

BuildSA General Functionality User Guide

Development Services Department

Name _____

Date _____



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Document Control

Date	Author	Version	Change Reference
08/10/2016	Patricia Rosas	1.0	Initial Draft
11/09/2016	Patricia Rosas	1.1	Submitted for Review
02/23/2017	Patricia Rosas	1.2	Complete Re-do
06/13/2017	Patricia Rosas	1.3	Update
07/06/2017	Patricia Rosas	1.4	Update
07/07/2017	Patricia Rosas	1.5	Update
10/9/2017	Patricia Rosas	1.6	Update
10/13/2017	Patricia Cavazos	1.7	Review
10/17/2017	Patricia Rosas	1.8	Update
10/26/2017	Patricia Rosas	1.9	Update
01/09/2018	Patricia Rosas	1.10	Update to new Interface
05/07/2018	Patricia Rosas	1.11	Update
05/22/2018	Caryn Moore/Patricia Cavazos	1.12	Table of Contents Review
05/25/2018	Patricia Rosas	1.12	Update
05/29/2018	Patricia Cavazos	1.13	Review
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06/07/2018	Patricia Rosas/Patricia Cavazos	1.15	Review/Update
07/29/2019	Patricia Rosas/Patricia Cavazos	1.16	Review/Update
09/01/2020	Patricia Rosas/Patricia Cavazos	1.17	Annual Review/Update

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

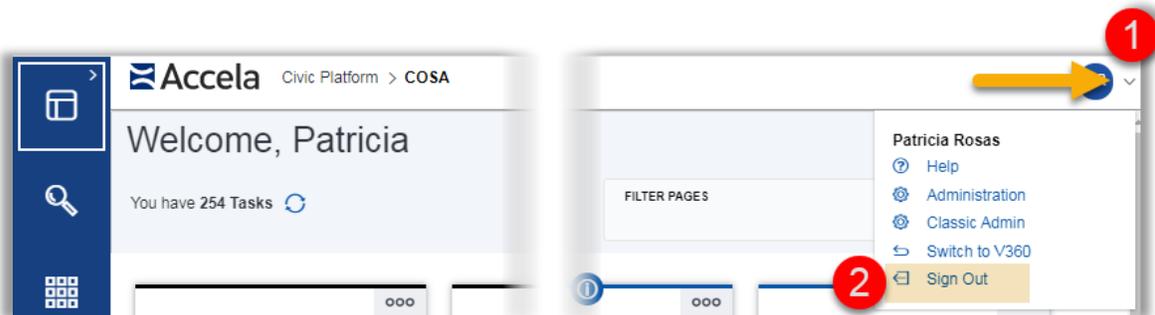
Login

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

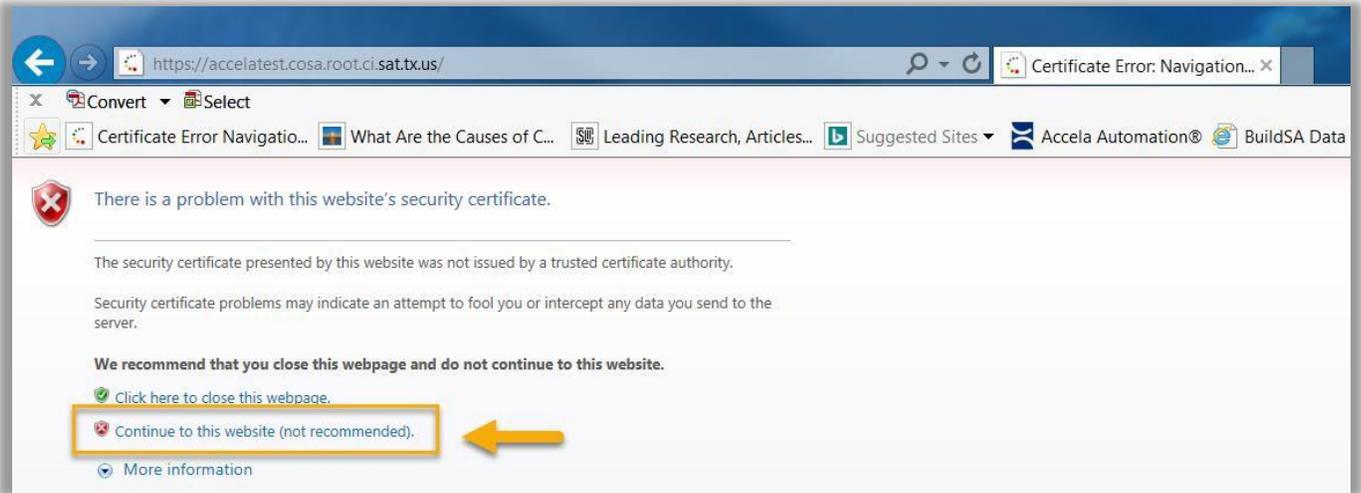
It is important to sign out properly when finished working in BuildSA. Signing out ensures that other users do not have access to your login credentials.

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



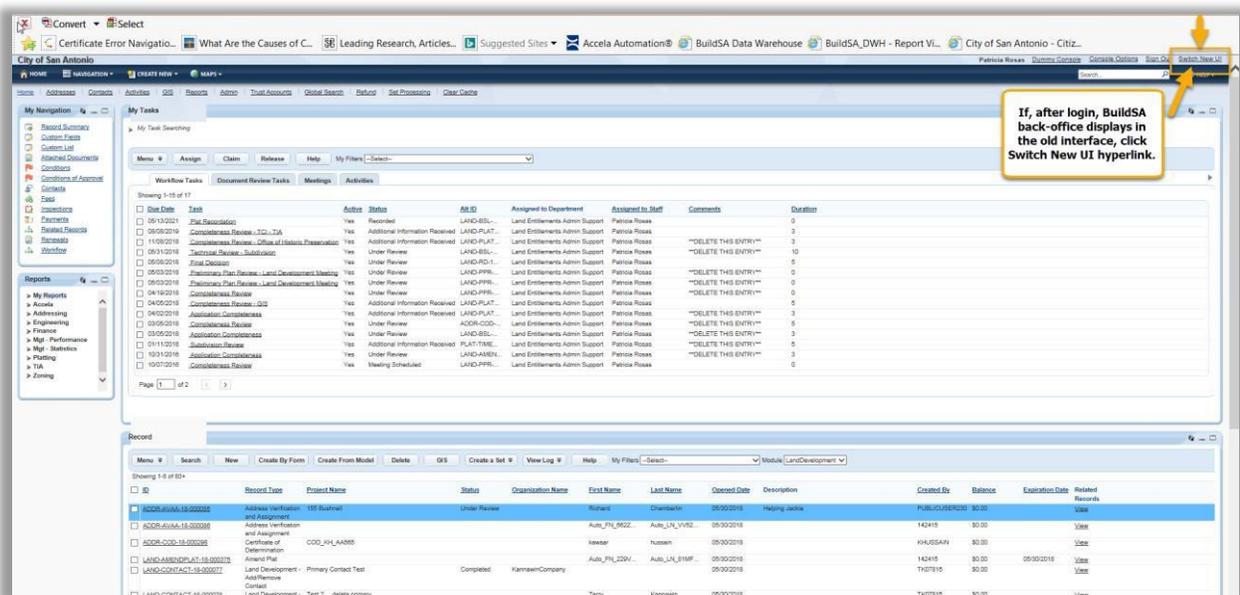
2. A drop-down menu displays. **Click** the *Sign Out* link (#2).

- ❖ **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

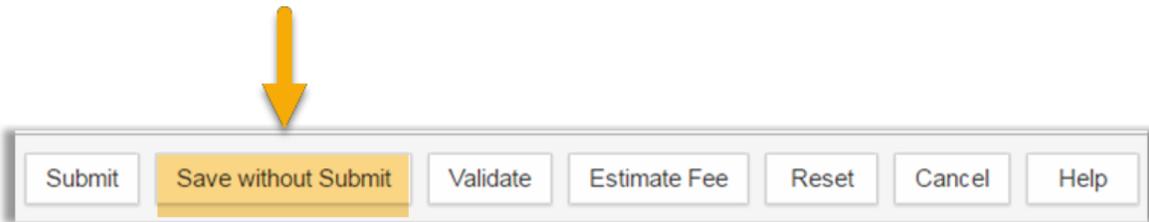
If, after login, BuildSA displays the old interface (shown), simply click on the Switch New UI hyperlink located in the upper right-hand corner of your screen to view the new version (shown).



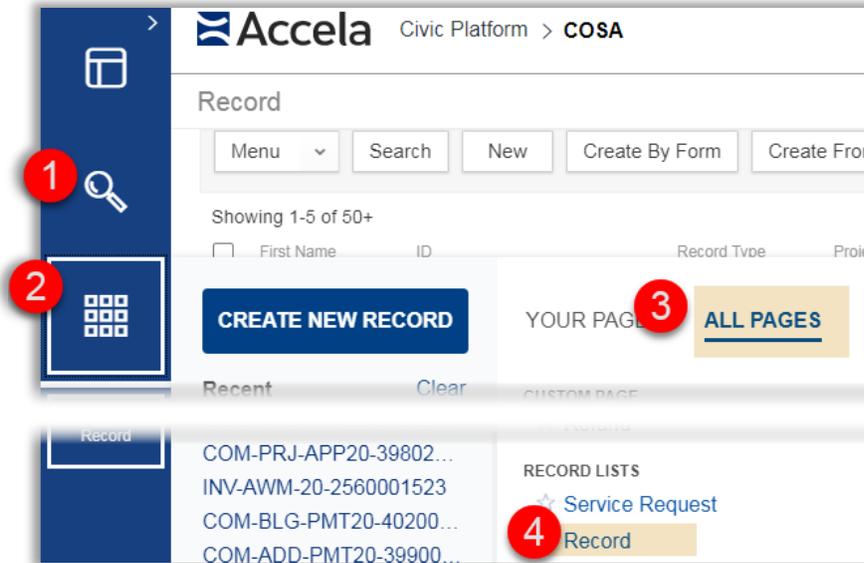
Timeout Mechanism

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**.



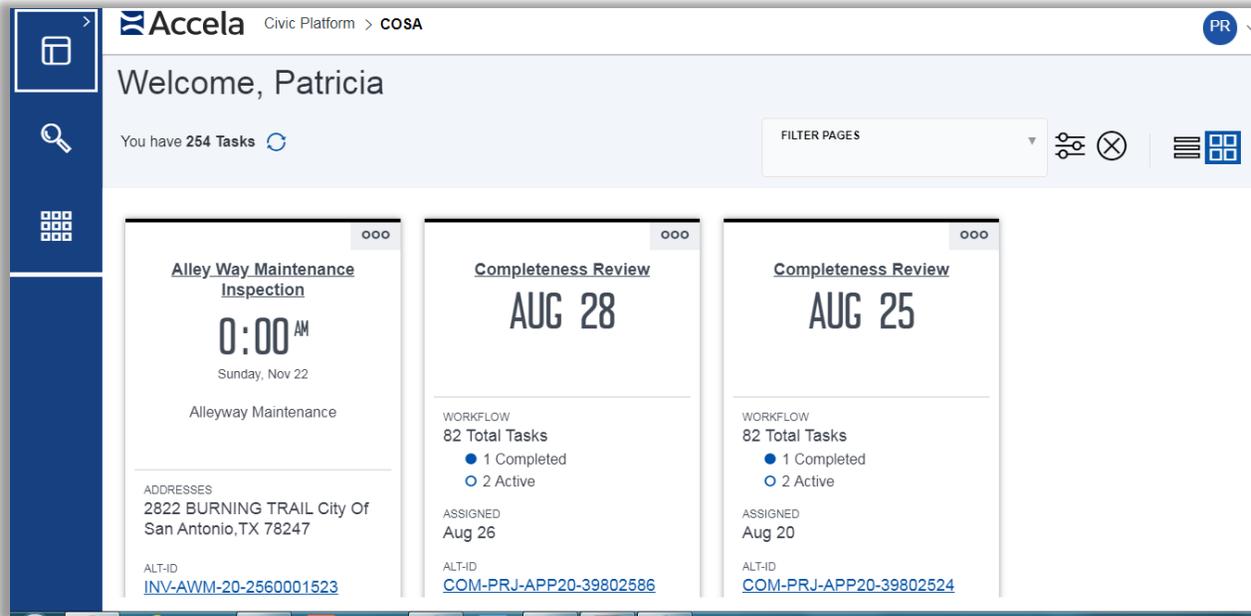
BuildSA generates a *temporary* record ID to the application (for example: 16TMP-001186). This temporary number allows the end-user to retrieve the application using Global Search (#1) or the *Record Search* page (steps #2, 3, 4). The Record Search page is located in All Pages (#3).



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.**

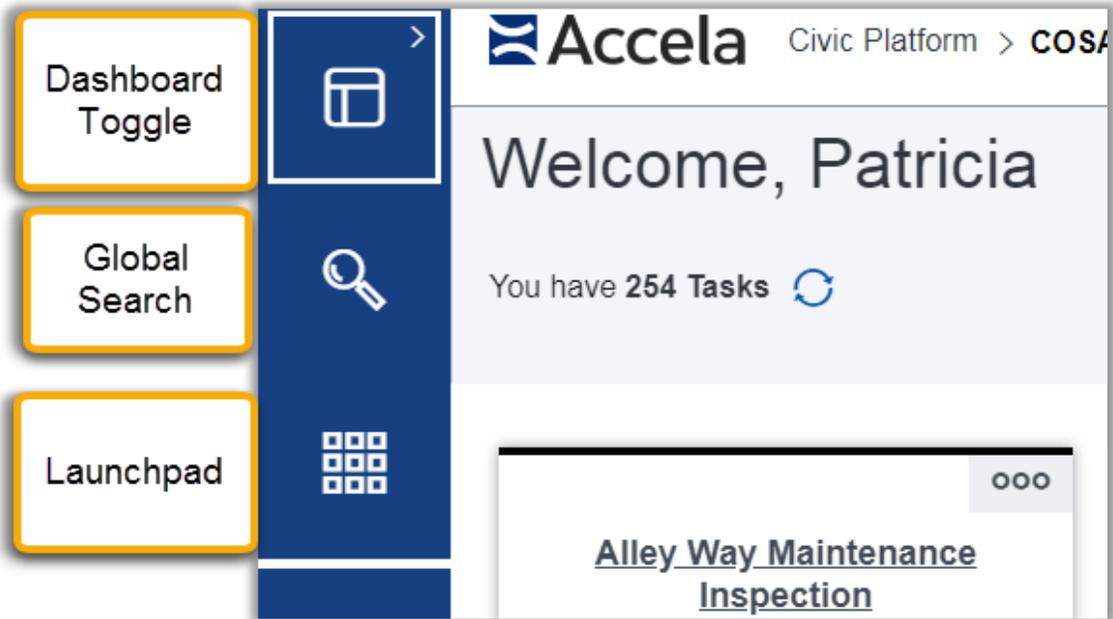


BuildSA provides a common interface, or back-office, for users. BuildSA offers customization options for viewing work tasks and on some of its individual Record pages. For this reason, you may notice that BuildSA displays differently for you than it does for others.

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 Main Menu is the blue column shown here to our left. It remains constant regardless of your location in BuildSA. Opened and pinned spaces displays here. Up to 20 spaces display.

ACCELA Civic Platform > COS

INV-AWM-20-2560001523

COM-PRJ-APP20-398...

ADDRESSSES

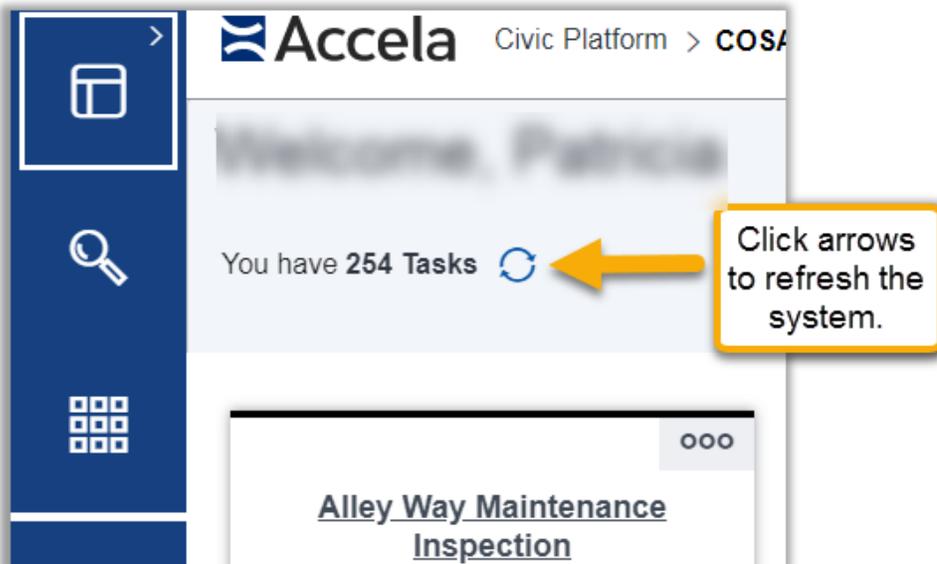
2822 BURNING TRAIL City Of San Antonio, TX 78247

ALT-ID

[INV-AWM-20-2560001523](#)

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

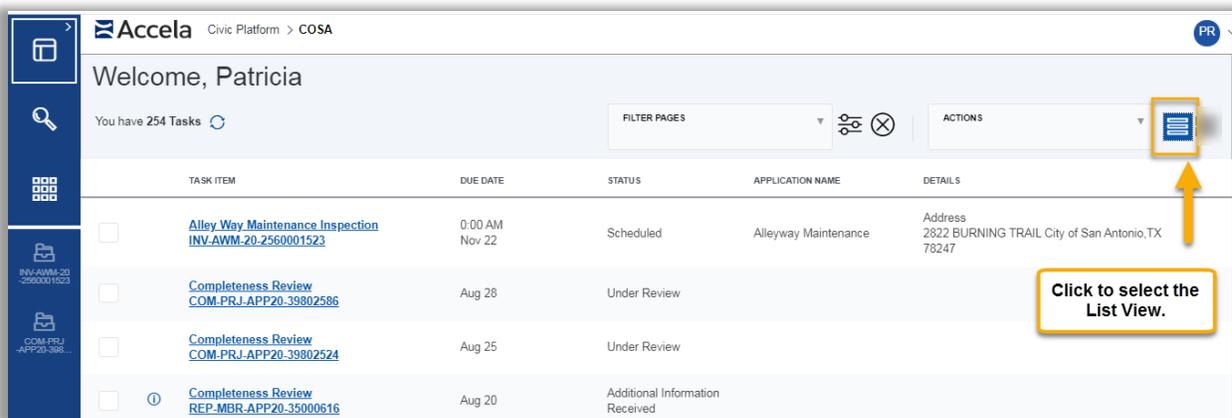
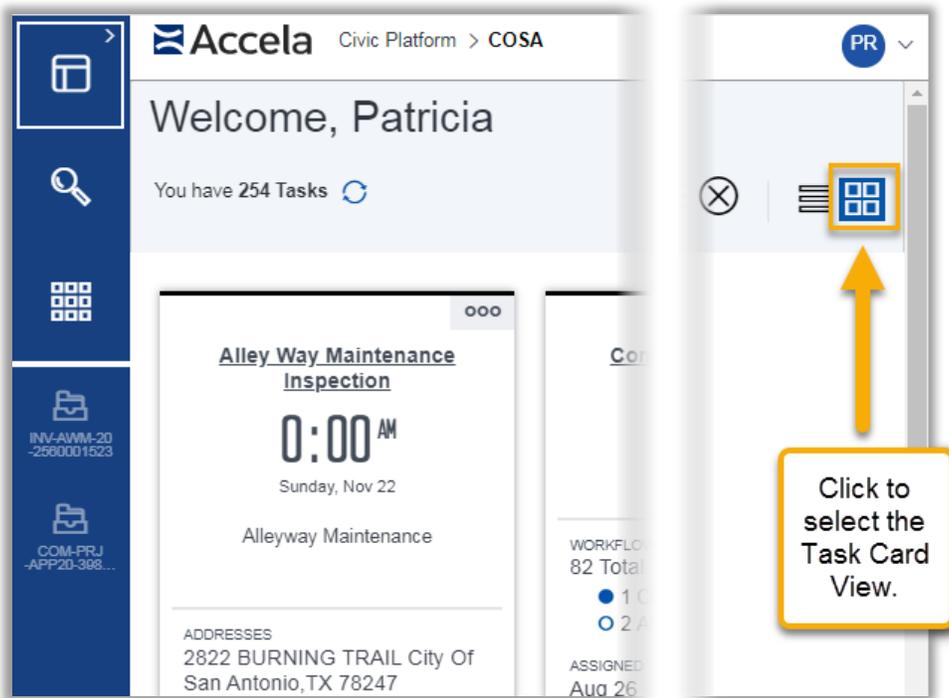
- The **tasks dashboard** is your day's to-do list. The workflow tasks listed on your desktop are **your** responsibility, if a task displays on your dashboard it is assigned to **you**. Please see your supervisor with questions.
- The **Launchpad** helps you get to where you need to be. It is the go-to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

Dashboard Display

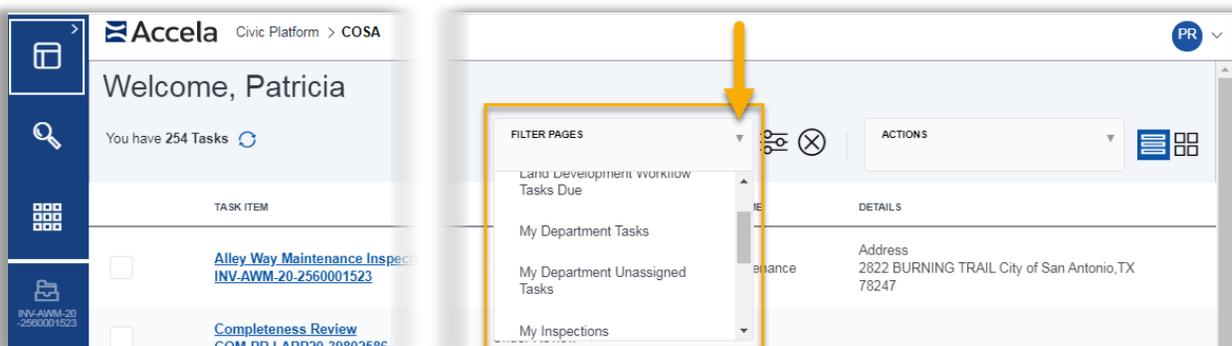
The tasks dashboard gives you two different display options for looking at your day's work assignments:

- Card View
- List View

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

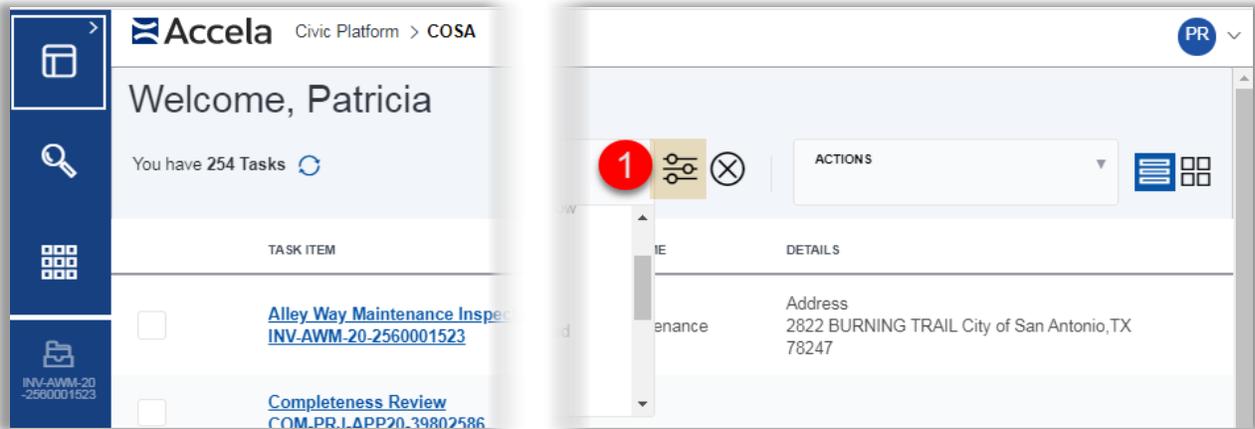


The *Filter Pages* drop-down menu gives you filtering options. Click the drop-down menu arrow to display options (shown).

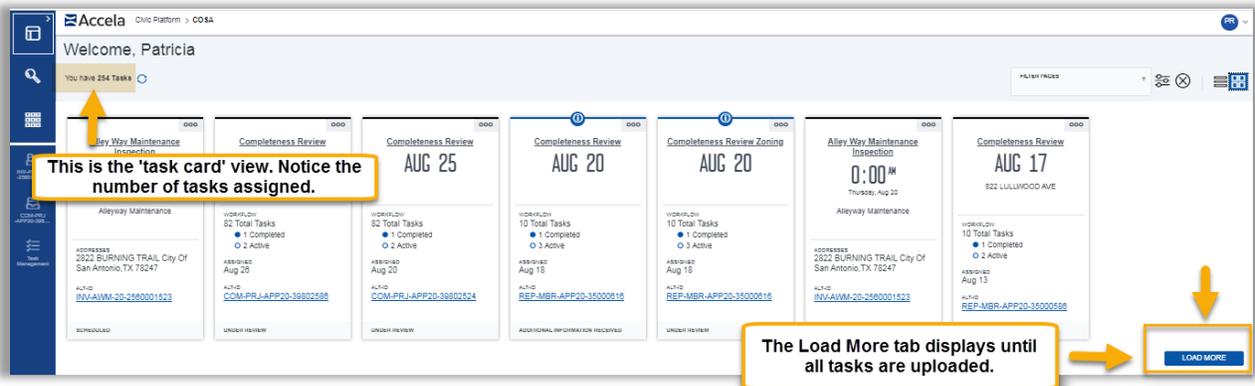


End-users may create their own personal filters to view tasks by clicking the [My Filters](#) link below (#1). Click

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:



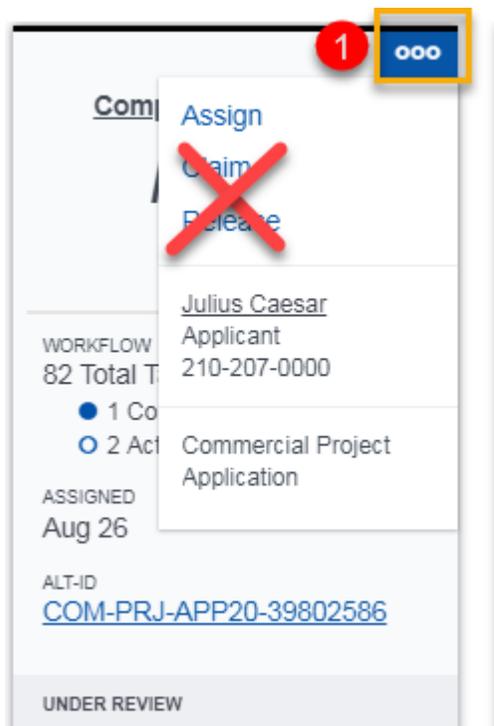
Important: Each task card is a separate task assigned to you.

- 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).

Completensess Review

JUL 1

WORKFLOW
22 Total Tasks

- 1 Completed
- 1 Active

UNDER REVIEW

Blue round icon with an 'i' in the center indicates a Notice condition placed on this record.

Completensess Review

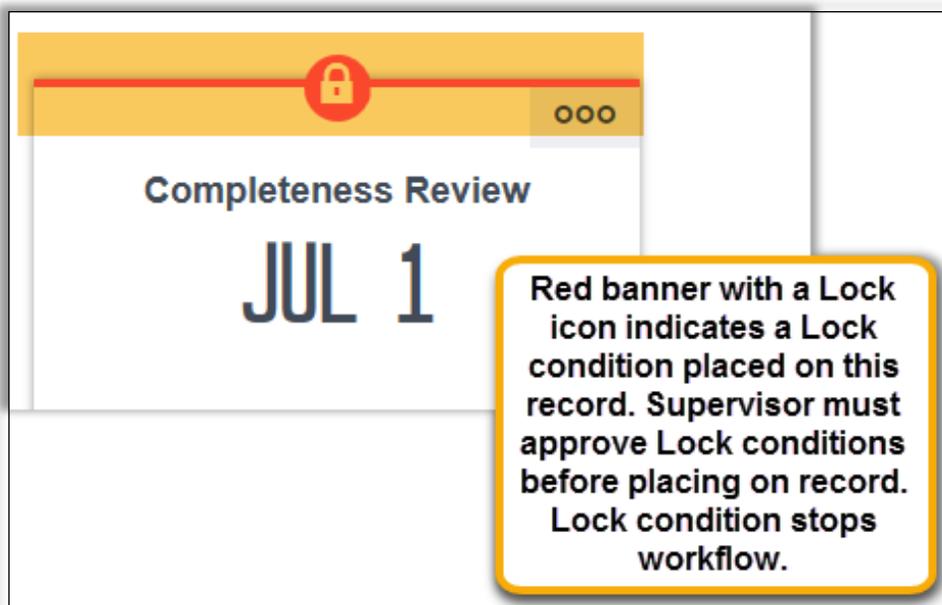
JUL 1

Orange banner with a hand icon indicates a Hold condition placed on this record.

Completensess Review

JUL 1

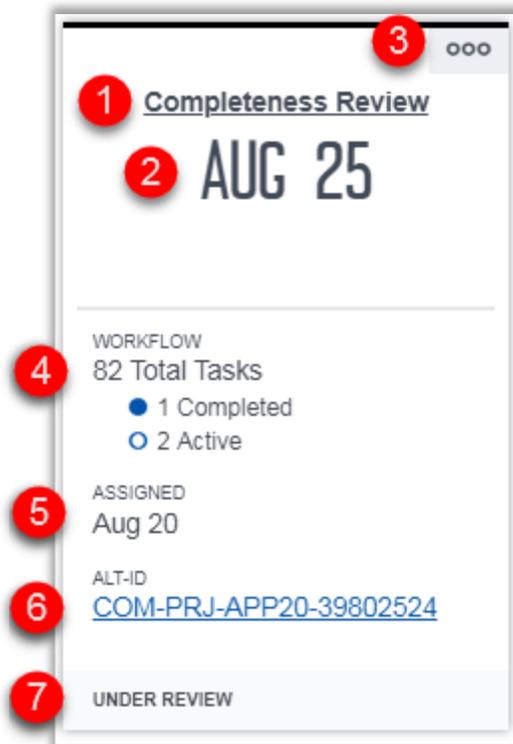
Orange banner with an exclamation point indicates a Required condition placed on this record.



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

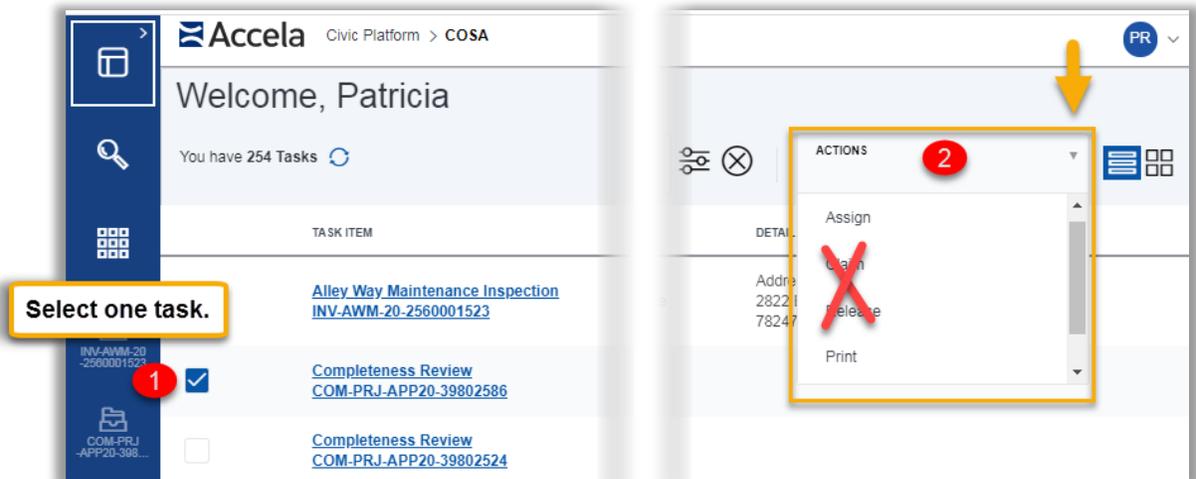
- Task items are listed in a table format. Six (6) tasks display by default when the page first loads. Use the **Load More** link, located at the bottom of the page, to view more of your tasks. Tasks load in increments of six (6).
- **Select** one or more task items and perform actions on them.
- The **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.

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).

TASK ITEM	
<input type="checkbox"/>	Completeness Review AMD-WR-19-13200559
<input type="checkbox"/> ⓘ	Completeness Review ZONING-Z-2019-10700051

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.

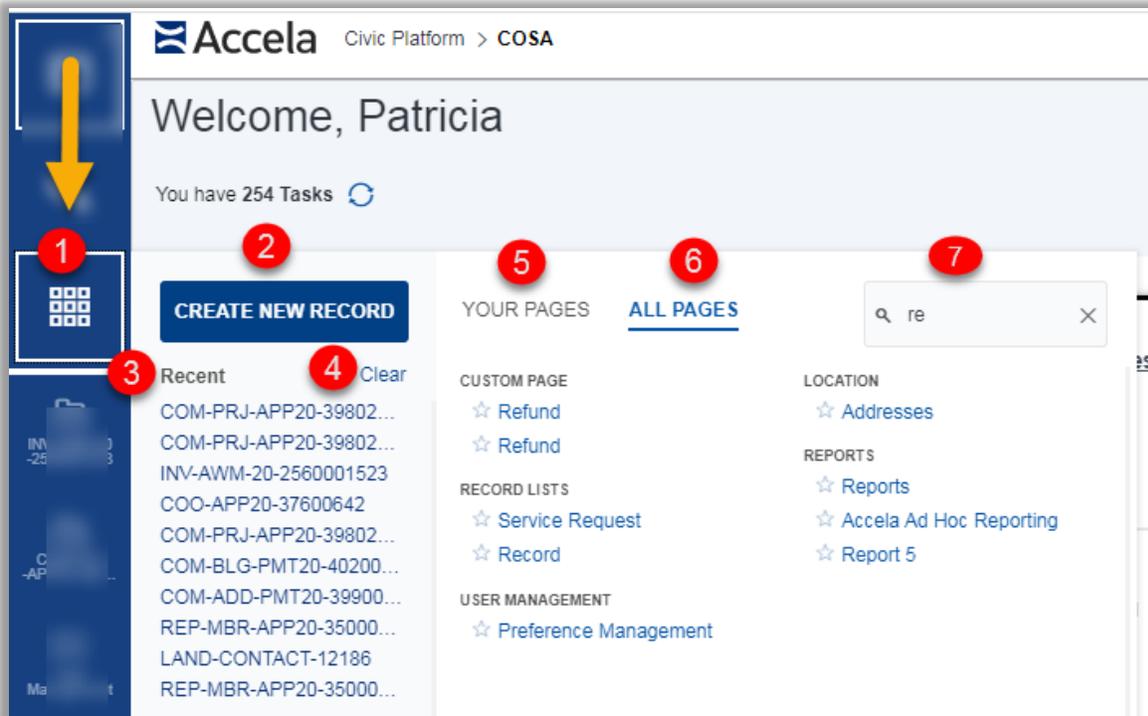
Supervisor approval is required before applying a Lock condition to a record.

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 repopulates 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).



The screenshot shows the Accela Civic Platform interface. At the top, the Accela logo and 'Civic Platform > COSA' are visible. A blue banner at the top left contains the text 'Application Message' and 'You have reached the limit of 20 open spaces.' Below this, a grey banner says 'You have 254 Tasks' with a refresh icon. The main area displays a grid of task cards. The first card is 'Alley Way Maintenance Inspection' with a due date of '0:00 AM' on 'Sunday, Nov 22'. The second card is 'Completeness Review' with a due date of 'AUG 28' and a workflow status of '82 Total Tasks' (1 Completed, 2 Active). The third card is 'Completeness Review Zoning' with a due date of 'AUG 28' and a workflow status of '82 Total Tasks' (1 Completed, 2 Active). A modal window is open over the first two cards, displaying '20 open spaces' and a list of addresses, including '2822 BURNING TRAIL City Of San Antonio, TX 78247'. The modal also shows 'ASSIGNED Aug 26' and 'ASSIGNED Aug 20'. The bottom of the modal shows 'UNDER REVIEW' and 'UNDER REVIEW' sections with various task cards. A red circle with the number '2' is placed over the '20 open spaces' text in the modal.

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

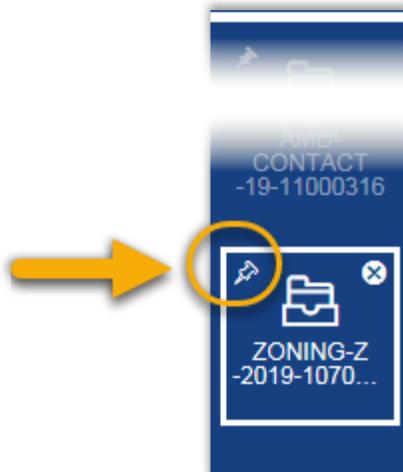


Features of the Main Menu

- 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).

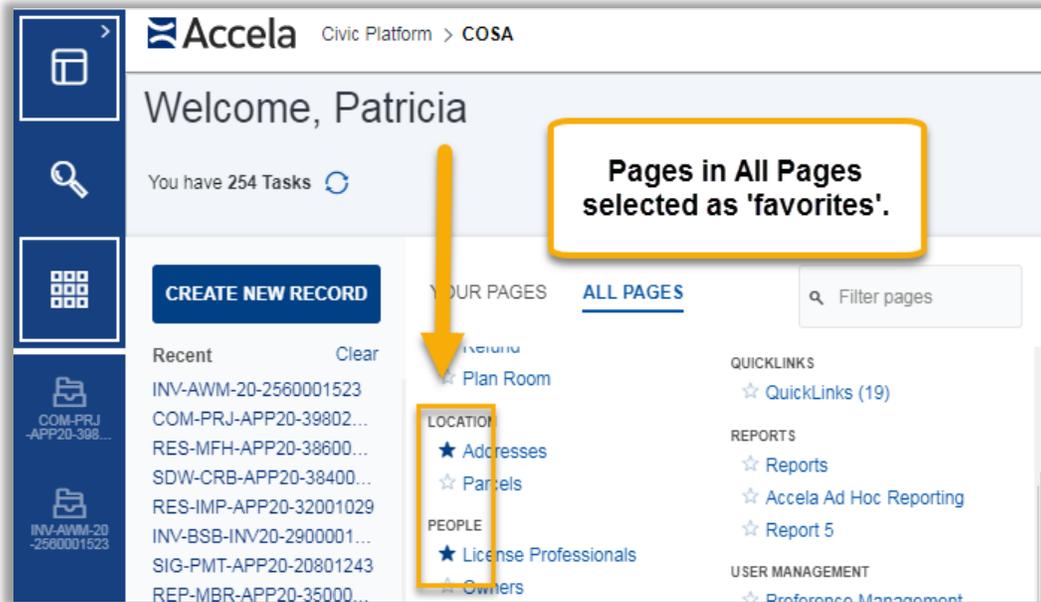
The screenshot shows the Accela Civic Platform interface for user Patricia. The navigation sidebar on the left contains a Launchpad icon (1), a search icon, and a magnifying glass icon (2). The main content area displays 'Welcome, Patricia' and 'You have 254 Tasks'. Below this is a 'CREATE NEW RECORD' button and a 'Filter pages' search box. The 'ALL PAGES' tab (3) is active, showing a list of pages categorized by functionality, each with a star icon for favoriting.

Category	Page Name	Star Icon
CALENDARING & INSPECTIONS	Inspections	★
	Calendar	★
CUSTOM PAGE	Clear Cache (External Partne...	★
	Refund	★
	Clear Cache	★
	Clear Cache	★
	Clear Cache (External Partne...	★
COMMUNICATION	Alert	★
	Bulletin Board	★
FEE-PAYMENT PROCESSING	Payment Processing	★
	Invoices	★
	Trust Account	★
OTHER	Sets	★
QUICKLINKS	Quicklinks (40)	★

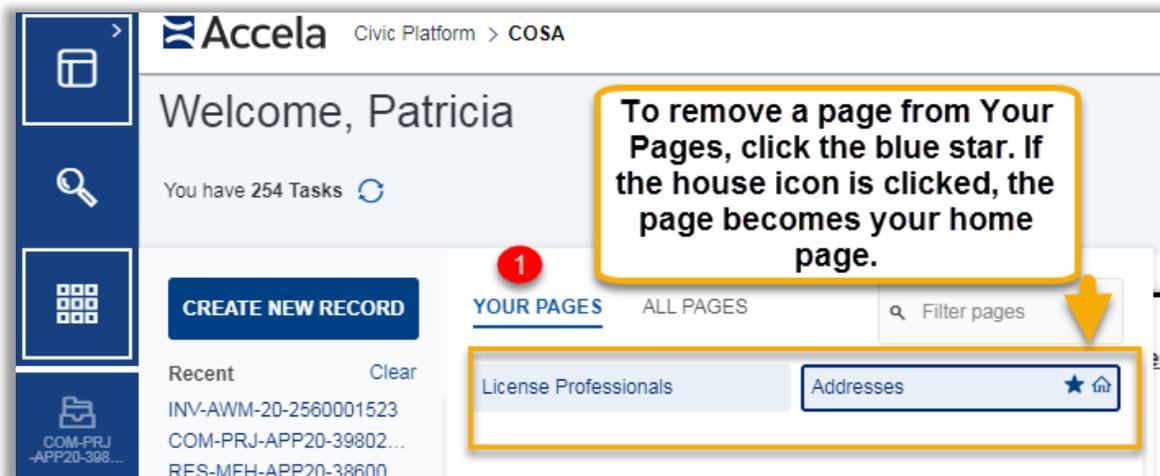
All Pages is a list of all the information available to you sorted by functionality. The list cannot be reorganized but you can filter the list to help you find data you need. Note the magnifying glass to the left of the field 'Filter pages'. Use this field to search for data.

