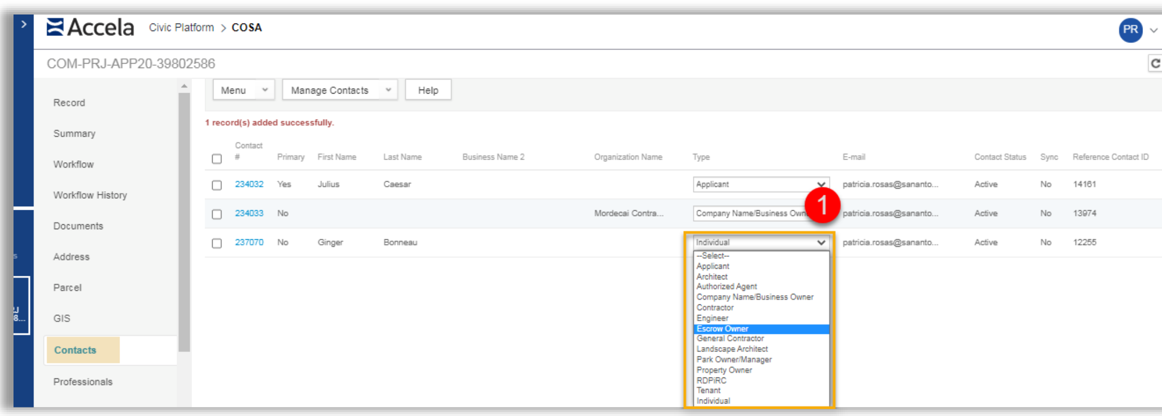
6. BuildSA returns all matches. **Click** the box to the left of your selection (#1).
7. **Click** Select (#2).



8. BuildSA displays the new contact's mailing and physical addresses. **Click** the box to the left of Select All (#1).
9. **Click** Select (#2).



10. The Contact is added to the Record (shown). BuildSA displays a '*1 Record(s) added successfully*' message (shown). **Select** the Contact Type from the drop-down menu (#1 shown).

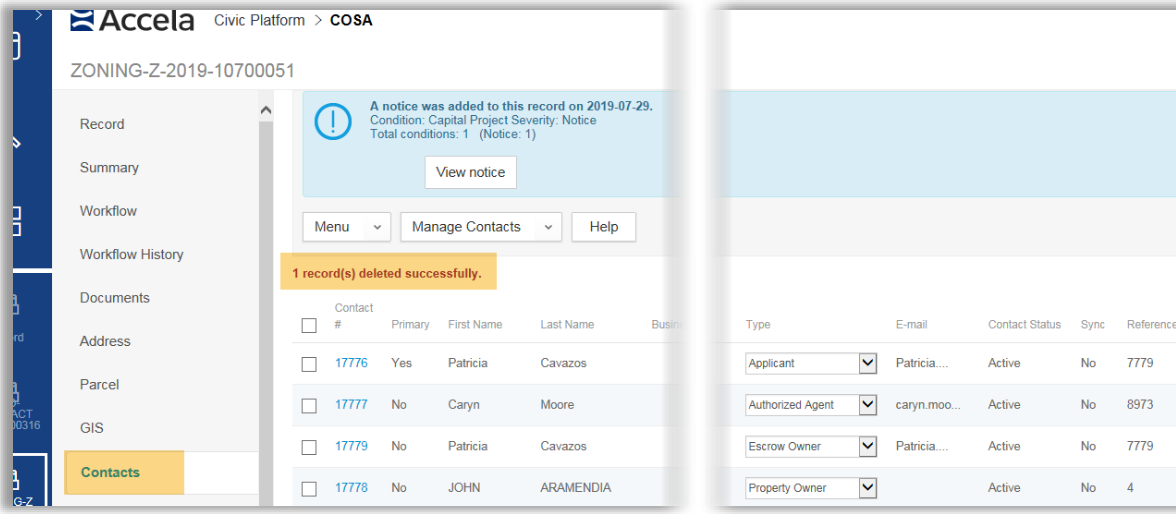


Removing a Contact from a Transactional Record

It is important you have all proper authorization before removing a contact from a customer's record. Check with your supervisor.

Before removing any contacts from any transactional record, ensure you have all proper authorization before doing so**. Follow business processes at all times.** If you have any questions, please see your supervisor.

1. **Retrieve** the Record.
2. From the Record's navigation bar **click** the Contacts Tab.
3. **Click** the box to the left of the Contact you are removing.
4. **Click** the Manage Contacts drop-down menu.
   a. Select **Remove.**
   b. **BuildSA** displays a '*1 record(s) deleted successfully*' (shown).



Editing Contact Types in a Record

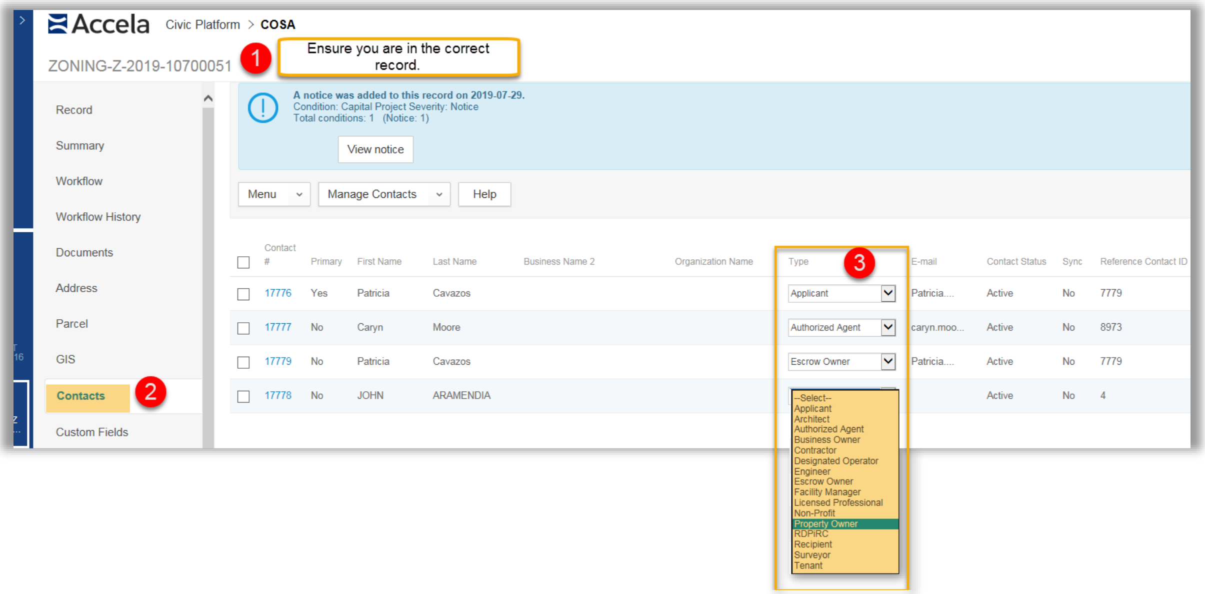
End-users are able to edit contact type information on a record. Before editing any contact type information ensure you have all authorizations needed. Follow business processes at all times. If you have any questions, please see your supervisor.

Before changing a Primary Contact type on a record; ensure that all fees are paid in full. A primary contact cannot be changed in a record if there are any fees pending.

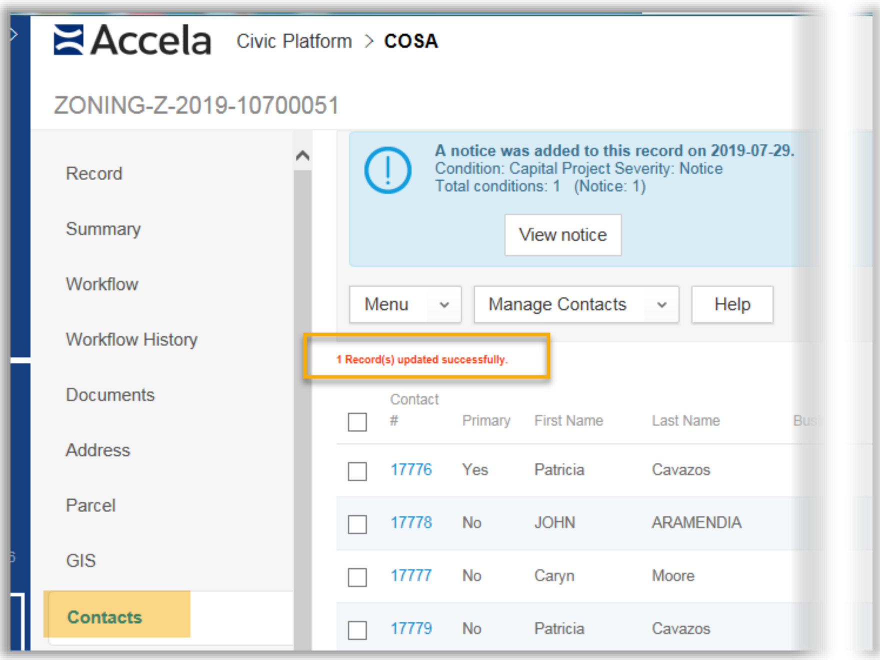
To edit a Contact Type on a record

1. **Retrieve** the Record (#1).
2. From the Record's navigation bar, **click** the Contacts Tab (#2). All Contacts display on this page.

3. To change the contact type, **select** a type from the Type drop-down menu (#3).



BuildSA updates the record contact with the new type and displays a '*1 record updated successfully*' message (shown).



New Contacts

Always search for a Contact <u>before</u> creating a new contact to avoid duplicate contacts in the system!

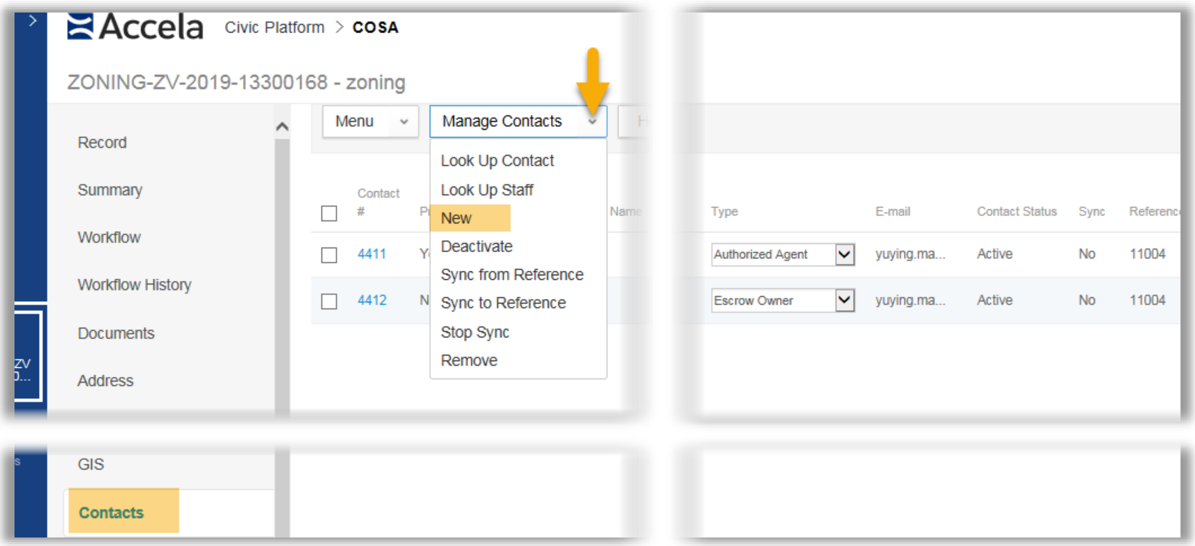
For new Contacts, always type a physical and a mailing address, even if they are the same, this information pre-populates the **APPLICATION INTAKE FORM** when creating new records.

- ***IMPORTANT: Never use the option to Merge a Contact! If you have any questions, please contact the Organizational Change Management Team. (buildsaocmteam@sanantonio.gov).***

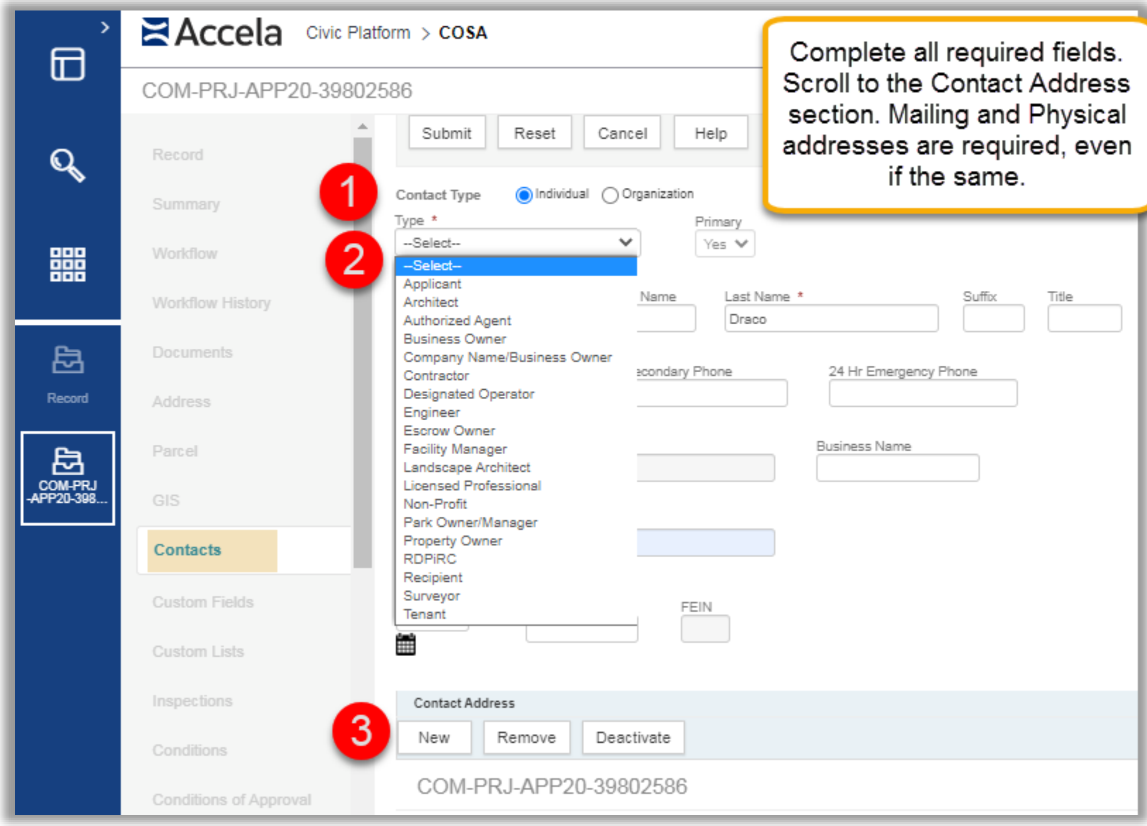
The best practice for adding a contact to a record is to search for and select a contact from existing reference contacts. This method enables you to save time by applying the reference contact information to the record. This also avoids duplicate contact information in the database.

To add a New Contact to a Record

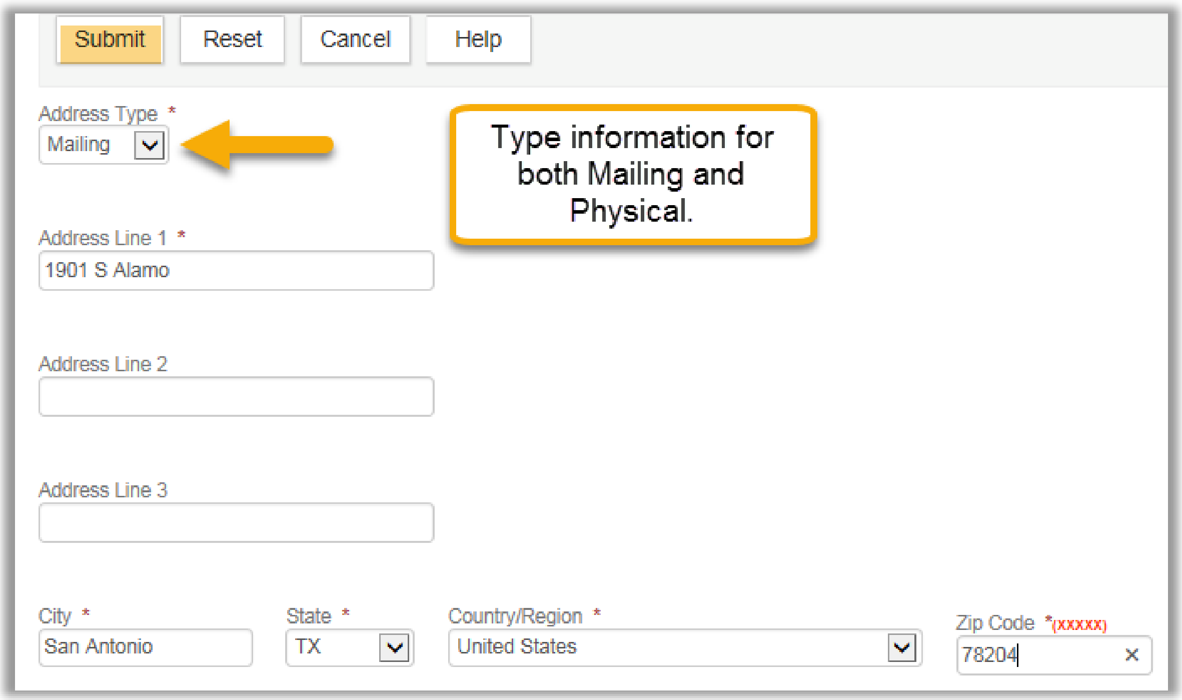
1. From the Record's navigation bar, **click** the Contacts Tab.
2. **Click** Manage Contacts drop-down menu arrow (shown).
3. **Click** New (shown).



4. **Click** to select Individual or Organization (#1). From the Type drop-down menu, **click** to select New Contact Type (#2). **Complete** all required fields.

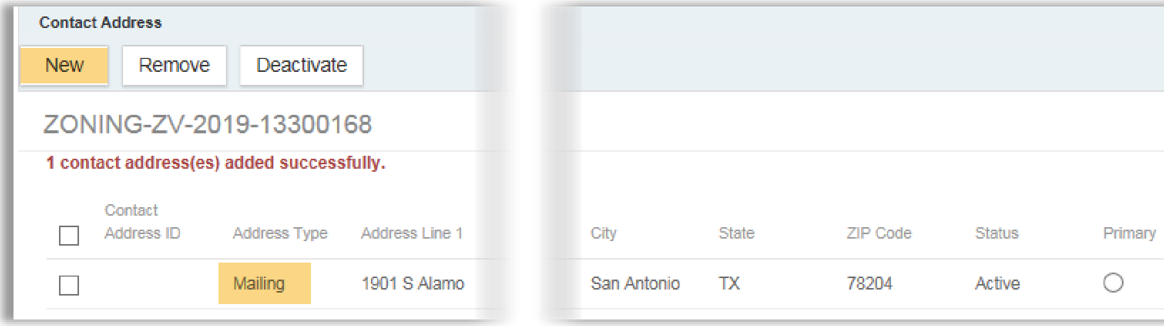


5. **Scroll** to the Contact Address section of the page (#3). **Click** New. The New Address form displays (shown).

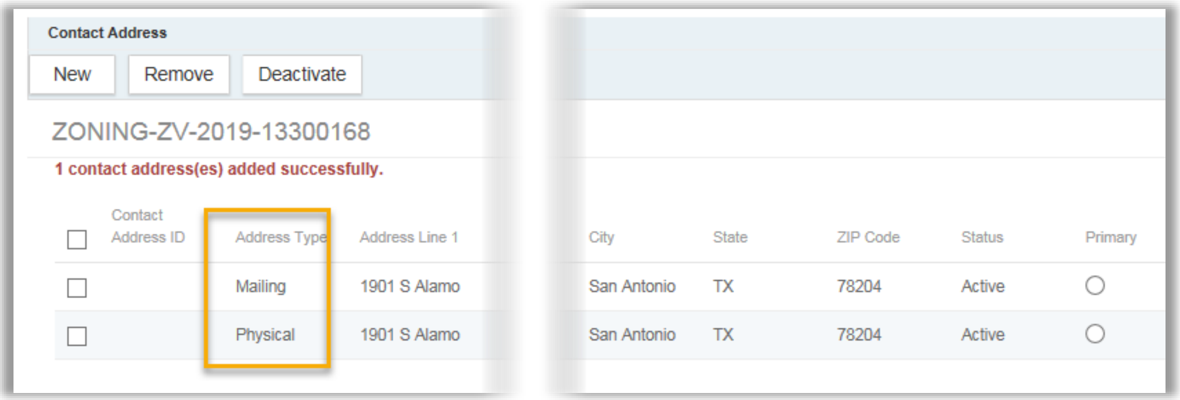


6. **Type new address. Use** Address Line 2 and Address Line 3 for Suite, Building, Level or Apartment information.

7. **Click** Submit. **Repeat same steps for Physical Address type---even if the same.**
8. The New addresses are added to the Contact Address section (shown). BuildSA displays a *1 contact address(es) added successfully* after each addresses is successfully submitted.



9. When the Contact Address section is complete, both Mailing and Physical addresses display (shown).

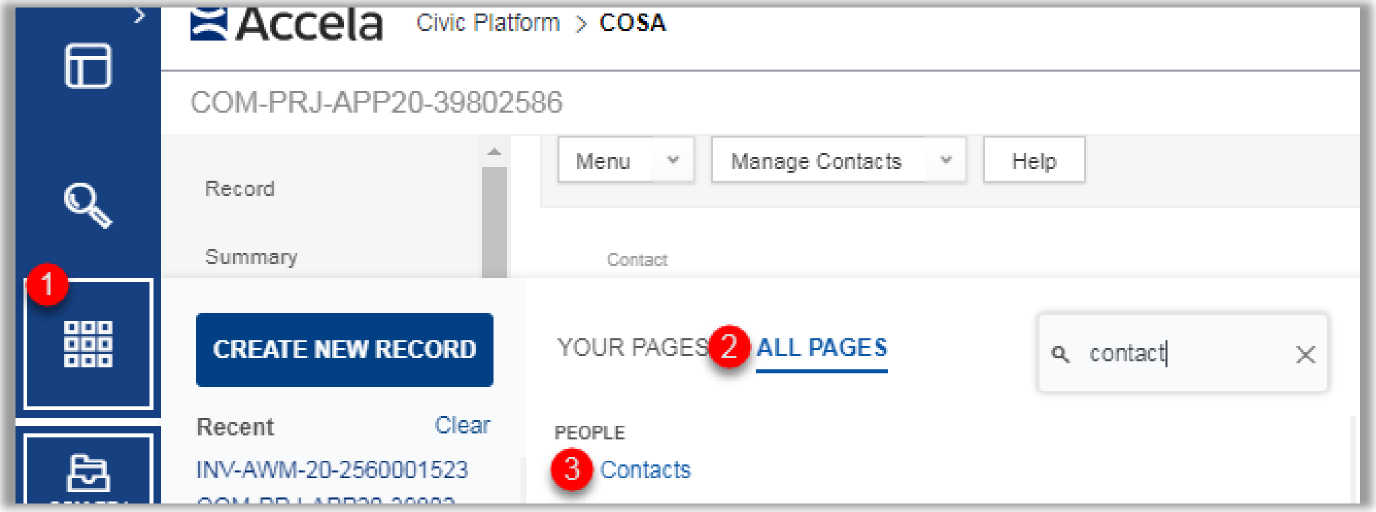


10. To Remove or Deactivate an Address, click the box to the left of the address and click Remove or Deactivate button.

Adding a Contact to BuildSA back-office

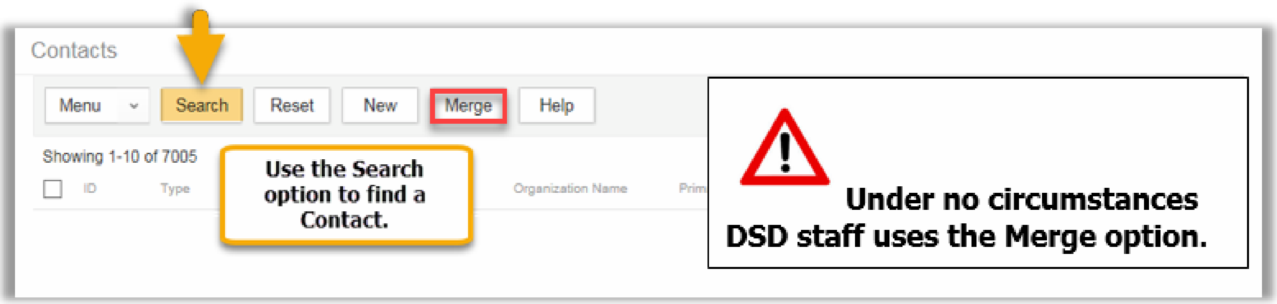
- ***NOTE: Important points about adding Contact(s):***
  1. ***BuildSA requires every application to have a designated primary contact.***
     i. ***Always type a physical and mailing address for the contact, even if it is the same.***

1. From the Launchpad (#1) **navigate** to All Pages (#2).
2. **Search** for Contacts (#3).
3. **Click** the Contacts hyperlink (#4).

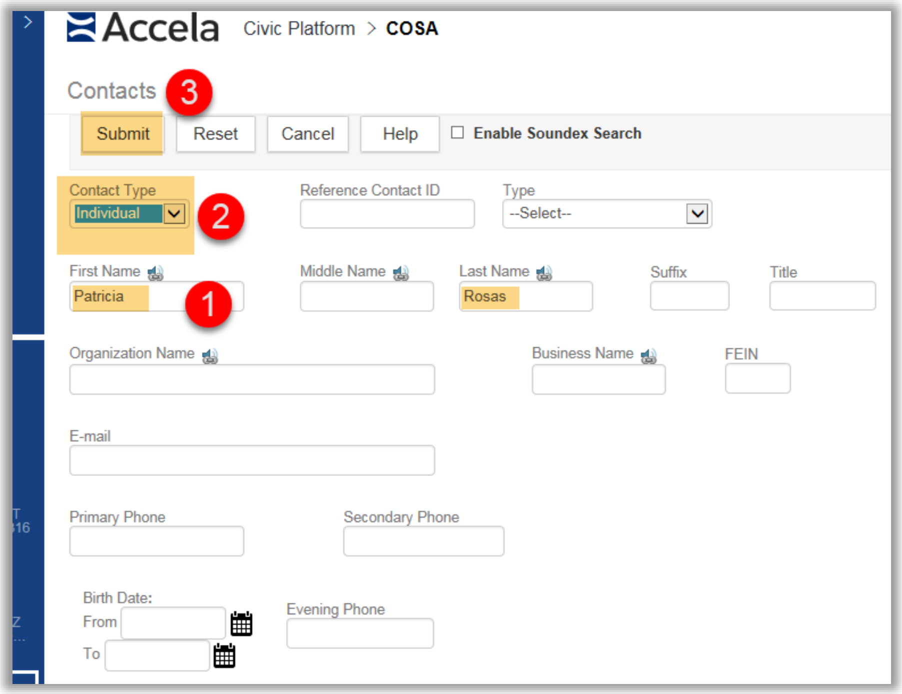


❖ ***Always search for a contact before creating a new contact.***

4. The Contacts Search Page displays. **Click** Search (shown).



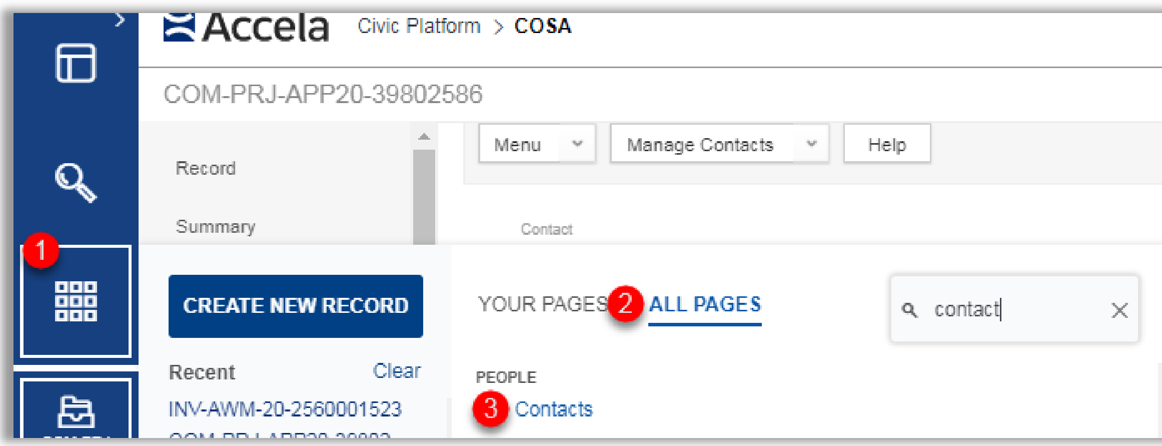
5. **Select** Contact Type (Individual or Organization) (#2). **Complete** fields with known information (#1).
6. **Click** Submit (#3).



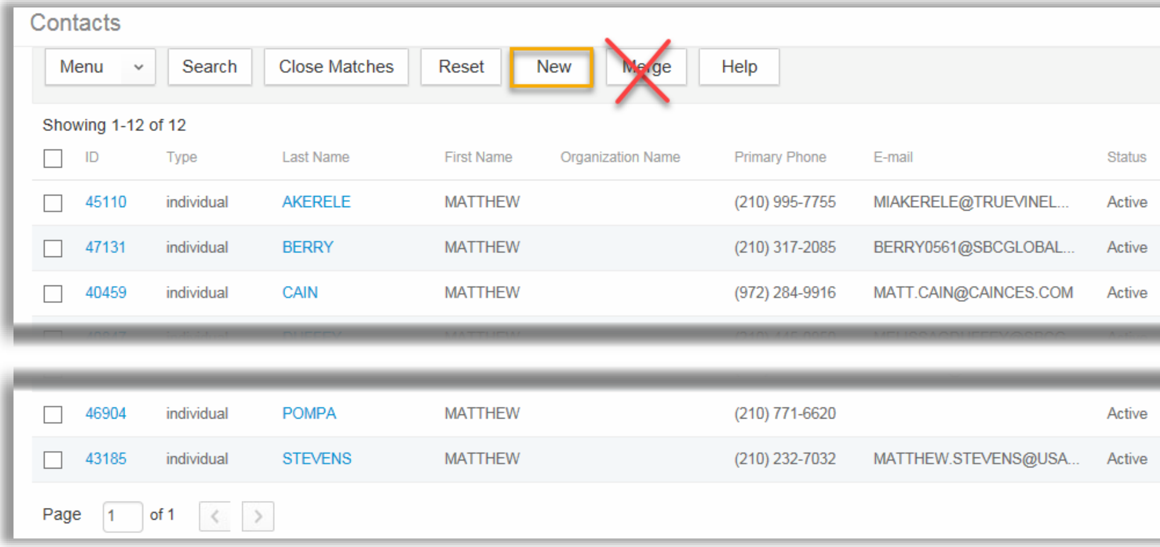
7. After conducting a Search, if BuildSA does not find a match, then **create** a *New* contact.

Create a New Contact

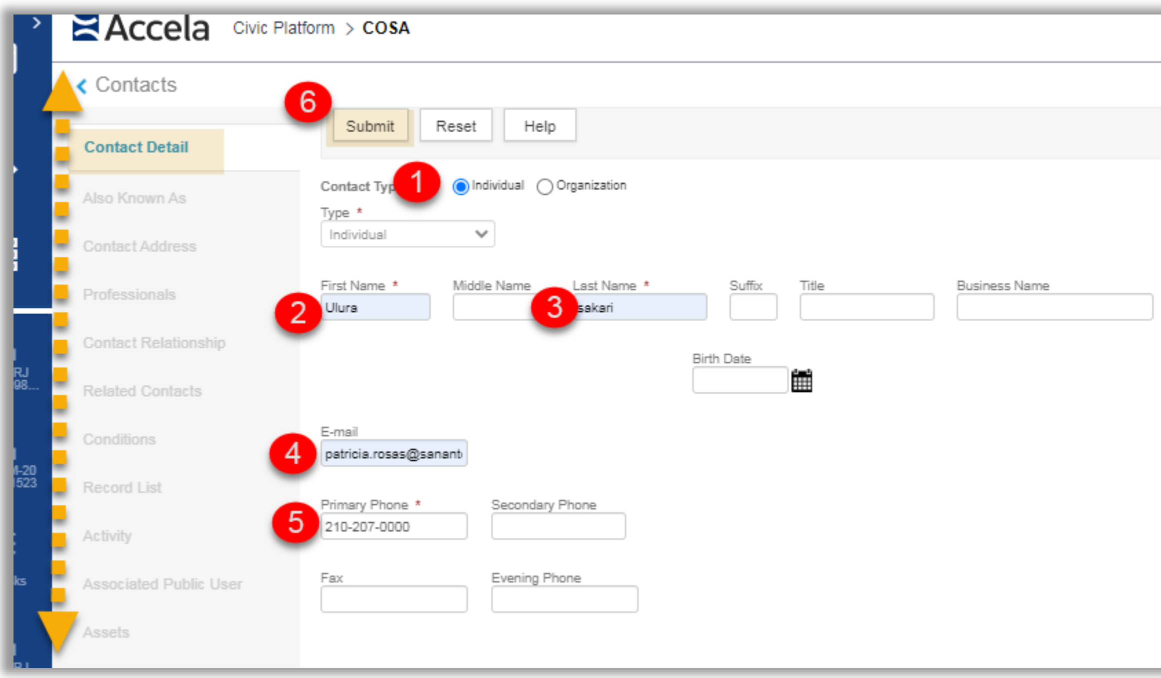
1. From the Launchpad (#1), **click** to select All Pages (#2). **Filter** for Contacts.
2. **Click** the Contacts hyperlink (#3).



3. The Contacts Search page displays, **click** the *New* button (shown).

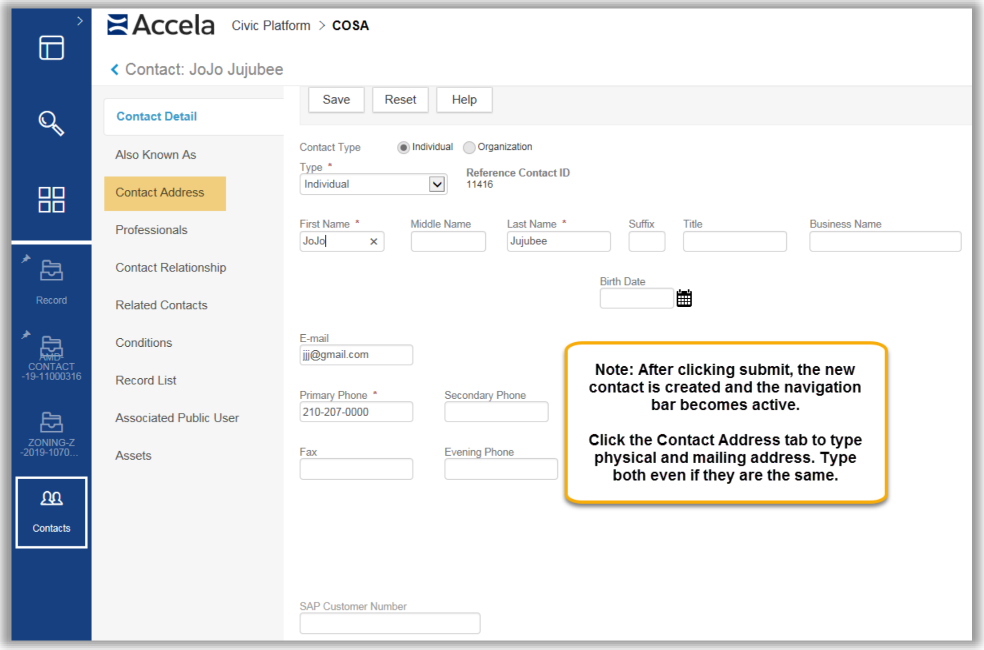


4. The Contacts Details form displays (shown). **Click** to select *Individual* or *Organization* from the Type drop-down menu (#1).
5. **Complete** required fields with available data (#2, #3).
6. **Ensure** email address is captured, if available (#4).
7. **Type** Primary Phone number (#5).



8. **Click** *Submit* (#6). The New Contact is created in the Database. BuildSA returns a *Reference contact created successfully* message. The Contact detail navigation bar becomes active (shown).
9. **Navigate** to any of the Tabs available on the navigation bar to add information as necessary (Example: Also Known As, Contact Address, Contact Relationship, Related Contacts, Conditions, etc).
10. **Click** *Save*. After updating information, BuildSA displays the message *Reference contact updated*

successfully.



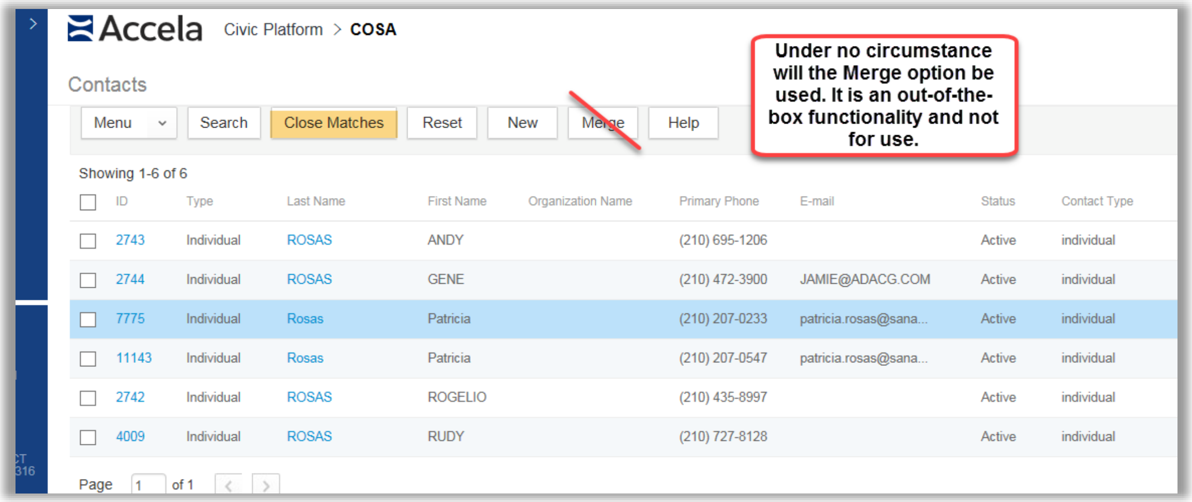
11. **Click** the *Dashboard Toggle* button to return to your desktop or **click** the Launchpad icon to return to the Launchpad.

More About Contacts

A contact is any significant party involved in the application process such as the applicant, business owner, company, authorized agents, escrow owner, property owner, contractor, LP, Neighborhood Association, etc. Use the Contacts page to view, edit, or add information about individuals or organizations associated with records.

Close Matches

Usually a search operation returns the contacts that exactly meet the search criteria. Sometimes the user finds that the search results does not include the contact they intended to find. Perhaps the user mistyped some criteria. In this case, use the *Close Matches* button that displays on the menu bar of the Search Return page to find all the close matches for the search criteria (shown).



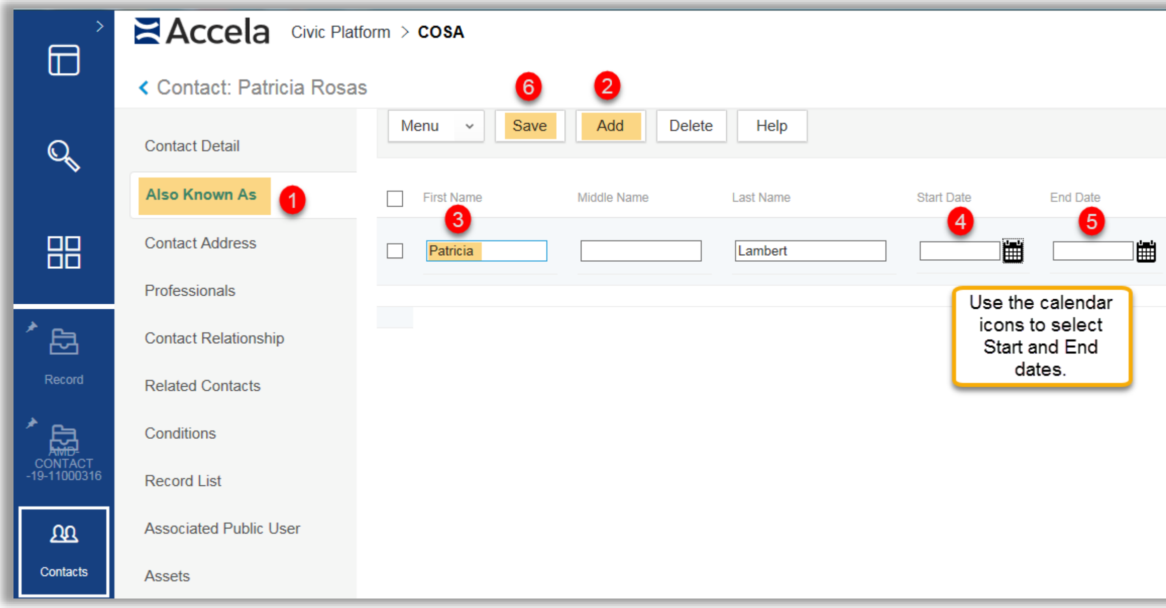
Editing a Contact in the System

If you need to update contact details, you can search for and modify the contact using the All Pages/ Contacts page. Edited information to a contact is systematically synchronized to existing records and to new records that users create and associate with the contact.

❖ ***IMPORTANT: Only the following areas on a Contact's profile may be edited:***

- ***Telephone number***
- ***Email address***
- ***Address***

❖ ***IMPORTANT: If editing the Contact's name, the Also Known As tab (#1 shown) on the Contact page navigation bar (shown) may be used to record information. For example a name change due to a marriage, divorce, etc.***

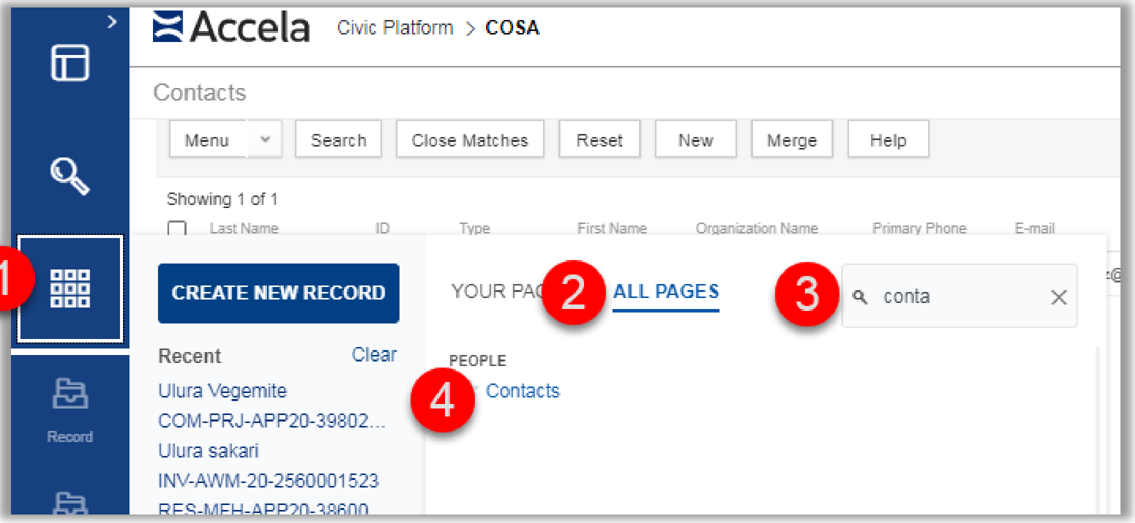


Conditions and Contacts

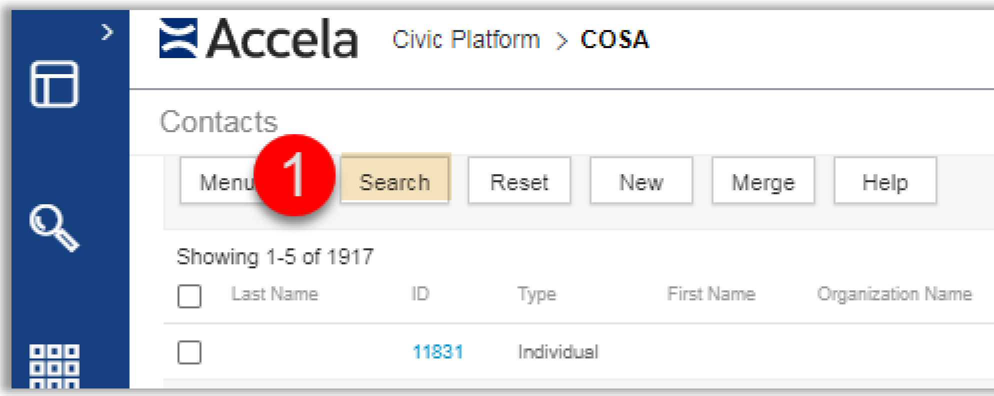
Conditions (notices) may be added to contacts. When a condition is added to a contact certain requirements are set on the contact. These requirements must be fulfilled before further actions proceed. Conditions do not necessarily impose holds; however, they may prolong the workflow process until they are met. Customers are able to view conditions in ACA by default. Before applying a condition to a contact, verify with your supervisor whether to apply the condition and the severity of the condition. More than one condition may be added to a contact. If adding a condition in a record, you have the option to select whether a condition is inheritable—in other words, will child records cloned from the original (parent) record carry the condition.

To add a condition to a contact

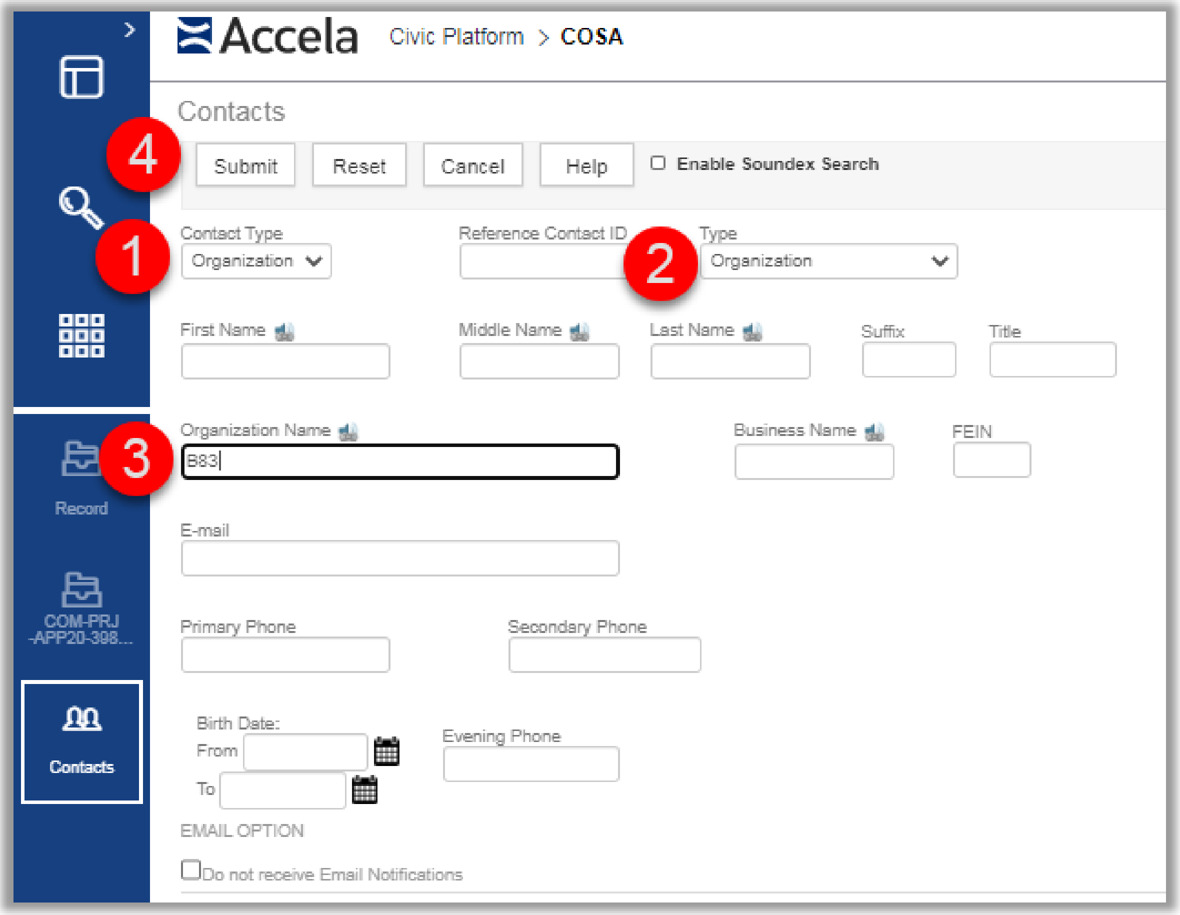
1. From All Pages, **search** for the Contacts page. Launchpad>All Pages>filter for Contacts>Contacts



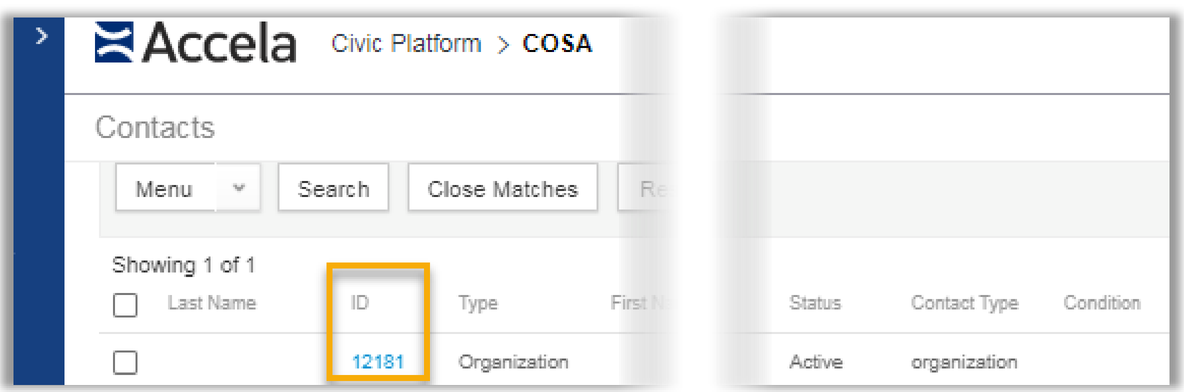
2. The Search page displays. **Click** <u>Search</u> (#1) to search for the Contact.



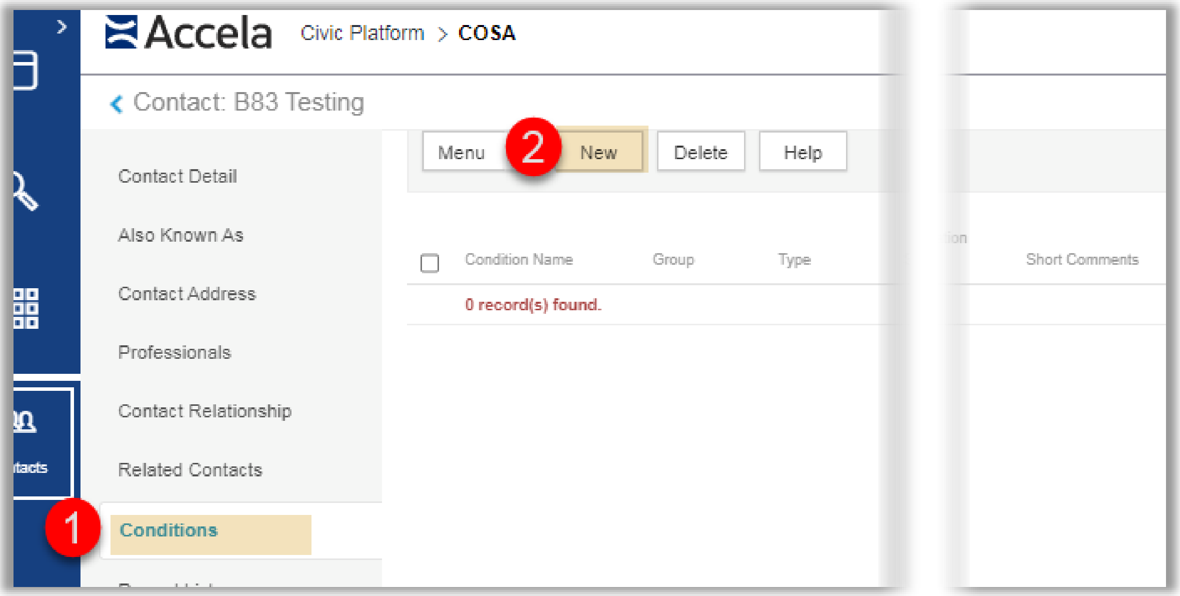
3. The Contact search page displays (shown). **Click** to select Contact Type (#1 and #2).
4. **Type** known information (#3).
5. **Click** <u>Submit</u> (#4).



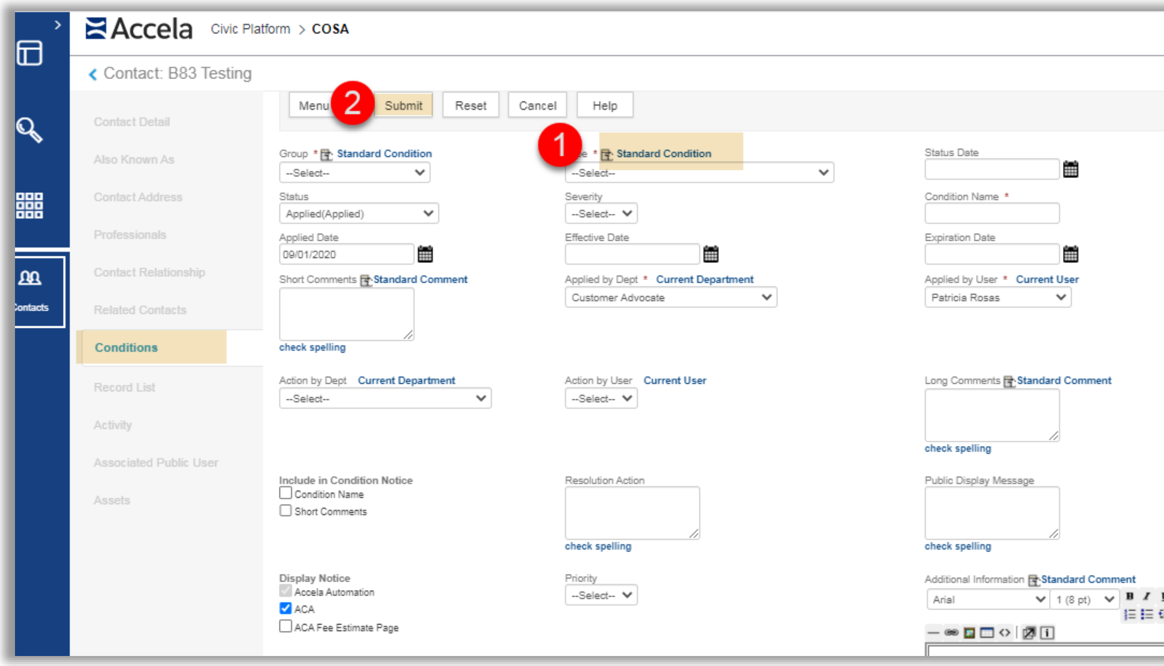
6. BuildSA returns all matches. **Click** the ID hyperlink to access the Contact detail page (shown).

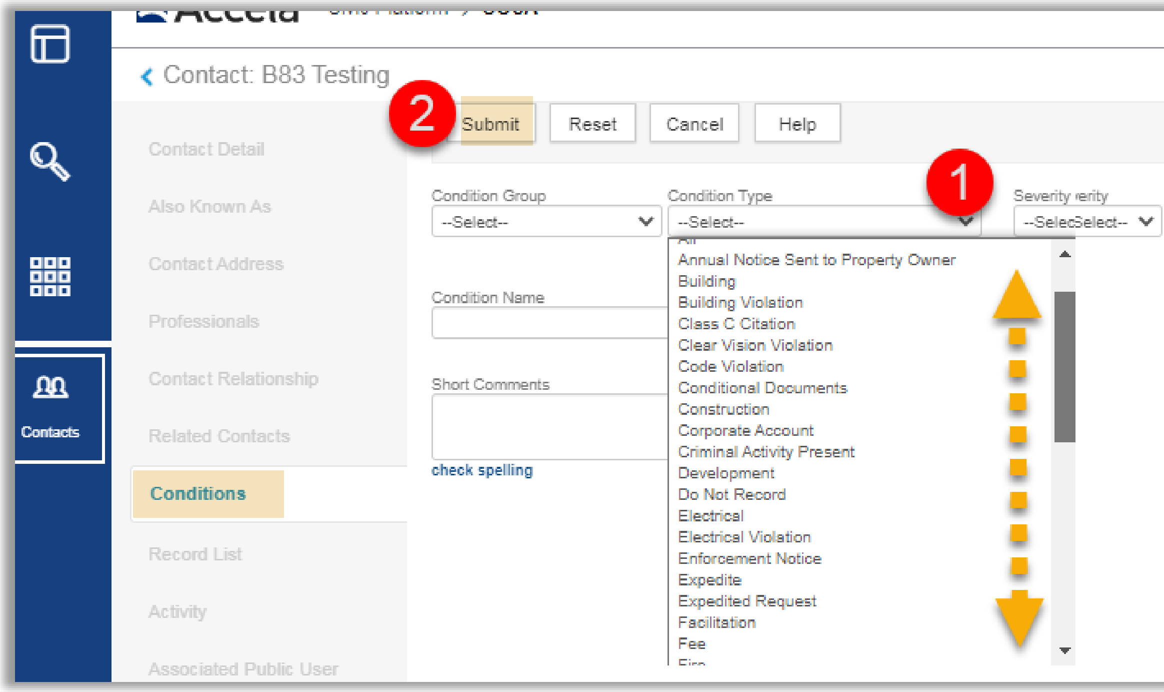


7. From the Contact record's navigation bar, **click** the Conditions tab (#1).
8. **Click** New (#2).

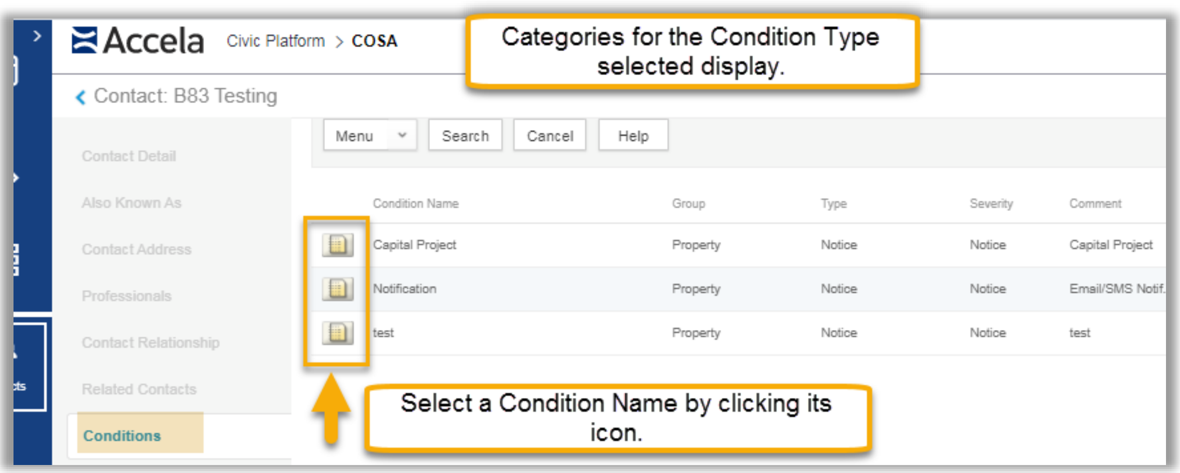


9. **The Conditions template displays (shown). Click the Standard Condition link (#1) on this page.**
10. **Click Submit (#2).**

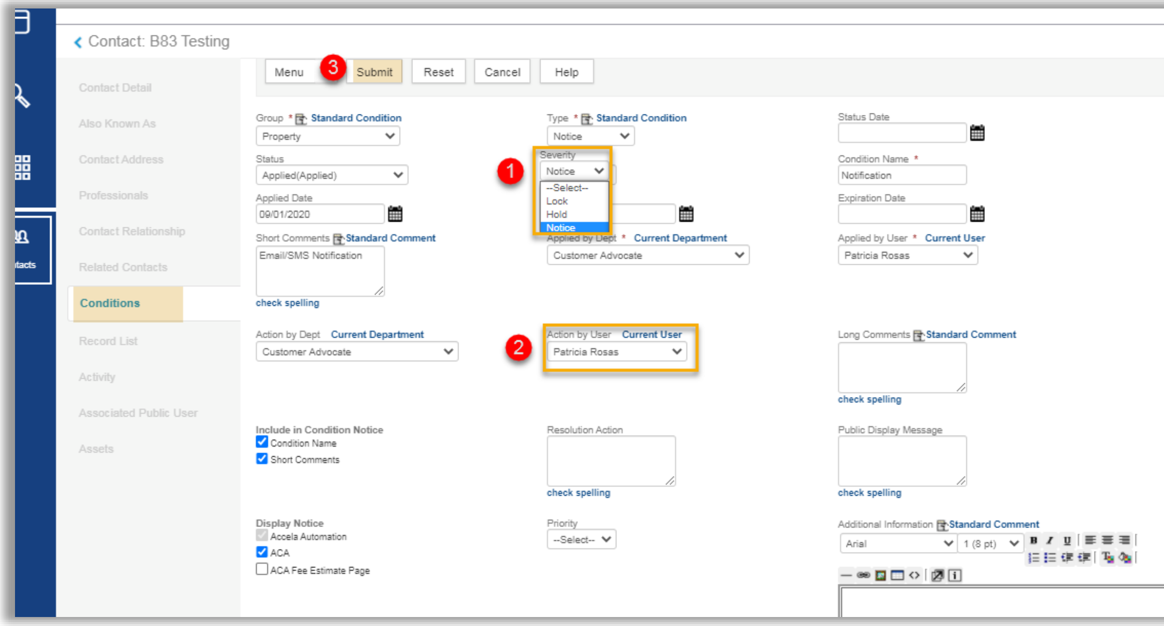




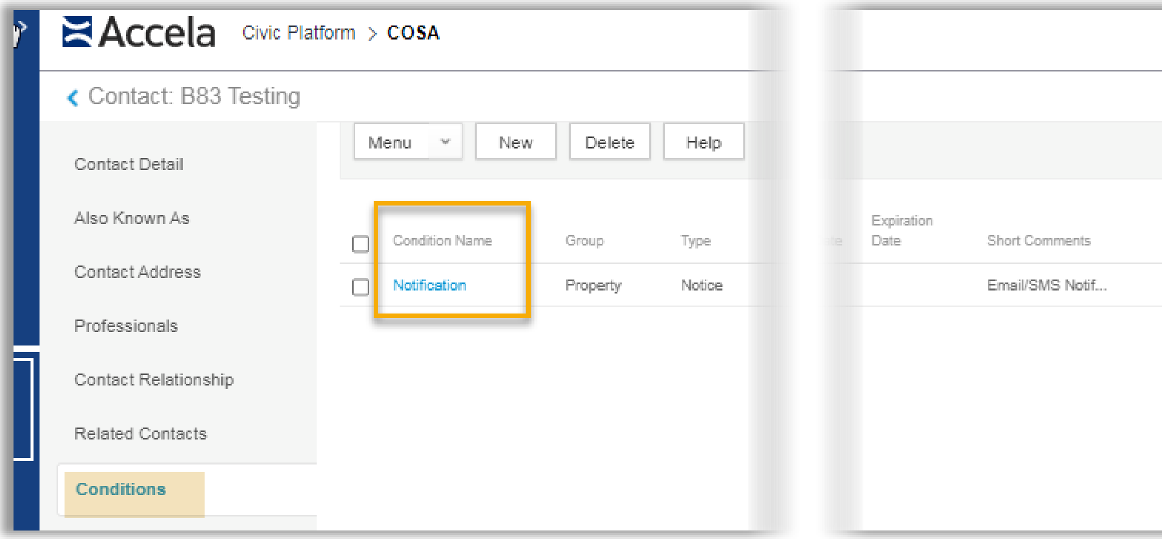
11. The Condition Type page displays. **Click** the Condition Type drop-down menu (#1). **Click** a condition to select it. Use the scroll bar to view all condition types.
12. **Click** Submit (#2).
13. Categories for the Condition Type selected display (shown). **Select** a Condition to apply to the Contact by clicking the corresponding Condition Name icon (shown).

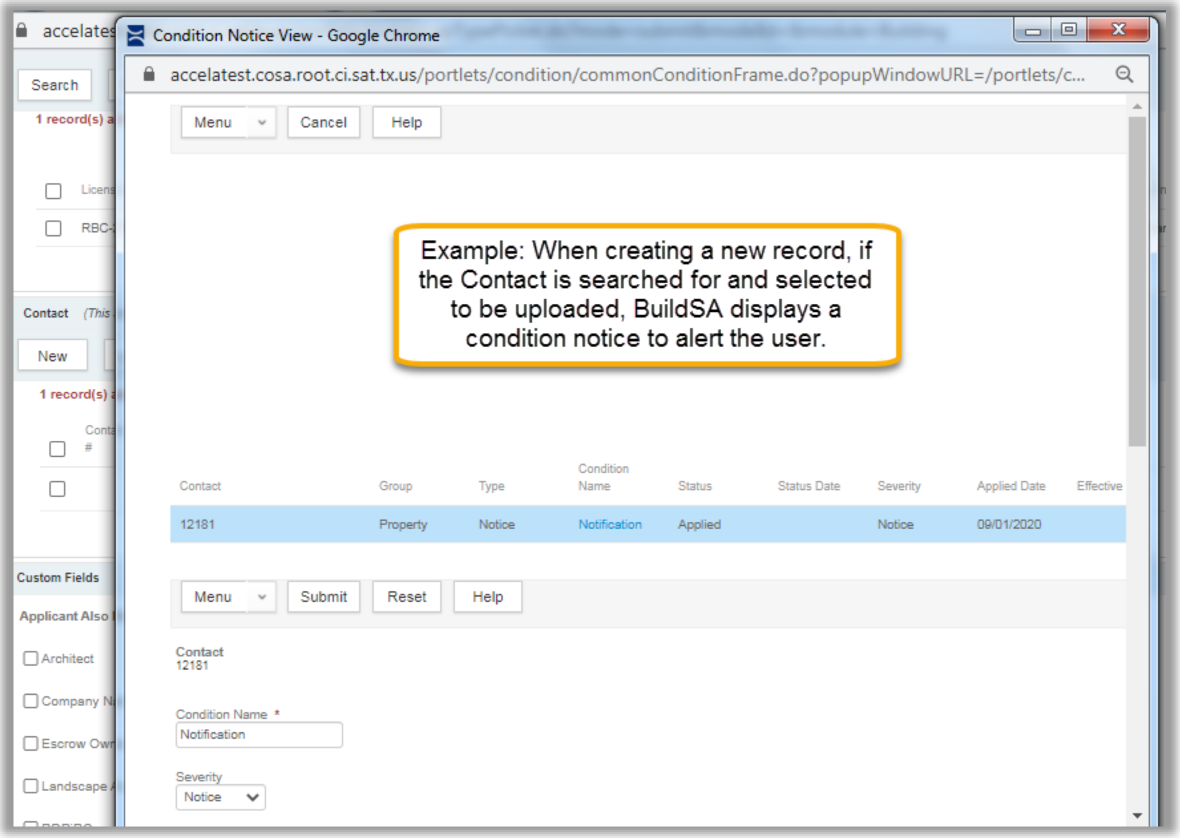


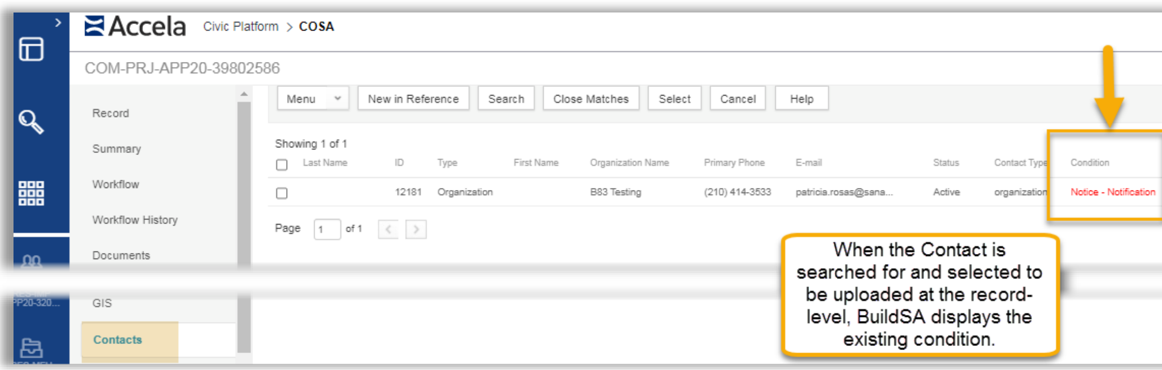
14. For this example, condition type of Notice is selected. BuildSA displays pre-configured conditions for this condition type (shown). **Select** Severity from this screen (#1). Ensure your name displays in Action By User field (#2). If working within a record and a condition is inheritable, the field will display on this page.
15. **Click** Submit (#3).