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).

Accela Civic Platform > COSA

Welcome, Patricia

You have 254 Tasks

CREATE NEW RECORD

YOUR PAGES **ALL PAGES**

TASKS & ACTIVITIES

☆ My Tasks

Recent Clear

INV-AWM-20-2560001523

COM-PRJ-APP20-39802...

RES-MFH-APP20-38600...

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.

Accela Civic Platform > COSA

My Task Searching

My Tasks

Workflow Tasks

Menu Assign Claim Release Help My Filters

Showing 1-15 of 150+

Due Date	Task	Active	Status	My Filters	Assigned to Staff	Duration
08/28/2020	Completeness Review	Yes	Under Review	...	Patricia Rosas	3
08/25/2020	Completeness Review	Yes	Under Review	...	Patricia Rosas	3
08/20/2020	Completeness Review	Yes	Additional Information Received	REP-MBR-APP20-35000916	Customer Advocate Patricia Rosas	2
08/20/2020	Completeness Review Zoning	Yes	Under Review	REP-MBR-APP20-35000916	Customer Advocate Patricia Rosas	2
07/29/2020	Completeness Review	Yes	Under Review	RES-MFH-APP20-38600221	Customer Advocate Patricia Rosas	2
07/29/2020	Completeness Review Zoning	Yes	Under Review	RES-MFH-APP20-38600221	Customer Advocate Patricia Rosas	2

Page 1 of 10

Use arrows to move forward and back.

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

My Tasks

Workflow Tasks

Inspections

Document Review Tasks

Showing 1-15 of 150+

Due Date **Task** Active Status

04/07/2020 Technical Review - Sign Yes Under R

My Task Searching

My Tasks

Workflow Tasks

Inspections

Document Review Tasks

Meetings

Activities

Menu Manage Inspection Route Sheet View Log Help My Filters My Inspections

Showing 1-8 of 31

Inspection Type	Record ID	Required/Optional	Record Type	Record Type Alias	Address	Status	Inspector	Scheduled Date	Scheduled Start Time	AM/PM	Scheduled End Time	Scheduled End Time	Request Comment
<input type="checkbox"/>	Alley W...	INV-AWM-20-2660...	Optional	Code/Inve...	Overgrown Yard Investigation	2822 BURNING T...	Scheduled	Patricia Rosas	11/22/2020				
<input type="checkbox"/>	Zoning ...	INV-ZCD-20-3140...	Optional	Code/Inve...	Zoning UDC Investigation	13403 MAYPOLE ...	Scheduled	Patricia Rosas	07/24/2020				
<input type="checkbox"/>	DR Wa...	INV-DR-20-0000...	Optional	Code/Inve...	Dangerous	2840 BURNING T...	Scheduled	Patricia Rosas	07/24/2020				
<input type="checkbox"/>	Junk Ve...	INV-JNV-20-2810...	Optional	Code/Inve...	Vehicle Investigation	4018 MT LAUREL...	Scheduled	Patricia Rosas	05/22/2020				

Page 1 of 4

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).

My Task Searching

My Tasks

Workflow Tasks

Inspections

Document Review Tasks

Meetings

Activities

Menu **Assign** Claim Release Help My Filters --Select--

Showing 1-4 of 4

Due Date	Task	Active	Status	Alt ID	Assigned to Department	Assigned to Staff	Comments	Duration
01/11/2018	Subdivision Review	Yes	Under Review	PLAT-TIMEEXT-16-000038	Land Entitlements Admin Support	Patricia Rosas		5
01/01/2018	Technical Review	Yes	Under Review	ADDR-COD-17-000022	Land Entitlements Admin Support	Patricia Rosas		20
10/07/2016	Completeness Review	Yes	Meeting Scheduled	LAND-PPR-16-000014	Land Entitlements Admin Support	Patricia Rosas		0
<input checked="" type="checkbox"/>	06/29/2016	Completeness Review	Yes	Under Review	BOA-16-000004	Land Entitlements Admin Support	Patricia Rosas	1

Page 1 of 1

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.**

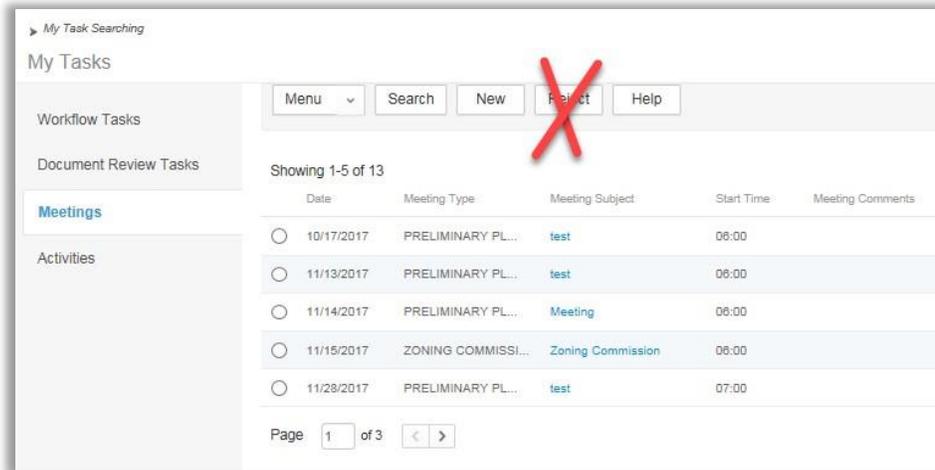
5. Click Submit (shown).
6. BuildSA generates a *1 task(s) assigned successfully message* (shown). Note that the task does not display on your task list any longer. The task now displays on the home page of the user to whom it is now assigned.

Due Date	Task	Active	Status	Alt ID	Assigned to Department
07/29/2019	Technical Review - Subdivision	Yes	Under Review	LAND-AMENDPLAT-19-10200022	Addressing Planner
07/29/2019	Technical Review - Parks and Recreation	Yes	Under Review	LAND-PLAT-19-11800135	Parks and Recreation
07/29/2019	Technical Review - Parks and Recreation	Yes	Under Review	LAND-PLAT-19-11800134	Parks and Recreation

❖ **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.

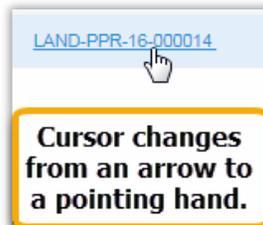


General Tips

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	<p>The magnifying glass on the Main Menu bar is your first go-to search tool for addresses, parcels, records, contacts, emails, LPs, etc.</p> 
Find a TEMP Record	Search for records saved using <i>Saved Without Submit (TEMP records)</i> by using the following path: <i>Launchpad/All Pages/Record/Search</i> .
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.

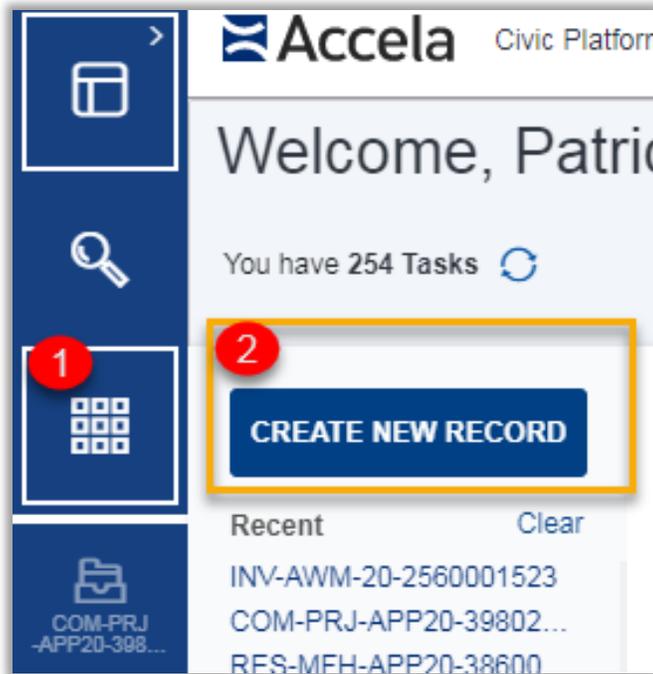
Creating New Records

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.**

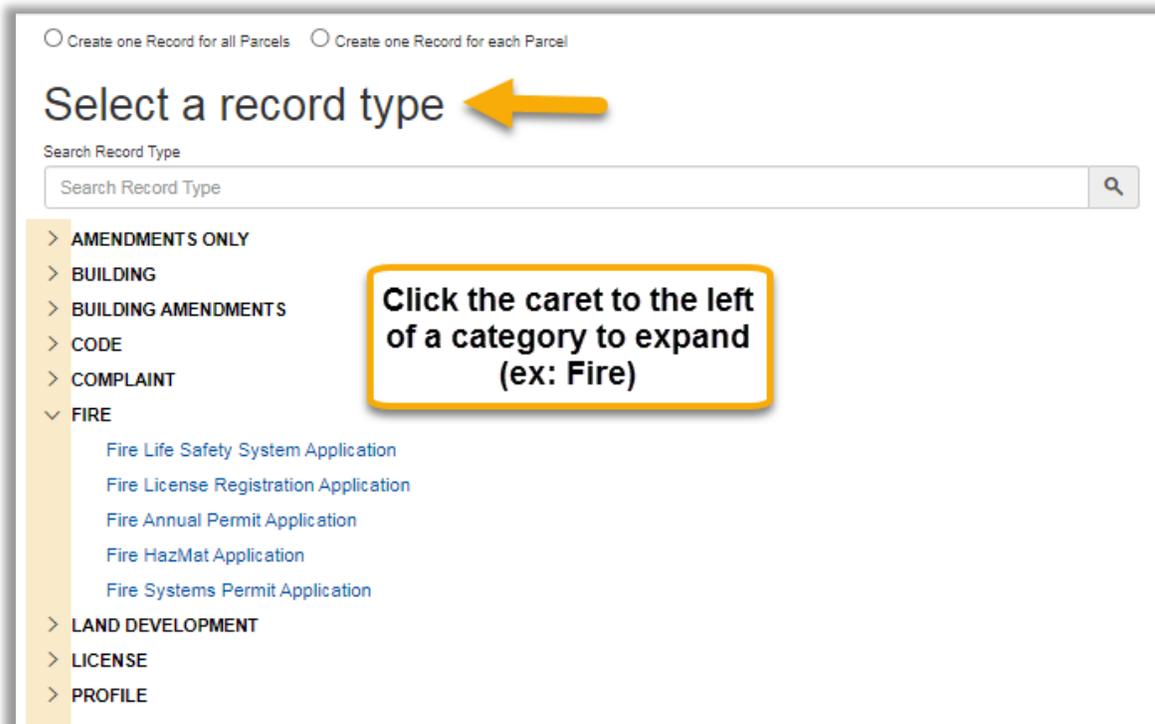


Every newly created record must have a designated Primary Contact.

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:

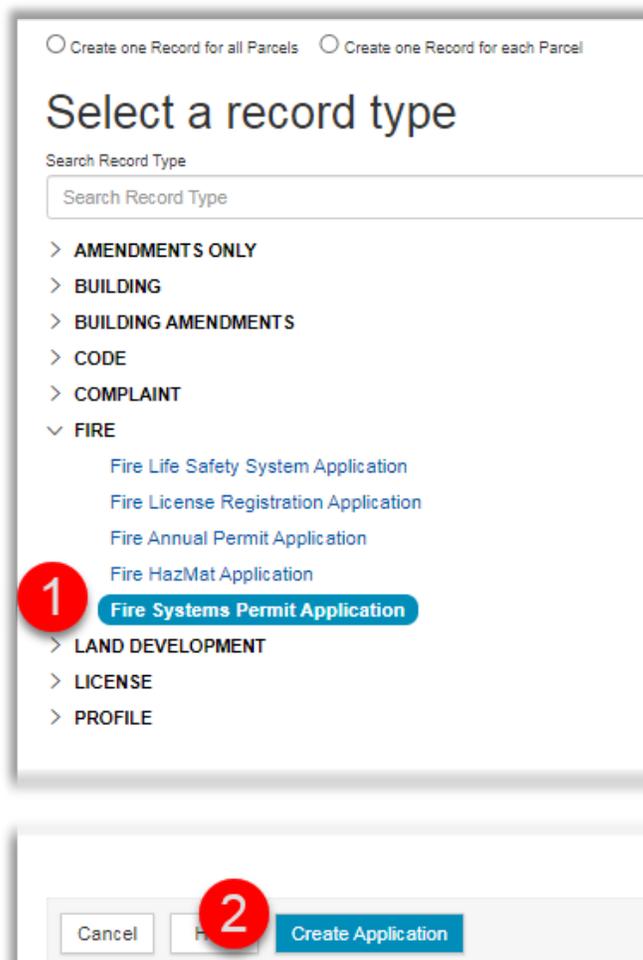
(shown).



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.

Submit Save without Submit Validate Estimate Fee Reset Cancel Help

Record Detail *(This section is required.)*

PIN NUMBER:

Record ID Opened Date

Record Type

Application Name

Address *(This section is not required.)*

Search Clear Get Parcel Address Locator XY GIS Locator GIS

Primary Address Type Status Validated

Street # Pre Direction Street Name Street Type Post Direction

Unit/Suite Level Building

City State Zip Code

Description Plat #

check spelling

X Coordinate Y Coordinate Lat Long Status

The APPLICATION INTAKE FORM displayed here is not shown in its entirety. Sections of the APPLICATION INTAKE FORM are unique to each application type.

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

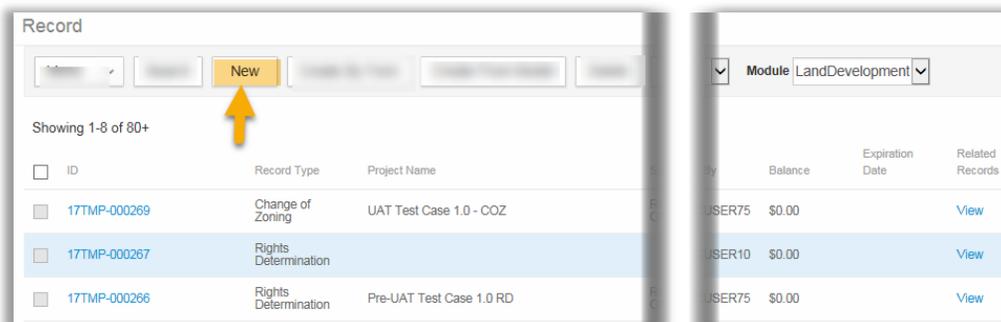
The top and the bottom of the APPLICATION INTAKE form displays a navigation bar with the following tabs. You may use the tabs from either top or bottom.



- **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.

Record

Menu Search New Create By Form Create From Model Delete GIS Create a Set View Log Help My Filters Plats1 Module LandDevelopment

Showing 1-5 of 50+

ID	Record Type	Project Name	Status	Organization Name	First Name	Last Name	Opened Date	Description	Created By	Balance	Expiration Date
ZONING-PA-2016-000107	Plan Amendment	Defect Testing...	Under Review	CARRERA LAURO &...	Rosa	Carrera	11/30/2016		PUBLICUSER322	\$0.00	
LAND-AMENDPLAT-16-000231	Amend Plat	Amend Plat Test AMEND...			Michael	Fierros	11/08/2016		MF21620	\$50.00	11/08/2016
LAND-AMENDPLAT-16-000232	Amend Plat	Amend Plat Test AMEND...	Under Review		Davey	Osbourne	11/08/2016		MF21620	\$722.00	11/08/2016
LAND-AMENDPLAT-16-000234	Amend Plat	Amend Plat Test AMEND...	Under Review		Tyler	Durdan	11/08/2016	Amend Plat Test AMEND-20 AMEND-21 ...	PUBLICUSER72	\$0.00	11/08/2016
LAND-CONTACT-16-000091	Land Development - Add/Remove Contact	gfdgafasdsa	Under Review		Tinker	Bell	11/08/2016		RFOGG01	\$10.00	

Page 1 of 10

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

LAND-AMENDPLAT-16-000235	Amend Plat	Amend Plat Test AMEND...	Under Review	Tyler	Durdan
LAND-AMENDPLAT-16-000236	Amend Plat	Amend Plat Test AMEND...	Under Review	Davey	Osbourm
LAND-AMENDPLAT-16-000237	Amend Plat	Amend Plat Test AMEND...	Under Review	Tyler	Durdan
LAND-CONTACT-16-000091	Land Development - Add/Remove Contact	gfdgafasdsa	Under Review	Tinker	Bell
16TEMP-000098	Traffic Impact Analysis				

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

Accela Civic Platform > COSA

Record

7 Submit Reset Cancel New Help Enable Soundex Search 3

Search by Record Attributes

Record Type Group Type Subtype Category Application Name

--Select-- --Select-- --Select-- --Select--

1 Record ID

4 Current Workflow Task

5 Search by Contact

First Name Contact Organization Name

6 Search by Address/Parcel

Street # Street Name Street Type

Unit/Suite Level Building Zip Code

2

Opened Date From To

09/14/1970 09/01/2020

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).

Accela Civic Platform > COSA

ADDR-AVAA-19-10100467

Record Summary Workflow Workflow History Documents

Menu New Delete Look Up Search and Select Address Locator XY GIS Locator Help

Primary	Street Number	Street Name	Street Type	Unit/Suite	City	State	Zip	Status	Type
<input type="checkbox"/>	216	TERRY COURT			City...	TX	78212		

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

Accela Civic Platform > COSA

ADDR-AVAA-19-10100467

Address Detail

Save Reset Synchronize Address Locator XY GIS Locator Cancel Help

District

Primary Address Type --Select-- Status --Select-- Validated

Street # 216 Pre Direction --Select-- Street Name TERRY COURT Street Type --Select-- Post Direction --Select--

Unit/Suite Level Building

City City of San Antonio State TX Zip Code 78212

Description Plat #

check spelling

X Coordinate 2132447.7 Y Coordinate 13711224

Lat 29.449189 Long 98.484838 Status --Select--

Validated --Select--

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.

Record ID: LAND-PUD-18-000014

Menu Delete Look Up Search and Select Help

City Parcel #	Primary	Legal Description	Condition	Block	Lot	NCB	BCAD Geo ID
113	Yes	NCB A18 BLK L...		0	12	18	

Parcel

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

Parcel Detail

Cancel Help

District

City Parcel # * 123456 County Property ID 364990 Primary Y

Legal Description CB 5979D BLK 1 LOT 4

Block 31 Lot 4 NCB 5979 Plat #

Parcel Area 0 BCAD Geo ID Homestead Exempt

BCAD Situs Address 230 YOSEMITE DR, HOLLYWOOD PARK, TX 78232

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.

Accela Civic Platform > COSA

ZONING-Z-2019-10700051

A notice was added to this record on 2019-07-29.
Condition: Capital Project Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu ▾ **New** Delete **Look Up** Search and Select Address Locator XY GIS Locator Help

<input type="checkbox"/>	Primary	Street Number	Street Name	Street Type	Unit/Suite	City	State	Zip	Status	Type
<input type="checkbox"/>	Yes	243	PATRICIA	DR		City...	TX	78216	Enabled	

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

Accela Civic Platform > COSA

ZONING-ZV-2019-13300150 - Mariposa Project

A notice was added to this record on 2019-08-11.
Condition: Expedited Case Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Submit Reset Address Locator XY GIS Locator Cancel Help

Primary Yes Address Type Status Validated

Street # Pre Direction Street Name Street Type Post Direction

Unit/Suite Level Building

City State Zip Code

Description Plat #

check spelling

X Coordinate Y Coordinate Lat Long Status

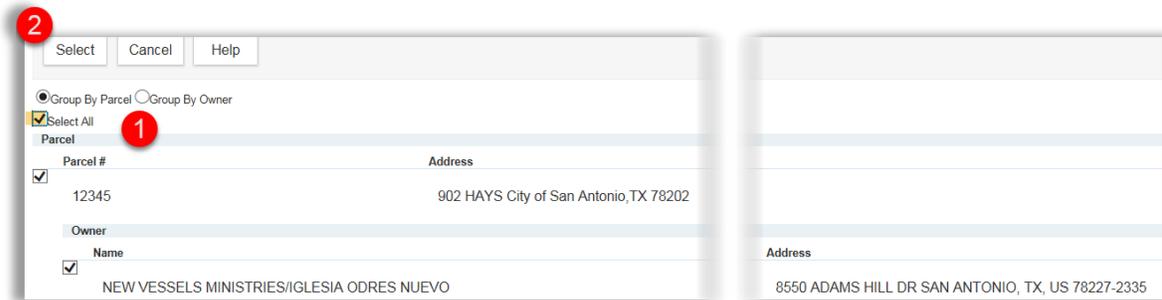
Validated

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

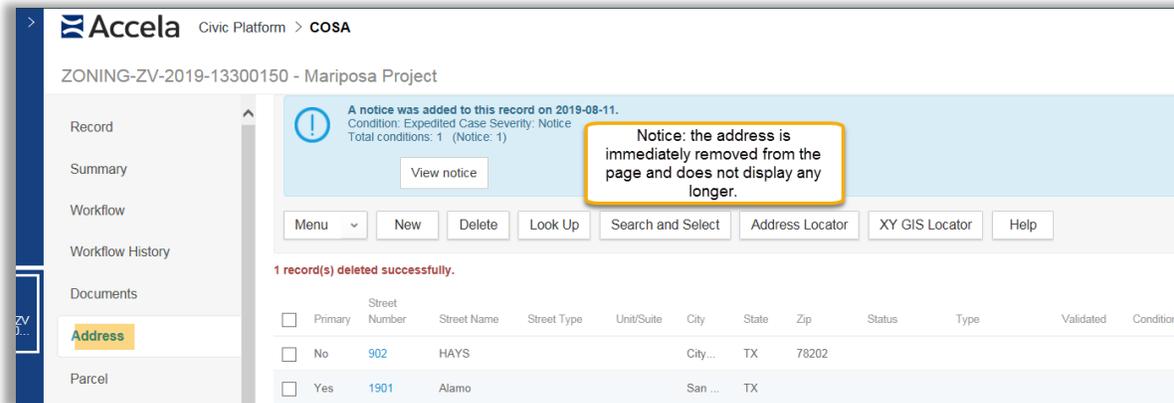
Removing an Address from a Record

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.**

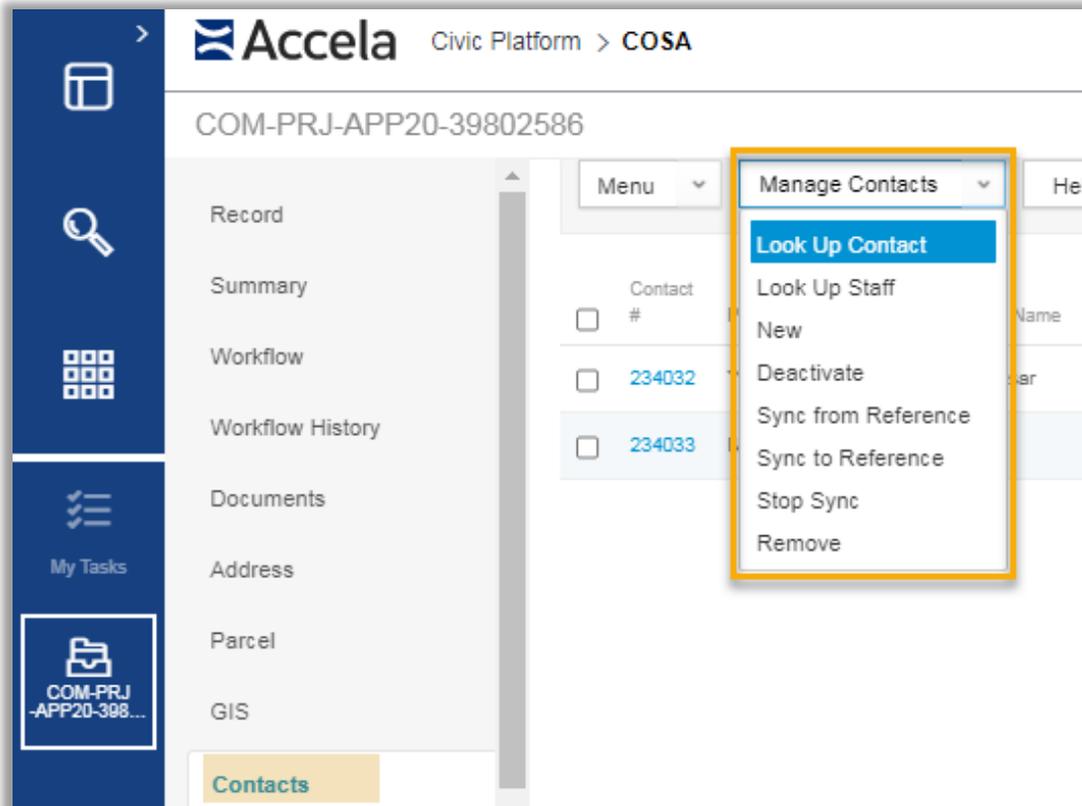
- **If the request is to add or remove authorized agents from an Escrow Account, DSD Staff creates this amendment in BuildSA back-office.**

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.**

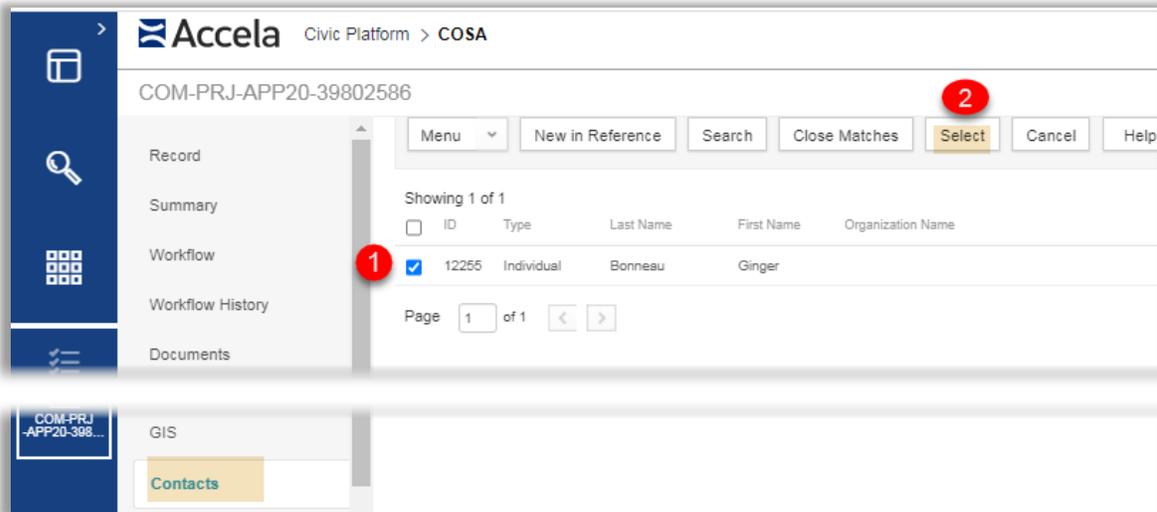
- ❖ **IMPORTANT: Always select Look Up Contact before adding a Contact. Doing so eliminates duplicates in the system.**



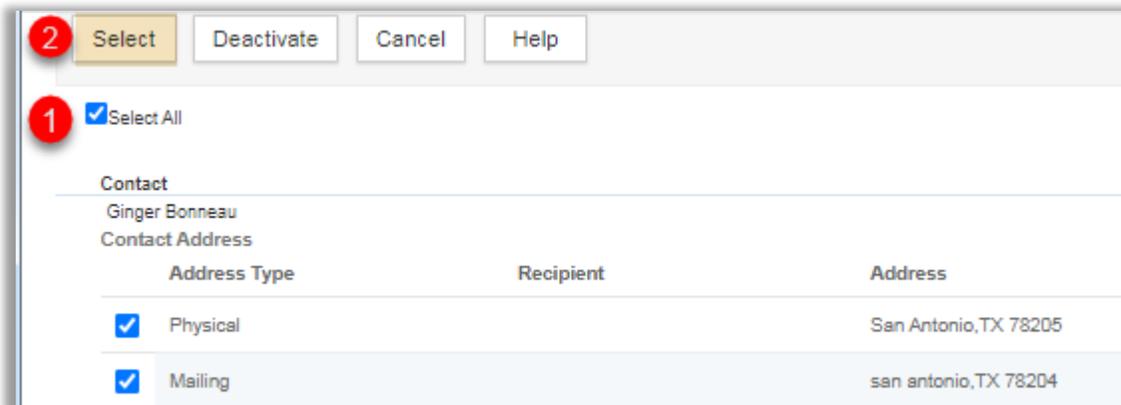
- The search form displays. Complete fields with information known (first/last name, organization name, email, etc.)
- Click Submit.

The screenshot shows the search form for contacts in the Accela Civic Platform. The form is titled 'COM-PRJ-APP20-39802586'. It includes a 'Submit' button and a 'Reset' button. The form fields are: First Name (Ginger), Middle Name, Last Name (Bonneau), Title, Business Name, Primary Phone, Mobile Phone, Alternate Phone, and Fax. Red circles with numbers 1, 2, and 3 are placed over the First Name field, the Last Name field, and the Submit button, respectively.

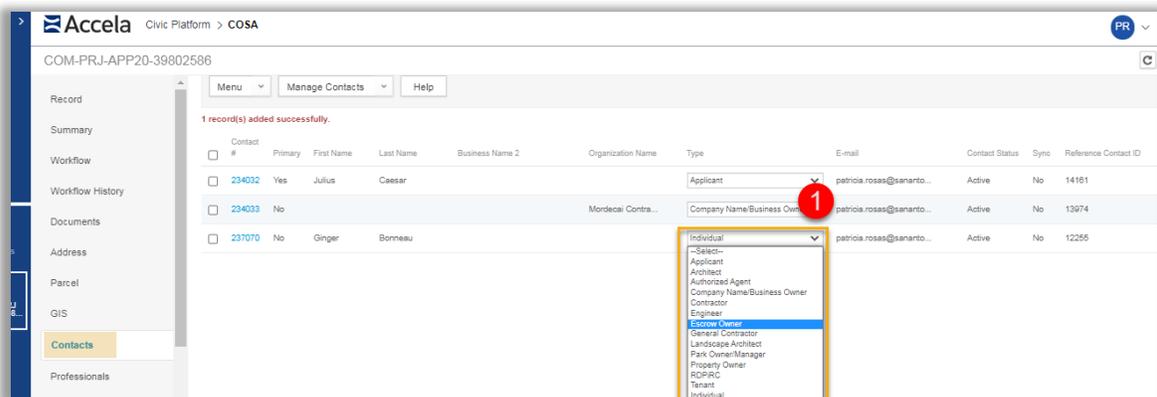
6. BuildSA returns all matches. **Click** the box to the left of your selection (#1).
7. **Click** Select (#2).



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).

Contact #	Primary	First Name	Last Name	Business
17776	Yes	Patricia	Cavazos	
17777	No	Caryn	Moore	
17779	No	Patricia	Cavazos	
17778	No	JOHN	ARAMENDIA	

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).

The screenshot shows the Accela Civic Platform interface for record ZONING-Z-2019-10700051. A warning message at the top states: "A notice was added to this record on 2019-07-29. Condition: Capital Project Severity: Notice. Total conditions: 1 (Notice: 1)". Below this is a "View notice" button and a "Manage Contacts" dropdown menu. The main content area displays a table of contacts with columns for Contact #, Primary, First Name, Last Name, Business Name 2, Organization Name, Type, E-mail, Contact Status, Sync, and Reference Contact ID. The "Contacts" tab in the left sidebar is highlighted. The "Type" dropdown menu is open, showing a list of contact types including "Escrow Owner".

Contact #	Primary	First Name	Last Name	Business Name 2	Organization Name	Type	E-mail	Contact Status	Sync	Reference Contact ID
17776	Yes	Patricia	Cavazos			Applicant	Patricia...	Active	No	7779
17777	No	Caryn	Moore			Authorized Agent	caryn.moo...	Active	No	8973
17779	No	Patricia	Cavazos			Escrow Owner	Patricia...	Active	No	7779
17778	No	JOHN	ARAMENDIA			Escrow Owner		Active	No	4

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

The screenshot shows the Accela Civic Platform interface for record ZONING-Z-2019-10700051. A message at the top states: "A notice was added to this record on 2019-07-29. Condition: Capital Project Severity: Notice. Total conditions: 1 (Notice: 1)". Below this is a "View notice" button and a "Manage Contacts" dropdown menu. A red box highlights a message: "1 Record(s) updated successfully." The main content area displays a table of contacts with columns for Contact #, Primary, First Name, Last Name, Business Name 2, Organization Name, Type, E-mail, Contact Status, Sync, and Reference Contact ID. The "Contacts" tab in the left sidebar is highlighted.

Contact #	Primary	First Name	Last Name	Business Name 2	Organization Name	Type	E-mail	Contact Status	Sync	Reference Contact ID
17776	Yes	Patricia	Cavazos			Applicant	Patricia...	Active	No	7779
17778	No	JOHN	ARAMENDIA			Escrow Owner		Active	No	4
17777	No	Caryn	Moore			Authorized Agent	caryn.moo...	Active	No	8973
17779	No	Patricia	Cavazos			Escrow Owner	Patricia...	Active	No	7779

New Contacts

Always search for a Contact before 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.

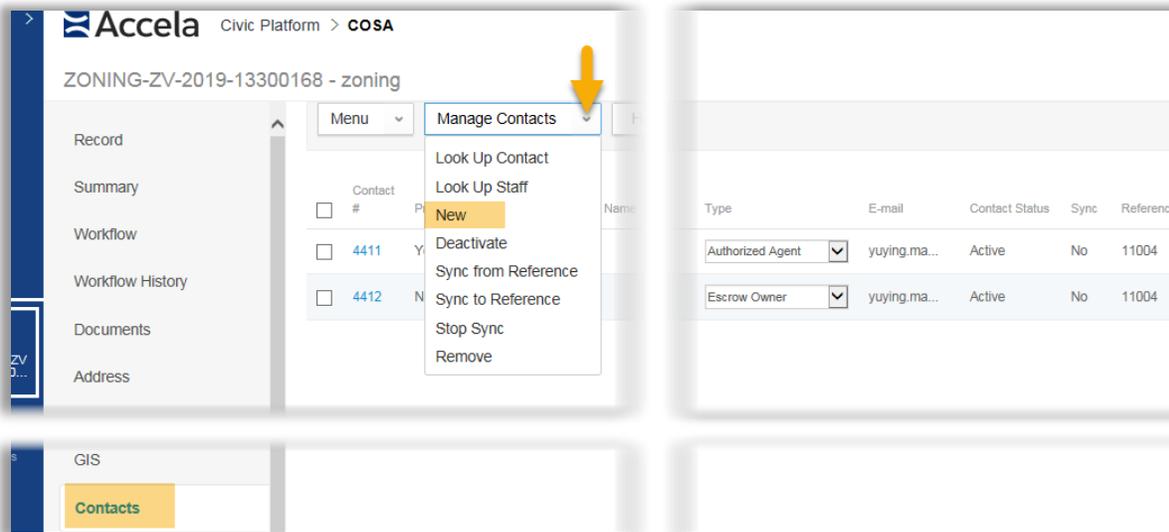
❖ **IMPORTANT: Never use the option to Merge a Contact! If you have any questions, please contact the Organizational Change Management Team.**

[\(buildsaocmteam@sanantonio.gov\)](mailto: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.

Accela Civic Platform > COSA

COM-PRJ-APP20-39802586

Submit Reset Cancel Help

Record Type Individual Organization

Type * --Select-- Primary Yes

Applicant Name Last Name * Suffix Title

Authorized Agent Draco

Business Owner

Company Name/Business Owner

Contractor secondary Phone 24 Hr Emergency Phone

Designated Operator

Engineer

Escrow Owner

Facility Manager Business Name

Landscape Architect

Licensed Professional

Non-Profit

Park Owner/Manager

Property Owner

RDPIRC

Recipient

Surveyor

Tenant FEIN

Contact Address

New Remove Deactivate

COM-PRJ-APP20-39802586

Complete all required fields. Scroll to the Contact Address section. Mailing and Physical addresses are required, even if the same.

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

Submit Reset Cancel Help

Address Type * Mailing

Type information for both Mailing and Physical.

Address Line 1 * 1901 S Alamo

Address Line 2

Address Line 3

City * San Antonio State * TX Country/Region * United States Zip Code * [xxxxx] 78204

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.

The screenshot shows the 'Contact Address' interface for 'ZONING-ZV-2019-13300168'. It features buttons for 'New', 'Remove', and 'Deactivate'. A message states '1 contact address(es) added successfully.' Below this is a table with columns: Contact, Address ID, Address Type, Address Line 1, City, State, ZIP Code, Status, and Primary. One row is visible with 'Mailing' as the address type and '1901 S Alamo' as the address line 1. The status is 'Active' and the primary contact is indicated by a radio button.

Contact	Address ID	Address Type	Address Line 1	City	State	ZIP Code	Status	Primary
<input type="checkbox"/>		Mailing	1901 S Alamo	San Antonio	TX	78204	Active	<input type="radio"/>

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

The screenshot shows the 'Contact Address' interface for 'ZONING-ZV-2019-13300168'. It features buttons for 'New', 'Remove', and 'Deactivate'. A message states '1 contact address(es) added successfully.' Below this is a table with columns: Contact, Address ID, Address Type, Address Line 1, City, State, ZIP Code, Status, and Primary. Two rows are visible: one with 'Mailing' and one with 'Physical' as the address type, both with '1901 S Alamo' as the address line 1. The status is 'Active' and the primary contact is indicated by radio buttons.

Contact	Address ID	Address Type	Address Line 1	City	State	ZIP Code	Status	Primary
<input type="checkbox"/>		Mailing	1901 S Alamo	San Antonio	TX	78204	Active	<input type="radio"/>
<input type="checkbox"/>		Physical	1901 S Alamo	San Antonio	TX	78204	Active	<input type="radio"/>

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).

Accela Civic Platform > COSA

Contacts **3**

Submit Reset Cancel Help Enable Soundex Search

Contact Type **2**
Individual

Reference Contact ID Type --Select--

First Name **1** Patricia Middle Name Last Name Rosas Suffix Title

Organization Name Business Name FEIN

E-mail

Primary Phone Secondary Phone

Birth Date:
From To

Evening Phone

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).

Accela Civic Platform > COSA

COM-PRJ-APP20-39802586

Record Summary Contact

Menu Manage Contacts Help

1 CREATE NEW RECORD

YOUR PAGES **2** ALL PAGES

contact

Recent Clear

INV-AWM-20-2560001523

PEOPLE **3** Contacts

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

ID	Type	Last Name	First Name	Organization Name	Primary Phone	E-mail	Status
45110	individual	AKERELE	MATTHEW		(210) 995-7755	MIAKERELE@TRUEVINEL...	Active
47131	individual	BERRY	MATTHEW		(210) 317-2085	BERRY0561@SBCGLOBAL...	Active
40459	individual	CAIN	MATTHEW		(972) 284-9916	MATT.CAIN@CAINCES.COM	Active
46904	individual	POMPA	MATTHEW		(210) 771-6620		Active
43185	individual	STEVENS	MATTHEW		(210) 232-7032	MATTHEW.STEVENS@USA...	Active

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).

Accela Civic Platform > COSA

Contacts

Contact Detail

Submit Reset Help

Contact Type **1** Individual Organization

Type *
Individual

First Name * **2** Ulura Middle Name Last Name * **3** sakari Suffix Title Business Name

Birth Date

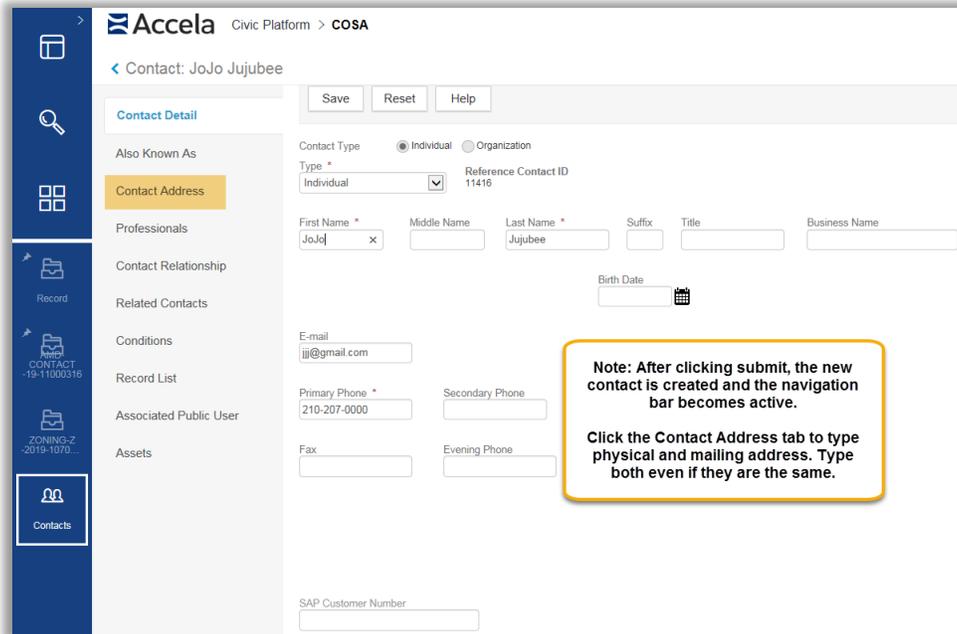
E-mail **4** patricia.rosas@sanant

Primary Phone * **5** 210-207-0000 Secondary Phone

Fax Evening Phone

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).