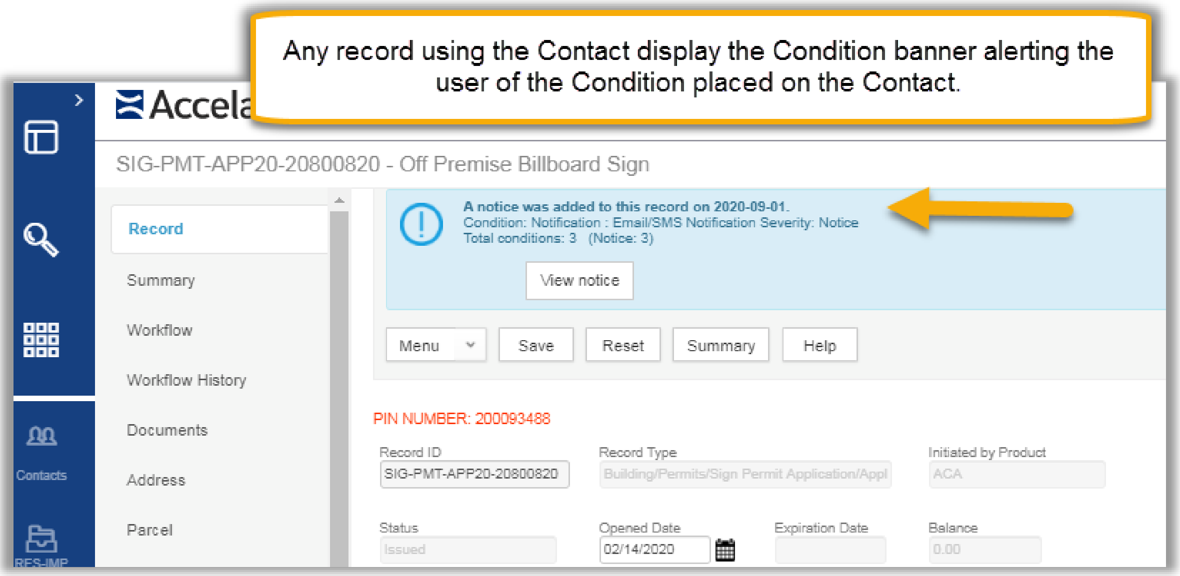


16. Condition is added to Contact. Condition displays on Condition page of the Contact (shown).

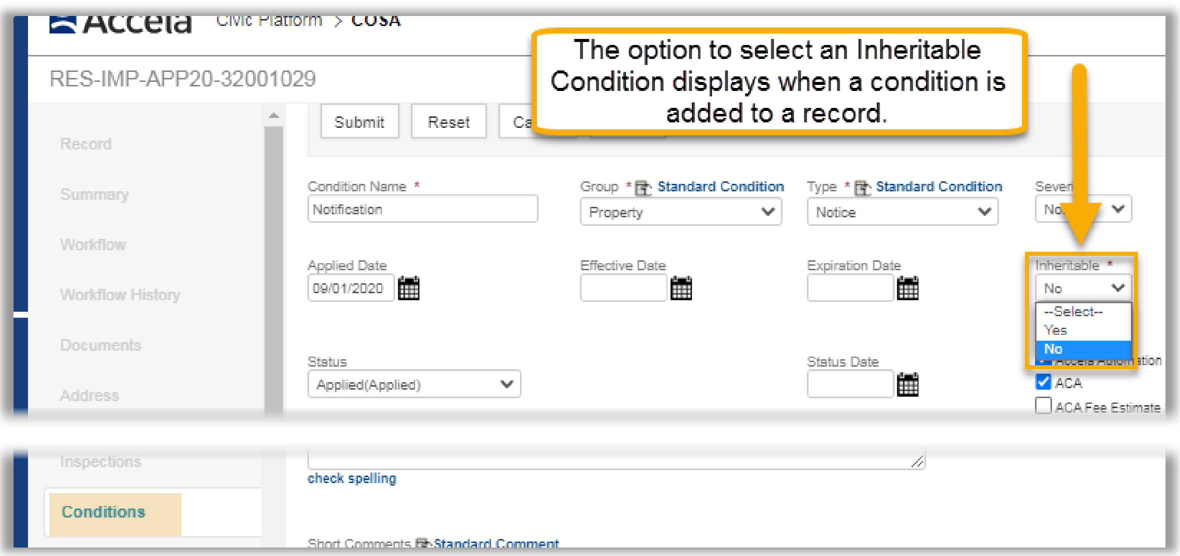



Condition Notice View - Google Chrome
accelatest.cosa.root.ci.sat.tx.us/portlets/condition/commonConditionFrame.do?popupWindowURL=/portlets/c...
Menu
Cancel
Help
Example: When creating a new record, if the Contact is searched for and selected to be uploaded, BuildSA displays a condition notice to alert the user.
Contact
Group
Type
Condition Name
Status
Status Date
Severity
Applied Date
Effective
12181
Property
Notice
Notification
Applied
Notice
09/01/2020
Menu
Submit
Reset
Help
Contact
12181
Condition Name *
Notification
Severity
Notice
Search
1 record(s)
New
Custom Fields
Architect


Accela
Civic Platform > COSA
COM-PRJ-APP20-39802586
Record
Summary
Workflow
Workflow History
Documents
GIS
Contacts
Menu
New in Reference
Search
Close Matches
Select
Cancel
Help
Showing 1 of 1
Last Name
ID
Type
First Name
Organization Name
Primary Phone
E-mail
Status
Contact Type
Condition
12181
Organization
B83 Testing
(210) 414-3533
patricia.rosas@sana...
Active
organization
Notice - Notification
Page
1
of 1
When the Contact is searched for and selected to be uploaded at the record-level, BuildSA displays the existing condition.



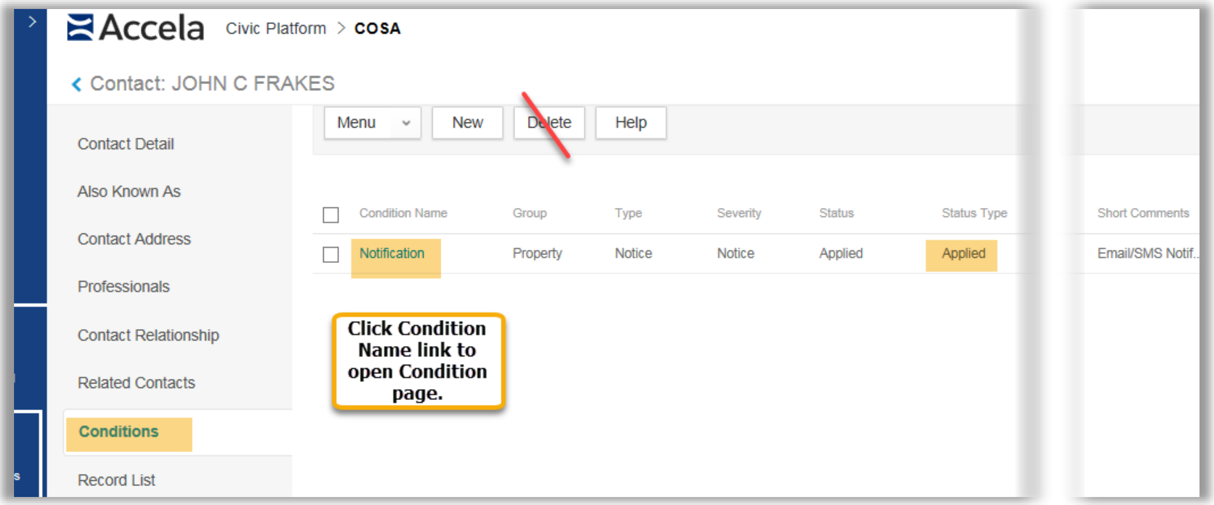
Inheritable Conditions



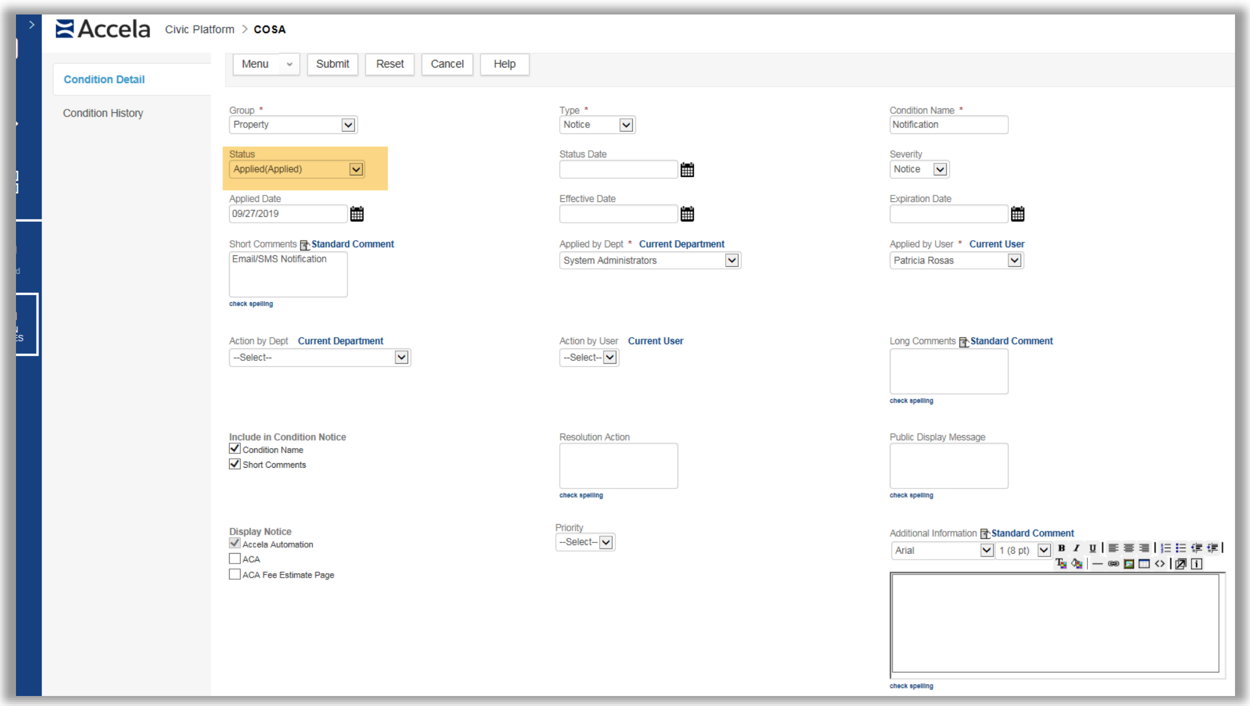
To remove a condition on a contact

A condition applied to a record, parcel, address, or contact is **never deleted**. Once created, the condition becomes part of the history of the record. Follow the steps below to mark the condition *inactive*.

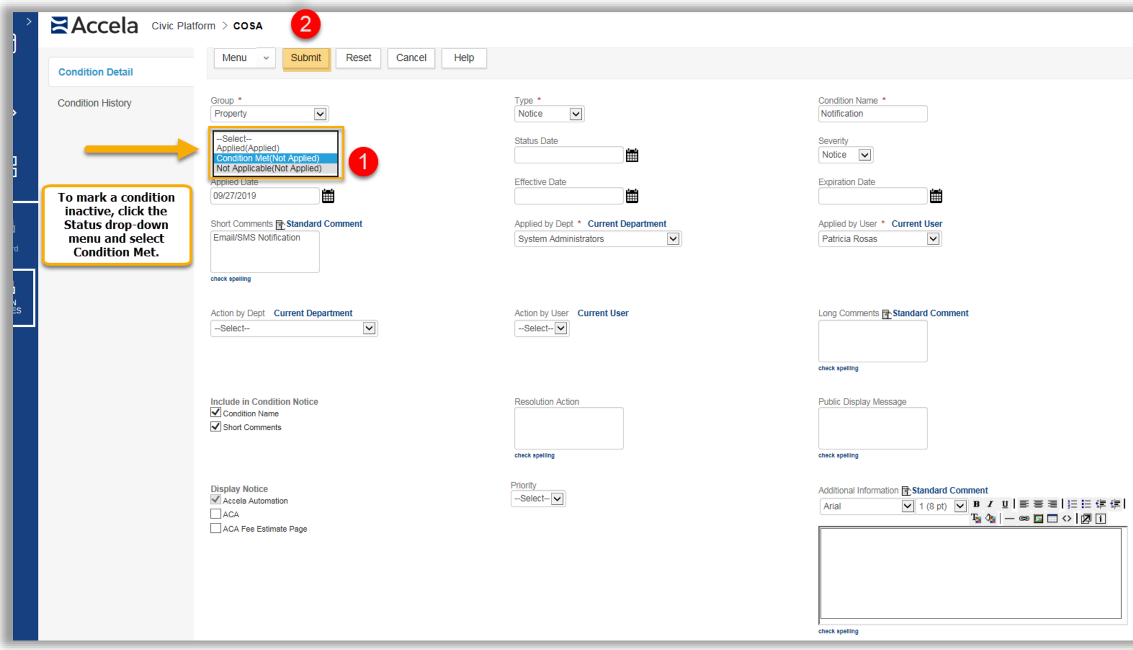
1. **Locate** the Contact (you may use Global Search or the Contacts page to search).
2. BuildSA returns the match. **Click** Record ID or Last Name link to open Contact page.
3. From the Contact record's navigation bar, **click** the Conditions Tab (shown).



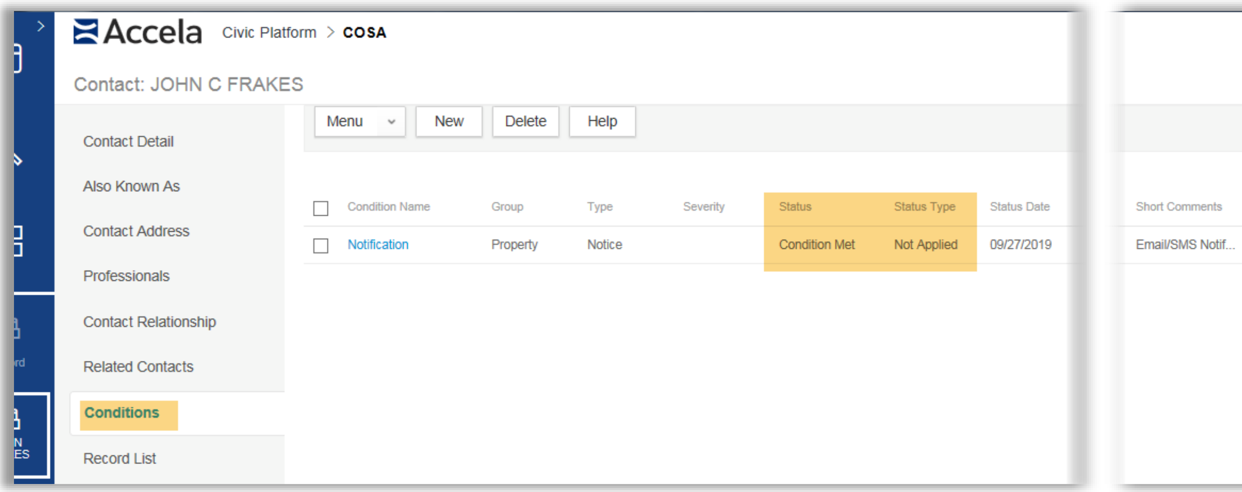
4. **Click** the Condition Name hyperlink (blue text).
5. **Click** the Status drop-down menu arrow (shown).



6. **Click** to select Condition Met (#1 shown next page).
7. **Click** Submit (#2 shown next page).



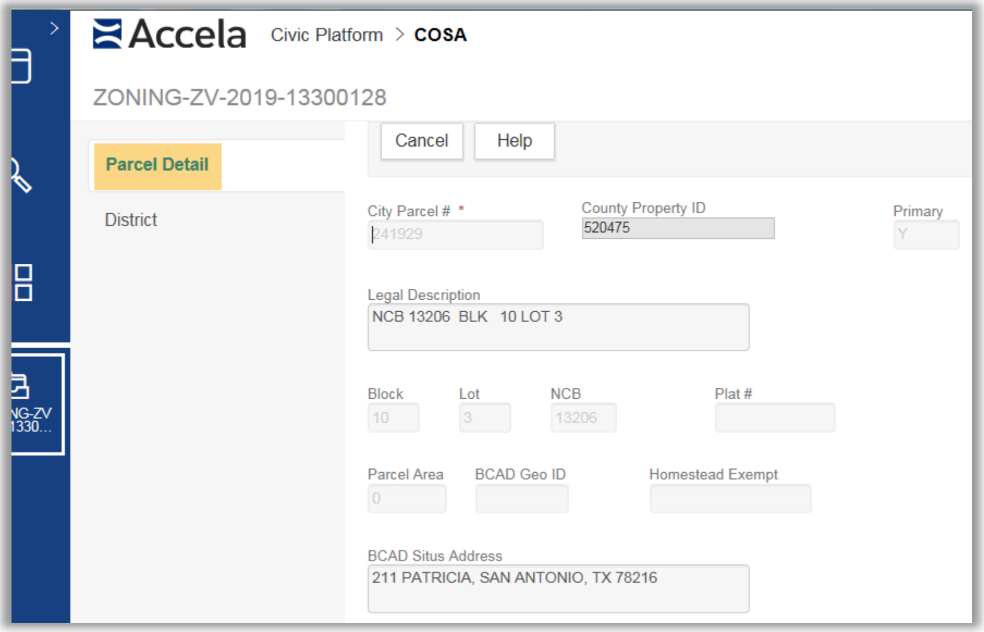
8. Notice the condition status is now Condition Met/Not Applied (shown).



9. All records on which the contact was listed, no longer carry the condition.

Parcels

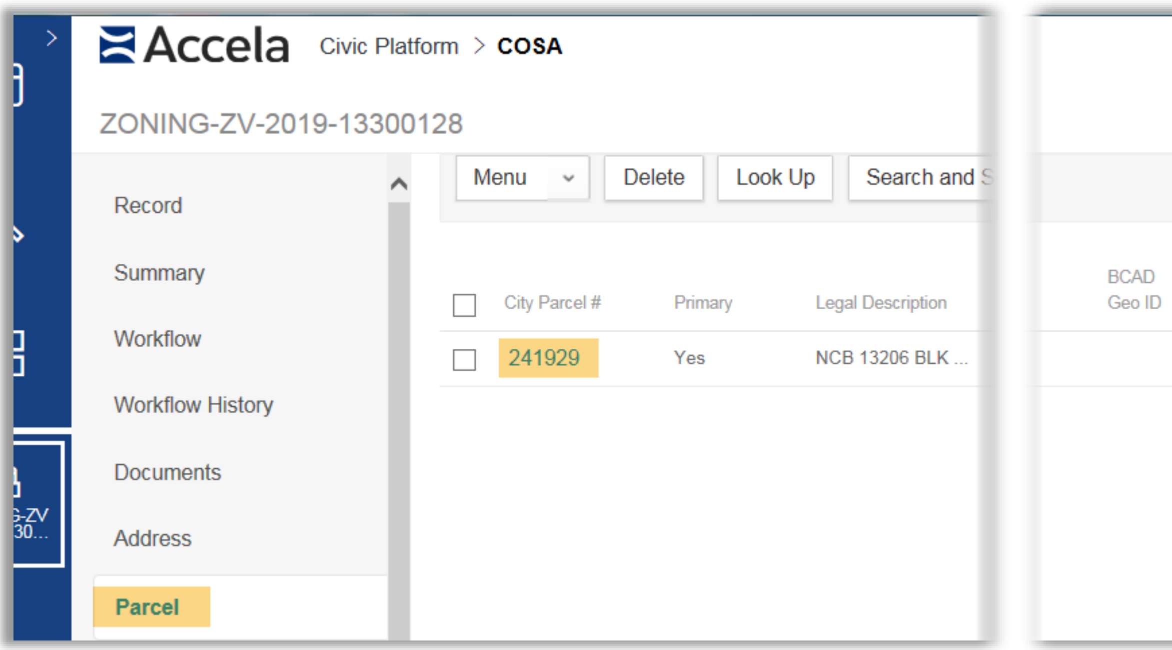
Information used in the Parcels section of the record is collected from the Geographic Information System (GIS) database. It is **not** possible to edit the Parcel section of the transactional record (shown). Updating of the Parcel information is completed within the GIS database and downloaded to BuildSA.



To view Parcel information

End-users may also use Global Search to find Parcel Information. Simply type the Parcel number in the search field and click Search.

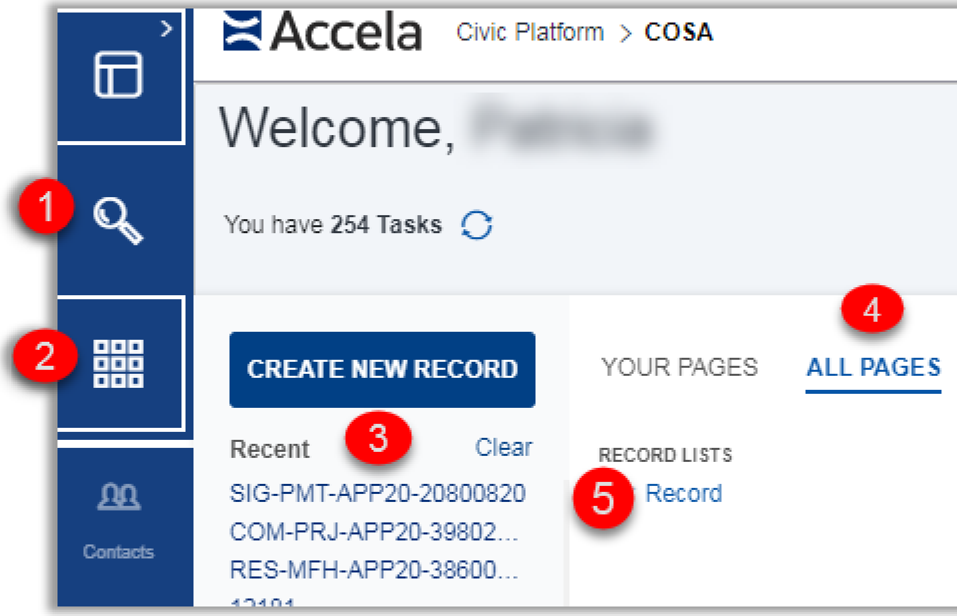
1. From the Record's navigation bar, **click** on the Parcel Tab.
2. **Click** on the *Parcel #* hyperlink located in the City Parcel # column (shown). The Parcel Detail page displays. Information on the page is uploaded from GIS and is read-only.



Searching for Records

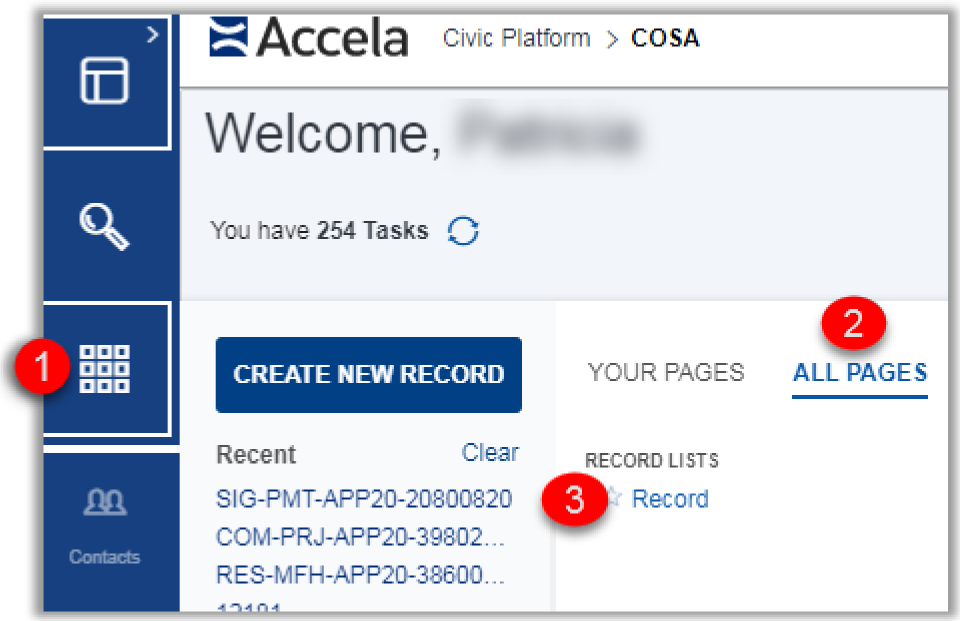
Use one of the methods below to locate a Record:

1. Global Search (#1).
2. Return to a recently viewed record with the *Launchpad Recent Records* list (#2 and 3).
3. Use *All Pages/Record* (#4 and #5).

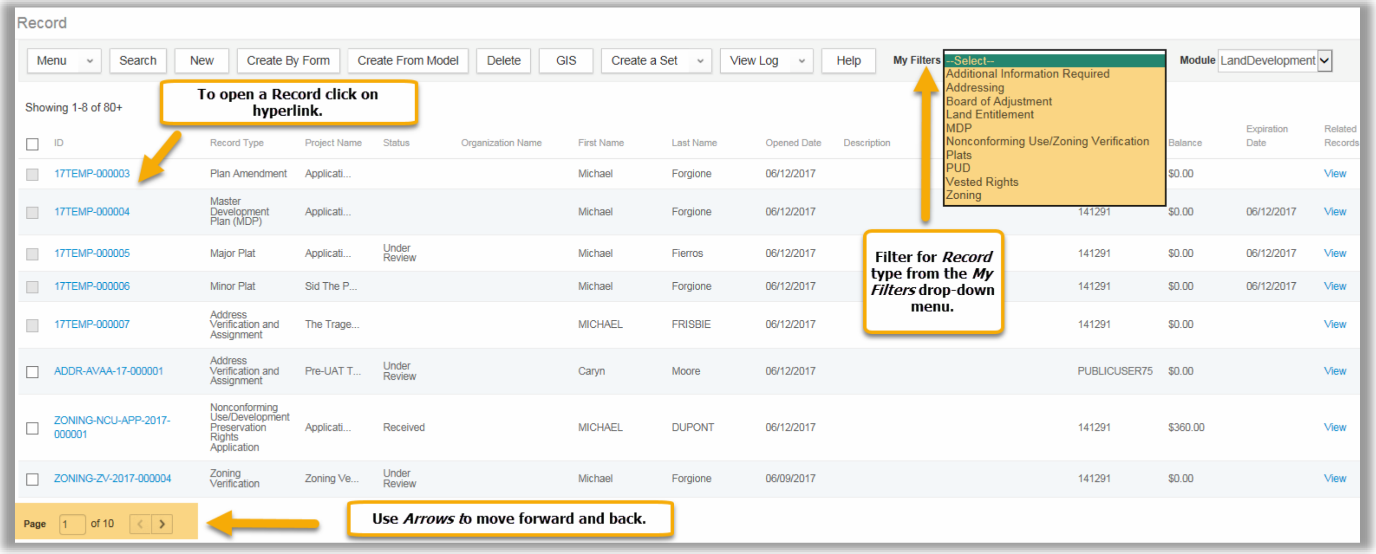


Using All Pages>Record

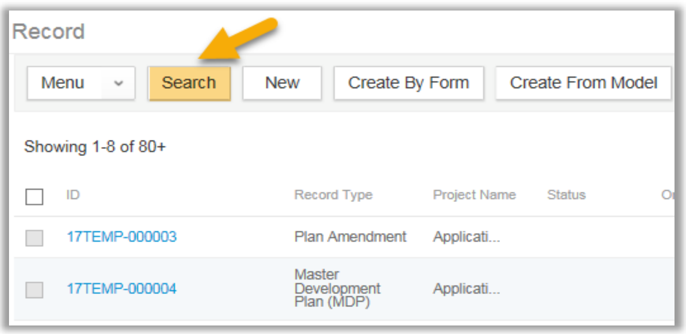
1. From the Launchpad (#1) **select** *All Pages* (#2). Filter for Record (#3).



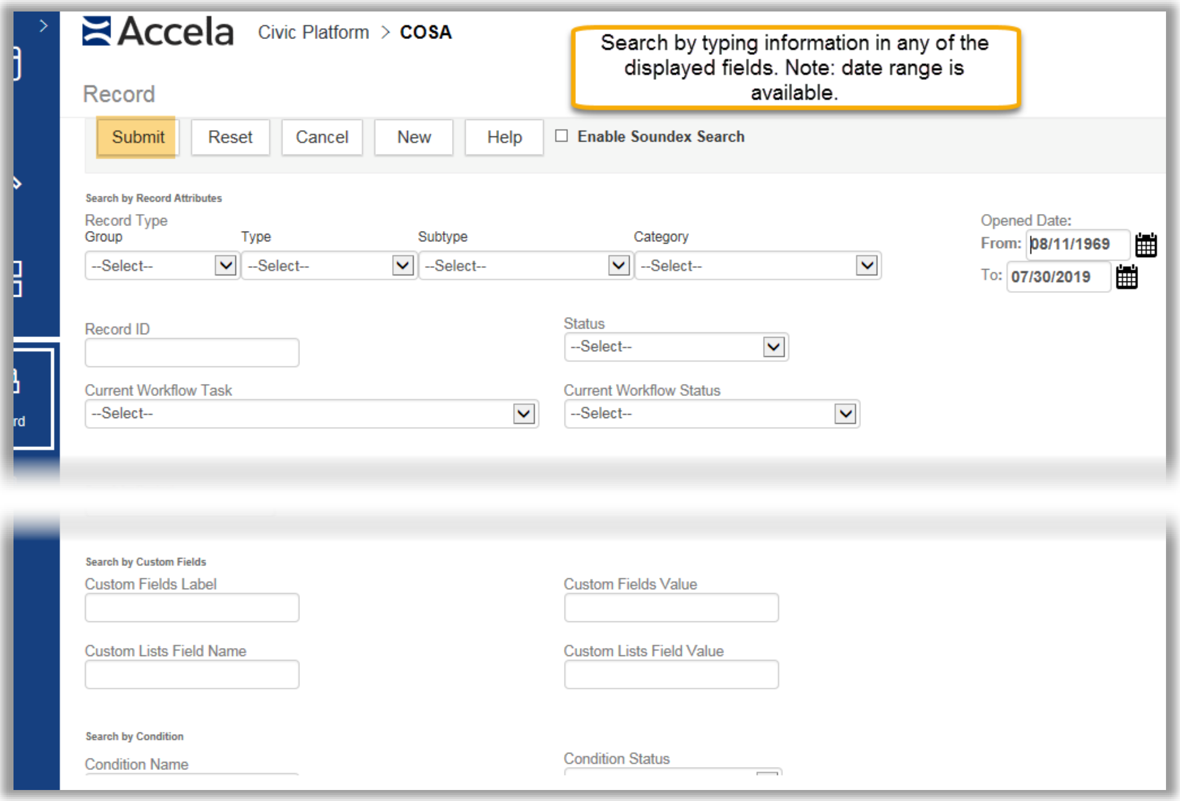
2. **Click** the *Record* hyperlink to access the Record Search page (shown).
3. The *Record Search* page displays. You may select a filter for your search using the My Filters drop-down menu (shown).



4. If you still do not find the record. **Click** the *Search* button located at the top of the page.

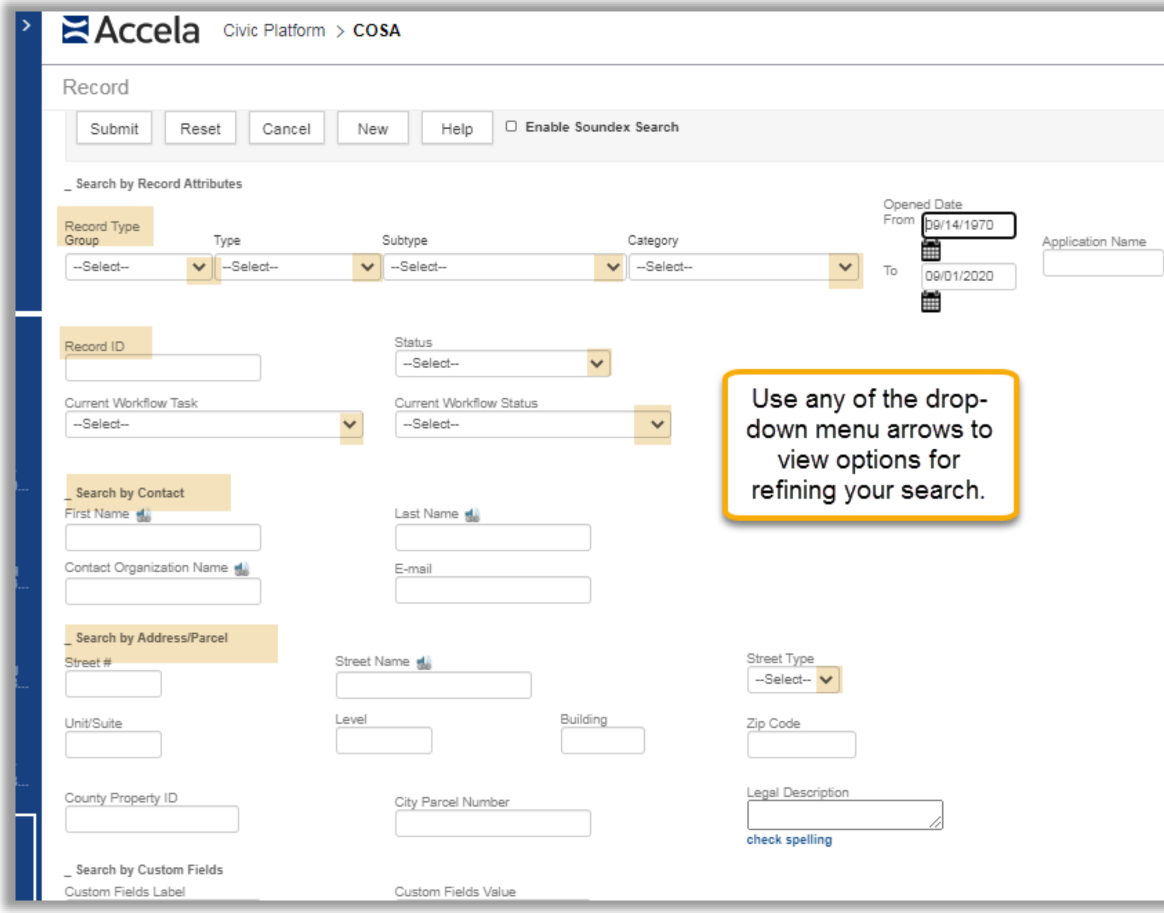


5. A *Record Search* page displays (shown).



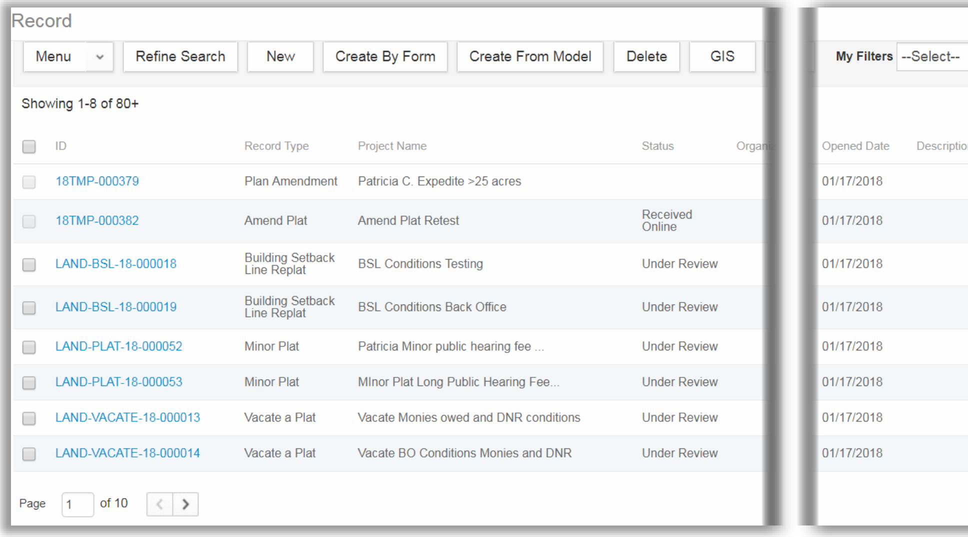
6. **Complete** fields, with information you may have. Use any of the drop-down menu arrows to view options for refining your search.

- Some options for refining your search include:
    - Date range
    - Record Type
    - Record ID number
    - Workflow status
    - Status
    - Contact
    - Address/Parcel
    - Email
    - Custom Fields

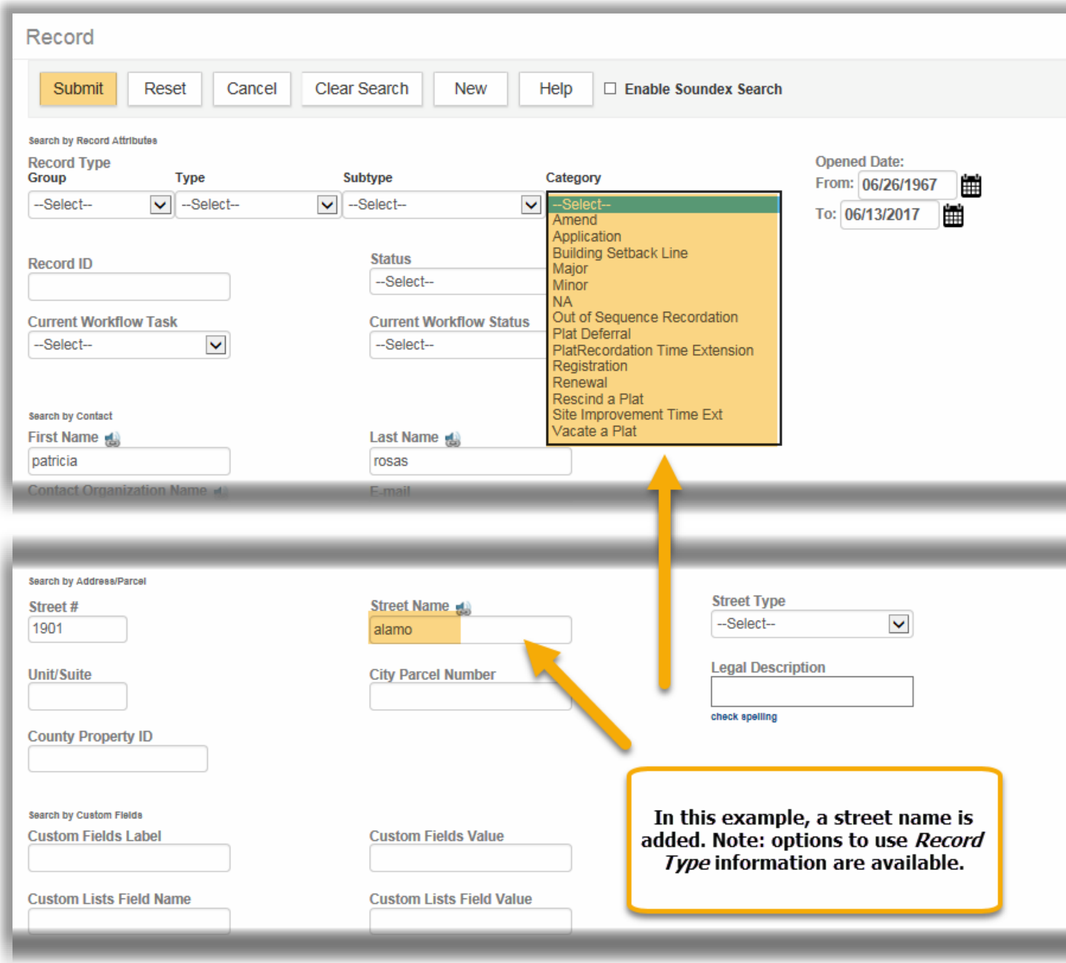


7. **Click** *Submit*.

8. BuildSA searches the database and returns matches for the search criteria (shown).

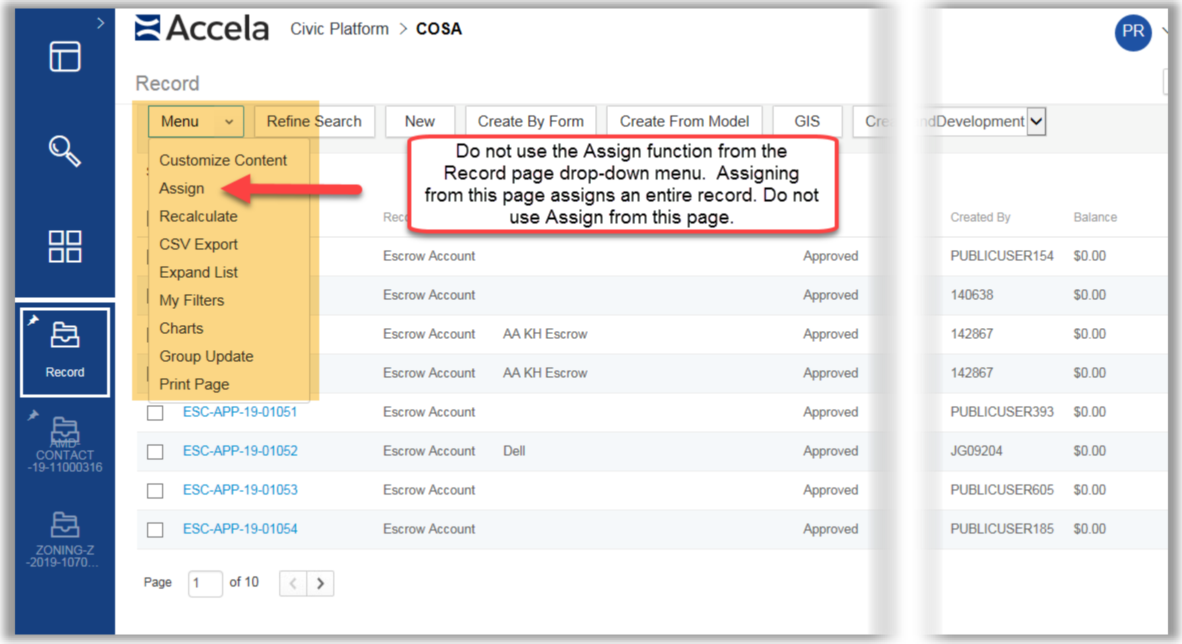


9. If the Search does not generate any matches, you need to refine the search, click **Refine Search**.
10. The *Record Search* page displays. **Add** any additional search criteria to the form (shown).



11. **Click** Submit. BuildSA displays the results of your updated search:

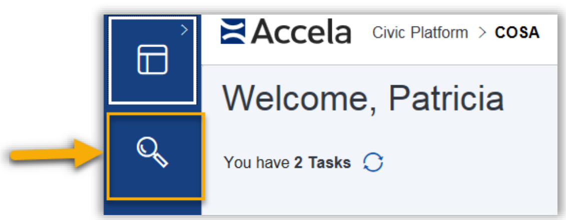
❖ ***IMPORTANT: Note the Assign option in the Record drop down menu assigns entire records— not workflow task specific.***



Performing a Global Search

Use the global search tool to find a record quickly. The Global Search is your first go-to tool for searching.

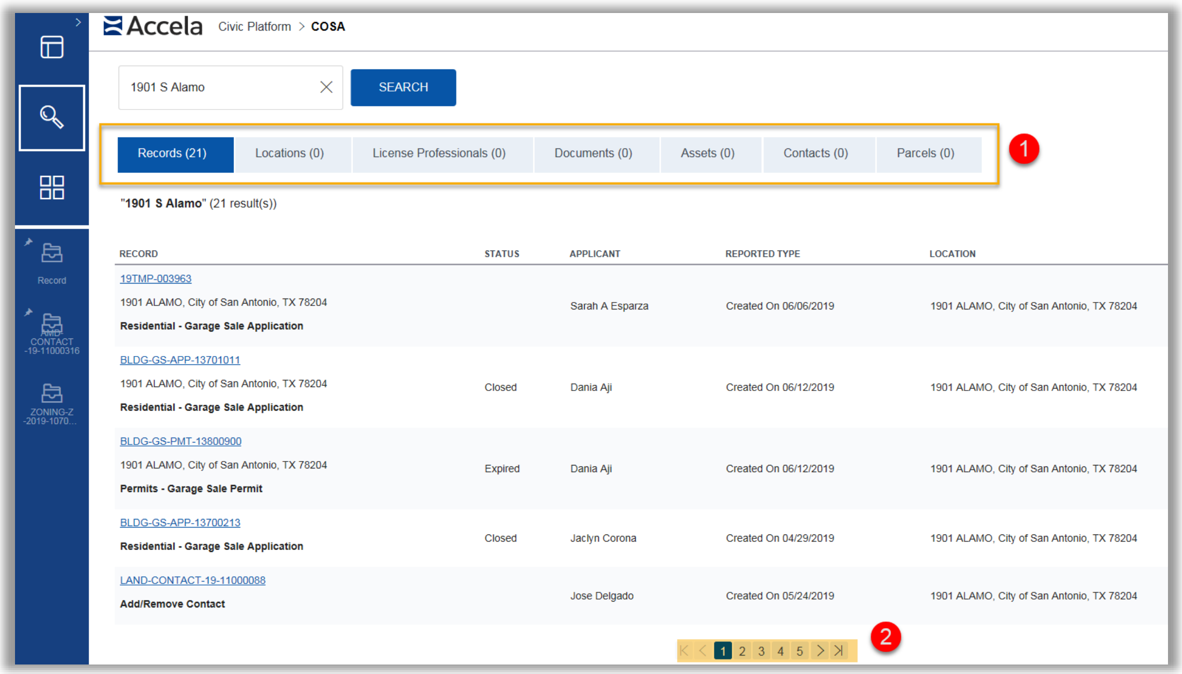
1. **Click** the Global Search button located on the console (shown).



2. A search field displays. **Type** search criteria. For example, we are looking for records related to 1901 S Alamo (address) (#2).

3. **Click** *Search* blue button (#3). BuildSA Global Search searches the reference database.

4. Any matches associated with the search data are returned in a list and are grouped by the column headings **Records/Locations/License Professionals/Documents/Assets/Contacts/Parcels type** (shown).



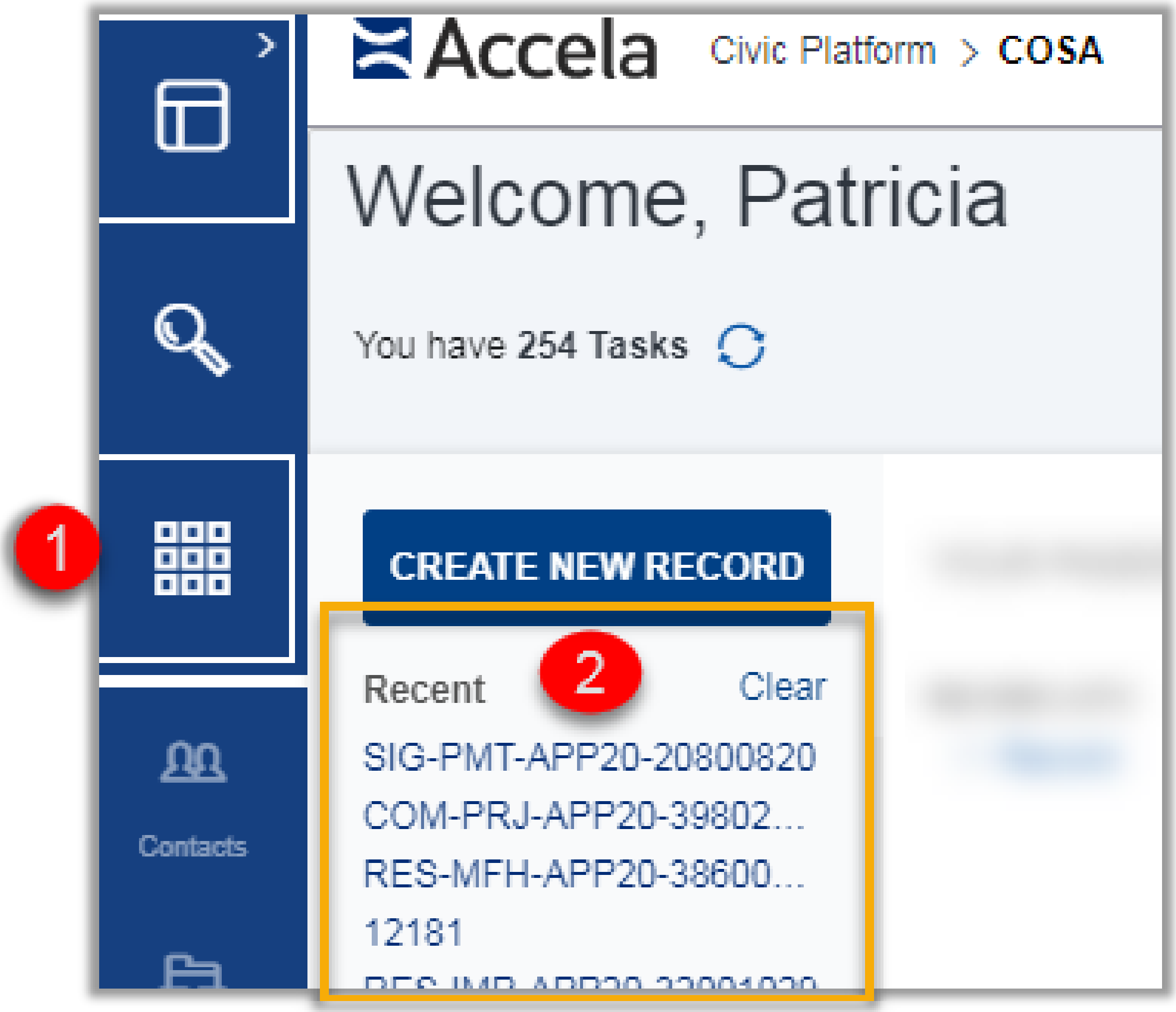
Clicking on any one of the type tabs allows user to navigate to the desired section (#1).

5. **Click** on hyperlink to access Record. Note the page numbers located at the bottom of the page (#2). Simply click on a page number to advance.

Launchpad Recent Records List

The Launchpad provides a list of recently visited records. Each record displays in the order of when they were last accessed, most recent first. To return to a recently viewed record:

1. **Click** the *Launchpad* button (#1 shown).
2. **Click** to select a record under the Recent records header (#2).

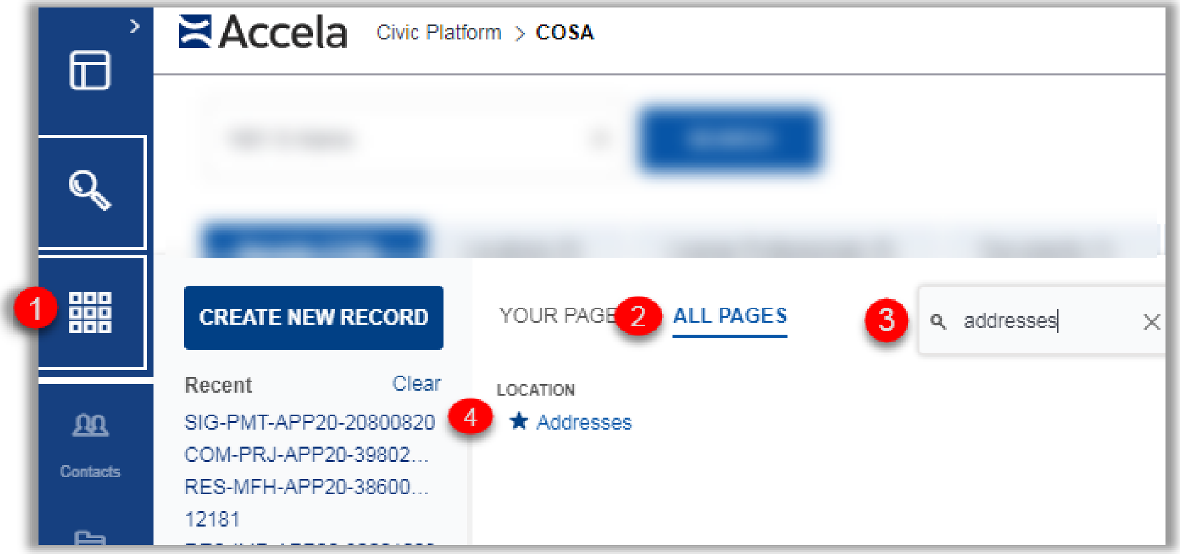


Addresses, Parcels and Owners (APOs)

Property includes all of the address, parcel and owner (APO) information associated with a record:

- ***Addresses*** are physical locations within parcels.
- ***Parcels*** are an area of land that has a specific location and legally defined boundaries. A parcel can have multiple addresses.
- ***Owners*** are associated with specific parcels-they are often responsible for their parcels and may serve as a point of contact.

When you add *reference* property information to a record, you select an existing address or parcel from a list. The reference Address, Parcel, Owner (APO) information is located in the BuildSA reference database.



Search for Contacts, Addresses, Owners or Parcels using the All Pages option.

Managing Contact Addresses

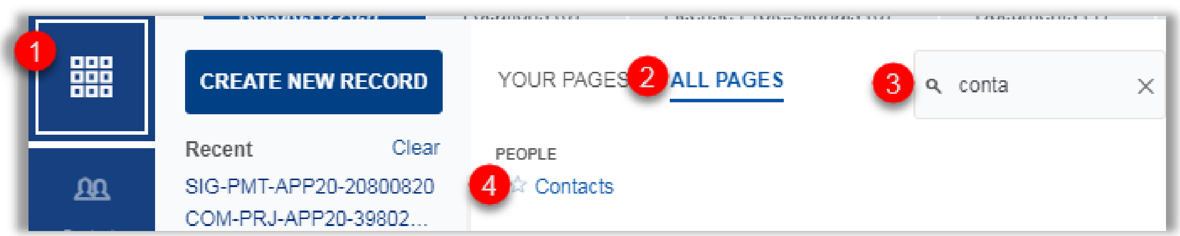
Addresses may be managed at the record level. Address information edited at the record level is synchronized with the database.

Deactivating a Contact Address in the System

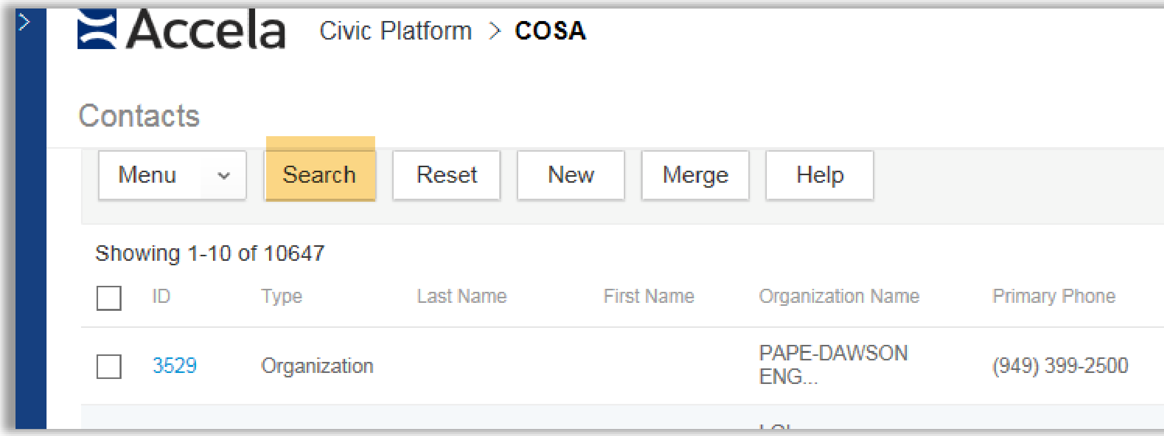
Contact addresses cannot be deleted**.** If a contact's address becomes obsolete, change its status to inactive in the system's database**.** ***Ensure you have all authorizations required for changing the Contact Address before proceeding.***

To deactivate a contact address

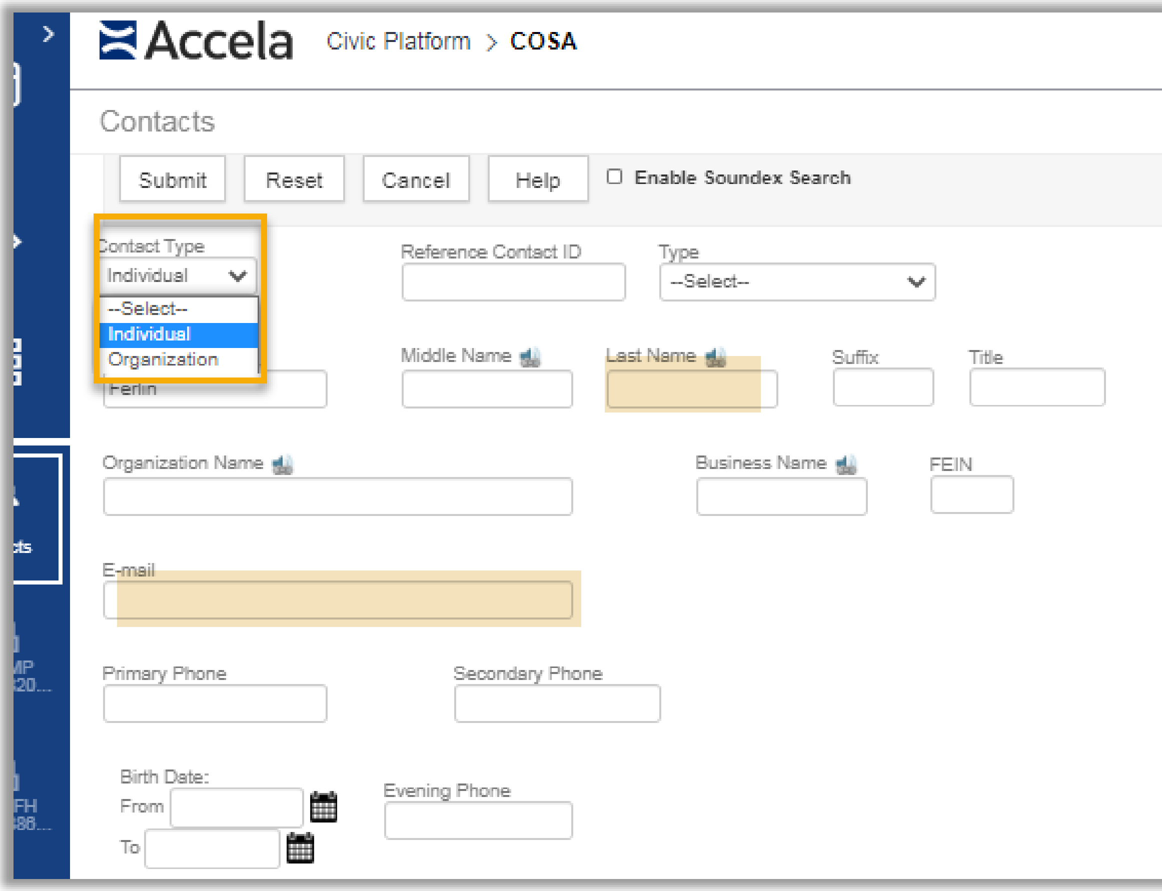
1. From the Launchpad (#1), **navigate** to All Pages (#2).
2. **Filter** for Contacts (#3*).*
3. **Click** Contacts link (#4).



4. The Contacts Search page displays. **Click** Search (shown).

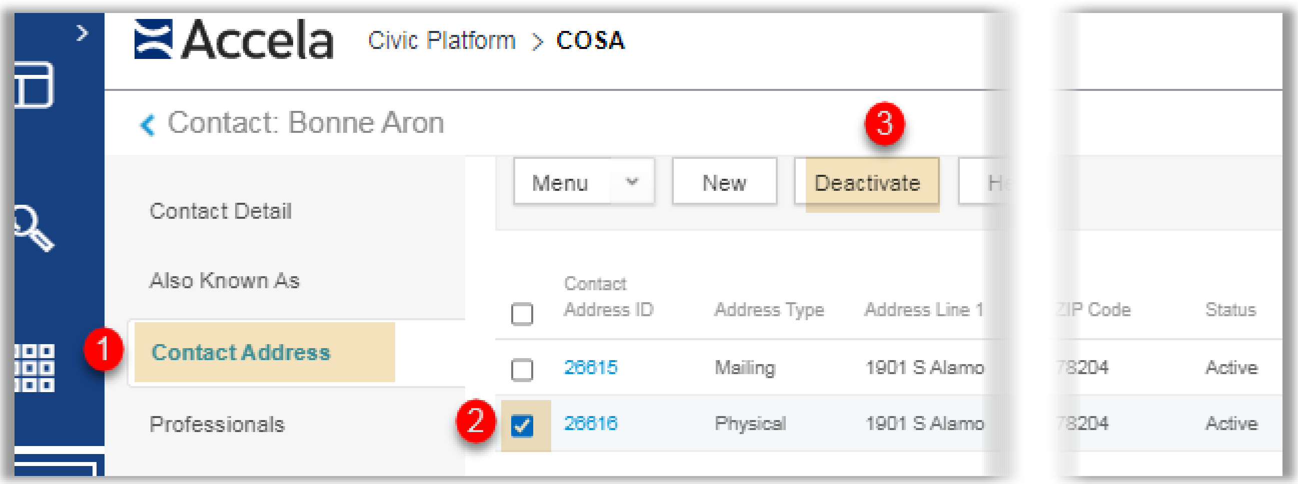


5. **Click** the Contact Type drop-down menu to select Individual or Organization (shown). Complete fields with information known (example: Last Name, email, etc.)

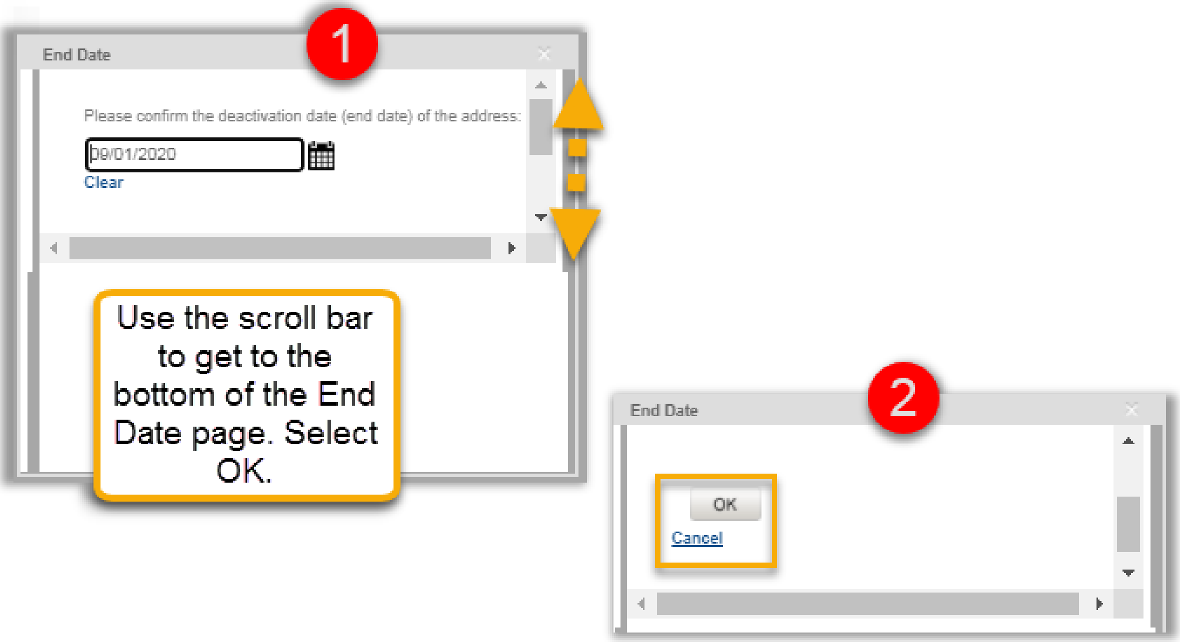


6. **Click** Submit. BuildSA returns all matches for your search. **Click** the Last Name or ID hyperlink of your selection.

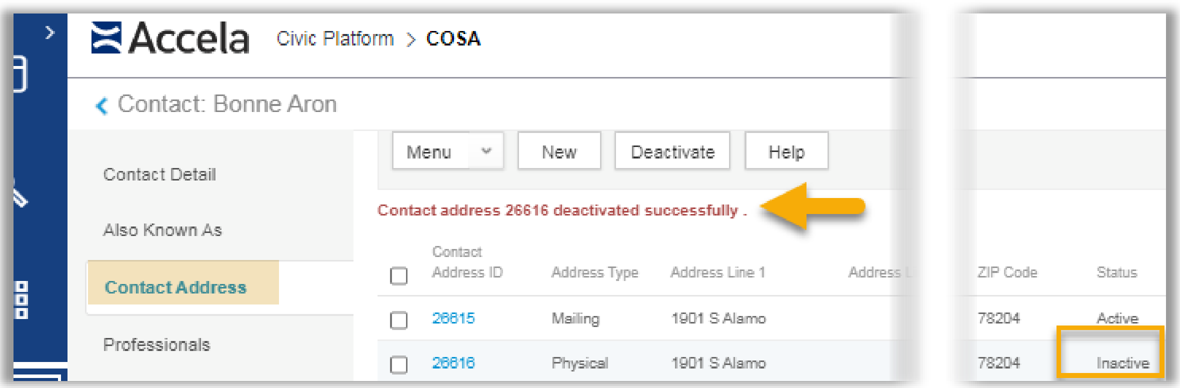
7. The Contact Details page displays (shown). **Click** the Contact Address tab (shown). **Click** the box to the left of the Contact Address ID you wish to deactivate (#2).
8. **Click** Deactivate (#3).



9. BuildSA generates an End Date box (shown).
10. **Select** the end date from the calendar icon (shown).
11. **Click** the *OK* button. Build SA deactivates the address and generates a successfully deactivated message (shown).



12. BuildSA displays the Contact Address deactivated successfully message (shown). Notice the Status column displays 'Inactive' for the address deactivated (shown).



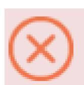
Conditions

❖ ***IMPORTANT: Owner conditions are added at the transactional record level.***

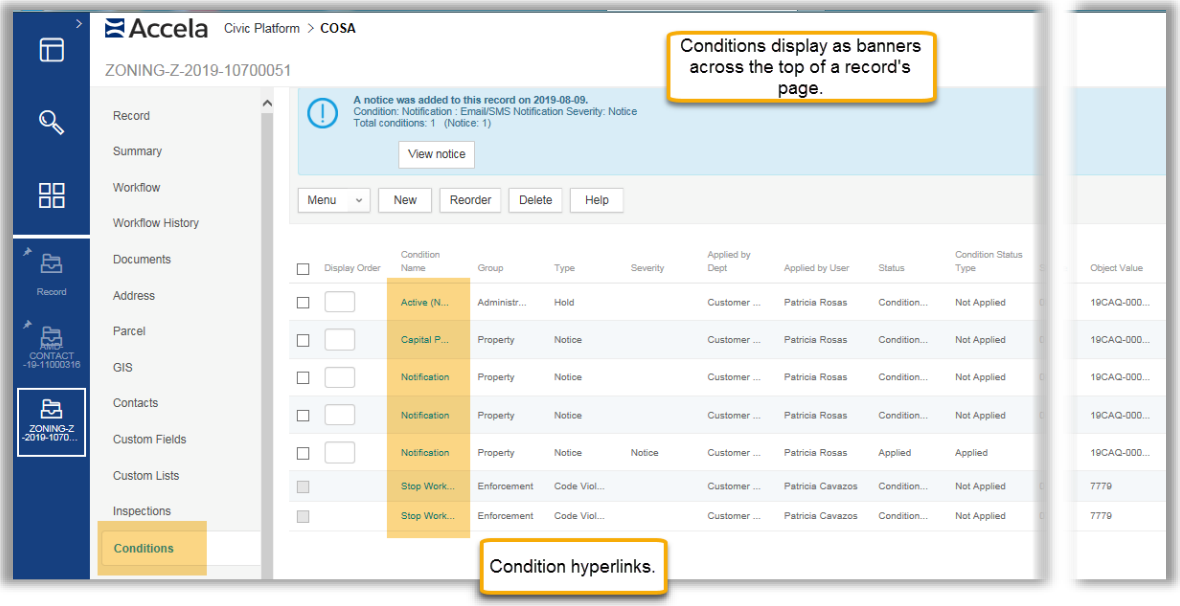
A condition is a requirement that is applied to a record that the record must fulfill to qualify for approval. Conditions may be added to records, reference data and inspections. Although conditions do not necessarily impose holds, they can prolong the workflow process until they are met. There are four levels of severity associated with Conditions: Lock, Hold, Notice and Required.

- **Lock:** Prevents you from scheduling or updating inspections; adding or editing reference objects; processing fees or cashiering; processing workflow tasks; and editing the record status, additional information, record-specific information or renewal information. Essentially, the record is locked until the condition is met. The record is viewable only.

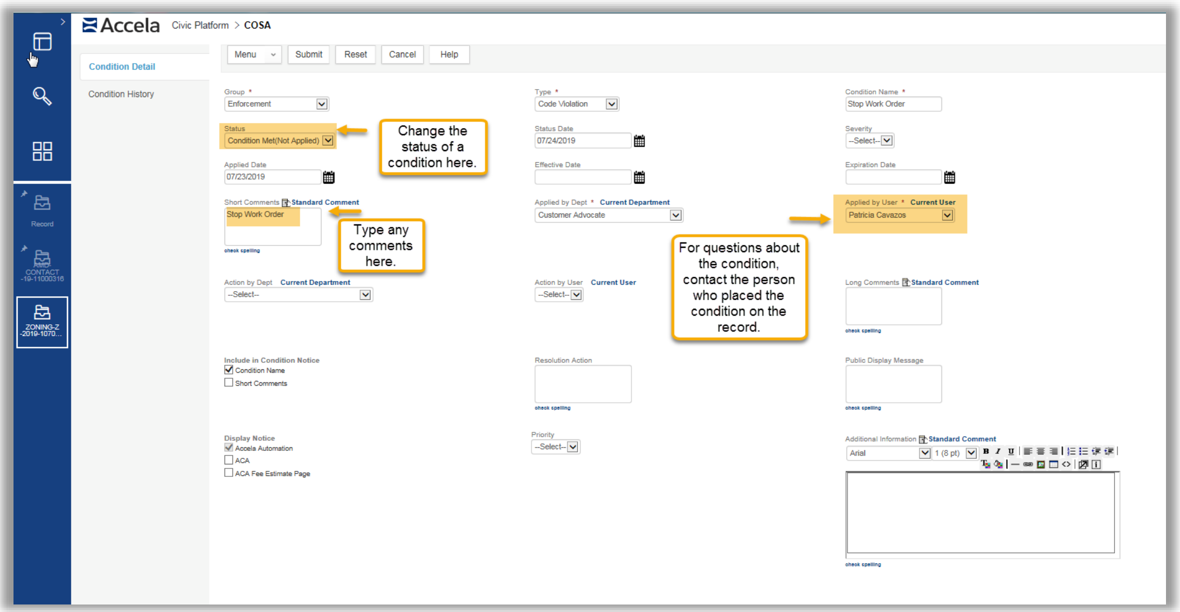
- **Hold:** Prevents you from scheduling or updating inspections, processing workflow tasks, and processing fees or cashiering.
- **Notice:** Indicates special instructions to the person completing the record. Notices do not inhibit the record process in any way.
- **Required:** Unique to workflow tasks, the required severity indicates a certain activity or field must be completed before the user can proceed to the next activity.

	Indicates a *notification for the record (special instructions) is available. Notices are purely informational.*
	Indicates a locked by requirement condition. Do not apply this condition to any record without prior supervisory approval.
	Indicates a lock condition is in place. Records are *read only*.
	Indicates a hold status is in place. Holds stop actions that would progress the record forward: payment, editing record components, adding activities. The *Custom fields* and *Record details* may still be corrected or modified.

The *Conditions* page is accessible from the Record's navigation bar and displays all conditions assigned to the Record (shown).



1. To access the Condition's detail page, locate the condition and click the Condition hyperlink. After clicking the hyperlink, the *Condition Detail* page displays (shown).

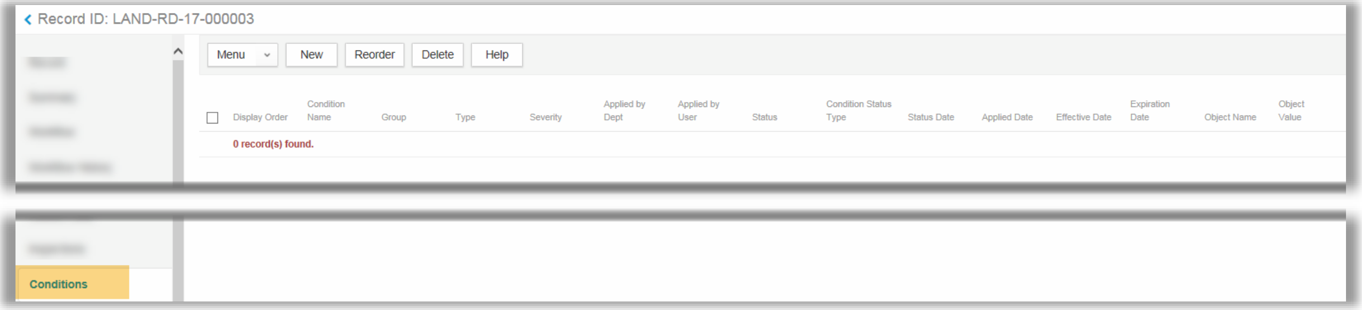


Adding a Condition to a Record

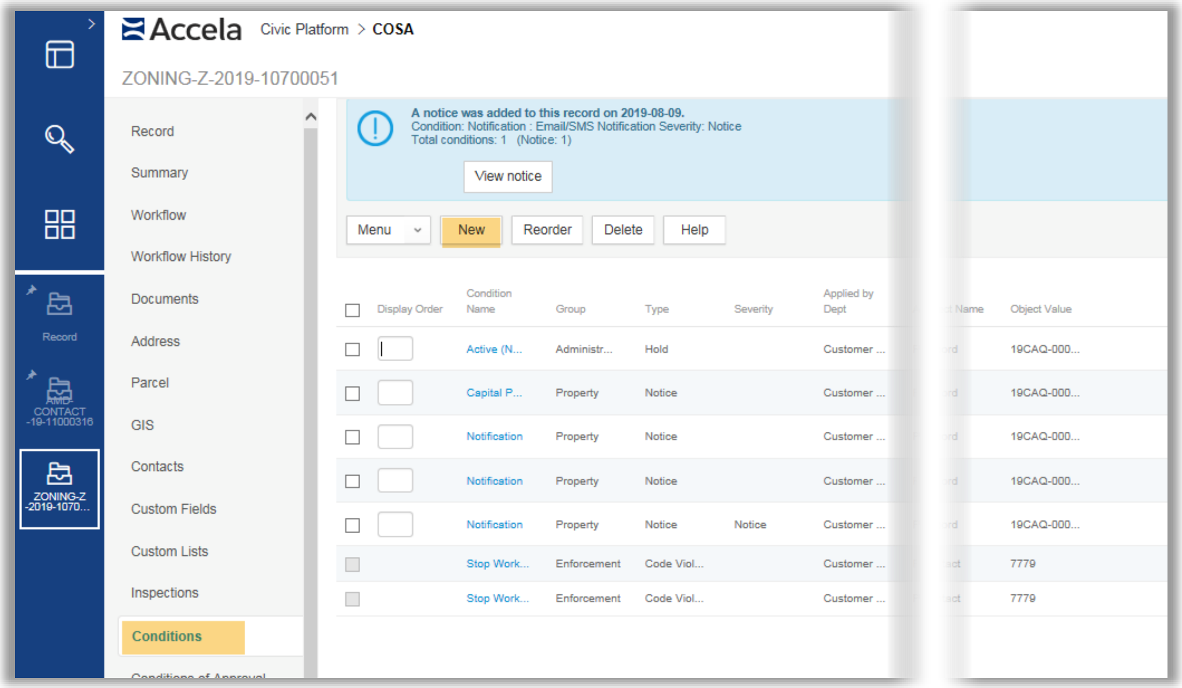
The steps below walk you through the process of adding a Condition to a Record.

❖ ***NOTE: Only one condition can be selected at a time. More than one condition may be applied.***

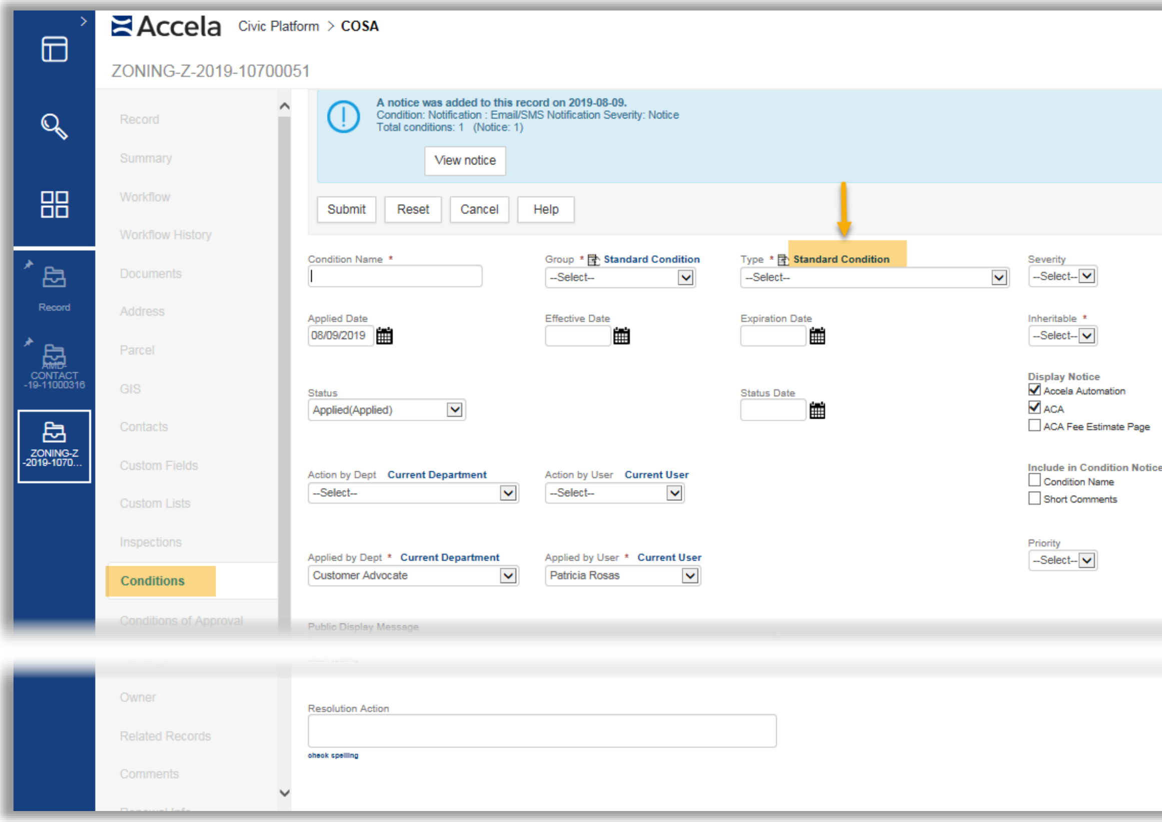
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the *Conditions* tab (shown).



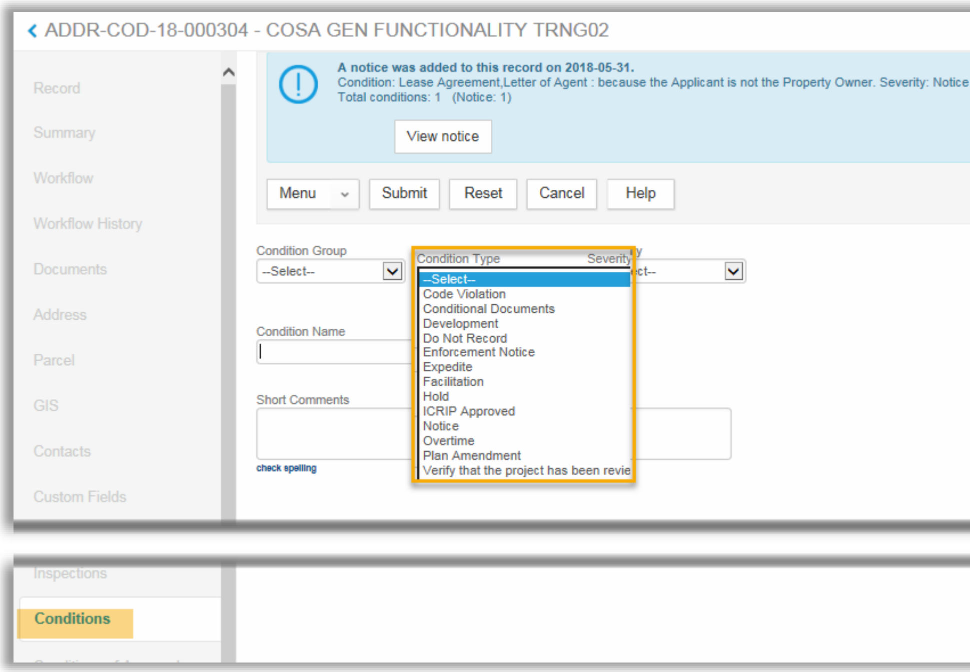
3. **Click** the *New* button (shown).



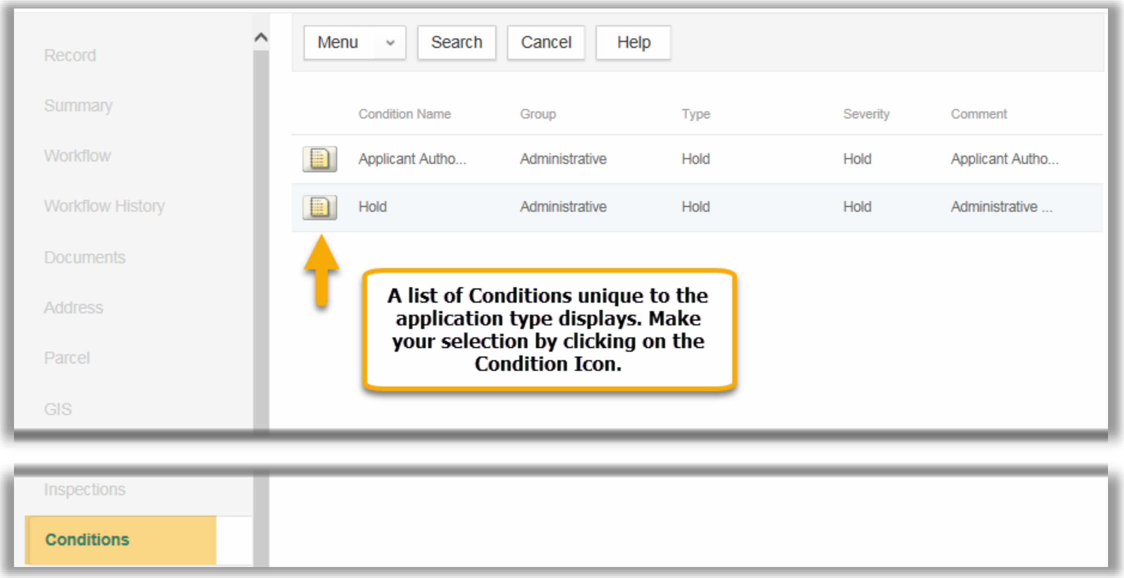
4. **Click** the Type hyperlink for *Standard Condition*. **Ensure that you make your selection through use of the Standard Condition hyperlink. The conditions listed are pre-configured for DSD workflows.** Not selecting a condition using the Standard Condition hyperlink may impact the workflow process of the record!



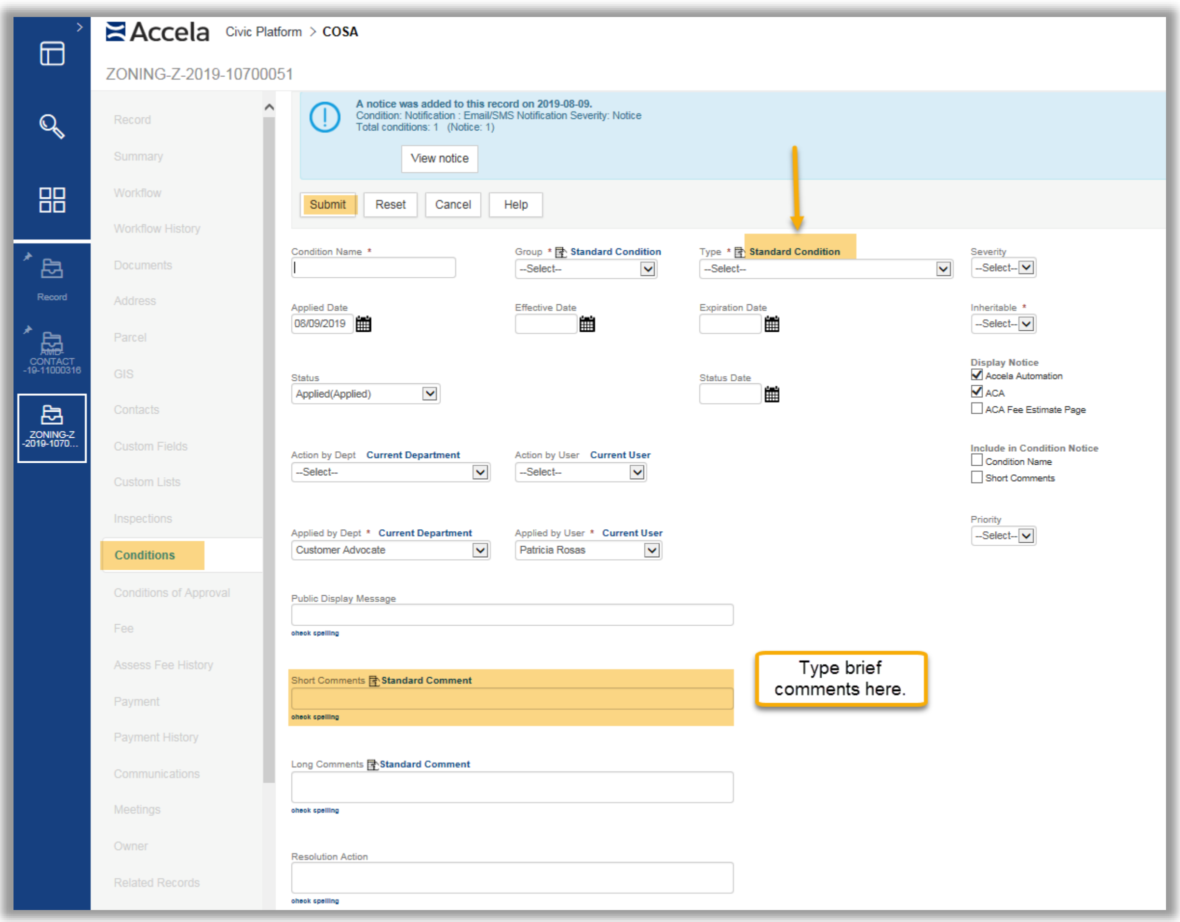
5. **Click** the *Condition Type* drop-down arrow to display Conditions menu (shown). **Select** the Conditio Type from this page!



6. **Click** *Submit.* BuildSA displays a list of Conditions that are **unique** (that is, pre-configured) to the application type and to your selection (shown).

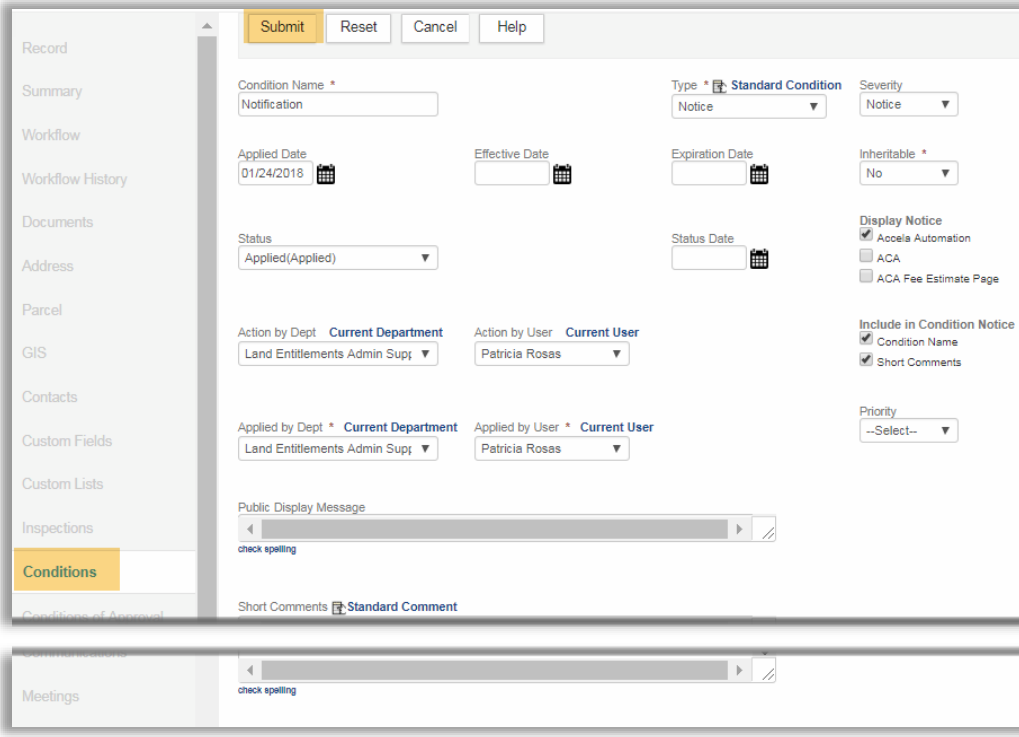


7. Make your selection by clicking on the Conditions icon  . In this example, we've selected the Hold Condition (shown). BuildSA displays the Hold Condition intake form (shown).
8. The Inheritable field is a required field. If YES is selected, any child record(s) created inherit the condition. This option is available at the transactional record level.

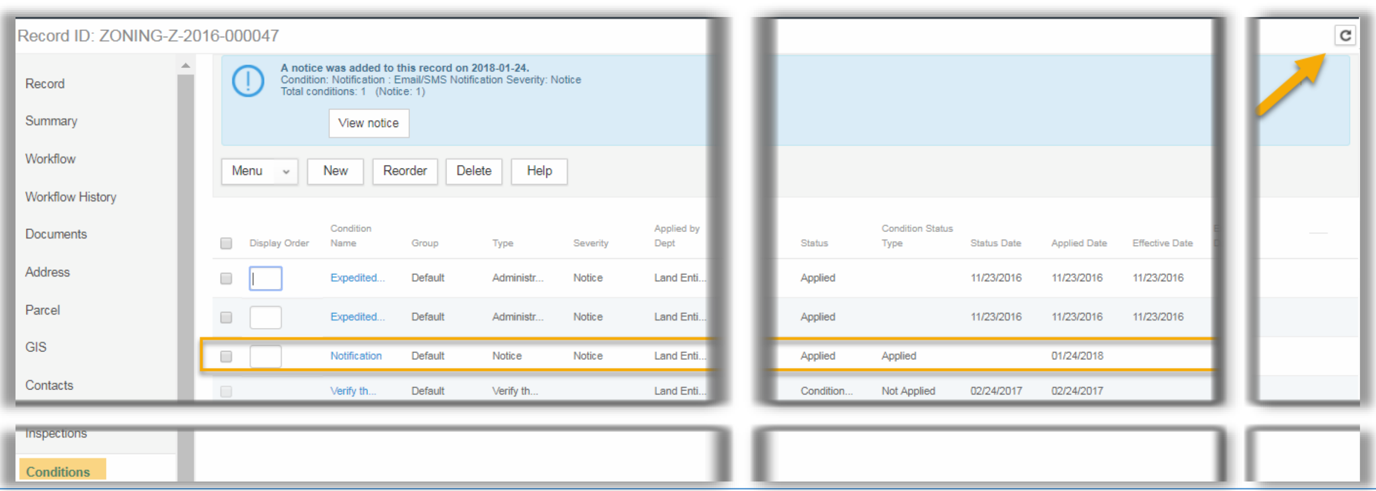


9. End-users may manually type a comment for the condition.
10. Ensure that the *Current Department* and *Current User* are set to **your** credentials. Use the *Current Department* and *Current User* hyperlinks to locate your role and name as appropriate. You may also double-click on the *Current User hyperlink* to find your credentials.

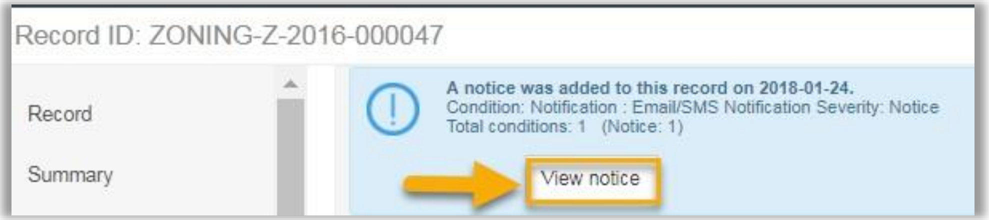
11. **Complete** required fields (shown).
12. **Verify** populated fields (shown).
13. **Click** *Submit* (shown).

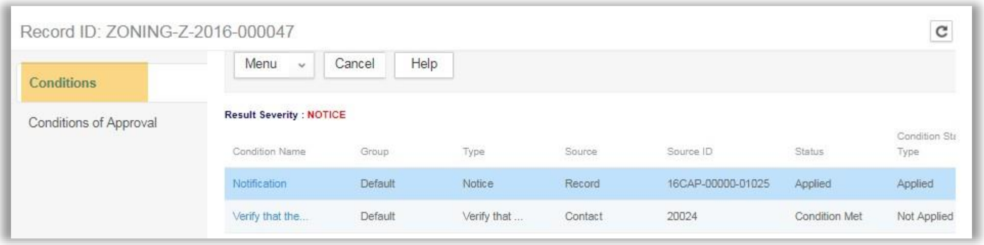


14. **Click** Refresh (shown).



15. The Condition is now added to the Record (shown).
    - ❖ ***NOTE: Clicking on the View notice button takes you to the Conditions detail page (shown)***.

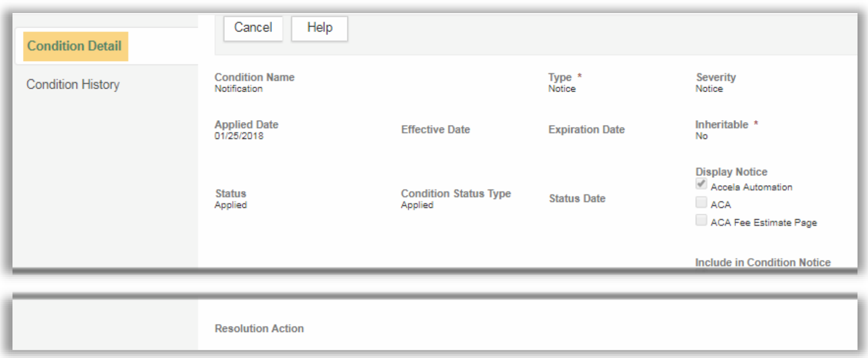




Making a Condition Inactive

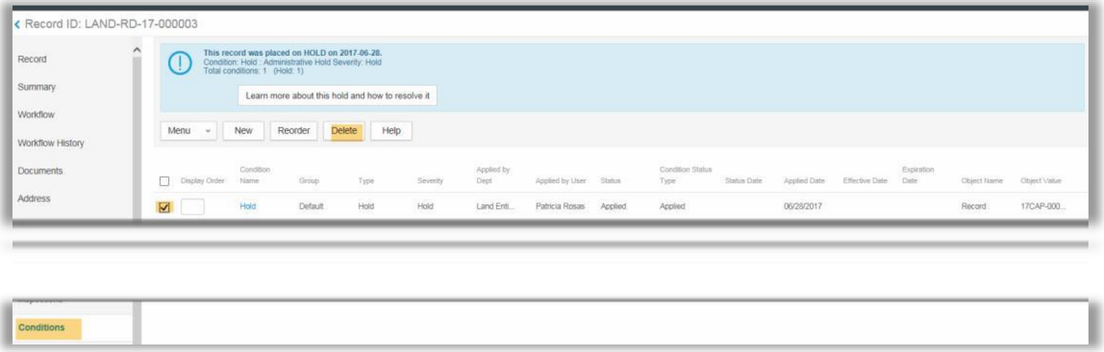
❖ ***IMPORTANT: Conditions become Inactive and stay part of the history of the record—they are never deleted.***

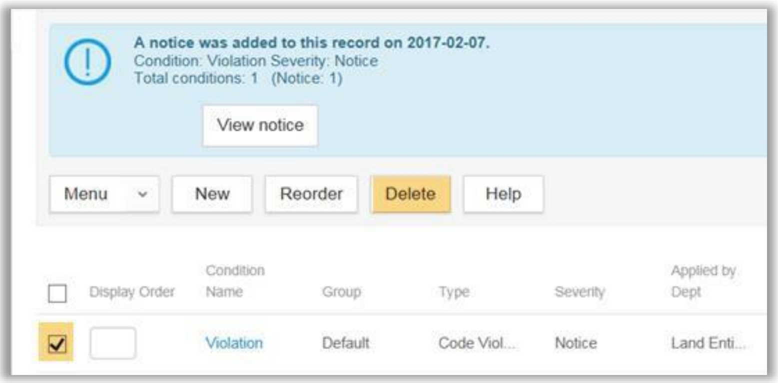
Conditions cannot be deleted from a record, the condition becomes inactive and remains on the condition list. View inactive conditions by clicking on the Condition Name hyperlink. Note that the Detail page of the Condition is read-only (shown).



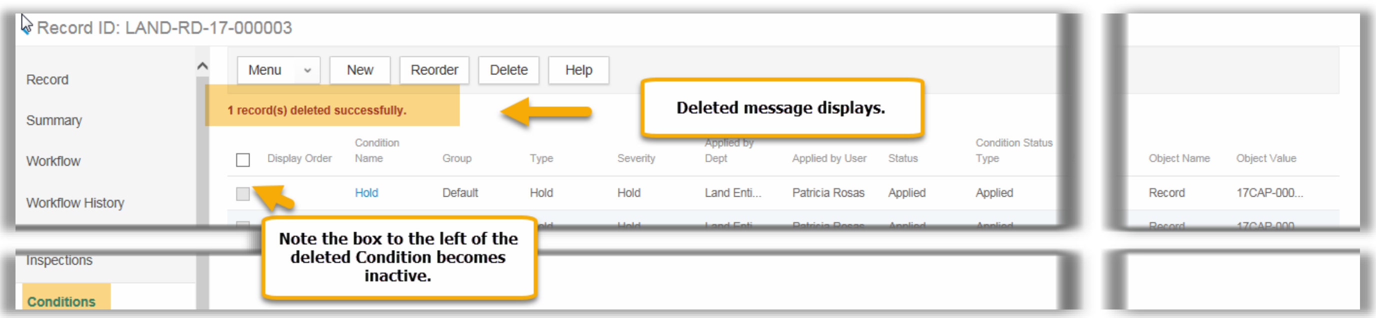
To make a condition inactive

1. **Use** *Global Search* or *All Pages-Record* search to locate and retrieve the record.
2. From the record's navigation bar, **click** the <u>Conditions</u> <u>Tab</u> (shown).
3. **Check** the box to the far left of the condition you want to delete [that is, marked inactive] (shown).
4. **Click** *Delete*. Reminder: Conditions become **Inactive** when deleted and remain part of the history of the record.

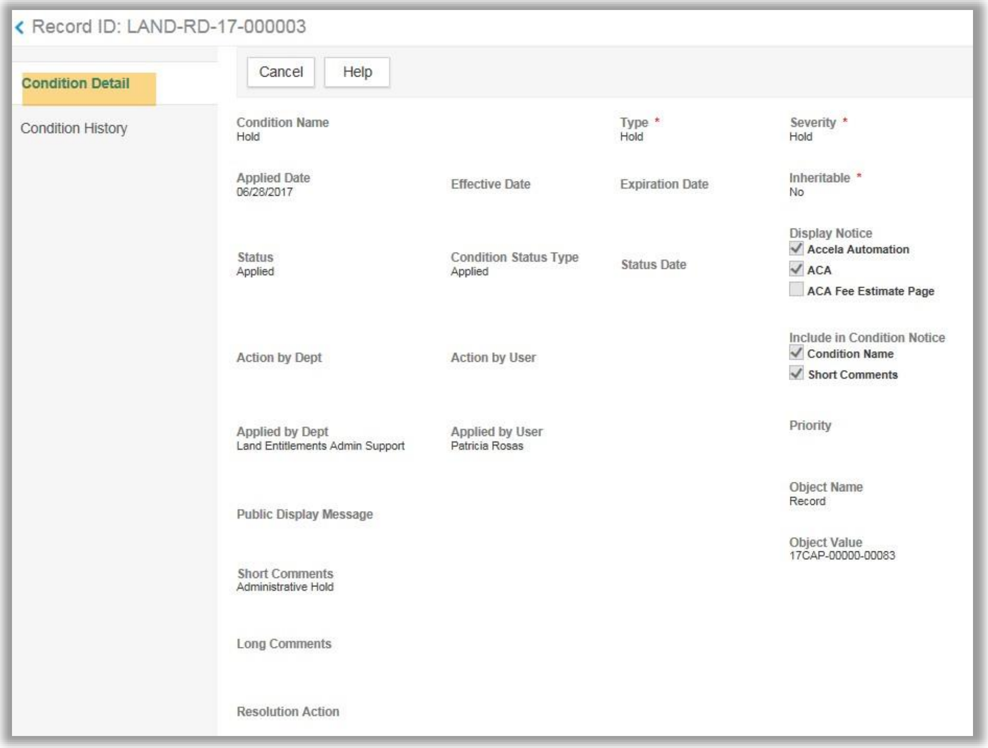




5. BuildSA displays a 1 record(s) deleted successfully message (shown). The conditions becomes inactive but remains part of the history of the record.

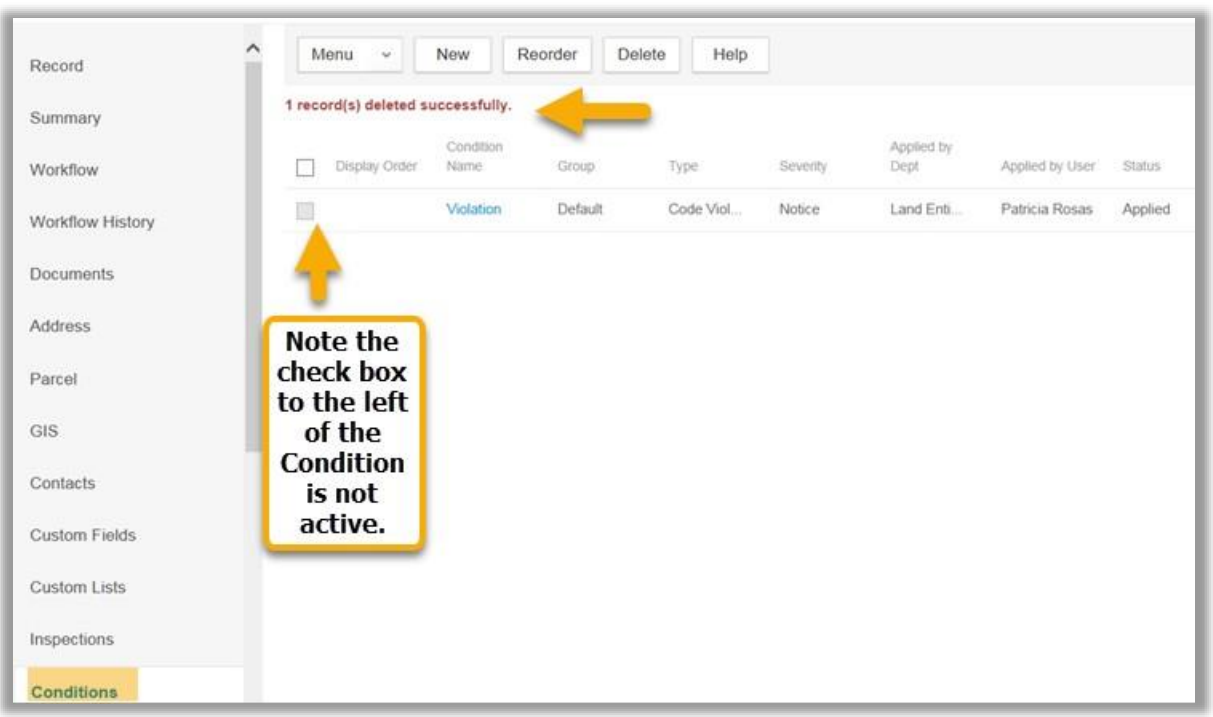


6. If you click on the Condition Name hyperlink, the Condition Detail page displays (shown). Note that editing is not possible on an inactive condition. The page displays as read-only.



7. **Click** the *Condition History* tab to display the Action of the Condition, the name of the Condition and the user responsible for Actions on the Condition (shown).

Once deleted, marked inactive, the condition remains visible on the conditions list, but is now inactive (note the grayed out box to the left of the condition). The original status and severity do not change on the line item, but the banner updates to show only those active conditions on the record. You can still



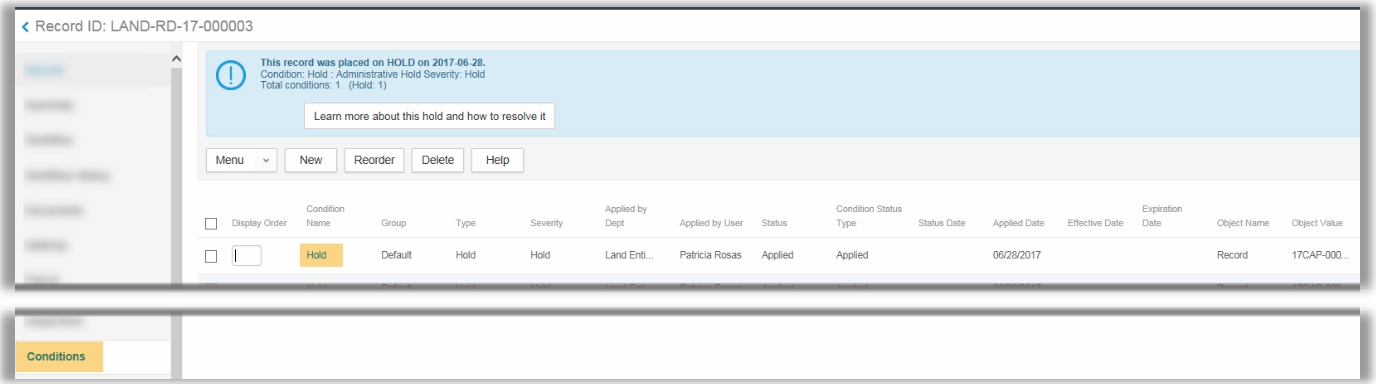
view the details and the history of the inactive conditions.

8. Click on the Condition Name hyperlink to view condition's details.

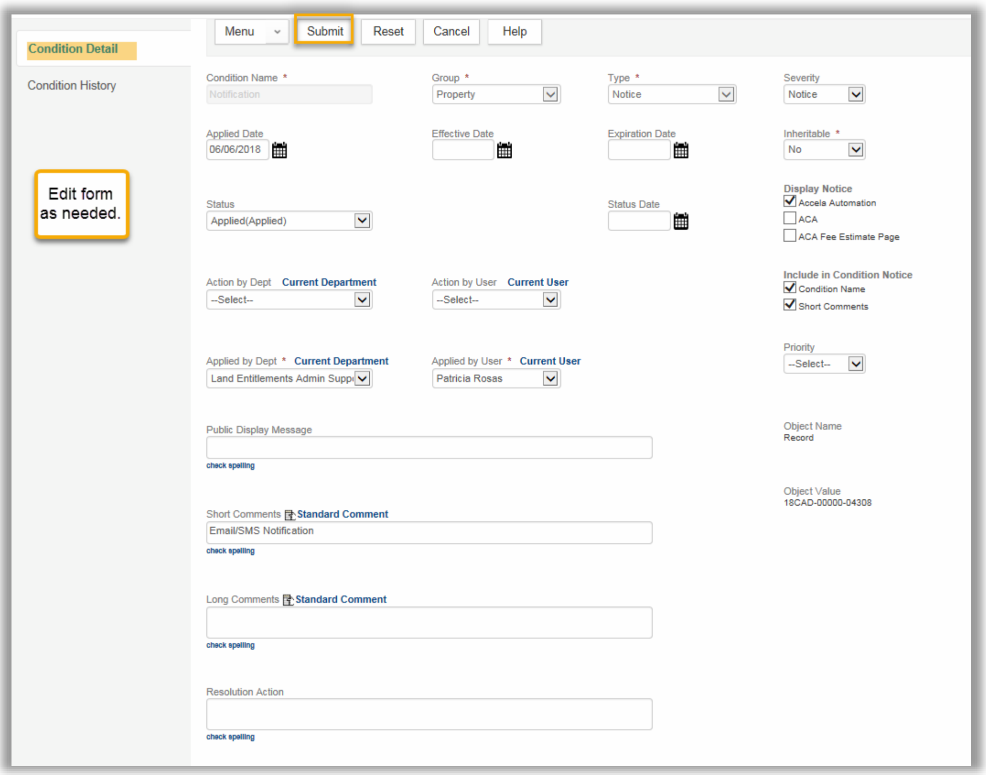
Editing an Existing Condition

To edit existing conditions, follow the steps below.

1. **Use** *Global Search* or *All Pages-Record* search to locate and retrieve the record.
2. From the record's navigation bar, **click** the Conditions Tab.
3. **Click** the *Condition Name* hyperlink (shown).



4. The Condition detail page displays (shown).

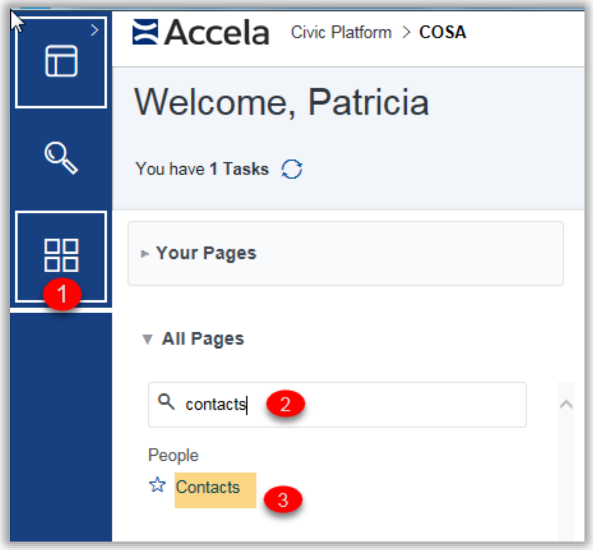


5. **Edit** fields, as applicable.
6. **Click** *Submit*.

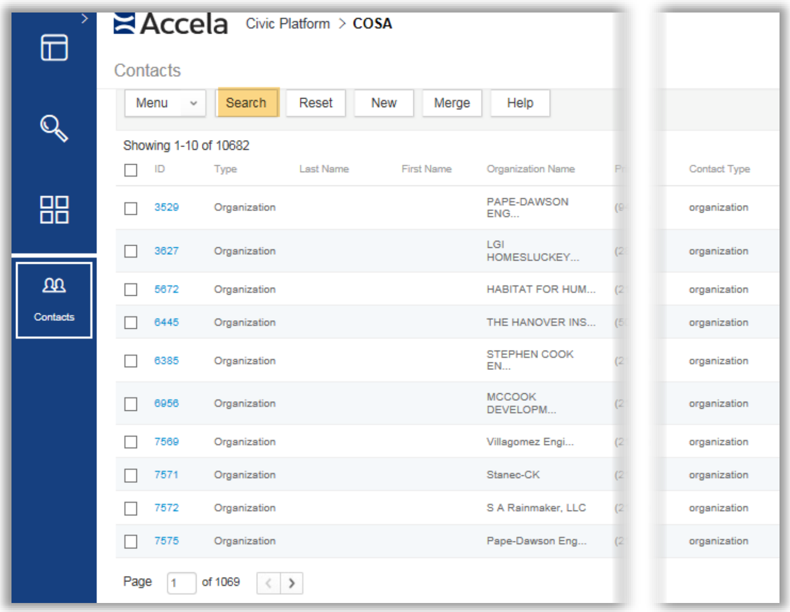
Conditions and Addresses, Contacts or Parcels

- ***IMPORTANT: Conditions added to an Owner(s) are added in the transactional record level.***

1. From the Launchpad, **navigate** to All Pages (#1 shown).
2. **Filter** for Addresses, Contacts or Parcels (#2 shown).
3. **Click** the *Address, Parcels or Contacts* hyperlink, as applicable (#3 shown).

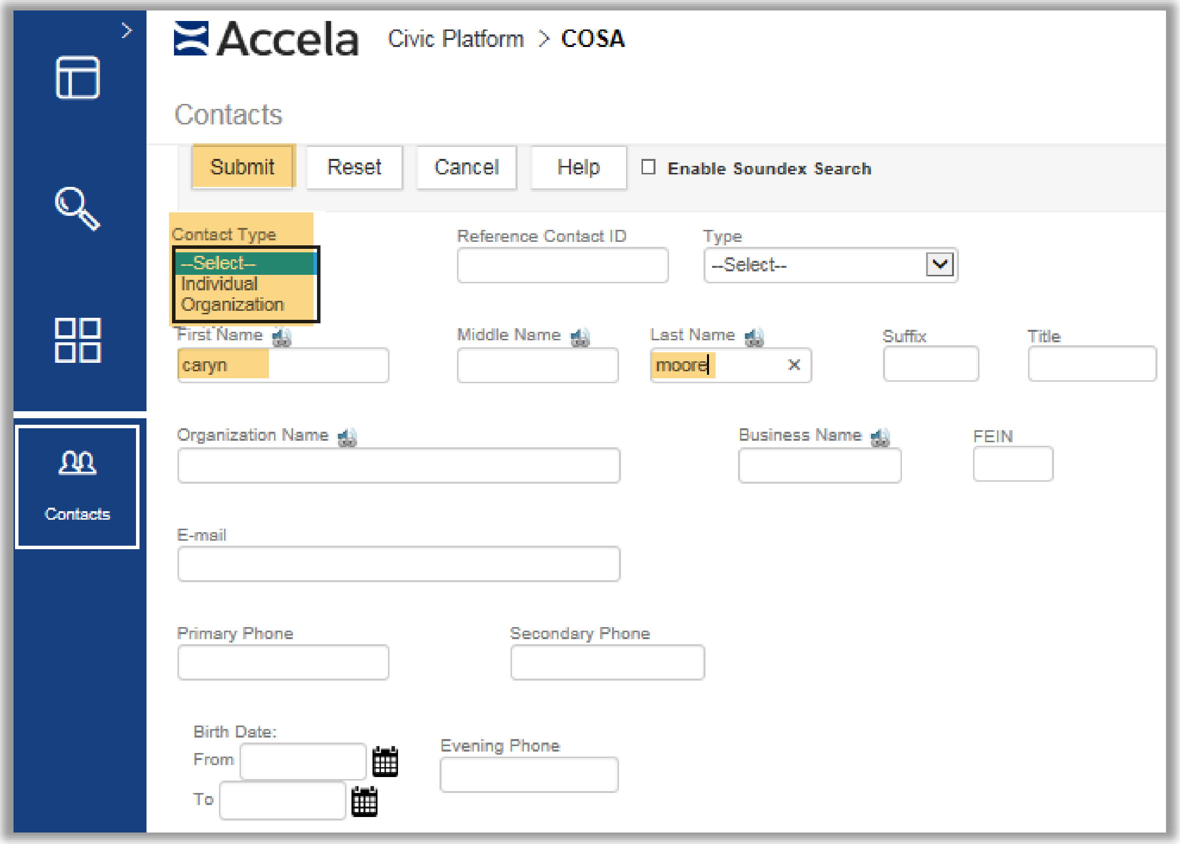


4. The Search page displays. For our example, we are using searching Contacts (shown).

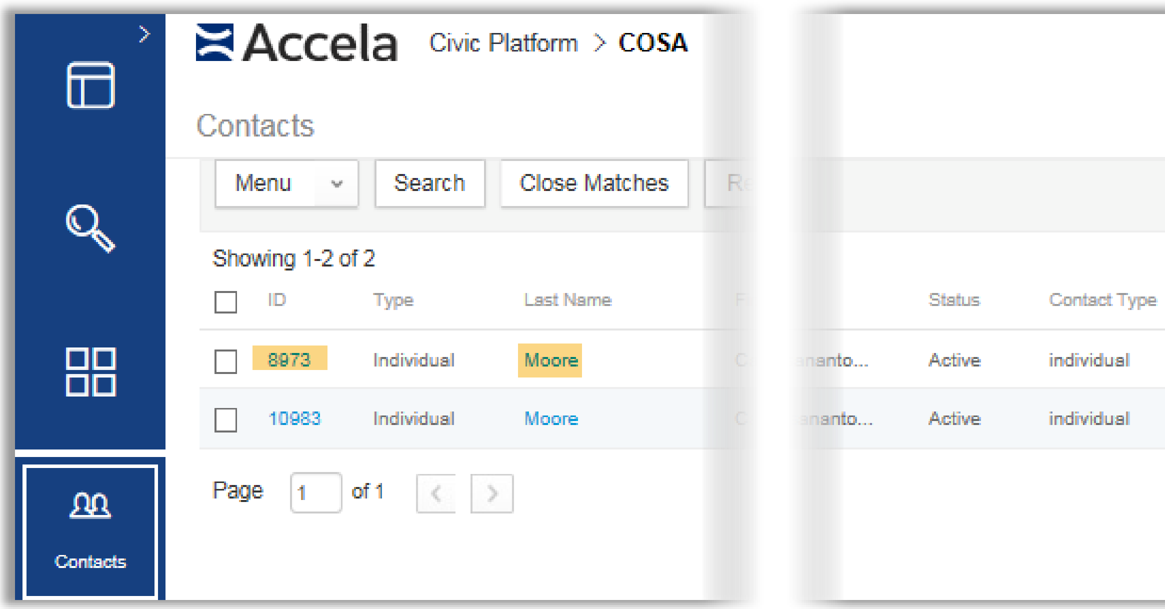


5. **Select** Contact Type from drop-down menu options: Individual or Organization (shown).
6. **Complete** other fields on the page with information you may have.

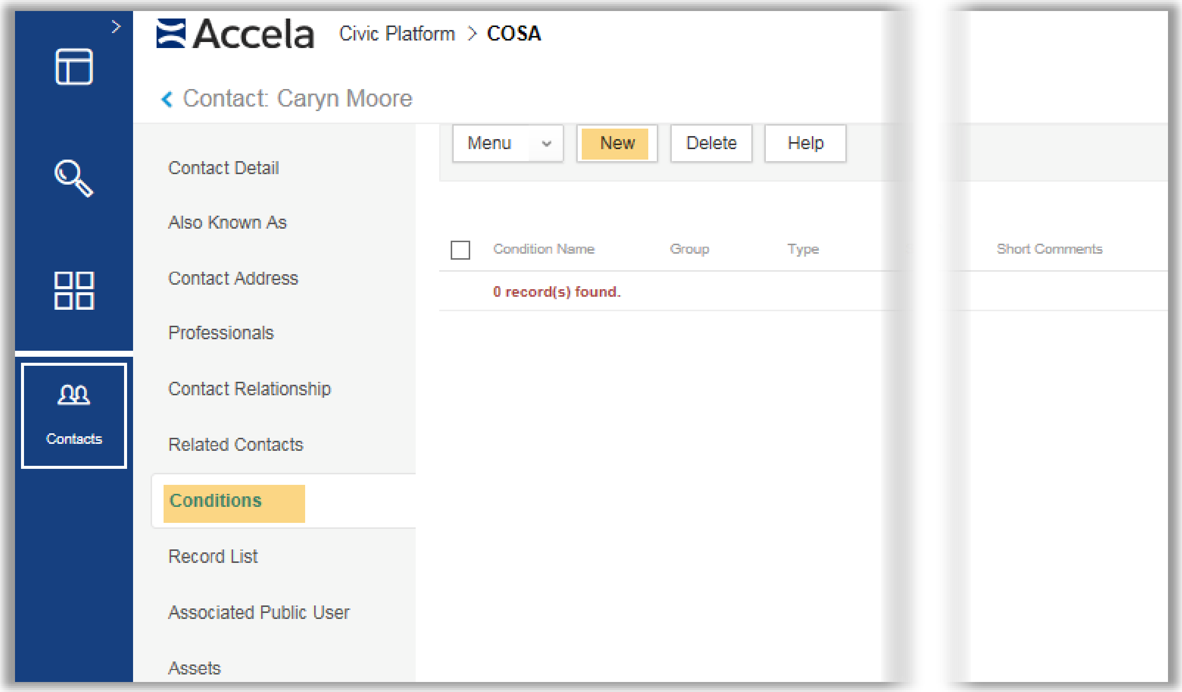
7. **Click** *Submit* (shown). BuildSA returns all search results (shown).



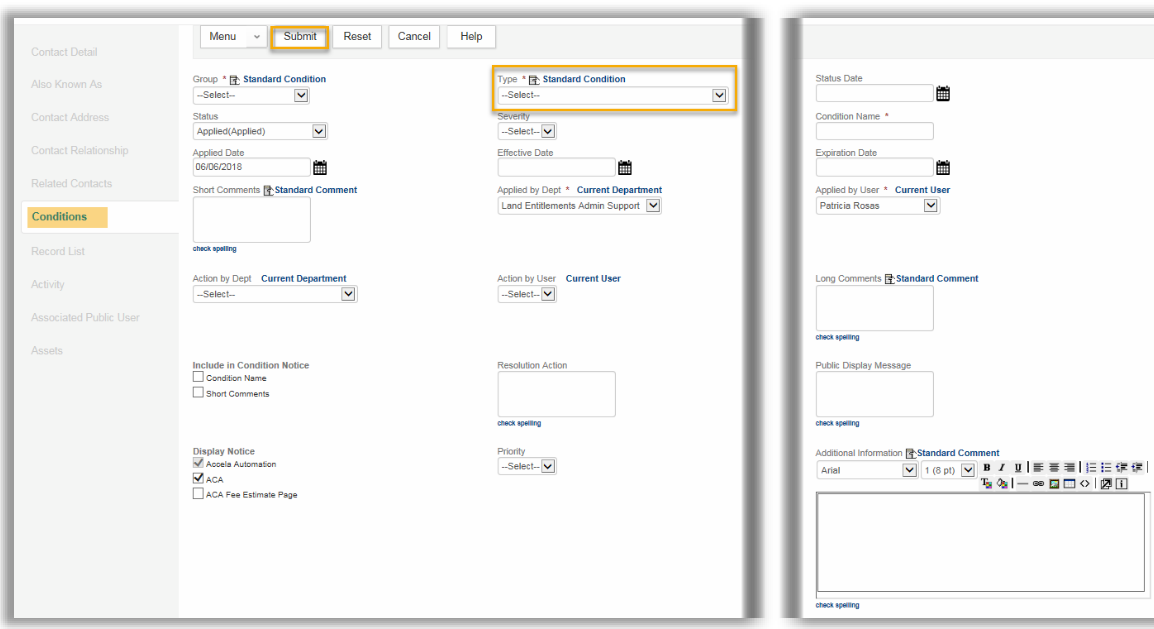
8. **Click** on the *ID number* or the *Last Name* hyperlink of the Contact (shown).



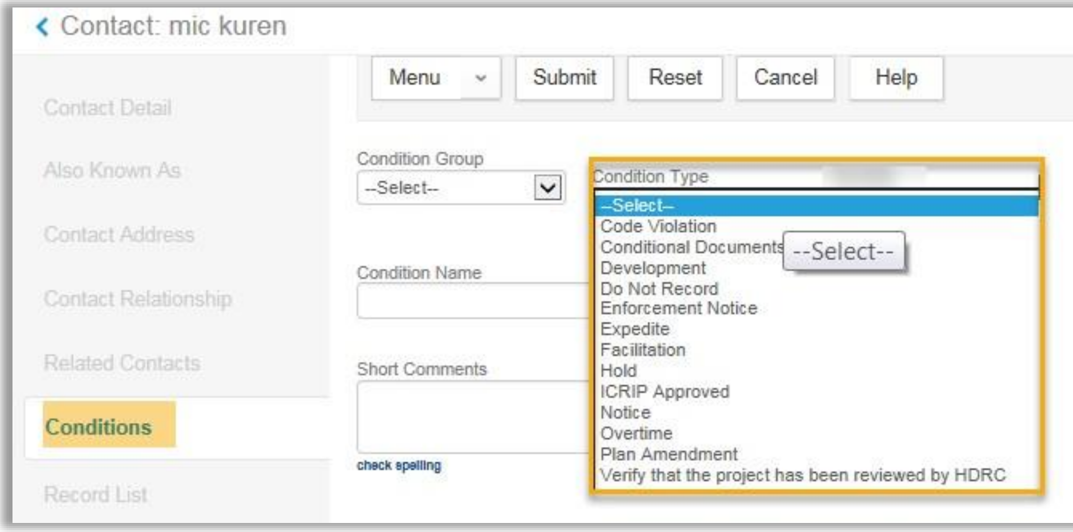
9. The Contact detail page displays (shown).From the Contact Detail page navigation bar, **click** the <u>Conditions Tab</u> (shown).



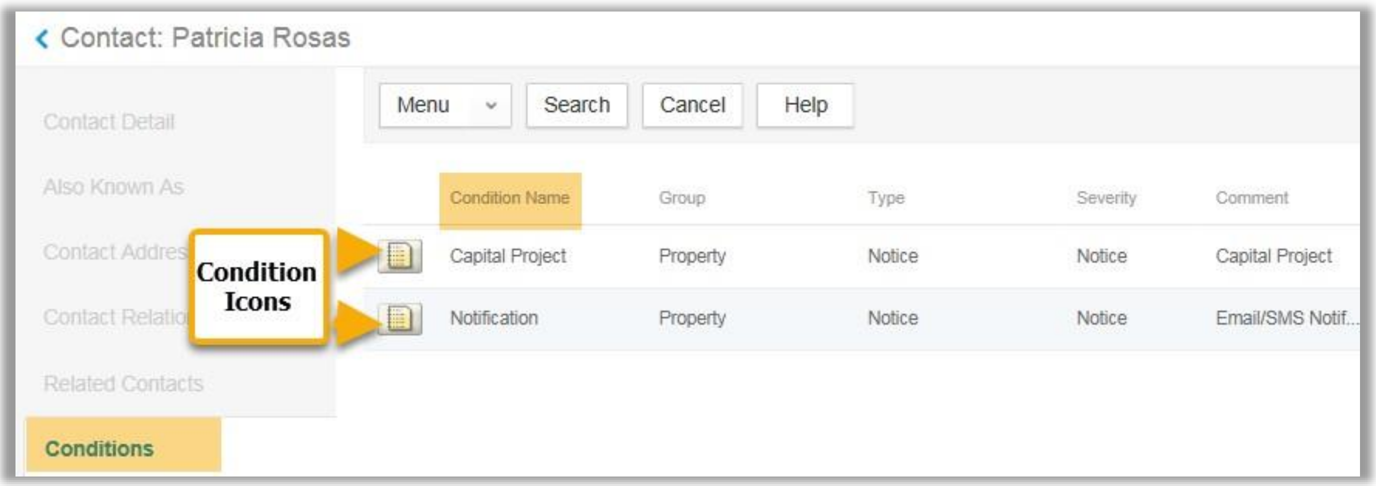
10. **Click** *New*.
11. The Condition intake form displays (shown).



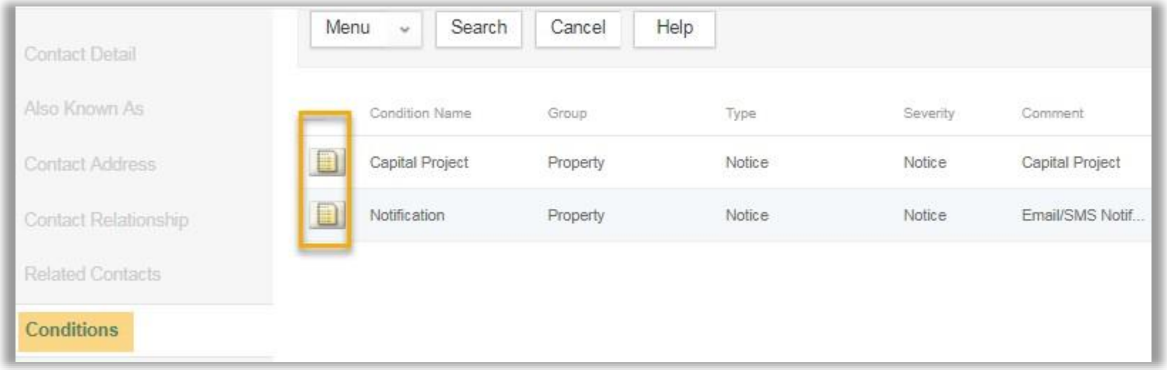
12. **Click** on the *Standard Condition* hyperlink (shown). The Condition selection page displays (shown).
13. **Click** on the *Condition Type* drop-down menu to select Condition (shown).



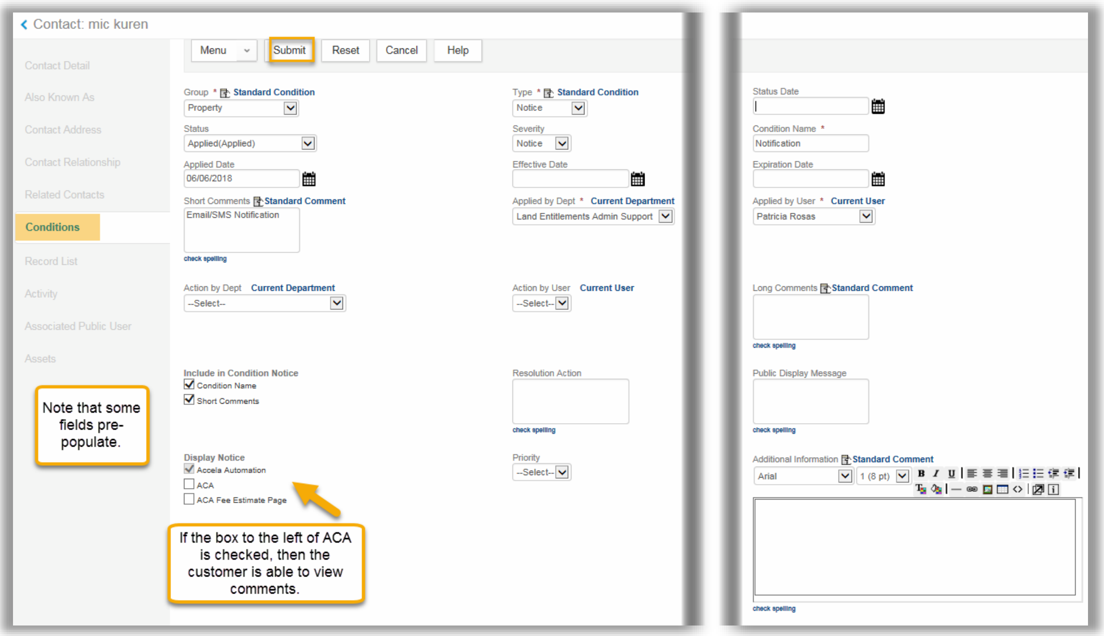
14. **Click** Submit. The Type information on the Condition Name and Short Comments field text boxes, as necessary. These two fields are not required.
15. **Click** *Submit.*
16. A list of applicable conditions for the Contact displays (shown).



17. To make a selection, **Click** on the Condition icon to the left of the Condition Name column (shown).



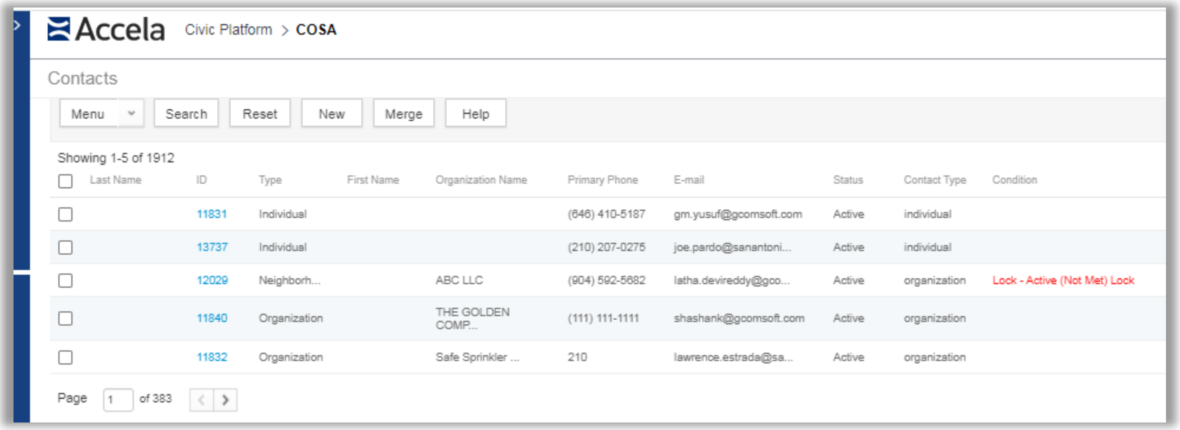
18. The *Condition* page displays (shown). Note that some fields are pre-populated. **Complete** the required fields.



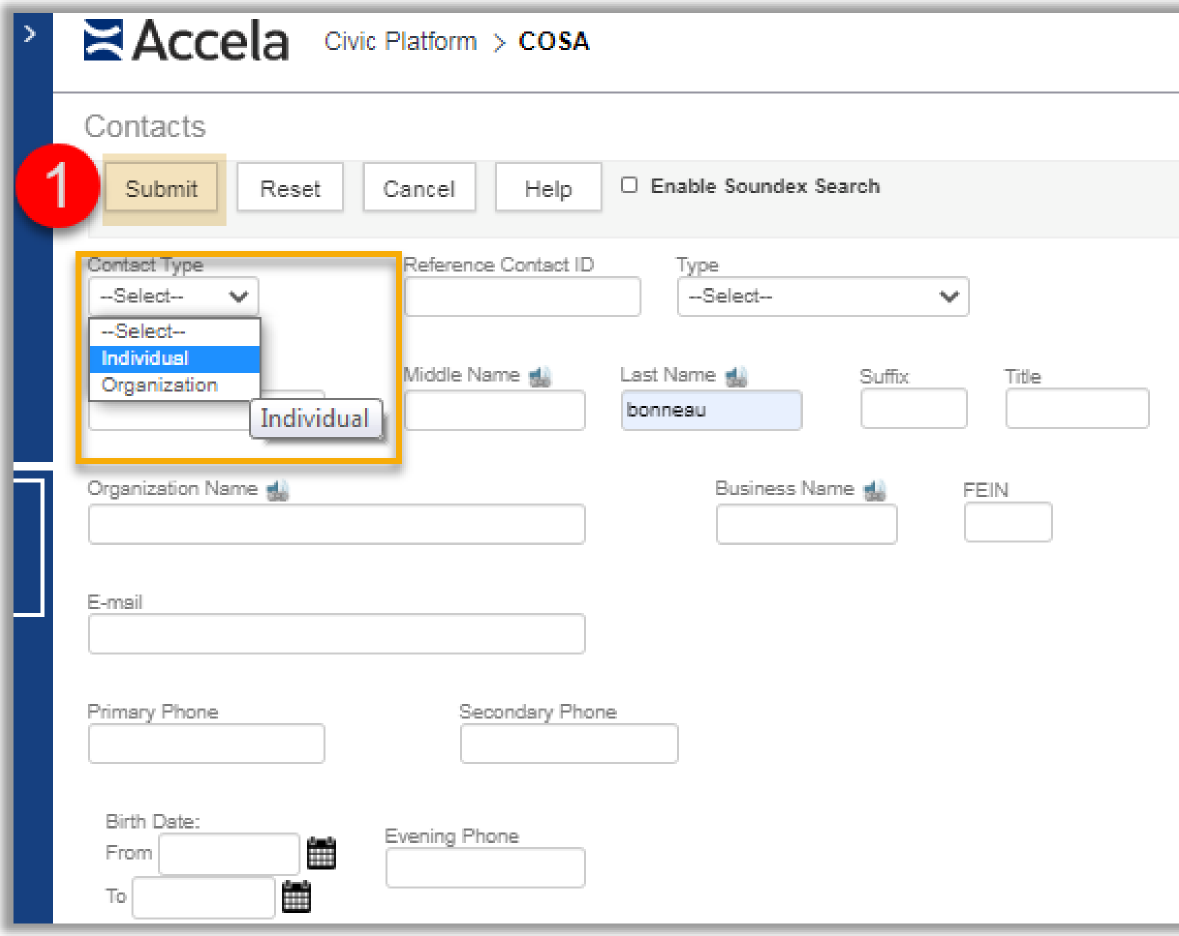
19. **Click** *Submit.* A Condition notice displays on active records and any future record created when the user pulls the reference database information for the Contact (shown).

Removing a Condition from a Contact

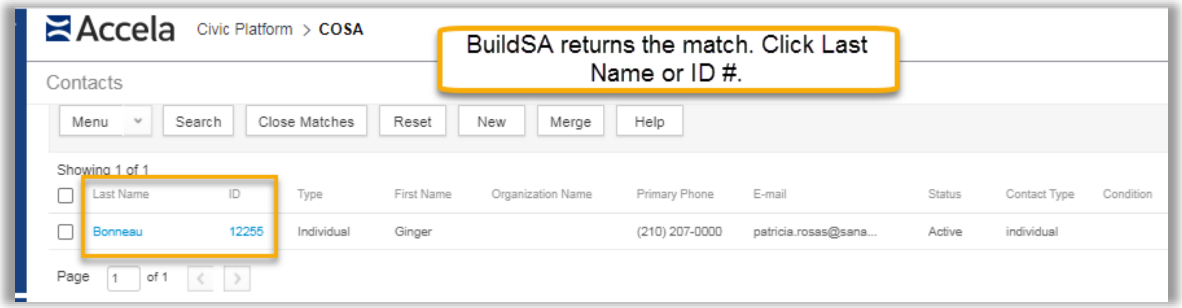
1. From the Launchpad, **navigate** to All Pages (shown). **Filter** for Contacts.
2. The Search page displays. **Click** Search.



3. The Search page displays. **Select** Individual or Organization**. Complete** fields with information you may have. **Click** Submit (#1).

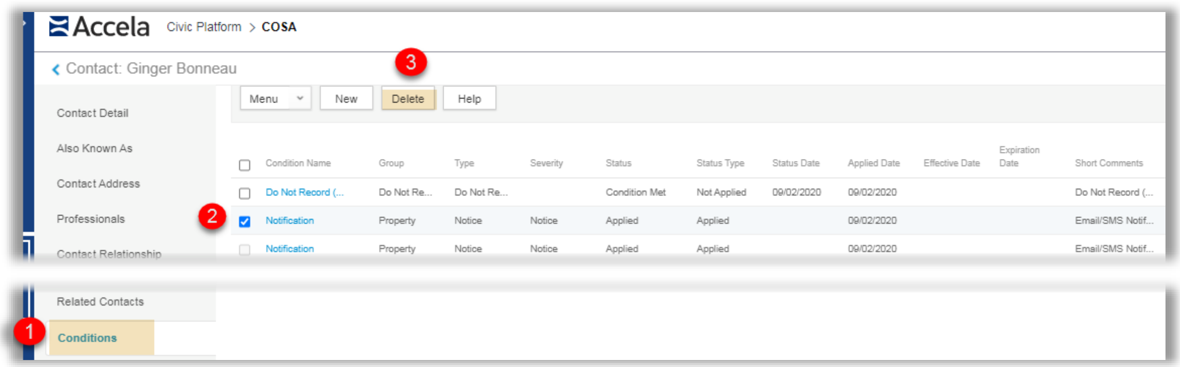


4. BuildSA returns all search results (shown). **Click** the *ID number* or the *Last Name* hyperlink of the Contact (shown).