Accela Civic Platform > COSA

Contacts

Menu Search Close Matches Reset New Merge Help

Showing 1-6 of 6

ID	Type	Last Name	First Name	Organization Name	Primary Phone	E-mail	Status	Contact Type
2743	Individual	ROSAS	ANDY		(210) 695-1206		Active	individual
2744	Individual	ROSAS	GENE		(210) 472-3900	JAMIE@ADACG.COM	Active	individual
7775	Individual	Rosas	Patricia		(210) 207-0233	patricia.rosas@sana...	Active	individual
11143	Individual	Rosas	Patricia		(210) 207-0547	patricia.rosas@sana...	Active	individual
2742	Individual	ROSAS	ROGELIO		(210) 435-8997		Active	individual
4009	Individual	ROSAS	RUDY		(210) 727-8128		Active	individual

Page 1 of 1

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.**

The screenshot displays the Accela Civic Platform interface for a contact named Patricia Rosas. The page title is 'Contact: Patricia Rosas'. The sidebar on the left contains navigation icons for 'Record', 'CONTACT -19-11000316', and 'Contacts'. The main content area shows a form with the following fields and actions:

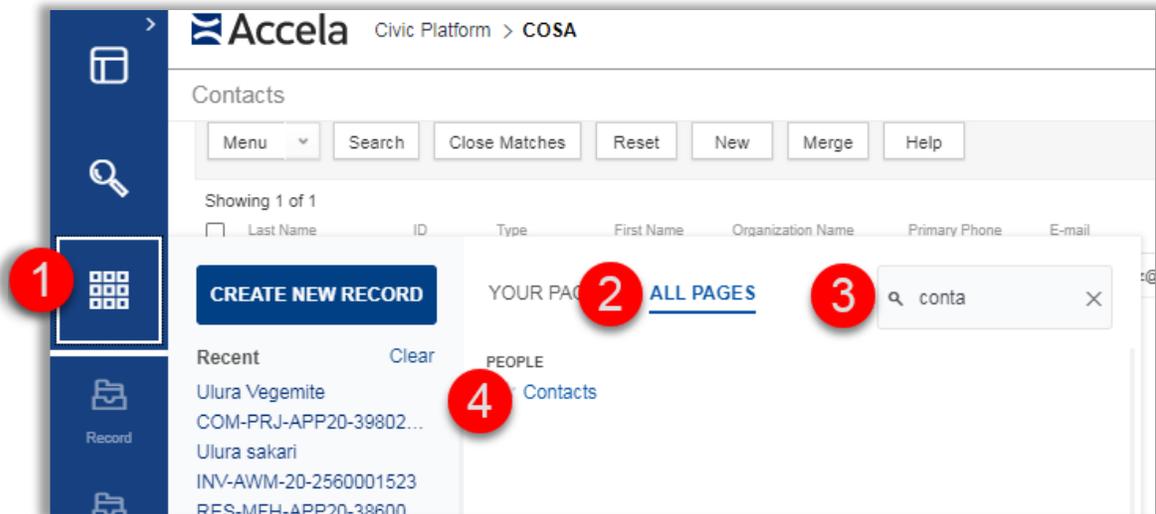
- Actions:** Menu, Save (6), Add (2), Delete, Help.
- Form Fields:**
 - Also Known As (1):** A dropdown menu.
 - First Name (3):** Input field containing 'Patricia'.
 - Middle Name:** Empty input field.
 - Last Name:** Input field containing 'Lambert'.
 - Start Date (4):** Input field with a calendar icon.
 - End Date (5):** Input field with a calendar icon.
- Callout Box:** A yellow box with the text: 'Use the calendar icons to select Start and End dates.'

Conditions and Contacts

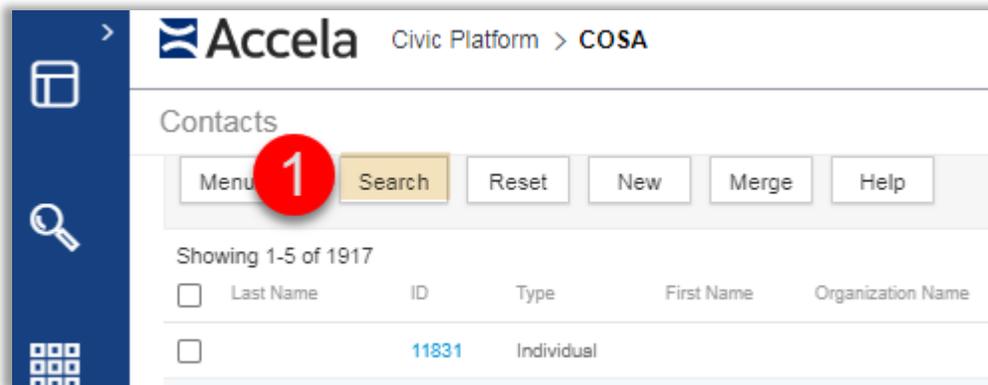
Conditions (notices) may be added to contacts. When a condition is added to a contact certain requirements are set on the contact. These requirements must be fulfilled before further actions proceed. Conditions do not necessarily impose holds; however, they may prolong the workflow process until they 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



- The Search page displays. **Click Search (#1)** to search for the Contact.



- The Contact search page displays (shown). **Click** to select Contact Type (#1 and #2).
- Type** known information (#3).
- Click Submit** (#4).

Accela Civic Platform > COSA

Contacts

Submit Reset Cancel Help Enable Soundex Search

Contact Type: Organization Reference Contact ID: Type: Organization

First Name Middle Name Last Name Suffix Title

Organization Name: B83 Business Name FEIN

E-mail

Primary Phone Secondary Phone

Birth Date: From To Evening Phone

EMAIL OPTION

Do not receive Email Notifications

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

Accela Civic Platform > COSA

Contacts

Menu Search Close Matches

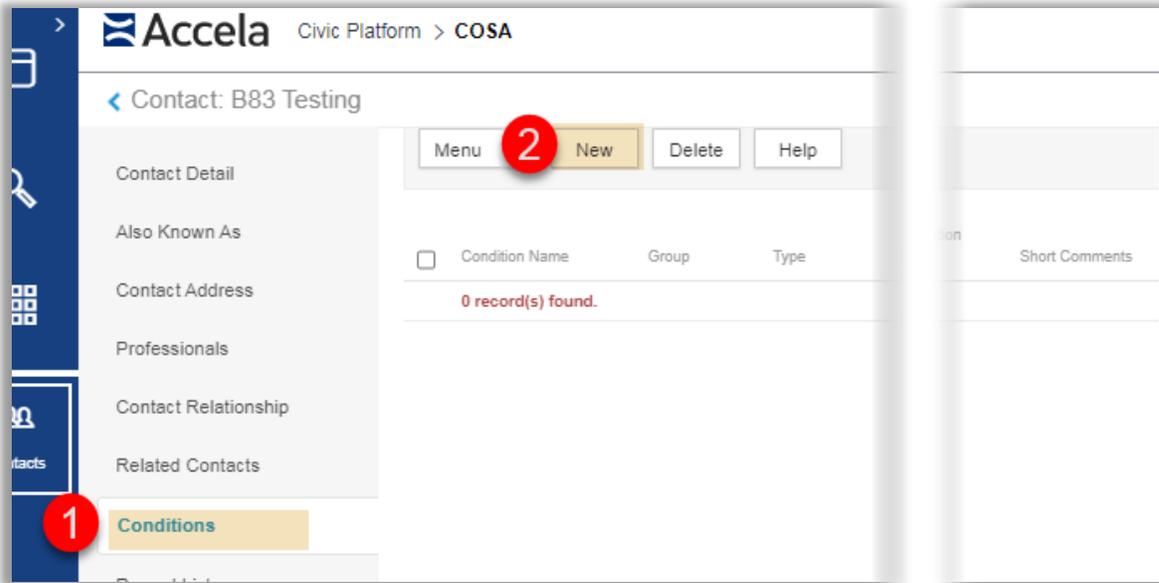
Showing 1 of 1

Last Name	ID	Type	First Name
	12181	Organization	

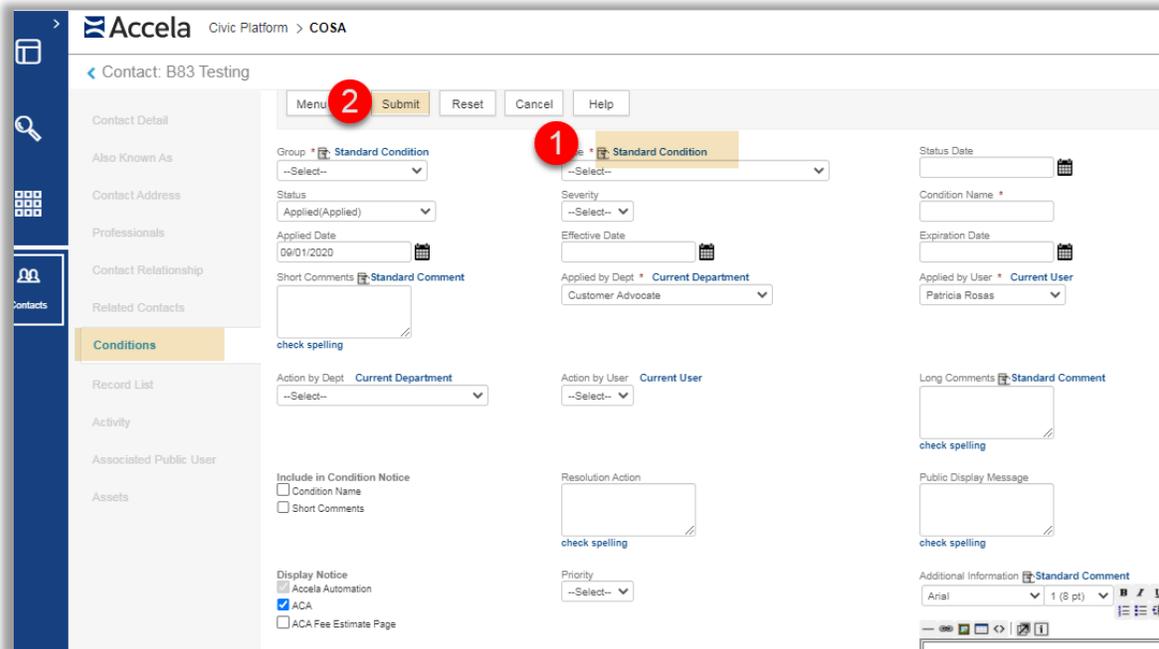
Status	Contact Type	Condition
Active	organization	

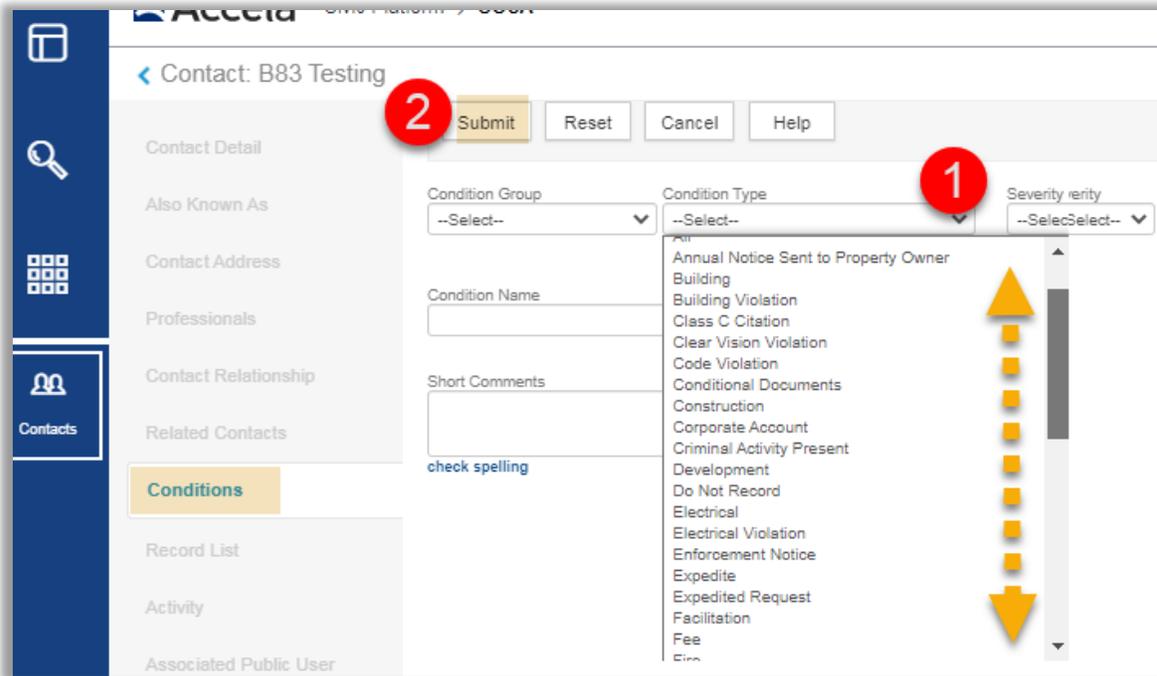
7. From the Contact record's navigation bar, **click** the Conditions tab (#1).

8. **Click** New (#2).

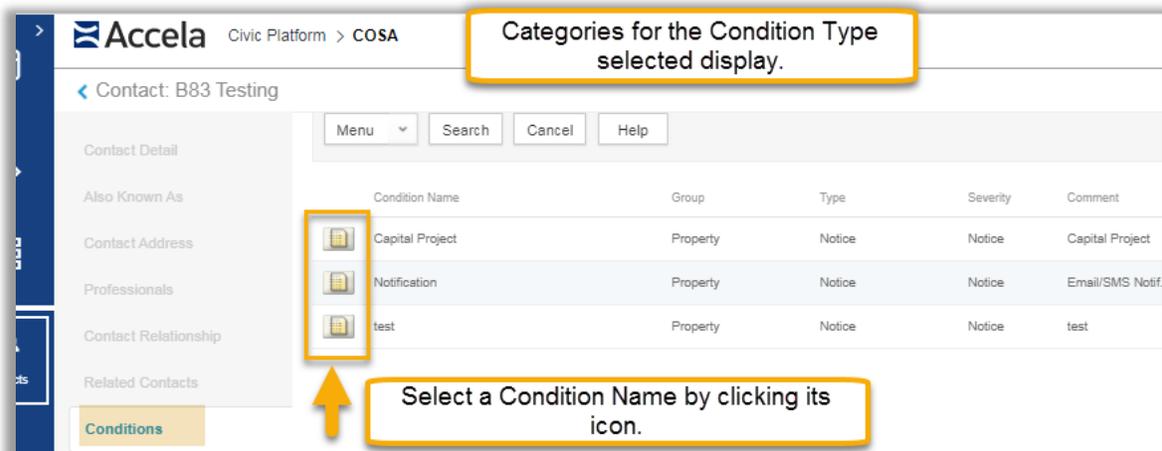


- 9. The Conditions template displays (shown). Click the Standard Condition link (#1) on this page.
- 10. Click Submit (#2).

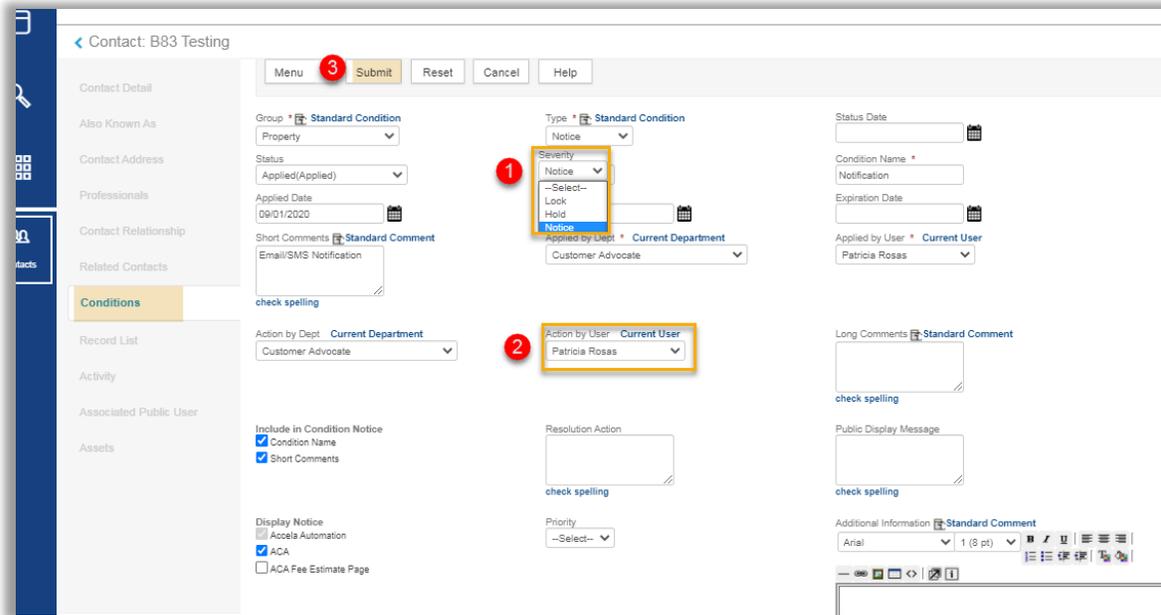




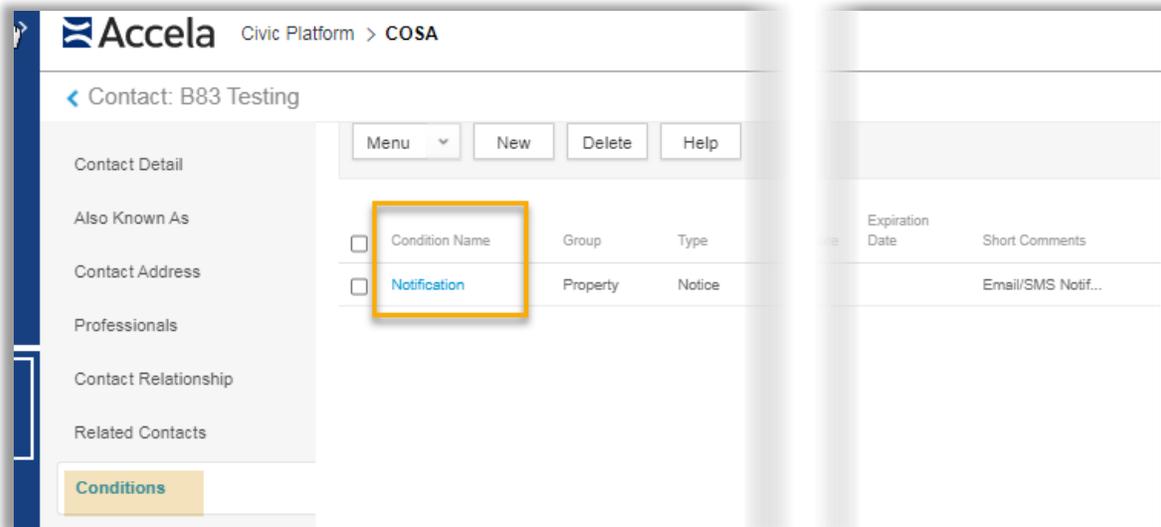
11. The Condition Type page displays. **Click** the Condition Type drop-down menu (#1). **Click** a condition to select it. Use the scroll bar to view all condition types.
12. **Click** Submit (#2).
13. Categories for the Condition Type selected display (shown). **Select** a Condition to apply to the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

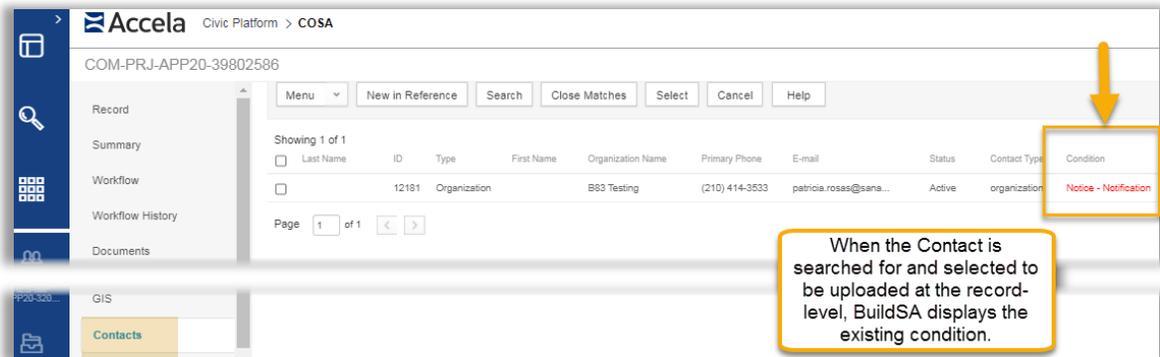
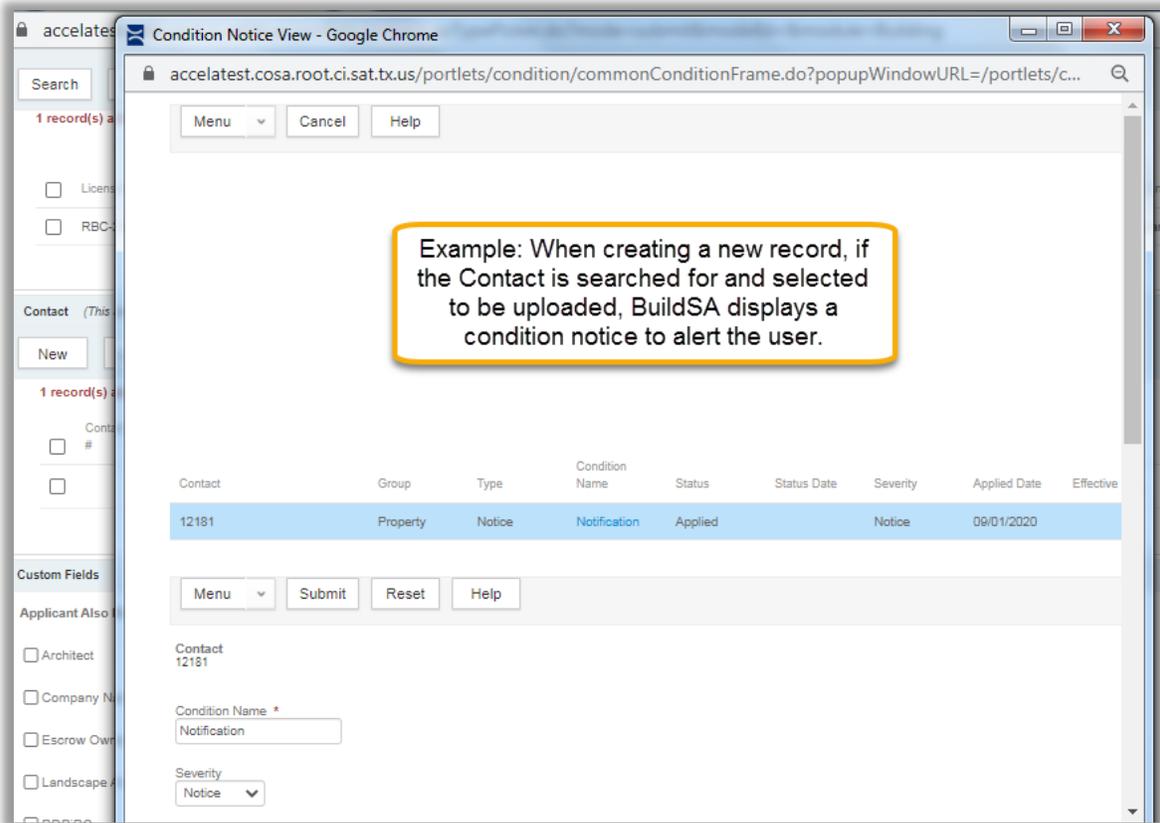


14. For this example, condition type of Notice is selected. BuildSA displays pre-configured conditions for this condition type (shown). **Select** Severity from this screen (#1). Ensure your name displays in Action By User field (#2). If working within a record and a condition is inheritable, the field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



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





Any record using the Contact display the Condition banner alerting the user of the Condition placed on the Contact.

Inheritable Conditions

The option to select an Inheritable Condition displays when a condition is added to a record.

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).

Accela Civic Platform > COSA

< Contact: JOHN C FRAKES

Menu New Delete Help

<input type="checkbox"/>	Condition Name	Group	Type	Severity	Status	Status Type	Short Comments
<input type="checkbox"/>	Notification	Property	Notice	Notice	Applied	Applied	Email/SMS Notif..

Click Condition Name link to open Condition page.

Conditions

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

Accela Civic Platform > COSA

Condition Detail

Menu Submit Reset Cancel Help

Condition History

Group * Property

Type * Notice

Condition Name * Notification

Status Applied(Applied)

Status Date

Severity Notice

Applied Date 09/27/2019

Effective Date

Expiration Date

Short Comments Standard Comment
Email/SMS Notification

Applied by Dept * Current Department
System Administrators

Applied by User * Current User
Patricia Rosas

Action by Dept * Current Department
--Select--

Action by User * Current User
--Select--

Long Comments Standard Comment

Include in Condition Notice
 Condition Name
 Short Comments

Resolution Action

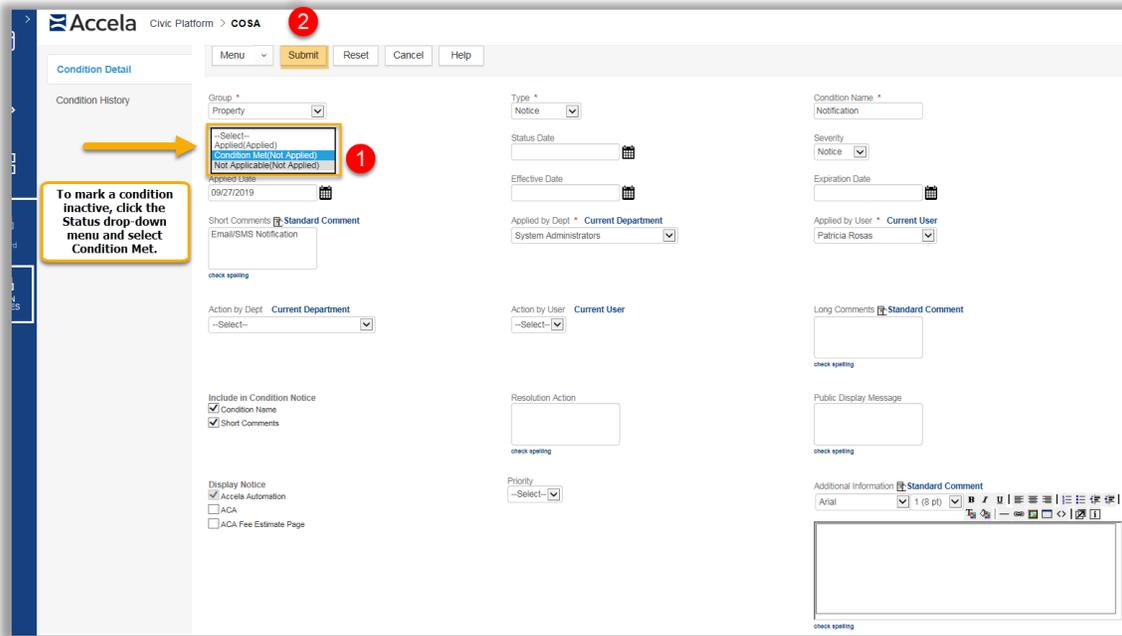
Public Display Message

Display Notice
 Accela Automation
 ACA
 ACA Fee Estimate Page

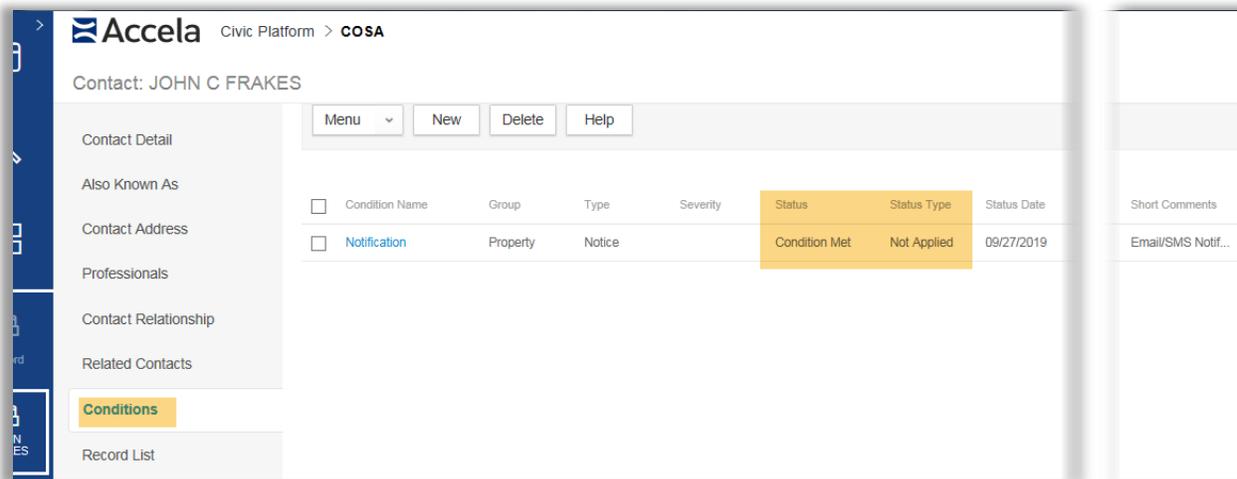
Priority --Select--

Additional Information Standard Comment
Arial 1 (8 pt)

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.

Accela Civic Platform > COSA

ZONING-ZV-2019-13300128

Parcel Detail

Cancel Help

District

City Parcel # * 241929 County Property ID 520475 Primary Y

Legal Description
NCB 13206 BLK 10 LOT 3

Block 10 Lot 3 NCB 13206 Plat #

Parcel Area 0 BCAD Geo ID Homestead Exempt

BCAD Situs Address
211 PATRICIA, SAN ANTONIO, TX 78216

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.

Accela Civic Platform > COSA

ZONING-ZV-2019-13300128

Record Summary Workflow Workflow History Documents Address Parcel

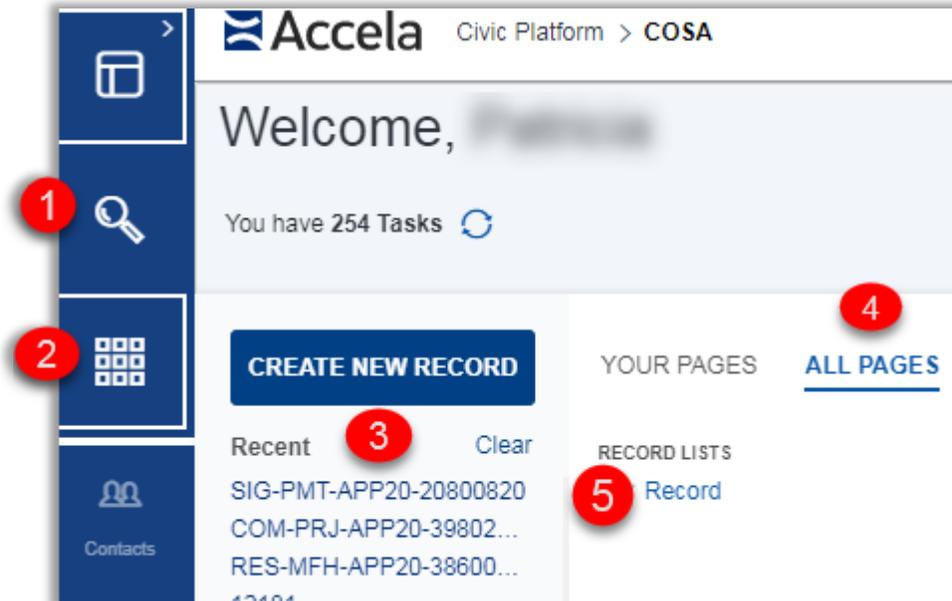
Menu Delete Look Up Search and S

<input type="checkbox"/>	City Parcel #	Primary	Legal Description	BCAD Geo ID
<input type="checkbox"/>	241929	Yes	NCB 13206 BLK ...	

Searching for Records

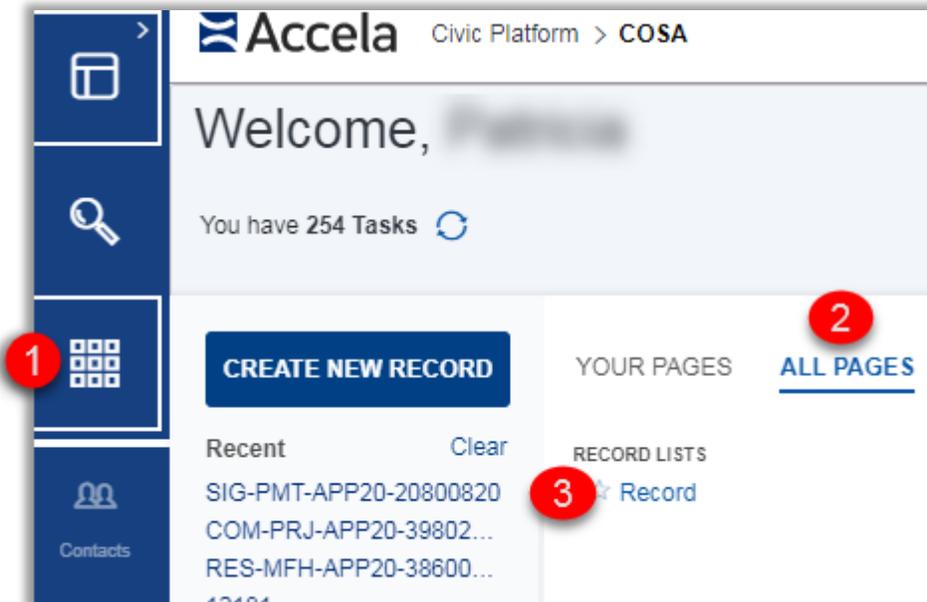
Use one of the methods below to locate a Record:

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).

Record

Menu Search New Create By Form Create From Model Delete GIS Create a Set View Log Help My Filters Select... Additional Information Required Addressing Board of Adjustment Land Entitlement MDP Nonconforming Use/Zoning Verification Plats PUD Vested Rights Zoning Module LandDevelopment

Showing 1-8 of 80+

To open a Record click on hyperlink.

ID	Record Type	Project Name	Status	Organization Name	First Name	Last Name	Opened Date	Description	Balance	Expiration Date	Related Records
17TEMP-000003	Plan Amendment	Applicati...			Michael	Forgione	06/12/2017		\$0.00	06/12/2017	View
17TEMP-000004	Master Development Plan (MDP)	Applicati...			Michael	Forgione	06/12/2017		\$0.00	06/12/2017	View
17TEMP-000005	Major Plat	Applicati...	Under Review		Michael	Fierros	06/12/2017		\$0.00	06/12/2017	View
17TEMP-000006	Minor Plat	Slid The P...			Michael	Forgione	06/12/2017		\$0.00	06/12/2017	View
17TEMP-000007	Address Verification and Assignment	The Trage...			MICHAEL	FRISBIE	06/12/2017		\$0.00		View
ADDR-AVAA-17-000001	Address Verification and Assignment	Pre-UAT T...	Under Review		Caryn	Moore	06/12/2017		PUBLICUSER75 \$0.00		View
ZONING-NCU-APP-2017-000001	Nonconforming Use/Development Preservation Rights Application	Applicati...	Received		MICHAEL	DUPONT	06/12/2017		141291 \$360.00		View
ZONING-ZV-2017-000004	Zoning Verification	Zoning Ve...	Under Review		Michael	Forgione	06/09/2017		141291 \$0.00		View

Filter for Record type from the My Filters drop-down menu.

Page 1 of 10 Use Arrows to move forward and back.

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

Record

Menu Search New Create By Form Create From Model

Showing 1-8 of 80+

ID	Record Type	Project Name	Status	Organization Name	First Name	Last Name	Opened Date	Description	Balance	Expiration Date	Related Records
17TEMP-000003	Plan Amendment	Applicati...									
17TEMP-000004	Master Development Plan (MDP)	Applicati...									

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

Accela Civic Platform > COSA

Record

Submit Reset Cancel New Help Enable Soundex Search

Search by Record Attributes

Record Type Group: --Select-- Type: --Select-- Subtype: --Select-- Category: --Select--

Opened Date: From: 08/11/1969 To: 07/30/2019

Record ID: Status: --Select--

Current Workflow Task: --Select-- Current Workflow Status: --Select--

Search by Custom Fields

Custom Fields Label: Custom Fields Value:

Custom Lists Field Name: Custom Lists Field Value:

Search by Condition

Condition Name: Condition Status:

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

Accela Civic Platform > COSA

Record

Submit Reset Cancel New Help Enable Soundex Search

_ Search by Record Attributes

Record Type Group: --Select--
 Type: --Select--
 Subtype: --Select--
 Category: --Select--

Opened Date From: 09/14/1970 To: 09/01/2020
 Application Name:

Record ID:
 Status: --Select--

Current Workflow Task: --Select--
 Current Workflow Status: --Select--

_ Search by Contact

First Name:
 Last Name:
 Contact Organization Name:
 E-mail:

_ Search by Address/Parcel

Street #:
 Street Name:
 Street Type: --Select--

Unit/Suite:
 Level:
 Building:
 Zip Code:

County Property ID:
 City Parcel Number:
 Legal Description:
[check spelling](#)

_ Search by Custom Fields

Custom Fields Label:
 Custom Fields Value:

Use any of the drop-down menu arrows to view options for refining your search.

7. Click *Submit*.

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

Record

Menu

My Filters --Select--

Showing 1-8 of 80+

ID	Record Type	Project Name	Status	Organ...	Opened Date	Description
<input type="checkbox"/> 18TMP-000379	Plan Amendment	Patricia C. Expedite >25 acres			01/17/2018	
<input type="checkbox"/> 18TMP-000382	Amend Plat	Amend Plat Retest	Received Online		01/17/2018	
<input type="checkbox"/> LAND-BSL-18-000018	Building Setback Line Replat	BSL Conditions Testing	Under Review		01/17/2018	
<input type="checkbox"/> LAND-BSL-18-000019	Building Setback Line Replat	BSL Conditions Back Office	Under Review		01/17/2018	
<input type="checkbox"/> LAND-PLAT-18-000052	Minor Plat	Patricia Minor public hearing fee ...	Under Review		01/17/2018	
<input type="checkbox"/> LAND-PLAT-18-000053	Minor Plat	Minor Plat Long Public Hearing Fee...	Under Review		01/17/2018	
<input type="checkbox"/> LAND-VACATE-18-000013	Vacate a Plat	Vacate Monies owed and DNR conditions	Under Review		01/17/2018	
<input type="checkbox"/> LAND-VACATE-18-000014	Vacate a Plat	Vacate BO Conditions Monies and DNR	Under Review		01/17/2018	

Page 1 of 10

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

Record

Enable Soundex Search

Search by Record Attributes

Record Type Group: --Select-- Type: --Select-- Subtype: --Select-- Category: --Select--

Record ID:

Current Workflow Task: --Select--

Search by Contact

First Name: Last Name:

Contact Organization Name: E-mail:

Opened Date: From: To:

Search by Address/Parcel

Street #: Street Name: Street Type: --Select--

Unit/Suite: City Parcel Number:

County Property ID: Legal Description:

Search by Custom Fields

Custom Fields Label: Custom Fields Value:

Custom Lists Field Name: Custom Lists Field Value:

In this example, a street name is added. Note: options to use Record Type information are available.

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.**

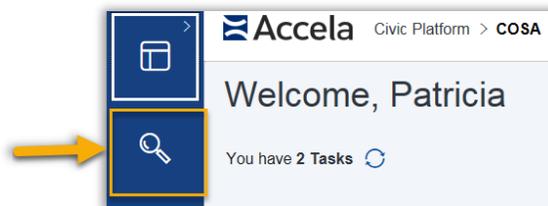
The screenshot shows the Accela Civic Platform interface for the COSA system. The 'Record' page is active, displaying a list of records. A dropdown menu is open, showing options like 'Assign', 'Recalculate', 'CSV Export', etc. A red box highlights the 'Assign' option, and a red arrow points to it. A text box above the arrow reads: "Do not use the Assign function from the Record page drop-down menu. Assigning from this page assigns an entire record. Do not use Assign from this page." The record list includes columns for ID, Description, Status, and Created By/Balance.

Created By	Balance
PUBLICUSER154	\$0.00
140638	\$0.00
142867	\$0.00
142867	\$0.00
PUBLICUSER393	\$0.00
JG09204	\$0.00
PUBLICUSER605	\$0.00
PUBLICUSER185	\$0.00

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).