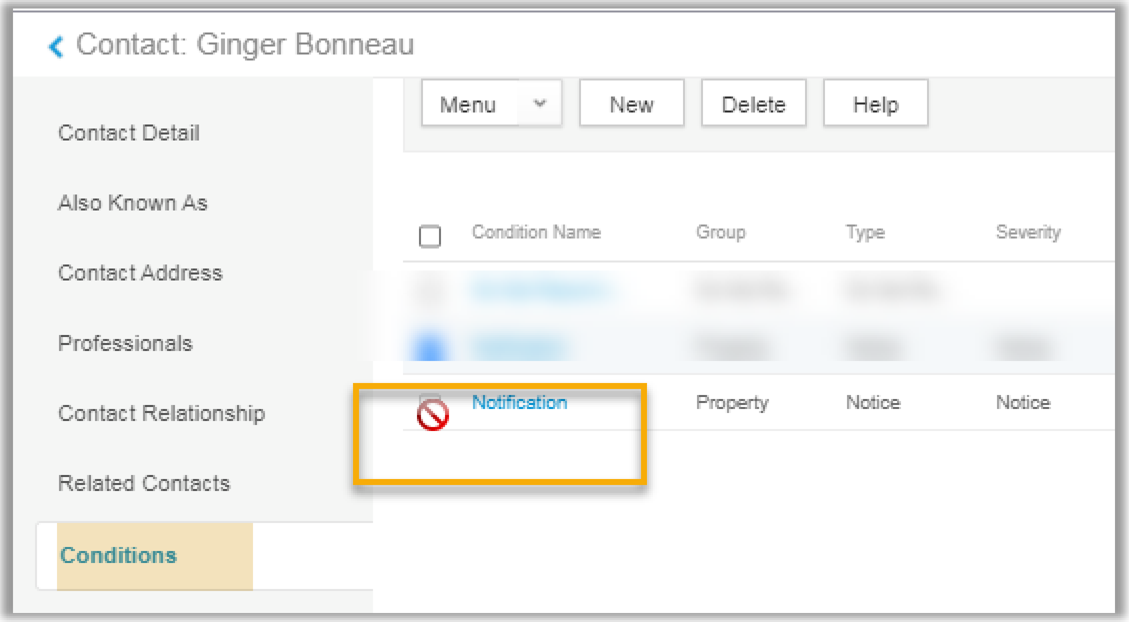
5. The Contact detail page displays (shown).
6. From the Contact Detail page navigation bar, **click** the Conditions Tab (#1).

7. **Click** the box to the left of the Condition you want to Delete (deactivate) (2). **Even though Delete is selected, the Condition becomes inactive. Once a condition is created, it remains part of the history of the record.**
8. **Click** the Delete button (#3).



9. BuildSA generates a 1 record(s) deleted successfully (shown). Note that a 'deleted' condition cannot be selected (shown). The box to the left of the Condition Name is greyed-out and displays a red cross-out (shown).

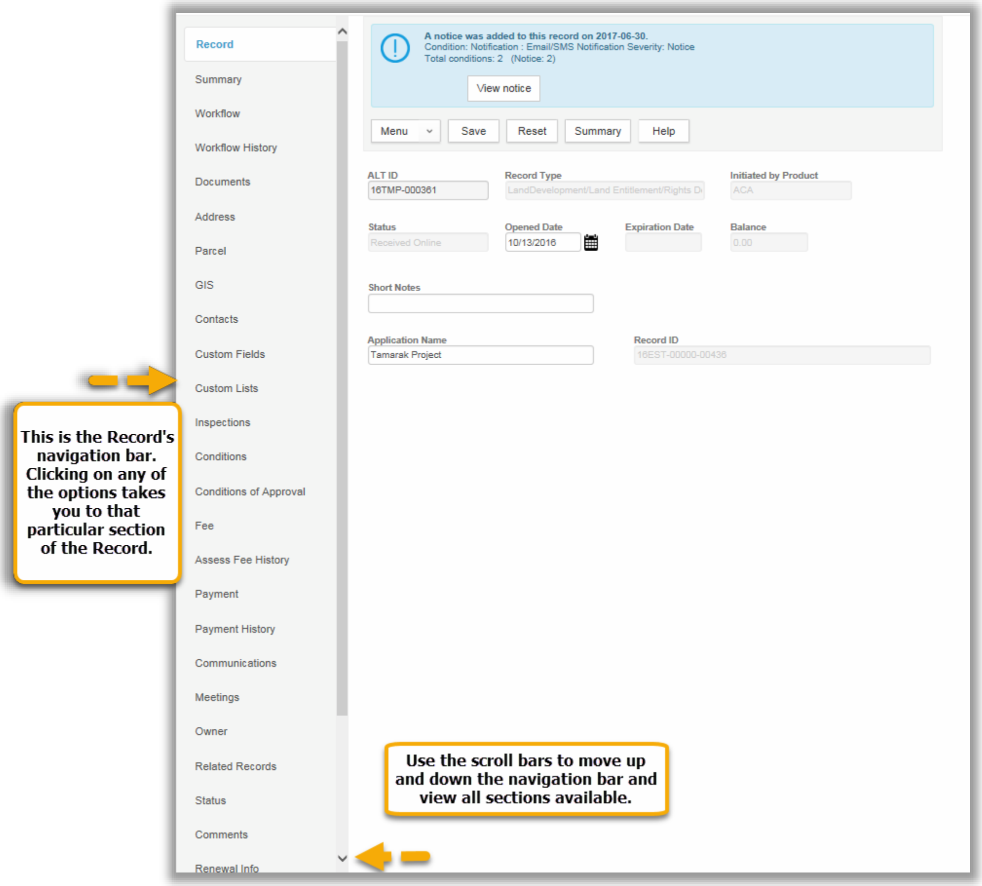
Important: Deleting a Condition is different from updating the Condition Status to 'Status Met'. Ensure to follow business processes and contact your supervisor with questions about Conditions.



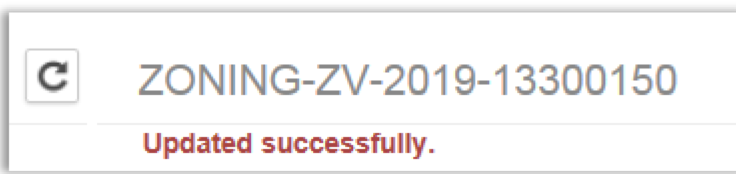
Updating Records

Updating Records for application specific workflow tasks is covered in detail during **Application Specific** training sessions. General Functionality presents the options available to the end-user.

1. **Click** the Launchpad.
2. **Retrieve** the Record using the Global Search (1), All Pages-Record Search (2) or the Recent Record list (3) (shown).
3. **Open** the Record. To edit a particular record detail section, use the record's navigation bar. **Click** a tab to view or update information as necessary following the business workflow process.
4. Save your updates!



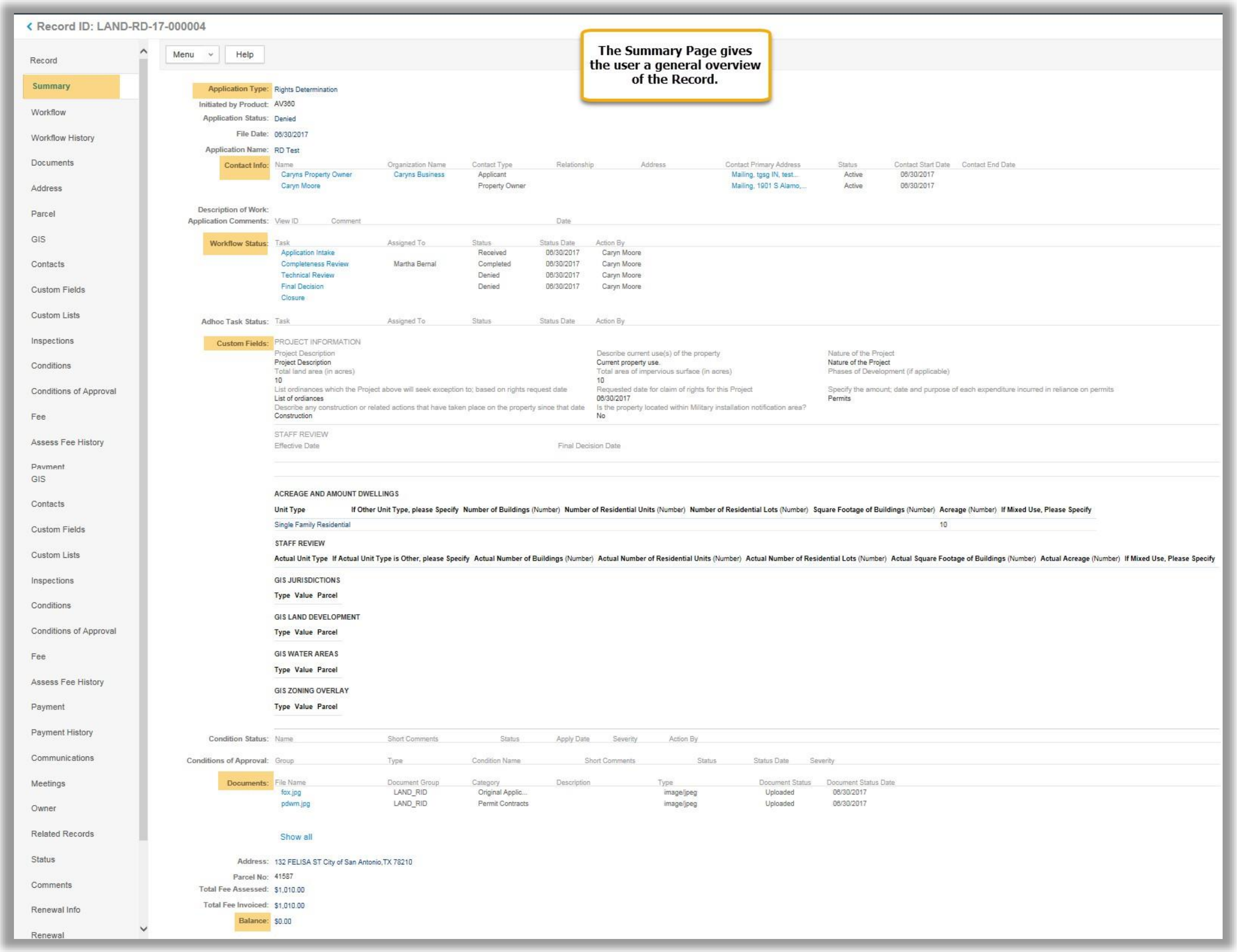
❖ ***When the information on any tab within the Record is updated successfully, BuildSA generates the message below (shown).***



The Summary Tab on the Record's Navigation Bar

Use the Summary Tab to examine the overall details of the Record.

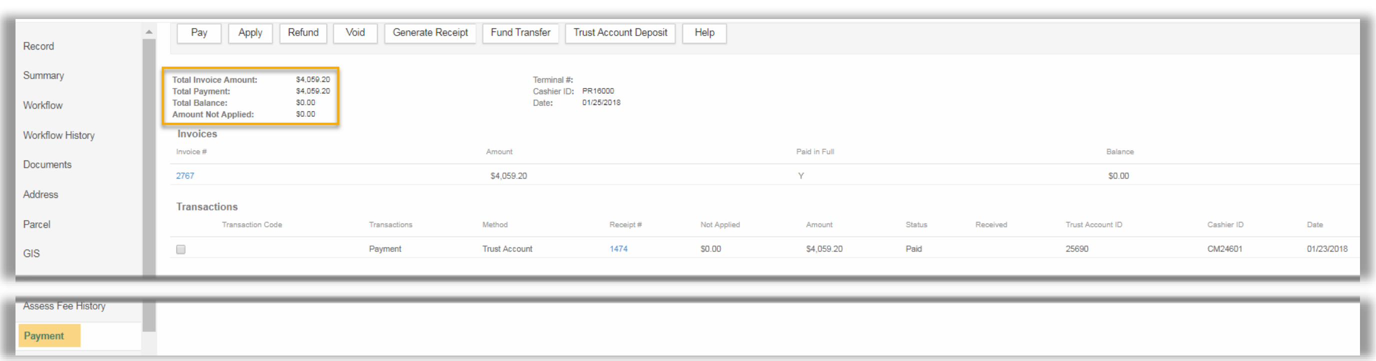
1. **Retrieve** the record.
2. From the Record's navigation bar, **click** the Summary Tab (shown).



3. The **Summary** page displays a general overview of the record.

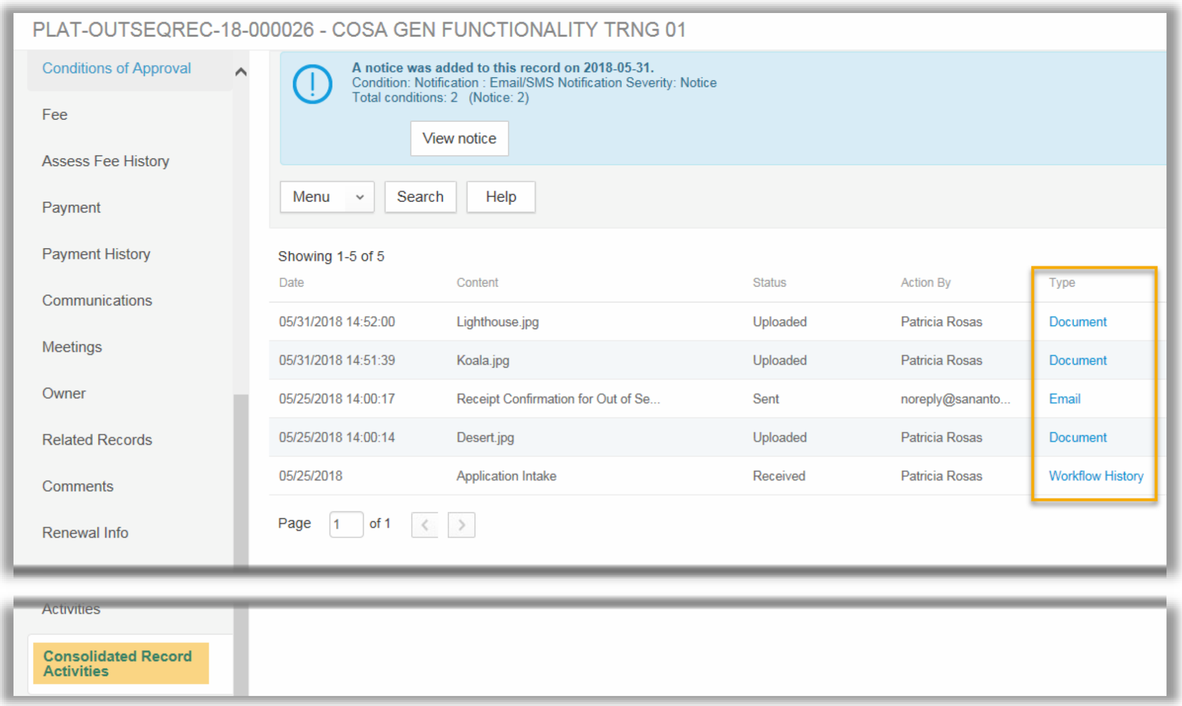
    1. Click any of the hyperlinks within the Summary Page to view more detailed information.

    2. Click the Balance hyperlink of the Summary Page to view Payment information. Note: Clicking the Balance hyperlink takes the user directly to the Payment Tab of the Record (shown).



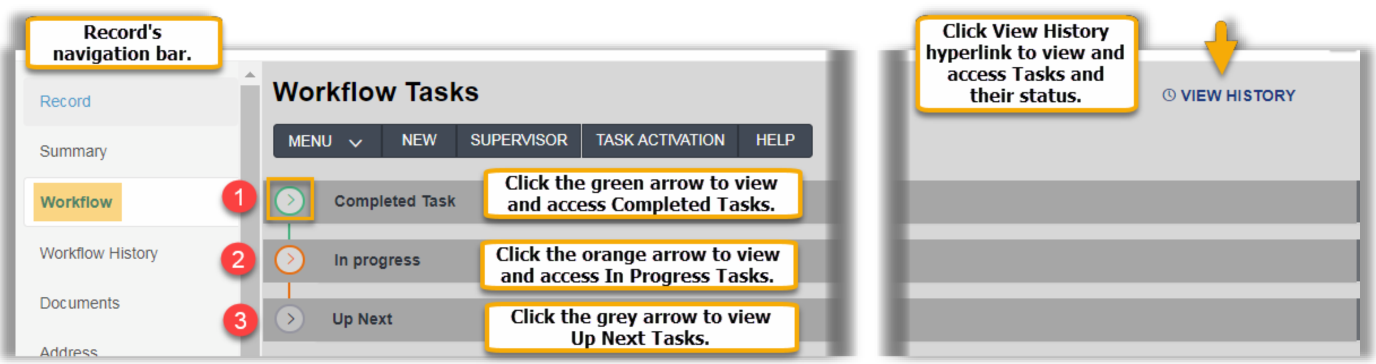
The Consolidated Record Activities Tab

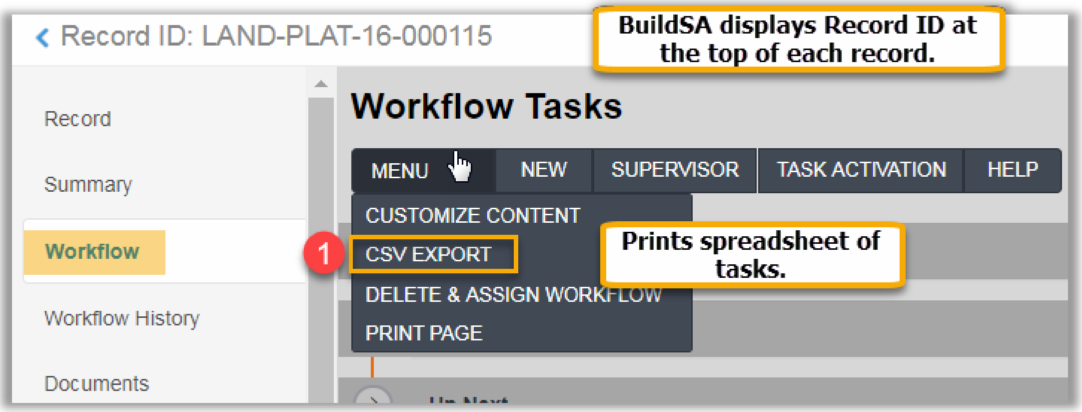
Use the Consolidated Record Activities Tab to view and access activities associated with the Record. Click the Type column hyperlink to view document, email, workflow history, etc.



Workflow Process

The *workflow* of a record refers to the set of tasks that the Development Services Department follows to process a record. After a record is created, the workflow functions as an automated to-do list. This to do list enables the user to systematically follow a progression of steps and successfully move the record from application in-take to closing.





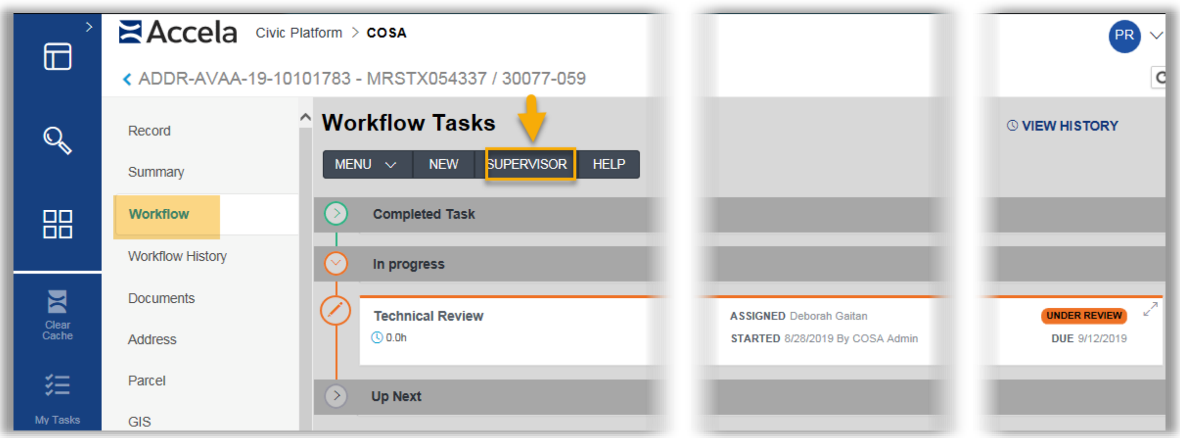
IMPORTANT: Using *Delete & Assign Workflow* or *Customize Content* options from this drop-down menu is not a business process. Do Not Use.

Activating/Deactivating Tasks

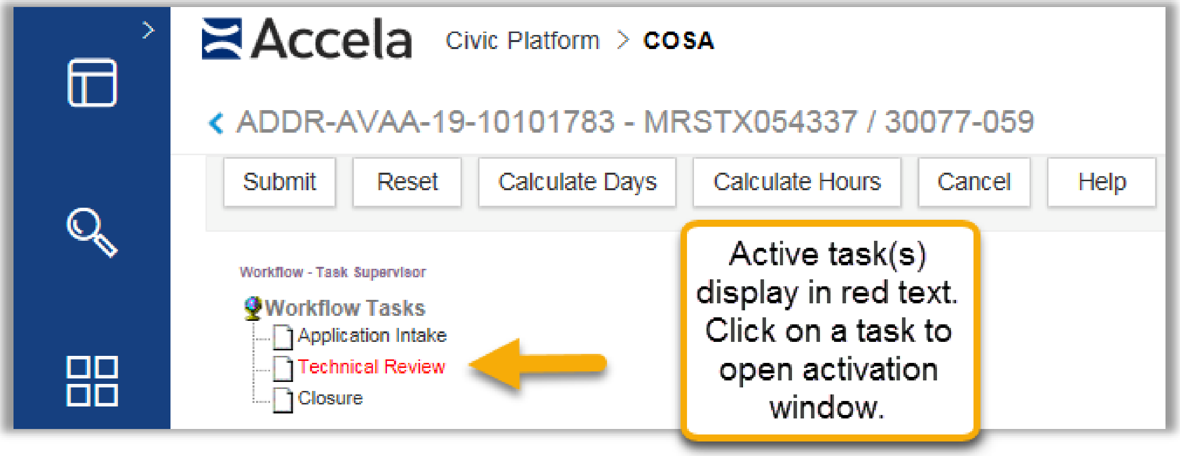
Managers/Supervisors may activate or deactivate a task. Applying this function to a record impacts the workflow process of the record.

To activate or deactivate a task

1. From the Record's navigation bar, **click** the Workflow Tab.
2. **Click** the Supervisor link located at the top of the page (shown).

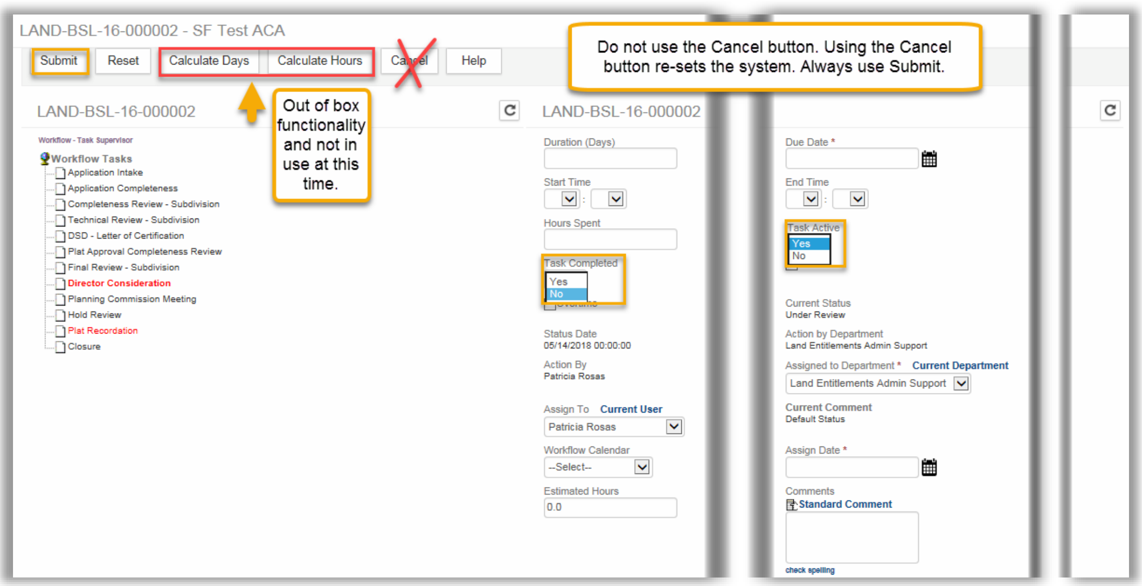


3. The Workflow Task page displays. The active task displays in red text. Click on any of the tasks listed that you want to activate or de-activate.

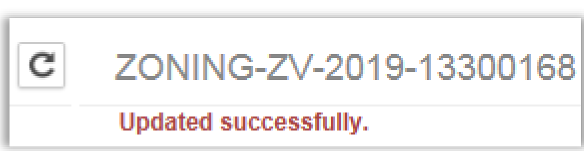


4. Task activation window displays (shown). **Scroll** to the Task Completed drop down menu on the first activation column to select:
   a. **YES** = if task is completed
   b. **NO** = if task is not completed

5. Scroll to the right-hand activation column and complete required fields. From the Task Active drop-down menu select:
   a. **YES** = if task is active
   b. **NO** = if task is not active



6. **Click** Submit. After Submit is clicked, BuildSA displays an *Updated successfully* message:



7. **Click** Cancel to exit the page.

Updating a Task

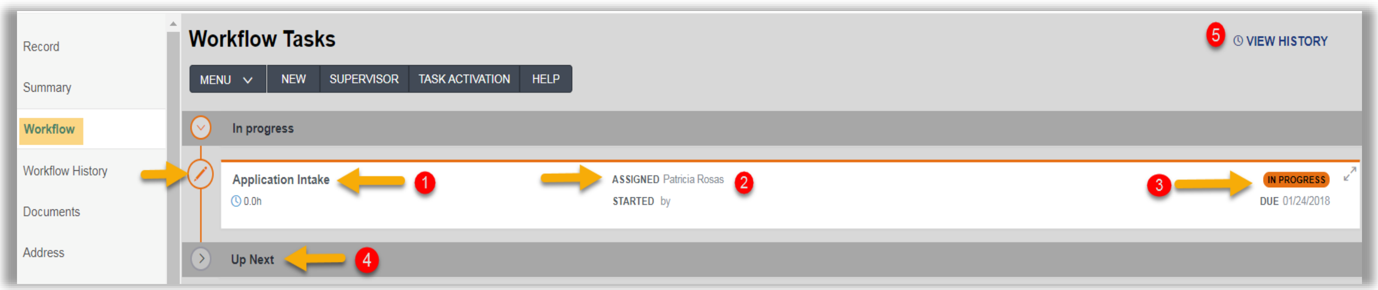
Application-specific training covers all aspects of updating tasks and workflow processes for specific record types.

BuildSA uses navigation bars to access the different pages within a record.

❖ ***NOTE: Active Tasks are located under the In Progress section of the record's workflow navigation tab.***

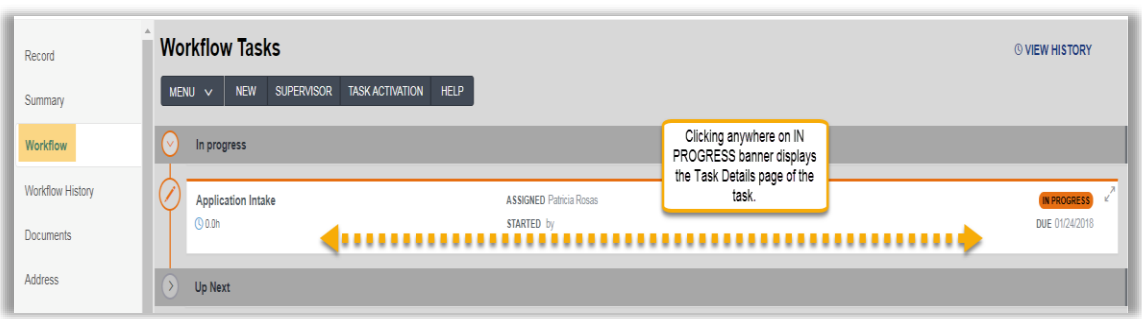
1. **Open** the record.

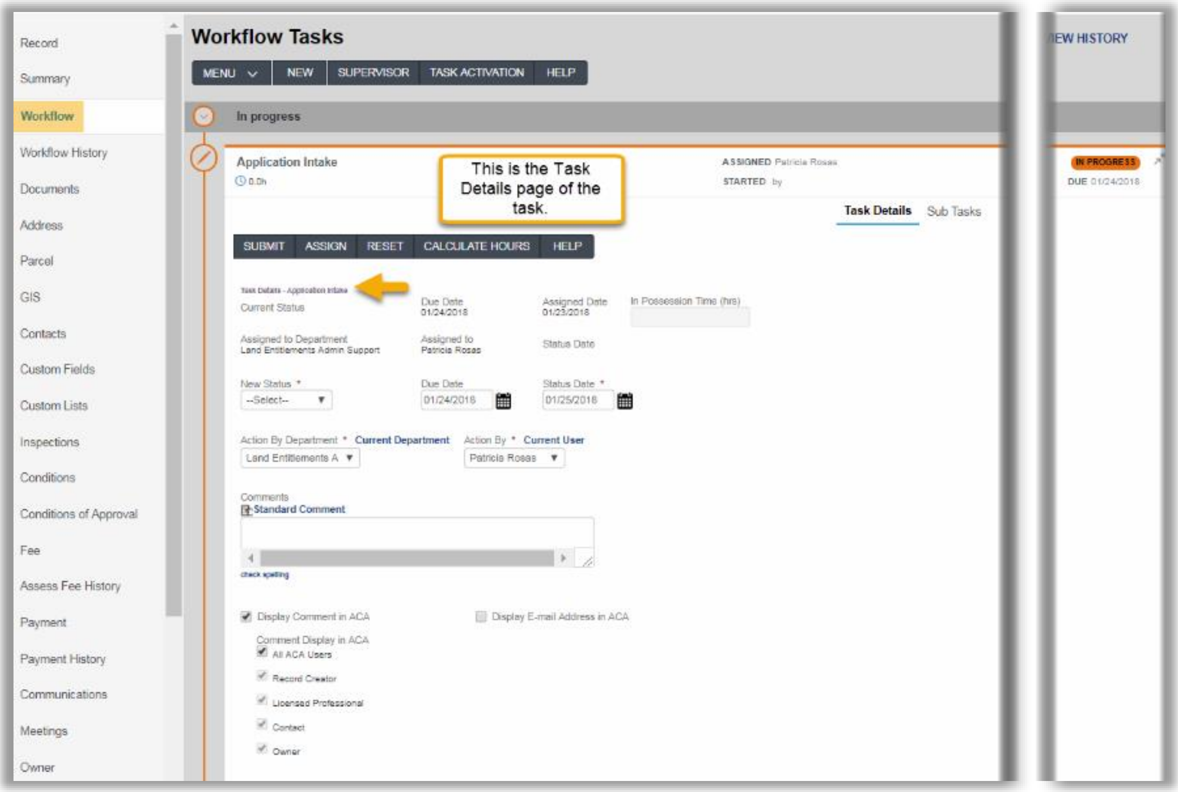
   From the Record's navigation bar, **click** the Workflow Tab. The Workflow page displays (shown). In the example below, the *Application Intake* is the active task. Note the active task is identifiable by the **IN PROGRESS** button (shown).



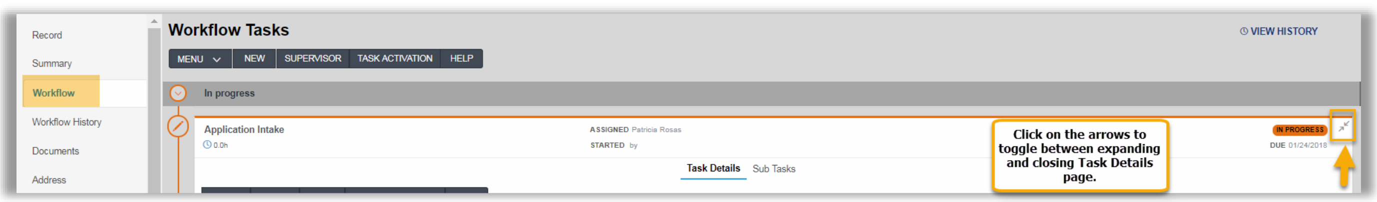
- #1: **Active Task**: Note the pencil icon
- #2: **Task Assignment**
- #3: **Status** and **Performance Due Date**
- #4: View **Upcoming Workflow Tasks**
- #5: View **Workflow History**

❖ ***Click anywhere on the IN PROGRESS banner to open the Task Details page for the active task or click the double arrow at the far right of the task banner (shown).***

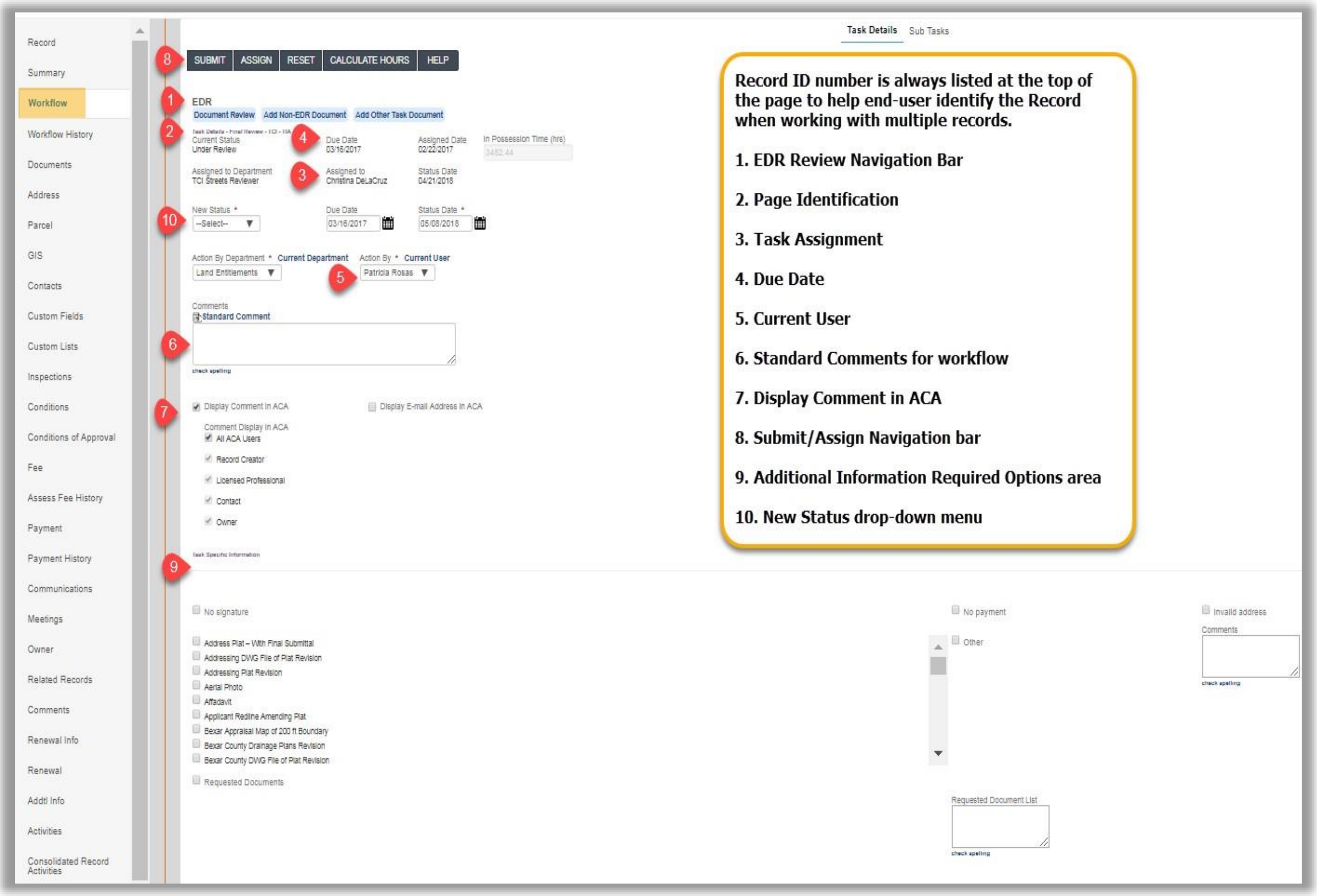




❖ ***Click the double arrows in the upper right-hand corner to toggle between expanding and closing the Task Detailspage (shown).***



2. **Click** the IN PROGRESS round button or anywhere on an active task banner. The Record’s workflow task details page displays (shown).

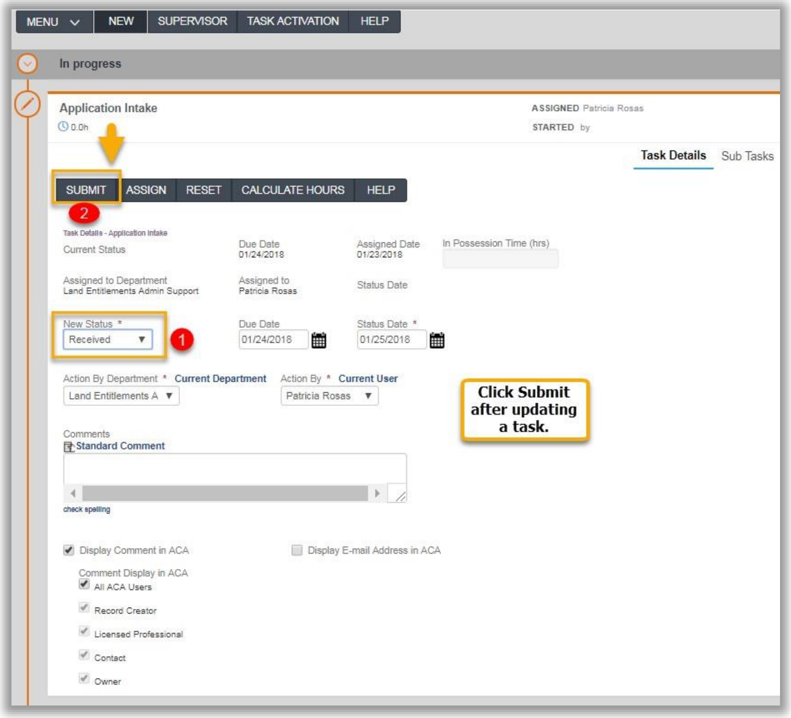


3. **Update** the workflow task(s) as per business processes discussed in application-specific training. Please contact your supervisor with any questions on updating a task.

   General information on the Outcome of Updating the Tasks follows.

End-users shall double-check the selected status of a Record that is being updated before clicking Submit. Selecting an erroneous status results in implications to the workflow tasks of a Record.

4. **Click** *Submit* after updating the Status of a task. *Submit* is found on the top menu bar of the Task Details page.

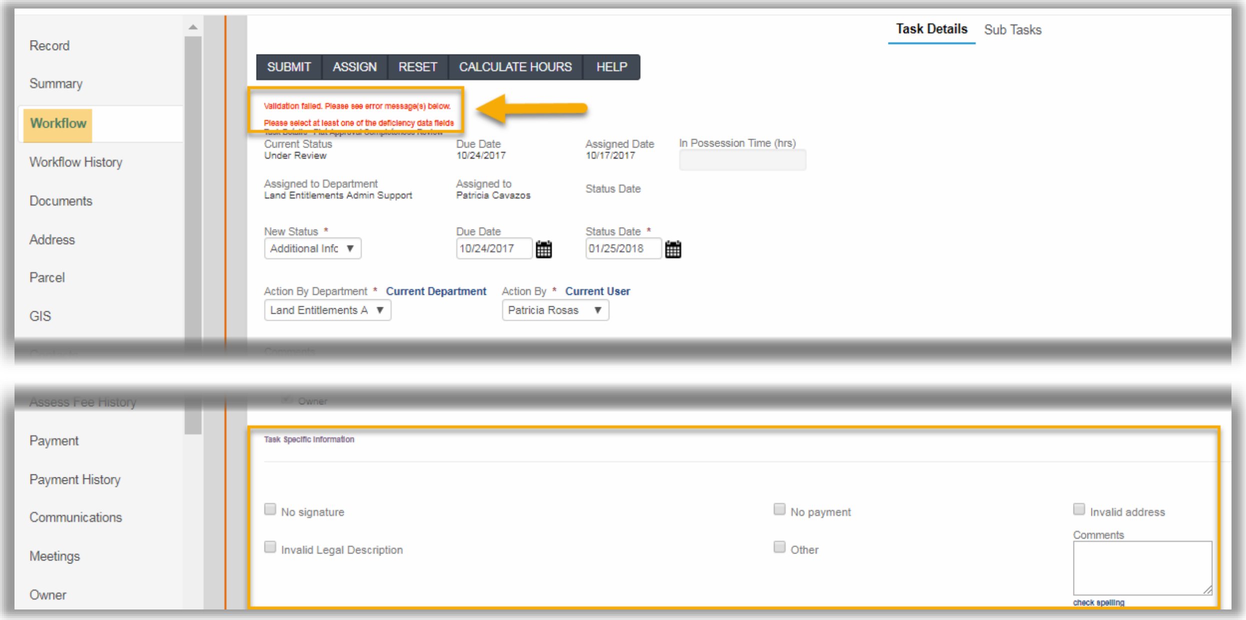


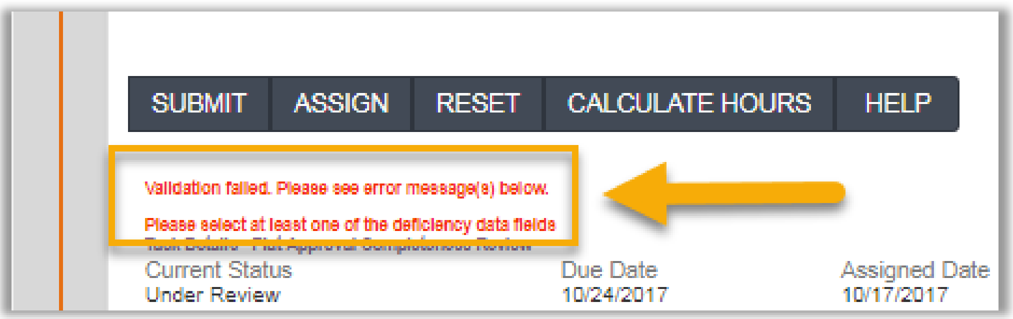
5. The Record is systematically updated. The customer is able to view updated information in the Citizen Portal.

Outcome of Updating Task Status

1. If **Additional Information Required** status is selected, then after clicking Submit:

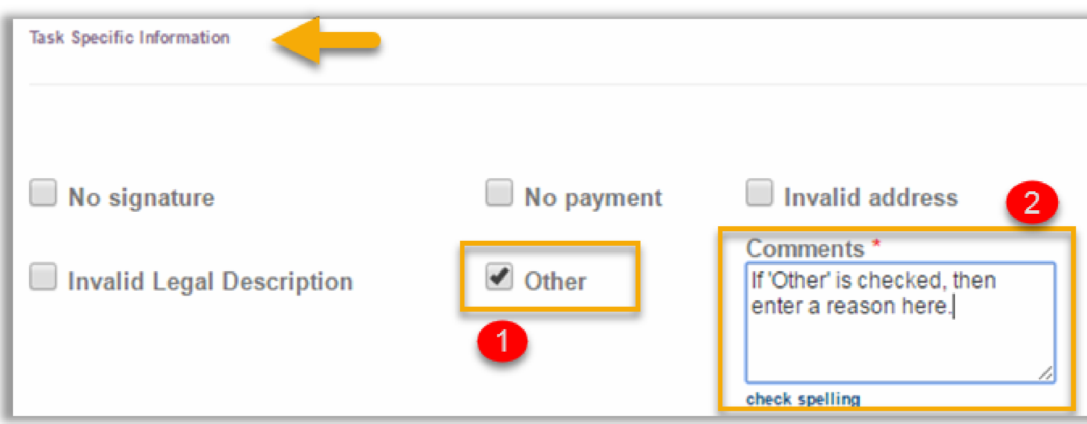
    a. If the status of **Additional Information Required** is selected, but a deficiency reason is **NOT** selected, the following error message displays:





A deficiency reason must be selected from the available options at the bottom of the Task Specific Information section of the page (shown).

b. If the deficiency reason *Other* is selected, then the Comments text box becomes a required field (shown). **Type** a reason in the *Comments* field text box (shown).



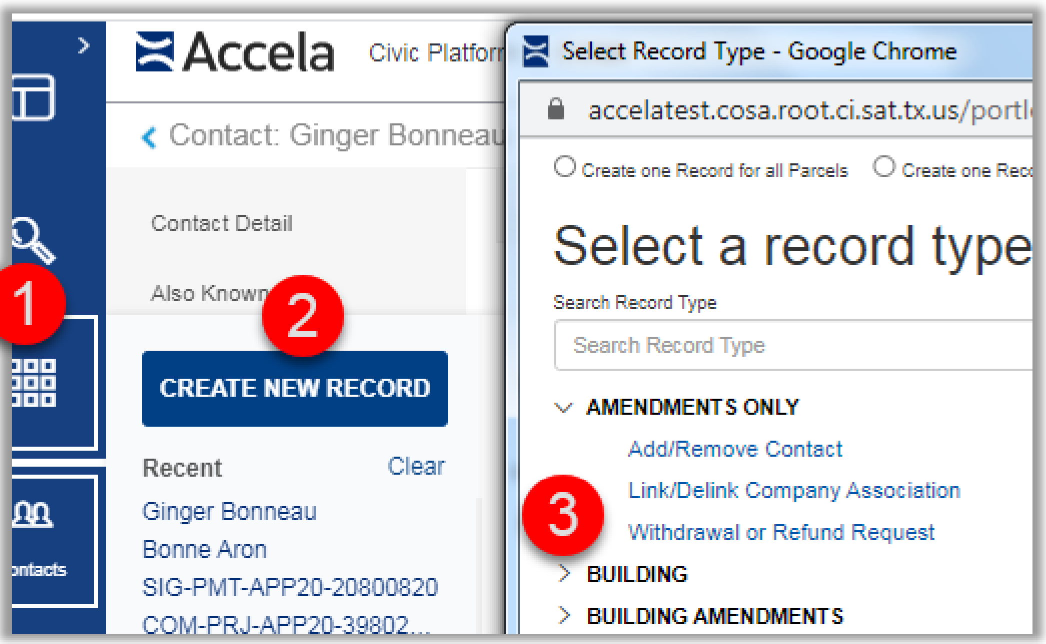
c. If the deficiency is selected correctly, the task status and the application change to

Additional Information Required and an ✉ email notice is generated to the Applicant listing the deficiency reason and comments typed.

❖ ***NOTE: When the information is submitted by the customer, the task status changes to Additional Information Received and the Task appears on your daily task work list.***

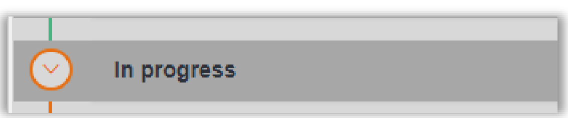
2. If status of **Completed** is selected, then after clicking Submit:
    a. The workflow task closes.
    b. The next task in the workflow process activates, dependent on application type.
3. If status of **Withdrawn** is selected, then after clicking Submit:
    a. Any remaining active tasks close with status of Withdrawn and the Application status updates to Withdrawn.

Important: The Withdrawn status is used by DSD staff and only when the application is erroneously created. If the withdrawn is requested by the applicant, a Withdrawal or Refund Request amendment record must be created using the AMENDMENTS ONLY category link (shown). Please see your supervisor with questions.



Parallel Tasks

Parallel tasks **appear in orange and under the In Progress section of** the automated workflow to-do list. These tasks are available for updating by the various task owners (for example: DSD, TCI, etc.) and



at the same time. All end-users are able to view comments typed by other agencies.

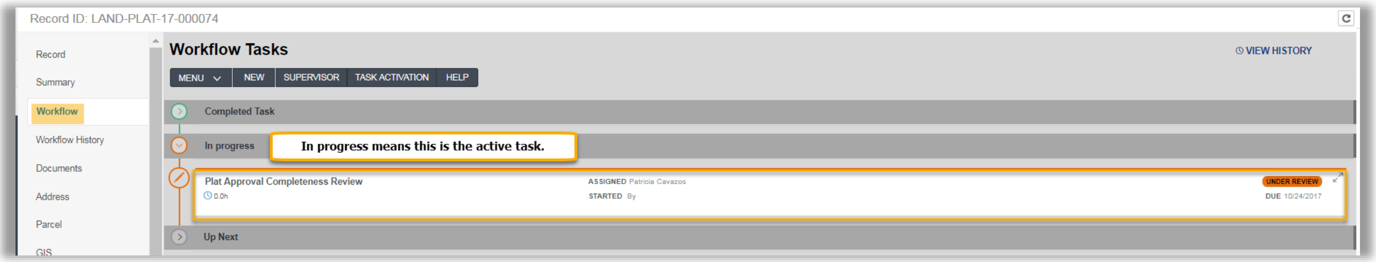
Workflow tasks are marked as follows:

- *Active* tasks appear in the In Progress section and must be completed before the workflow can move forward.
    - ***DSD Staff is able to activate/de-activate tasks, as necessary. This function is explored in application-specific training. Please see your supervisor with questions.***
- Tasks that are not *Active* become inactive after being completed and remain visible on the workflow to do list. They appear in the Completed section.
- Up Next tasks are read-only, awaiting activation, and display at the bottom of the Workflow Task list.
- Users may also click on the Workflow History Tab for information about workflow progression and to read comments on previous tasks.

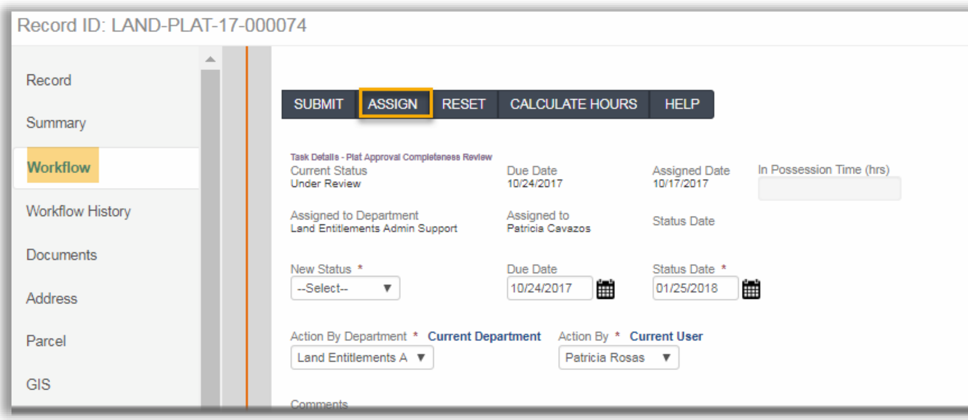
Assigning Workflow Tasks

❖ ***NOTE: Assigning a workflow task is dependent on the business process of the individual work group. If you have any questions about assigning workflow tasks, please see your supervisor.***

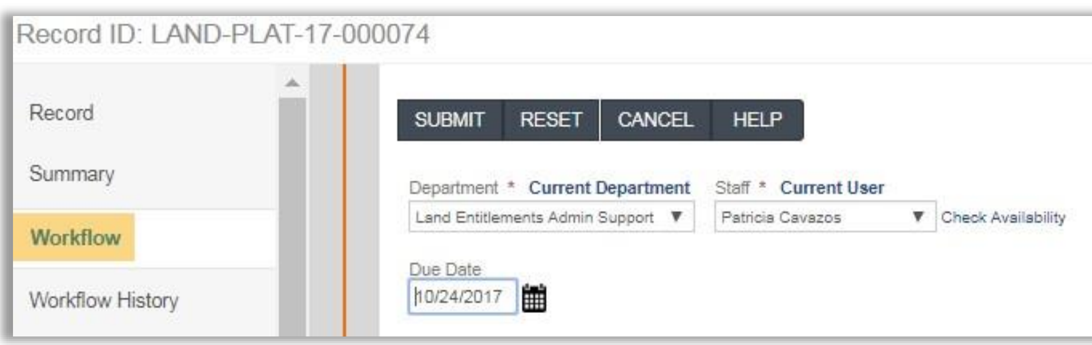
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** the <u>Workflow Tab</u> (shown).



3. **Click** the Active task banner. In this example, the *Task Details-Plat Approved Completeness Review* Detail page displays (shown).

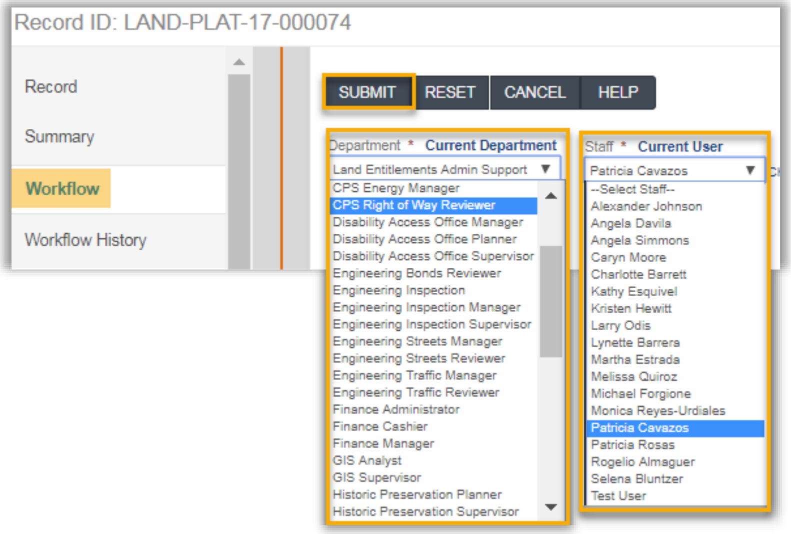


4. **Click** the *Assign* button located on the top menu bar (shown). The *Assign* page displays (shown).



5. **Click** the *Department* drop-down menu to view the different department options. **Click** your selection (shown).

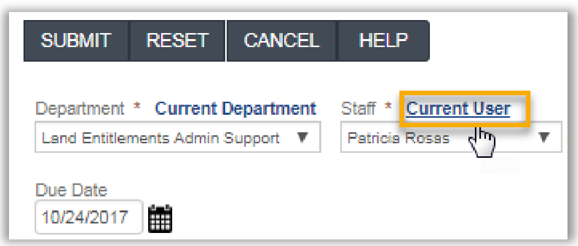
6. **Click** the *Staff* drop-down menu to view options and make selection (shown).



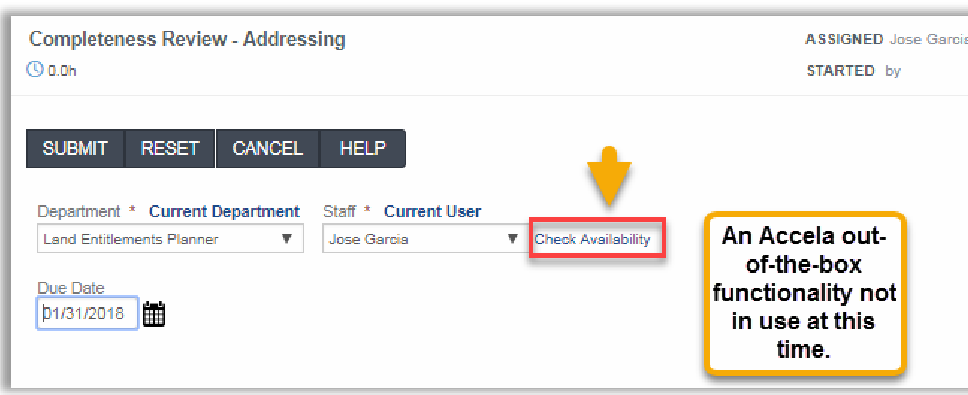
7. **Click** *Submit.*

8. **Click** the *Refresh* button (shown).  The task is now assigned. Review for accuracy.

❖ ***Note: Double-clicking the Current User hyperlink updates task to Current Department and User (shown).***



❖ ***Note: Use the Calendar icon to select effective date (shown).***



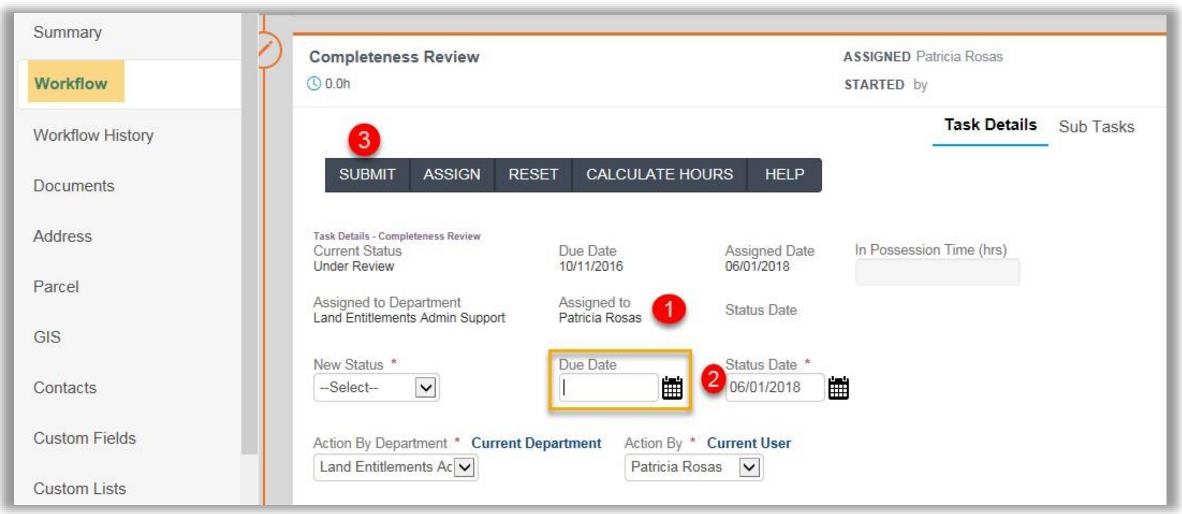
Due Date Field

❖ ***IMPORTANT: The Due Date Field must be filled before clicking Submit on a newly assigned task.***

To Complete the Due Date

1. After assigning the task, **navigate** to the Due Date field (shown).
2. Type or use the Calendar icon to **select** accurate Due Date based on business process guidelines.

❖ ***IMPORTANT: This field must have a due date before Submitting; otherwise, the Performance Measures are impacted. Follow the business process guidelines of the Record Type and Task to ensure the accurate date. Application-specific training encompasses Due Dates for tasks. Please see supervisors with any questions about Due Dates.***



Self-Assignment of Tasks

To self-assign a task

1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Workflow Tab.
3. **Click** the *Active* task that you want to assign (shown). The *Task Details* page displays.
4. **Click** the *Assign* tab (shown).
5. **Click** the Current User hyperlink (shown). The corresponding fields populate with current user's department and name.
6. **Verify** or select Due Date.

7. **Click** *Submit* (shown).

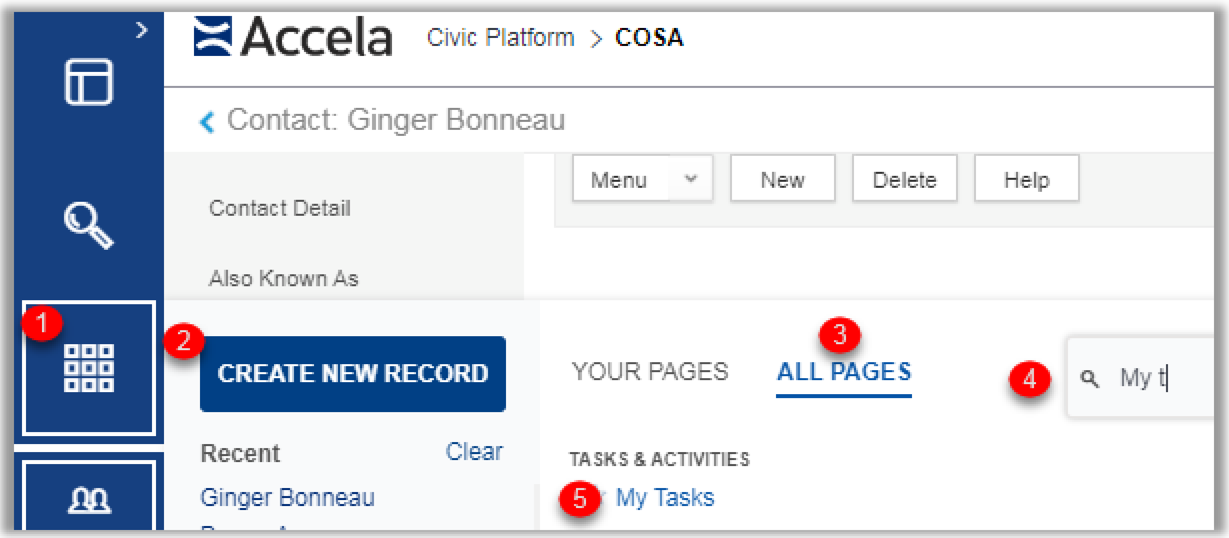
Additional Option for Assigning Tasks

Assigning Workflow Tasks or Inspections may be done singly or in bulk. Additional filters may be created. Contact DSD BuildSA support for information on creating filters: DSDBuildSASupport@sanantonio.gov.

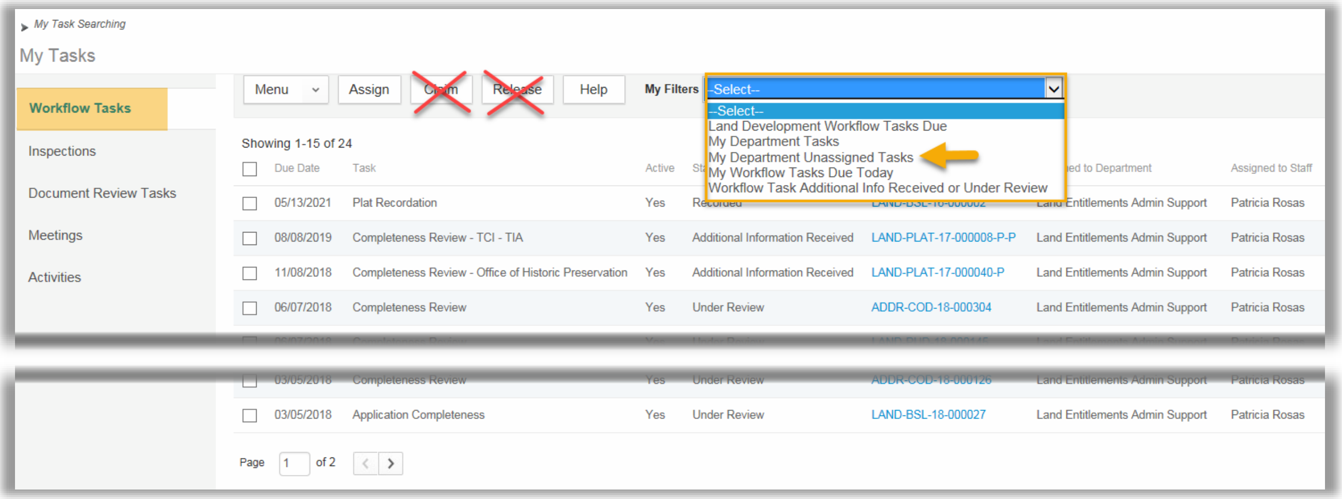
Assigning Workflow/Inspections Using My Tasks Page

❖ ***IMPORTANT: Use My Tasks page for Workflow Tasks and Inspections at this time. Do not use for Document Review Tasks, Meetings or Activities. Doing so may impact the workflow process of the record.***

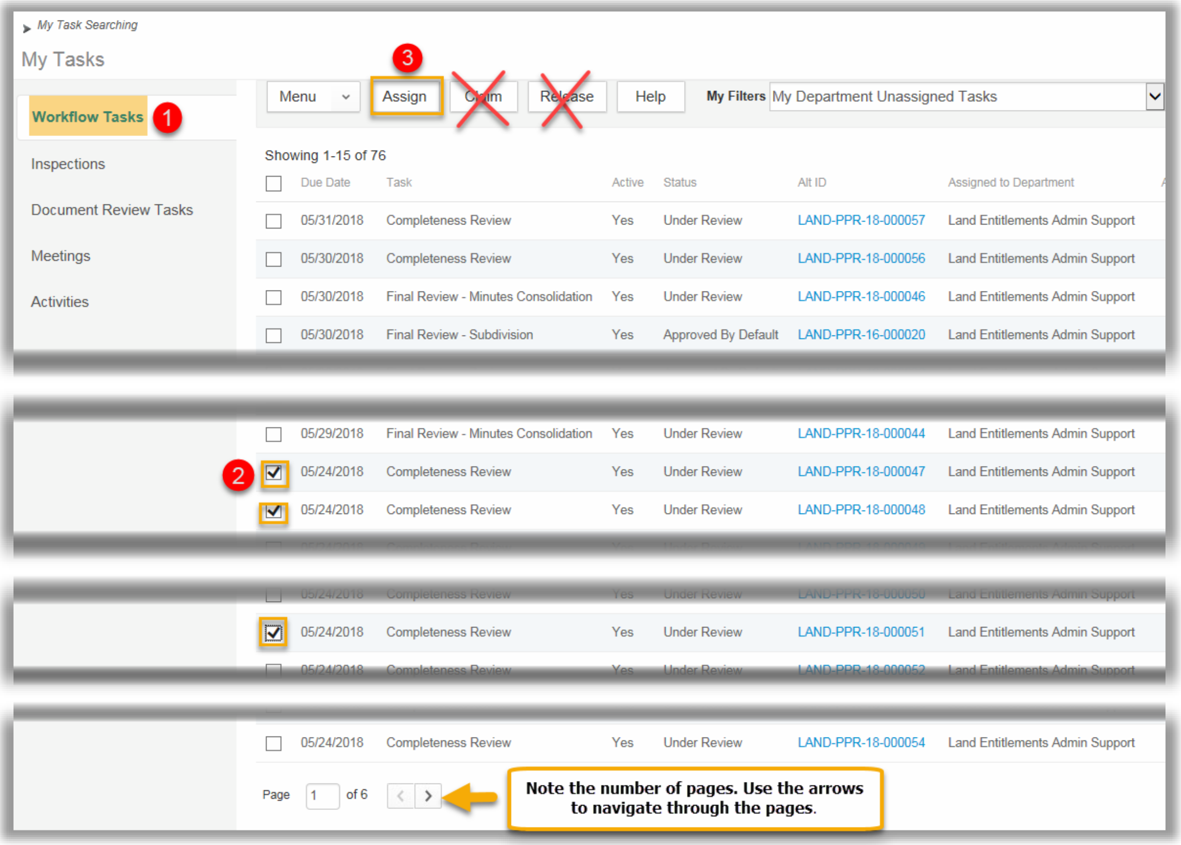
1. From the Launchpad, **click t**he All Pages icon (shown).
2. **Filter** for My Tasks page (shown). **Click** the My Tasks link.



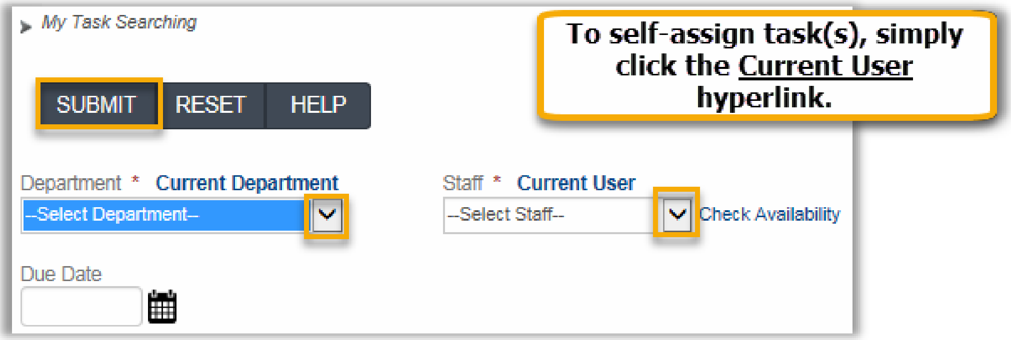
3. My Tasks page displays (shown). **Click** the Workflow Tasks Tab or the Inspections Tab (shown). **Filter** for My Department Unassigned Tasks (shown).



4. BuildSA displays all unassigned workflow tasks for your area. **Click** the box to the left of the Task(s) you wish to assign (shown). **Click** Assign (#3 shown). Tasks may be assigned singly or in bulk.



5. The Assignment Page displays (shown). **Click** the Department drop down menu to select a department. Next, **click** the Staff drop-down menu and select staff member.



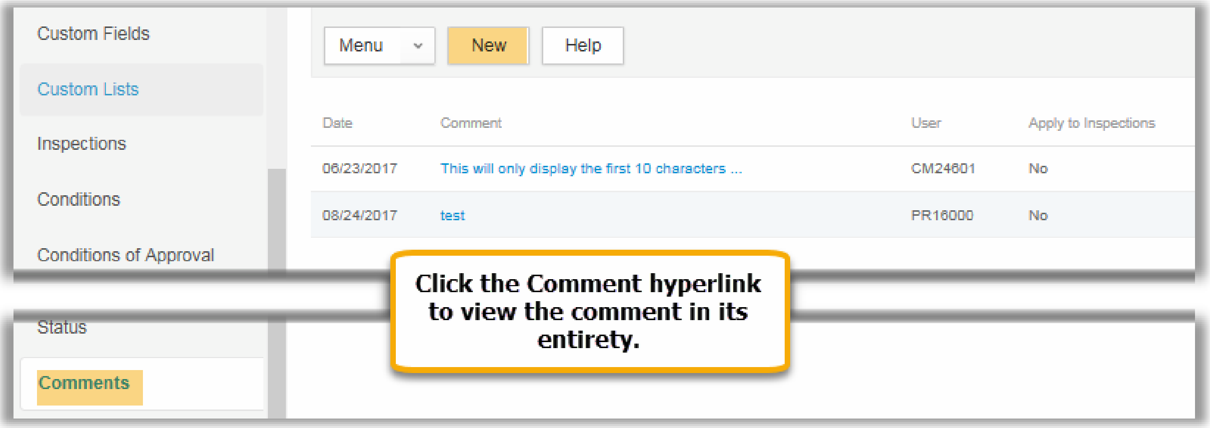
6. **Click** Submit (shown). BuildSA displays the message 1 task(s) assigned successfully (shown). The task does not display on the Unassigned Tasks list any longer since it is now assigned to a staff member.