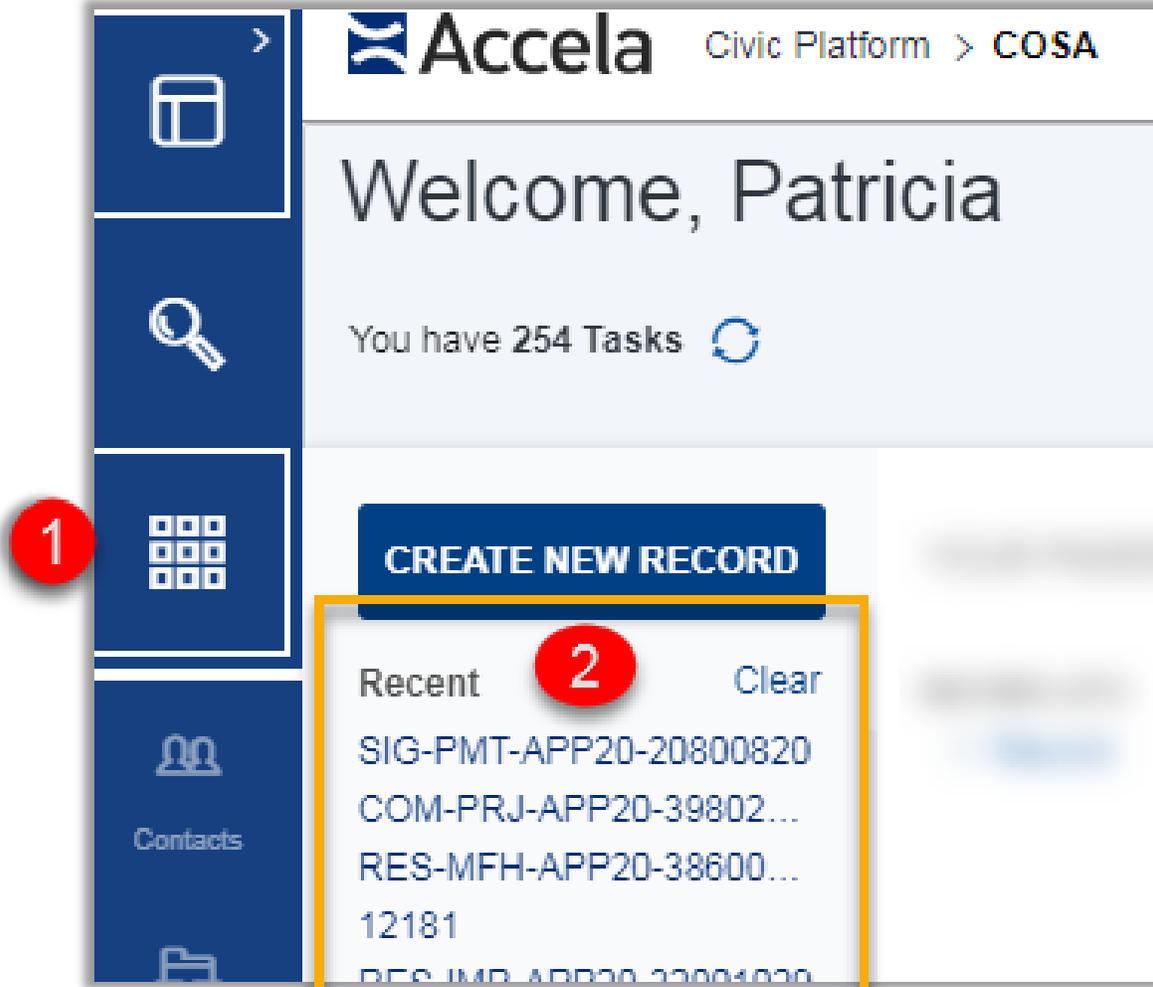
Clicking on any one of the type tabs allows user to navigate to the desired section (#1).

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).

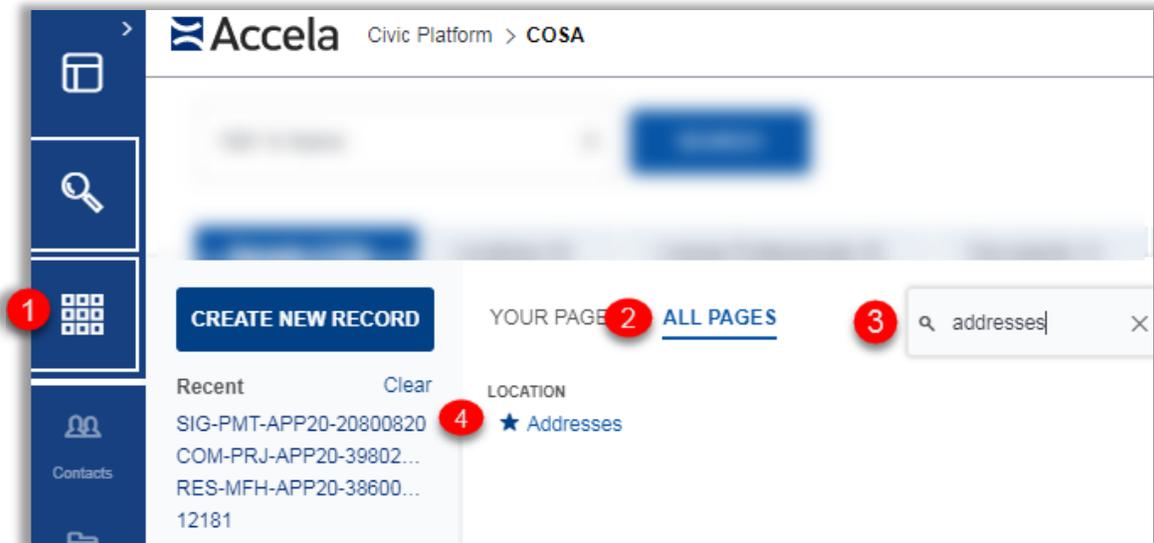


Addresses, Parcels and Owners (APOs)

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

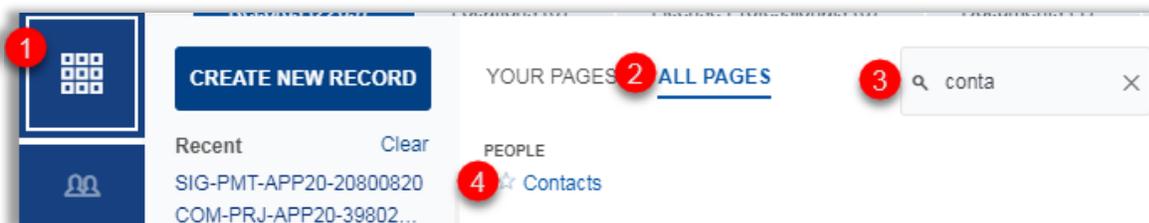
Addresses may be managed at the record level. Address information edited at the record level is synchronized with the database.

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).

Accela Civic Platform > COSA

Contacts

Menu Search Reset New Merge Help

Showing 1-10 of 10647

ID	Type	Last Name	First Name	Organization Name	Primary Phone
3529	Organization			PAPE-DAWSON ENG...	(949) 399-2500

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

Accela Civic Platform > COSA

Contacts

Submit Reset Cancel Help Enable Soundex Search

Contact Type
 Individual --Select--
 Individual
 Organization

Reference Contact ID Type

Middle Name Last Name Suffix Title

Organization Name Business Name FEIN

E-mail

Primary Phone Secondary Phone

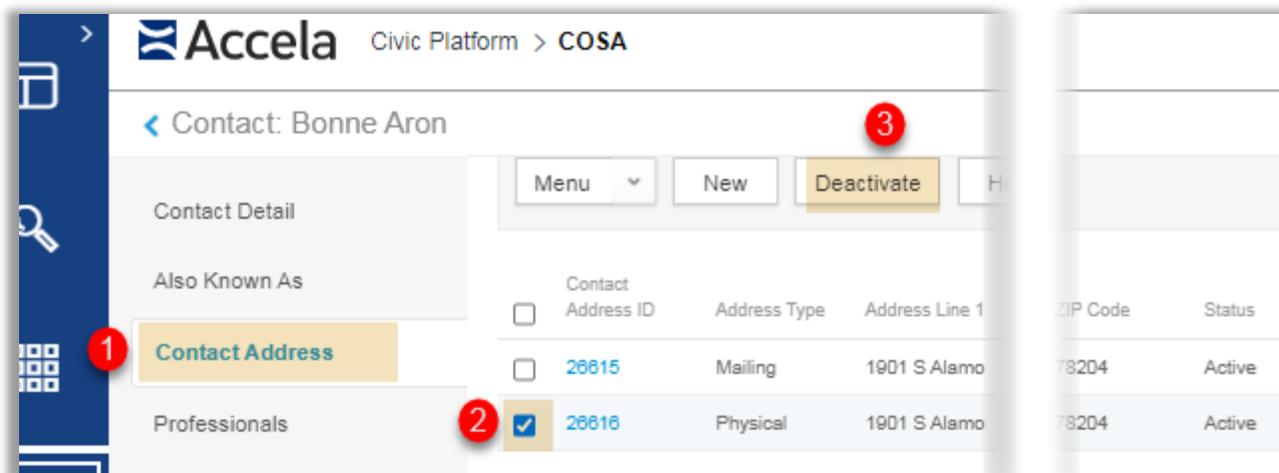
Birth Date:
 From
 To

Evening Phone

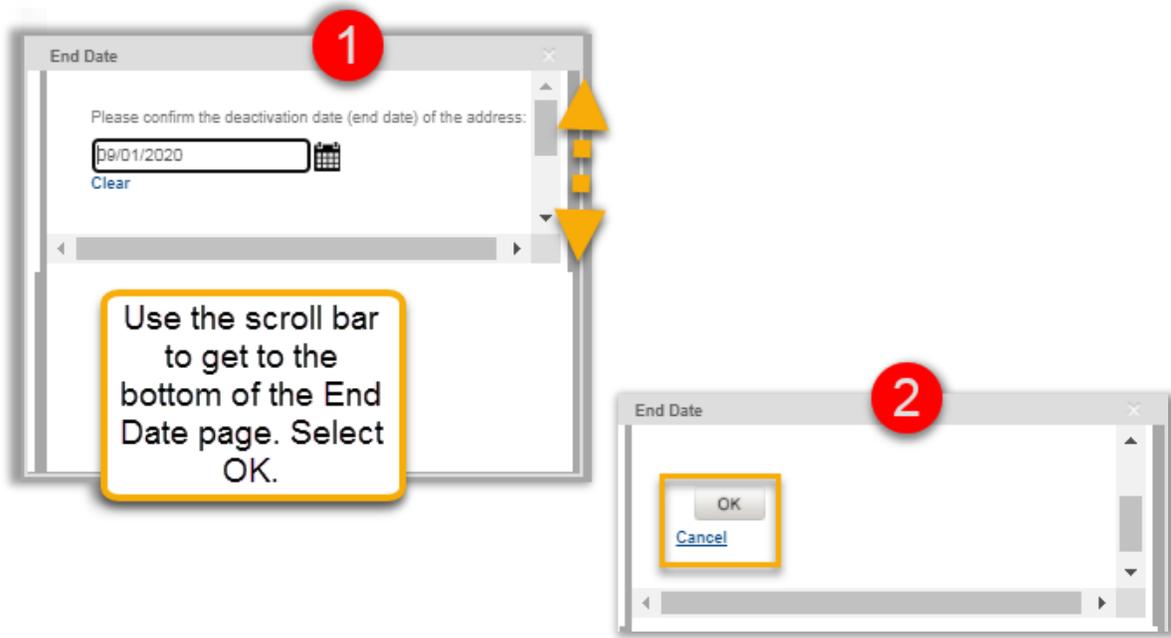
6. **Click** Submit. BuildSA returns all matches for your search. **Click** the Last Name or ID hyperlink of your selection.



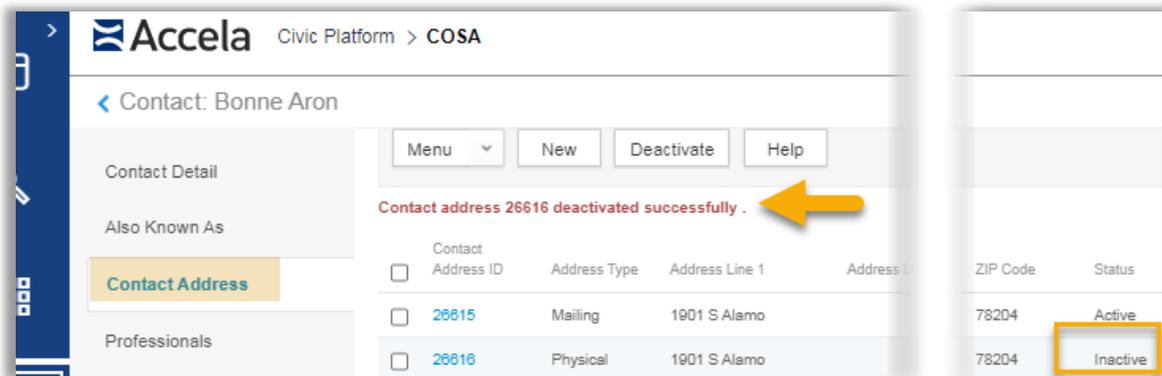
7. The Contact Details page displays (shown). **Click** the Contact Address tab (shown). **Click** the box to the left of the Contact Address ID you wish to deactivate (#2).
8. **Click** Deactivate (#3).



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.

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

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

Conditions display as banners across the top of a record's page.

<input type="checkbox"/>	Display Order	Condition Name	Group	Type	Severity	Applied by Dept	Applied by User	Status	Condition Status Type	Object Value
<input type="checkbox"/>		Active (N...	Administr...	Hold		Customer ...	Patricia Rosas	Condition...	Not Applied	19CAQ-000...
<input type="checkbox"/>		Capital P...	Property	Notice		Customer ...	Patricia Rosas	Condition...	Not Applied	19CAQ-000...
<input type="checkbox"/>		Notification	Property	Notice		Customer ...	Patricia Rosas	Condition...	Not Applied	19CAQ-000...
<input type="checkbox"/>		Notification	Property	Notice		Customer ...	Patricia Rosas	Condition...	Not Applied	19CAQ-000...
<input type="checkbox"/>		Notification	Property	Notice	Notice	Customer ...	Patricia Rosas	Applied	Applied	19CAQ-000...
<input type="checkbox"/>		Stop Work...	Enforcement	Code Viol...		Customer ...	Patricia Cavazos	Condition...	Not Applied	7779
<input type="checkbox"/>		Stop Work...	Enforcement	Code Viol...		Customer ...	Patricia Cavazos	Condition...	Not Applied	7779

Condition hyperlinks.

- 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).

Change the status of a condition here.

Type any comments here.

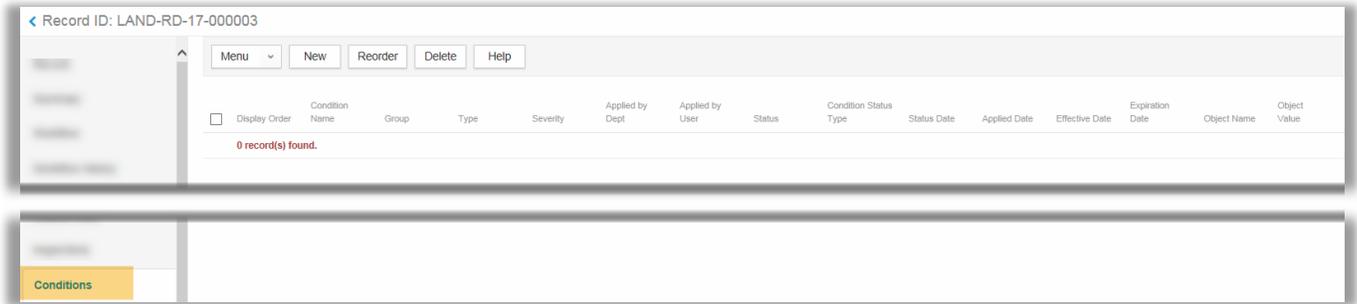
For questions about the condition, contact the person who placed the condition on the record.

Adding a Condition to a Record

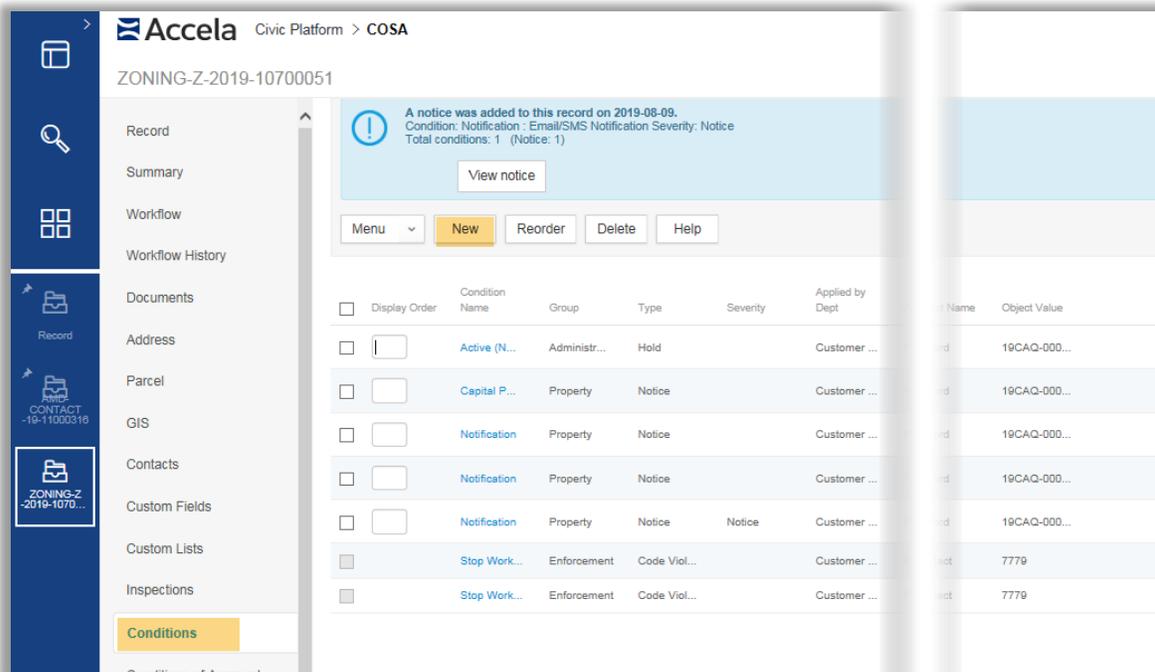
The steps below walk you through the process of adding a Condition to a Record.

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

- Retrieve the Record.
- 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!

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ZONING-Z-2019-10700051

A notice was added to this record on 2019-08-09.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Submit Reset Cancel Help

Condition Name *

Group * **Standard Condition**

Type * **Standard Condition**

Severity

Applied Date

Effective Date

Expiration Date

Inheritable *

Status

Status Date

Action by Dept **Current Department**

Action by User **Current User**

Applied by Dept * **Current Department**

Applied by User * **Current User**

Display Notice Accela Automation
 ACA
 ACA Fee Estimate Page

Include in Condition Notice Condition Name
 Short Comments

Priority

Resolution Action

check spelling

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

ADDR-COD-18-000304 - COSA GEN FUNCTIONALITY TRNG02

A notice was added to this record on 2018-05-31.
Condition: Lease Agreement,Letter of Agent : because the Applicant is not the Property Owner. Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu Submit Reset Cancel Help

Condition Group

Condition Type Severity

Condition Name

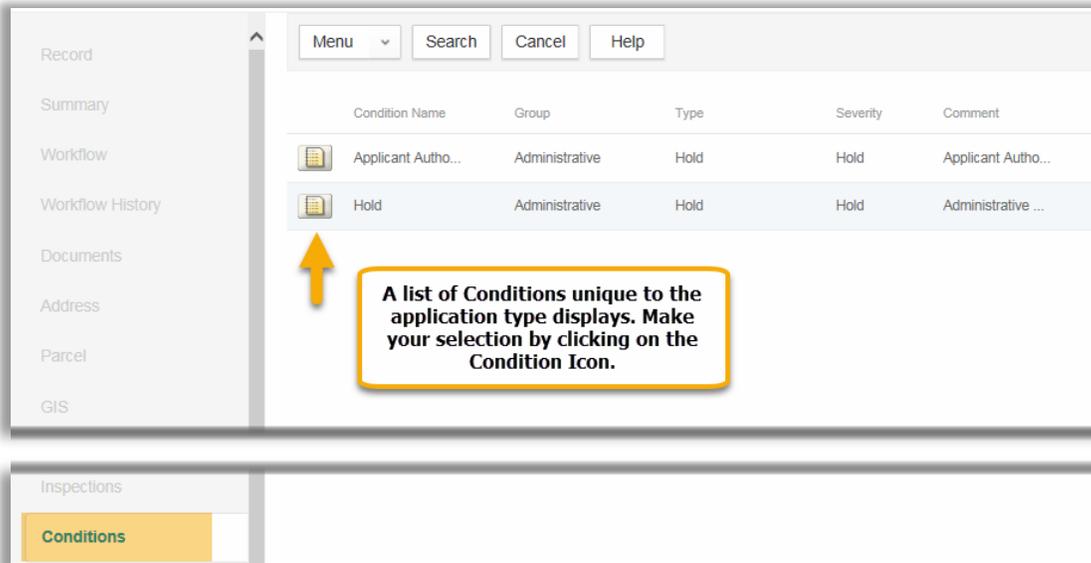
Short Comments

check spelling

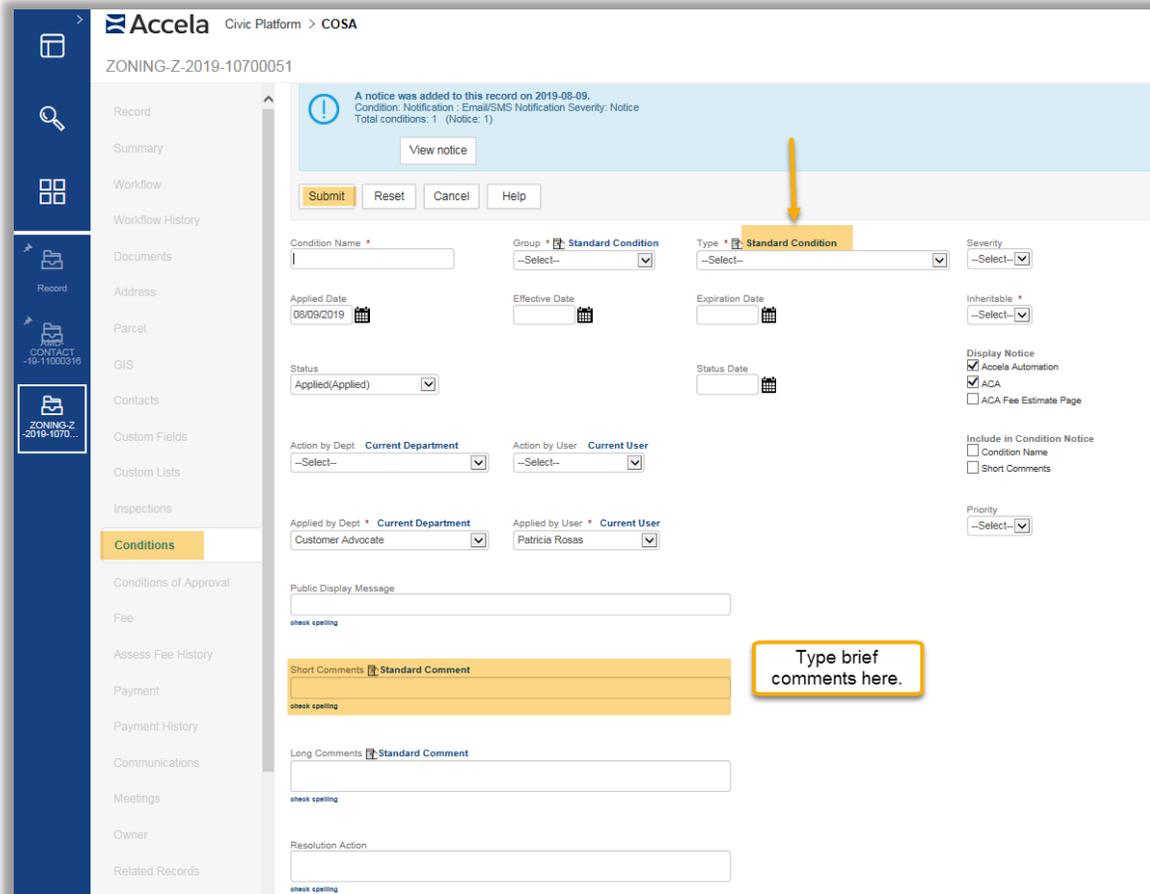
Condition Type dropdown menu items:

- Select--
- Code Violation
- Conditional Documents
- Development
- Do Not Record
- Enforcement Notice
- Expedite
- Facilitation
- Hold
- ICRIP Approved
- Notice
- Overtime
- Plan Amendment
- Verify that the project has been review

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.

Applied by Dept * **Current Department**
Land Entitlements Admin Supp

Applied by User * **Current User**
Patricia Rosas

Priority
--Select--

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

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Conditions of Approval

Meetings

Submit Reset Cancel Help

Condition Name *
Notification

Type * Standard Condition
Notice

Severity
Notice

Applied Date
01/24/2018

Effective Date

Expiration Date

Inheritable *
No

Status
Applied(Applied)

Status Date

Display Notice
 Acelea Automation
 ACA
 ACA Fee Estimate Page

Action by Dept **Current Department**
Land Entitlements Admin Supp

Action by User **Current User**
Patricia Rosas

Applied by Dept * **Current Department**
Land Entitlements Admin Supp

Applied by User * **Current User**
Patricia Rosas

Public Display Message

Short Comments Standard Comment

Include in Condition Notice
 Condition Name
 Short Comments

Priority
--Select--

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

Record ID: ZONING-Z-2016-000047

A notice was added to this record on 2018-01-24.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu New Reorder Delete Help

Display Order	Condition Name	Group	Type	Severity	Applied by Dept
<input type="checkbox"/>	Expedited...	Default	Administr...	Notice	Land Enti...
<input type="checkbox"/>	Expedited...	Default	Administr...	Notice	Land Enti...
<input type="checkbox"/>	Notification	Default	Notice	Notice	Land Enti...
<input type="checkbox"/>	Verify th...	Default	Verify th...		Land Enti...

Status	Condition Status Type	Status Date	Applied Date	Effective Date
Applied		11/23/2016	11/23/2016	11/23/2016
Applied		11/23/2016	11/23/2016	11/23/2016
Applied	Applied		01/24/2018	
Condition...	Not Applied	02/24/2017	02/24/2017	

Refresh button (C icon) with arrow pointing to it.

15. The Condition is now added to the Record (shown).

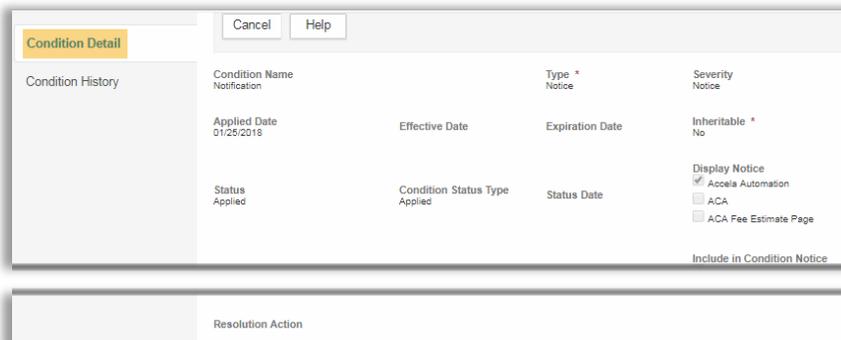
❖ **NOTE:** Clicking on the **View notice** button takes you to the **Conditions detail page** (shown).



Making a Condition Inactive

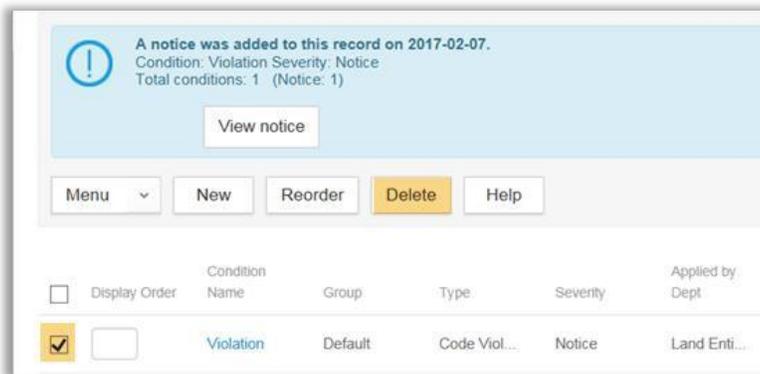
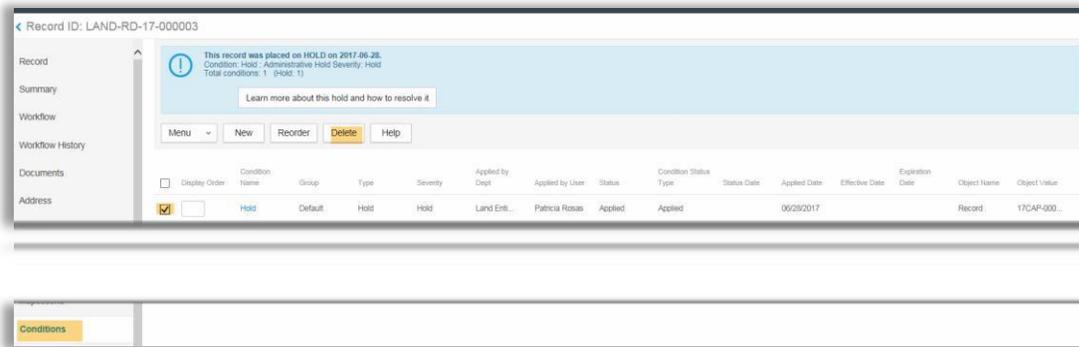
❖ **IMPORTANT:** Conditions become **Inactive** and stay part of the history of the record—they are never deleted.

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).

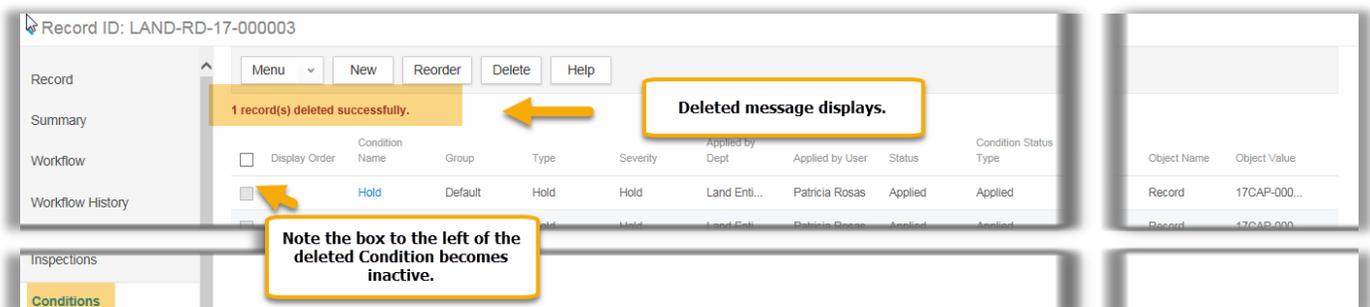


To make a condition inactive

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



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



- 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.

Record ID: LAND-RD-17-000003

Condition Detail Cancel Help

Condition History

Condition Name Hold	Type * Hold	Severity * Hold
Applied Date 06/28/2017	Effective Date	Expiration Date
Status Applied	Condition Status Type Applied	Status Date
Action by Dept	Action by User	Display Notice <input checked="" type="checkbox"/> Acelea Automation <input checked="" type="checkbox"/> ACA <input type="checkbox"/> ACA Fee Estimate Page
Applied by Dept Land Entitlements Admin Support	Applied by User Patricia Rosas	Include in Condition Notice <input checked="" type="checkbox"/> Condition Name <input checked="" type="checkbox"/> Short Comments
Public Display Message		Priority
Short Comments Administrative Hold		Object Name Record
Long Comments		Object Value 17CAP-00000-00083
Resolution Action		

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

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Conditions

Menu ▼ New Reorder Delete Help

1 record(s) deleted successfully. 

<input type="checkbox"/>	Display Order	Condition Name	Group	Type	Severity	Applied by Dept	Applied by User	Status
<input type="checkbox"/>		Violation	Default	Code Viol...	Notice	Land Enti...	Patricia Rosas	Applied

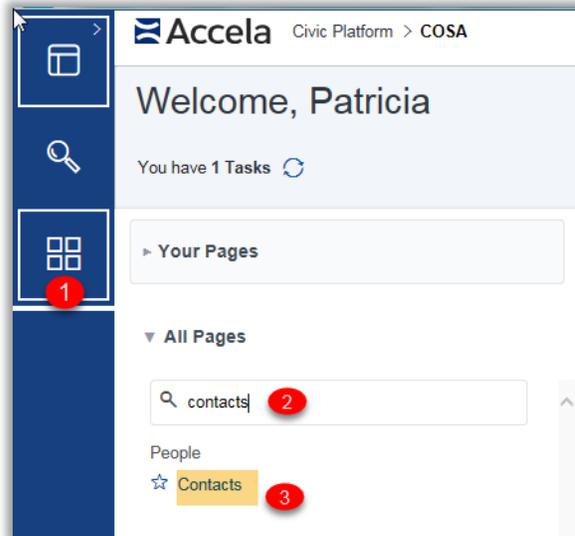
 **Note the check box to the left of the Condition is not active.**

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

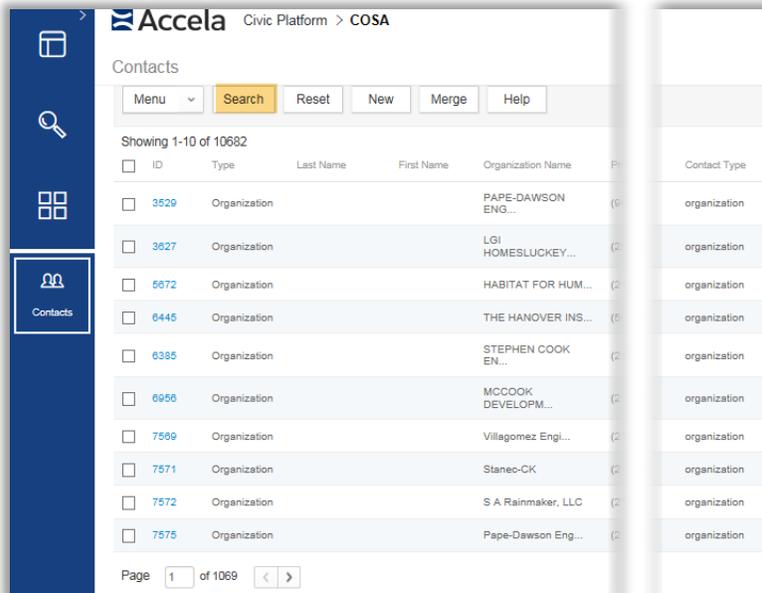
Conditions and Addresses, Contacts or Parcels

❖ **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).



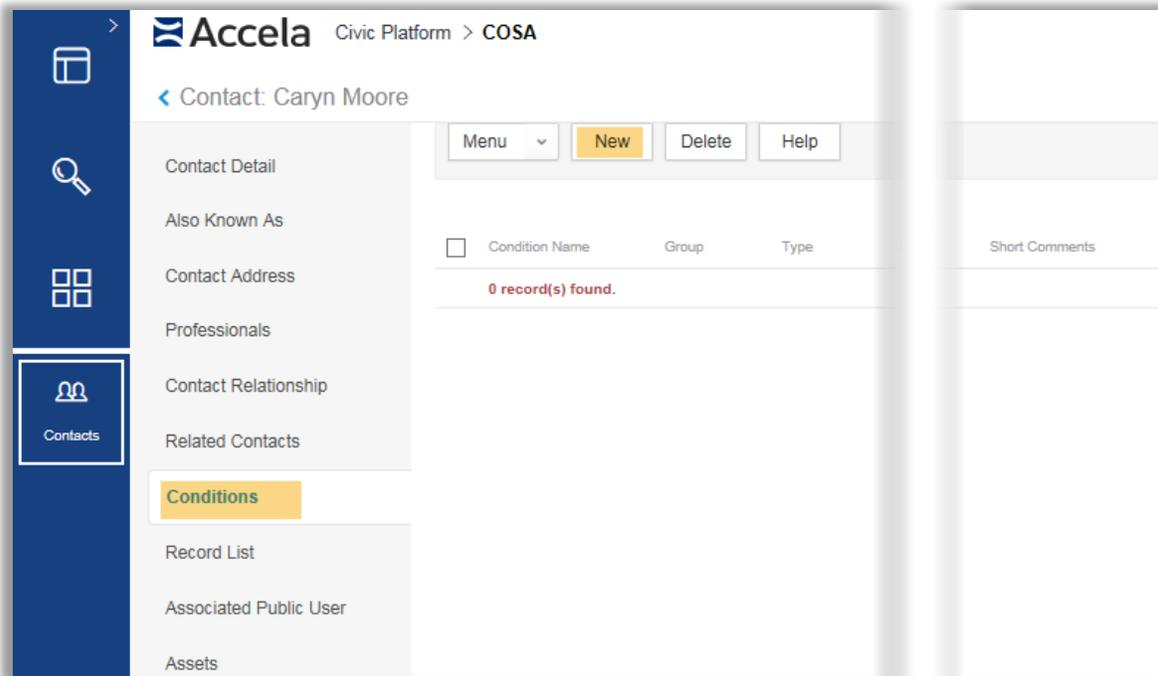
5. **Select** Contact Type from drop-down menu options: Individual or Organization (shown).
6. **Complete** other fields on the page with information you may have.

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).

ID	Type	Last Name	First Name	Status	Contact Type
8973	Individual	Moore	Conan...	Active	individual
10983	Individual	Moore	Conan...	Active	individual

9. The Contact detail page displays (shown). From the Contact Detail page navigation bar, click the Conditions Tab (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).

← Contact: mic kuren

Menu ▾ Submit Reset Cancel Help

Contact Detail

Also Known As

Contact Address

Contact Relationship

Related Contacts

Conditions

Record List

Condition Group: --Select--

Condition Name:

Short Comments:

check spelling

Condition Type: --Select--

- Code Violation
- Conditional Documents
- Development
- Do Not Record
- Enforcement Notice
- Expedite
- Facilitation
- Hold
- ICRIP Approved
- Notice
- Overtime
- Plan Amendment
- Verify that the project has been reviewed by HDRC

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).

← Contact: Patricia Rosas

Menu ▾ Search Cancel Help

Condition Name	Group	Type	Severity	Comment
 Capital Project	Property	Notice	Notice	Capital Project
 Notification	Property	Notice	Notice	Email/SMS Notif...

Condition Icons

Conditions

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

Condition Name	Group	Type	Severity	Comment
Capital Project	Property	Notice	Notice	Capital Project
Notification	Property	Notice	Notice	Email/SMS Notif...

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

Note that some fields pre-populate.

If the box to the left of ACA is checked, then the customer is able to view comments.

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**.

Accela Civic Platform > COSA

Contacts

Menu Search Reset New Merge Help

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<input type="checkbox"/>	Last Name	ID	Type	First Name	Organization Name	Primary Phone	E-mail	Status	Contact Type	Condition
<input type="checkbox"/>		11831	Individual			(848) 410-5187	gm.yusuuf@gcomsoft.com	Active	individual	
<input type="checkbox"/>		13737	Individual			(210) 207-0275	joe.pardo@sanantoni...	Active	individual	
<input type="checkbox"/>		12029	Neighborn...		ABC LLC	(904) 592-5882	latha.devireddy@goo...	Active	organization	Lock - Active (Not Met) Lock
<input type="checkbox"/>		11840	Organization		THE GOLDEN COMP...	(111) 111-1111	shashank@gcomsoft.com	Active	organization	
<input type="checkbox"/>		11832	Organization		Safe Sprinkler ...	210	lawrence.estrada@sa...	Active	organization	

Page 1 of 383

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

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Contacts

1 Submit Reset Cancel Help Enable Soundex Search

Contact Type: --Select--
 --Select--
 Individual
 Organization

Reference Contact ID:

Type: --Select--

Middle Name:

Last Name:

Suffix:

Title:

Organization Name:

Business Name:

FEIN:

E-mail:

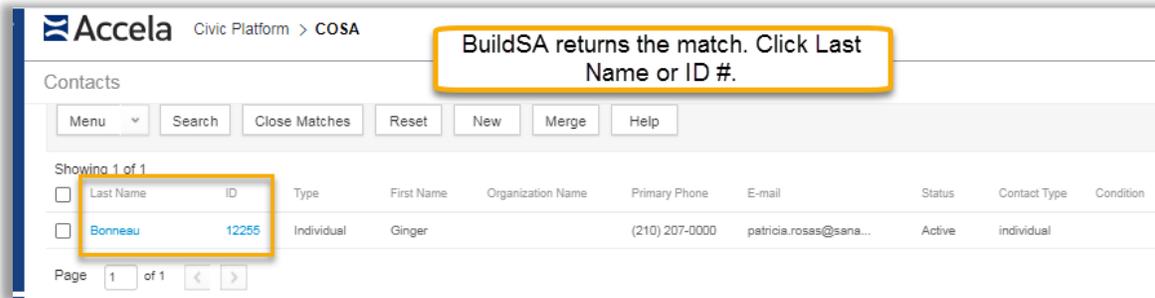
Primary Phone:

Secondary Phone:

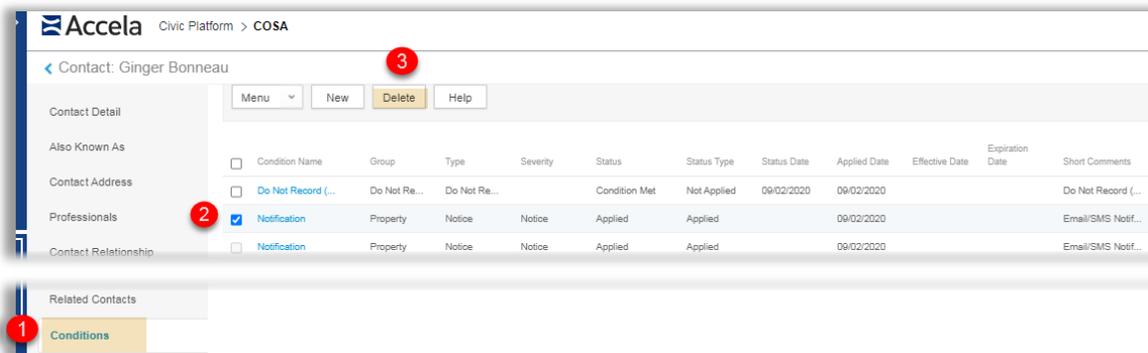
Birth Date: From To

Evening Phone:

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

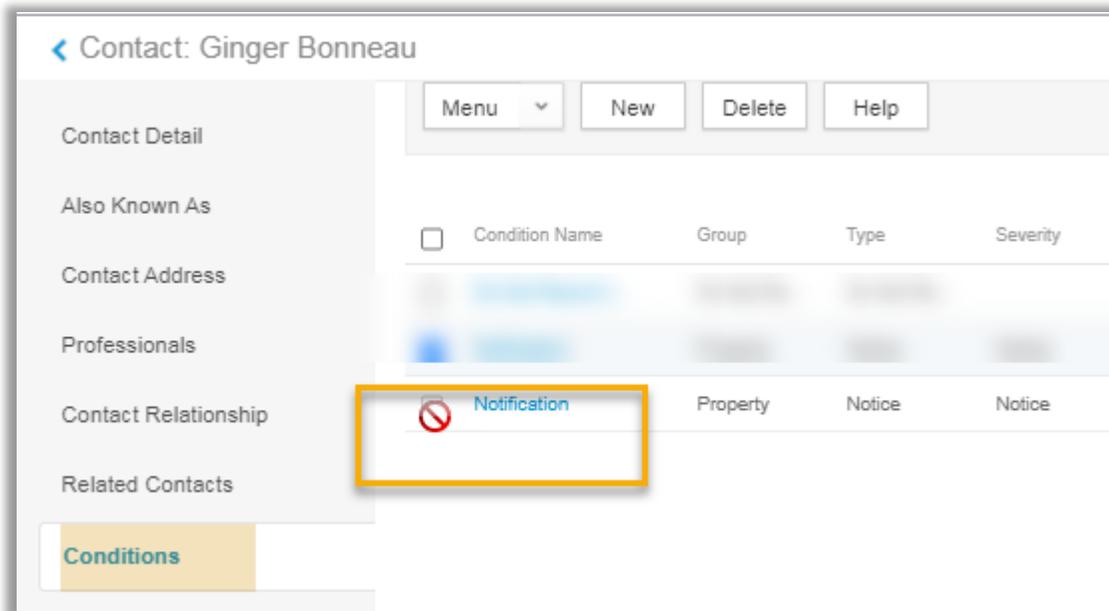


5. The Contact detail page displays (shown).
6. From the Contact Detail page navigation bar, click the Conditions Tab (#1).
7. Click the box to the left of the Condition you want to Delete (deactivate) (2). **Even though Delete is selected, the Condition becomes inactive. Once a condition is created, 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!

This is the Record's navigation bar. Clicking on any of the options takes you to that particular section of the Record.

Use the scroll bars to move up and down the navigation bar and view all sections available.

Record

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Conditions of Approval

Fee

Assess Fee History

Payment

Payment History

Communications

Meetings

Owner

Related Records

Status

Comments

Renewal Info

A notice was added to this record on 2017-06-30.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 2 (Notice: 2)

View notice

Menu Save Reset Summary Help

ALT ID: 16TMP-000361 Record Type: LandDevelopment/Land Entitlement/Rights D Initiated by Product: ACA

Status: Received Online Opened Date: 10/13/2016 Expiration Date: Balance: 0.00

Short Notes

Application Name: Tamarak Project Record ID: 16EST-00000-00438

- ❖ *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).

Record ID: LAND-RD-17-000004

Menu Help

The Summary Page gives the user a general overview of the Record.

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

Application Type: Rights Determination
 Initiated by Product: AV200
 Application Status: Denied
 File Date: 05/30/2017
 Application Name: RD Test

Contact Info

Name	Organization Name	Contact Type	Relationship	Address	Contact Primary Address	Status	Contact Start Date	Contact End Date
Caryns Property Owner	Caryns Business	Applicant	Property Owner		Mailing, 131g N, test... Mailing, 1001 S Alamo...	Active	05/30/2017	05/30/2017

Description of Work:
 Application Comments: View ID Comment Date

Workflow Status

Task	Assigned To	Status	Status Date	Action By
Application Intake		Received	05/30/2017	Caryn Moore
Completeness Review	Martha Bernal	Completed	05/30/2017	Caryn Moore
Technical Review		Denied	05/30/2017	Caryn Moore
Final Decision		Denied	05/30/2017	Caryn Moore
Closure				

Adhoc Task Status:

Task	Assigned To	Status	Status Date	Action By

Custom Fields

PROJECT INFORMATION

Project Description	Describe current (and/s) of the property	Nature of the Project
Project Description	Current property use.	Nature of the Project
Total land area (in acres)	Total area of impervious surface (in acres)	Phases of Development (if applicable)
10	10	
List ordinances which the Project above will seek exception to; based on rights request date	Requested date for claim of rights for this Project	Specify the amount, date and purpose of each expenditure incurred in reliance on permits
List of ordinances	05/30/2017	Permits
Describe any construction or related actions that have taken place on the property since that date	No	
Construction		

STAFF REVIEW

Effective Date	Final Decision Date

ACREAGE AND AMOUNT DWELLINGS

Unit Type	If Other Unit Type, please Specify	Number of Buildings (Number)	Number of Residential Units (Number)	Number of Residential Lots (Number)	Square Footage of Buildings (Number)	Acreage (Number)	If Mixed Use, Please Specify
Single Family Residential						10	

STAFF REVIEW

Actual Unit Type	If Actual Unit Type is Other, please Specify	Actual Number of Buildings (Number)	Actual Number of Residential Units (Number)	Actual Number of Residential Lots (Number)	Actual Square Footage of Buildings (Number)	Actual Acreage (Number)	If Mixed Use, Please Specify

GIS JURISDICTIONS

Type	Value	Parcel

GIS LAND DEVELOPMENT

Type	Value	Parcel

GIS WATER AREAS

Type	Value	Parcel

GIS ZONING OVERLAY

Type	Value	Parcel

Condition Status:

Name	Short Comments	Status	Apply Date	Severity	Action By

Conditions of Approval:

Group	Type	Condition Name	Short Comments	Status	Status Date	Severity

Documents

File Name	Document Group	Category	Description	Type	Document Status	Document Status Date
fox.jpg	LAND_RID	Original Applic...		image/jpeg	Uploaded	05/30/2017
pdwm.jpg	LAND_RID	Permit Contracts		image/jpeg	Uploaded	05/30/2017

Show all

Address: 132 FELISA ST City of San Antonio, TX 78210

Parcel No: 41587

Total Fee Assessed: \$1,010.00

Total Fee Invoiced: \$1,010.00

Balance: \$0.00

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).

Record Summary Workflow Workflow History Documents Address Parcel GIS Assess Fee History **Payment**

Pay Apply Refund Void Generate Receipt Fund Transfer Trust Account Deposit Help

Total Invoice Amount: \$4,059.20
 Total Payments: \$4,059.20
 Total Balance: \$0.00
 Amount Not Applied: \$0.00

Terminal #: PR16000
 Cashier ID: 0125/2018
 Date: 01/25/2018

Invoices

Invoice #	Amount	Paid in Full	Balance
2767	\$4,059.20	Y	\$0.00

Transactions

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status	Received	Trust Account ID	Cashier ID	Date
	Payment	Trust Account	1474	\$0.00	\$4,059.20	Paid		25690	QMD4601	01/23/2018

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.

PLAT-OUTSEQREC-18-000026 - COSA GEN FUNCTIONALITY TRNG 01

Conditions of Approval

Fee

Assess Fee History

Payment

Payment History

Communications

Meetings

Owner

Related Records

Comments

Renewal Info

A notice was added to this record on 2018-05-31.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 2 (Notice: 2)

View notice

Menu Search Help

Showing 1-5 of 5

Date	Content	Status	Action By	Type
05/31/2018 14:52:00	Lighthouse.jpg	Uploaded	Patricia Rosas	Document
05/31/2018 14:51:39	Koala.jpg	Uploaded	Patricia Rosas	Document
05/25/2018 14:00:17	Receipt Confirmation for Out of Se...	Sent	noreply@sananto...	Email
05/25/2018 14:00:14	Desert.jpg	Uploaded	Patricia Rosas	Document
05/25/2018	Application Intake	Received	Patricia Rosas	Workflow History

Page 1 of 1

Activities

Consolidated Record Activities

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.

Record's navigation bar.

Record

Summary

Workflow

Workflow History

Documents

Address

Workflow Tasks

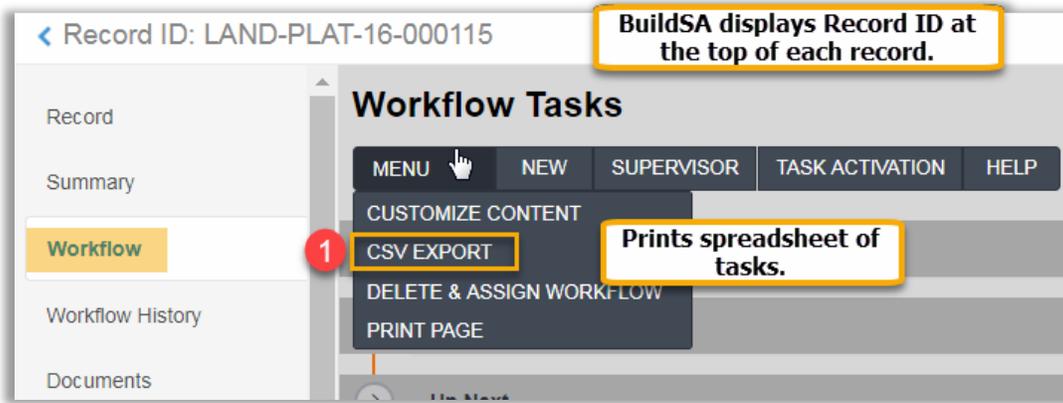
MENU NEW SUPERVISOR TASK ACTIVATION HELP

1 Click the green arrow to view and access Completed Tasks.

2 Click the orange arrow to view and access In Progress Tasks.

3 Click the grey arrow to view Up Next Tasks.

VIEW HISTORY



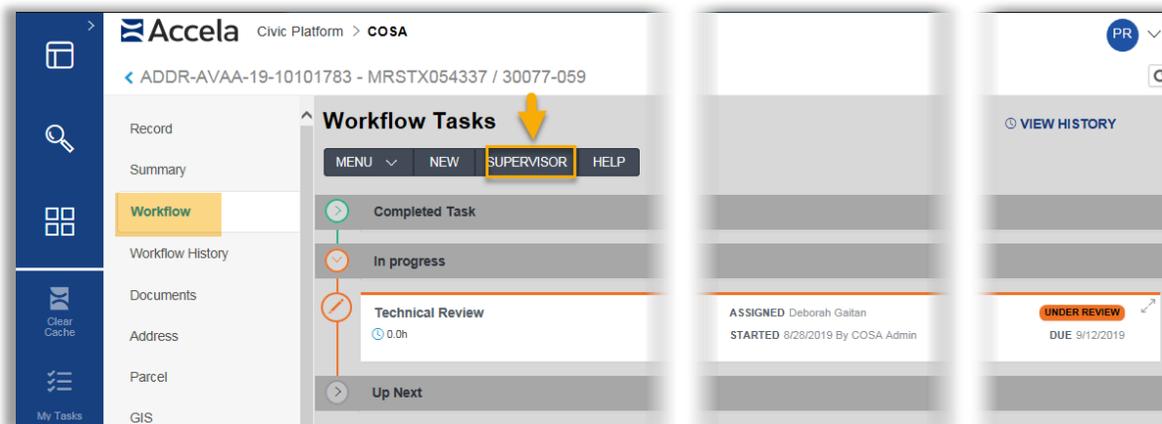
IMPORTANT: Using *Delete & Assign Workflow* or *Customize Content* options from this drop-down menu is not a business process. Do Not Use.

Activating/Deactivating Tasks

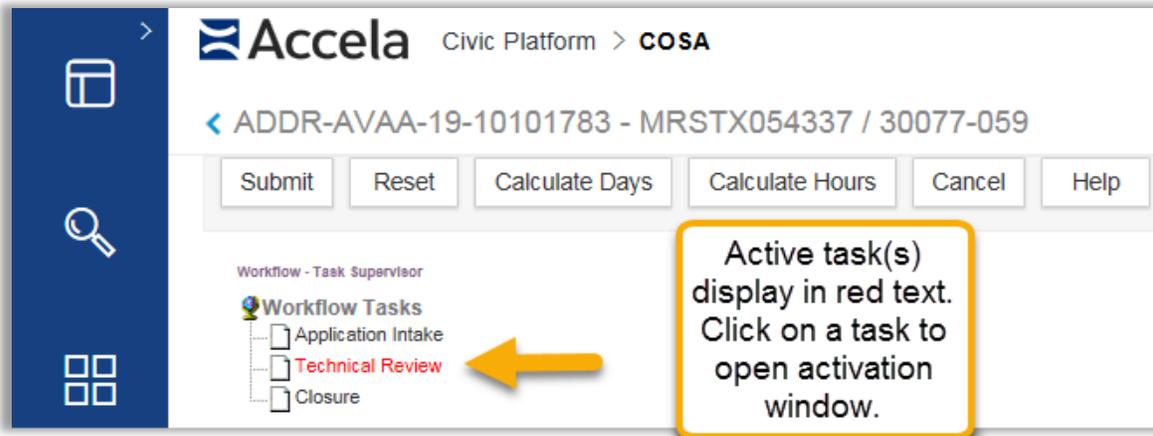
Managers/Supervisors may activate or deactivate a task. Applying this function to a record impacts the workflow process of the record.

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).



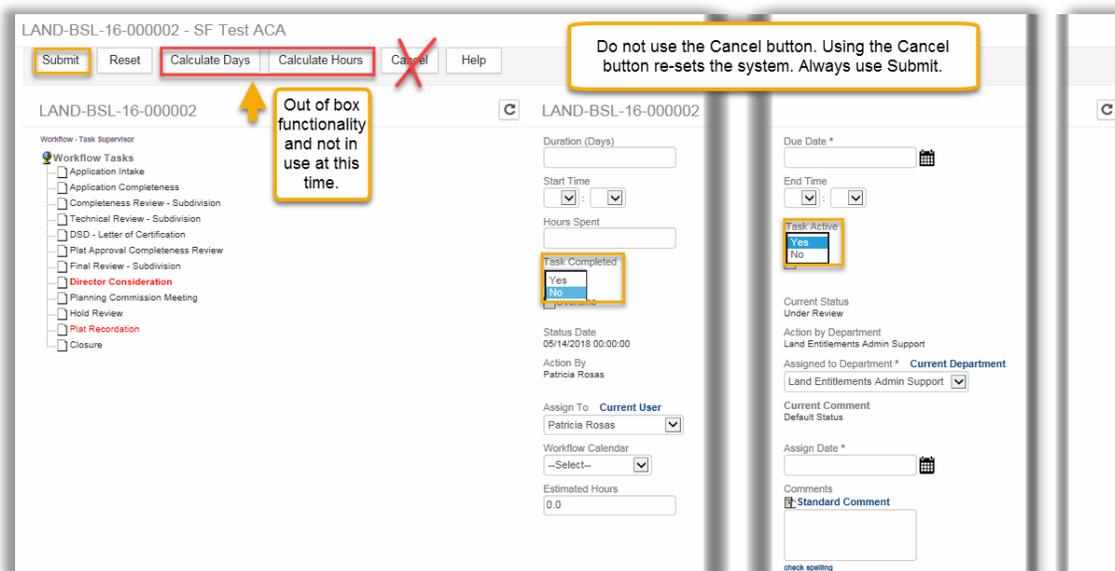
3. The Workflow Task page displays. The active task displays in red text. Click on any of the tasks listed that you want to activate or de-activate.



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

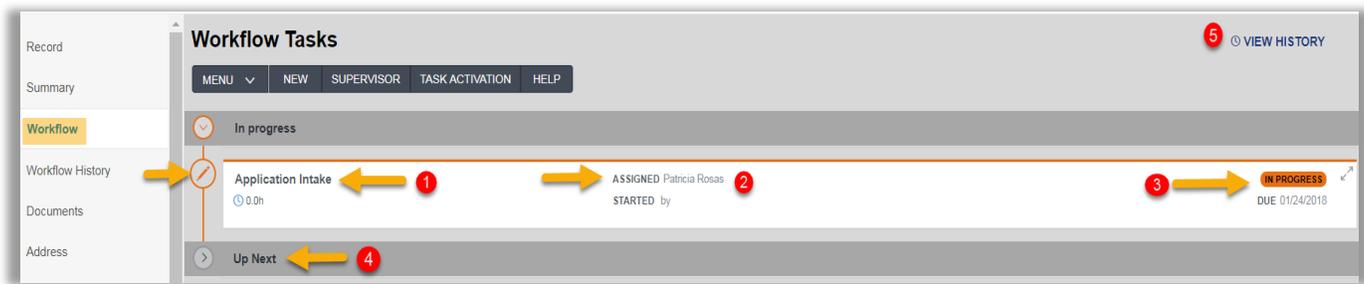
Application-specific training covers all aspects of updating tasks and workflow processes for specific record types.

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 Details page (shown).**

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

The screenshot shows the 'Task Details' page for an EDR (Encroachment Document Review) task. The page is divided into several sections: a top navigation bar with 'SUBMIT', 'ASSIGN', 'RESET', 'CALCULATE HOURS', and 'HELP'; a left sidebar with various record types; a main content area with task details and a 'Comments' section; and a bottom section for 'Task Specific Information'. Red callout boxes with numbers 1 through 10 point to specific elements: 1. EDR Review Navigation Bar; 2. Page Identification; 3. Task Assignment; 4. Due Date; 5. Current User; 6. Standard Comments for workflow; 7. Display Comment in ACA; 8. Submit/Assign Navigation bar; 9. Additional Information Required Options area; 10. New Status drop-down menu.

Record ID number is always listed at the top of the page to help end-user identify the Record when working with multiple records.

1. EDR Review Navigation Bar
2. Page Identification
3. Task Assignment
4. Due Date
5. Current User
6. Standard Comments for workflow
7. Display Comment in ACA
8. Submit/Assign Navigation bar
9. Additional Information Required Options area
10. New Status drop-down menu

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.

The screenshot displays the 'Application Intake' task details page. At the top, there is a navigation bar with 'MENU', 'NEW', 'SUPERVISOR', 'TASK ACTIVATION', and 'HELP'. Below this, the task is identified as 'Application Intake' and is assigned to Patricia Rosas. A toolbar contains buttons for 'SUBMIT', 'ASSIGN', 'RESET', 'CALCULATE HOURS', and 'HELP'. The 'SUBMIT' button is highlighted with a yellow box and a red '2'. A yellow arrow points to the 'SUBMIT' button. Below the toolbar, there are fields for 'Current Status', 'Due Date', 'Assigned Date', and 'In Possession Time (hrs)'. The 'New Status' dropdown menu is highlighted with a yellow box and a red '1', and is currently set to 'Received'. A yellow callout box with the text 'Click Submit after updating a task.' is positioned to the right of the 'New Status' dropdown. The page also shows fields for 'Action By Department', 'Current Department', 'Action By', and 'Current User'. At the bottom, there are checkboxes for 'Display Comment in ACA' and 'Display E-mail Address in ACA', along with a list of roles: 'All ACA Users', 'Record Creator', 'Licensed Professional', 'Contact', and 'Owner'.

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).

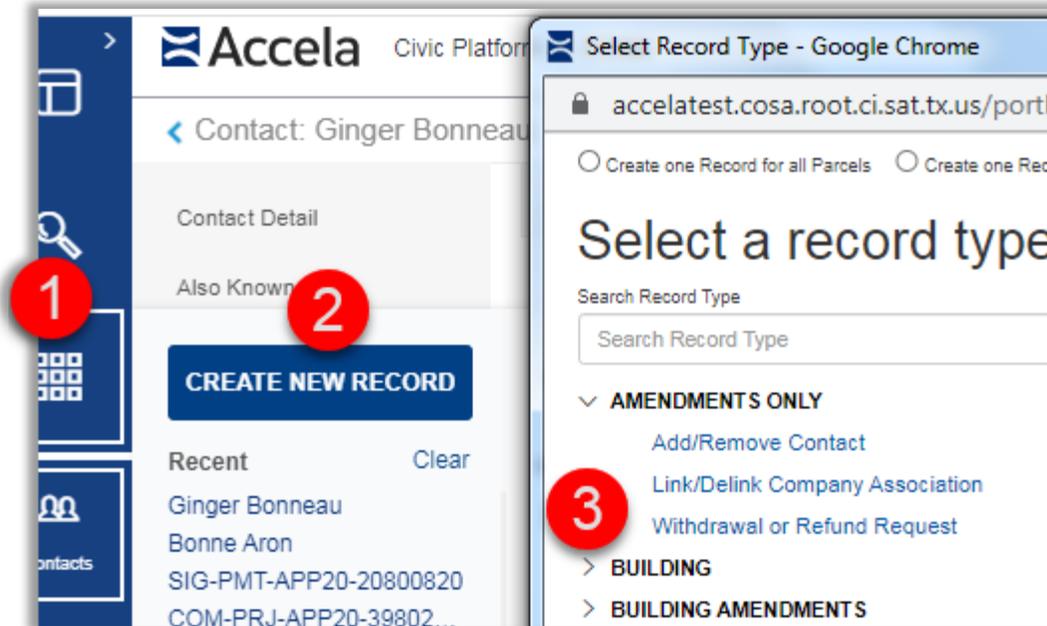
- c. If the deficiency is selected correctly, the task status and the application change to

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.**

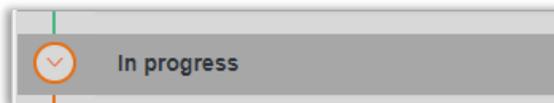
2. If status of **Completed** is selected, then after clicking Submit:
 - a. The workflow task closes.
 - b. The next task in the workflow process activates, dependent on application type.
3. If status of **Withdrawn** is selected, then after clicking Submit:
 - a. Any remaining active tasks close with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

The screenshot displays a workflow management interface. On the left is a navigation menu with options: Record, Summary, Workflow (highlighted), Workflow History, Documents, Address, Parcel, GIS, Contacts, Custom Fields, Custom Lists, Inspections, Conditions, Conditions of Approval, Fee, Assess Fee History, Payment, and Payment History. The main area shows a vertical list of tasks, each with a status icon (a circle with a slash) and a duration of 0.0h. The tasks are:

- Completeness Review - Bexar County
- Completeness Review - TCI - TIA
- Completeness Review - TCI - Storm Water
- Completeness Review - Engineering TIA
- Completeness Review - Engineering Trees
- Technical Review - CPS Energy
- Technical Review - Parks and Recreation
- Technical Review - Addressing
- Technical Review - Subdivision

 The central pane shows details for a task, including 'ASSIGNED', 'STARTED 04/23/2018 By', and 'ASSIGNED Jose Garcia'. A yellow callout box at the top of this pane states: 'Parallel Tasks may be completed at the same time.' The right-hand pane shows a summary of tasks with 'UNDER REVIEW' status and due dates:

- DUE 10/31/2016
- DUE 10/31/2016
- DUE 10/31/2016
- DUE 10/31/2016
- DUE 11/29/2016
- DUE 11/29/2016
- DUE 11/15/2016
- DUE 11/15/2016

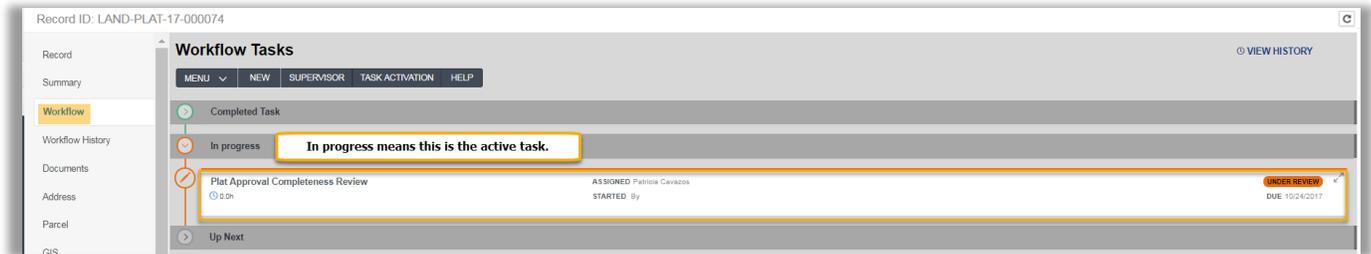
Workflow tasks are marked as follows:

- *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.

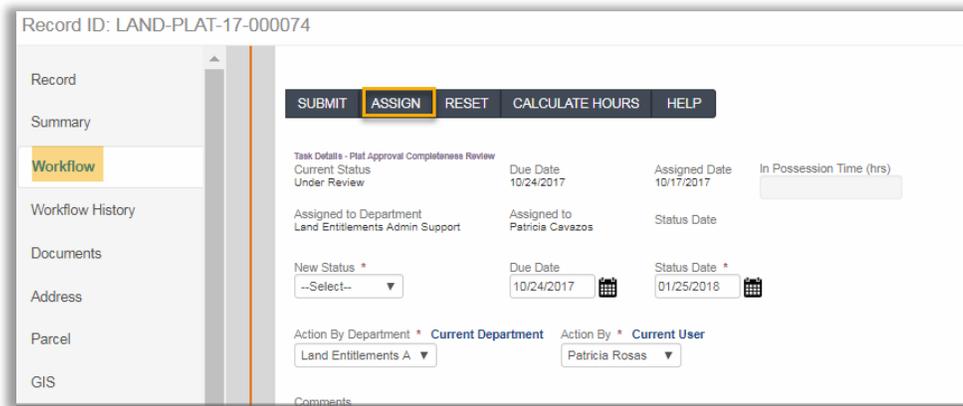
Assigning Workflow Tasks

❖ **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.**

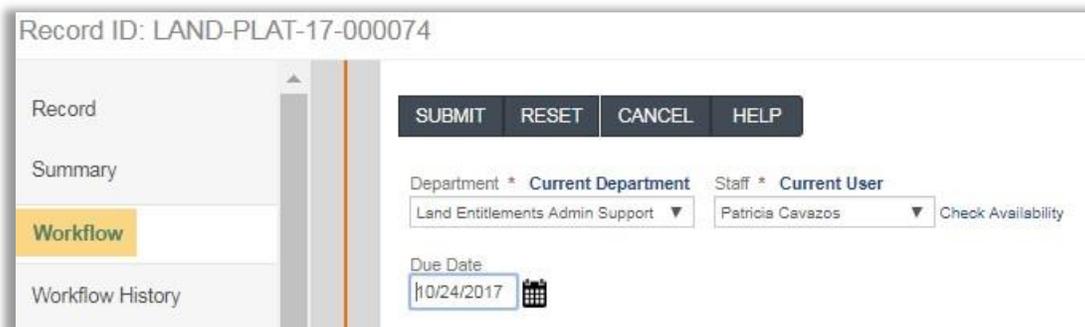
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** the Workflow Tab (shown).



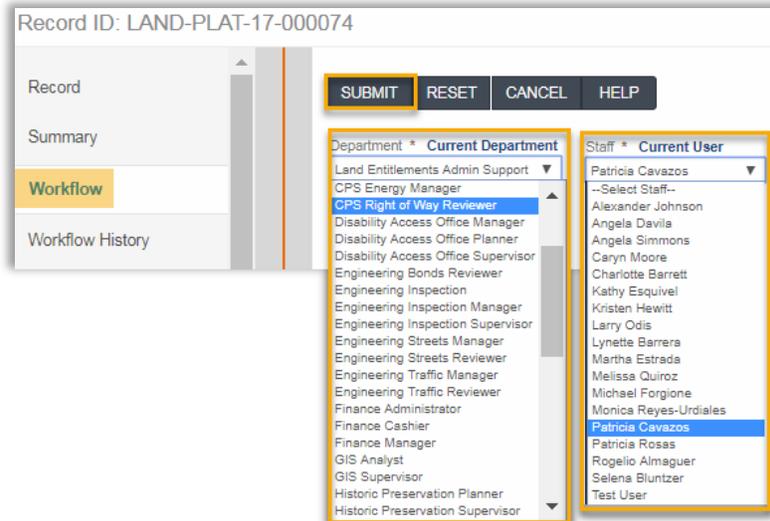
3. **Click** the Active task banner. In this example, the *Task Details-Plat Approved Completeness Review* Detail page displays (shown).



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



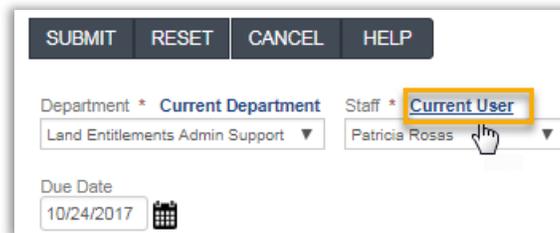
5. **Click** the *Department* drop-down menu to view the different department options. **Click** your selection (shown).
6. **Click** the *Staff* drop-down menu to view options and make selection (shown).



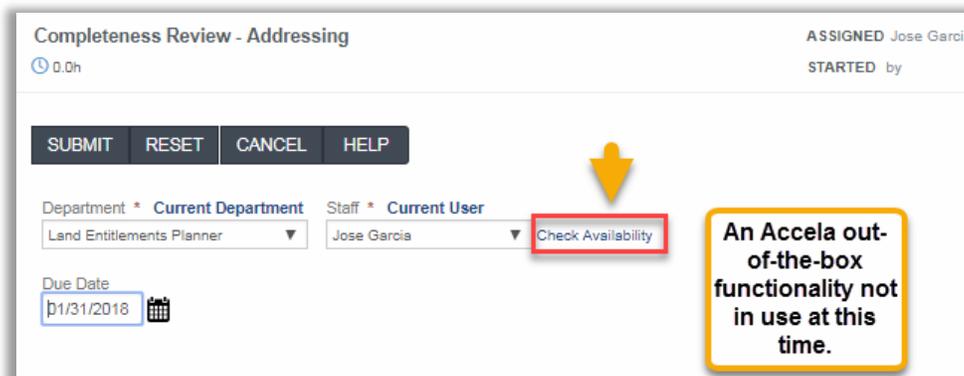
7. **Click Submit.**

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).

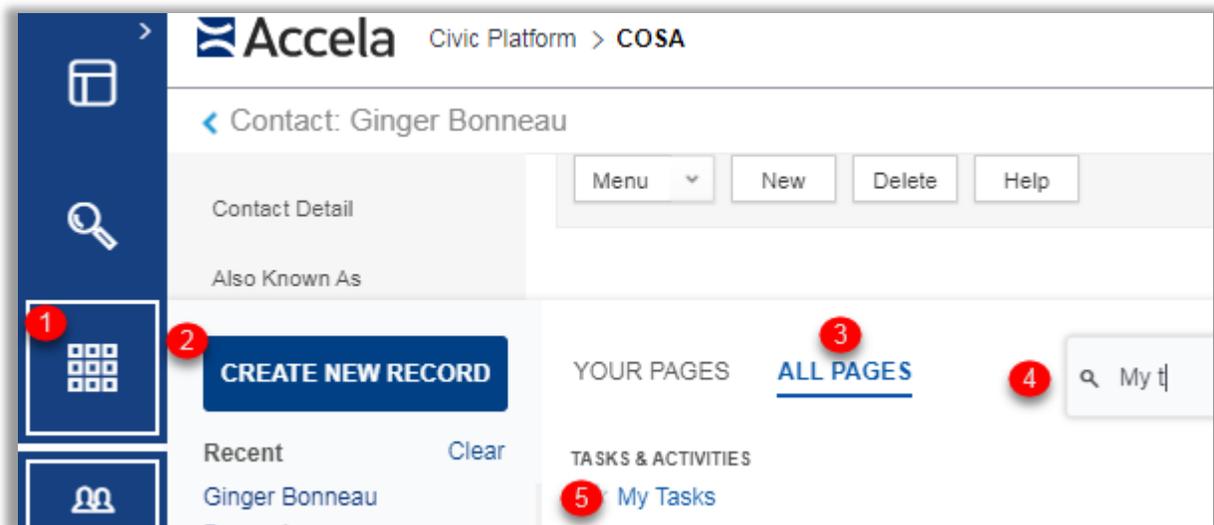
Additional Option for Assigning Tasks

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.

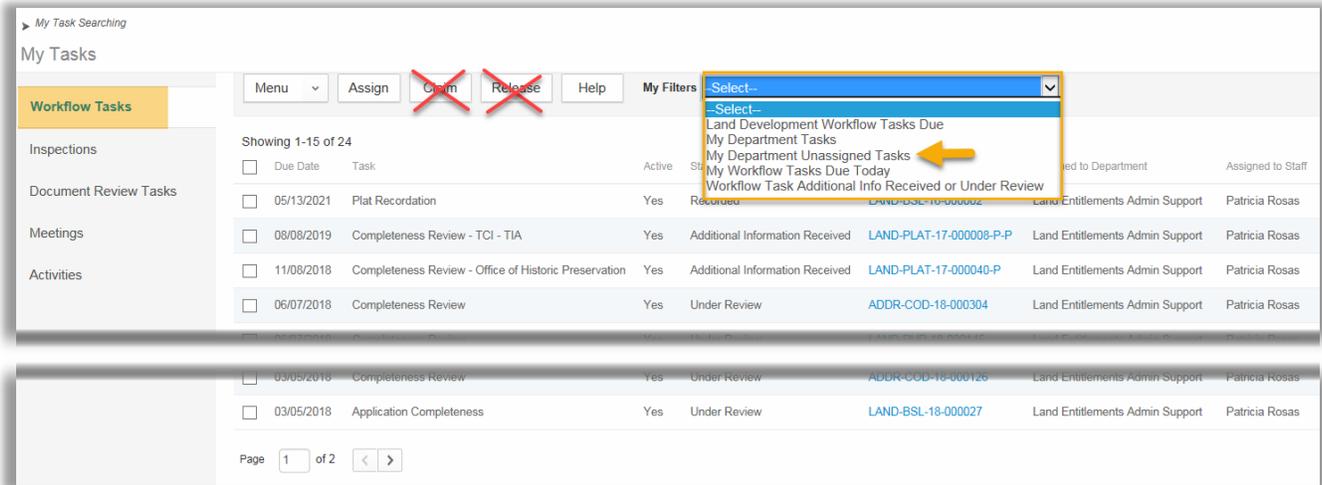
Assigning Workflow/Inspections Using My Tasks Page

- ❖ **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.**

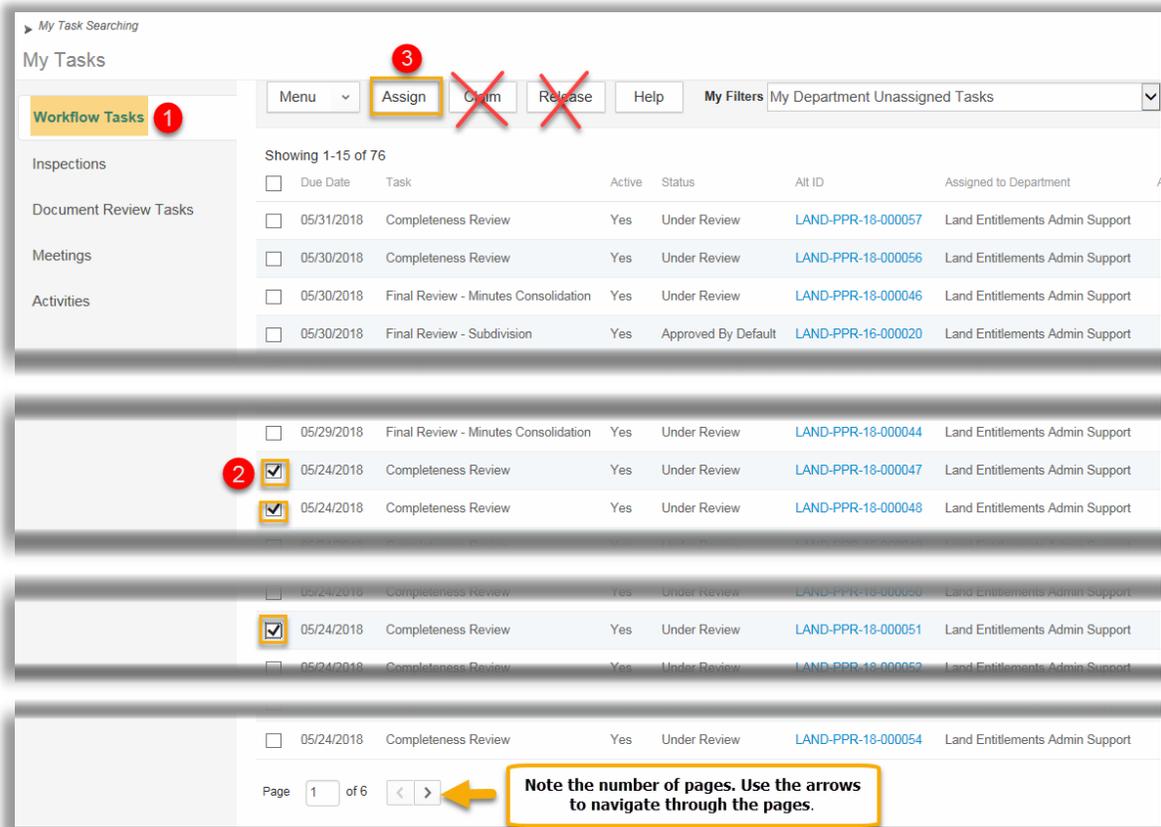
1. From the Launchpad, **click** the All Pages icon (shown).
2. **Filter** for My Tasks page (shown). **Click** the My Tasks link.



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.

My Task Searching

SUBMIT RESET HELP

Department * Current Department
--Select Department--

Staff * Current User
--Select Staff-- Check Availability

Due Date

To self-assign task(s), simply click the Current User hyperlink.

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.

My Task Searching

My Tasks

Workflow Tasks

Menu Assign Claim Release Help My Filters My Department Unassigned Tasks

1 task(s) assigned successfully.

Adding Comments to the Record

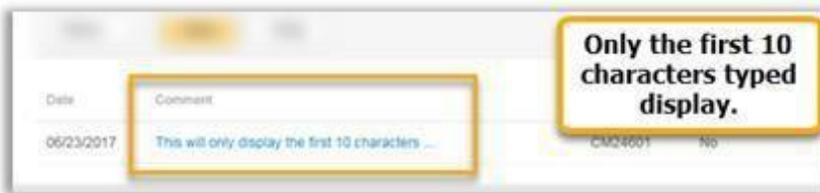
During this step in the workflow process, you can view comments typed by other reviewing staff and/or add additional comments to capture activity that occurred during a particular step in the process. Comments added to a record are **different** from comments added to a workflow task of the record. Once 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).



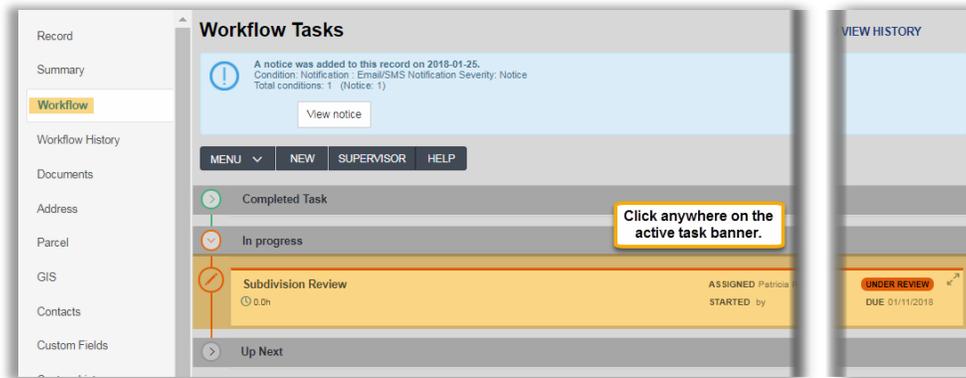
2. Click the hyperlink of the comment to view the full comment (shown).
 - a. **To view** an existing comment, **click** the Comment hyperlink.
 - b. **To edit** an existing comment, **click** the Comment hyperlink to display the Comment box with the full comment, **type** your changes. **Click Submit.**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



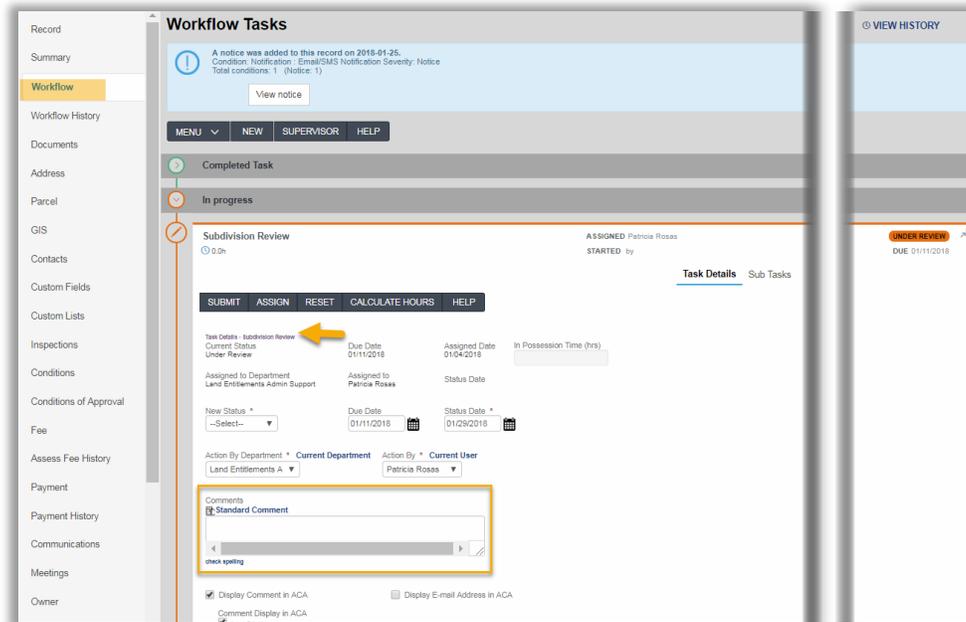
Adding Workflow Tasks Comments

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:

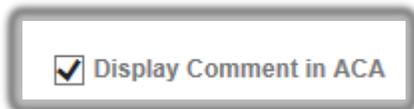
1. From the Record's navigation bar, **click** the Workflow Tab.
2. **Click** the active Task banner (shown).



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.