Adding Comments to the Record

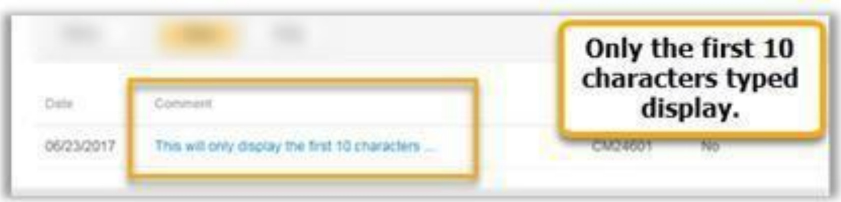
During this step in the workflow process, you can view comments typed by other reviewing staff and/or add additional comments to capture activity that occurred during a particular step in the process. Comments added to a record are **different** from comments added to a workflow task of the record. Once a workflow comment is created and added to a Record, it cannot be deleted. The comment becomes a part of the historical reference of the record. However; the Comments Tab let's an end-user typed **internal comments that the customer is not able to view.** As always, only professional comments should be typed since the comments are viewable by all BuildSA end-users.

Use the Comments Tab as a 'post-it' reminder. Date and initial your comments. Do not remove or edit any other user's comments.

1. **Click** the Comments Tab from the Record's navigation bar (shown).



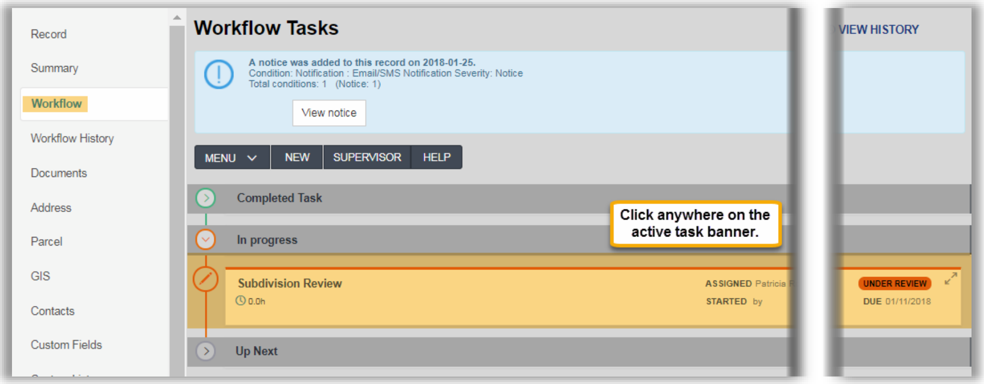
2. **Click** the hyperlink of the comment to view the full comment (shown).
   a. **To view** an existing comment, **click** the Comment hyperlink.
   b. **To edit** an existing comment, **click** the Comment hyperlink to display the Comment box with the full comment, **type** your changes. **Click** *Submit.*
   c. **To add** a new comment, **click** the *New* button (shown) to display a blank comment form, **type** new comment. **Click** *Submit*.



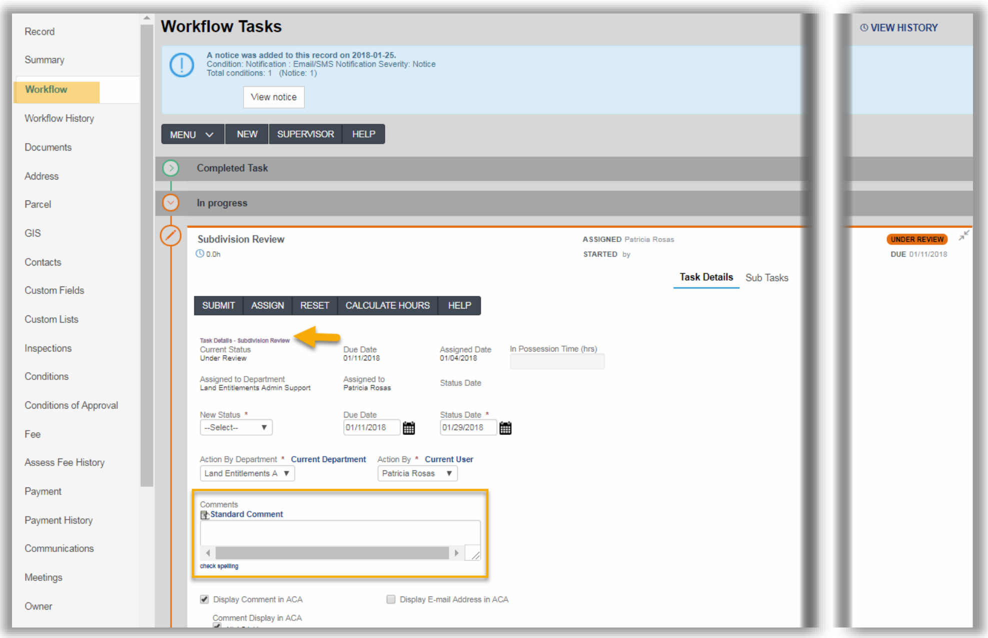
Adding Workflow Tasks Comments

Adding Comments to a workflow task is different than adding an internal comment to a record. **Comments to workflow tasks may be added while the task is being updated. The workflow task comments are added using the Workflow Tab. Workflow Task comments are viewable by the customer.** Comments may not be added to closed tasks—closed tasks are read-only. To add a comment to a task while updating the task, follow the steps below:

1. From the Record's navigation bar, **click** the Workflow Tab.
2. **Click** the active Task banner (shown).



3. The Task Details page displays (shown). **Type** comments in the Standard Comments Field (shown).



❖ ***NOTE: The comments typed in the Standard Comments section of the task are displayable to the Customer when the request is submitted through the Online Portal. This is controlled by the***

directly under the Standard Comments box.

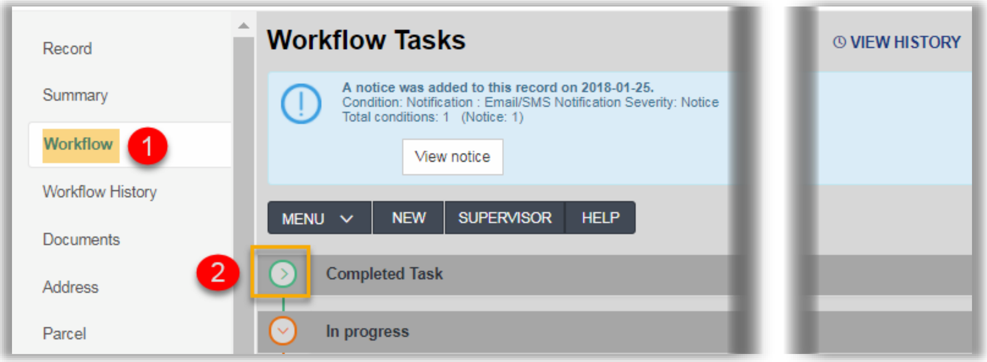
4. **Click** *Submit* (shown).

Viewing Workflow Tasks Comments

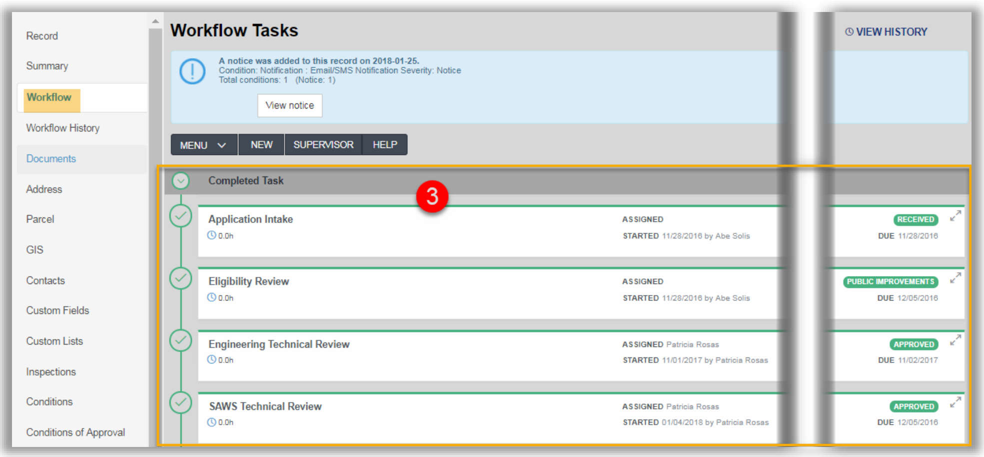
It is helpful to review comments from previously closed workflow tasks while conducting your division or agency reviews. Comments may contain information to help the user with the current task.

To view previously closed task comments

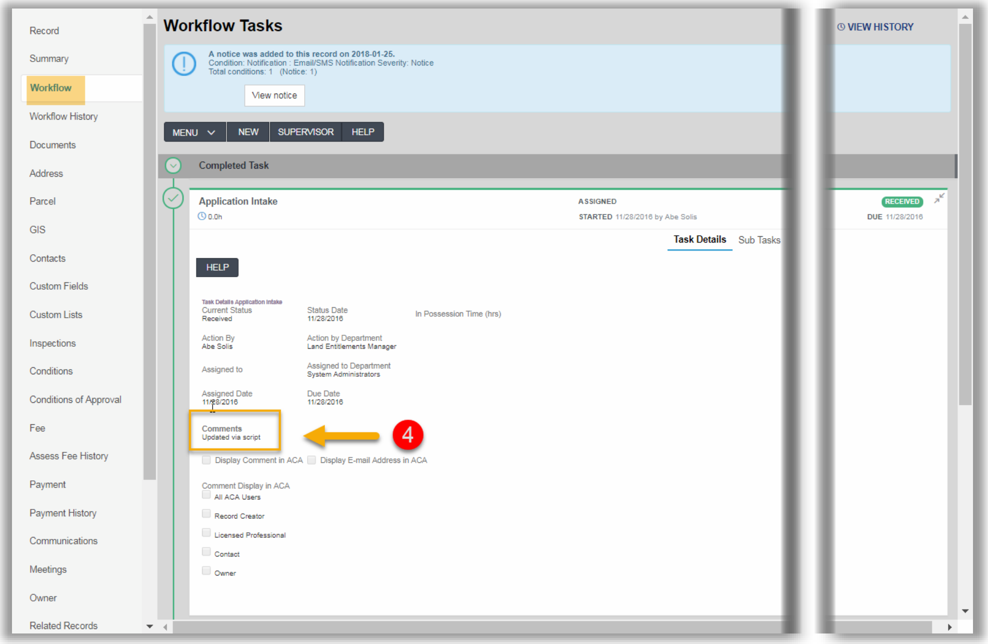
1. From the Record's navigation bar, **click** the Workflow Tab (#1 shown).



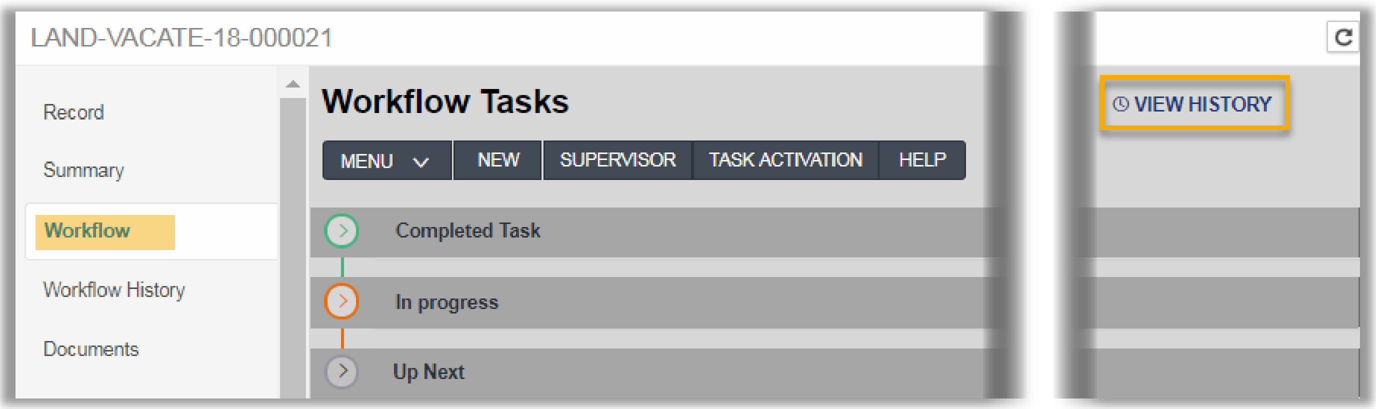
2. **Click** the green arrow to the left of the Completed Task (# 2 shown).
3. All completed tasks for that particular task display (# 3 shown).



4. **Click** the banner of any completed task to see Comments (#4). Comment displays under the Comments heading.

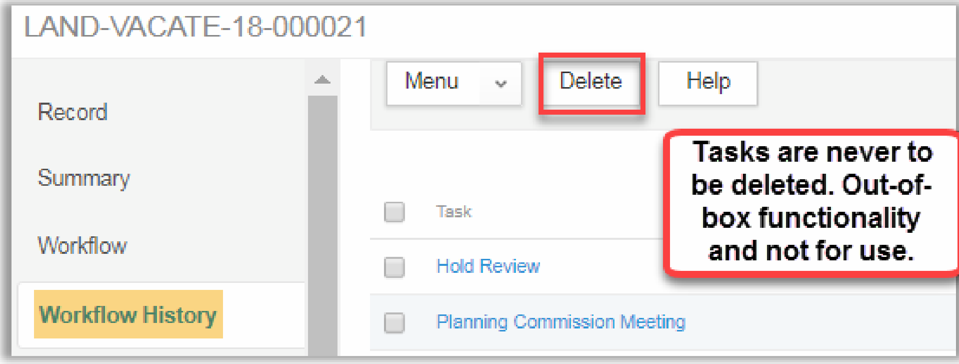


Alternative Methods to View Workflow History Comments



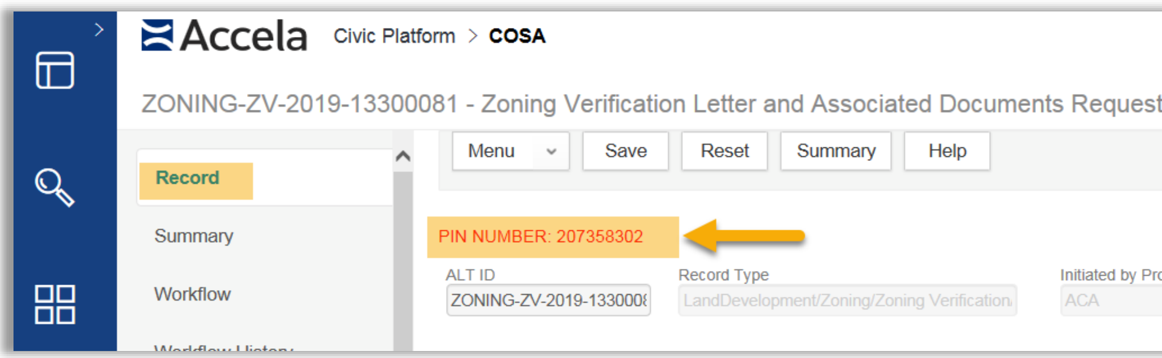
1. **Click** the **View History** hyperlink located on the upper right-hand side of the Workflow Tasks page (shown). Clicking the hyperlinks opens the Workflow History page displaying a list of all Record tasks.

2. **Click** the Task title hyperlink to open the Task page and view comments.



PIN Numbers

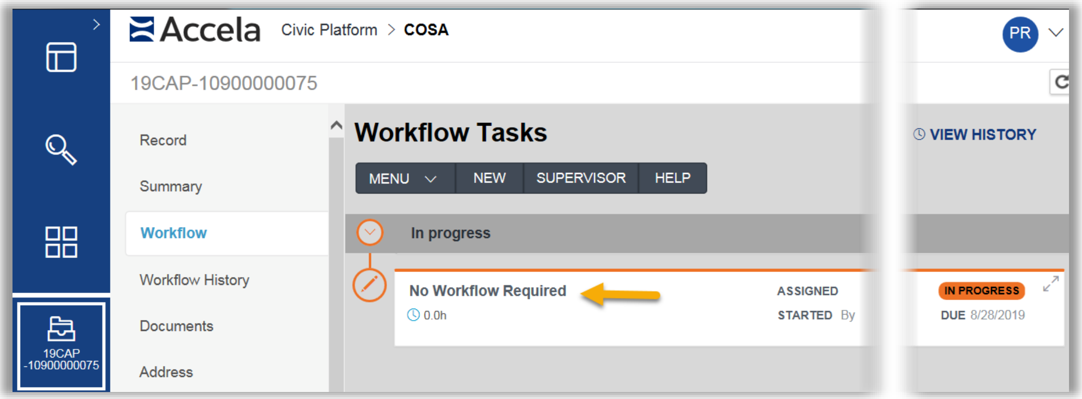
The PIN number is a system generated number for use by staff to provide to the customer, enabling him to *claim* the record in his Online Portal account (ACA or Citizen Access). Find the PIN number by using the <u>Record Tab</u> on the Record's navigation bar (shown). Before releasing a PIN Number to a customer, please view IB300 for stipulations. If you are unfamiliar with the PIN Number process, please see your supervisor or contact the DSD Call Center.



Example: If a customer calls stating that they cannot see their application on their online portal-for whatever reason-staff can give the applicant/user the ability to have full control of the record with this pin. The customer then types this pin in their portal account and *claims* the record.

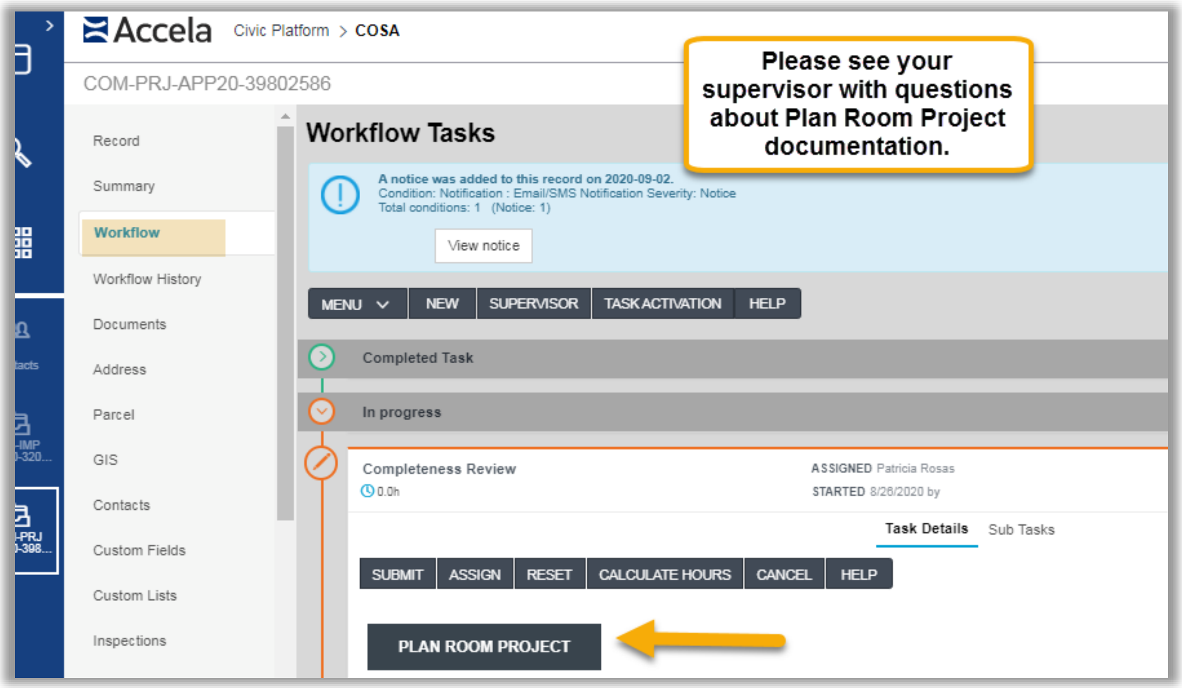
A claimed PIN number displays as a non-record with the CAP record ID number (shown). These non-records are simply a means of capturing activity within BuildSA. Note the No Workflow Required banner (shown).

The CAP number does not have any relevance to the workflow process, other than the CAP number is created to capture the customer's request. Should a customer call DSD requesting information, the customer gives staff the **original record number** to retrieve information.



Documents

Note: ePermitHub Digital Plan Room documentation/EDR information is not included in this guide. Please see your supervisor with questions.

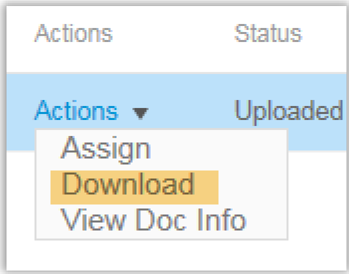


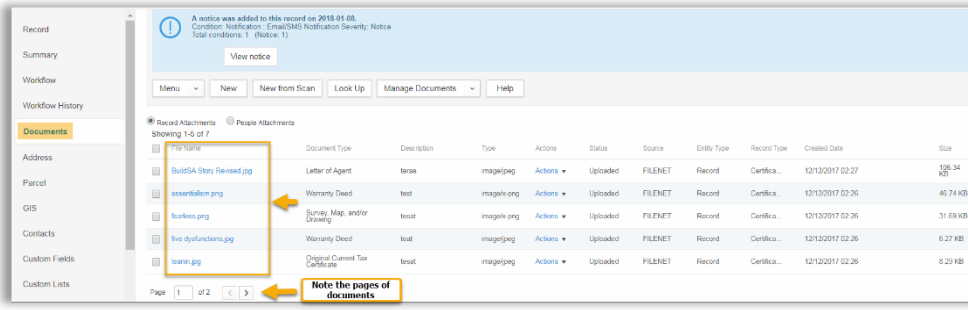
The Documents Tab of the Record's navigation bar lets you view all documentation to verify the required information, based on the type of document indicated, is received. Documentation is also uploaded to a record using the Documents Tab.

- ***NOTE: All documents received are to be scanned, saved to a local drive and uploaded to the Record using BuildSA back-office and based on the document types above.***

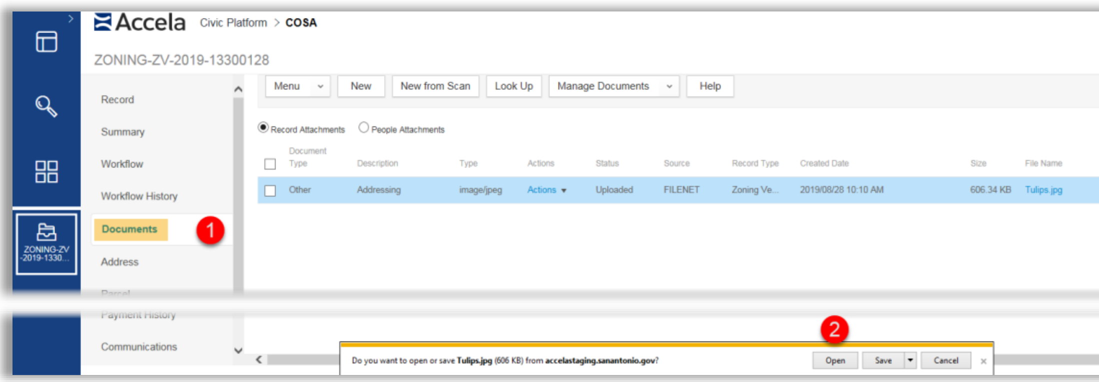
Viewing Documentation

1. From the Record's navigation bar, **click** the Documents Tab (shown). **Click** the File Name hyperlink to open the document or click the Actions drop-down menu arrow to select Download (shown).





2. Message displays to open the document at the bottom of screen (shown).



3. **Click** Open. The Open menu displays (shown). **Click** *Open* (shown).

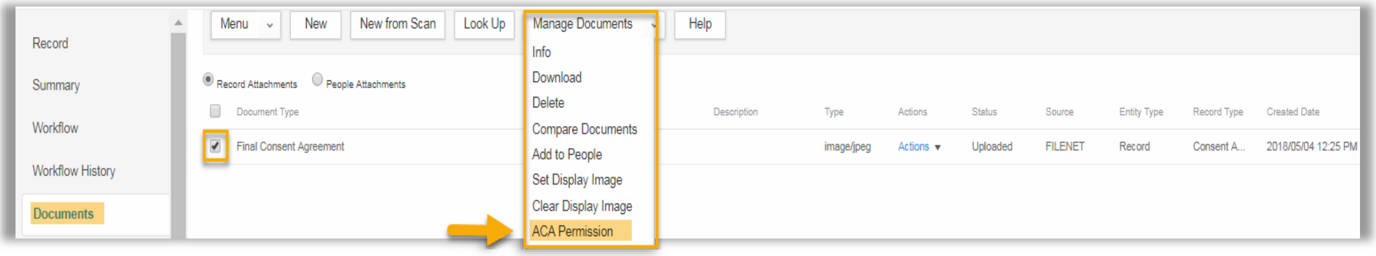
Making Documents Visible to the Applicant

Periodically, customers may not be able to view record documentation through their online portal accounts. Follow the steps below to make documentation visible to a customer.

To make documents visible to the applicant

1. **Retrieve** the record.

2. **Scroll** to the Documents Tab (shown).
3. **Click** the box to the left of the document (shown).



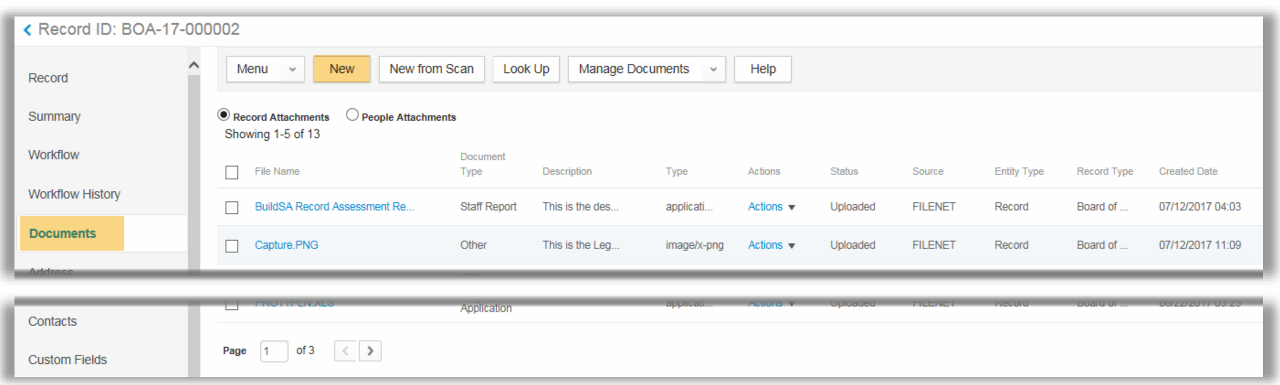
4. From the Manage Documents drop-down menu, **click** to select ACA Permission (shown).
5. The Viewable Options page displays (shown). Note options.
6. **Click** Submit.

IMPORTANT: Do NOT Set Deletable in ACA permission to YES until after careful consideration. See your Supervisor with any questions/concerns.

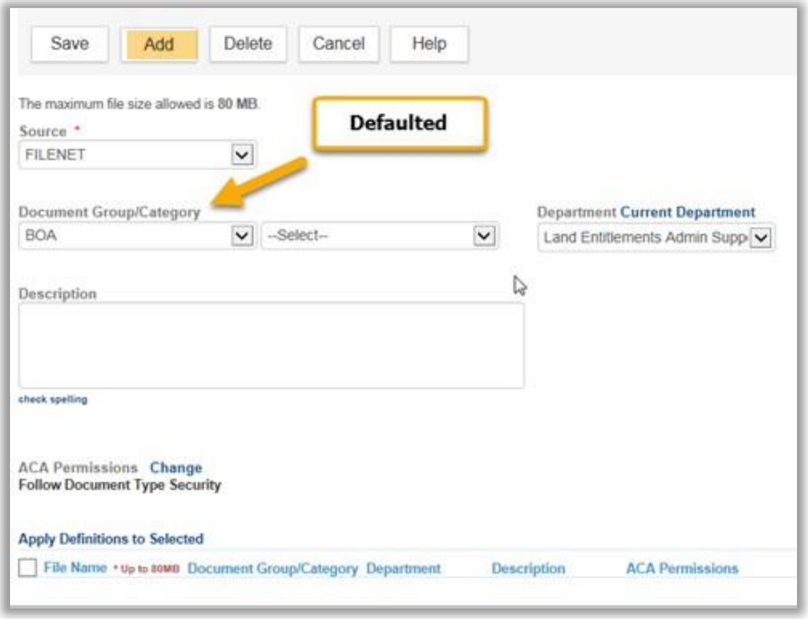
Uploading Documentation

To upload documentation to a Record

1. From the Record's navigation bar, **click** the Document Tab (shown).

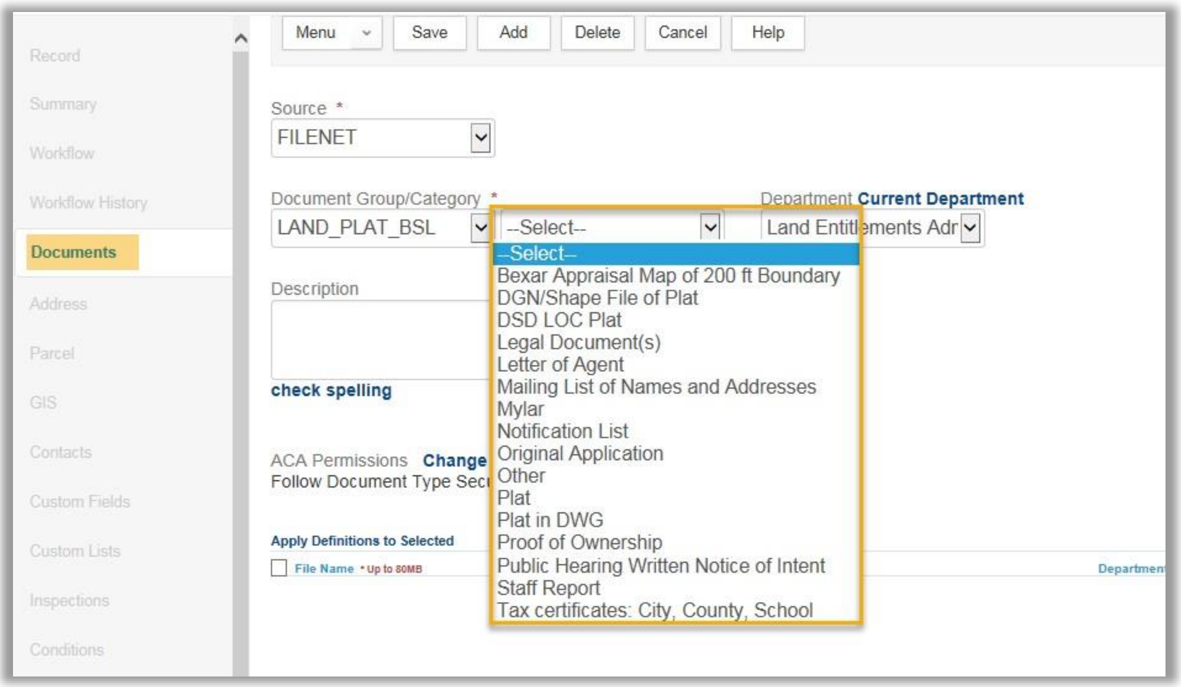


2. **Click** *New* to add documentation (shown). The File Upload page displays (shown.)



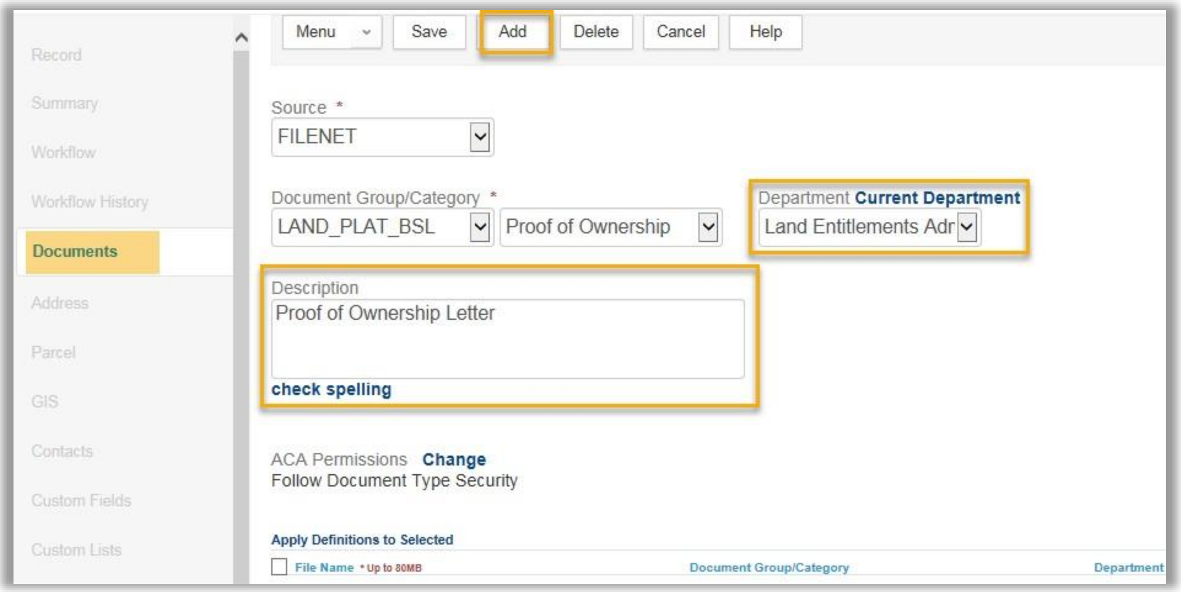
❖ ***NOTE: The Document Group defaults to an Application Record Key. The example shown here is a Board of Adjustment application. Note the record key is BOA. The Record Key controls the types of documents the Category displays. Verify the Document Group is the correct group for the record type you are working with.***

3. **Scroll** to the Select drop-down menu (shown). **Click** to select the document you are uploading.

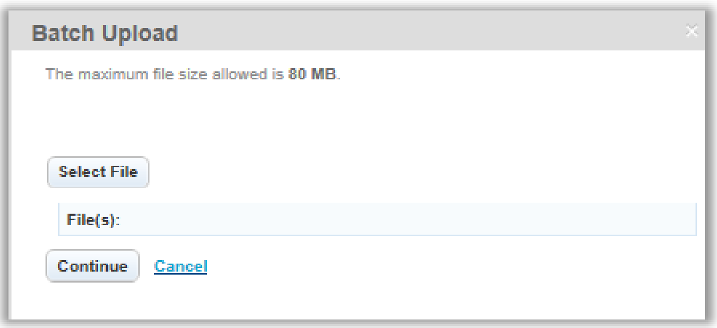


4. **Verify** the Department (shown).

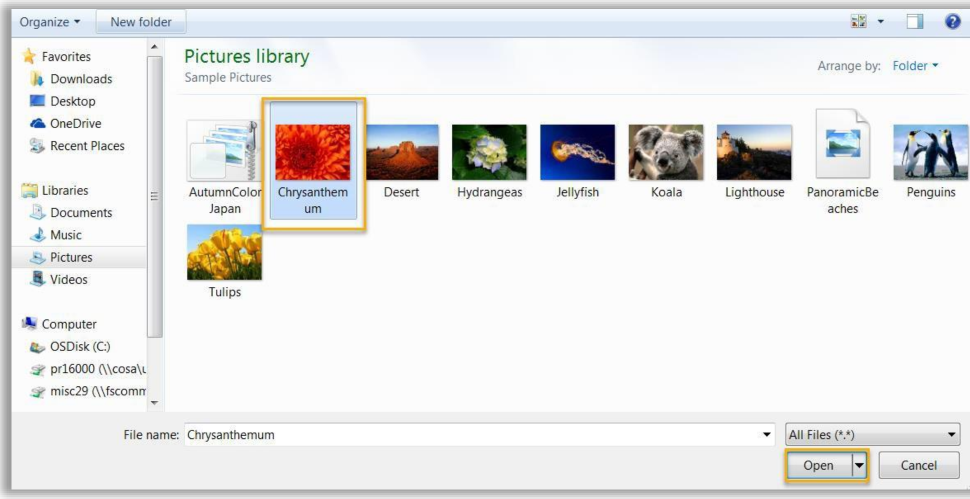
5. **Type** a brief description in the free text field box (shown).
6. **Click** Add (shown).



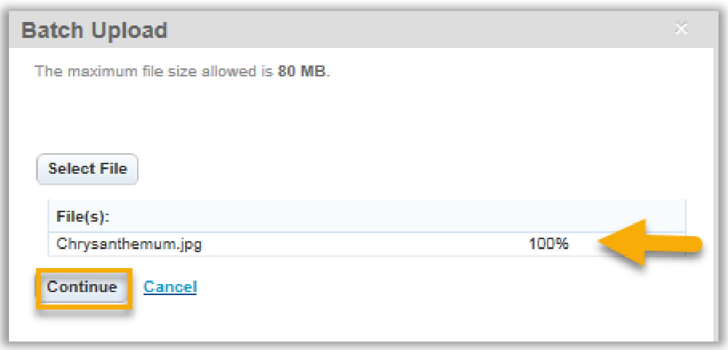
7. The Batch Upload prompt displays (shown). Click Select File (shown).



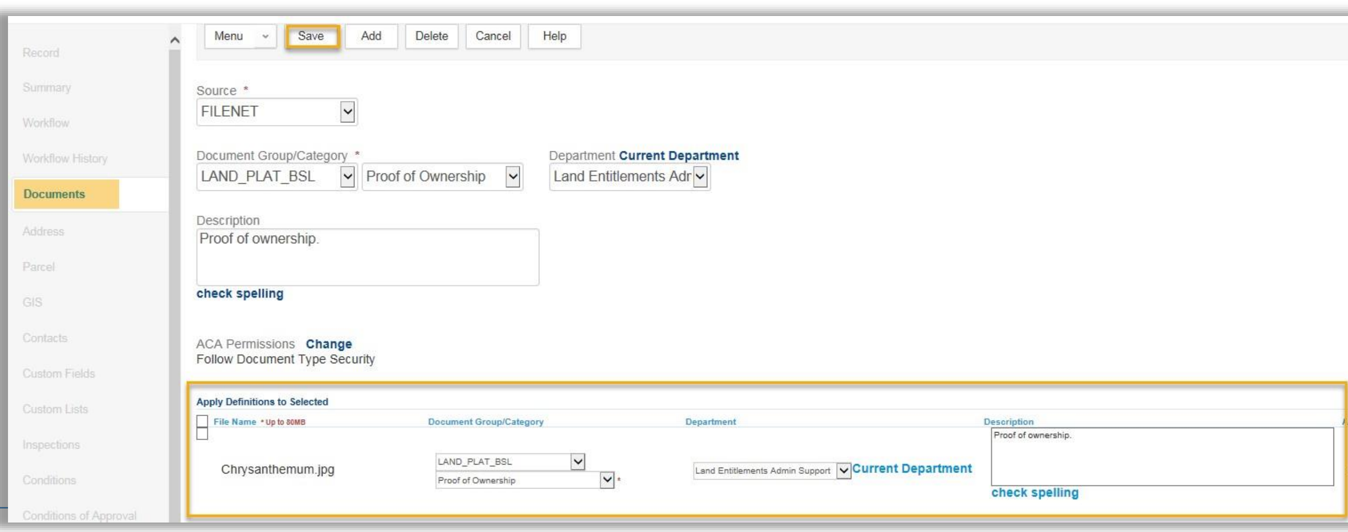
8. The *Windows Explorer* window opens (shown).



9. **Navigate** to the local drive where the document(s) are saved.
10. **Select** the file(s) to upload.
11. **Click** Open (shown).



12. The Batch Upload displays once again. **Verify** the File(s) is uploaded. **Click** Continue (shown).
13. The uploaded document(s) display at the bottom of the File Upload form (shown).

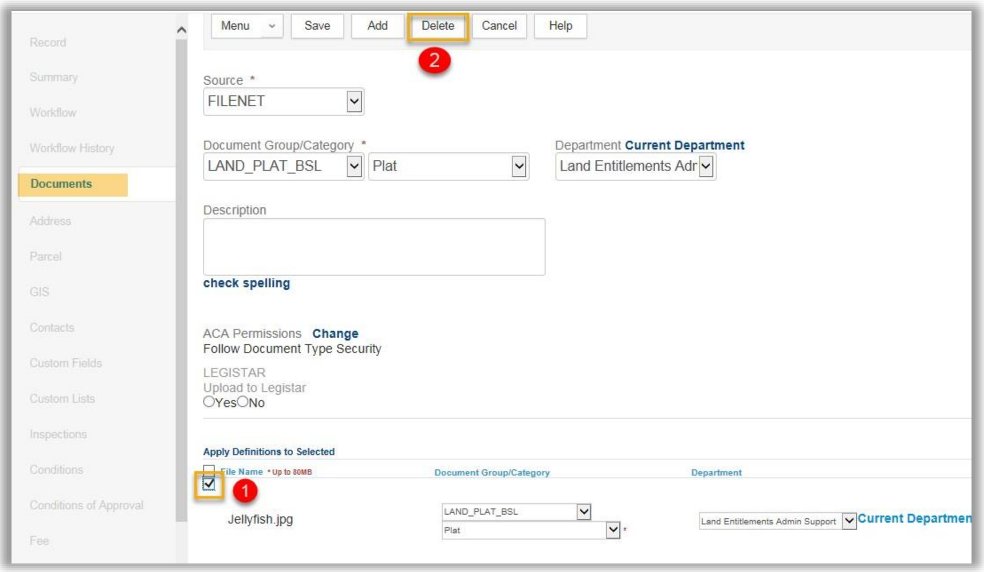


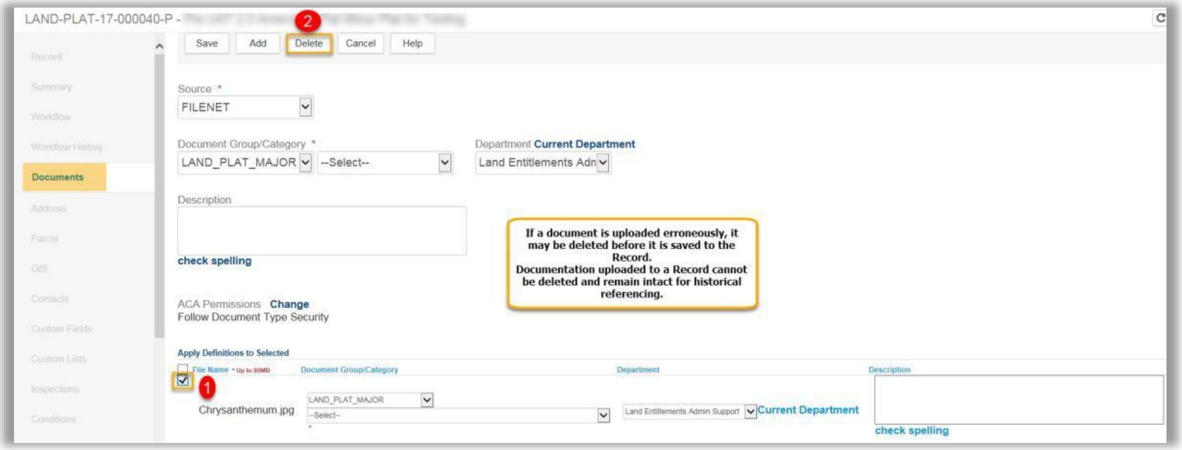
14. **Verify** the Document Group and Category (shown).
15. **Verify** the Department (shown) and the Description (shown).
16. **Click Save.** Documentation is uploaded and may be viewed using the Record's Navigation Tab.
17. **Repeat** steps for all file(s) as necessary.

Documents are not to be deleted under any circumstances

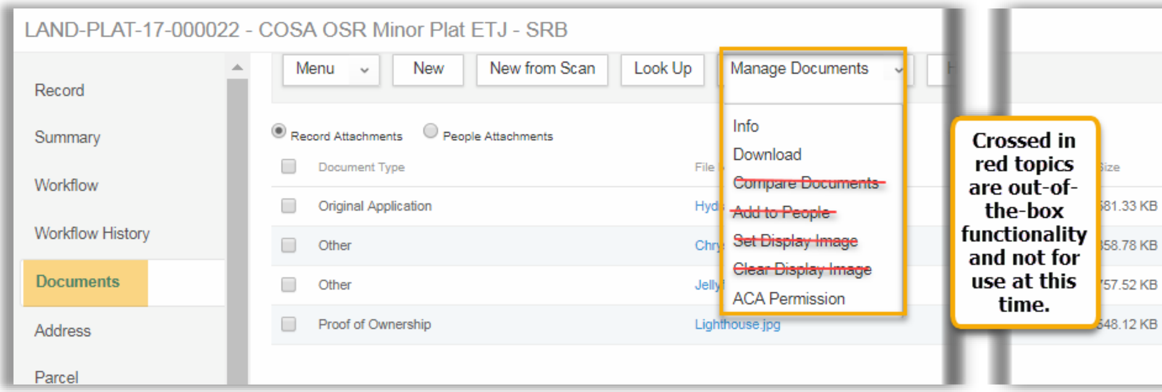
While in the *Adding a New File* mode, if a file is uploaded (added) erroneously, it may be deleted but never after the Save button is clicked. Follow the steps below:

1. **Click** the check box directly to the left of the file you wish to delete (shown).
2. **Click** the *Delete* button located on the top tool bar (shown). The file is deleted.

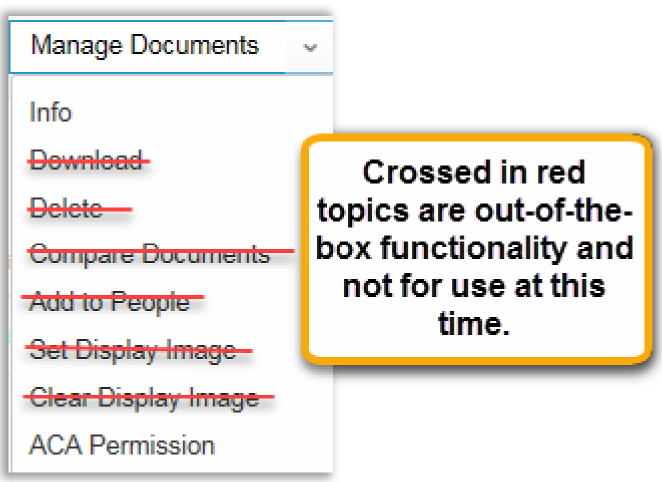




❖ ***IMPORTANT: Delete documentation uploaded erroneously only before Save is clicked. After the document(s) is saved to the Record, it is kept intact for historical referencing.***



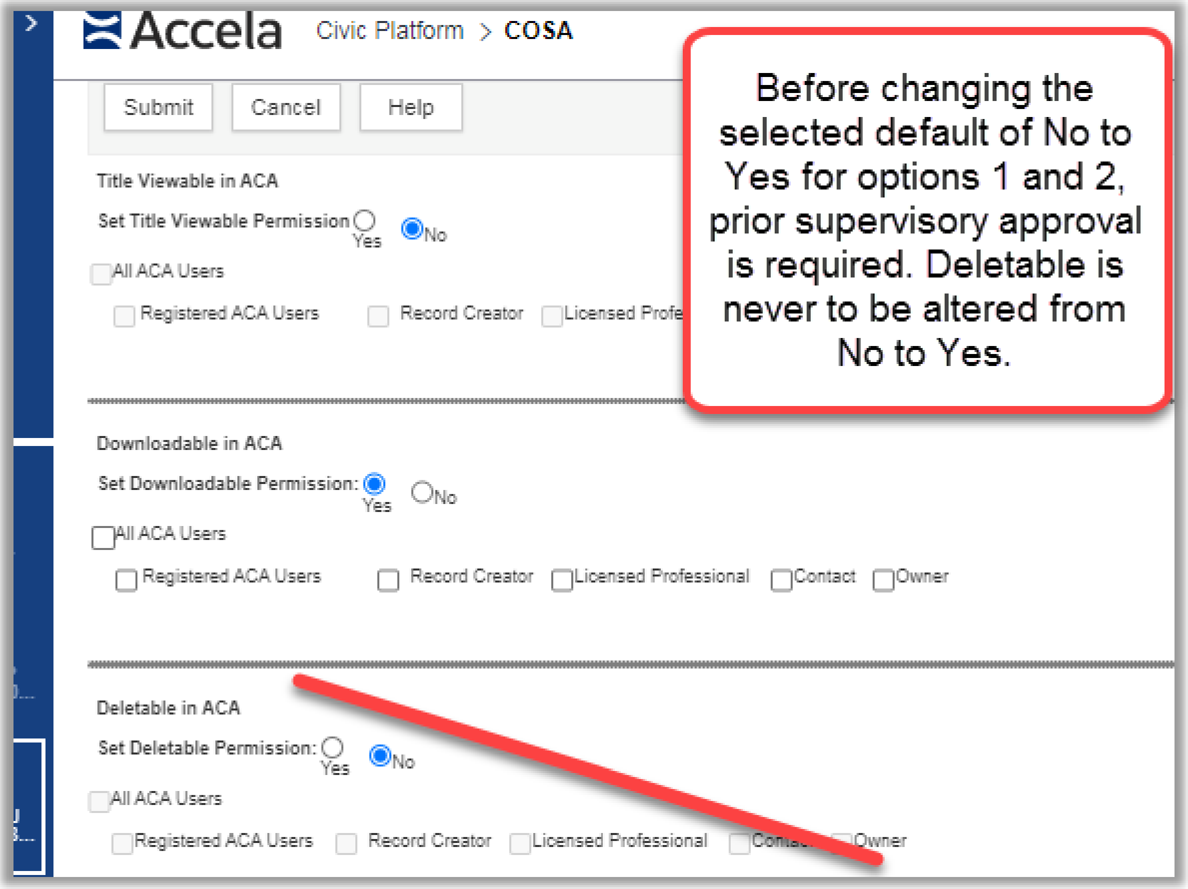
Manage Documents Info hyperlink displays general document information. ACA Permissions may be set from this link (shown).



To change ACA Permission

Before changing the ACA Permission from the default No to Yes, ensure you have supervisory approval.

1. After ACA Permission is selected, the ACA Permission page displays (shown).



2. After receiving supervisory approval, change selection from the default No to Yes. Deletable in ACA option is never changed from No to Yes.

Sorting Option in Documents Tab

End-users have an option to sort documentation for easy viewing.

- Hover over the Column Headings until an underline beneath the headings displays.
- Next, click the Column Heading to sort in ascending/descending order.

To sort documentation

1. **Click** the Title of a column, example shows Document Type and File Name (shown). After clicking on a Title, an underline displays.

❖ ***NOTE: The sorting option is available on other pages as well. To use, hover over the Column titles of a page and if an underline displays, click to sort Ascending or Descending option.***

System Generated Emails

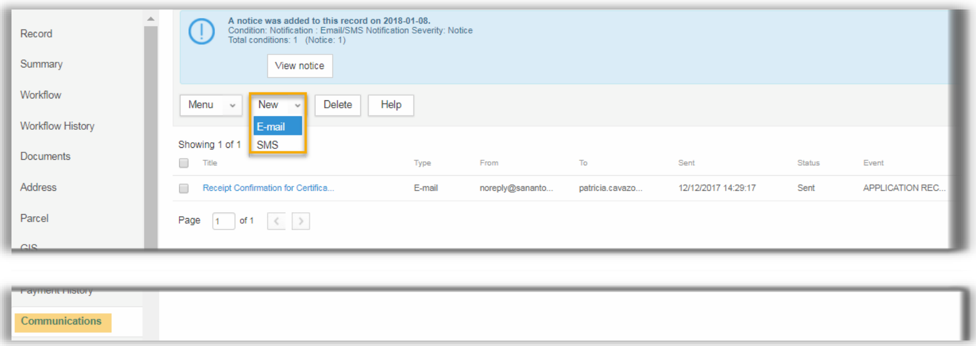
Creating Emails Using BuildSA Back-Office

BuildSA enables the user to send emails with the right content and to the right people. Clicking the Communications Tab located on the Record's navigation bar makes it effortless for users to communicate with the customer. Many emails are also system-generated. View all emails using the Communications Tab. **Emails are never to be deleted.**

Creating Emails

1. **Retrieve** the record.

2. From the record's navigation bar, **click** on the Communications Tab (shown).

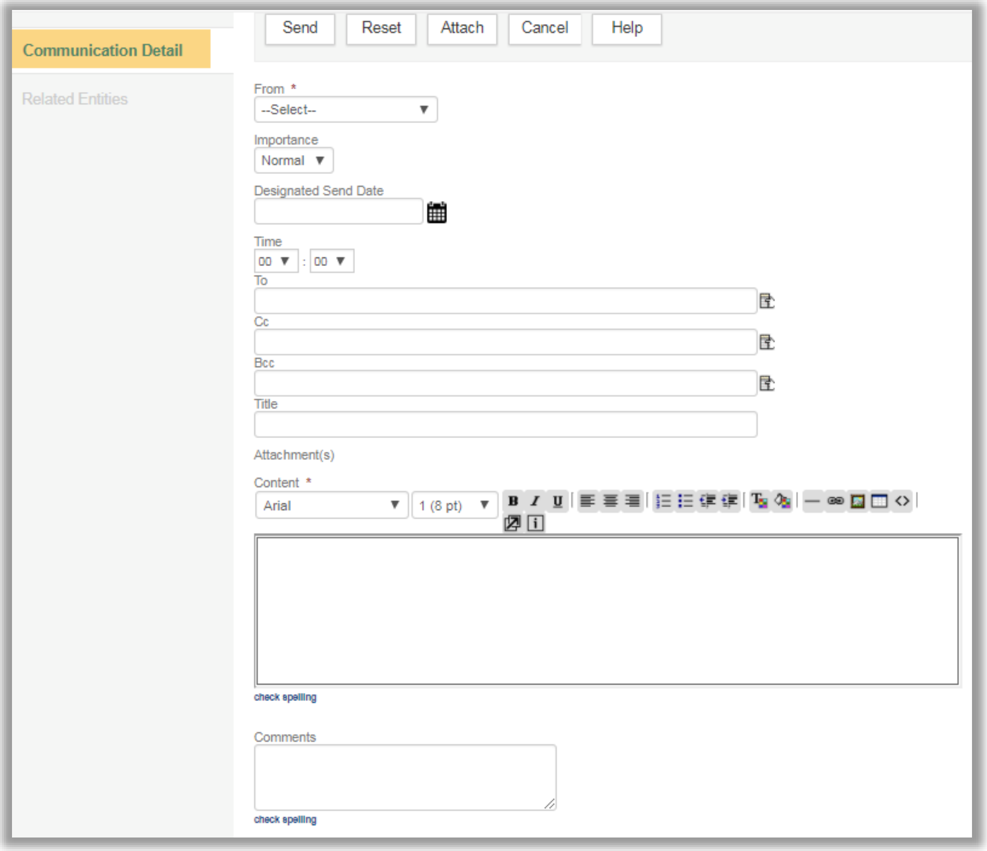


3. **Click** the *New* button drop-down menu (shown).

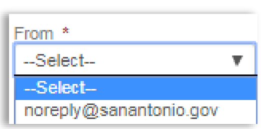
4. **Click** to select *Email*. COSA is not using the Short Message Service (SMS) option at this time.

5. The Communication Detail page displays (shown).

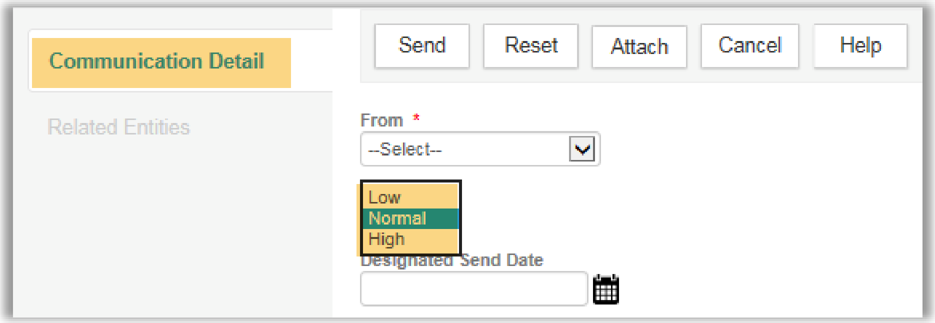
Note: If creating an email with attachments, use Internet Explorer. Please contact dsdbuildsasupport@sanantonio.gov for help or questions.

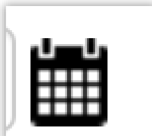


6. **Complete** required fields. Required fields are identifiable by a **red** (*) asterisk.
7. **Use** the drop-down menu arrow to select the *From* email address (shown).

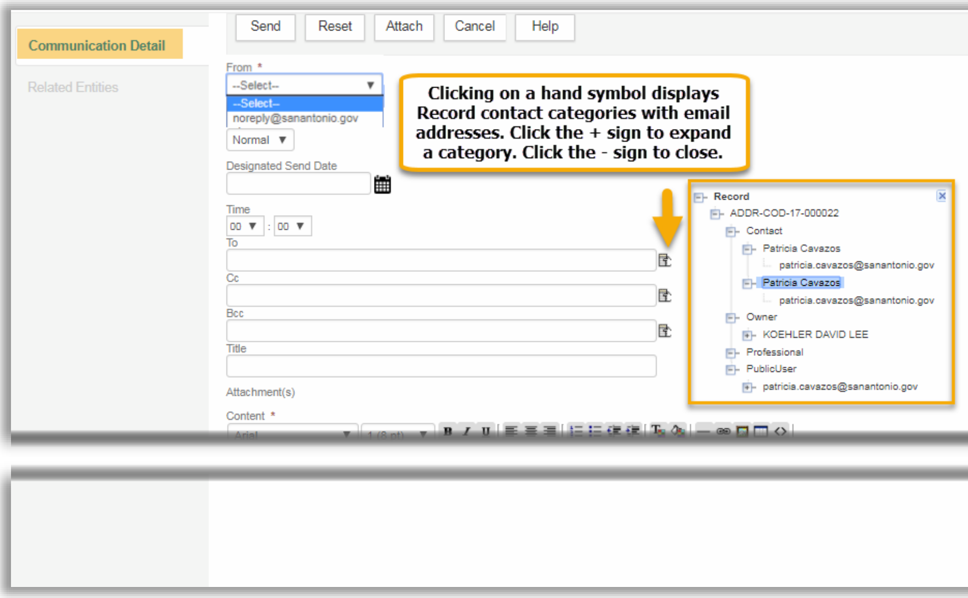


8. **Select** the level of *Importance* of the email by **clicking** on the *Importance* drop-down menu, as applicable (shown). This is not a required field.

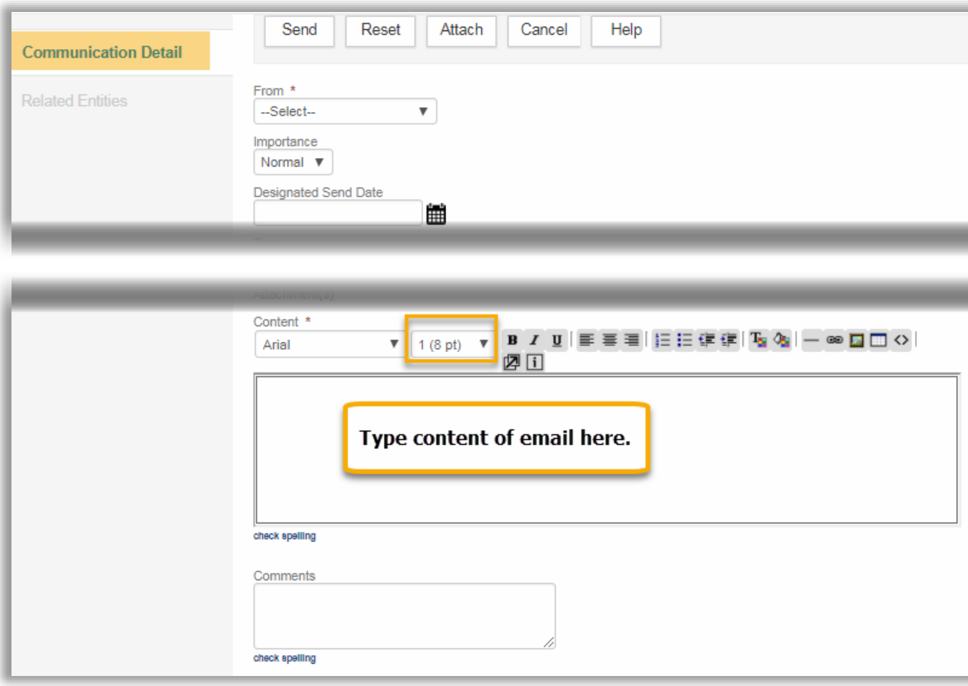


9. **Use** the *Calendar* icon  to select a date for the *Designated Send Date* field.
10. **Select** a *Time* for your email, as applicable, from the *Time* field drop-down menu (shown).

11. **Type** or select the receiver’s email address.

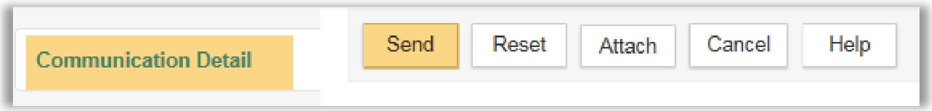


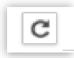
12. **Type** or select the email address of any copies and/or blind copies recipients.
13. **Type** the subject of the email in the *Title* field. This is an **important** step for easy identification of emails as the Record progresses.
14. **Attach** documentation, as applicable (steps for attaching documentation follow).
15. **Type** the *Content* of your email message. This is a required field (shown). BuildSA defaults to 8pt size font. **Change** font size from 8pt to 12 pt. Use drop-down menu to select size (shown).

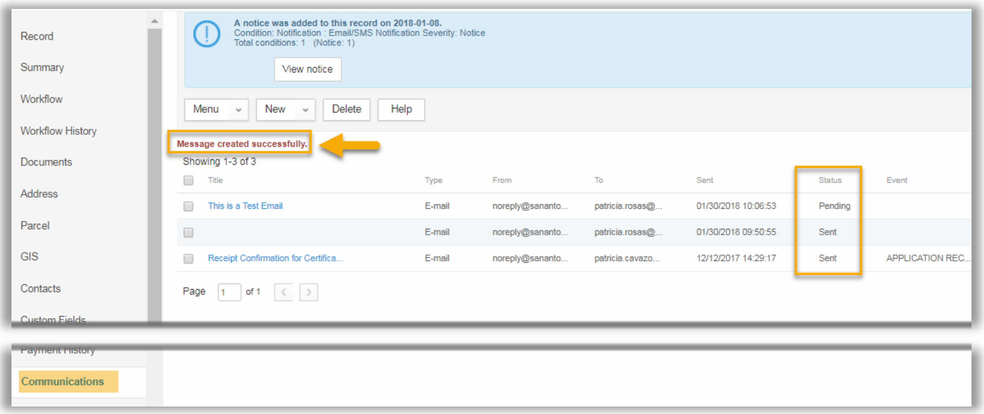


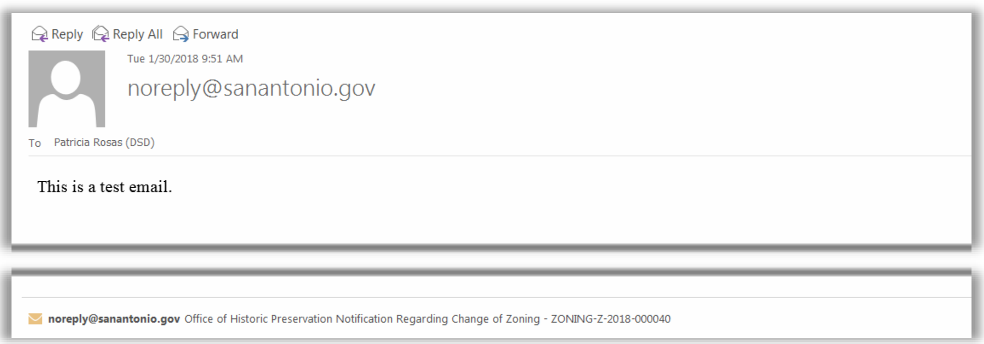
16. The Comments typed in the Comments box on this page are not visible to the customer and do not display in BuildSA. This is an out-of-the-box functionality and not required.

17. **Click** the *Send* button located on the top menu bar when completed (shown).



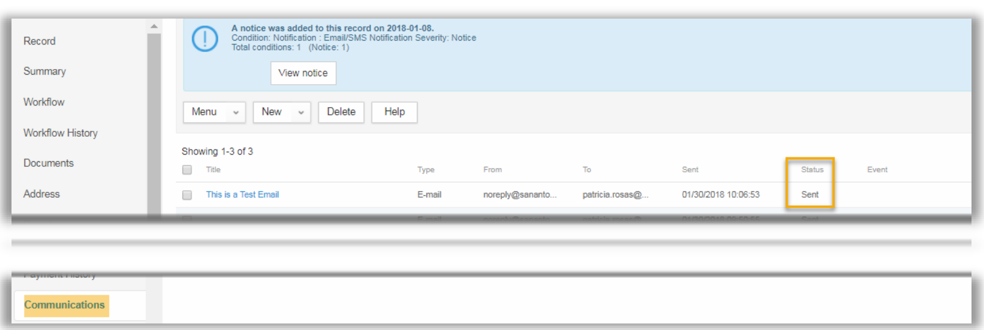
18. The email is sent to customer (shown). Notice the Status column lists the status of the email as Pending. BuildSA displays the message *Message created successfully* (shown). **Click** the refresh button  .





Example of email as seen in recipient's inbox.

19. After clicking the refresh button, status of email changes to Sent (shown).



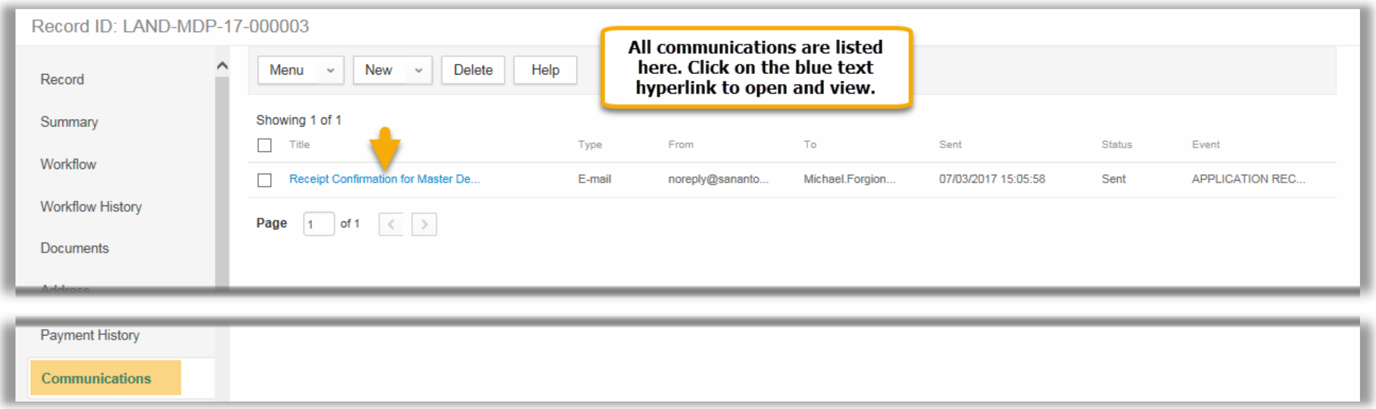
Accessing, Viewing, Forwarding and Attaching Documents to E-mails

1. **Retrieve** the record.

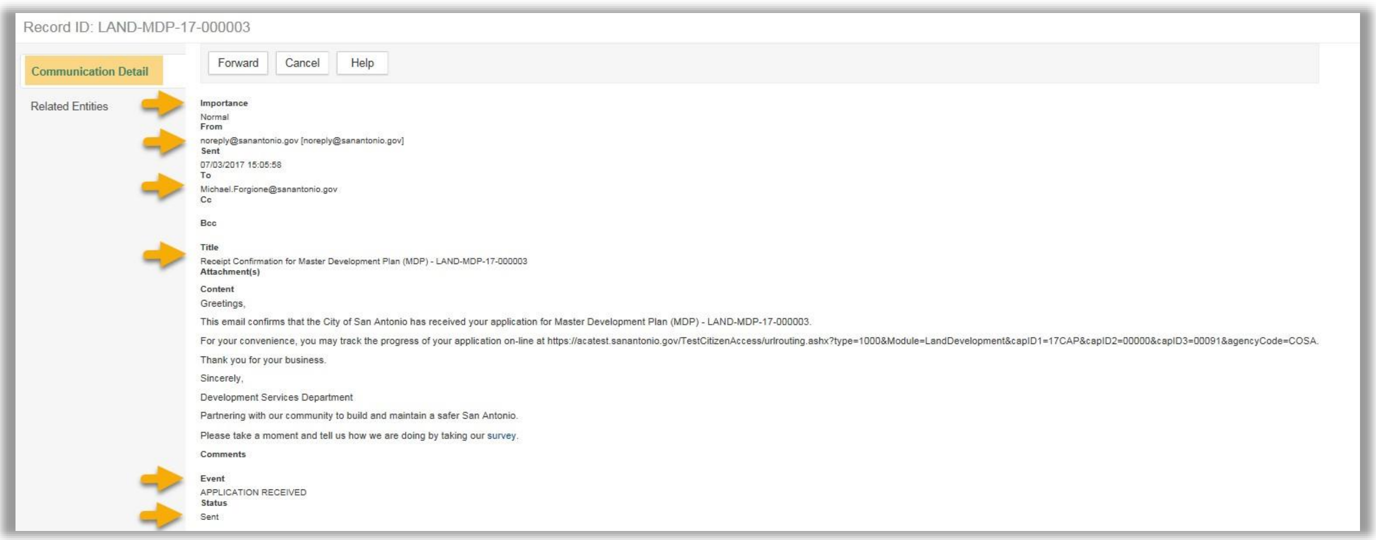
2. From the record's navigation bar, **click** the Communications Tab (shown).