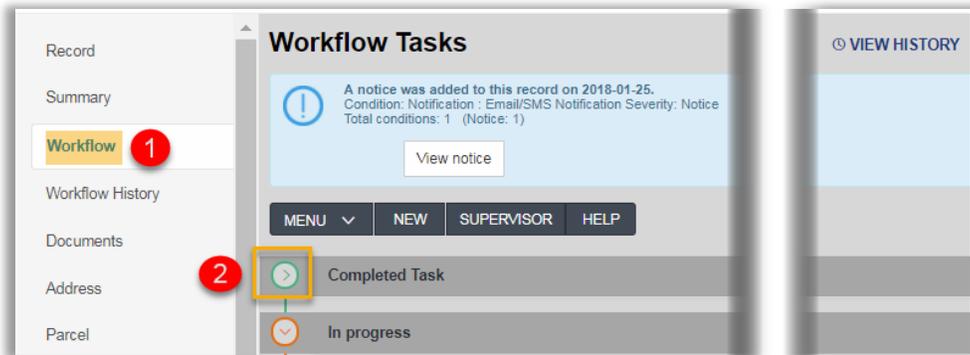
4. Click *Submit* (shown).

Viewing Workflow Tasks Comments

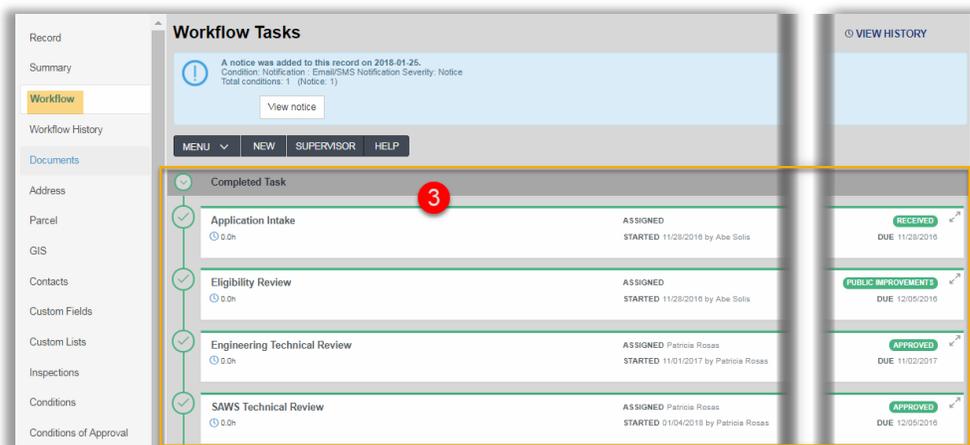
It is helpful to review comments from previously closed workflow tasks while conducting your division or agency reviews. Comments may contain information to help the user with the current task.

To view previously closed task comments

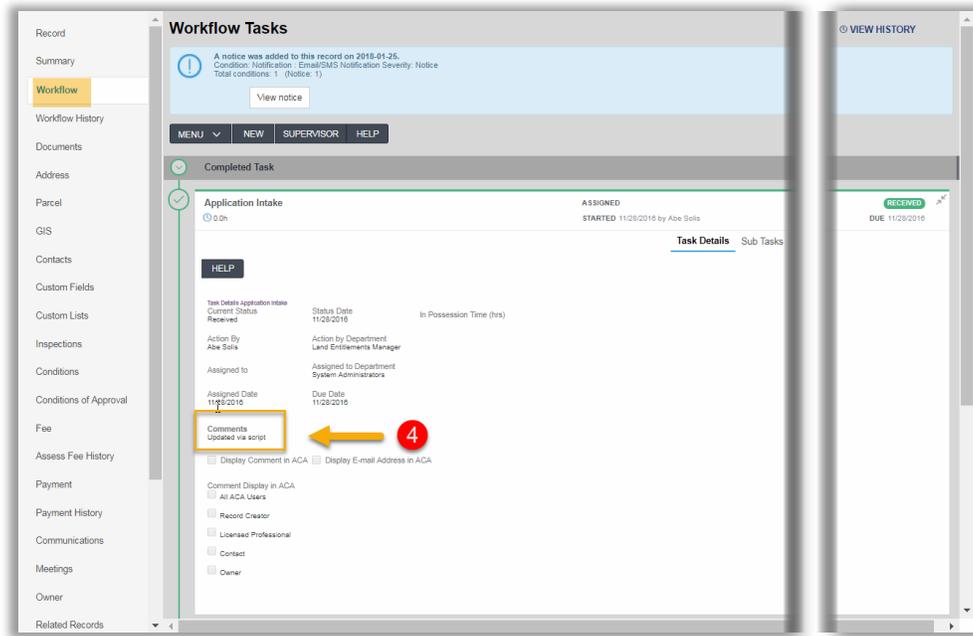
1. From the Record's navigation bar, click the Workflow Tab (#1 shown).



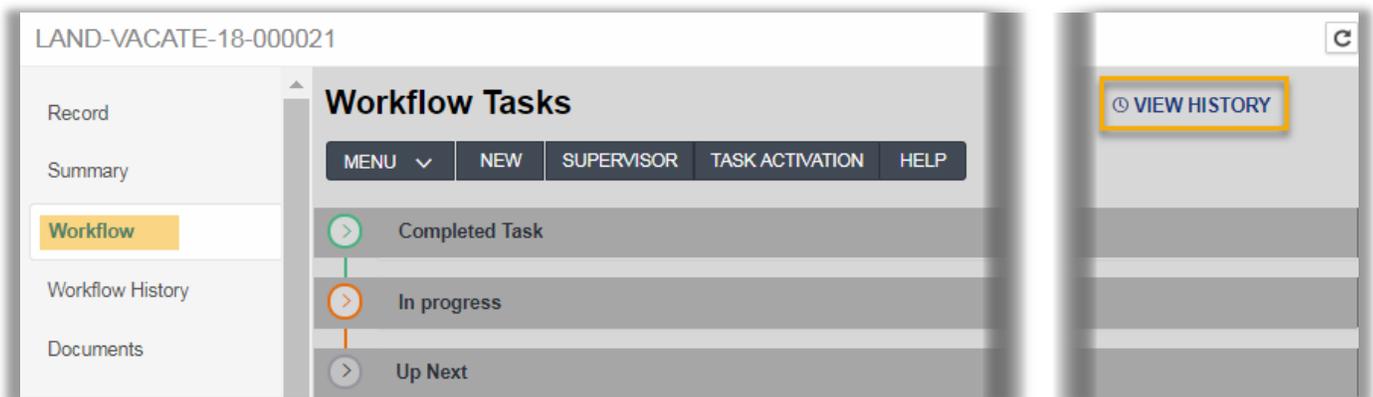
2. Click the green arrow to the left of the Completed Task (# 2 shown).
3. All completed tasks for that particular task display (# 3 shown).



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

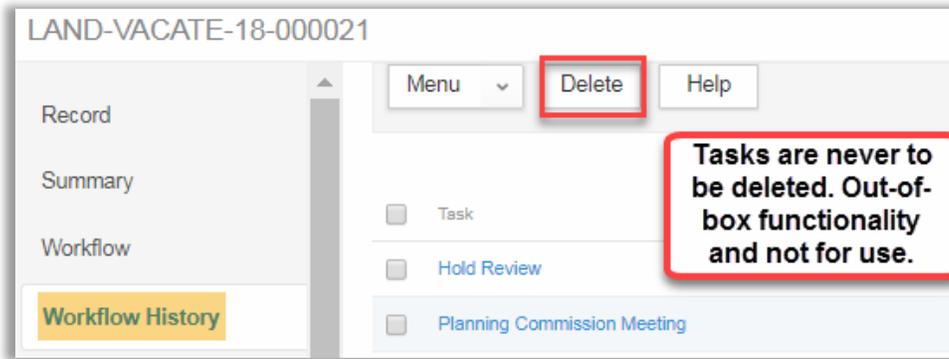


Alternative Methods to View Workflow History Comments



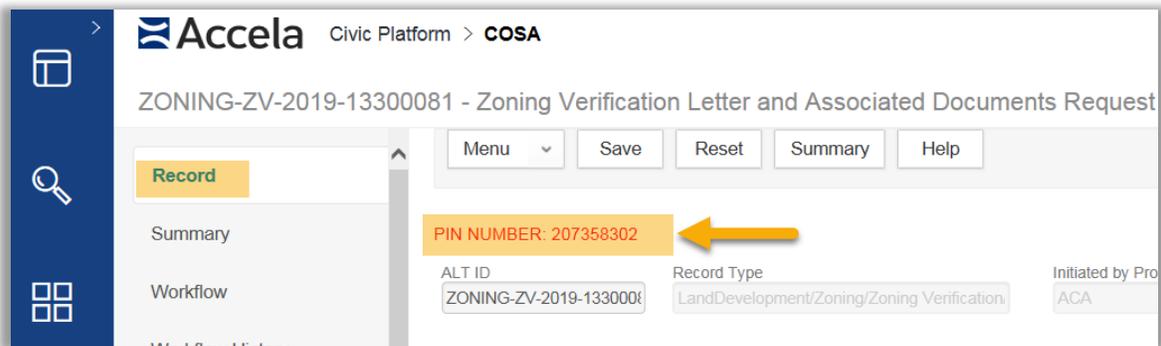
1. Click the **View History** hyperlink located on the upper right-hand side of the Workflow Tasks page (shown). Clicking the hyperlinks opens the Workflow History page displaying a list of all Record tasks.

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



PIN Numbers

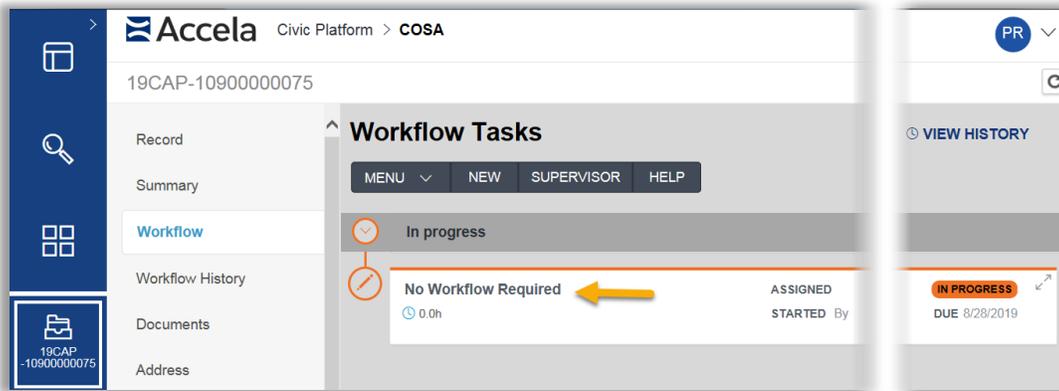
The PIN number is a system generated number for use by staff to provide to the customer, enabling him to *claim* the record in his Online Portal account (ACA or Citizen Access). Find the PIN number by using the Record Tab on the Record's navigation bar (shown). Before releasing a PIN Number to a customer, 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.

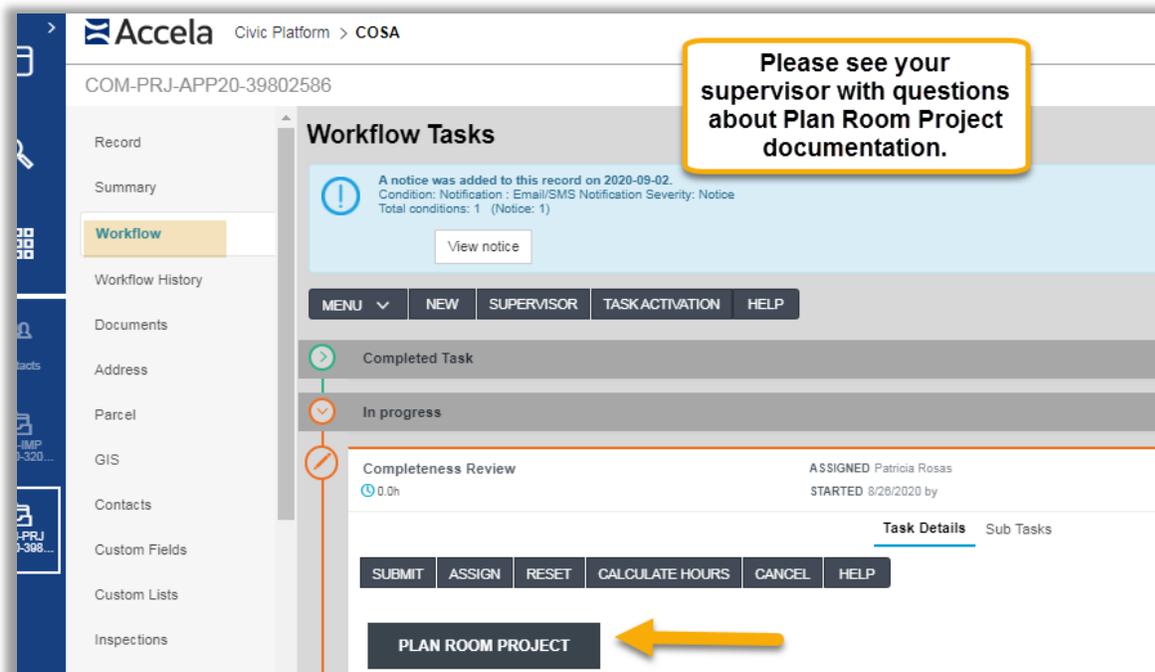
A claimed PIN number displays as a non-record with the CAP record ID number (shown). These non-records are simply a means of capturing activity within BuildSA. Note the No Workflow Required banner (shown).

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.

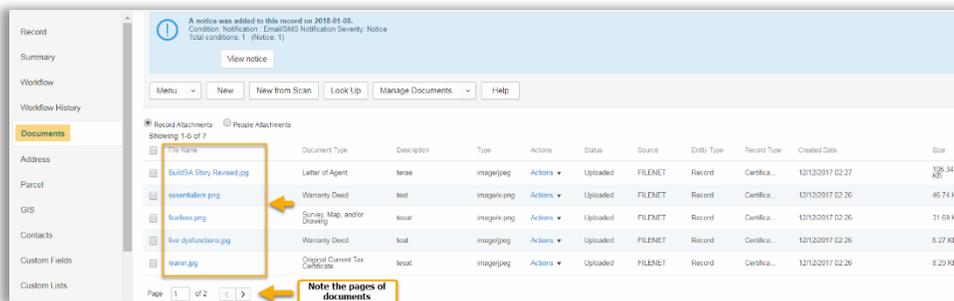
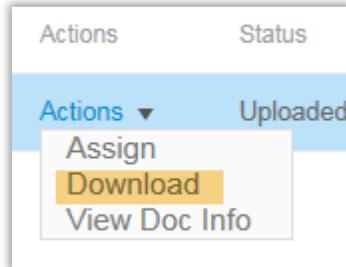


The Documents Tab of the Record's navigation bar lets you view all documentation to verify the required information, based on the type of document indicated, is received. Documentation is also uploaded to a record using the Documents Tab.

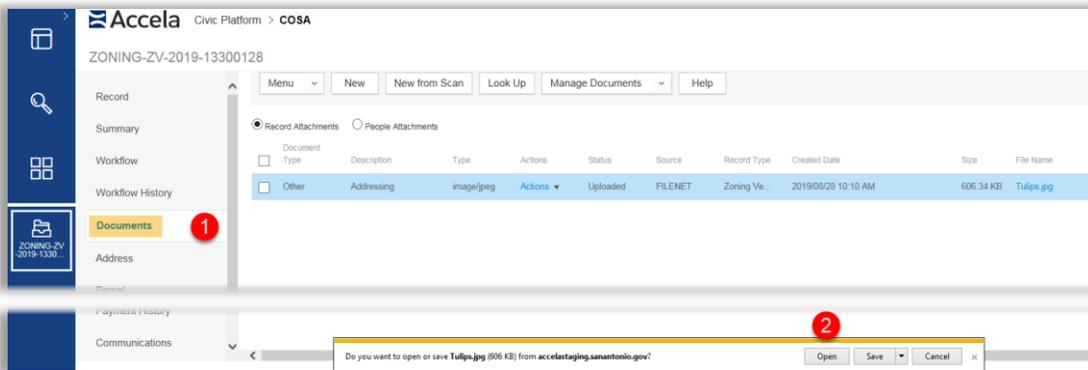
❖ **NOTE: All documents received are to be scanned, saved to a local drive and uploaded to the Record using BuildSA back-office and based on the document types above.**

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).

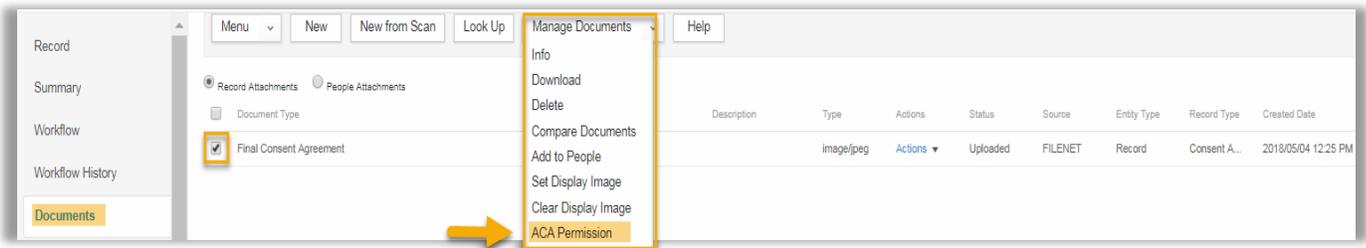
Making Documents Visible to the Applicant

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).



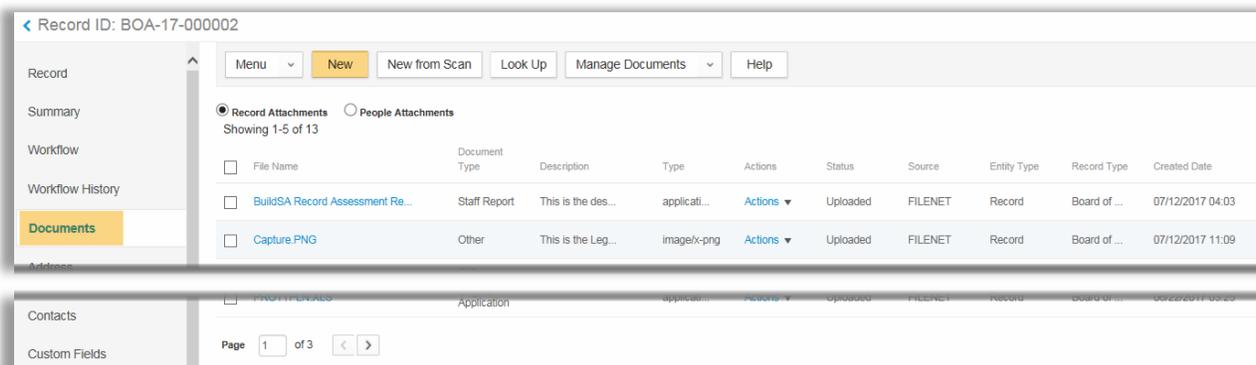
4. From the Manage Documents drop-down menu, **click** to select ACA Permission (shown).
5. The Viewable Options page displays (shown). Note options.
6. **Click** Submit.



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.)

The maximum file size allowed is 80 MB.

Source *
FILENET

Document Group/Category
BOA

Department Current Department
Land Entitlements Admin Supp

Description

check spelling

ACA Permissions [Change](#)
Follow Document Type Security

Apply Definitions to Selected

File Name * Up to 80MB Document Group/Category Department Description ACA Permissions

- ❖ **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.

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Menu

Save

Add

Delete

Cancel

Help

Source *
FILENET

Document Group/Category *
LAND_PLAT_BSL

Department Current Department
Land Entitlements Adr

Description

check spelling

ACA Permissions [Change](#)
Follow Document Type Security

Apply Definitions to Selected

File Name * Up to 80MB

Department

--Select--

Bexar Appraisal Map of 200 ft Boundary

DGN/Shape File of Plat

DSD LOC Plat

Legal Document(s)

Letter of Agent

Mailing List of Names and Addresses

Mylar

Notification List

Original Application

Other

Plat

Plat in DWG

Proof of Ownership

Public Hearing Written Notice of Intent

Staff Report

Tax certificates: City, County, School

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

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

The screenshot shows a software interface with a sidebar on the left containing menu items: Record, Summary, Workflow, Workflow History, Documents (highlighted), Address, Parcel, GIS, Contacts, Custom Fields, and Custom Lists. The main area has a top toolbar with buttons: Menu, Save, Add (highlighted), Delete, Cancel, and Help. Below the toolbar are several dropdown menus: 'Source *' set to 'FILENET', 'Document Group/Category *' set to 'LAND_PLAT_BSL', and 'Department' set to 'Current Department Land Entitlements Adr'. A large text area labeled 'Description' contains the text 'Proof of Ownership Letter' and has a 'check spelling' link below it. At the bottom, there are 'ACA Permissions' options: 'Change' and 'Follow Document Type Security'. A footer section titled 'Apply Definitions to Selected' includes a checkbox for 'File Name * Up to 80MB' and labels for 'Document Group/Category' and 'Department'.

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

The screenshot shows a 'Batch Upload' dialog box with a close button (X) in the top right corner. The text inside reads 'The maximum file size allowed is 80 MB.' Below this text is a 'Select File' button, a text input field labeled 'File(s):', and two buttons at the bottom: 'Continue' and 'Cancel'.

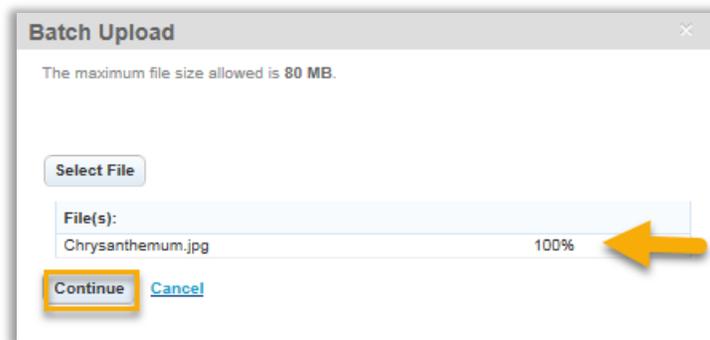
8. The *Windows Explorer* window opens (shown).



9. **Navigate** to the local drive where the document(s) are saved.

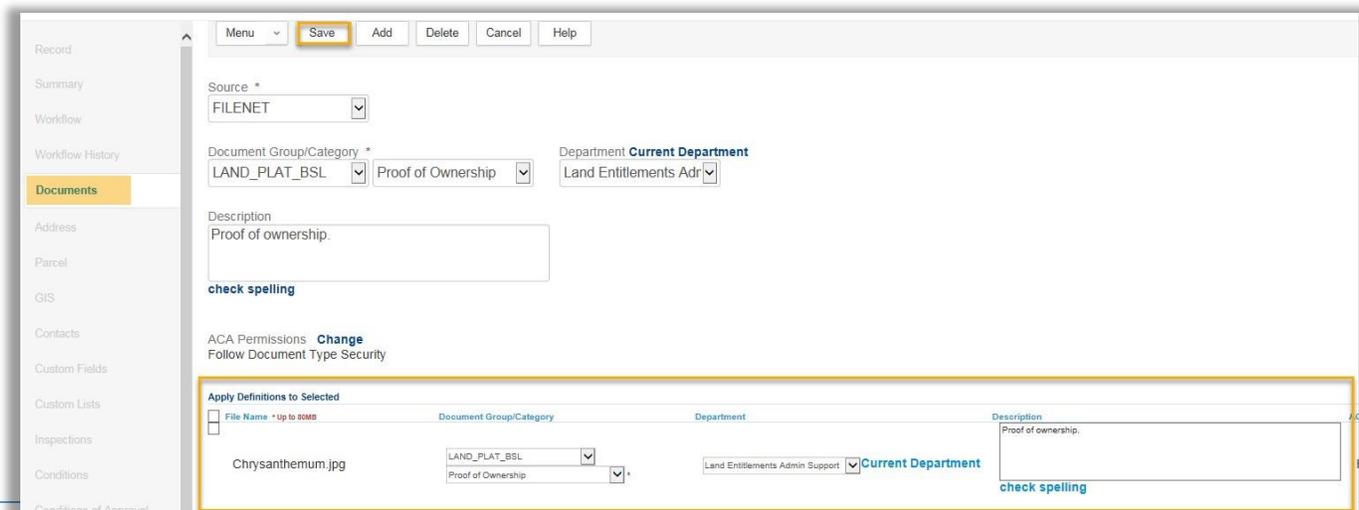
10. **Select** the file(s) to upload.

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.

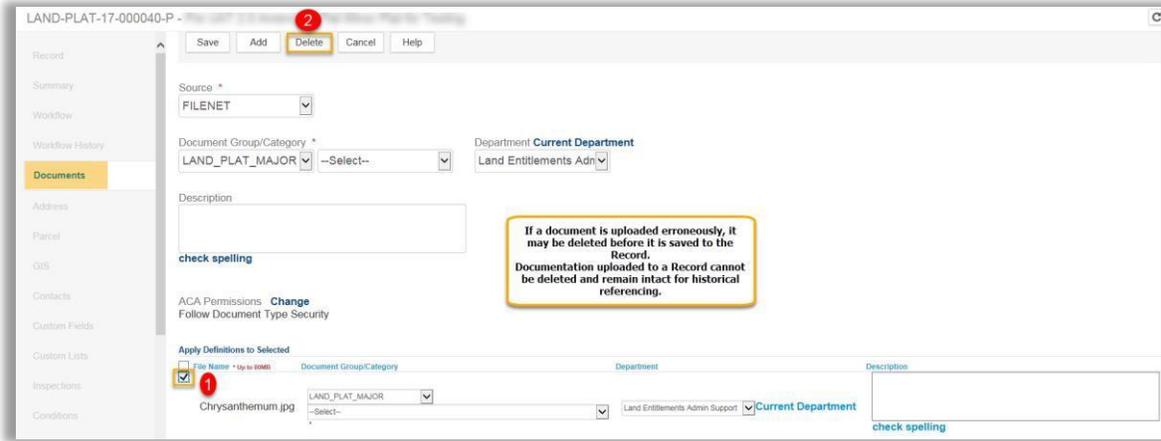
Documents are not to be deleted under any circumstances

While in the *Adding a New File* mode, if a file is uploaded (added) erroneously, it may be deleted

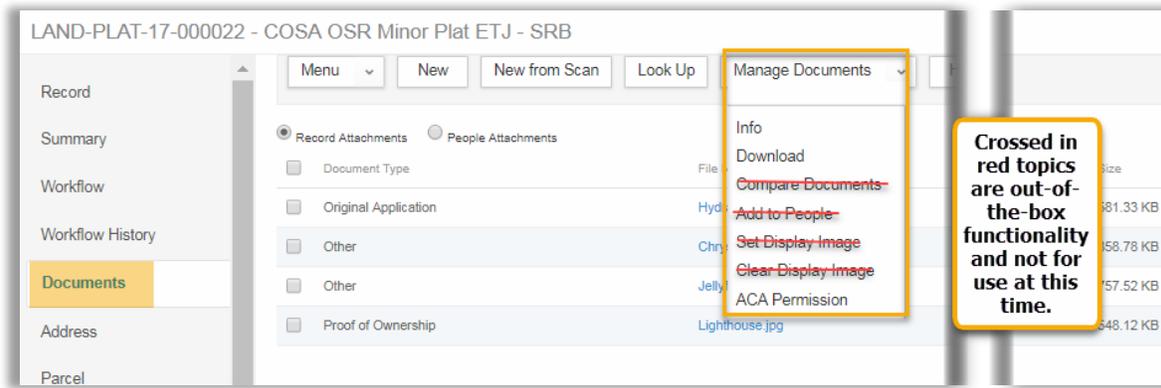
but never after the Save button is clicked. Follow the steps below:

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.

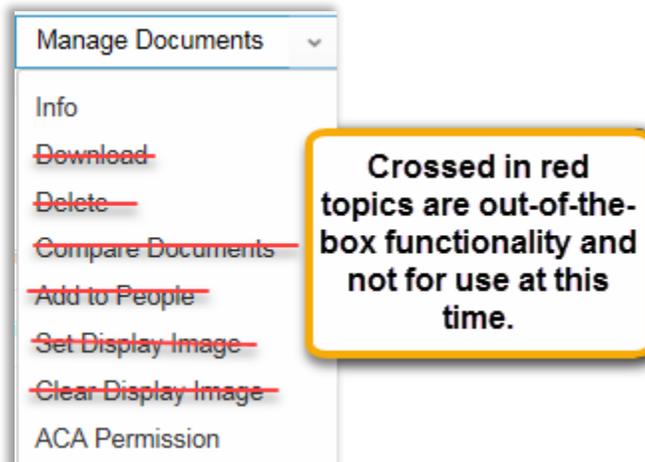
The screenshot displays a web application interface for document management. On the left is a navigation sidebar with options like Record, Summary, Workflow, and Documents (highlighted). The main area contains a form with fields for Source (FILENET), Document Group/Category (LAND_PLAT_BSL, Plat), and Department (Current Department). Below the form is a table with columns for File Name, Document Group/Category, and Department. The first row shows 'Jellyfish.jpg' with a checked checkbox and a red circle '1' next to it. The 'Delete' button in the top toolbar is highlighted with a red circle '2'.



❖ **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).

Before changing the selected default of No to Yes for options 1 and 2, prior supervisory approval is required. Deletable is never to be altered from No to Yes.

Accela Civic Platform > COSA

Submit Cancel Help

Title Viewable in ACA
Set Title Viewable Permission: Yes No

All ACA Users
 Registered ACA Users Record Creator Licensed Professional

Downloadable in ACA
Set Downloadable Permission: Yes No

All ACA Users
 Registered ACA Users Record Creator Licensed Professional Contact Owner

Deletable in ACA
Set Deletable Permission: Yes No

All ACA Users
 Registered ACA Users Record Creator Licensed Professional Contact Owner

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.

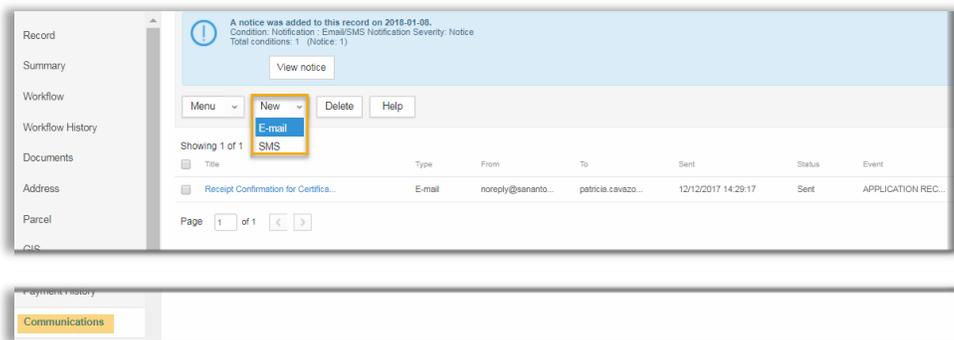
System Generated Emails

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).



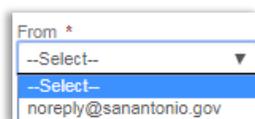
3. **Click** the *New* button drop-down menu (shown).
4. **Click** to select *Email*. COSA is not using the Short Message Service (SMS) option at this time.
5. The Communication Detail page displays (shown).

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

The screenshot shows the 'Communication Detail' form with the following fields and controls:

- Buttons:** Send, Reset, Attach, Cancel, Help
- From ***: A required dropdown menu currently showing "--Select--".
- Importance:** A dropdown menu currently set to "Normal".
- Designated Send Date:** A date selection field with a calendar icon.
- Time:** Two dropdown menus for hours and minutes, both currently set to "00".
- To, Cc, Bcc:** Text input fields for recipient addresses, each with a small icon to the right.
- Title:** A text input field for the email subject.
- Attachment(s):** A section for adding attachments.
- Content *:** A required rich text editor with a toolbar showing options for font (Arial), size (1 (8 pt)), bold, italic, underline, bulleted list, numbered list, link, unlink, image, and other formatting options.
- Comments:** A text input field with a "check spelling" link below it.

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).

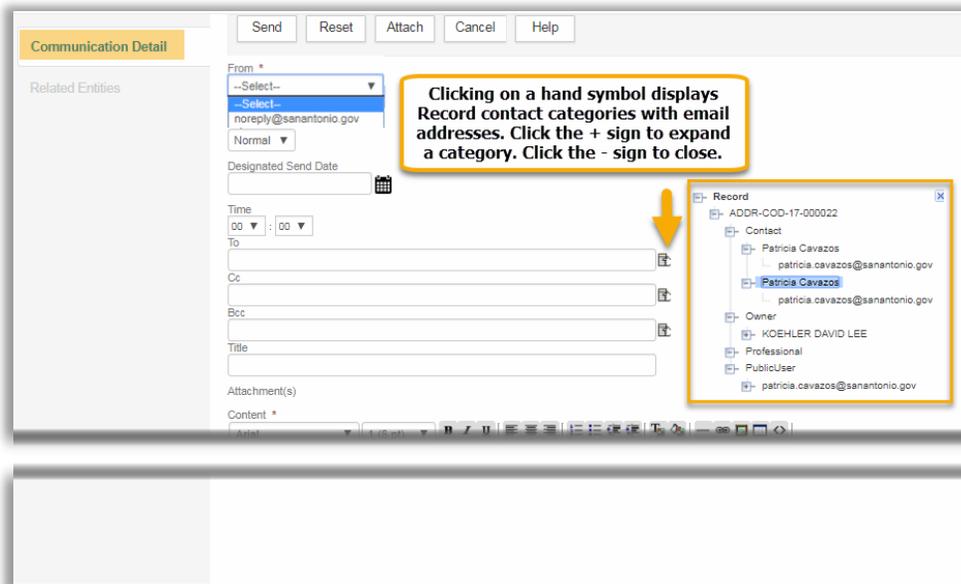


8. **Select** the level of *Importance* of the email by **clicking** on the *Importance* drop-down menu, as applicable (shown). This is not a required field.

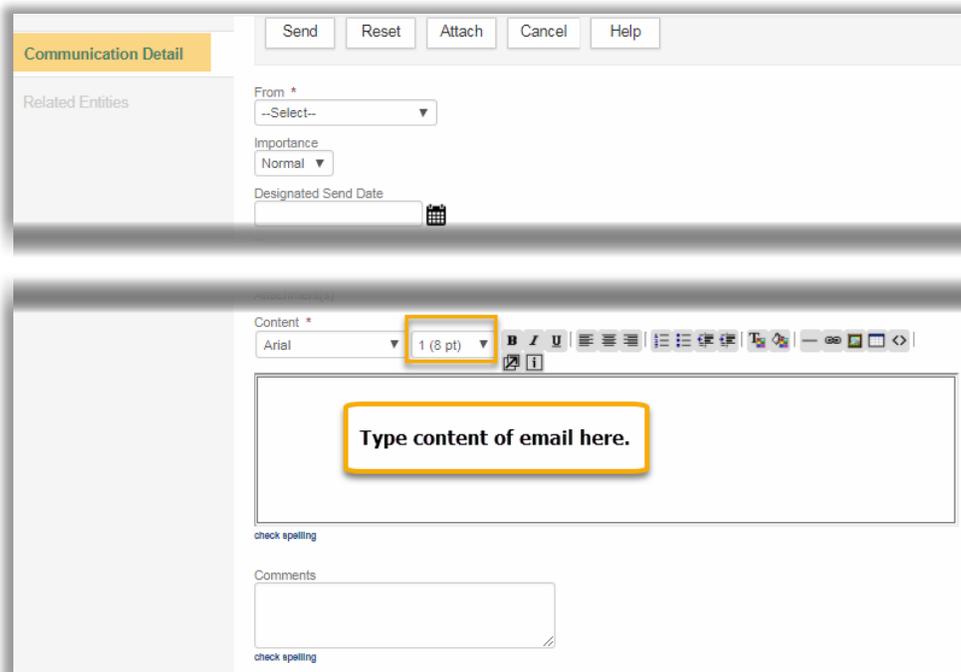


9. **Use** the *Calendar* icon to select a date for the *Designated Send Date* field.
10. **Select** a *Time* for your email, as applicable, from the *Time* field drop-down menu (shown).

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

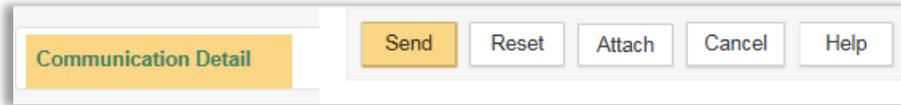


12. **Type** or select the email address of any copies and/or blind copies recipients.
13. **Type** the subject of the email in the *Title* field. This is an **important** step for easy identification of emails as the Record progresses.
14. **Attach** documentation, as applicable (steps for attaching 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).



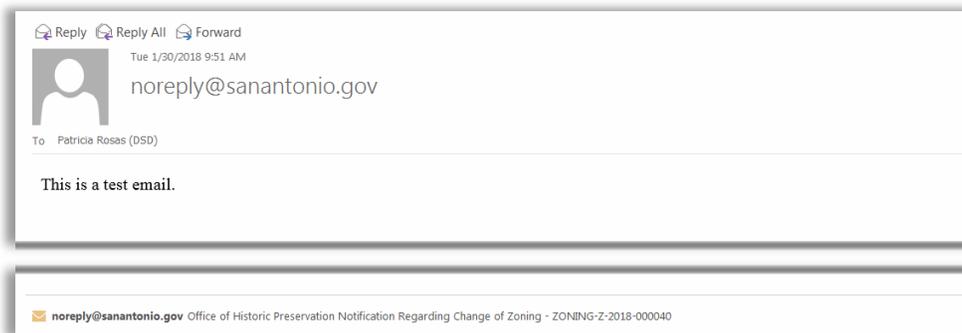
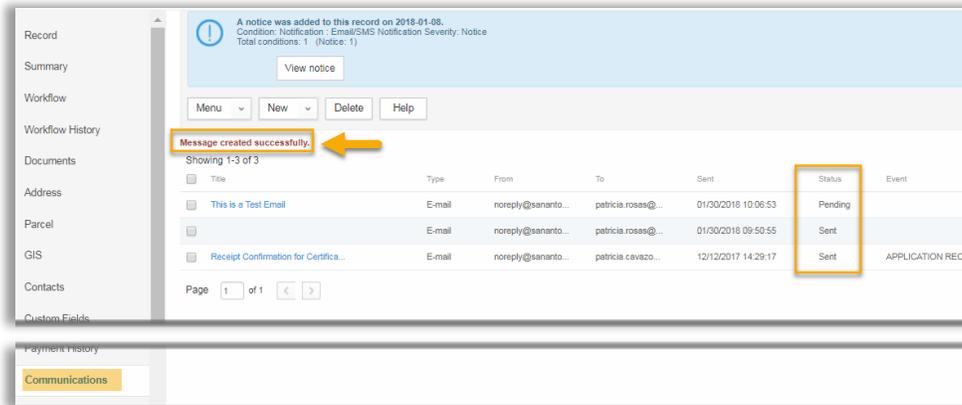
16. The Comments typed in the Comments box on this page are not visible to the customer and do not display in BuildSA. This is an out-of-the-box functionality and not required.

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



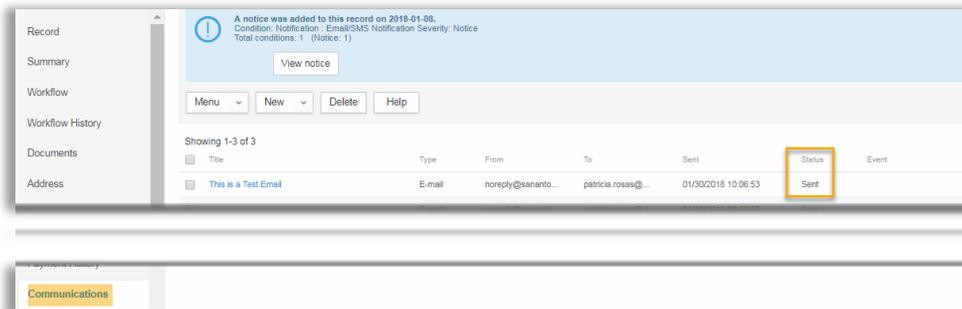
18. The email is sent to customer (shown). Notice the Status column lists the status of the email as Pending. BuildSA displays the message *Message created successfully* (shown). Click the refresh

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).

Record ID: LAND-MDP-17-000003

Menu New Delete Help

All communications are listed here. Click on the blue text hyperlink to open and view.

Showing 1 of 1

<input type="checkbox"/>	Title	Type	From	To	Sent	Status	Event
<input type="checkbox"/>	Receipt Confirmation for Master De...	E-mail	noreply@sananto...	Michael.Forgion...	07/03/2017 15:05:58	Sent	APPLICATION REC...

Page 1 of 1 < >

Payment History

Communications

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

Record ID: LAND-MDP-17-000003

Communication Detail Forward Cancel Help

Related Entities

Importance: Normal
From: noreply@sanantonio.gov [noreply@sanantonio.gov]
Sent: 07/03/2017 15:05:58
To: Michael.Forgione@sanantonio.gov
Cc: [Redacted]
Bcc: [Redacted]

Title: Receipt Confirmation for Master Development Plan (MDP) - LAND-MDP-17-000003
Attachment(s): [Redacted]
Content: Greetings,
This email confirms that the City of San Antonio has received your application for Master Development Plan (MDP) - LAND-MDP-17-000003.
For your convenience, you may track the progress of your application on-line at <https://acctest.sanantonio.gov/Test/CitizenAccess/ur/routing.ashx?type=1000&Module=LandDevelopment&capID1=17CAP&capID2=000003&capID3=00091&agencyCode=COSA>.
Thank you for your business.
Sincerely,
Development Services Department
Partnering with our community to build and maintain a safer San Antonio.
Please take a moment and tell us how we are doing by taking our survey.
Comments: [Redacted]

Event: APPLICATION RECEIVED
Status: Sent

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

Record ID: LAND-MDP-17-000003

Communication Detail Forward Cancel Help

Related Entities

Importance
Normal
From
noreply@sanantonio.gov [noreply@sanantonio.gov]
Sent
07/03/2017 15:05:58
To

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.

Communication Detail Send Reset Attach Cancel Help

Related Entities

From *
noreply@sanantonio.gov

Importance
Normal

Designated Send Date

Time
00:00

To

Cc

Bcc

Title
Receipt Confirmation for Master Development Plan (MDP) - LAND-MDP-17-000003

Attachment(s)
The maximum file size allowed is 80 MB.

Content *

Arial 1 (8 pt)

Greetings,
This email confirms that the City of San Antonio has received your application for Master Development Plan (MDP) - LAND-MDP-17-000003.
For your convenience, you may track the progress of your application on-line at
<https://acatest.sanantonio.gov/TestCitizenAccess/urtrouting.ashx?type=1000&Module=LandDevelopment&capID1=17CAP&capID2=00000&capID3=00091&agencyCode=COSA>.
Thank you for your business.

check spelling

Comments

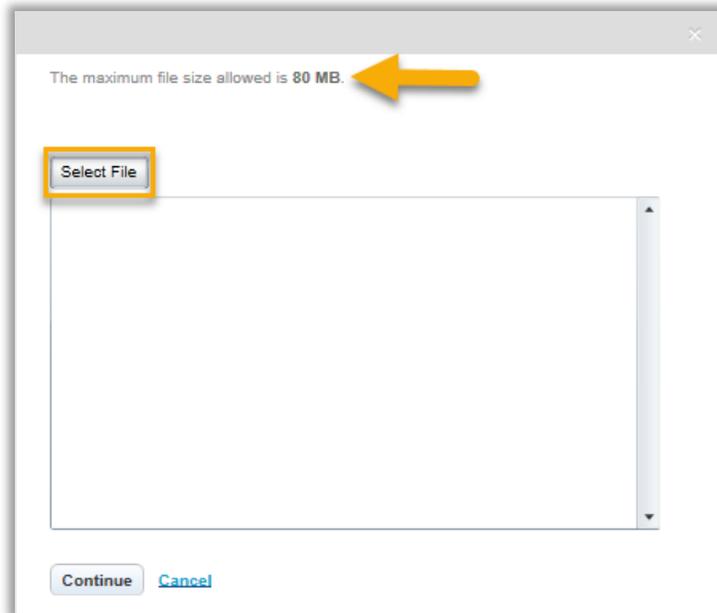
check spelling

Clicking on the hand symbols displays email contact information. Click the + sign to expand the category.

LAND-MDP-17-000003
Contact
Michael A Forgione
Michael Forgione@sanantonio.gov
Michael Forgione
diep.io@a.com
aaa sss ddd
asd@sgsgff.as
Owner
SERRANO ANGEL & MARIA
Professional
PublicUser
michael.forgione
Michael Forgione@sanantonio.gov

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

Send Reset **Attach** Cancel Help

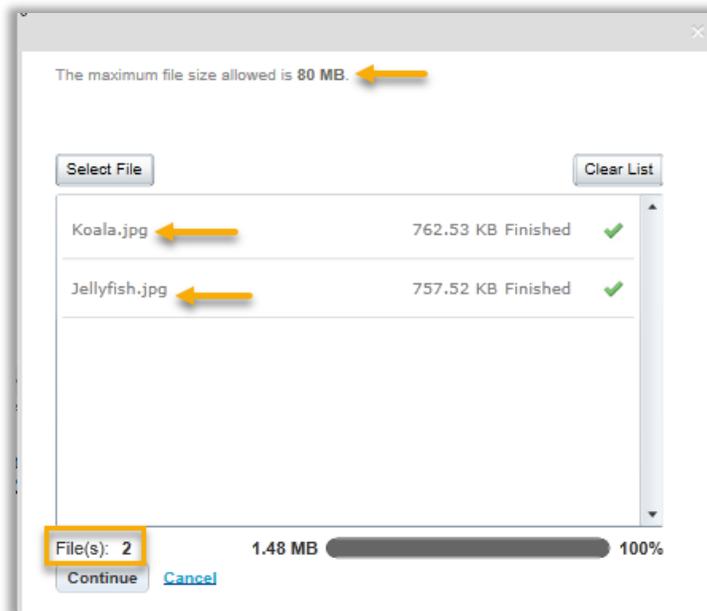


9. The *Windows Explorer* window displays (shown).

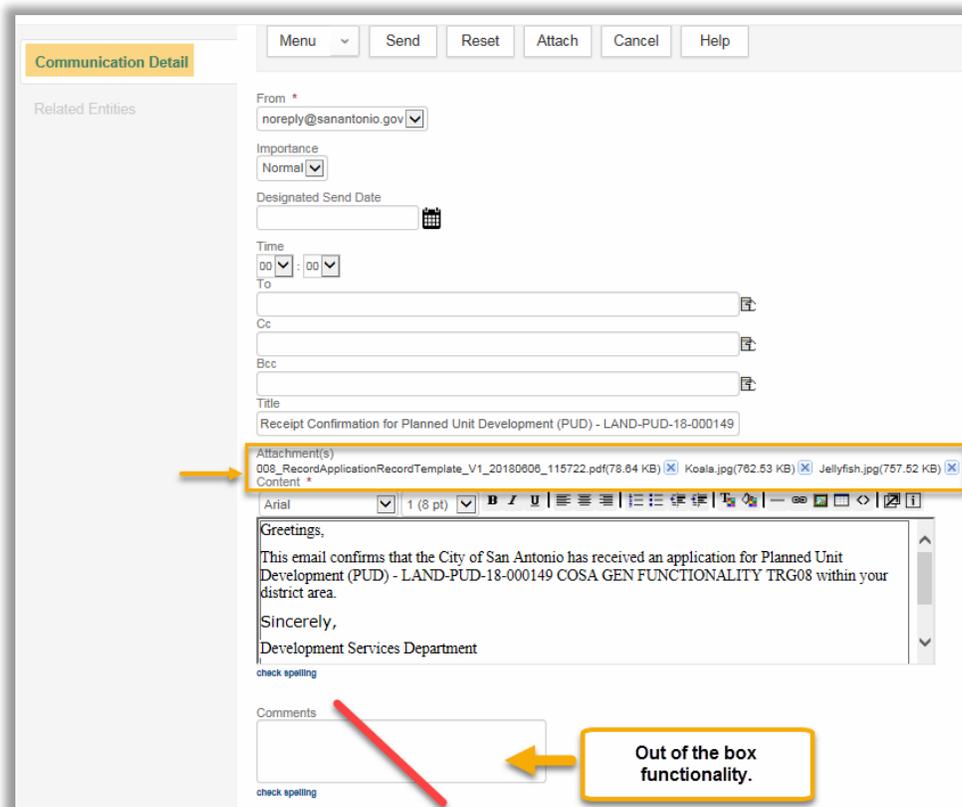


10. **Locate** the file(s) you want to attach to the email.

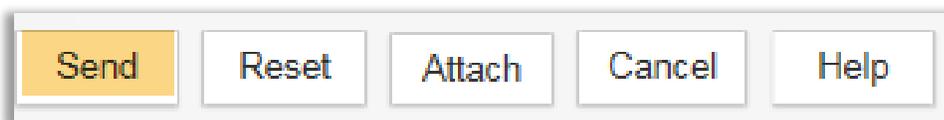
- **Select** the file by double-clicking on the file itself; or, select the file and then click on the *Open* button (shown above).
- **Verify** the file is attached to your email.



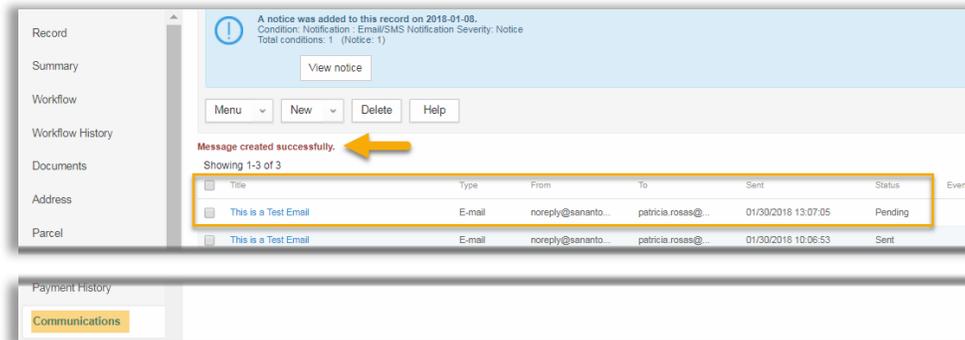
11. Click Continue. Verify the Attachments uploaded (shown).



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

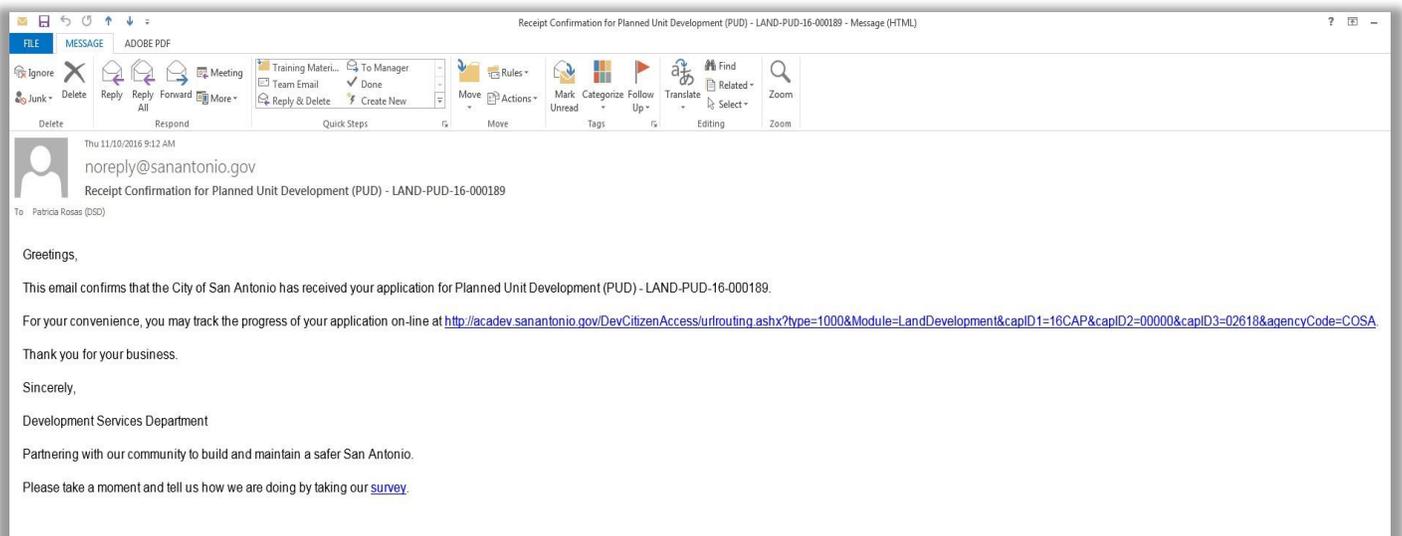
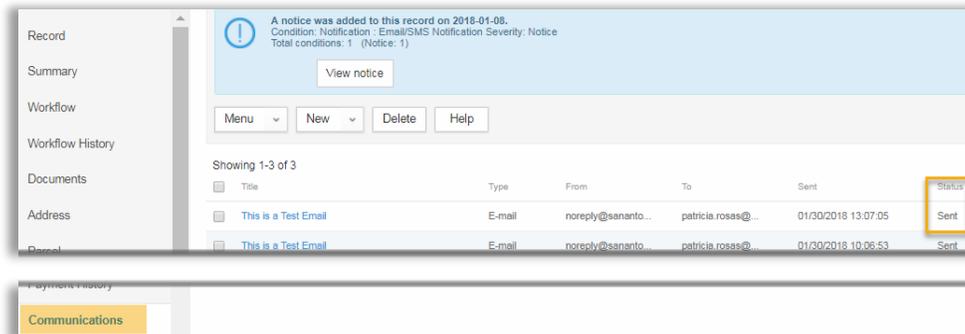


11. BuildSA generates a *Message created successfully* prompt after sending your email (shown). Notice the Status Column lists the status of the email as *Pending* (shown).



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

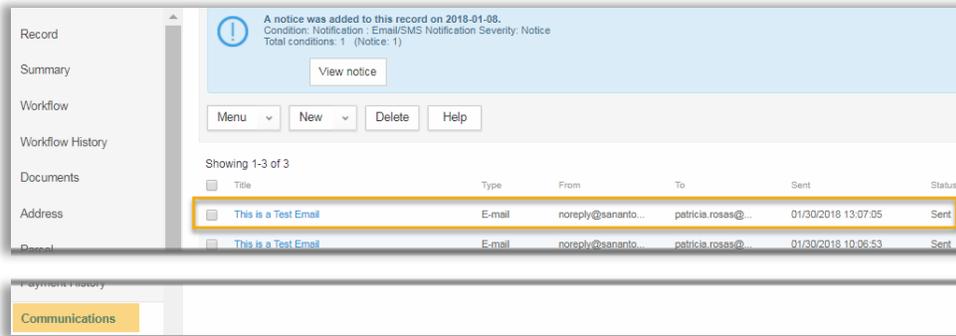
13. After clicking the refresh button, the status of the email changes to *Sent* (shown).



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.



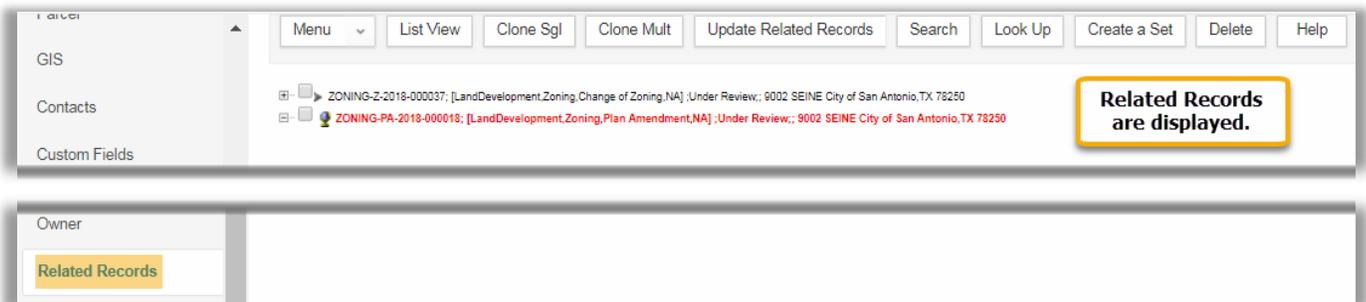
Related Records

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**.

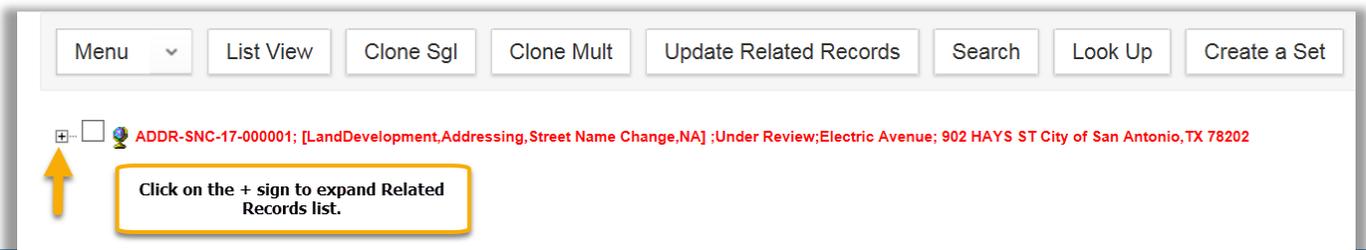
- ❖ **IMPORTANT: Relating Records (parent/child, child/parent) may impact the workflow process of a record. If you have questions about the related records process for a specific record type, please contact your supervisor.**

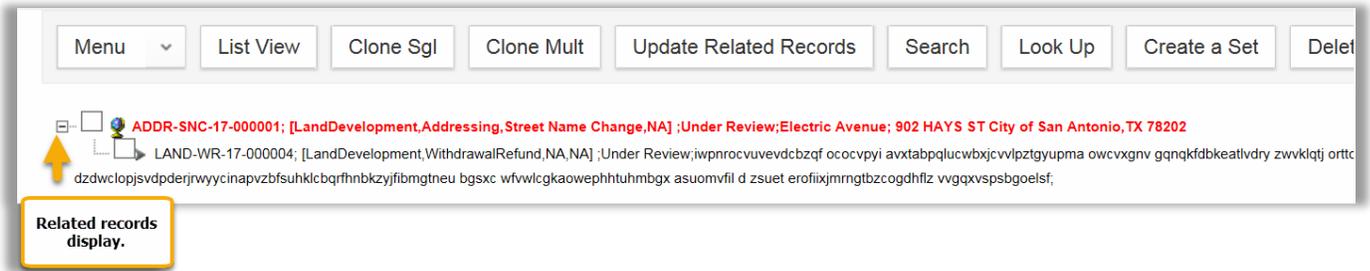
Transactional Record View of Related Records

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.





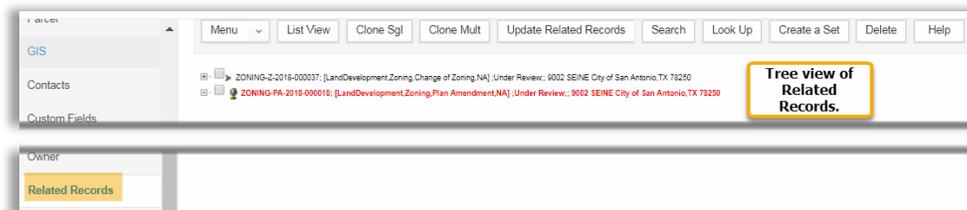
Example of expanded list

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.



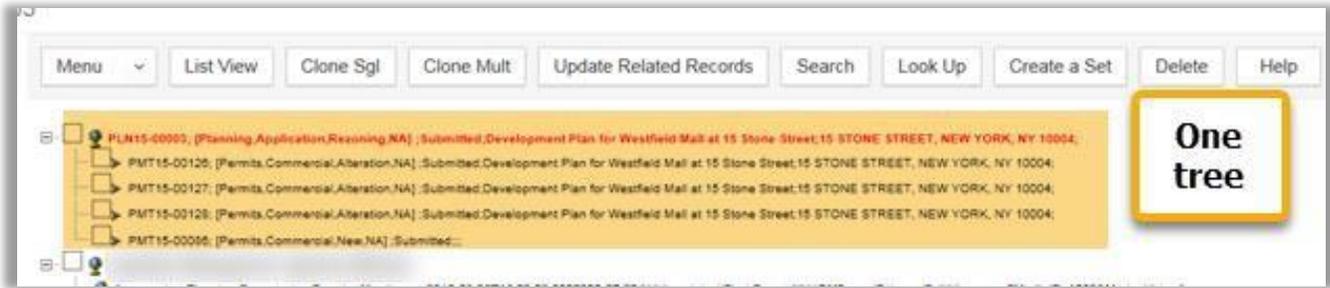
Tree View

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.

3rd	License Solution	License Gender	License P.O. Box	License Business Name 2	License Birth Date	License Country/Region	Scheduled Date	Undistributed Cost	Record Hierarchy	Application Name	Relationship	Level Prefix	Level # (start)	Level # (end)	House # Alpha (start)	House # Alpha (end)	Generated by Cloning	Pending Validation
								0	ZONING-Z-2018-000037		Parent						No	No
								0	ZONING-PA-2016-000016		Current						No	No

Owner

Related Records

Comments

Activities

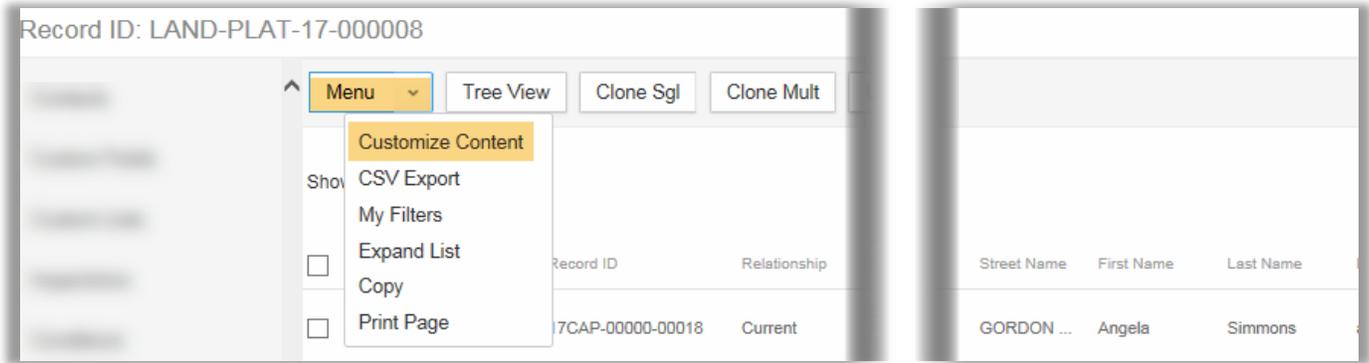
Consolidated Record Activities

Scroll to the farthest right to view Relationship Status column.

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).

Save Reset Cancel Help

Available Fields Selected Fields

Number of Records

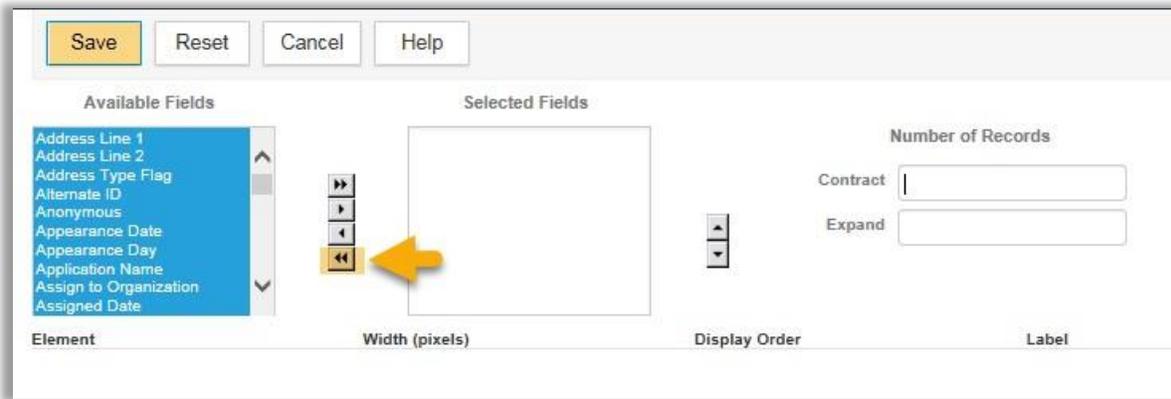
Contract

Expand

Element	Width (pixels)	Display Order	Label
Percent Complete	<input type="text" value="150"/>	<input type="text" value="1"/>	<input type="text"/>
Record ID	<input type="text" value="150"/>	<input type="text" value="2"/>	<input type="text"/>
Relationship	<input type="text" value="100"/>	<input type="text" value="3"/>	<input type="text"/>
Application Name	<input type="text" value="100"/>	<input type="text" value="4"/>	<input type="text"/>
Short Notes	<input type="text" value="100"/>	<input type="text" value="5"/>	<input type="text"/>
Record Type	<input type="text" value="120"/>	<input type="text" value="6"/>	<input type="text"/>
Record Type Alias	<input type="text" value="100"/>	<input type="text" value="7"/>	<input type="text"/>
Status	<input type="text" value="80"/>	<input type="text" value="8"/>	<input type="text"/>
Opened Date	<input type="text" value="80"/>	<input type="text" value="9"/>	<input type="text"/>
Assigned Date	<input type="text" value="140"/>	<input type="text" value="21"/>	<input type="text"/>
Closed Date	<input type="text" value="100"/>	<input type="text" value="22"/>	<input type="text"/>
Start Fraction	<input type="text" value="120"/>	<input type="text" value="23"/>	<input type="text"/>
Alternate ID	<input type="text" value="150"/>	<input type="text" value="24"/>	<input type="text"/>
Assigned to Department	<input type="text" value="100"/>	<input type="text" value="25"/>	<input type="text"/>
County	<input type="text" value="80"/>	<input type="text" value="26"/>	<input type="text"/>
Country/Region	<input type="text" value="80"/>	<input type="text" value="27"/>	<input type="text"/>

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).

The screenshot shows a list view with the following table:

Record ID	Short Notes	Record Type	Status	Opened Date	Priority	Street Name	First Name	Last Name	E-mail	Street Suffix (Direction)
17CAP-00000-00018	Major Pla...	LandDevelopment/Land Entitlement/Plat/Major	Denied	01/31/2017		GORDON ...	Angela	Simmons	ange...	
17CAP-00000-00023	test	LandDevelopment/Add Remove Contact/NA/NA	Under Review	02/28/2017		GROSS LANE	Patricia	Cavazos	patr...	
17CAP-00000-00080		LandDevelopment/Add Remove Contact/NA/NA	Completed	06/21/2017		HAYS	Michael	Forgione		

Page 1 of 1

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).

Record

Menu Search New Create By Form Create From Model GIS Create a Set View Log Help My Filters --Select--

Showing 1-5 of 50+

First Name	ID	Record Type	Project Name	Status	Organization Name	Last Name	Opened Date	Created By	Description	Balance	Expiration Date	Related Records
	LAND-CONTACT-12019	Contact Information					08/26/2020	147357		\$0.00		View
	LAND-CONTACT-12320	Contact Information					08/26/2020	139610		\$0.00		View
	LAND-CONTACT-13899	Contact Information					08/26/2020	139610		\$0.00		View
	LAND-CONTACT-12186	Contact Information					08/24/2020	139610		\$0.00		View
	LAND-CONTACT-13362	Contact Information					08/24/2020	139610		\$0.00		View

Page 1 of 10

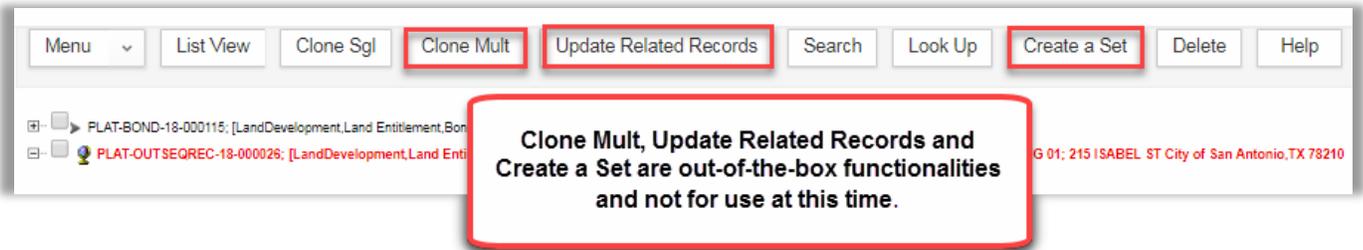
Cloning Records in the Record's Related Records Tab

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:

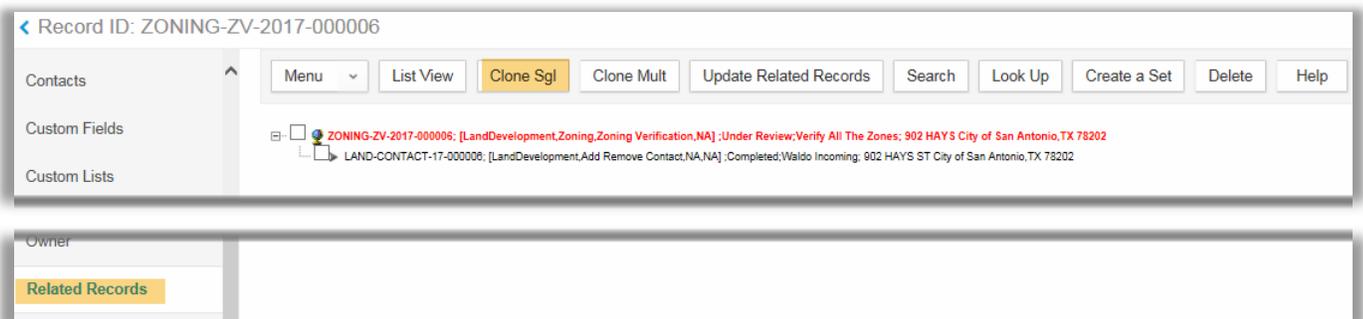
- **Cloning** child records from a parent record: When a record is cloned, the relevant information from the parent record is automatically transferred to the child record. ***When cloning a record select: Parcel, Owner, Address and Contact information to copy from parent to child.***



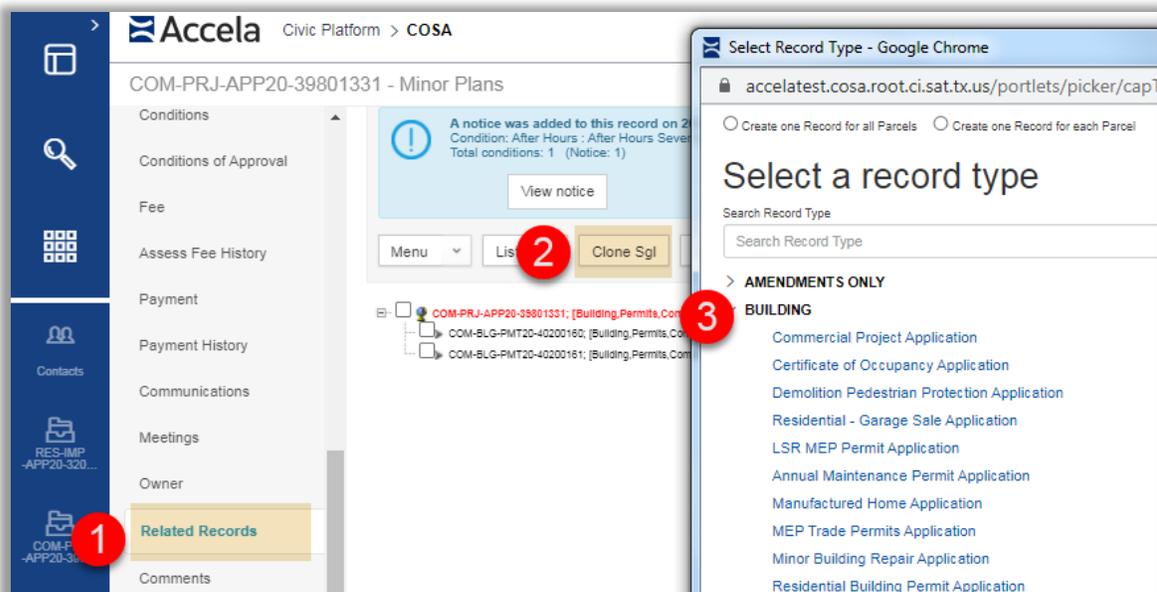
Cloning One Record

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).**

The screenshot shows three panels in a web application. The middle panel, titled 'General Record Information', contains several checkboxes. A yellow box highlights the 'Parcel', 'Owner', 'Address', and 'Contact' checkboxes, which are all checked. A yellow callout box with an arrow points to this group, containing the text: 'Click the box to the left of Parcel, Owner, Address and Contact.' Another yellow box highlights the 'Contact (Select)' checkbox with an arrow pointing to it. The left panel is titled 'Record Type - Specific Information' and the right panel is titled 'Record Conditions (Select)'.

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).

The screenshot shows a 'Related Records' tab for record ID LAND-PLAT-16-000428. At the top, there are buttons for 'Menu', 'List View', 'Clone Sgl', 'Clone Mult', 'Update Related Records', 'Search', and 'Look Up'. A yellow message box states: 'ZONING-ZV-2016-000198 record(s) added successfully.' Below the message, a list of records is displayed with expandable icons:

- LAND-PLAT-16-000427; [LandDevelopment, Land Entitlement, Plat, Major] ; Under Review; COSA Defect 66 Test - fees;
- LAND-PLAT-16-000428; [LandDevelopment, Land Entitlement, Plat, Major] ; Received; COSA Defect 66 Test - fees2 - debugging for duplicate Mylar fee;
- ZONING-ZV-2016-000198; [LandDevelopment, Zoning, Zoning Verification, NA] ; Under Review; training test 88;

A yellow box at the bottom left of the screenshot is labeled 'Related Records'.

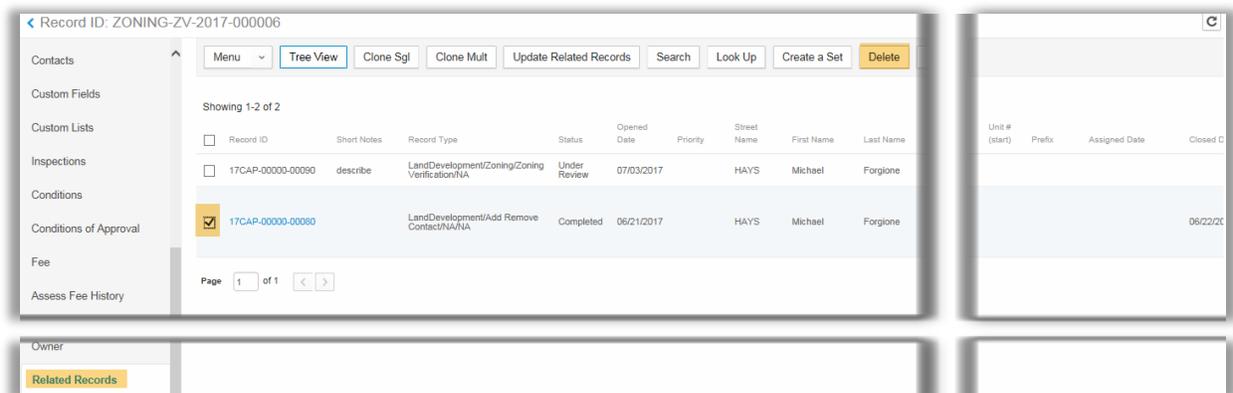
Deleting a Record from the Related Records Relationship

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***.



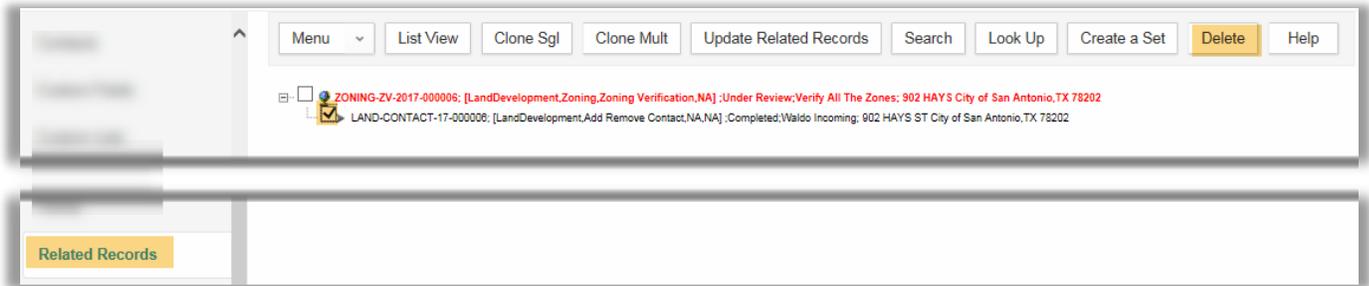
Example of List View

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



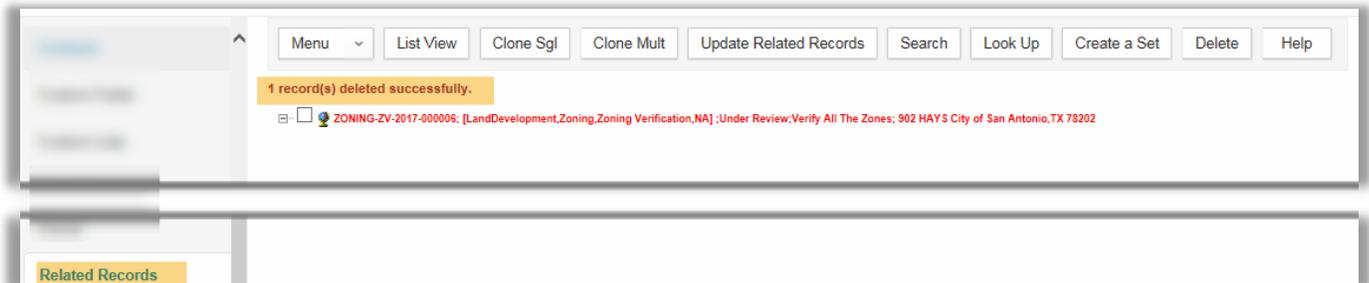
Using the Tree View

- 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).

ID	Record Type	Project Name	Opened Date	Description	Created By	Balance	Expiration Date
LAND-MDP-17-000010	Master Development Plan (MDP)	aaaa	09/13/2017		PUBLICUSER130	\$0.00	10/02/2017
LAND-MDP-17-000009	Master Development Plan (MDP)	testing Habitat email notice	03/27/2017		PUBLICUSER75	\$0.00	03/27/2017
LAND-MDP-17-000008	Master Development Plan (MDP)	MDP For Testing	03/21/2017		140277	\$0.00	03/21/2017
LAND-MDP-17-000007	Master Development Plan (MDP)	Testing out of ETJ	03/08/2017		PUBLICUSER75	\$0.00	03/08/2017
17TMP-000150	Master Development Plan (MDP)	Review of Review	03/02/2017		PUBLICUSER10	\$0.00	
17TMP-000148	Master Development Plan (MDP)	Pre-UAT Test Case 1.0 MDP	03/01/2017		PUBLICUSER75	\$0.00	
17TMP-000135	Master Development Plan (MDP)		02/27/2017		PUBLICUSER10	\$0.00	
17TEMP-000024	Master Development Plan (MDP)		02/17/2017		137131	\$0.00	02/17/2017

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

Record ID: LAND-MDP-16-000034

Navigation: Menu, List View, Clone Sgl, Clone Mult, Update Related Records, Search, **Look Up**, Create a Set, Delete, Help

Related Records:

- LAND-MDP-16-000034; [LandDevelopment.Land Entitlement.Master Development Plan.NA] :Approved:MDP3; 515 S FRIO City of San Antonio, TX 78207
- ZONING-ZV-2017-000004; [LandDevelopment.Zoning.Zoning Verification.NA] ;issued:IC/RIP Test: 1901 S ALAMO ST City of San Antonio, TX 78204
- LAND-PLAT-17-000048; [LandDevelopment.Land Entitlement.Plat.Minor] ;Under Review:Pre-UAT Test Case 1.0 Minor4;

Owner: [Name]

Related Records

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.

Record ID: LAND-MDP-16-000034

Submit Reset Cancel Help Enable Soundex Search

Search by Record Attributes

Record Type Group: --Select-- Type: --Select-- Subtype: --Select-- Category: --Select--

Opened Date: From: 11/12/1967 To: 10/30/2017

Record ID: LAND-BSL-16-000003 Status: --Select--

Current Workflow Task: --Select-- Current Workflow Status: --Select--

Search by Contact

First Name: Last Name:

Contact Organization Name: E-mail:

Search by Address/Parcel

Street #: Street Name: Street Type: --Select--

Unit/ Suite: City Parcel Number: Legal Description: check spelling

County Property ID:

Related Records

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.**

Record ID: LAND-MDP-16-000034

Menu Select as Parent Select as Child Search Cancel Help

<input type="checkbox"/>	Alternate ID	Record Type Alias	Status	Opened Date	Street #	Street Name	Street Type
<input checked="" type="checkbox"/>	LAND-BSL-16-000003	Building Setback Line Replat	Additional Info Required	09/22/2016	1126	DENVER	BLD

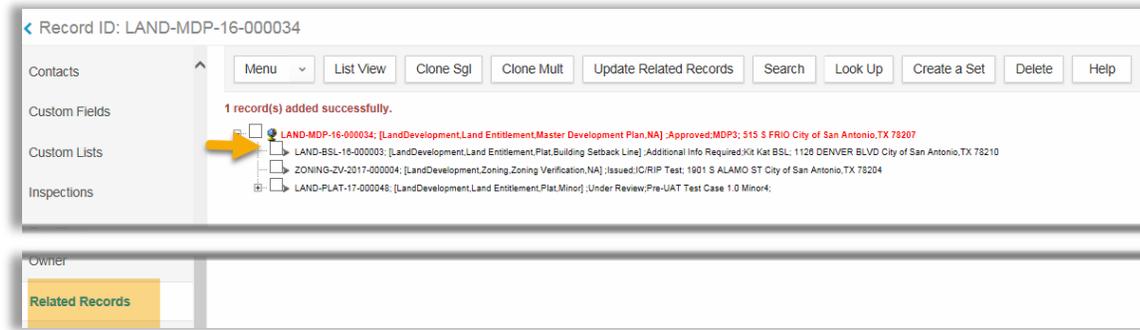
E-mail	Record ID
larry.odis@s...	16CAP-00000-00134

Owner

Related Records

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).

Menu Manage Meeting Calendar Help

Subject	Meeting Body	Date	Start Time	Status	Assign Status
TEST	Board of Adjust...	07/10/2017	06:00	Scheduled	

Any meeting that is already scheduled displays on the Meetings page. Click on the hyperlink to see meeting details.

Meetings

Details Send Submit Cancel Help

Agenda & Vote Meeting Type * BOARD OF ADJUSTMENT Meeting Body * Board of Adjustment

Attendees Date * 07/10/2017 All Day Event Meeting Status --Select-

Attendance Start Time * 06:00 AM End Time * 07:00 AM

Attachments Maximum Agenda Items * 1 Reminder * 7 Day(s)

Subject * TEST

Comments

check spelling

Location Board Room Organizer PR16000

Responsible Person * Current User Land Entitlement Patricia Rosas

View and/or update meeting details on the Meeting Details page.

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.**

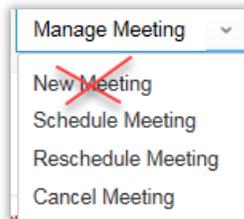


At this time, BuildSA back-office and Outlook are not linked.

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.