3. A list of all communications generated for the record appears (shown).

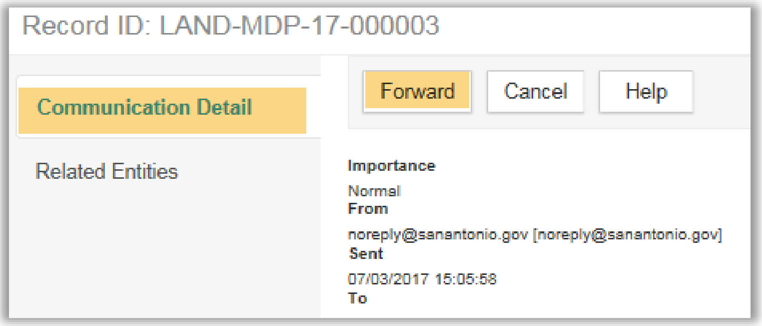
4. **Click** the hyperlink of document to view (shown).



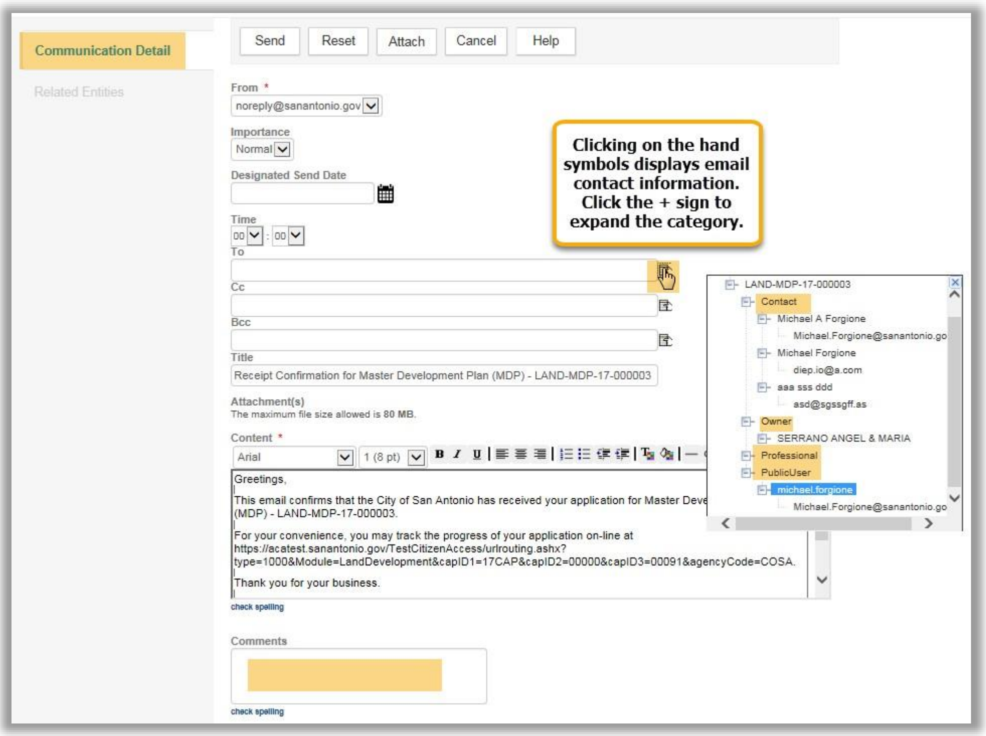
5. The Communication Detail page displays. Note the information available on the page (shown).



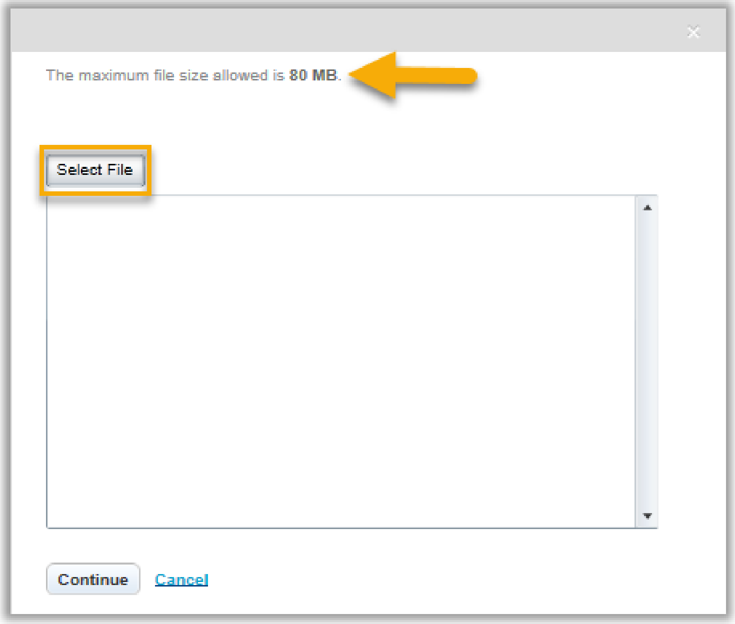
6. To forward an email **click** the *Forward* button (shown).



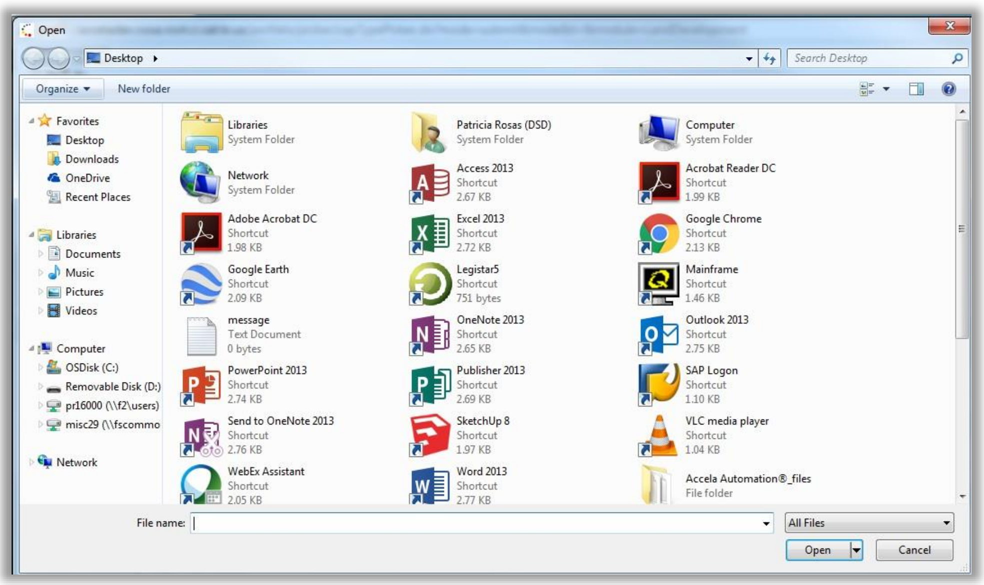
7. The template for the email displays. **Complete** the fields, as applicable (shown).
    - The Comments text box is an out-of-the-box functionality.
    - **Attach** any documentation to your email, as applicable. Instructions on attachments follow.



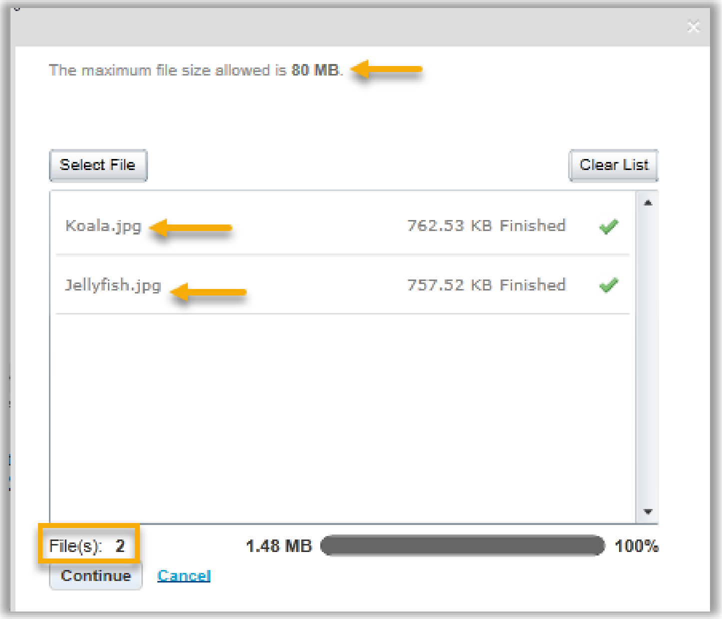
8. To attach documentation to your email, **click** on the *Attach* button (shown).



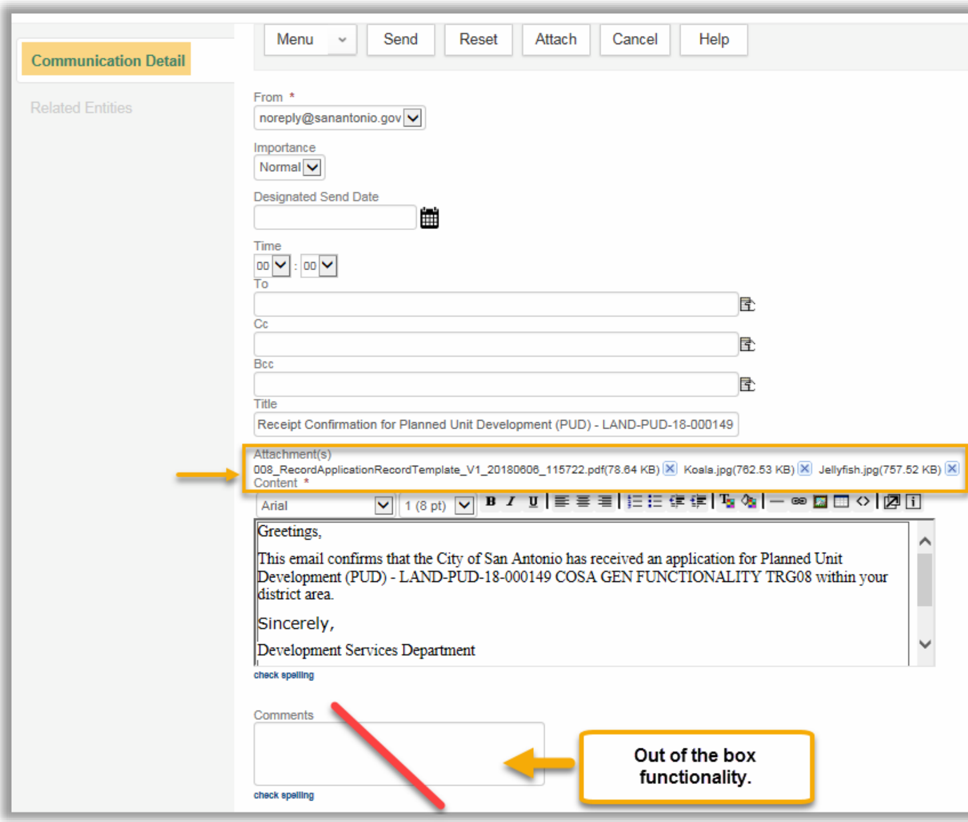
9. The *Windows Explorer* window displays (shown).



10. **Locate** the file(s) you want to attach to the email.
    - **Select** the file by double-clicking on the file itself; or, select the file and then click on the *Open* button (shown above).
    - **Verify** the file is attached to your email.

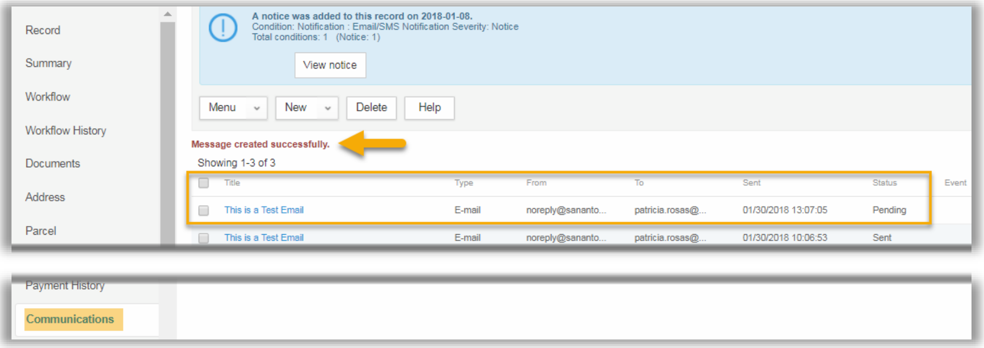


11. **Click** Continue. **Verify** the Attachments uploaded (shown).



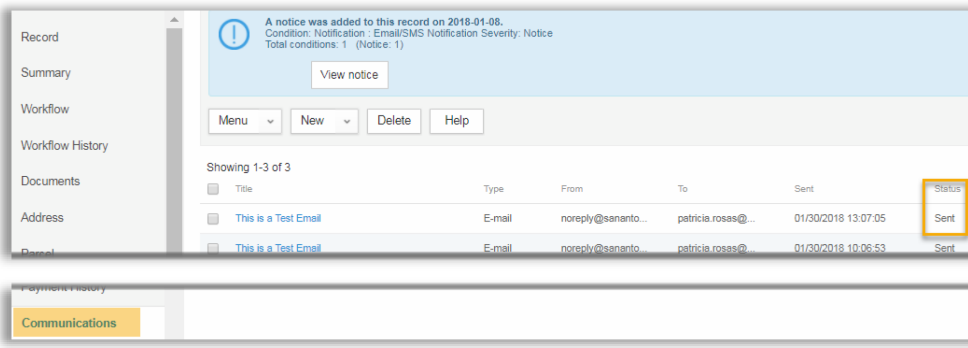
10. **Click** the *Send* button (shown).

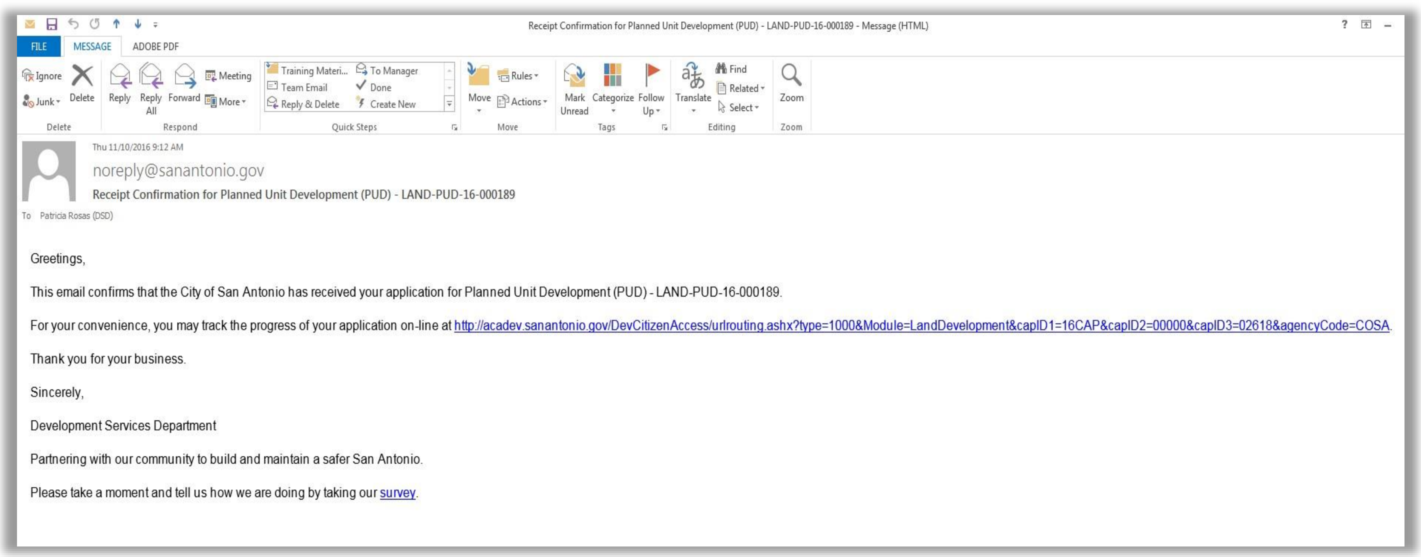
11. BuildSA generates a *Message created successfully* prompt after sending your email (shown). Notice the Status Column lists the status of the email as *Pending* (shown).



12. **Click** the refresh button located at the top right of the BuildSA desktop .

13. After clicking the refresh button, the status of the email changes to *Sent* (shown).

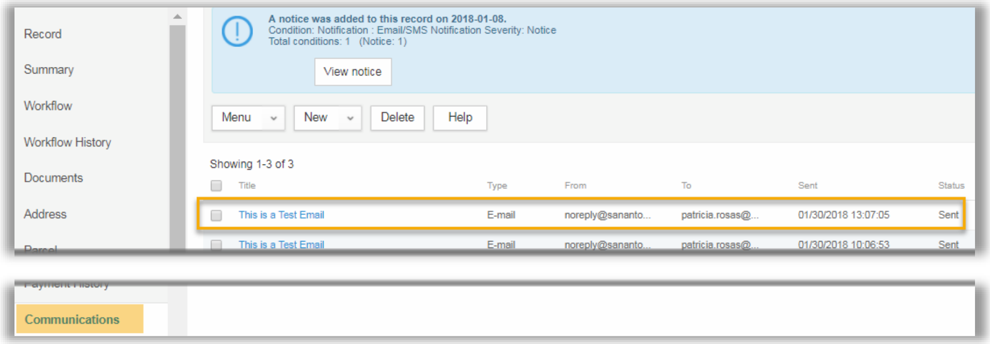




Example of an email generated from BuildSA back-office

14. After the email is sent, the Communication page displays (shown). The email generated is now

listed as a part of the record. The latest email sent appears at the top of the list.



Related Records

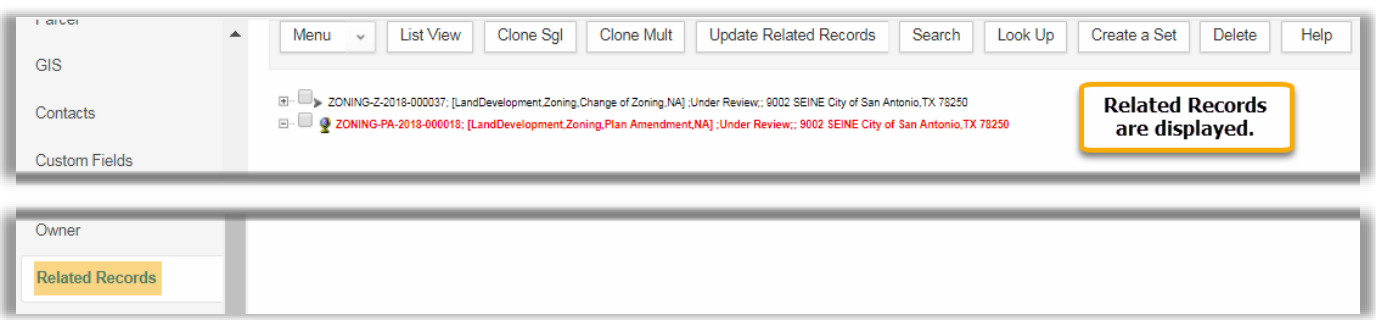
Related records have information in common and are related to each other in parent/child relationships. Instruction on the Related Records process for each record-type is addressed during **record-specific training.**

- ***IMPORTANT: Relating Records (parent/child, child/parent) may impact the workflow process of a record. If you have questions about the related records process for a specific record type, please contact your supervisor.***

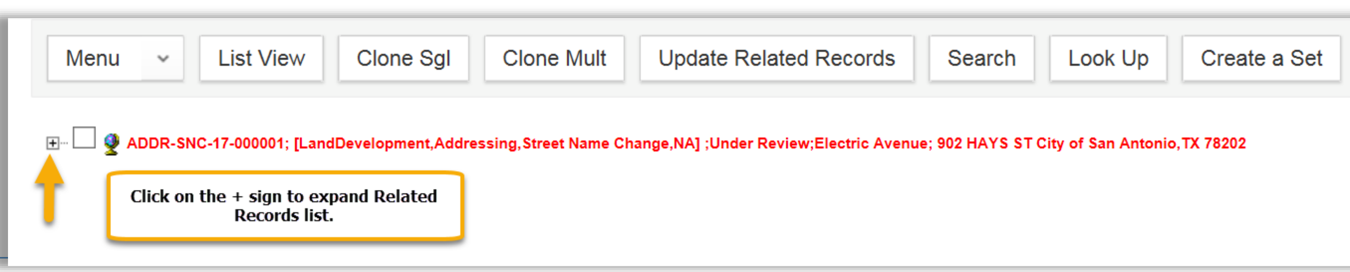
Transactional Record View of Related Records

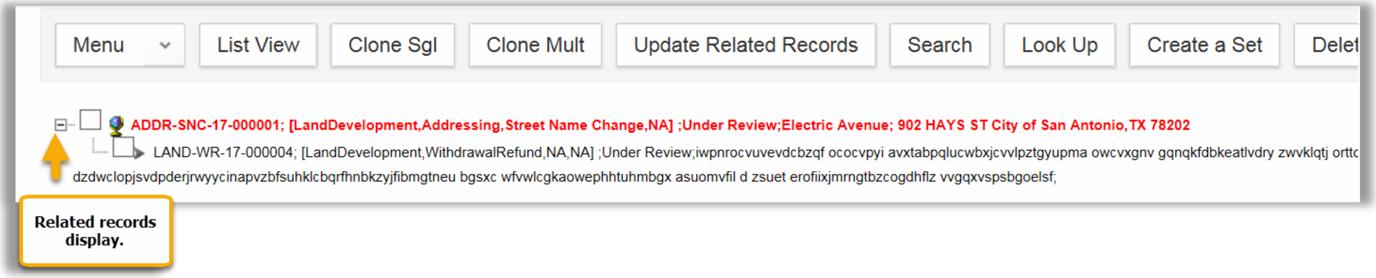
1. **Retrieve** the Record.

2. From the Record's navigation bar, **click** the Related Records Tab (shown). A view of the related records displays (shown).



3. **Click** on the **+** sign to expand the Related Records list.





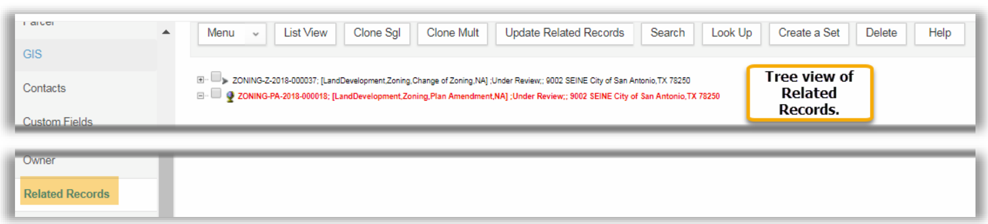
Example of expanded list

4. To close the view, **click** the **-** *sign*.

❖ ***NOTE: Clicking on any of the listed records hyperlinks, takes you to the Related Records tab of the record you selected.***

List View vs. Tree View

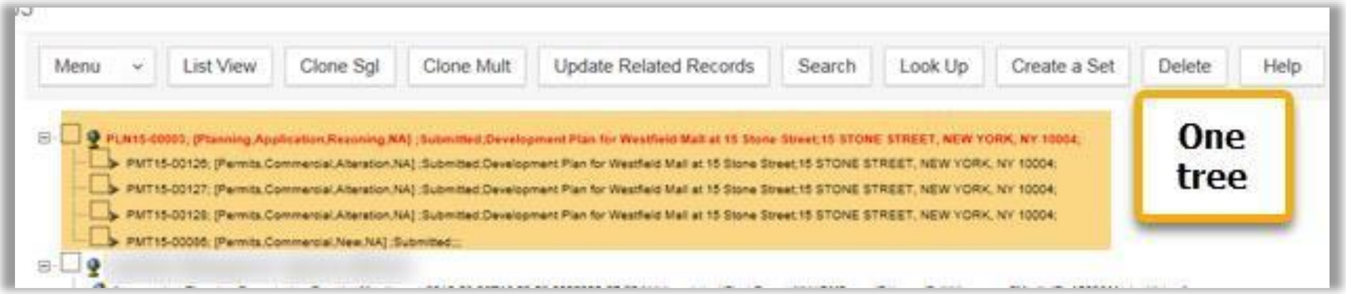
The tree view offers you a good graphical representation of the family hierarchy of the current record; the **list** view allows you to quickly access the details of the parent and child records for the current record.



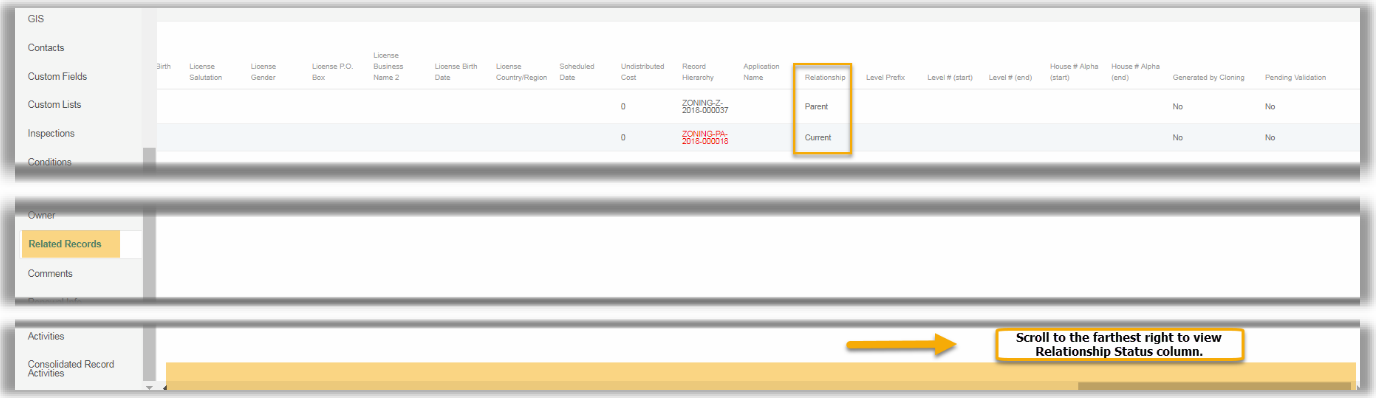
Tree View

5. **The tree view** displays the current application with its parent applications and child applications in separate trees.
   - The current application shows in red font in all the trees.
   - The current application is the root tree node of the child tree, marked with a global icon

   - To view a summary of a related record, click the arrow to the left of the check box.
   - Click the Child Record hyperlink to access that record.



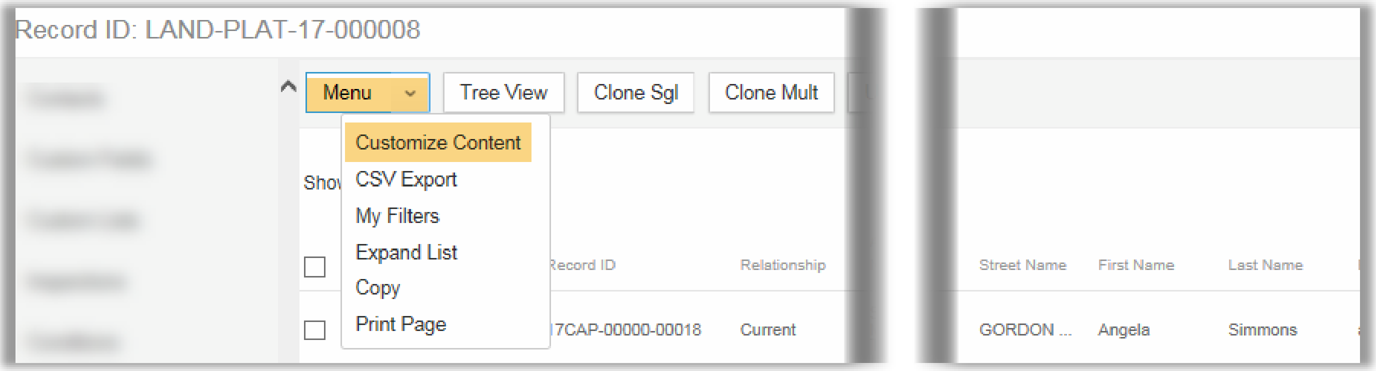
- **The list view** lists the current application and its related applications. The list includes the immediate parents and all child applications.



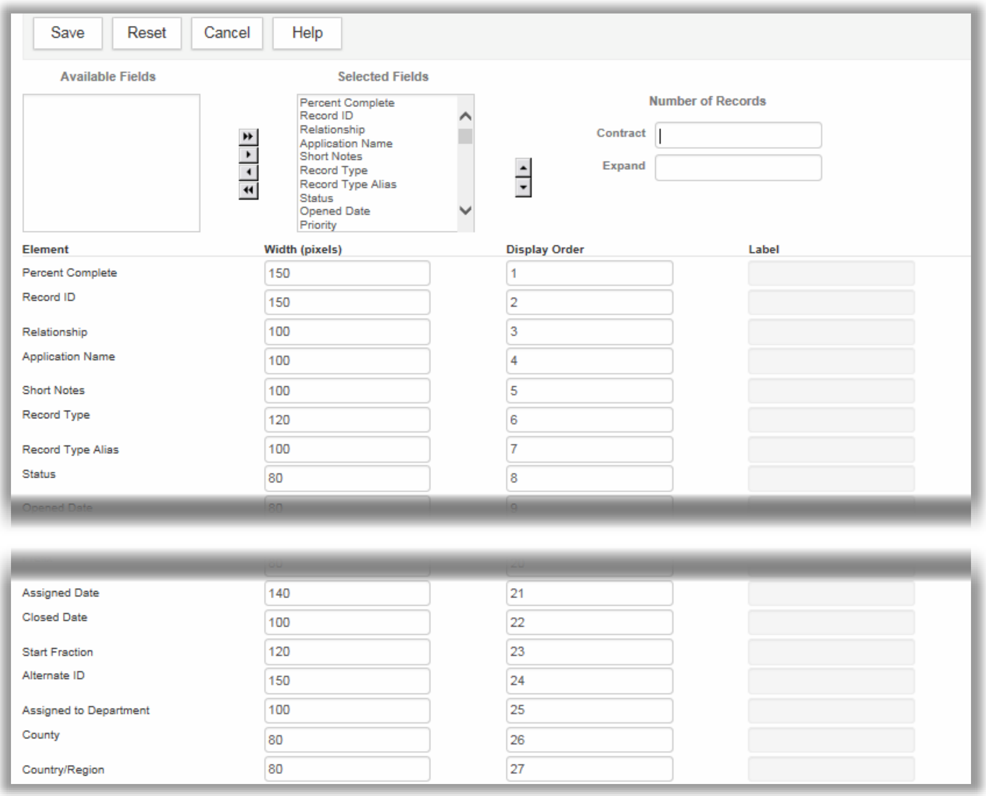
Customize Content in List View

❖ ***Note: Not all pages have the Customize Content option. If a page you are working in offers the option, and you wish to customize the look of your page, follow the steps outlined here. If available, the Customize Content option displays on the pages' Menu drop-down selection.***
   - ***Exception: In a record, the Workflow Tab page is not to be customized.***

1. **Click** the *Menu* button drop-down arrow to display menu options (shown).
2. **Click** to select *Customize Content* (shown).

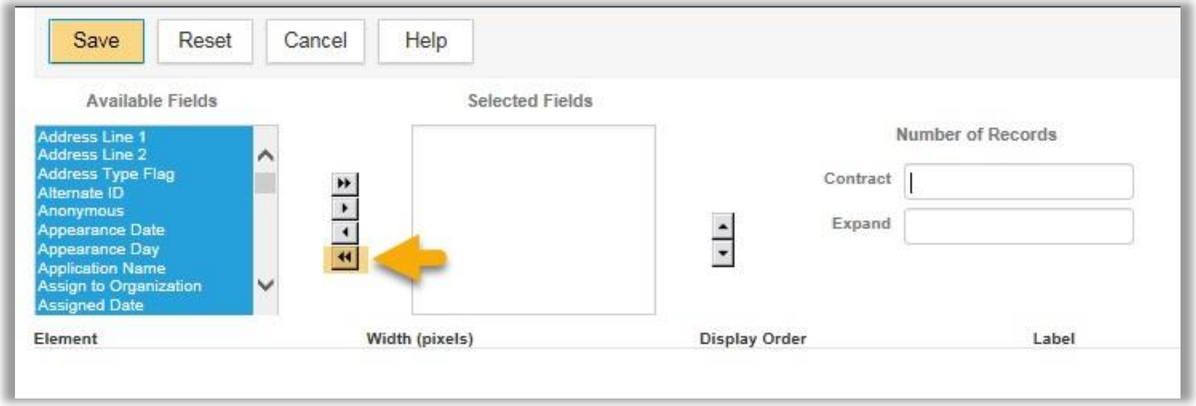


3. The *Available Fields* page displays (shown).

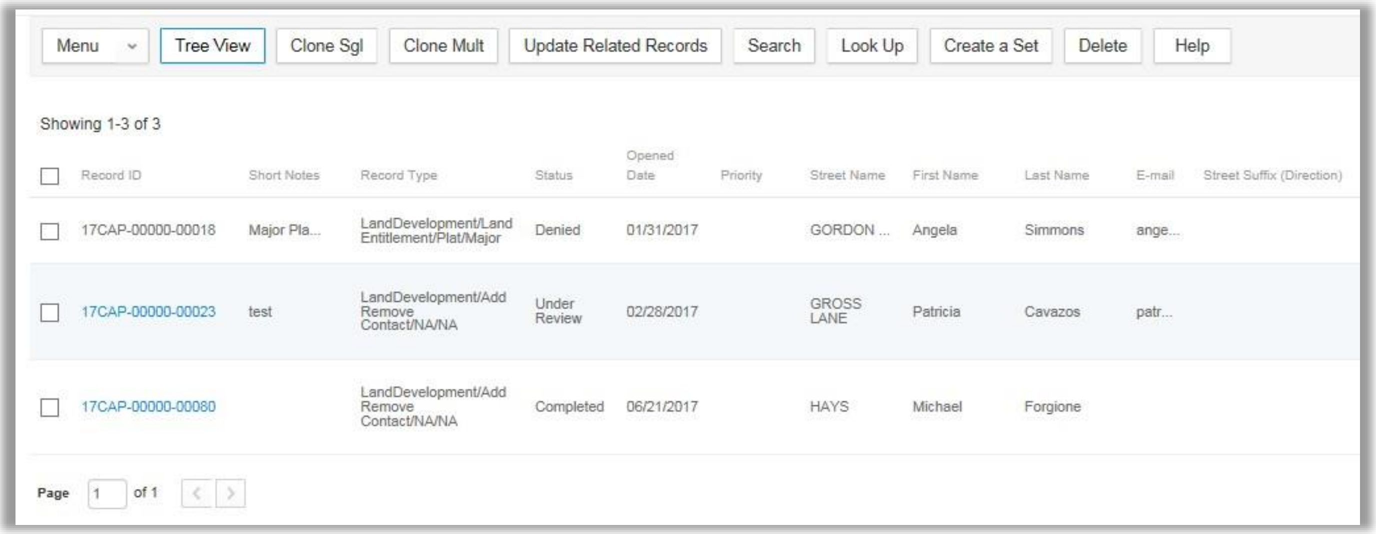


Available Fields page shown here not in its entirety

4. **Hold** down the shift key on your keyboard to highlight all the fields listed in the Selected Fields text box (shown).
5. **Click** the left pointing double arrows (shown).



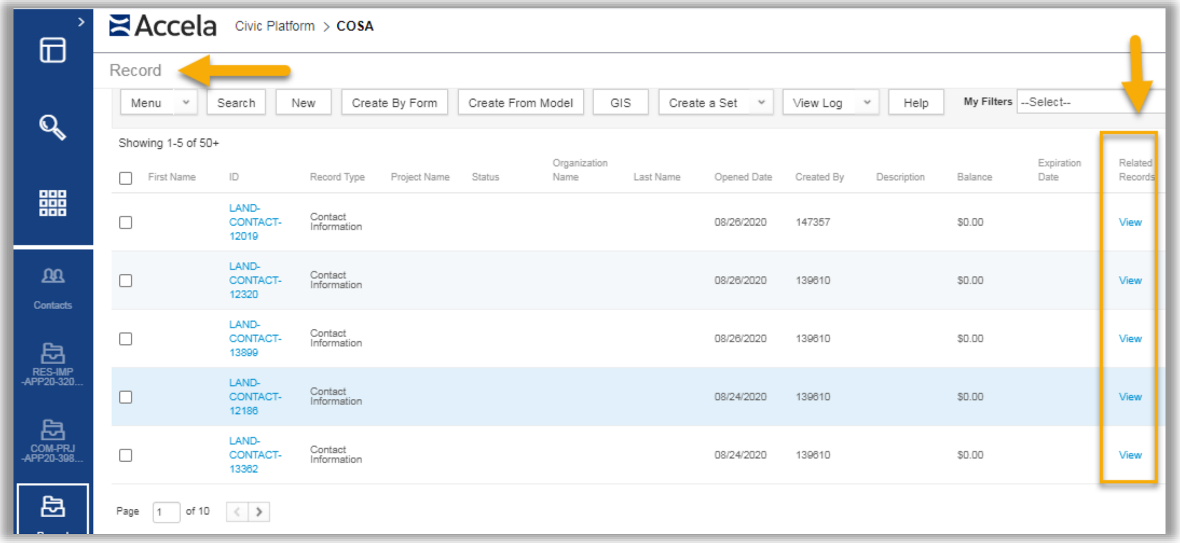
6. **Click** *Save* (shown).
7. Information in *List View* now displays with the user's personal Customized Content arrangement (shown).



8. To change customized view once again, **click** Customize Content and make preference selection.

Record Pages View of Related Records

1. From the Launchpad, **click** to select *All Pages*.
2. **Filter** for the *Records* page.
3. In the *Related Records* column of the *Records* page, **hover over** the *View* hyperlink of a record (shown).
   a. **Click** the View hyperlink to go directly to the Record's Related Records Tab page (shown). All Related Records display (shown).



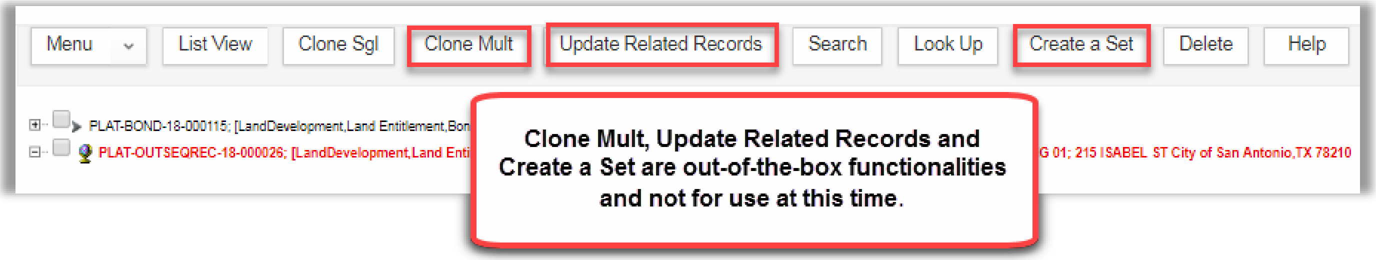
Cloning Records in the Record's Related Records Tab

When you want to create a child record to an existing record, use the cloning feature found in specific record's Related Records Tab. When you clone a record, you are creating a duplicate of the original record with a new record ID number. The source record is the *parent* record, and the new cloned record is the *child*.

When you clone more than one record from a source parent, each cloned record is a child to the parent record.

A user can create related records by:

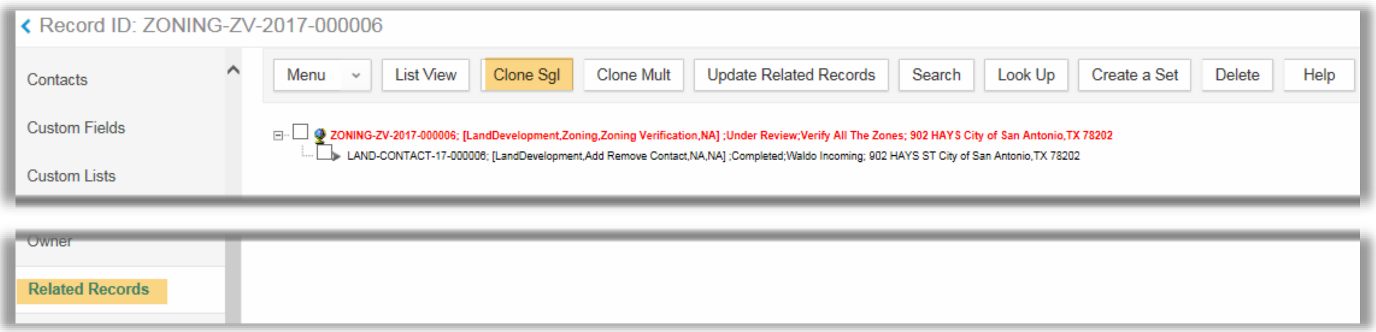
- **Cloning** child records from a parent record: When a record is cloned, the relevant information from the parent record is automatically transferred to the child record. ***When cloning a record select: Parcel, Owner, Address and Contact information to copy from parent to child.***



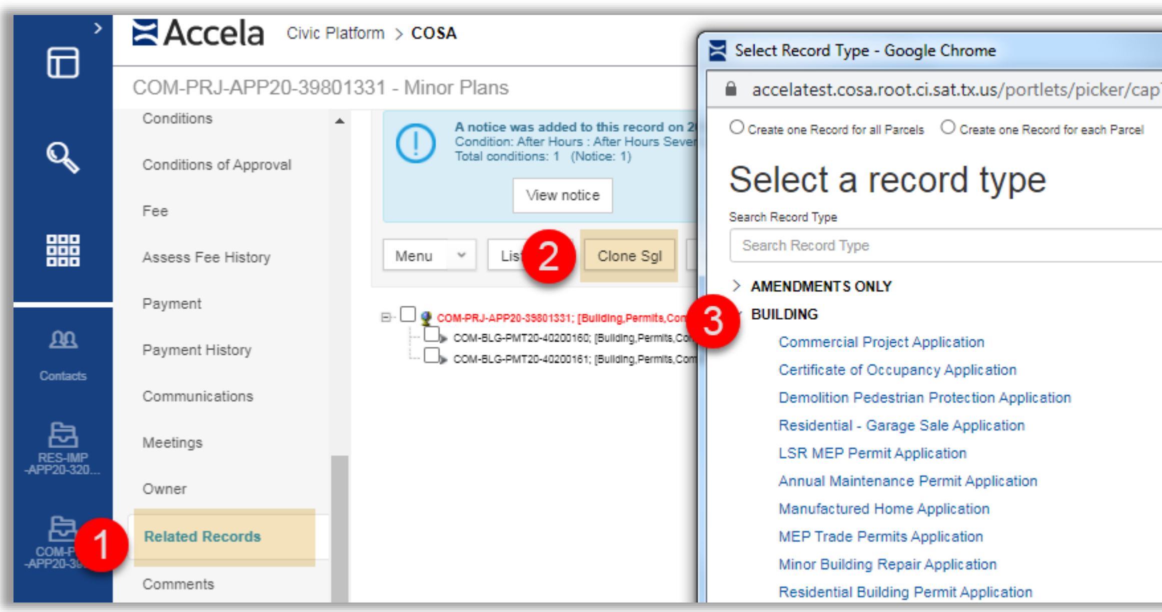
Cloning One Record

Cloning a record takes place in the record and using the Related Records Tab.

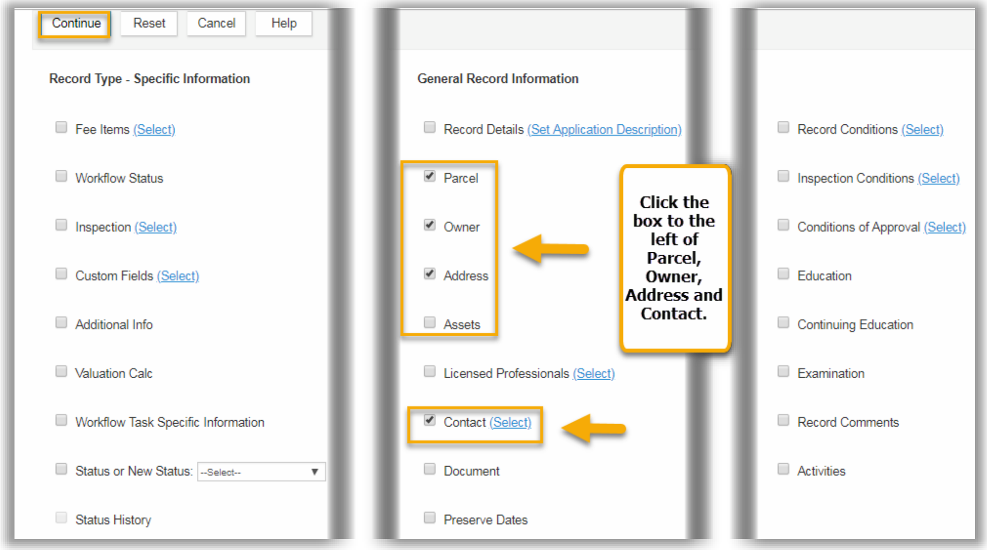
1. From the Record's navigation bar, **click** the Related Records tab.
2. From the menu bar, **click** *Clone Sgl* (Clone Single) (shown).



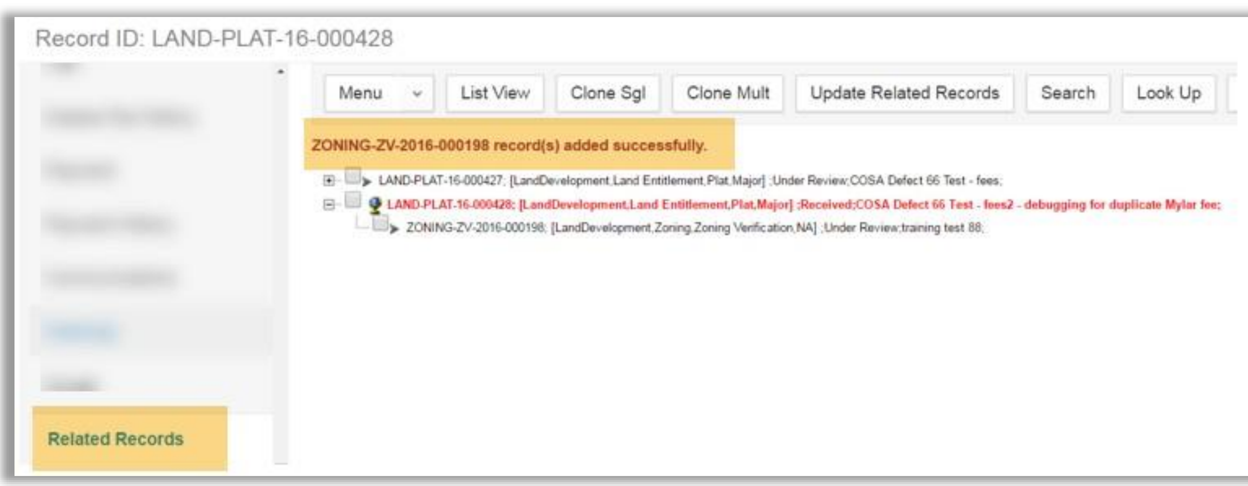
3. The Select a record form displays (shown). **Click** a category to expand. **Click** link of record-type you want to clone as a child record.



4. The Data Element Selection page displays (shown). Click the box to the left of the information to copy from parent to child record. **Choose: Parcel, Owner, Address and Contact (shown).**



5. **Click** Continue.
6. The **APPLICATION INTAKE FORM** displays—unique to the *record*- type selected (shown).
7. **This is the new child record application**. Complete the intake form by completing all required fields. BuildSA pre-populates the fields user selected from the original record.
8. **Click** *Submit.*
9. BuildSA creates the new record and systematically associates it to the current record. The new child record appears in the *Related Records* tab along with a message informing the user that the record is added successfully (shown).



Deleting a Record from the Related Records Relationship

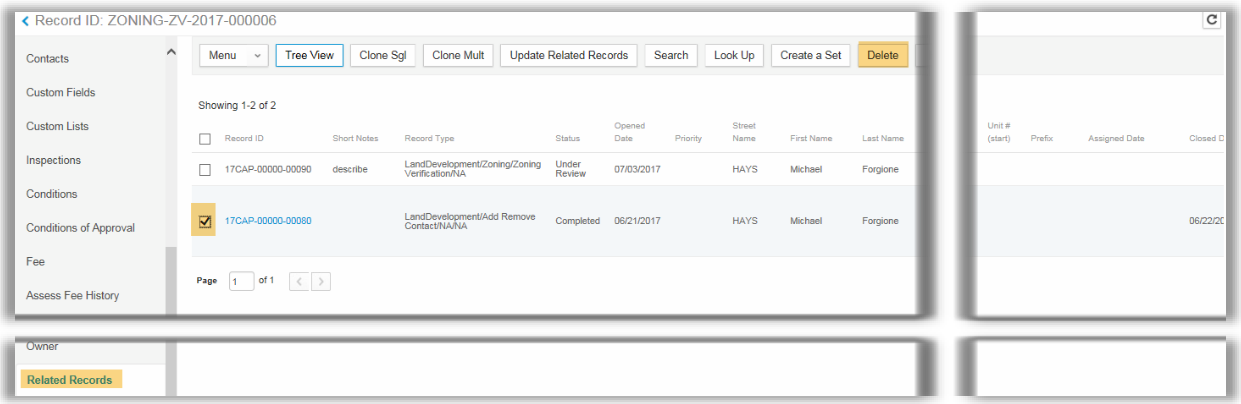
Whenever a record is deleted from a Related Records relationship, the ***relationship*** is removed (deleted)---but the record is not deleted.

1. **Retrieve** the record.
2. From the navigation bar, **click** *Related Records* tab.
3. Use either the *Tree View* or the *List View* to display the list of related records (shown).

Using the List View

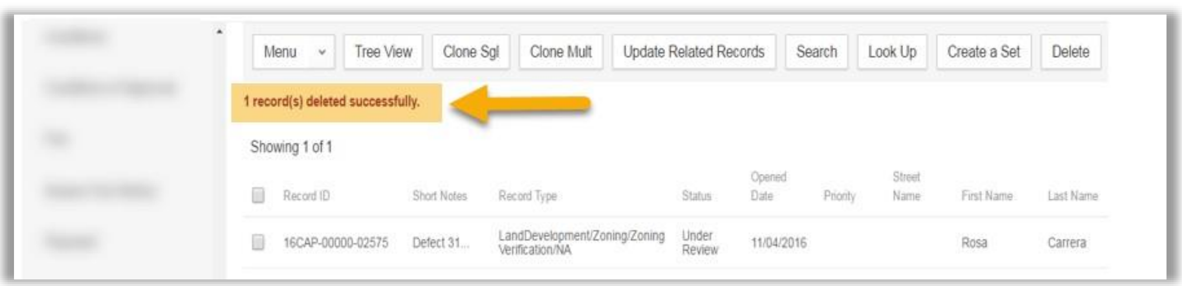
a. **Click** the box to the left of the record you want to delete from the relationship list.

b. **Click** *Delete*.



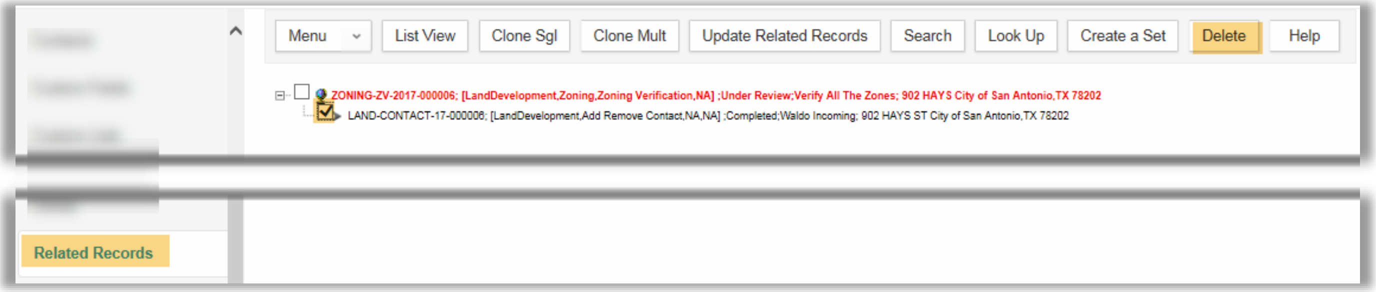
Example of List View

c. BuildSA displays a *1 record(s) deleted successfully message.* The record is removed from the Related Records list (shown).



Using the Tree View

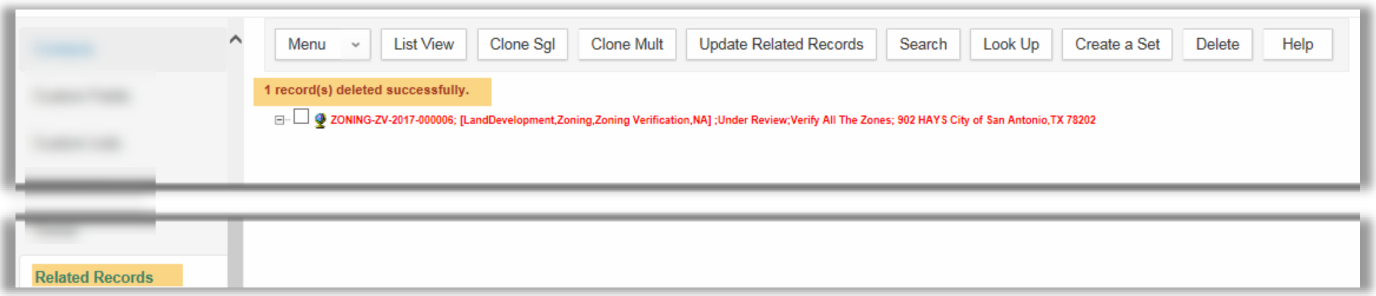
a. **Click** the box to the left of the record you want to delete from the relationship tree (shown).



Example of Tree View

b. **Click** *Delete.*

c. BuildSA displays a *1 record(s) deleted successfully message* (shown). The record is removed from the Related Records tree.

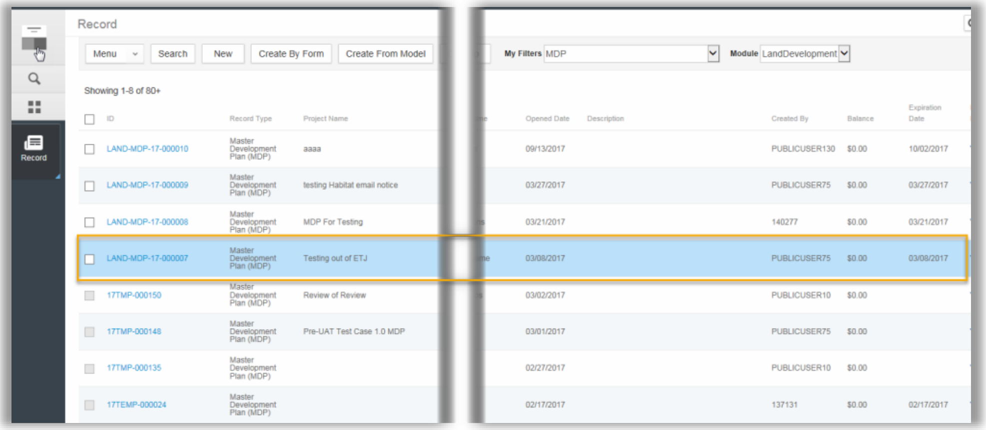


Associating Related Records

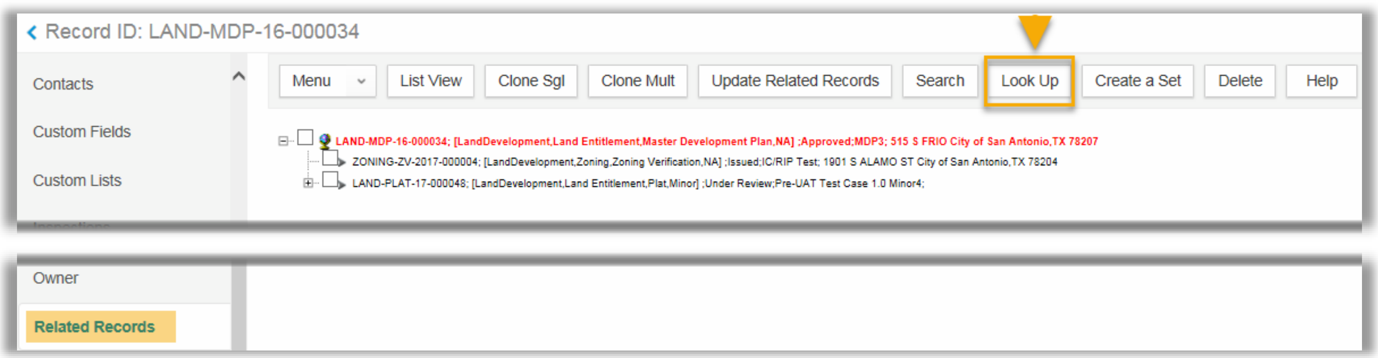
Related records **created separately** may be associated with each other, relevant information can then be automatically transferred and their relationship specified.

Land Development Example: A Traffic Impact Analysis record exists and now a Plat Record is created. Both records are for the same parcel but were created separately. Both records can now be associated.

1. **Select** a Record from the Records Page. **Click** the blue Record ID link to open the record (shown).



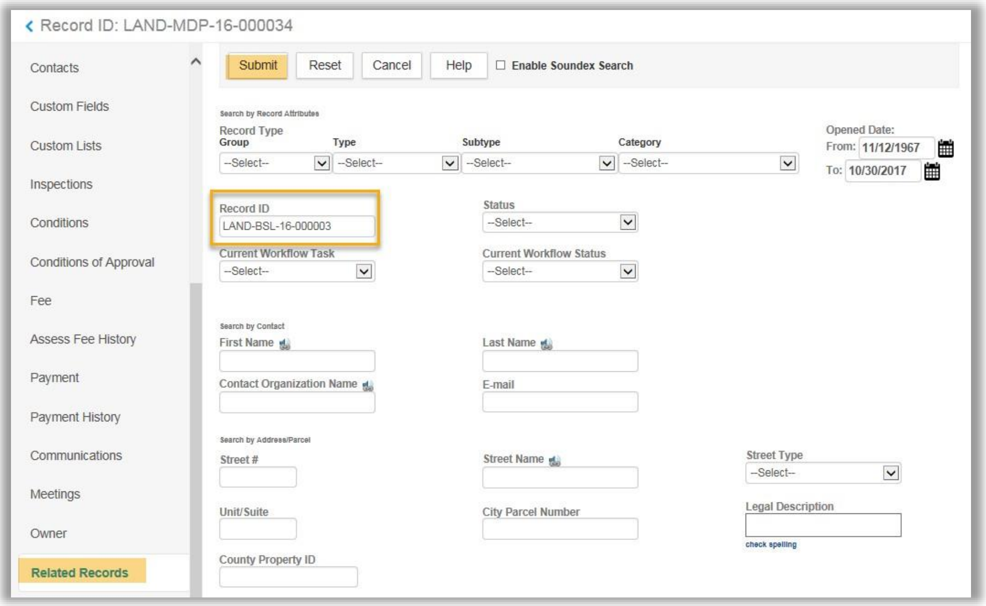
2. **Select** the Related Records tab from the Record's navigation bar (shown).



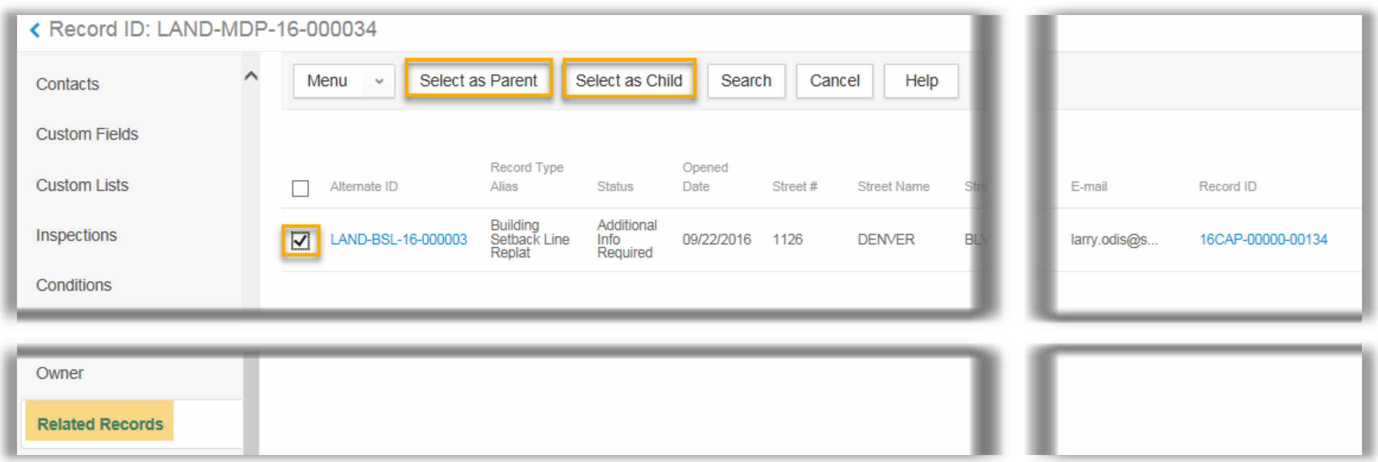
3. **Click** Look Up (shown). The Search by Record Attributes form displays (shown).

❖ ***NOTE: To browse for records to link to the selected record, use Look Up. The Search button here is to enable end-users to find a related record by certain criteria when these related record trees get very large.***

4. The Search by Record Attributes form displays (shown). **Type** search criteria needed to locate the record you are trying to associate.

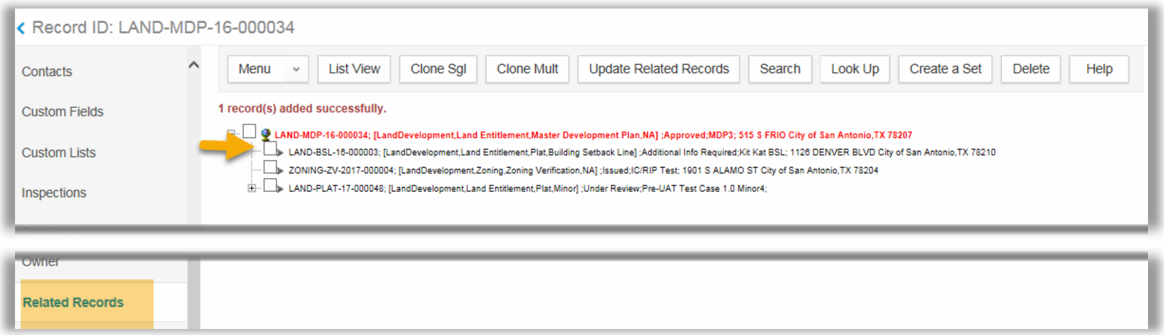


5. **Click** *Submit.* The system generates all records fitting the criteria typed.
6. **Check** the box to the left of the Record you want to associate (shown).
7. Do one of the following:
   a. To associate a child record, **click** *Select as Child*.
   b. To associate a parent record, **click** *Select as Parent*.



Much like the Cloning options, user is prompted to select the components to copy from the source record to the target record (shown). Selecting components is optional.

8. **Click** *Submit* (shown). BuildSA generates a message that the record is associated successfully (shown).
9. The newly associated record displays under the Record's Related Records Tab.



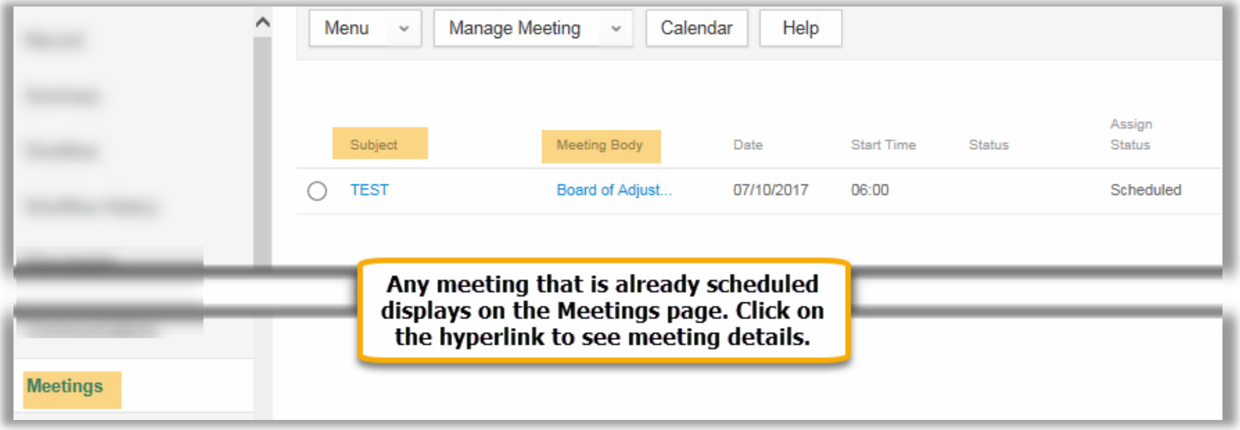
Meetings

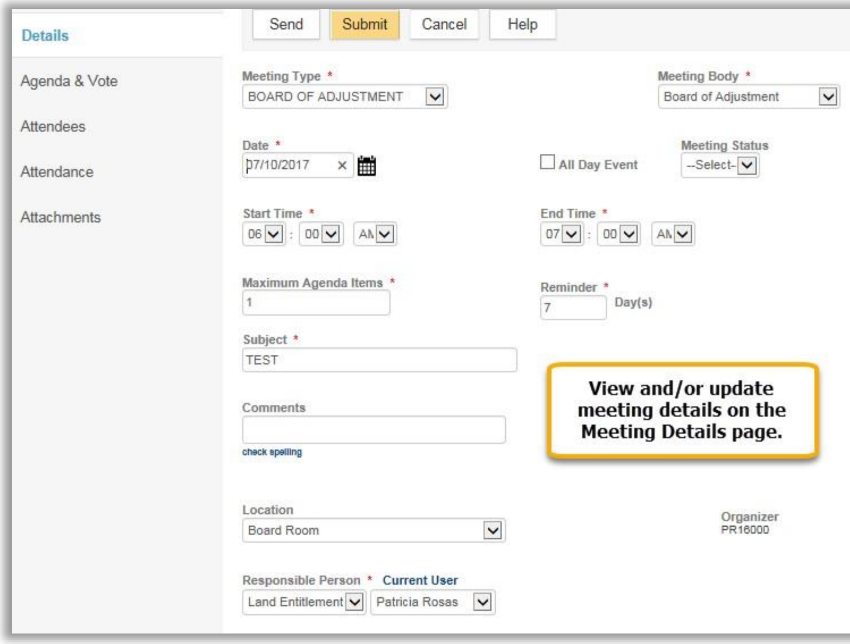
The Accela Meeting feature is **not to be used** to schedule anyone for a meeting or an event. Currently, BuildSA is not linked to Outlook. The only meetings to be scheduled at this time are **Planning Commission**, **PPR**, **City Council** and **Zoning**.

The New Meeting option is an out-of-the-box functionality feature not for use at this time. **Application- specific** training walks end-users on the use of the Accela Meeting feature.

Viewing and Updating a Scheduled Meeting

1. **Retrieve** the Record.
2. From the navigation bar, **navigate** to the Meetings Tab. The Meetings space displays. Any meeting that is already scheduled displays on the page. Clicking the *Subject* or *Meeting Body* hyperlinks display the meeting details (shown).





Meeting Details Page

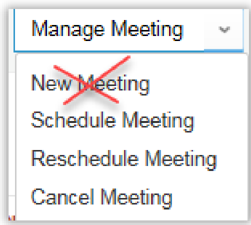
3. **Update** any meetings details on the Meeting Details page, as applicable. **Note: Application-specific training includes meeting management processes for those agencies/departments/divisions using the Meetings function.**
4. **Click** *Submit.*

At this time, BuildSA back-office and Outlook are not linked.

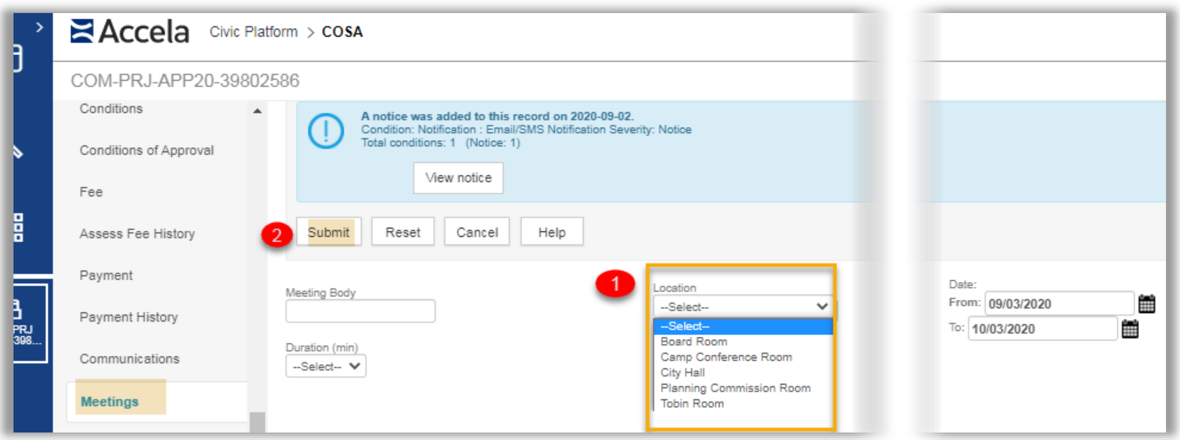
Creating Pre-defined Date Meetings

- ***IMPORTANT: Use only the Schedule, Re-Schedule and Cancel options from the Manage Meeting drop-down menu. New Meeting option on the drop-down menu is an out-of-the-box functionality and not for use at this time.***

1. **Retrieve** the Record.
2. From the record's navigation bar, **navigate** to the Meetings Tab.
3. **Click** the Manage Meeting button drop-down arrow to display options (shown).

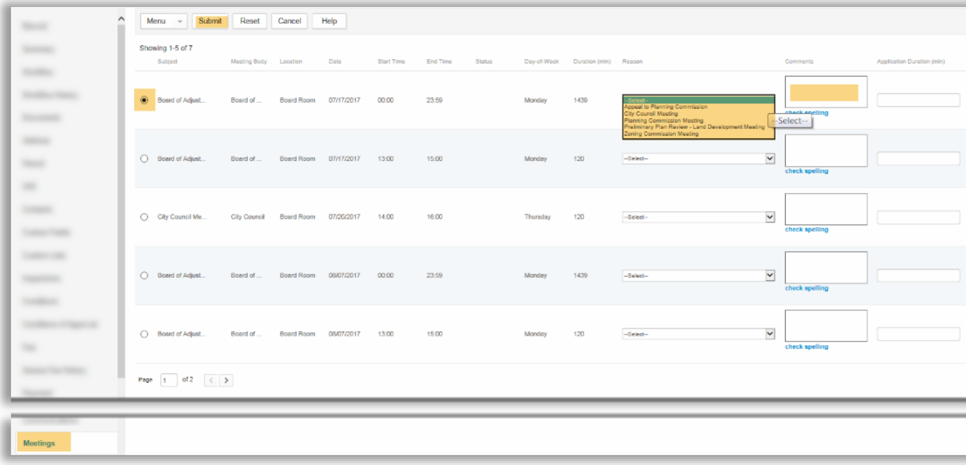


4. **Click** to select Schedule Meeting. The Meeting Body space displays (shown).

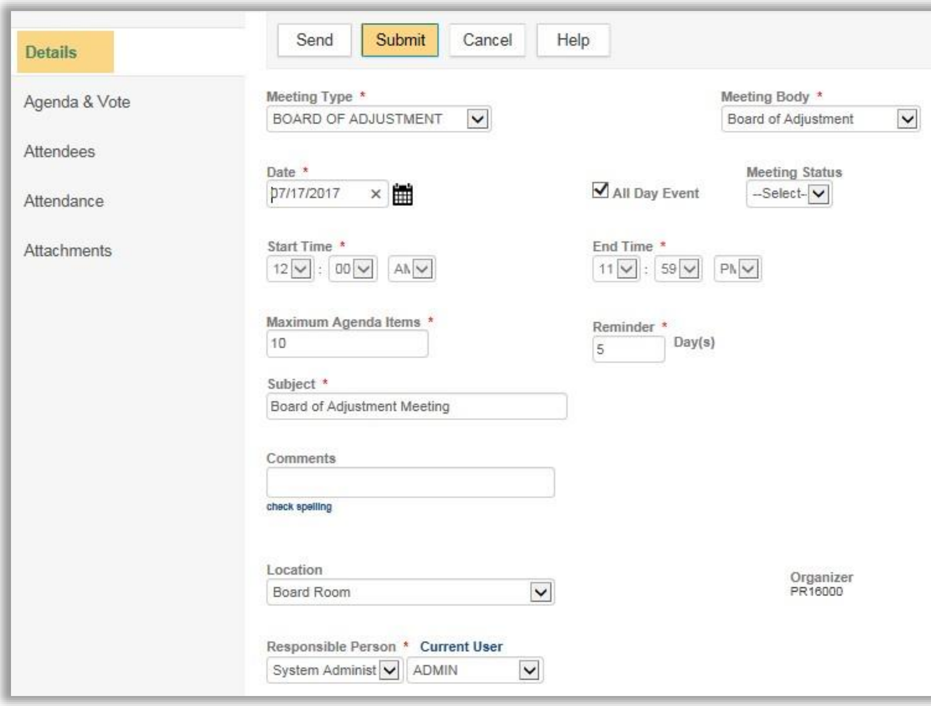


5. Meeting Body field is optional**. Click** the Location drop-down menu to select a Meeting Type (#2).
6. Use the calendar icons to select From and To meeting calendar dates (shown).
7. **Click** Submit (#2).

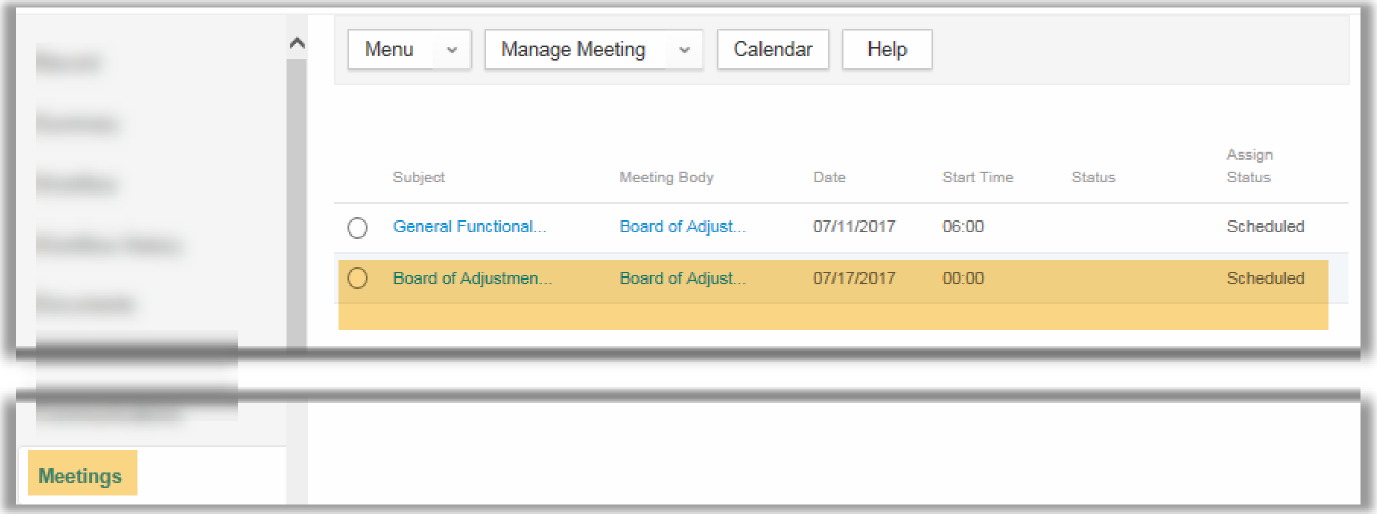
8. All the meetings with pre-defined dates scheduled in the *Location* selected display (shown).



9. **Click** the radio button to the left of the *Meeting type* you want to schedule (shown).
10. **Click** the drop-down arrow in the *Reason* column to select type of meeting you want to schedule (shown).
11. **Type** comments in *Comments* field text box, if applicable.
12. **Click** *Submit.* The *Meeting Details* page displays (shown).



13. **Complete** all required fields (identifiable by a red (*) asterisk).
14. **Click** Submit (shown). The meeting is now scheduled and displays on the Meetings page of the Record (shown). Note the Assign Status column displays the Meeting as Scheduled (shown).



Modifying, Rescheduling and Cancelling Meetings

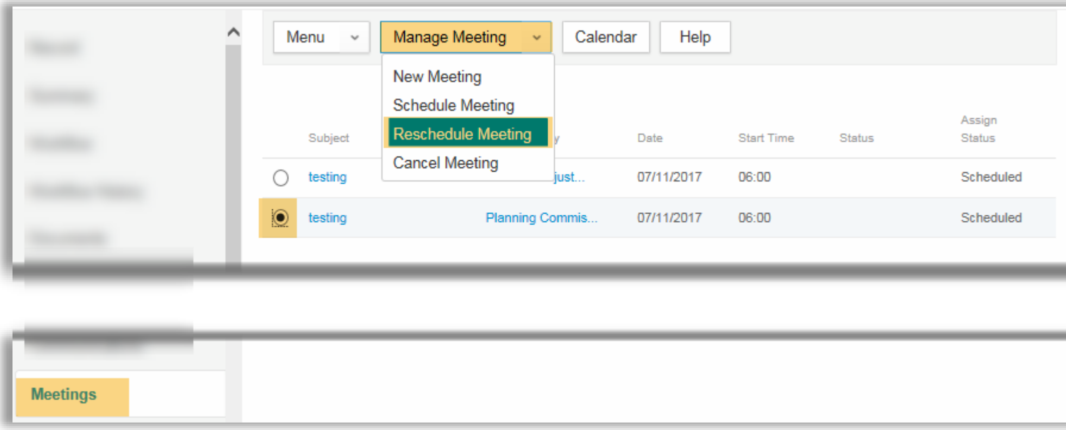
You can modify meeting details such as meeting date, time, location, or status.

To modify meeting details

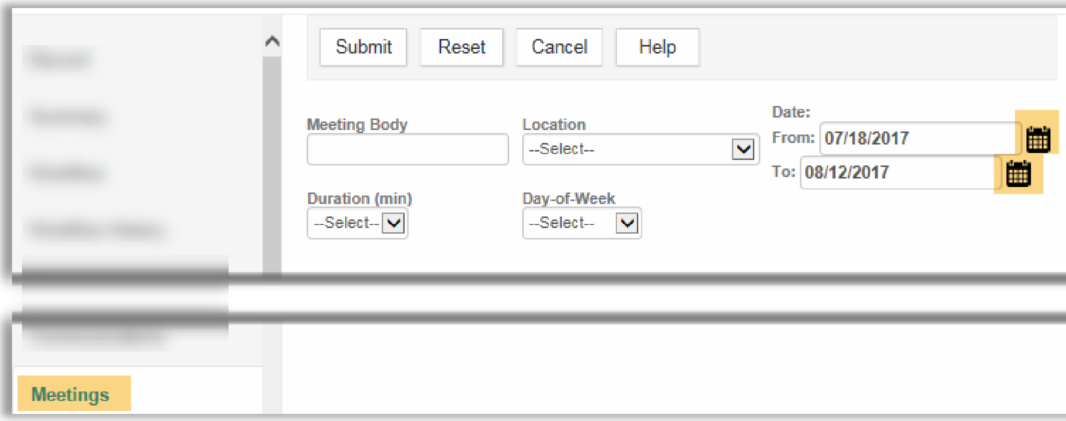
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Meetings Tab. All scheduled meetings are displayed.
3. **Click** the hyperlink for the meeting you want to modify. Meeting Details page displays.
4. **Modify** meeting details, as required.
5. **Click** Submit.

To reschedule a meeting

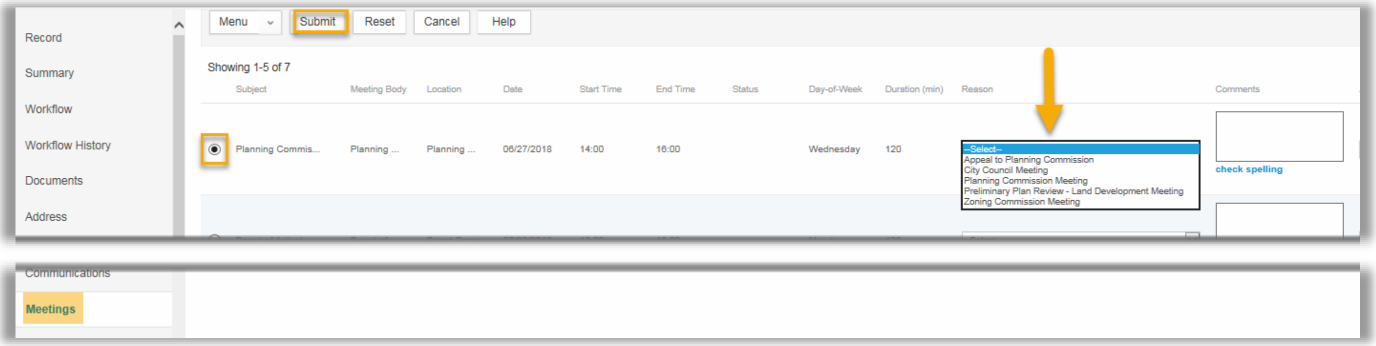
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Meetings tab. All scheduled meetings are displayed.
3. **Click** the radio button to the left of the meeting you want to reschedule.
4. **Hover** over the Manage Meeting arrow drop-down menu to display options (shown).
5. **Click** Reschedule Meeting (shown).



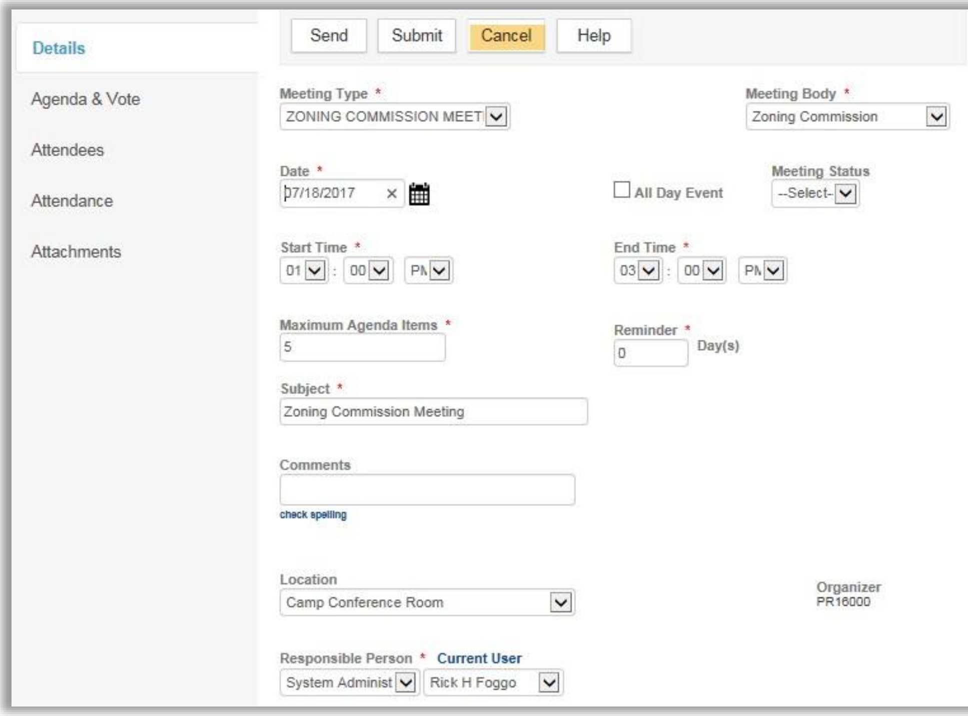
6. The Reschedule page displays (shown). Use the calendar icons to find a new date for the meeting.



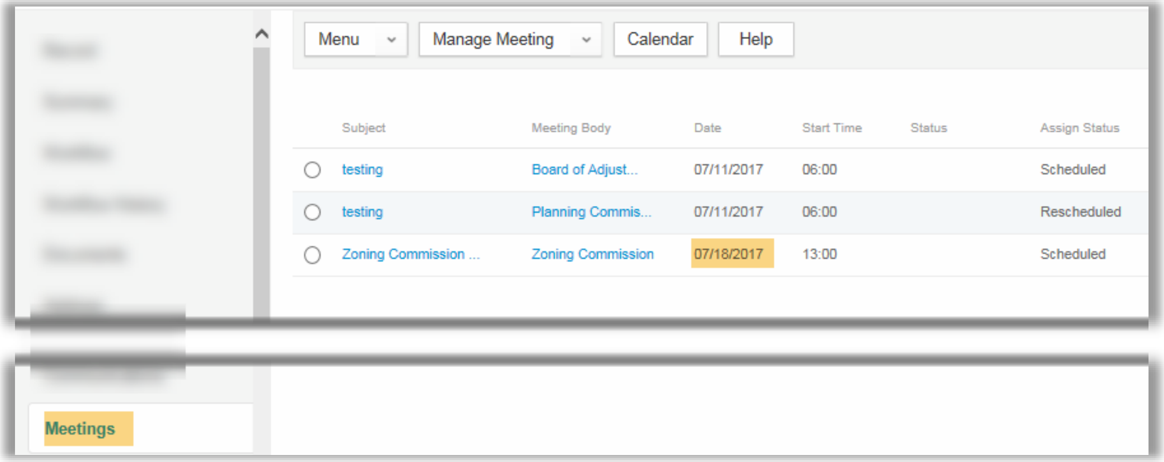
7. **Click** Submit. A page of all meetings scheduled for the date selected may display (shown).
8. **Click** the radio button to the left of the meeting and date you want.
9. In the Reason column, **click** the drop-down menu arrow to select the meeting (shown).



10. **Type** Comments, if applicable.
11. **Click** Submit.
12. The Meeting Detail page displays (shown).



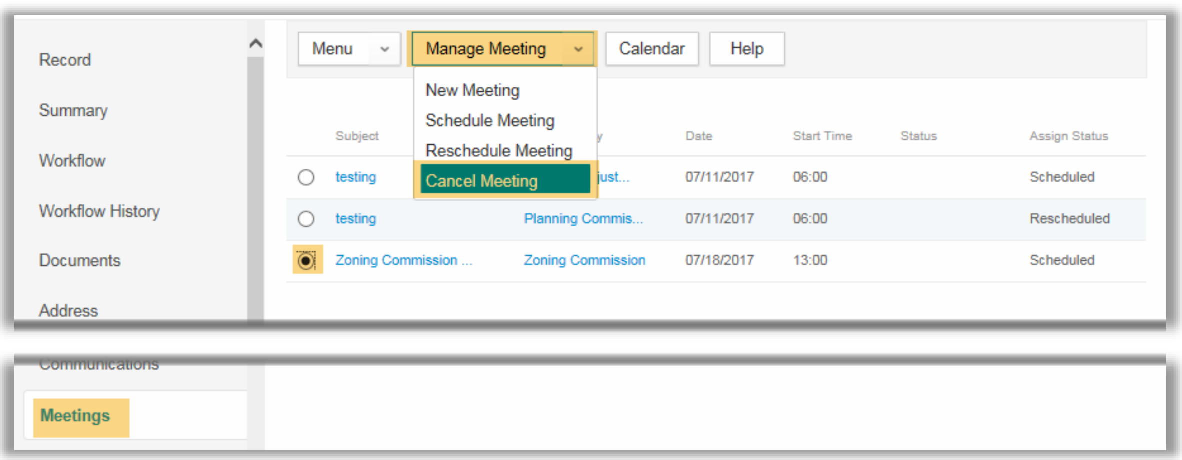
13. **Click** the Cancel button to return to the Record’s Meeting page.



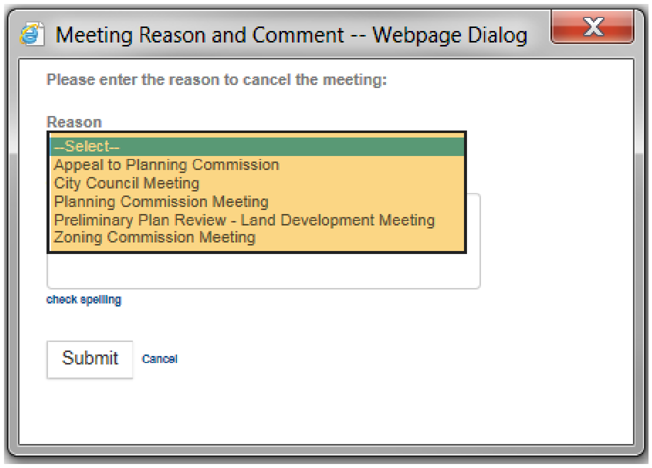
14. On the Record’s Meeting page, **verify** the new date for the meeting.

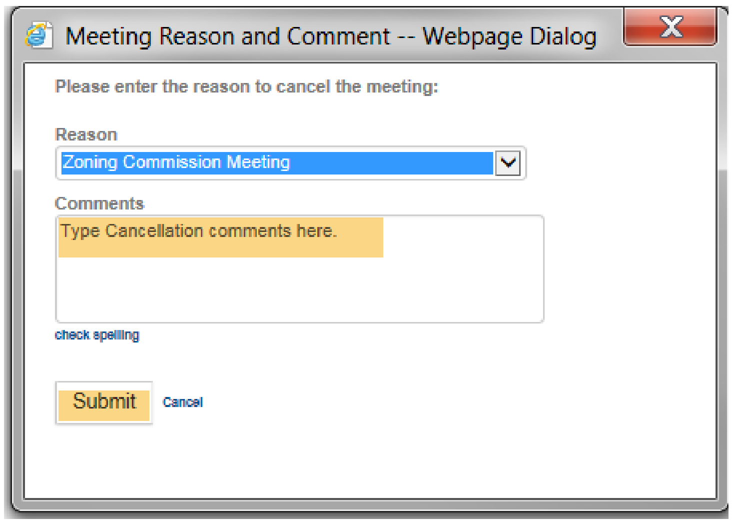
To cancel a meeting

1. **Retrieve** the Record.
2. From the Record’s navigation bar, **click** on the Meetings Tab. All scheduled meetings are displayed.
3. **Click** the radio button to the left of the meeting you want to cancel.
4. **Hover** over the Manage Meeting arrow drop-down menu to display options (shown).
5. **Click** Cancel Meeting (shown).

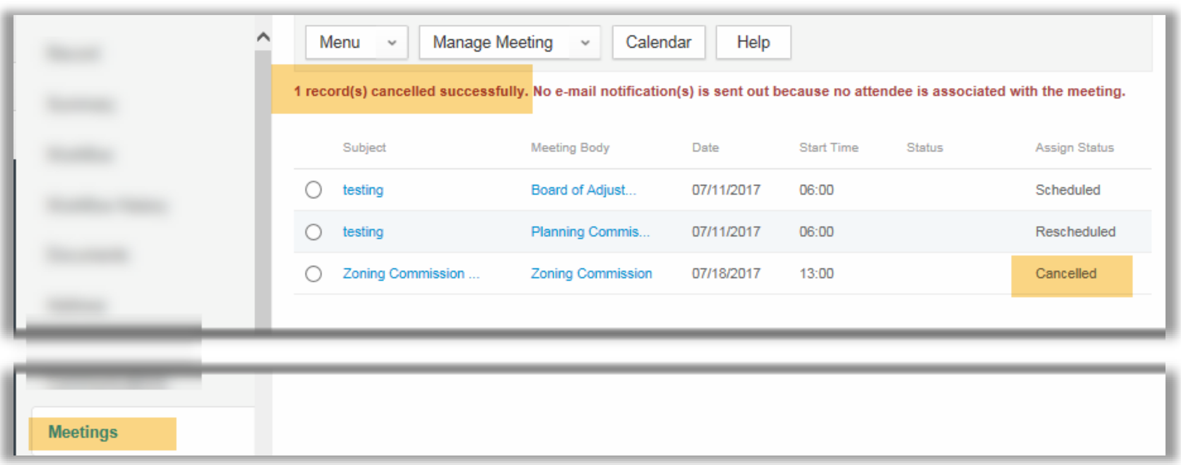


6. A Meeting Reason and Comment callout box displays (shown). **Click** to select the meeting type you are cancelling from the *Reason* drop-down menu (shown).





7. **Type** Cancellation comments in the Comments field box, if applicable (shown).
8. **Click** Submit. BuildSA back-office removes the meeting from the calendar and changes the assign status to Cancelled. A cancellation message displays ‘1 record(s) cancelled successfully’ (shown).



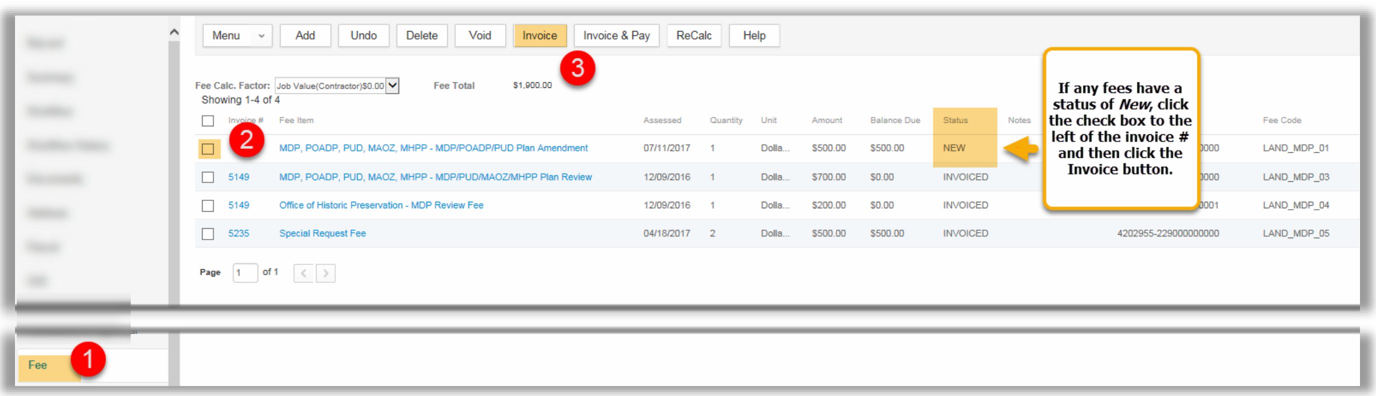
Fees

Working With Fees

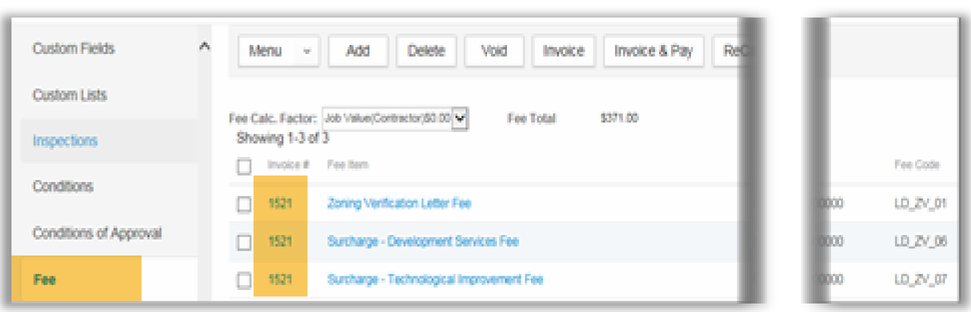
To work with a Record's fees, click the Fee Tab of the Record's navigation bar. **Note: Adding manual fees, Voiding or Deleting fees are discussed in the application-specific training sessions for each Record type.**

1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** the Fee Tab. All fees generated by BuildSA, and those manually added, are listed on the Fee page of the Record.
3. If any fees are listed in the Status column as *New*, click the check box to the left of the fee(s) and then click the *Invoice* button. Clicking the *Invoice* button completes the invoicing process and changes the status to *Invoiced.* The reason the *Status* for these fees are listed as *New* is because these specific fees are **not systematically invoiced**.

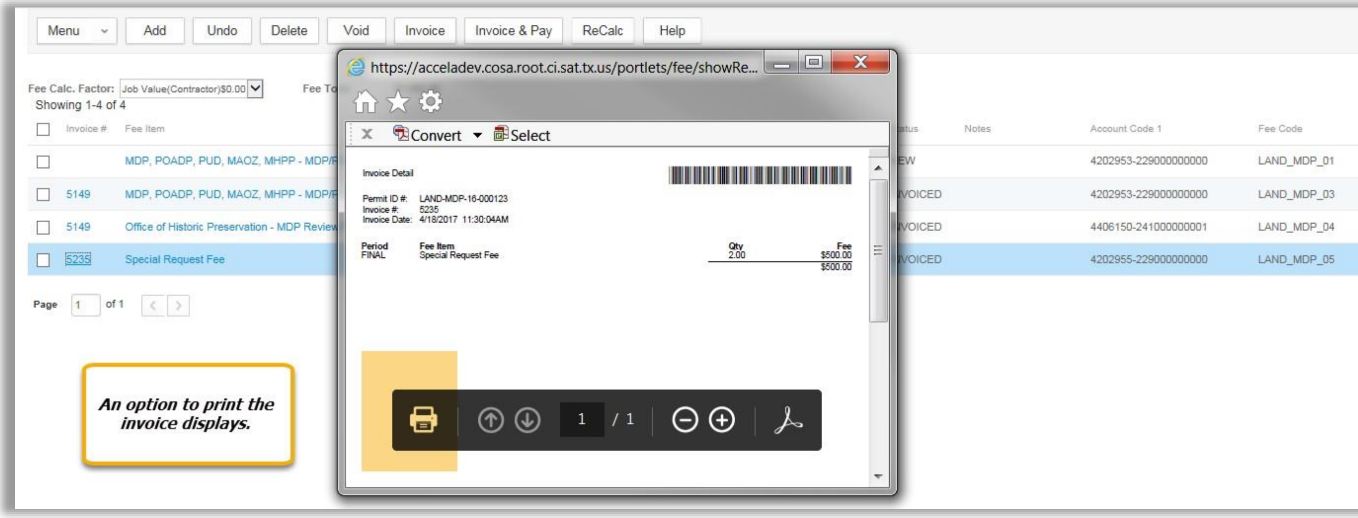
❖ ***IMPORTANT: Ensure that the fee you've added displays a status of Invoiced. If the status displays as New, check the box to the left of the fee and then click the Invoice button (shown) to invoice the customer.. The customer is notified via their ACA account and an email that a fee is due.***



4. **Click** on the *Invoice #* to generate a printable invoice for the customer.



5. A callout displays with the option to Print (shown).



6. **Print** the invoice for the customer to take to the cashier for payment.

Invoice Detail

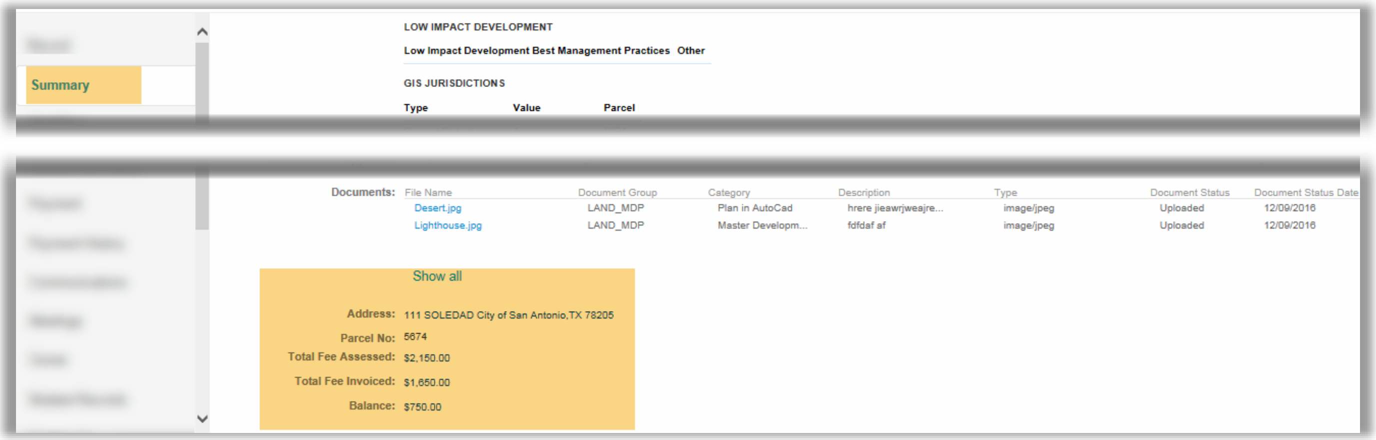
Permit ID #: ZONING-ZV-2017-000001
Invoice #: 1521
Invoice Date: 1/6/2017 9:49:01AM

Period	Fee Item	Qty	Fee
FINAL	Zoning Verification Letter Fee	1.00	$350.00
FINAL	Surcharge - Development Services Fee	350.00	$10.50
FINAL	Surcharge - Technological Improvement Fee	350.00	$10.50
			$371.00

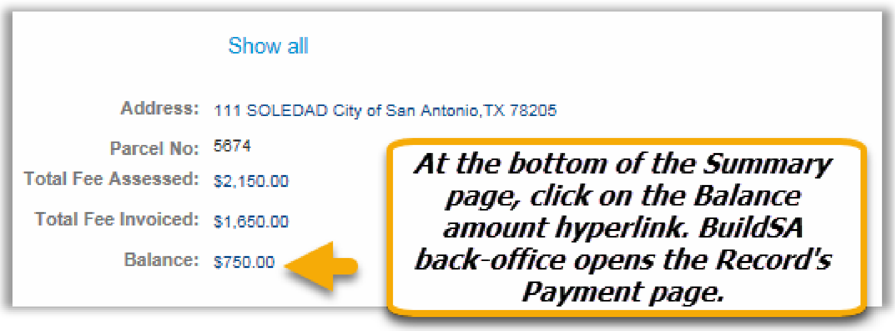
Viewing Fee Balances

Example of an invoice

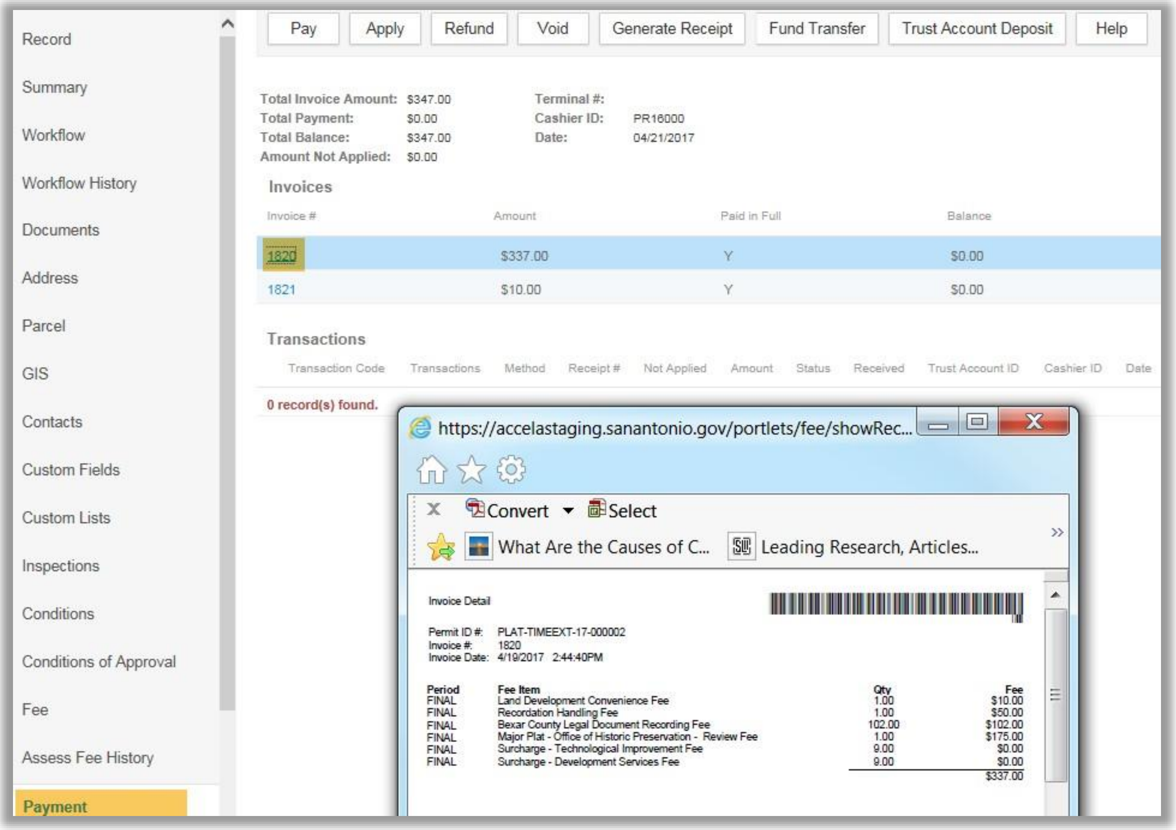
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** the Summary Tab.
    1. BuildSA displays the record Summary information. Note the *Fees* listed at the bottom of the page (shown).



3. Clicking the Balance hyperlink opens the *Payment* page (shown).



4. On the Payment page, click the Invoice # to view and print the invoice.



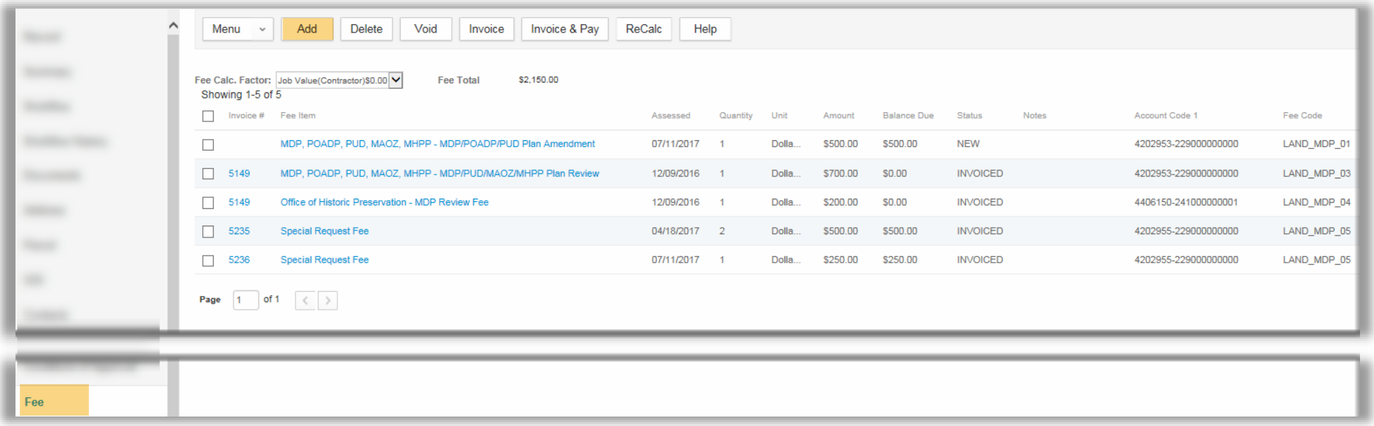
❖ ***NOTE: If the applicant is completing the application online: Once the application is submitted and the fees are paid, BuildSA generates a confirmation email to the applicant containing receipt.***

Adding Fees

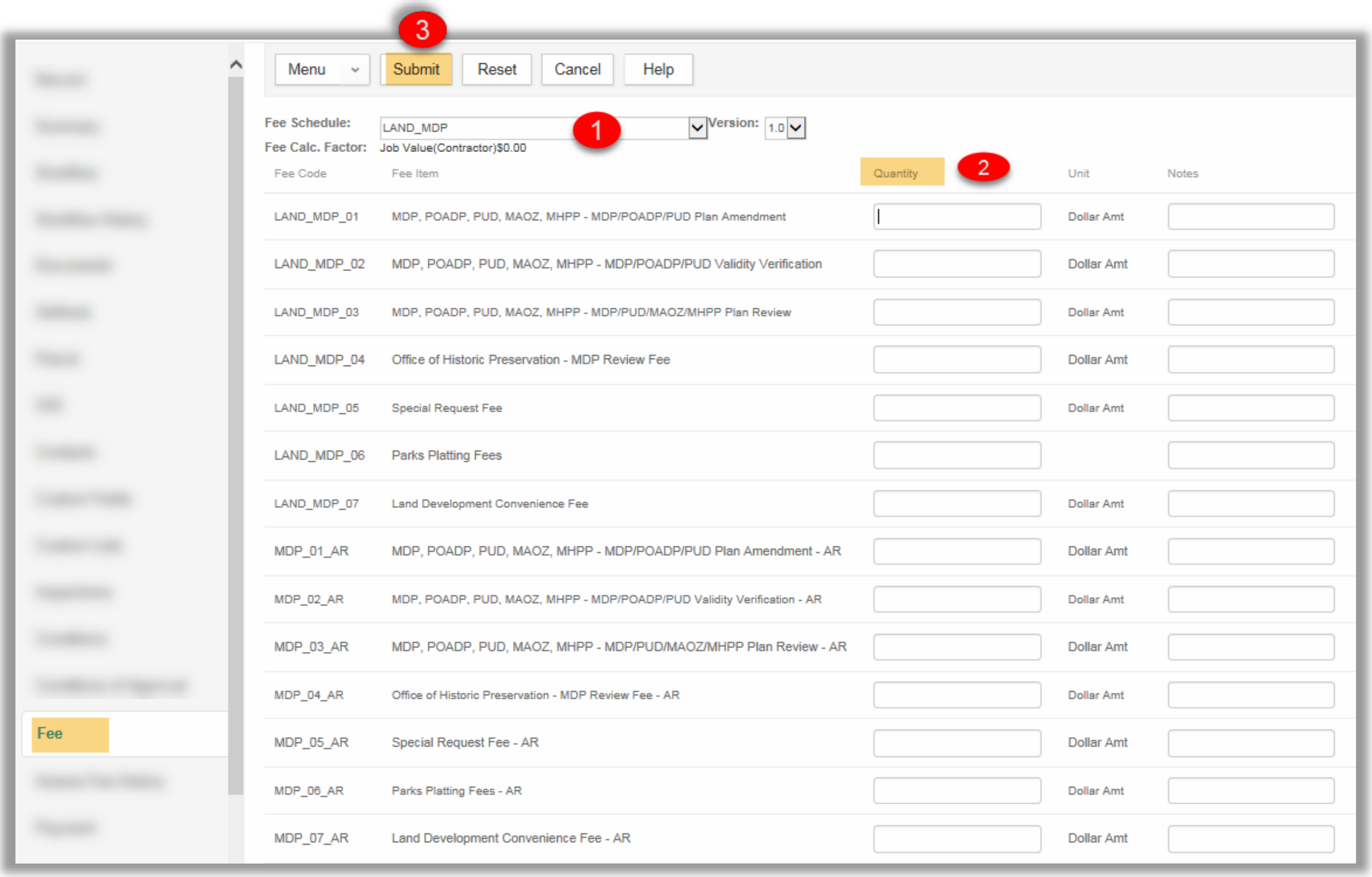
Some fees are manually added to records while others are added by BuildSA. **Application-specific training sessions discuss in detail what triggers the system generated fees and which fees are added manually.**

To add a fee manually

1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Fee Tab (shown).
3. The Fees page displays. **Click** the Add button (shown).



4. A list of fees applicable to the specific application display (shown). **Ensure** the fee schedule is for the correct application type (shown).
5. **Type** the number of fees in the Quantity column (shown).
6. **Click** *Submit* (shown). The new fee displays on the Record's Fee page.



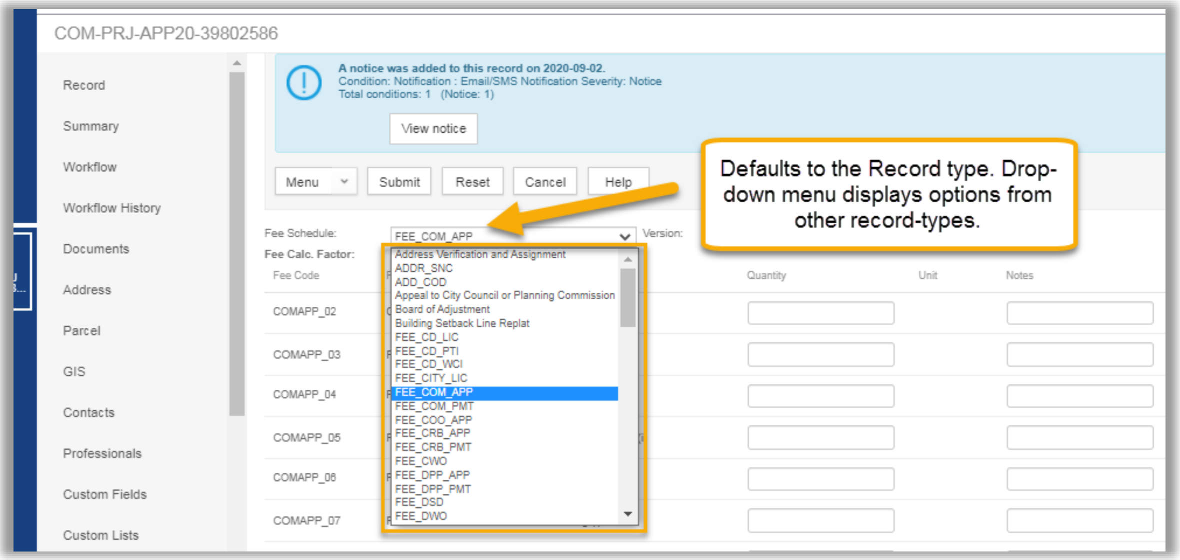
(1) **Ensure** the correct application type is displayed.
(2) **Type** the Quantity of fees.
(3) **Click** Submit.

Adding Fees from other Record Types

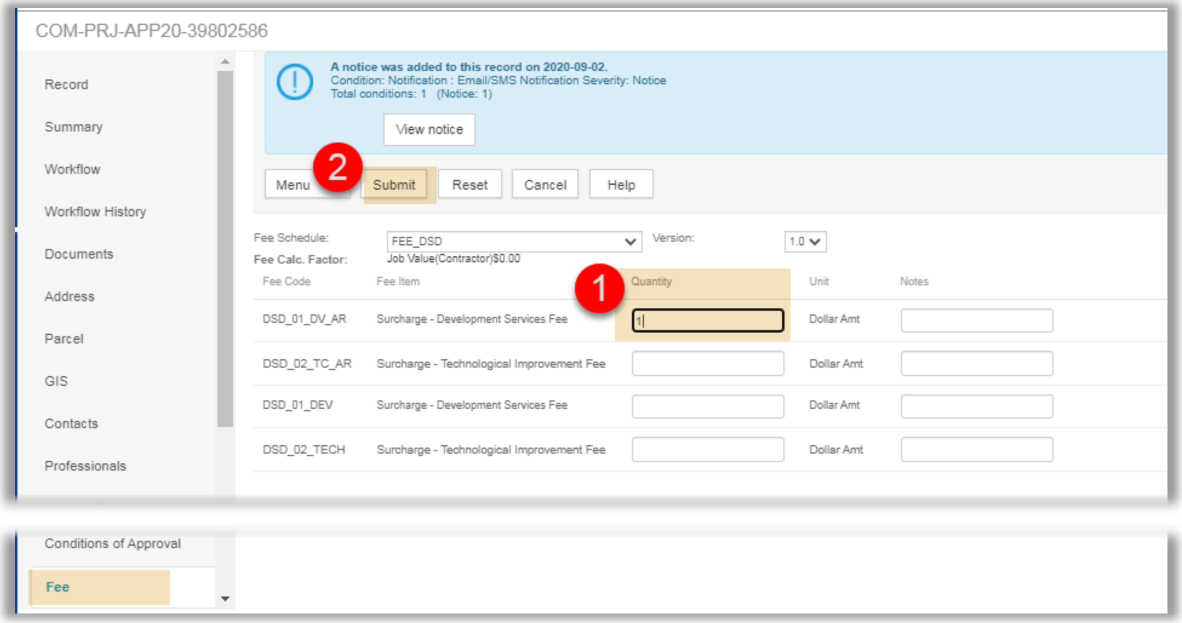
At times you may need to manually add a fee from another record type. ***Note: Workflow instructions for adding fees from other records is discussed in application-specific training.***

Adding Fees from other Records

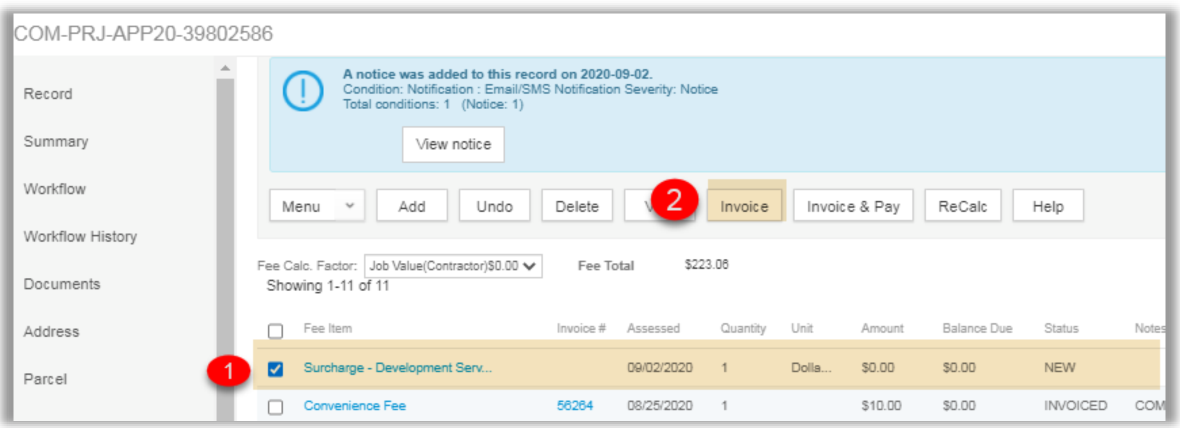
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Fees Tab. The Fees page displays.
3. **Click** the Add button. A list of fees applicable to the specific application display.
4. **Click** the Fee Schedule drop-down menu arrow to display drop-down menu options (shown).



5. **Select** the Record type you need to add a fee **from**. The fees applicable to the record type you selected display.
6. **Type** the Quantity of fees (#1).
7. **Click** Submit (#2).



8. The fee is added to the Fee list. Note the Status column reads NEW (shown). **Click** the box to the left of the Fee Item name (#1).
9. **Click** Invoice (#2).



10. The Fee status changes to INVOICED.

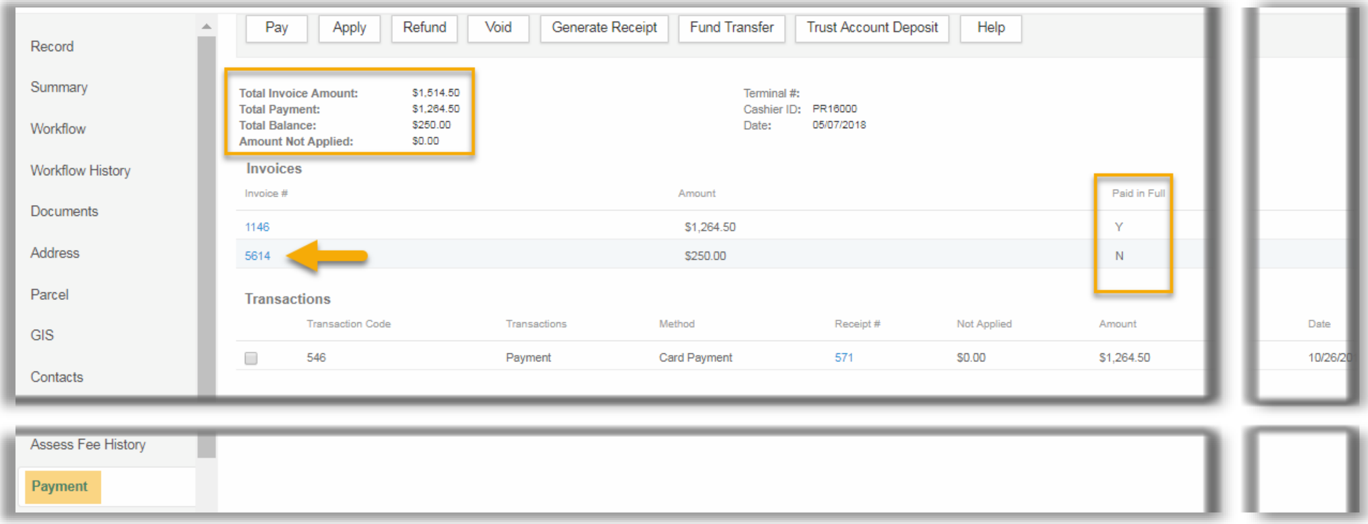
Voiding a Fee

Users are able to void only **unpaid** fees, as needed. ***Note: Workflow instructions for Voiding Fees is conducted in application-specific training. Use this function only as instructed by business processes approved by Supervisor.***

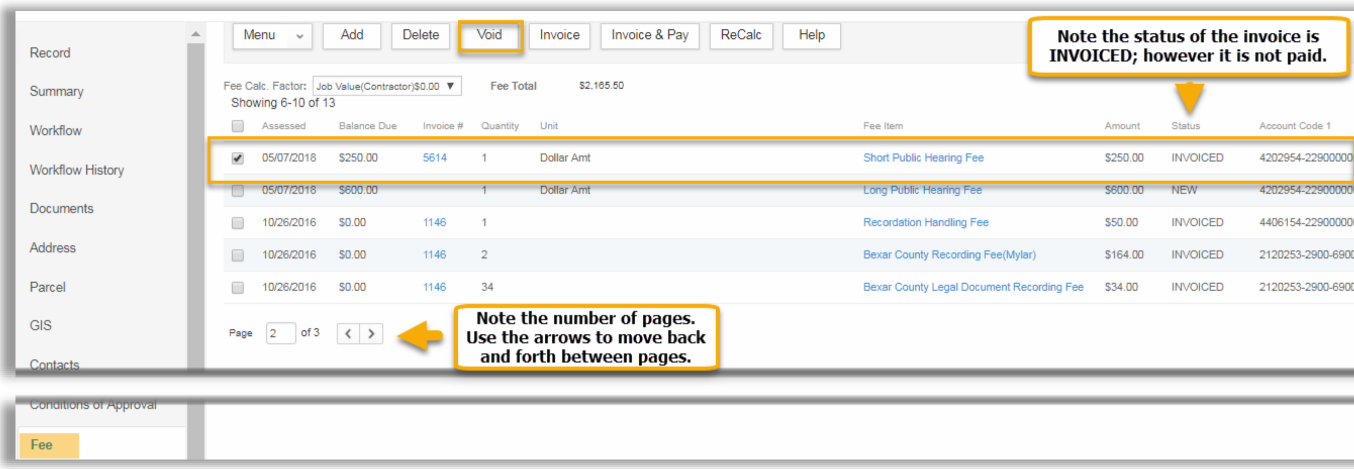
To Void an Unpaid Fee

1. **Retrieve** the record. From the Record's navigation bar, **click** the Payments Tab.

2. **Verify** the balance. **View** the Paid in Full column to confirm the Invoice is not paid (shown). Y=Yes, N=No.

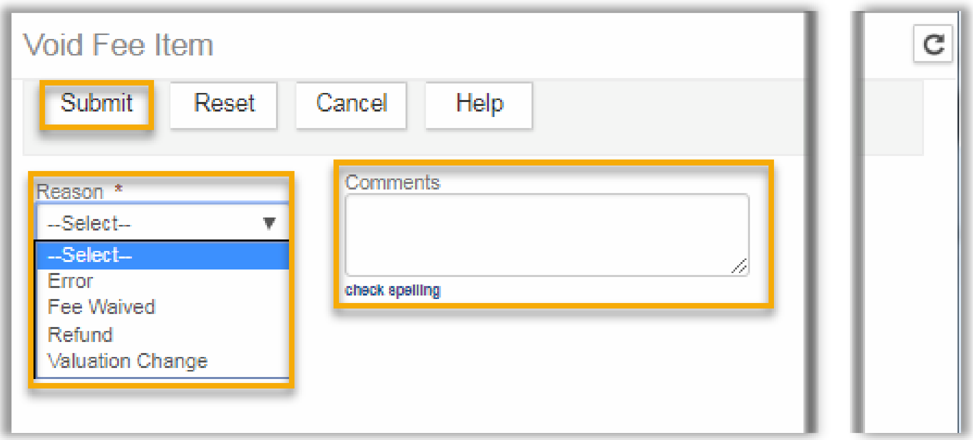


3. Next, **click** the Fee Tab from the record's navigation bar (shown). **Locate** the invoice to void.

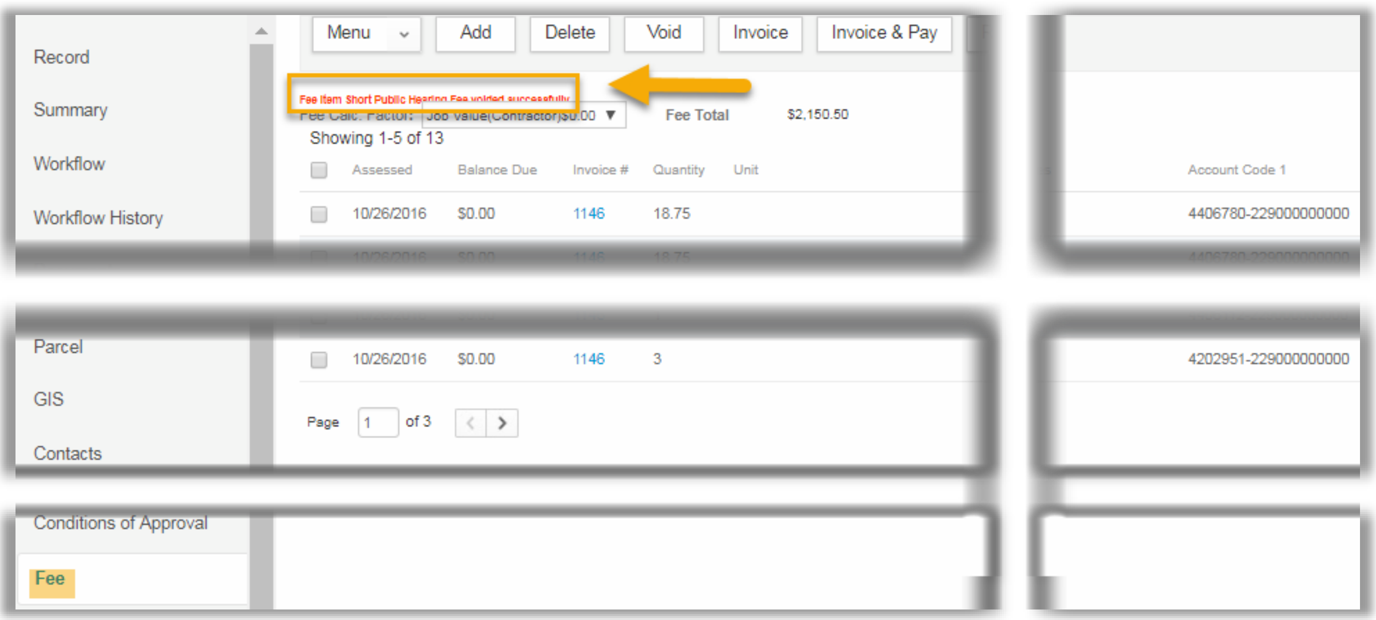


4. **Check** the box to the left of the invoice to select it (shown).

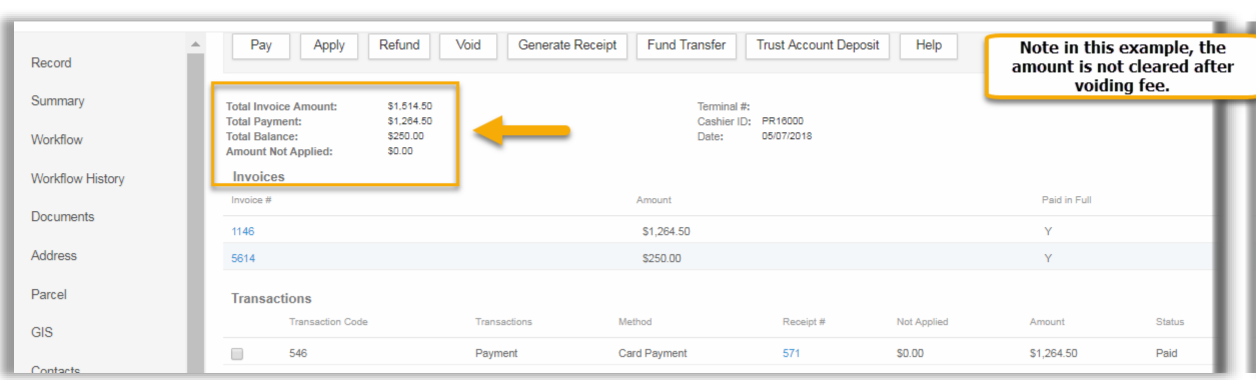
5. **Click** Void (shown). The Void Fee Item page displays (shown).



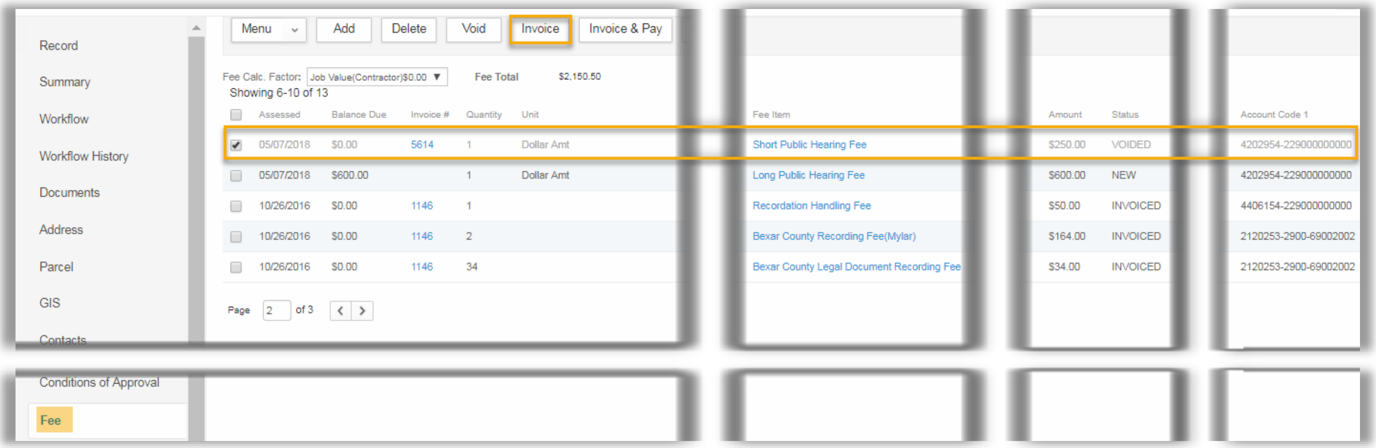
6. **Use** the drop-down menu from the Reason required field to **select** a reason (shown).
7. **Type** Comments, as applicable, in the Comments text field box (shown).
8. **Click** Submit (shown).
9. BuildSA displays a *Fee item voided successfully* message after voiding fee (shown).



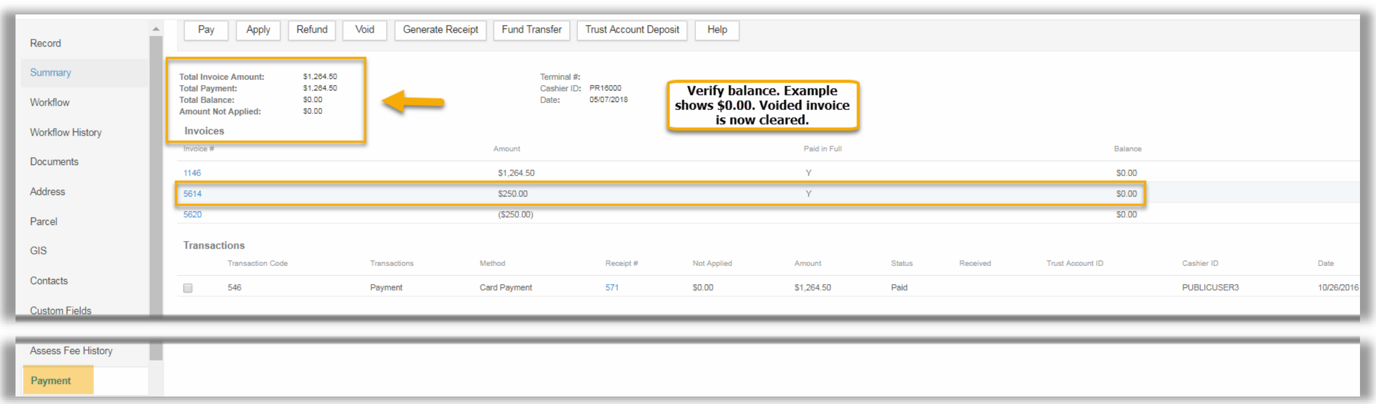
10. From the Record's navigation bar, **click** the Payment Tab (shown).
11. **Confirm** the invoice is cleared by reviewing the Total Balance information (shown).



12. If balance displays as not cleared, **click** Fee Tab to conduct the clearing process (shown).

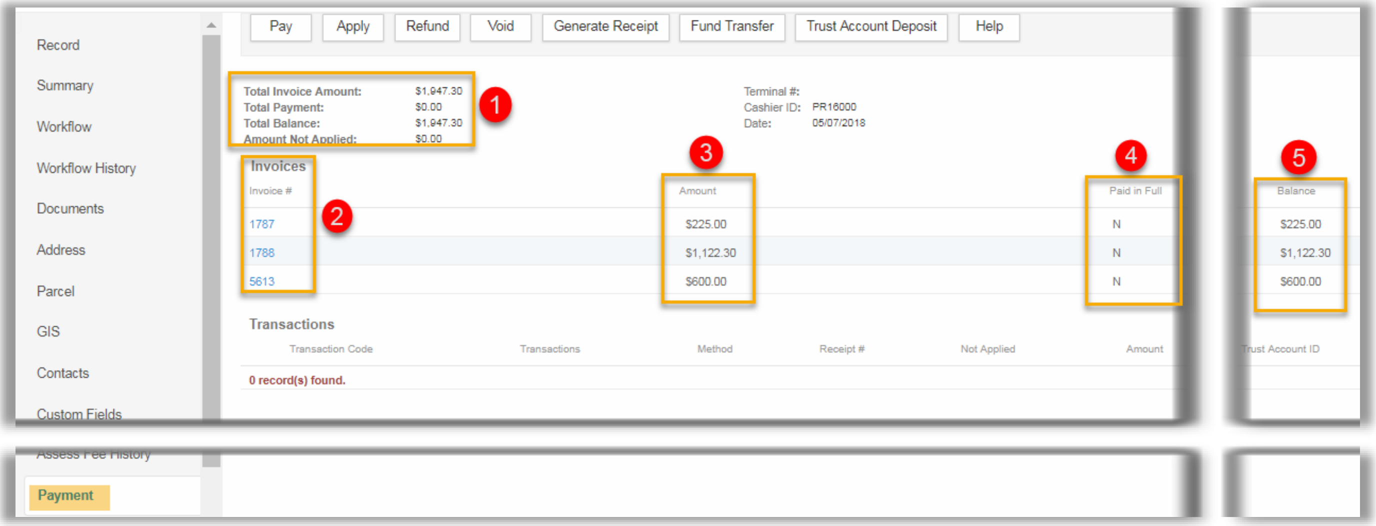


13. **Locate** the invoice. **Click** the box to the left of the VOIDED invoice to select (shown).
14. **Click** Invoice (at this point, end-user is invoicing the Void) (shown).
15. Next, from the Record's navigation bar, **click** the Payment Tab once more (shown). **Verify** balance reflects voided invoice amount or that a credit is reflected (shown).



The Payment Tab

Use the Record's Payment Tab of a Record to view payment information (shown).

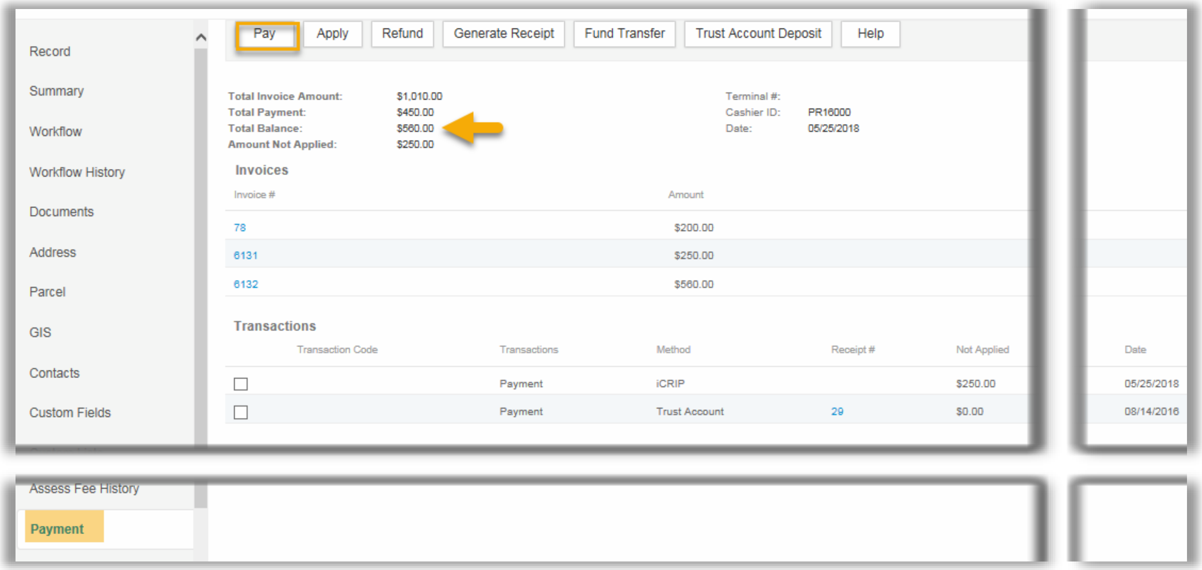


1	BuildSA displays total invoice amount and balance due.
2	Click the Invoice # hyperlink to access invoice. Print invoices. Displays bar code.
3	Amounts of invoices are displayed.
4	Paid in Full column displays a Y or a N to indicate whether invoice is paid.
5	Balance column displays balance amount of each invoice.

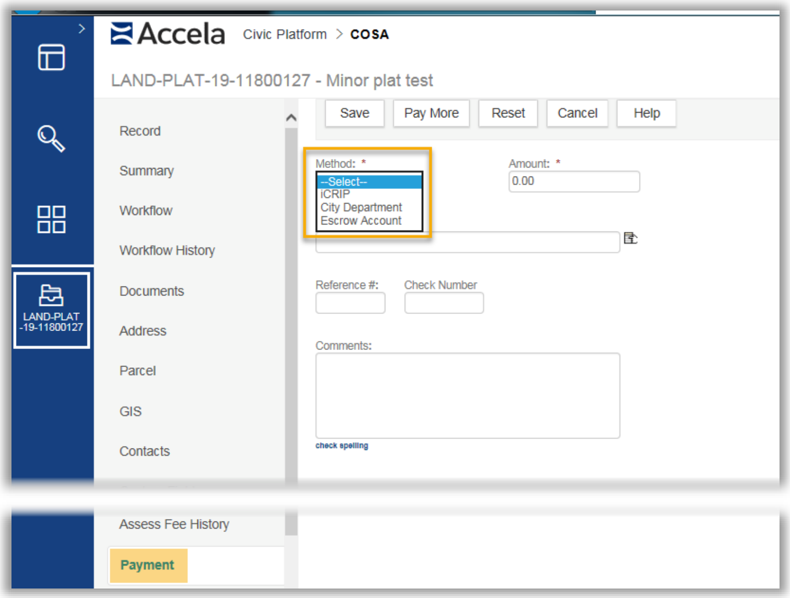
Payment of Fees

Important: The Payment of Fees function is only for use in accordance with business processes and requires Supervisory approval. Do not use this function without your supervisor's approval!

1. From the Record's navigation bar, click the Payment Tab.



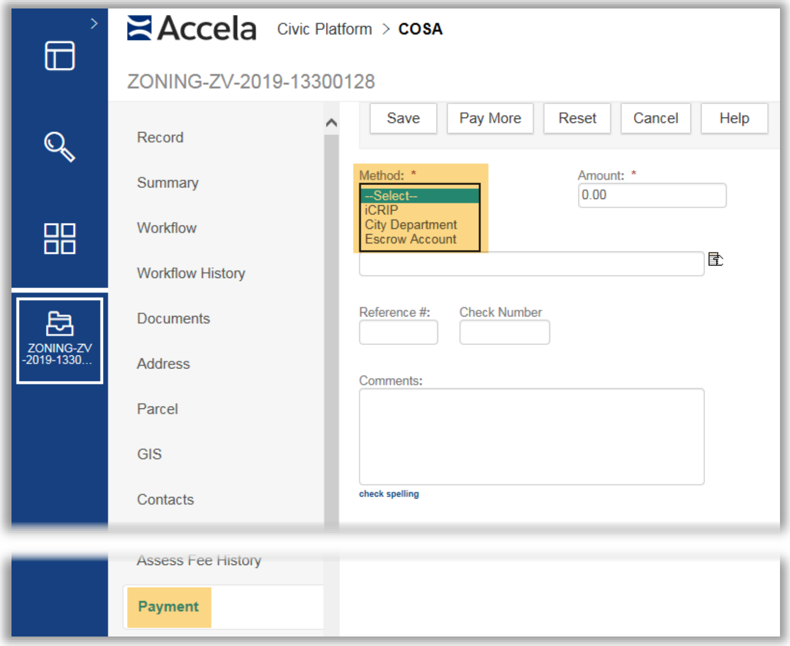
2. **Click** the Pay tab (shown). The Method of Payment page displays. **Select** the Payment Method type by clicking the Method drop-down menu arrow (shown).

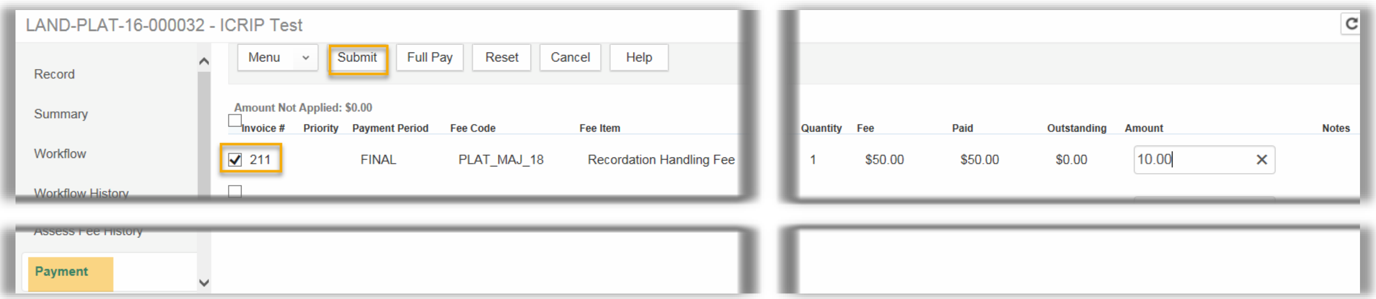


3. Once the Payment Method type is selected, the Comments text field becomes a required field. **Type** comments applicable.

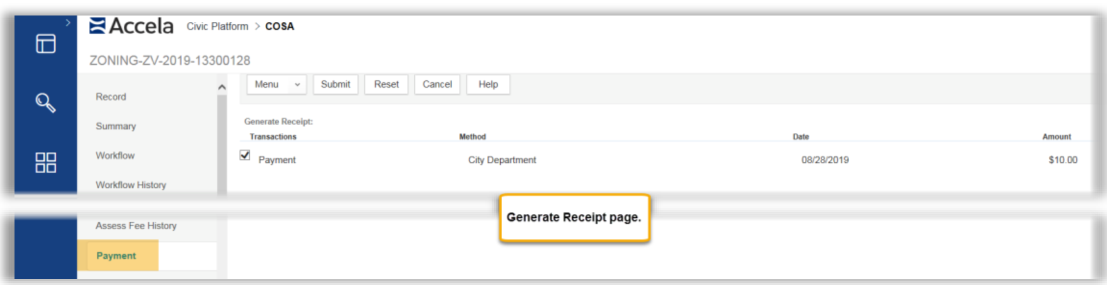
❖ ***Note: Fees are not payable individually unless a customer pays at the Cashier window. If using the Record's navigation bar to pay, all fees must be paid at the same time.***

4. **Verify** the Amount.
5. **Click** Save.

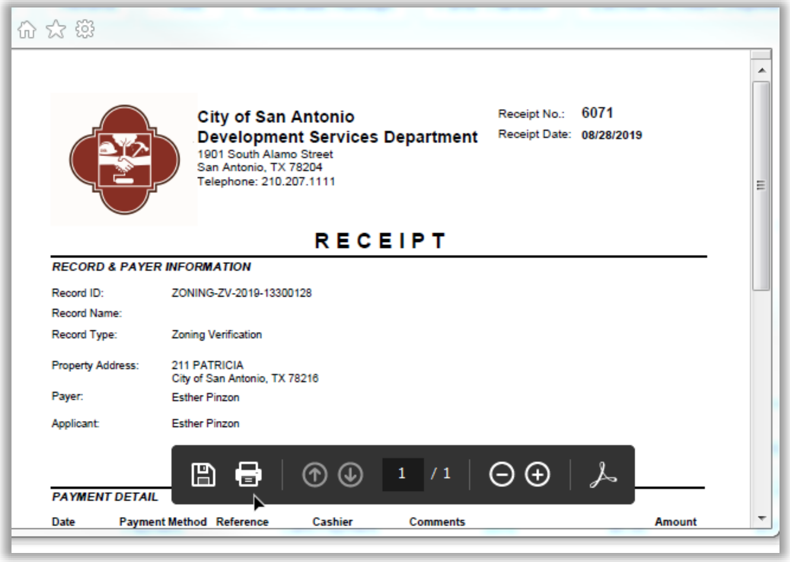




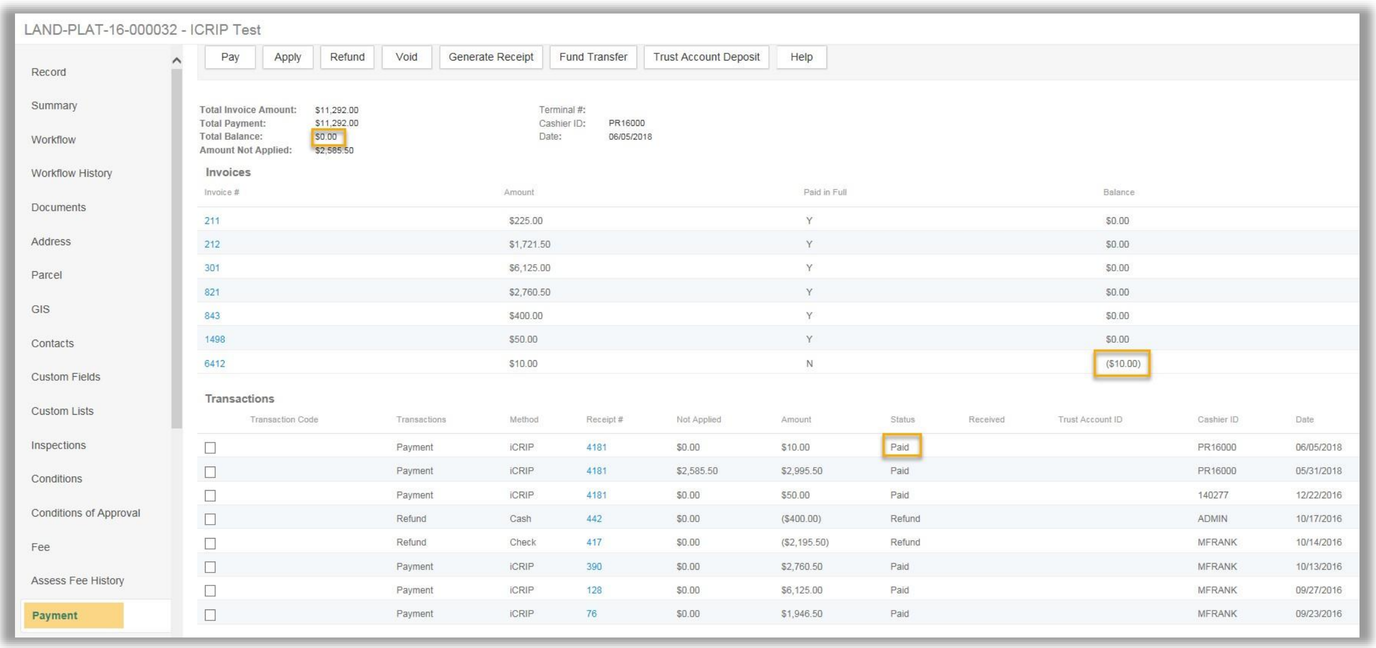
6. **Click** the box to the left of the Fee Item you wish to pay (shown).
7. **Click** Submit (shown).
8. BuildSA displays a Generate Receipt page. **Click** the box to the left of the receipt you wish to generate (shown).
9. **Click** Submit.



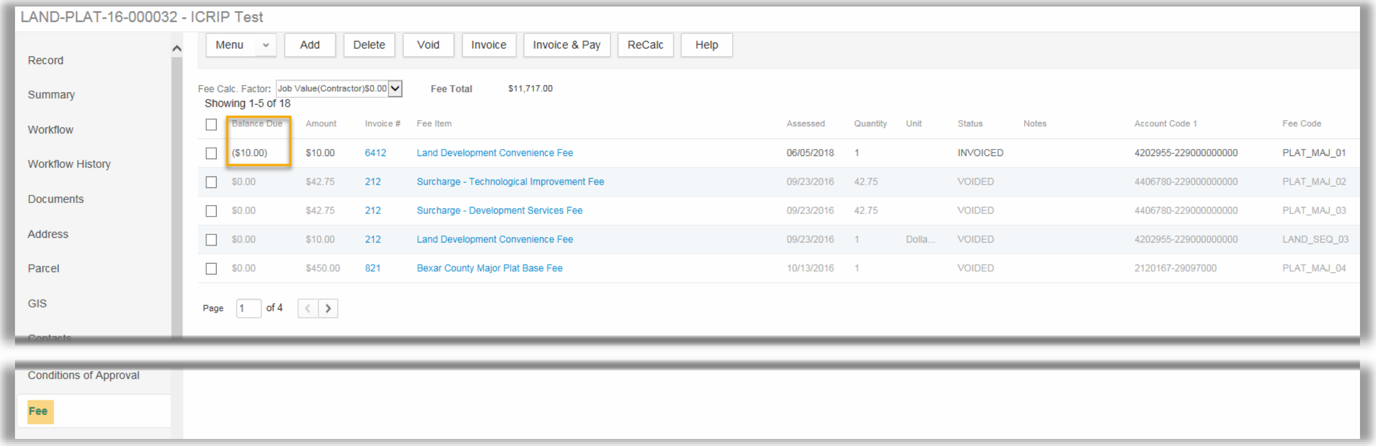
10. The Receipt(s) is generated (shown). You are able to print/save at this time.



11. Return to the Payment Page. Note the fee is listed as a credit (shown). The Status column in the Transactions section displays as Paid. The total balance due is $0.00.



12. Return to the Fee Page. Note the Balance Due column (shown).

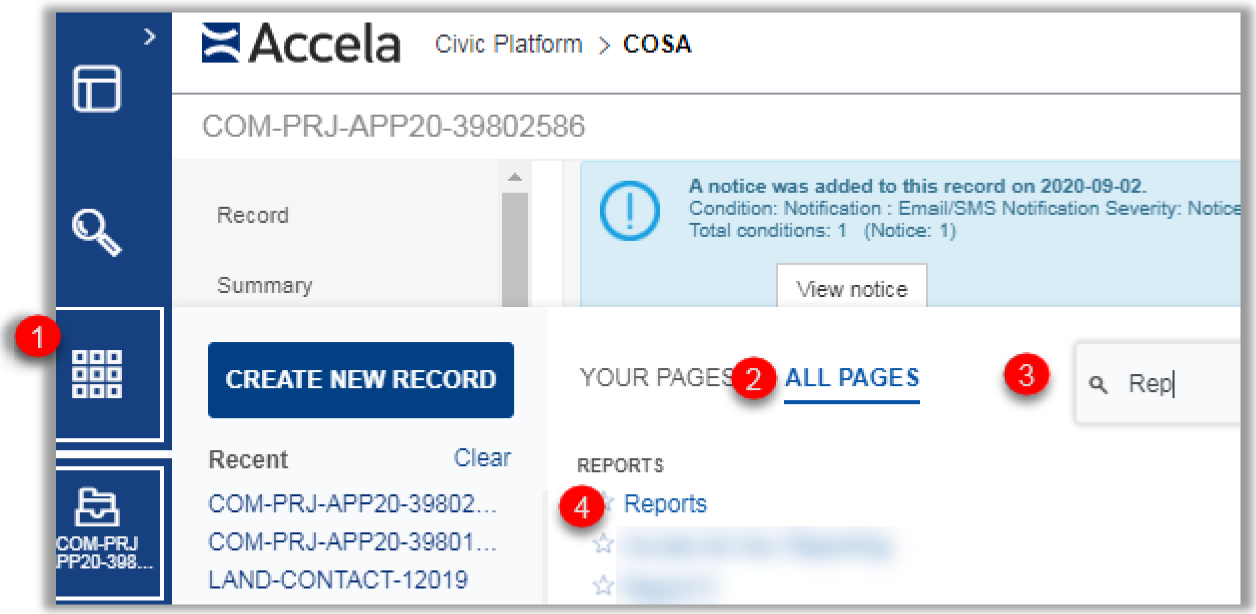


Pre-Existing Reports

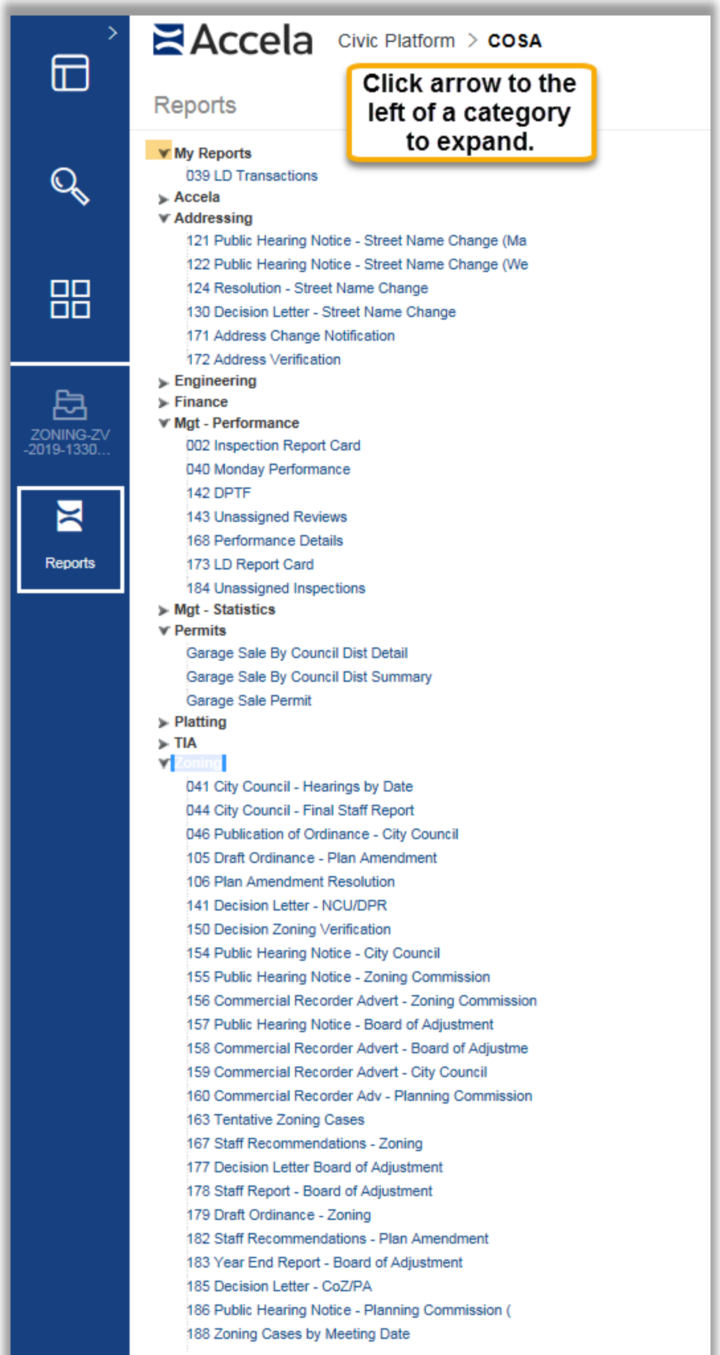
Pre-existing reports are available to all end-users.

Accessing, Viewing and Generating a Pre-Existing Report

1. From the Launchpad (#1) **navigate** to All Pages (#2).



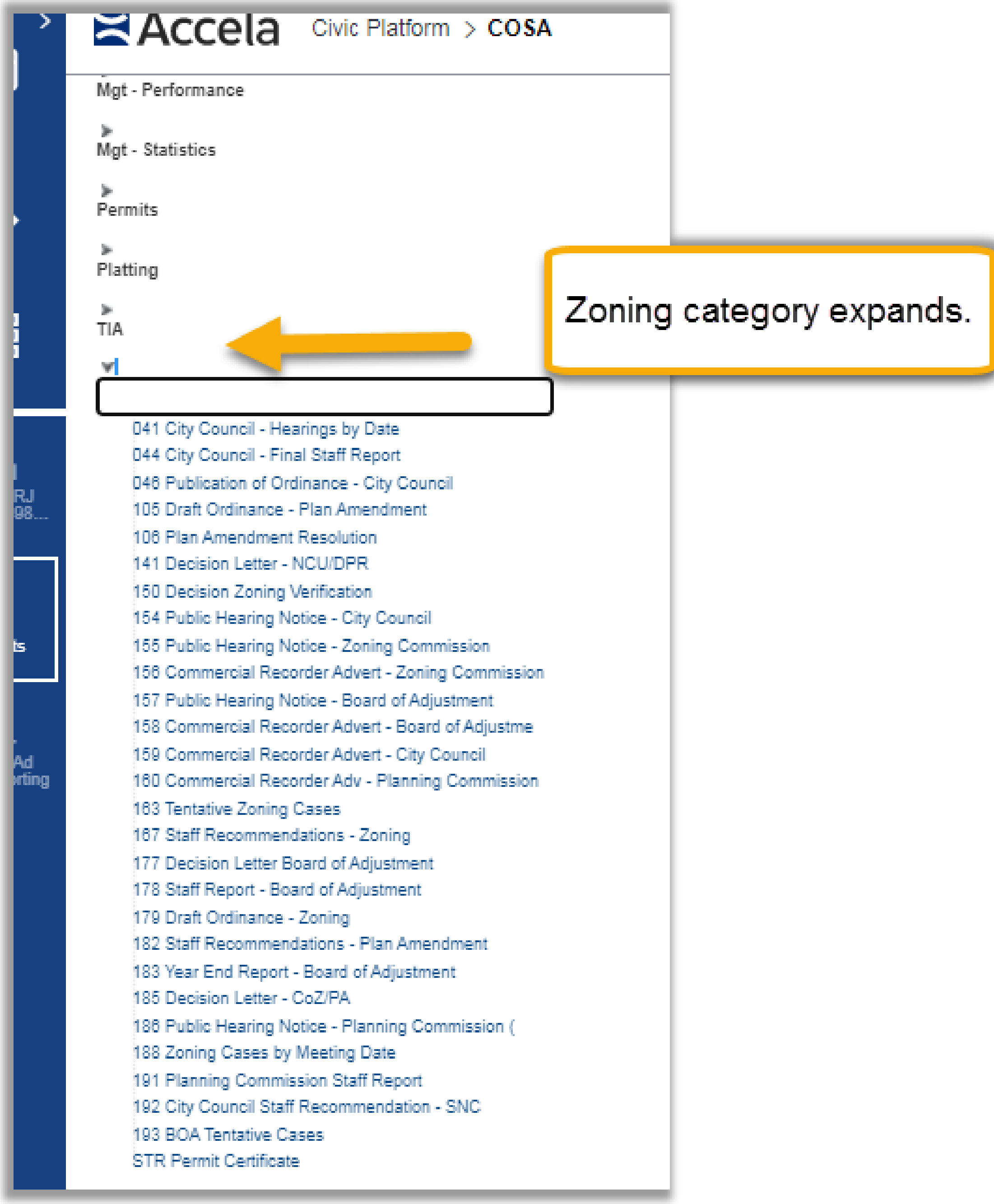
2. In all Pages, **filter** for Reports (#3).
3. **Click** the *Report* hyperlink that displays (#4). The *Report* category page displays (shown).
4. **Click** the arrow to the left of a Category to expand and display hyperlinks for all pre-existing reports contained in the specific category (shown).


Accela
Civic Platform > COSA
Click arrow to the left of a category to expand.
Reports
ZONING-ZV -2019-1330...
Reports
My Reports
039 LD Transactions
Accela
Addressing
121 Public Hearing Notice - Street Name Change (Ma
122 Public Hearing Notice - Street Name Change (We
124 Resolution - Street Name Change
130 Decision Letter - Street Name Change
171 Address Change Notification
172 Address Verification
Engineering
Finance
Mgt - Performance
002 Inspection Report Card
040 Monday Performance
142 DPTF
143 Unassigned Reviews
168 Performance Details
173 LD Report Card
184 Unassigned Inspections
Mgt - Statistics
Permits
Garage Sale By Council Dist Detail
Garage Sale By Council Dist Summary
Garage Sale Permit
Platting
TIA
041 City Council - Hearings by Date
044 City Council - Final Staff Report
046 Publication of Ordinance - City Council
105 Draft Ordinance - Plan Amendment
106 Plan Amendment Resolution
141 Decision Letter - NCU/DPR
150 Decision Zoning Verification
154 Public Hearing Notice - City Council
155 Public Hearing Notice - Zoning Commission
156 Commercial Recorder Advert - Zoning Commission
157 Public Hearing Notice - Board of Adjustment
158 Commercial Recorder Advert - Board of Adjustme
159 Commercial Recorder Advert - City Council
160 Commercial Recorder Adv - Planning Commission
163 Tentative Zoning Cases
167 Staff Recommendations - Zoning
177 Decision Letter Board of Adjustment
178 Staff Report - Board of Adjustment
179 Draft Ordinance - Zoning
182 Staff Recommendations - Plan Amendment
183 Year End Report - Board of Adjustment
185 Decision Letter - CoZ/PA
186 Public Hearing Notice - Planning Commission (
188 Zoning Cases by Meeting Date

Generating a Pre-Existing Report

1. From the Report category groups, **click** the hyperlink for the pre-existing report you want to generate.

2. In this example, the **Zoning** category is shown. **Click** a report's hyperlink to open.



3. **Complete** the fields displaying for the report you've selected. **Click** Submit. Reports display in Excel, Word and other formats.

4. Example of a report shown below:

City of San Antonio
Development Services Department
Inspections Performed as Scheduled
7/2/2020 to 9/2/2020

IAS ACCREDITED Building Department

Counts

Inspection Type	Same Day	1 Day	2 Day	3 Day	4-5 Days	Over 5 Days	Total Count
Concrete Inspection							
Drainage Inspection							
Final Inspection							
Street Inspection							
TOTAL PLAT INSPECTIONS							
Pre-Final Inspection							
Site Visit							
Warranty Bond Inspection							
ALL INSPECTIONS	0	0	0	0	0	0	0

Percentages

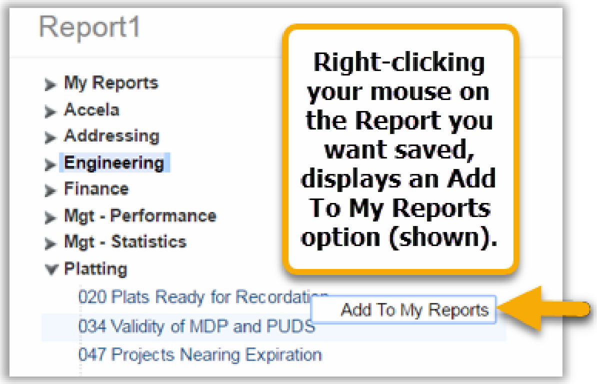
Inspection Type	Same Day	1 Day	2 Day	3 Day	4-5 Days	Over 5 Days	Total Count
Concrete Inspection							
Drainage Inspection							
Final Inspection							
Street Inspection							
TOTAL PLAT INSPECTIONS							
Pre-Final Inspection							
Site Visit							
Warranty Bond Inspection							
ALL INSPECTIONS							

Remember BuildSA is web-based and information updates continually.

Saving Pre-Existing Reports to My Reports

A report category titled *My Reports* is available on the *Reports* page. You may copy the link of any of the reports listed on the Reports page categories to your personal *My Reports* category, enabling you to create a short cut to mostly used reports.

1. **Navigate** to the *Report* page.
2. **Click** the arrow to the left of the Report category containing the report you want added to your *My Reports* folder (shown). Clicking the arrow to the left of the Report category expands the category and displays all pre-existing reports.
3. **Right-click** your mouse on the report you want moved to the *My Reports* category (shown).



4. **Right-click** on *Add to My Reports*. BuildSA copies the report link in to your *My Reports* category.

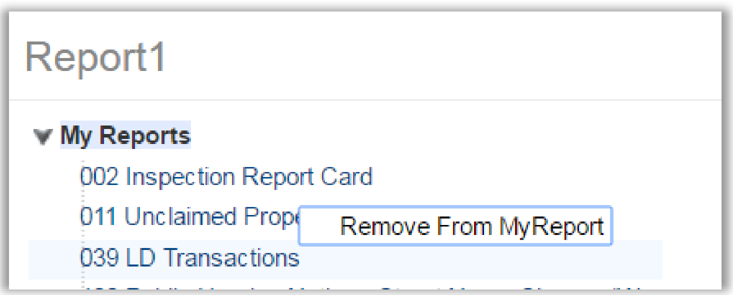
❖ ***IMPORTANT: Adding a Report to My Report Category does not remove the report from the general category list. The report remains available to all end-users.***

Removing a Report From My Reports Category

1. **Navigate** to the *Report* page.

2. **Expand** the *My Reports* category. BuildSA displays the reports available in the *My Reports* Category.

3. **Right-click** on the hyperlink of the report you want to remove from your short cut list. A *Remove from My Report* message displays (shown).



4. **Right-click** on *Remove from My Report.* BuildSA removes the selected report from the *My Reports* Category.

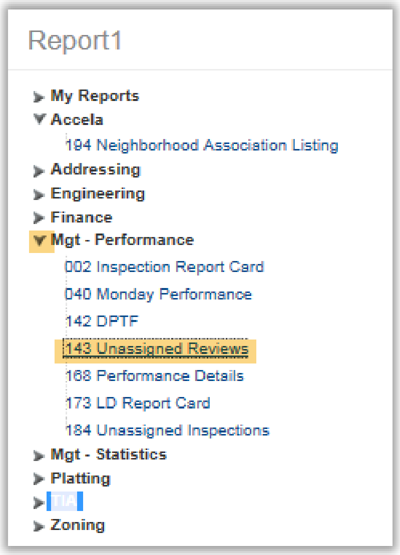
Unassigned Reviews Report

The *Unassigned Reviews Report* is a very useful tool to help you in the assignment of tasks and in reviewing the area's daily work load.

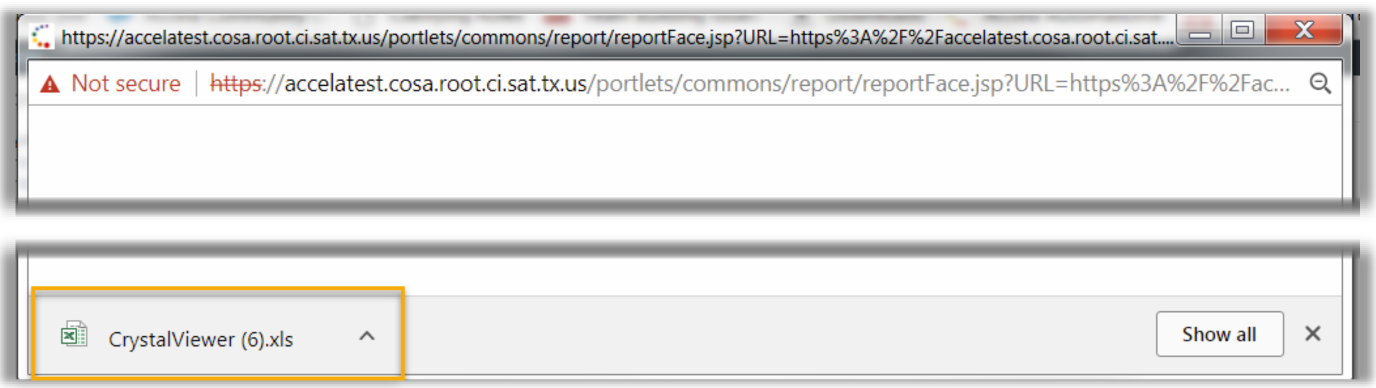
To generate the *Unassigned Reviews* report

1. From the *Launchpad*, **click** *All Pages*.

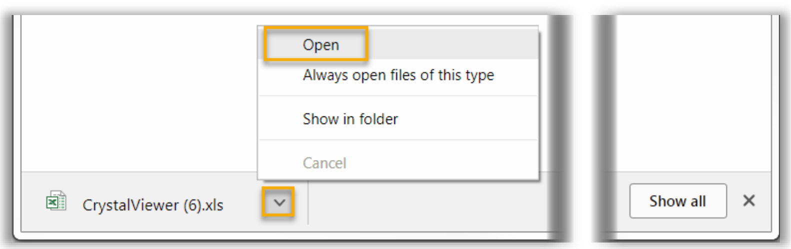
2. **Filter** for *Reports*.
3. **Click** the *Reports* hyperlink. The *Report* categories list displays (shown).
4. **Click** the arrow to the left of *Mgt-Performance* category to expand the category (shown).



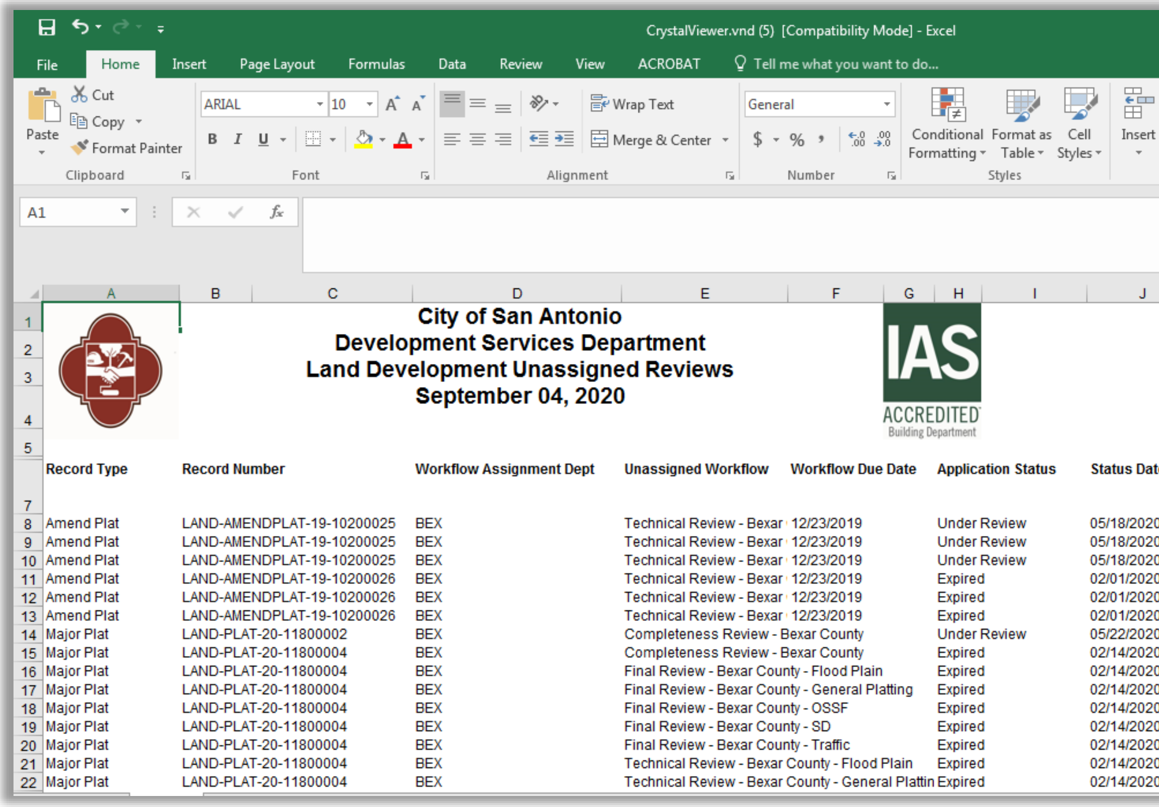
5. **Click** *143 Unassigned Reviews* hyperlink (shown).
6. The CrystalViewer displays. **Click** the arrow (shown).



7. **Click** *Open* (shown).



The Report displays in Excel format. Manipulate data as needed (shown). Note: the information is in real-time and changes continually.



City of San Antonio
Development Services Department
Land Development Unassigned Reviews
September 04, 2020

Record Type	Record Number	Workflow Assignment Dept	Unassigned Workflow	Workflow Due Date	Application Status	Status Date
Amend Plat	LAND-AMENDPLAT-19-10200025	BEX	Technical Review - Bexar	12/23/2019	Under Review	05/18/2020
Amend Plat	LAND-AMENDPLAT-19-10200025	BEX	Technical Review - Bexar	12/23/2019	Under Review	05/18/2020
Amend Plat	LAND-AMENDPLAT-19-10200025	BEX	Technical Review - Bexar	12/23/2019	Under Review	05/18/2020
Amend Plat	LAND-AMENDPLAT-19-10200026	BEX	Technical Review - Bexar	12/23/2019	Expired	02/01/2020
Amend Plat	LAND-AMENDPLAT-19-10200026	BEX	Technical Review - Bexar	12/23/2019	Expired	02/01/2020
Amend Plat	LAND-AMENDPLAT-19-10200026	BEX	Technical Review - Bexar	12/23/2019	Expired	02/01/2020
Major Plat	LAND-PLAT-20-11800002	BEX	Completeness Review - Bexar County		Under Review	05/22/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Completeness Review - Bexar County		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Final Review - Bexar County - Flood Plain		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Final Review - Bexar County - General Platting		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Final Review - Bexar County - OSSF		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Final Review - Bexar County - SD		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Final Review - Bexar County - Traffic		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Technical Review - Bexar County - Flood Plain		Expired	02/14/2020
Major Plat	LAND-PLAT-20-11800004	BEX	Technical Review - Bexar County - General Plattin		Expired	02/14/2020

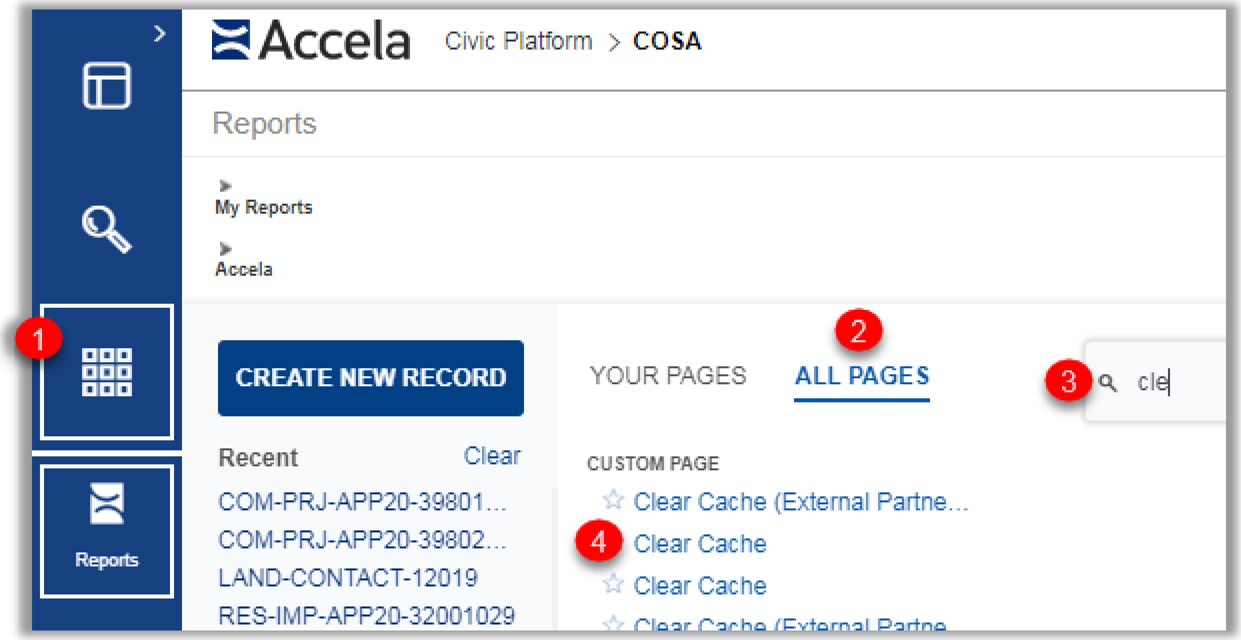
Note: If you experience problems generating a report, please contact dsdbuildsasupport@sanantonio.gov

Clearing Your Cache

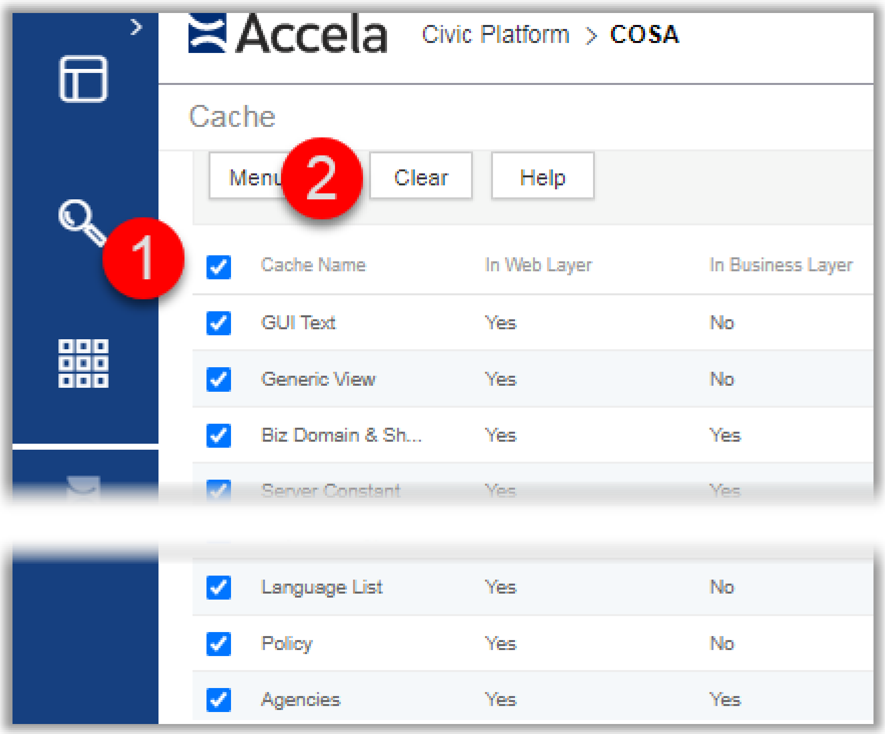
Your browser tends to hold information, and over time this may cause problems with logging in or searching for data. It's always a good idea to **clear** your **cache**, or browser history, and **clear** cookies on a regular basis. Remember to clear your internet browser as well, contact DSD Support Team for help clearing your internet browsers (DSDBuildSASupport@sanantonio.gov)

To clear your cache

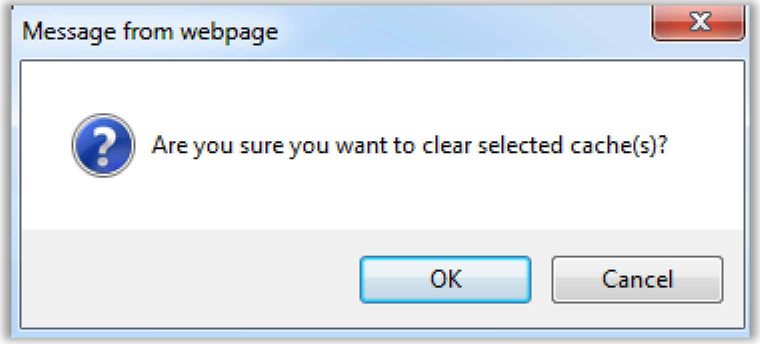
1. From the Launchpad (#1), **click** All Pages (#2). **Filter** for Clear Cache (#3).
2. **Click** the Clear Cache link (#4).



3. The Cache page displays (shown). **Click** the box to the left of Cache Name (#1). This highlights the entire column (shown).
4. Next, **click** the Clear tab (#2).



5. After clicking Clear, BuildSA displays confirmation message (shown). **Click** OK.



6. BuildSA displays the message Cache(s) cleared successfully (shown).

Viewing Escrow Account(s) Balances

Three options: Reports/Records/Escrow Account

An Escrow Account application may be submitted online through ACA or as a paper application to the intake counters at DSD.

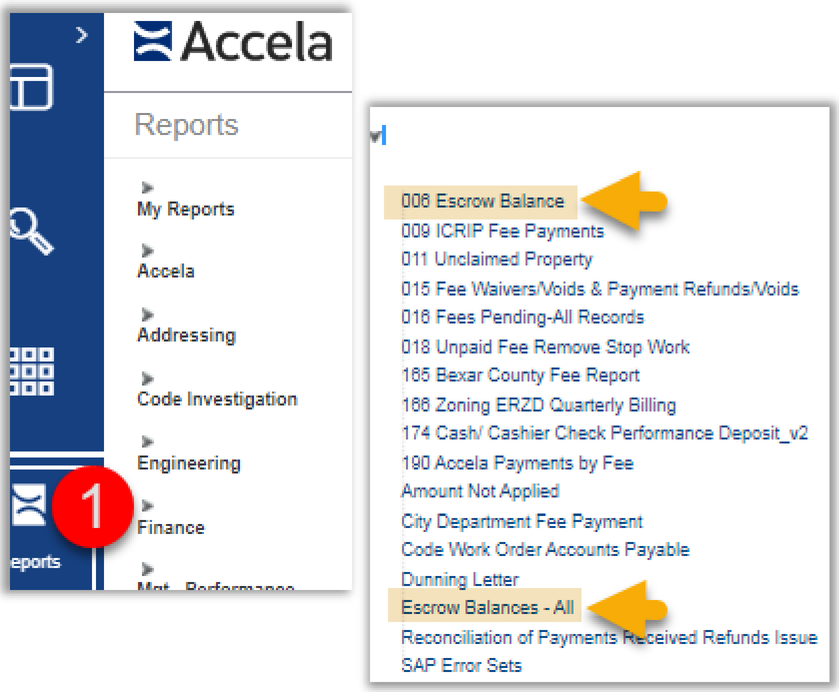
Customers must have a Citizen Access Portal account to create an Escrow Account in BuildSA.

- ***IMPORTANT: Escrow Account Owners are responsible for managing their accounts using their account login in the Citizen Access Portal.***

Using the Reports functionality

1. From the Launchpad (#1), **click** All Pages (#2).
2. **Filter** for Report (# 3). **Click** the Reports link (#4).

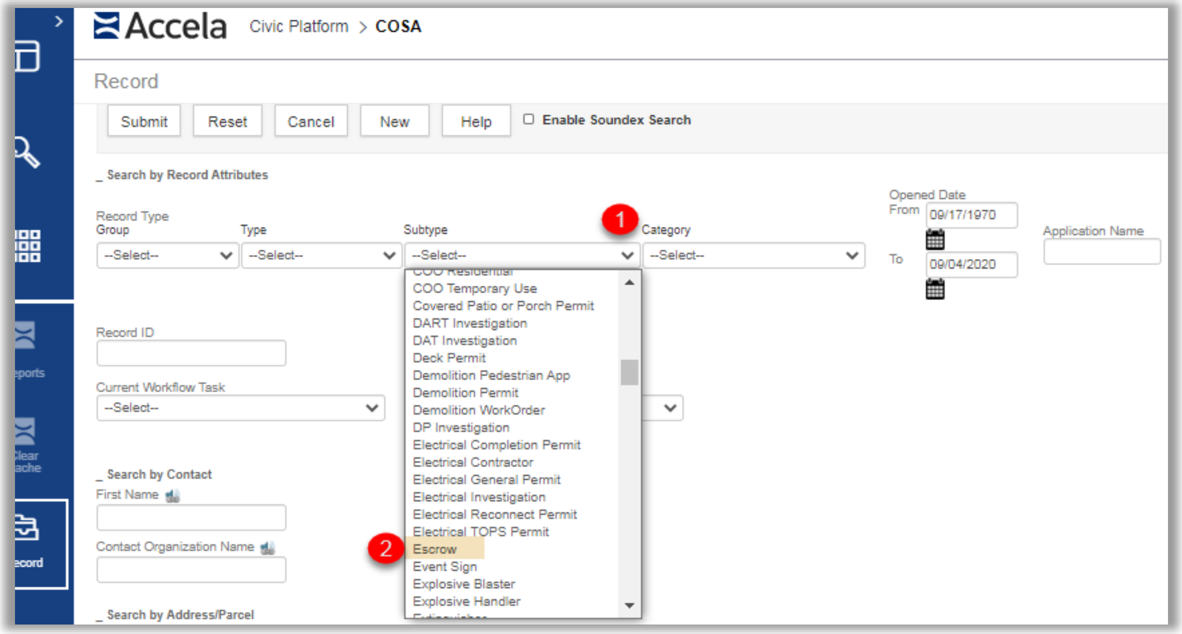
3. **Click** the arrow to the left of Finance to display all Finance report categories (# 1).



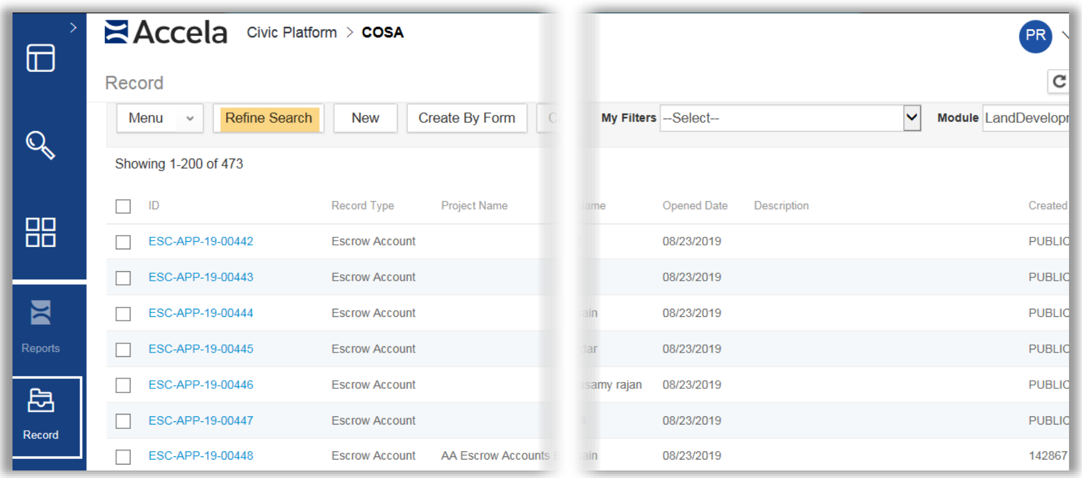
- To view *Individual Escrow Account* balances (must have Escrow Account number to generate report) select **Report # 006-Escrow Balance (**shown).
- To view *Escrow Account Balances for all Escrow Accounts*-Click **Escrow Balances-All** (shown).

Using the Records Page functionality

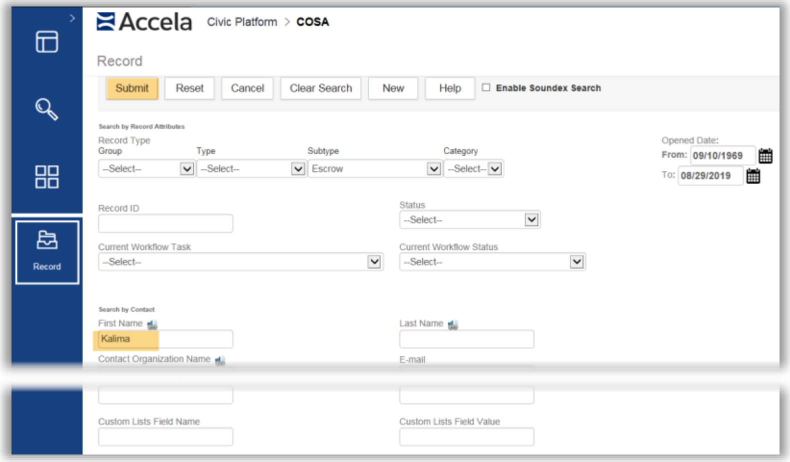
1. From the Launchpad, **click** All Pages.
2. **Filter** for Record. **Click** the Record link.
3. From the Record Search page, **click** the Subtype drop-down menu arrow (#1).
4. **Click** to select Escrow (#2).



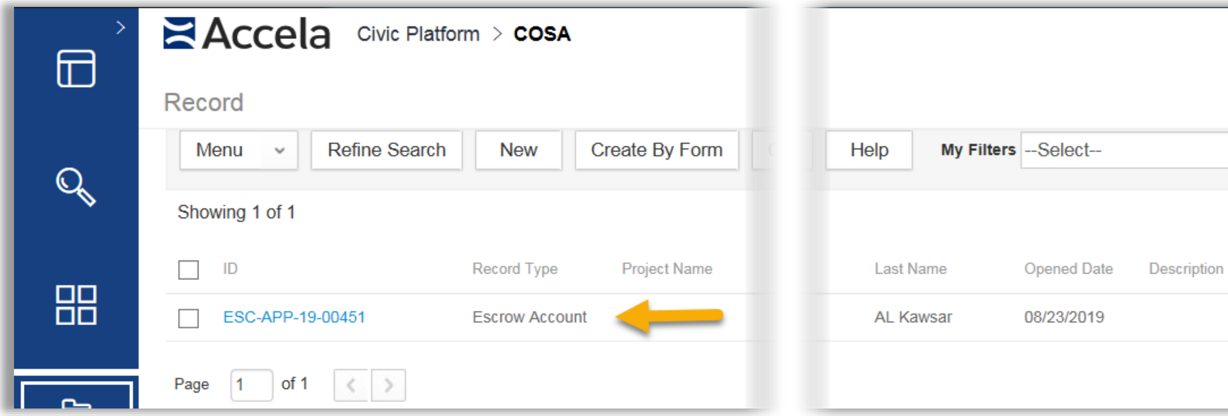
5. **Click** Submit. BuildSA displays all Escrow Accounts in the system (shown).
6. **Click** *Refine Search* to find a specific Escrow Account (shown).



7. The Record Search page displays once again. **Type** additional known information (shown). **Click** Submit.



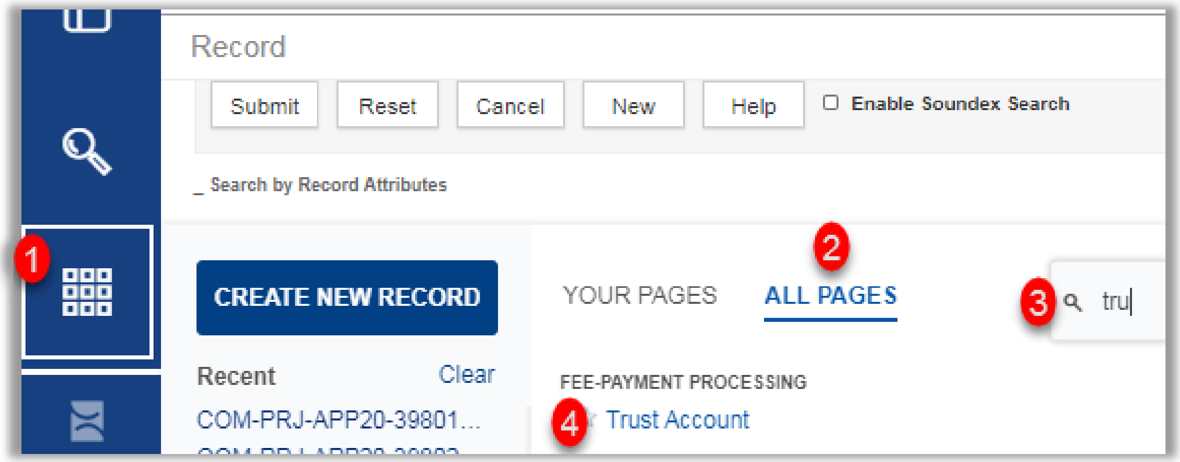
8. The system searches and returns the Escrow Account. **Click t**he blue text link to open Record.



Using the Escrow Account Page Functionality

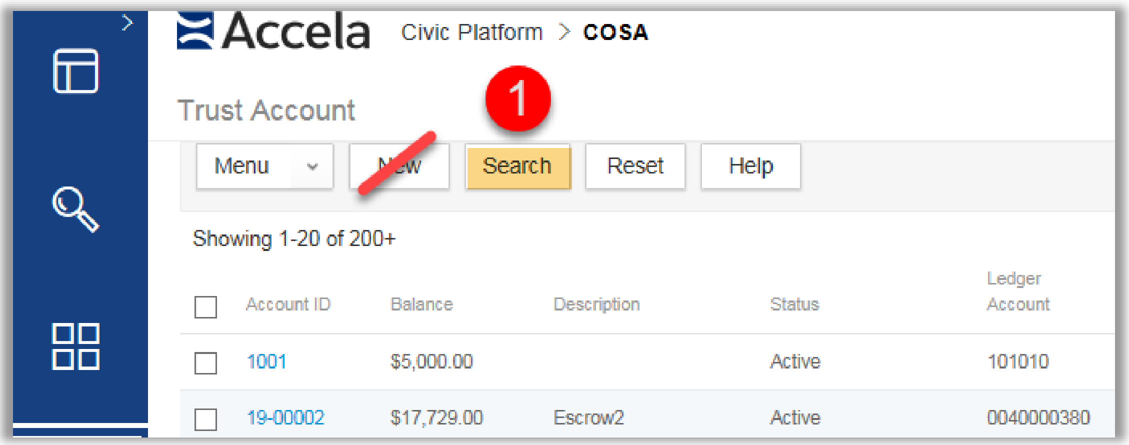
❖ ***IMPORTANT: Escrow Accounts are not created using this page. The New button is an out-of-the-box functionality and not for use.***

1. From the Launchpad (#1), **click** All Pages (#2).
2. **Filter** for Trust Account (#3). **Click** the Trust Account link (#4).

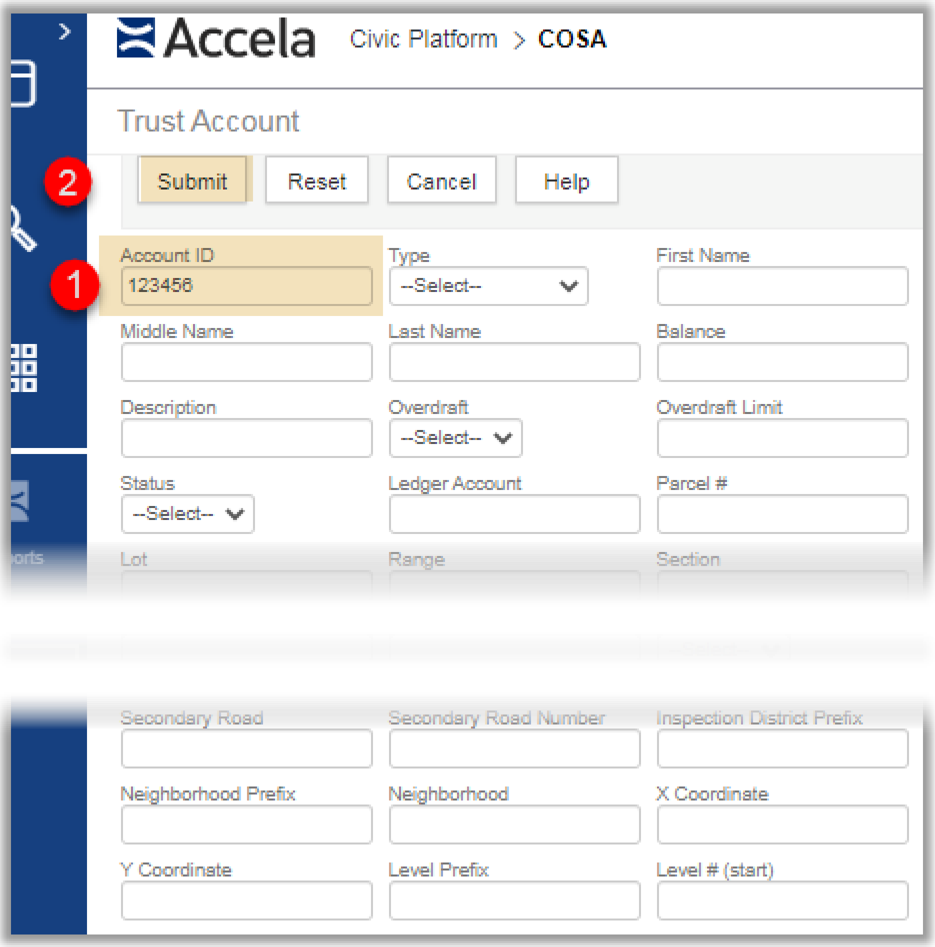


3. The Trust Account page displays (shown). **Click** Search (#1).

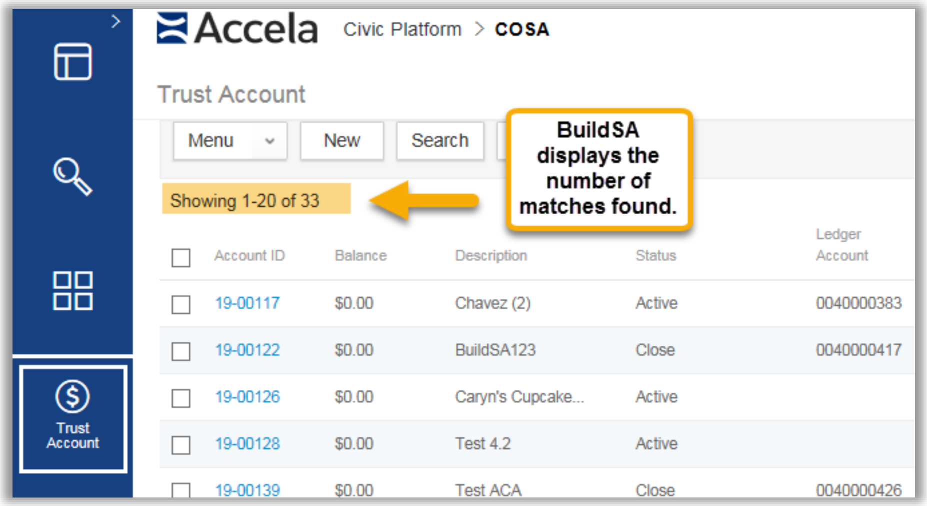
IMPORTANT: Escrow Accounts are not created using this page. The New button is an out-of-the-box functionality and not for use.



4. **Type** account ID (if known) (#1) or other information known**. Click** Submit (#2).



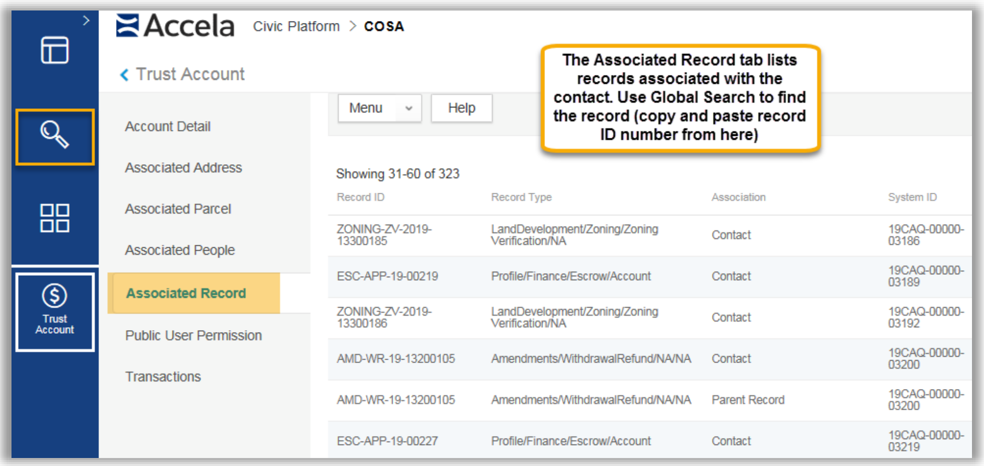
5. The system returns all matches found in Escrow Account where the Contact is either an Authorized User, an Escrow Owner or associated with a record. The number of matches found displays at the top of the page (shown).



Tip: Click any column heading to sort information in the column.

6. **Locate** the Escrow Account for which you are search and click its hyperlink. The Trust Account Detail page displays (shown).

   Note the Trust Account's Navigation bar. The Associated Record tab displays all records on which the Contact is associated (shown).



7. The Associated People tab displays the contacts (Individual or Organization) associated with the Escrow, or Trust, account (shown).

   Note: find the Escrow Owner for the account in the <u>Record</u>---listed under the <u>Contact Tab</u>.

Glossary

This section contains a listing of terms related to BuildSA.

ACA (Accela Citizen Access) (Citizen Portal)	A configurable Web-based application that integrates with the Accela Civic Platform to provide citizens with online access to government services and information.
GIS (AGIS-Geographic Information System)	A software application that integrates with Accela Automation to provide automated maps from a central database. The maps can provide a geographic representation of all land-use, zoning, and infrastructure information associated with a parcel, permit, inspection, or plan, as well as many other functions.
Accela **Mobile App**	A mobile government application that integrates with Accela Automation to extend processing capabilities to the field. This system is useful for activities such as inspections, investigations, disaster response, code enforcement, work orders and service requests.
Actions Button	On the Tasks Dashboard List View: provides the user access to commands that can be applied to one or more task items.
APO	Addresses are physical locations related to parcels. Parcels are pieces of land with specific locations and legally defined boundaries. Parcels can have multiple addresses. An owner is associated with specific parcels and is typically the main person responsible for a parcel, as well as the point of contact.
Civic Platform	Accela's enterprise software application that provides government agencies with a complete solution to automate their workflows, manage forms, track activities, perform cashiering, and many other critical tasks. This software can automate the activities of a single department or manage the services of an entire jurisdiction. Accela's Civic Platform also connects separate systems and users across departments by integrating an agency's enterprise information and providing a personalized and easy-to-use interface to access the information.
Cloning	The act of creating a duplicate permit application, asset, or service request using an existing permit application, asset, or service request as a template. When you clone a record, you are creating a duplicate with a new record ID number. The source record is known as the parent, and the **new cloned record is the child**. When more than one record is cloned from a source parent, each cloned record is a sibling to the others.
Condition	A condition is a requirement applied to a record (or component of a record) that the applicant must fulfill to qualify for approval. Although conditions do not necessarily impose holds, they can prolong the permitting process until they are met. There are four severities that can be assigned to conditions: **Lock:** Essentially, the record is locked until the condition is met. **Hold:** Prevents you from scheduling or updating inspections, processing workflow tasks, and processing fees or cashiering. **Notice:** Indicates special instructions to the person completing the record. Notices do not inhibit the record process in any way.

	Required: Unique to workflow tasks, the required severity indicates a certain activity or field must be completed before the user can proceed to the next activity.
Contacts	Any significant party (excluding licensed professionals) who participates in the record's process, such as the applicant, billing contacts, or legal contacts.
CSV (Comma Separated Value)	This file format is a portable representation of a database that you can view and modify with Excel. You can create a report from a list page by exporting all of the records in the list to a CSV file.
Custom Fields	COSA-defined fields that are unique to a record type, checklist item, inspection, workflow task, or reference object such as an address, parcel, owner, contact or license professional.
Dashboard	Task-centric and Map-centric view of records, inspections, and reference objects within the system.
Dashboard Toggle	Panel at the top of the Main menu Bar that allows you to switch between the Task Dashboard and the Map Dashboard.
Field	An area in the database and interface that contains a particular type of data.
Filter	My Searches available on the Task Dashboard that show commonly searched items by type, assignment, due dates or any other combination of search criteria available for inspections, meetings, or tasks.
Global Search	Search tool that allows the user to search by keywords to find records, documents, and reference objects within the system. The global search can be accessed by clicking on the second panel from the top in the Main Menu Bar.
Home Page	The default landing page and starting point for anything a user wants to do within the user interface. This page appears first upon login. Clicking on the COSA name in the upper left-hand corner will return the user to the Home Page. The homepage consists of the Task Dashboard, the Application Bar, the Main Menu, and panels to launch the Launchpad and Global Search features.
Inspection	A general observation of an asset or record. An inspection can include many specific observations.
Launchpad	The Launchpad allows the user to access specific pages (portlets) within the system such as Records, Alerts, Inspections, Sets, etc. Selecting a page from the Launchpad opens the item up into a space that can be pinned to the Main Menu Bar for easy access. The Launchpad is also where the user opens a new application.
Main Menu	Provides a user with the tools to access and organize work spaces as well as find what is needed. The Main menu provides the user with a control pad for adding, finding and addressing content. This menu is docked on the left-hand side of the user interface. This menu contains panels that allow the user to toggle between the Task and Map Dashboards, perform Global Searches, access the Launchpad, and also displays spaces currently open or pinned to the menu.
Parcel	A piece of land, such as a tract or a lot, with a specific location and legally defined boundaries.
Parcel Number	An agency's Real Estate Assessor's parcel number or tax lot number.

Pinned Space	A Space that has been designated by the user to be immediately available within the Main Menu bar.
Primary Address	The principal address for an application or license. Sometimes referred to as the project address, street address, or site address.
Record	A term that represents the identification number of broad range of items or forms that users manage, such as application, case, license, permit, service request and work order.
Record ID	The unique identification number of a record.
Reference Data	Reference data comprises addresses, parcels, owners, contacts, and licensed professionals. Users can search the reference database from within BuildSA and associate this data with records.
Report	The formatted result of a database query that is distributed as a printed form, a letter, or a collection of data.
Space(s)	Any Page, Record, or Reference item selected opens into a new space. These spaces stay anchored to the Main menu until closed. Spaces can be pinned to the Main menu so that they will be available to the user even after the user has logged out and logged back in.
Status	The state of a record, task, or inspection. A status might indicate a phase of a process, such as *Pending, Accepted* or *Failed.*
Task Card and Task Card View	An individual pane within the Task Dashboard that represents an Inspection, Task, Activity, Document review or Meeting. The task card provides information about the item at a glance. Each card contains a link that enables the user to open the item up into a space to get more information. A blue link indicates a hyperlink and if the Task title appears in black, the user does not have permission to act on the task. The Task Card Options menu allows the user to identify the task type as well as act upon the task accordingly. This panel also lists relevant records or reference information. Each card lists Due Dates, Scheduled Times, Comments and other information as appropriate for the task type. Icons are also shown on each card to indicate the presence of conditions.
Task Dashboard	A user's to-do list that is displayed in either a Card View or List View. These views can be toggled by the individual user as desired. Within the task view up to six cards are displayed containing information about Inspections, Workflow Tasks, Document Review Tasks, Activities, or Meetings assigned to the user. A filter button displays My Searches to assist the user with filtering by Due Dates, Status, task Type and other search criteria available.
Task List View	A tabular view of the user's Task Dashboard. This table displays a list of the user's Inspections, Tasks, and Meetings, their Due Dates, any conditions, Status, and concise details about each item. Upon load six items are visible. A 'Load more…' link at the bottom of the space allows the user to expand the list. An Actions button is available within this view to take action on one or more of the items within the list.
Tooltips	A small message that displays when you hover your mouse over a button.

Workflow	A set of tasks COSA defines and follows to process an application. These tasks are the essential steps in the application process. Workflows function as a checklist once an application is submitted.