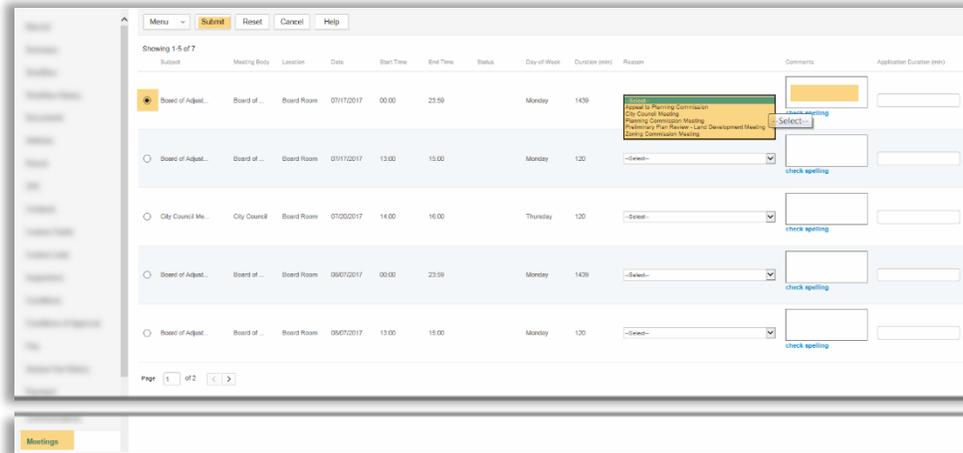
1. **Retrieve** the Record.
2. From the record's navigation bar, **navigate** to the Meetings Tab.
3. **Click** the Manage Meeting button drop-down arrow to display options (shown).



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).

	Subject	Meeting Body	Date	Start Time	Status	Assign Status
<input type="radio"/>	General Functional...	Board of Adjust...	07/11/2017	06:00		Scheduled
<input type="radio"/>	Board of Adjustmen...	Board of Adjust...	07/17/2017	00:00		Scheduled

Modifying, Rescheduling and Cancelling Meetings

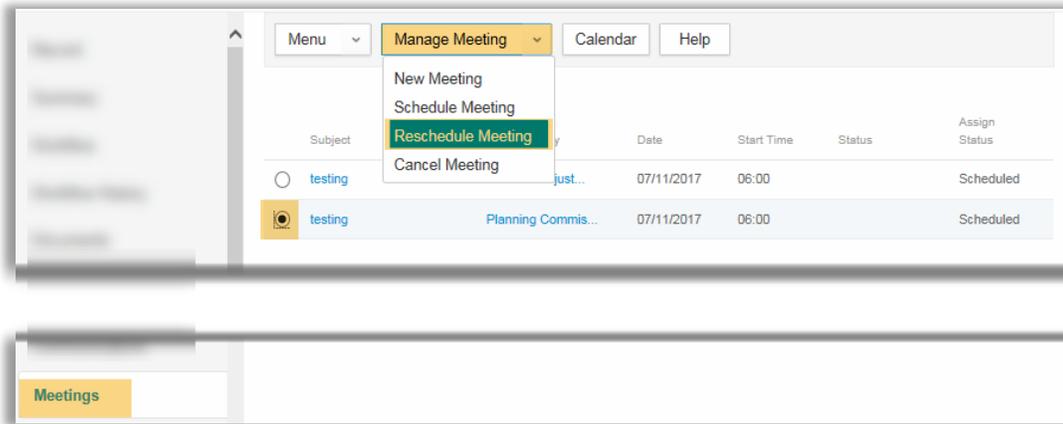
You can modify meeting details such as meeting date, time, location, or status.

To modify meeting details

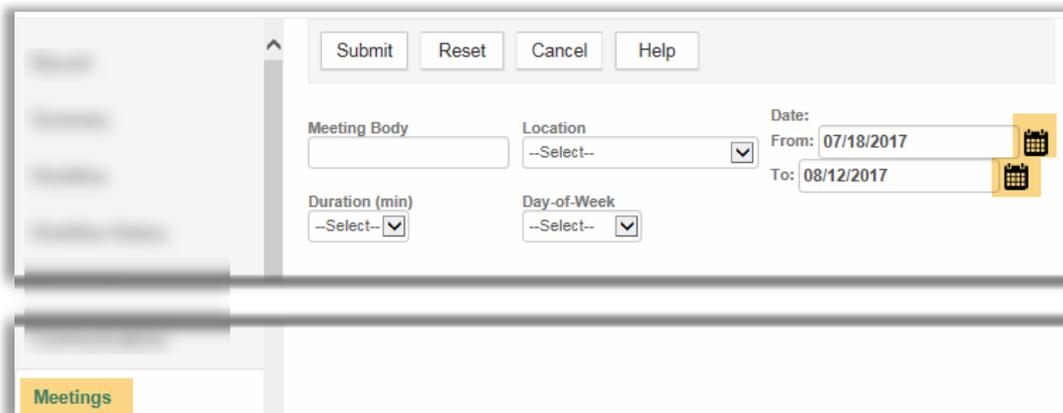
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Meetings Tab. All scheduled meetings are displayed.
3. **Click** the hyperlink for the meeting you want to modify. Meeting Details page displays.
4. **Modify** meeting details, as required.
5. **Click** Submit.

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).

Record

Menu Submit Reset Cancel Help

Showing 1-5 of 7

Subject	Meeting Body	Location	Date	Start Time	End Time	Status	Day-of-Week	Duration (min)	Reason	Comments
Planning Commis...	Planning ...	Planning ...	06/27/2018	14:00	16:00		Wednesday	120	<input type="text" value="Select"/> Appeal to Planning Commission City Council Meeting Planning Commission Meeting Preliminary Plan Review - Land Development Meeting Zoning Commission Meeting	<input type="text"/> check spelling

Communications

Meetings

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

Details

Send Submit Cancel Help

Meeting Type *
ZONING COMMISSION MEET

Meeting Body *
Zoning Commission

Date *
7/18/2017

All Day Event

Meeting Status
--Select--

Start Time *
01:00 PM

End Time *
03:00 PM

Maximum Agenda Items *
5

Reminder *
0 Day(s)

Subject *
Zoning Commission Meeting

Comments

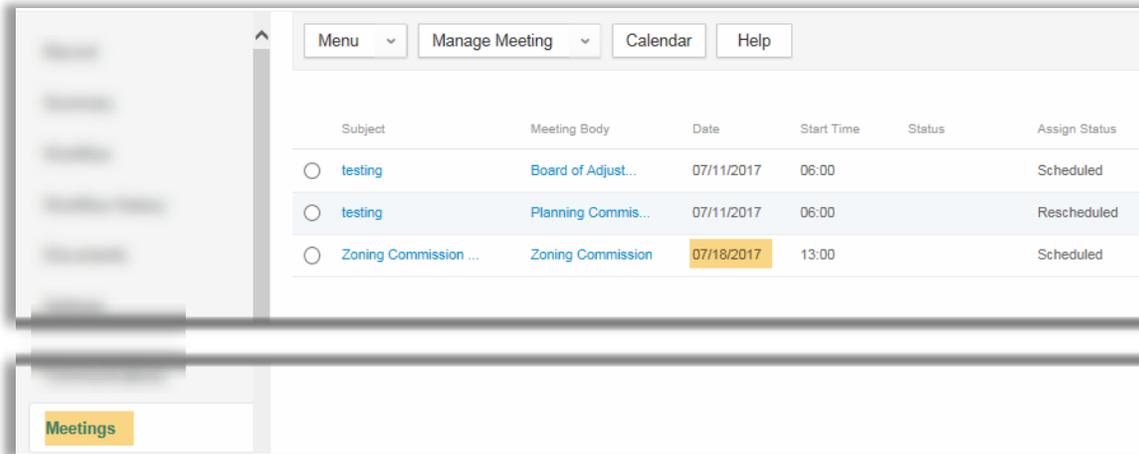
[check spelling](#)

Location
Camp Conference Room

Organizer
PR16000

Responsible Person * **Current User**
System Administ Rick H Foggo

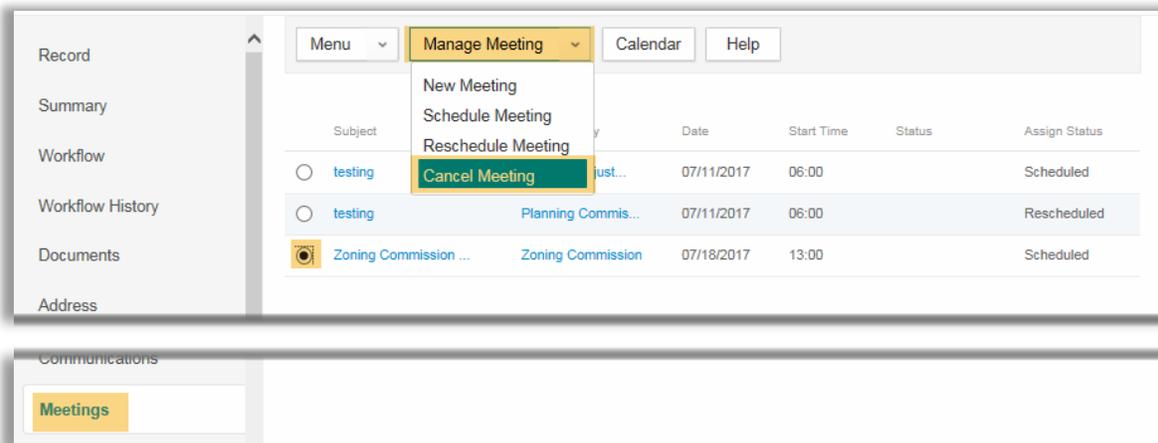
13. **Click** the Cancel button to return to the Record's Meeting page.



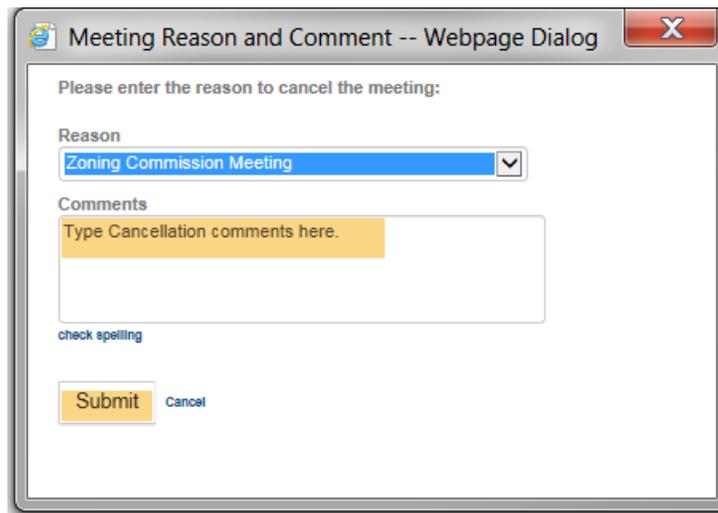
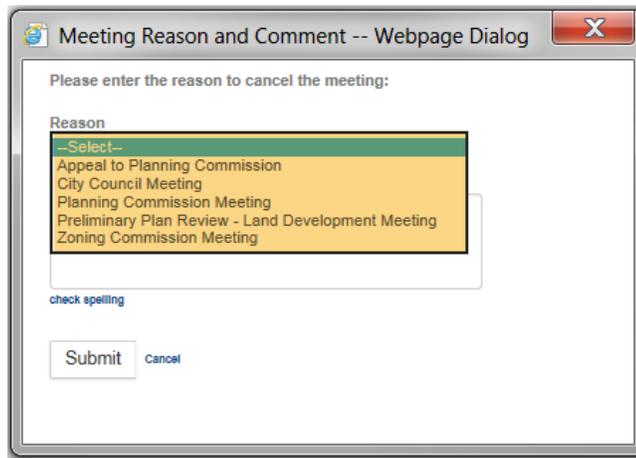
14. On the Record's Meeting page, **verify** the new date for the meeting.

To cancel a meeting

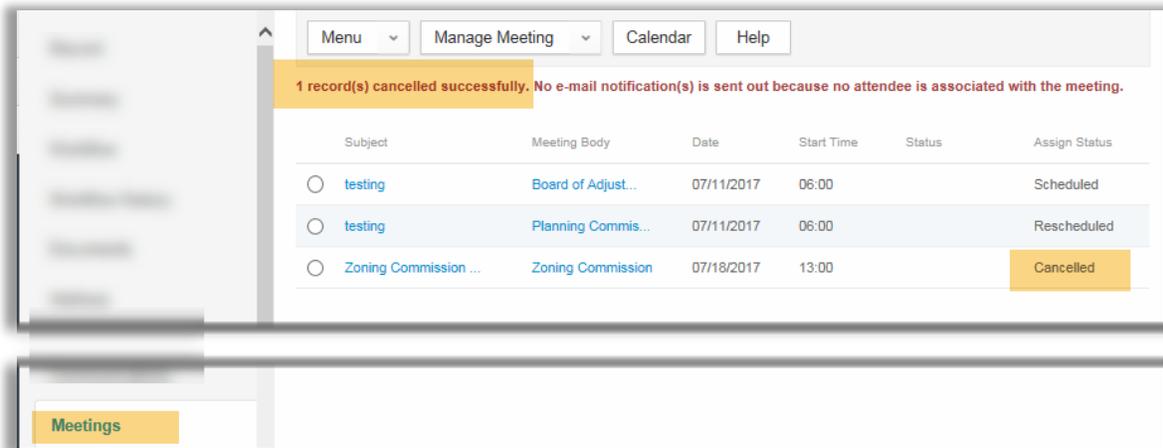
1. **Retrieve** the Record.
2. From the Record's navigation bar, **click** on the Meetings Tab. All scheduled meetings are displayed.
3. **Click** the radio button to the left of the meeting you want to cancel.
4. **Hover** over the Manage Meeting arrow drop-down menu to display options (shown).
5. **Click**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



- Type** Cancellation comments in the Comments field box, if applicable (shown).
- 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.**

The screenshot shows the 'Fee' tab interface. At the top, there is a menu bar with buttons: Menu, Add, Undo, Delete, Void, Invoice (highlighted with a red circle 3), Invoice & Pay, ReCalc, and Help. Below the menu, the 'Fee Calc. Factor' is set to 'Job Value/Contractor(\$0.00)' and the 'Fee Total' is \$1,900.00. A table lists four fees with columns for Invoice #, Fee Item, Assessed, Quantity, Unit, Amount, Balance Due, Status, Notes, and Fee Code. The first fee, 'MDP, POADP, PUD, MAOZ, MHPP - MDRPOADP/PUD Plan Amendment', has a status of 'NEW' and a checkbox to its left (highlighted with a red circle 2). The 'Invoice' button is highlighted with a yellow box and an arrow pointing to the 'NEW' status (highlighted with a red circle 3). A callout box on the right says: 'If any fees have a status of New, click the check box to the left of the invoice # and then click the Invoice button.' The bottom navigation bar shows the 'Fee' tab selected (highlighted with a red circle 1).

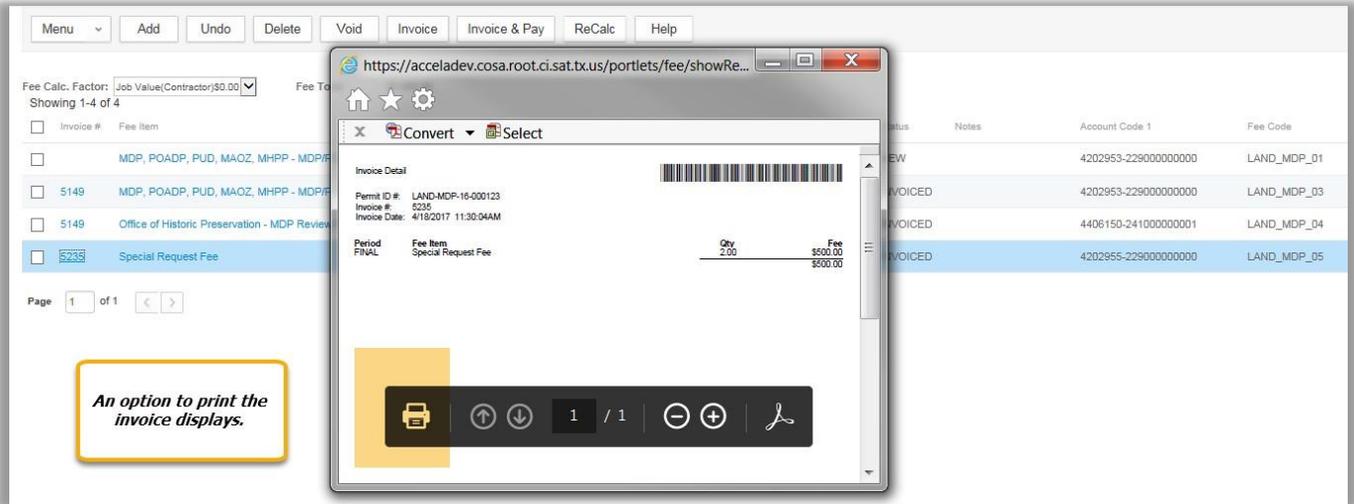
Invoice #	Fee Item	Assessed	Quantity	Unit	Amount	Balance Due	Status	Notes	Fee Code
<input type="checkbox"/>	MDP, POADP, PUD, MAOZ, MHPP - MDRPOADP/PUD Plan Amendment	07/11/2017	1	Dolla...	\$500.00	\$500.00	NEW		0000 LAND_MDP_01
<input type="checkbox"/>	5149 MDP, POADP, PUD, MAOZ, MHPP - MDRPUD/MAOZ/MHPP Plan Review	12/09/2016	1	Dolla...	\$700.00	\$0.00	INVOICED		0000 LAND_MDP_03
<input type="checkbox"/>	5149 Office of Historic Preservation - MDP Review Fee	12/09/2016	1	Dolla...	\$200.00	\$0.00	INVOICED		0001 LAND_MDP_04
<input type="checkbox"/>	5235 Special Request Fee	04/18/2017	2	Dolla...	\$500.00	\$500.00	INVOICED	4202965-229000000000	LAND_MDP_05

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

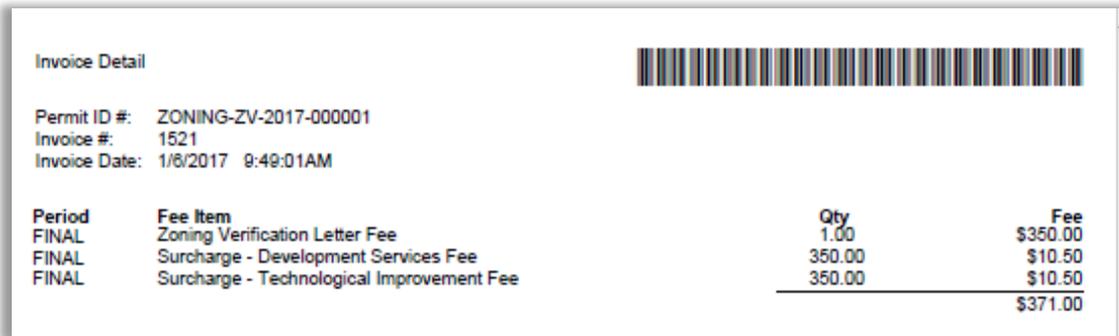
The screenshot shows the 'Fee' tab interface with a list of fees. The 'Fee Calc. Factor' is 'Job Value/Contractor(\$0.00)' and the 'Fee Total' is \$371.00. The table lists three fees with columns for Invoice #, Fee Item, and Fee Code. The 'Invoice #' column is highlighted in yellow, and the 'Invoice' button in the top menu bar is also highlighted in yellow.

Invoice #	Fee Item	Fee Code
1521	Zoning Verification Letter Fee	0000 LD_ZV_01
1521	Surcharge - Development Services Fee	0000 LD_ZV_06
1521	Surcharge - Technological Improvement Fee	0000 LD_ZV_07

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



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



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).

The screenshot shows the 'Summary' tab selected in the navigation bar. The main content area displays the following information:

LOW IMPACT DEVELOPMENT
 Low Impact Development Best Management Practices Other

GIS JURISDICTIONS

Type	Value	Parcel

Documents:

File Name	Document Group	Category	Description	Type	Document Status	Document Status Date
Desert.jpg	LAND_MDP	Plan in AutoCad	hrrer jeawjweajre...	image/jpeg	Uploaded	12/09/2016
Lighthouse.jpg	LAND_MDP	Master Developm...	fdfdaf af	image/jpeg	Uploaded	12/09/2016

[Show all](#)

Address: 111 SOLEDAD City of San Antonio, TX 78205
 Parcel No: 5674
 Total Fee Assessed: \$2,150.00
 Total Fee Invoiced: \$1,650.00
 Balance: \$750.00

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

The close-up shows the fee summary with an arrow pointing to the 'Balance: \$750.00' text. A callout box contains the following text:

At the bottom of the Summary page, click on the Balance amount hyperlink. BuildSA back-office opens the Record's Payment page.

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

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

Payment

Pay Apply Refund Void Generate Receipt Fund Transfer Trust Account Deposit Help

Total Invoice Amount: \$347.00
 Total Payment: \$0.00
 Total Balance: \$347.00
 Amount Not Applied: \$0.00

Terminal #: PR16000
 Cashier ID: PR16000
 Date: 04/21/2017

Invoices

Invoice #	Amount	Paid in Full	Balance
1820	\$337.00	Y	\$0.00
1821	\$10.00	Y	\$0.00

Transactions

Transaction Code Transactions Method Receipt # Not Applied Amount Status Received Trust Account ID Cashier ID Date

0 record(s) found.

https://accelstaging.sanantonio.gov/portlets/fee/showRec...

Convert Select

What Are the Causes of C... Leading Research, Articles...

Invoice Detail

Permit ID #: PLAT-TIMEEXT-17-000002
 Invoice #: 1820
 Invoice Date: 4/19/2017 2:44:40PM

Period	Fee Item	Qty	Fee
FINAL	Land Development Convenience Fee	1.00	\$10.00
FINAL	Recordation Handling Fee	1.00	\$50.00
FINAL	Bexar County Legal Document Recording Fee	102.00	\$102.00
FINAL	Major Plat - Office of Historic Preservation - Review Fee	1.00	\$175.00
FINAL	Surcharge - Technological Improvement Fee	9.00	\$0.00
FINAL	Surcharge - Development Services Fee	9.00	\$0.00
			\$337.00

❖ **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).

Invoice #	Fee Item	Assessed	Quantity	Unit	Amount	Balance Due	Status	Notes	Account Code 1	Fee Code
	MDP_POADP_PUD_MAOZ_MHPP - MDP/POADP/PUD Plan Amendment	07/11/2017	1	Dolla...	\$500.00	\$500.00	NEW		4202953-229000000000	LAND_MDP_01
5149	MDP_POADP_PUD_MAOZ_MHPP - MDP/PUD/MAOZ/MHPP Plan Review	12/09/2016	1	Dolla...	\$700.00	\$0.00	INVOICED		4202953-229000000000	LAND_MDP_03
5149	Office of Historic Preservation - MDP Review Fee	12/09/2016	1	Dolla...	\$200.00	\$0.00	INVOICED		4406150-241000000001	LAND_MDP_04
5235	Special Request Fee	04/18/2017	2	Dolla...	\$500.00	\$500.00	INVOICED		4202955-229000000000	LAND_MDP_05
5236	Special Request Fee	07/11/2017	1	Dolla...	\$250.00	\$250.00	INVOICED		4202955-229000000000	LAND_MDP_05

Page 1 of 1

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

Fee Code	Fee Item	Quantity	Unit	Notes
LAND_MDP_01	MDP_POADP_PUD_MAOZ_MHPP - MDP/POADP/PUD Plan Amendment	<input type="text"/>	Dollar Amt	<input type="text"/>
LAND_MDP_02	MDP_POADP_PUD_MAOZ_MHPP - MDP/POADP/PUD Validity Verification	<input type="text"/>	Dollar Amt	<input type="text"/>
LAND_MDP_03	MDP_POADP_PUD_MAOZ_MHPP - MDP/PUD/MAOZ/MHPP Plan Review	<input type="text"/>	Dollar Amt	<input type="text"/>
LAND_MDP_04	Office of Historic Preservation - MDP Review Fee	<input type="text"/>	Dollar Amt	<input type="text"/>
LAND_MDP_05	Special Request Fee	<input type="text"/>	Dollar Amt	<input type="text"/>
LAND_MDP_06	Parks Platting Fees	<input type="text"/>		<input type="text"/>
LAND_MDP_07	Land Development Convenience Fee	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_01_AR	MDP_POADP_PUD_MAOZ_MHPP - MDP/POADP/PUD Plan Amendment - AR	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_02_AR	MDP_POADP_PUD_MAOZ_MHPP - MDP/POADP/PUD Validity Verification - AR	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_03_AR	MDP_POADP_PUD_MAOZ_MHPP - MDP/PUD/MAOZ/MHPP Plan Review - AR	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_04_AR	Office of Historic Preservation - MDP Review Fee - AR	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_05_AR	Special Request Fee - AR	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_06_AR	Parks Platting Fees - AR	<input type="text"/>	Dollar Amt	<input type="text"/>
MDP_07_AR	Land Development Convenience Fee - AR	<input type="text"/>	Dollar Amt	<input type="text"/>

- Ensure** the correct application type is displayed.
- Type** the Quantity of fees.
- 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).

COM-PRJ-APP20-39802586

A notice was added to this record on 2020-09-02.
Condition: Notification ; Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu **2** Submit Reset Cancel Help

Fee Schedule: FEE_DSD Version: 1.0

Fee Calc. Factor: Job Value(Contractor)\$0.00

Fee Code	Fee Item	Quantity	Unit	Notes
DSD_01_DV_AR	Surcharge - Development Services Fee	1	Dollar Amt	
DSD_02_TC_AR	Surcharge - Technological Improvement Fee		Dollar Amt	
DSD_01_DEV	Surcharge - Development Services Fee		Dollar Amt	
DSD_02_TECH	Surcharge - Technological Improvement Fee		Dollar Amt	

Conditions of Approval

Fee

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).**

COM-PRJ-APP20-39802586

A notice was added to this record on 2020-09-02.
Condition: Notification ; Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu Add Undo Delete **2** Invoice Invoice & Pay ReCalc Help

Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$223.08

Showing 1-11 of 11

Fee Item	Invoice #	Assessed	Quantity	Unit	Amount	Balance Due	Status	Notes
<input checked="" type="checkbox"/> Surcharge - Development Serv...		09/02/2020	1	Dolla...	\$0.00	\$0.00	NEW	
<input type="checkbox"/> Convenience Fee	56264	08/25/2020	1		\$10.00	\$0.00	INVOICED	COM

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.

Record

Pay Apply Refund Void Generate Receipt Fund Transfer Trust Account Deposit Help

Summary
Total Invoice Amount: \$1,514.50
Total Payment: \$1,264.50
Total Balance: \$250.00
Amount Not Applied: \$0.00

Terminal #: PR10000
Cashier ID: PR10000
Date: 05/07/2018

Workflow History

Documents

Invoice #	Amount	Paid in Full
1146	\$1,264.50	Y
5614	\$250.00	N

Address

Parcel

GIS

Contacts

Assess Fee History

Payment

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

Record

Menu Add Delete Void Invoice Invoice & Pay ReCalc Help

Summary
Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total: \$2,155.50
Showing 6-10 of 13

Workflow History

Assessed	Balance Due	Invoice #	Quantity	Unit	Fee Item	Amount	Status	Account Code 1
<input checked="" type="checkbox"/>	05/07/2018 \$250.00	5614	1	Dollar Amt	Short Public Hearing Fee	\$250.00	INVOICED	4202954-22900000
<input type="checkbox"/>	05/07/2018 \$600.00		1	Dollar Amt	Long Public Hearing Fee	\$600.00	NEW	4202954-22900000
<input type="checkbox"/>	10/26/2016 \$0.00	1146	1		Recordation Handling Fee	\$50.00	INVOICED	4406154-22900000
<input type="checkbox"/>	10/26/2016 \$0.00	1146	2		Bexar County Recording Fee(Mylar)	\$164.00	INVOICED	2120253-2900-6900
<input type="checkbox"/>	10/26/2016 \$0.00	1146	34		Bexar County Legal Document Recording Fee	\$34.00	INVOICED	2120253-2900-6900

Address

Parcel

GIS

Contacts

Conditions of Approval

Fee

Page 2 of 3

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).

Invoice #	Amount	Paid in Full
1146	\$1,264.50	Y
5614	\$250.00	Y

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status
546	Payment	Card Payment	571	\$0.00	\$1,264.50	Paid

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

Record

Menu Add Delete Void **Invoice** Invoice & Pay

Summary Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$2,150.50

Showing 6-10 of 13

Assessed	Balance Due	Invoice #	Quantity	Unit	Fee Item	Amount	Status	Account Code 1	
<input checked="" type="checkbox"/>	05/07/2018	\$0.00	5614	1	Dollar Amt	Short Public Hearing Fee	\$250.00	VOIDED	4202954-229000000000
<input type="checkbox"/>	05/07/2018	\$600.00	1		Dollar Amt	Long Public Hearing Fee	\$600.00	NEW	4202954-229000000000
<input type="checkbox"/>	10/26/2016	\$0.00	1146	1		Recordation Handling Fee	\$50.00	INVOICED	4406154-229000000000
<input type="checkbox"/>	10/26/2016	\$0.00	1146	2		Bexar County Recording Fee(Mylar)	\$164.00	INVOICED	2120253-2900-69002002
<input type="checkbox"/>	10/26/2016	\$0.00	1146	34		Bexar County Legal Document Recording Fee	\$34.00	INVOICED	2120253-2900-69002002

Page 2 of 3

Conditions of Approval

Fee

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).

Record

Pay Apply Refund Void Generate Receipt Fund Transfer Trust Account Deposit Help

Summary Total Invoice Amount: \$1,264.50 Terminal #: PR14000
Total Payment: \$1,264.50 Cashier ID: 05/07/2019
Total Balance: \$0.00
Amount Not Applied: \$0.00

Invoices

Invoice #	Amount	Paid in Full	Balance
1146	\$1,264.50	Y	\$0.00
5614	\$250.00	Y	\$0.00
5620	(\$250.00)		\$0.00

Verify balance, Example shows \$0.00. Voided invoice is now cleared.

Transactions

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status	Received	Trust Account ID	Cashier ID	Date
546	Payment	Card Payment	571	\$0.00	\$1,264.50	Paid			PUBLICUSER3	10/26/2016

Assess Fee History

Payment

The Payment Tab

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

The screenshot displays the 'Payment Tab' interface. At the top, there are buttons for 'Pay', 'Apply', 'Refund', 'Void', 'Generate Receipt', 'Fund Transfer', 'Trust Account Deposit', and 'Help'. Below these, a summary box shows:

Total Invoice Amount:	\$1,947.30
Total Payment:	\$0.00
Total Balance:	\$1,947.30
Amount Not Applied:	\$0.00

Terminal #: PR10000
Cashier ID: PR10000
Date: 05/07/2018

The 'Invoices' table is as follows:

Invoice #	Amount	Paid in Full	Balance
1787	\$225.00	N	\$225.00
1788	\$1,122.30	N	\$1,122.30
5613	\$600.00	N	\$600.00

The 'Transactions' section shows 0 record(s) found.

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.

Invoice #	Amount
78	\$200.00
6131	\$250.00
6132	\$560.00

Transaction Code	Transactions	Method	Receipt #	Not Applied	Date
<input type="checkbox"/>	Payment	iCRIP		\$250.00	05/25/2018
<input type="checkbox"/>	Payment	Trust Account	29	\$0.00	08/14/2018

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.

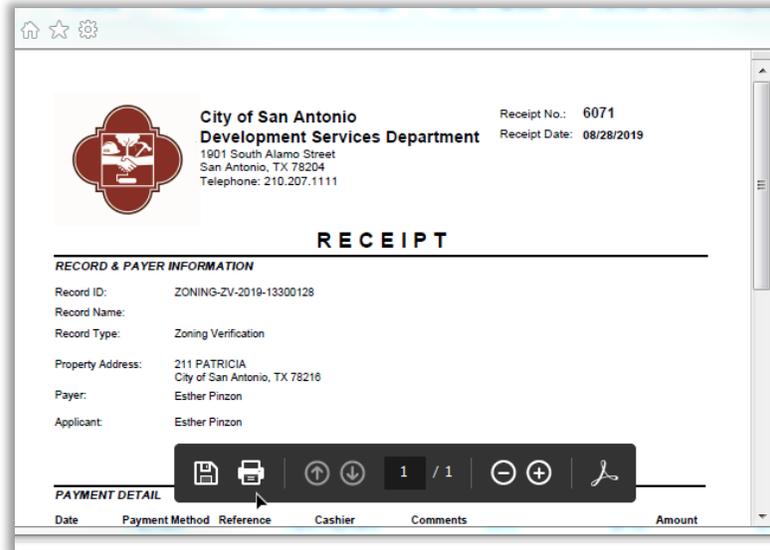
4. **Verify** the Amount.
5. **Click Save.**

Quantity	Fee	Paid	Outstanding	Amount	Notes
1	\$50.00	\$50.00	\$0.00	10.00	X

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.

Generate Receipt:	Transactions	Method	Date	Amount
<input checked="" type="checkbox"/>	Payment	City Department	08/28/2019	\$10.00

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.

LAND-PLAT-16-000032 - ICRIP Test

Pay Apply Refund Void Generate Receipt Fund Transfer Trust Account Deposit Help

Record
Summary
Workflow
Workflow History
Documents
Address
Parcel
GIS
Contacts
Custom Fields
Custom Lists
Inspections
Conditions
Conditions of Approval
Fee
Assess Fee History
Payment

Total Invoice Amount: \$11,292.00
Total Payment: \$11,292.00
Total Balance: \$0.00
Amount Not Applied: \$2,585.50

Terminal #: PR16000
Cashier ID: PR16000
Date: 06/05/2018

Invoice #	Amount	Paid in Full	Balance
211	\$225.00	Y	\$0.00
212	\$1,721.50	Y	\$0.00
301	\$6,125.00	Y	\$0.00
821	\$2,760.50	Y	\$0.00
843	\$400.00	Y	\$0.00
1498	\$50.00	Y	\$0.00
8412	\$10.00	N	(\$10.00)

Transaction Code	Transactions	Method	Receipt #	Not Applied	Amount	Status	Received	Trust Account ID	Cashier ID	Date
<input type="checkbox"/>	Payment	ICRIP	4181	\$0.00	\$10.00	Paid			PR16000	06/05/2018
<input type="checkbox"/>	Payment	ICRIP	4181	\$2,585.50	\$2,995.50	Paid			PR16000	05/31/2018
<input type="checkbox"/>	Payment	ICRIP	4181	\$0.00	\$50.00	Paid			140277	12/22/2016
<input type="checkbox"/>	Refund	Cash	442	\$0.00	(\$400.00)	Refund			ADMIN	10/17/2016
<input type="checkbox"/>	Refund	Check	417	\$0.00	(\$2,195.50)	Refund			MFRANK	10/14/2016
<input type="checkbox"/>	Payment	ICRIP	390	\$0.00	\$2,760.50	Paid			MFRANK	10/13/2016
<input type="checkbox"/>	Payment	ICRIP	128	\$0.00	\$6,125.00	Paid			MFRANK	09/27/2016
<input type="checkbox"/>	Payment	ICRIP	76	\$0.00	\$1,946.50	Paid			MFRANK	09/23/2016

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

LAND-PLAT-16-000032 - ICRIP Test

Menu Add Delete Void Invoice Invoice & Pay ReCalc Help

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Conditions of Approval

Fee

Fee Calc. Factor: Job Value(Contractor)\$0.00 Fee Total \$11,717.00

Showing 1-5 of 18

Balance Due	Amount	Invoice #	Fee Item	Assessed	Quantity	Unit	Status	Notes	Account Code 1	Fee Code
(\$10.00)	\$10.00	6412	Land Development Convenience Fee	06/05/2018	1		INVOICED		4202955-229000000000	PLAT_MAJ_01
\$0.00	\$42.75	212	Surcharge - Technological Improvement Fee	09/23/2016	42.75		VOIDED		4406780-229000000000	PLAT_MAJ_02
\$0.00	\$42.75	212	Surcharge - Development Services Fee	09/23/2016	42.75		VOIDED		4406780-229000000000	PLAT_MAJ_03
\$0.00	\$10.00	212	Land Development Convenience Fee	09/23/2016	1	Dolla...	VOIDED		4202955-229000000000	LAND_SEQ_03
\$0.00	\$450.00	821	Bexar County Major Plat Base Fee	10/13/2016	1		VOIDED		2120167-29097000	PLAT_MAJ_04

Page 1 of 4

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).

Accela Civic Platform > COSA

COM-PRJ-APP20-39802586

Record

Summary

CREATE NEW RECORD

YOUR PAGES 2 ALL PAGES 3

REPORTS 4

Reports

Recent Clear

COM-PRJ-APP20-39802...

COM-PRJ-APP20-39801...

LAND-CONTACT-12019

A notice was added to this record on 2020-09-02.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Rep|

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).


Civic Platform > **CO SA**

Reports

Click arrow to the left of a category to expand.

- ▼ **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**
- ▼ **Zoning**
 - 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









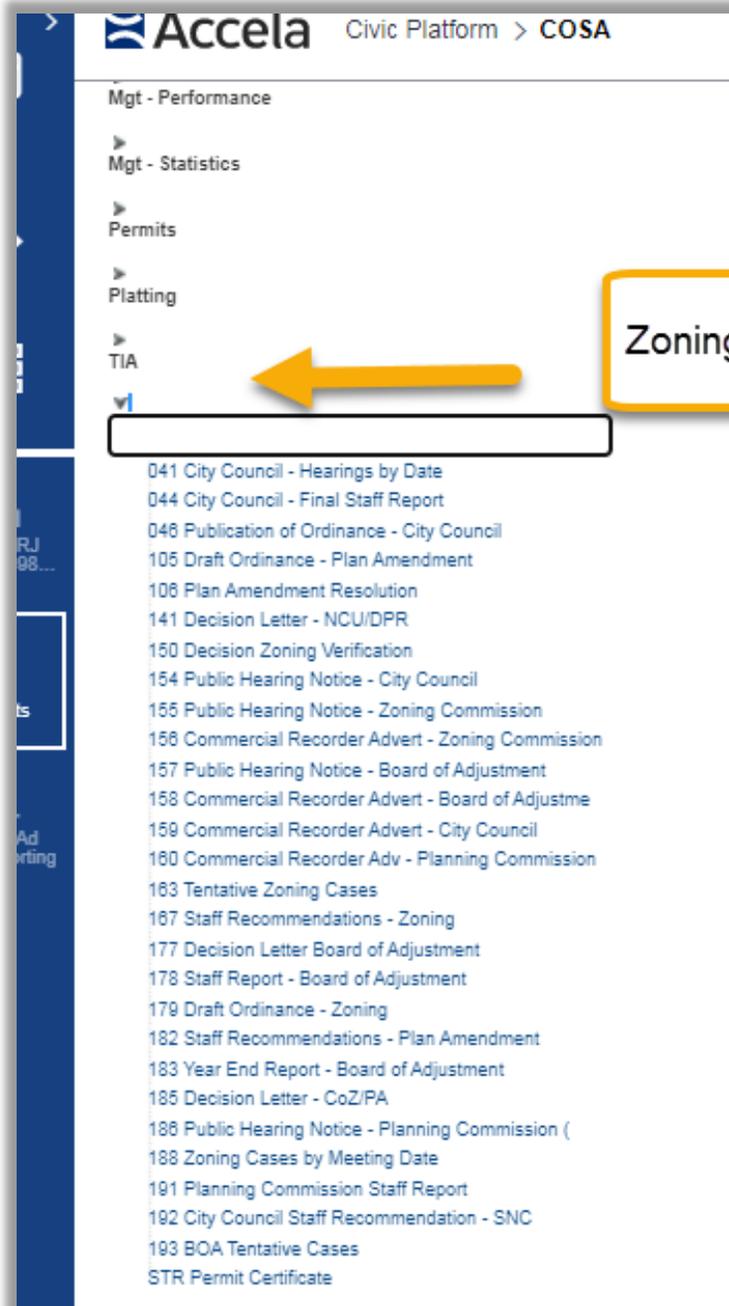
ZONING-ZV
-2019-1330...



Reports

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.



Zoning category expands.

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



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

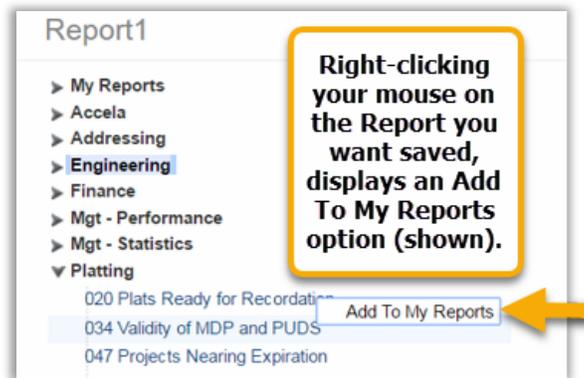
Inspection Type	Same Day	1 Day	2 Day	3 Day	4-5 Days	Over 5 Days	Total Count
Concrete Inspection							
Drainage Inspection							
Final Inspection							
Street Inspection							
TOTAL PLAT INSPECTIONS							
Pre-Final Inspection							
Site Visit							
Warranty Bond Inspection							
ALL INSPECTIONS							

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).

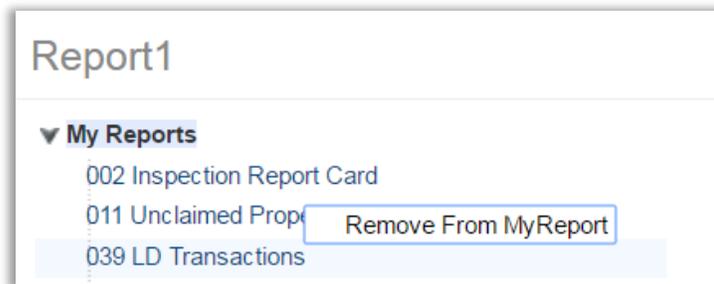


4. **Right-click** on *Add to My Reports*. BuildSA copies the report link in to your *My Reports* category.

❖ **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.

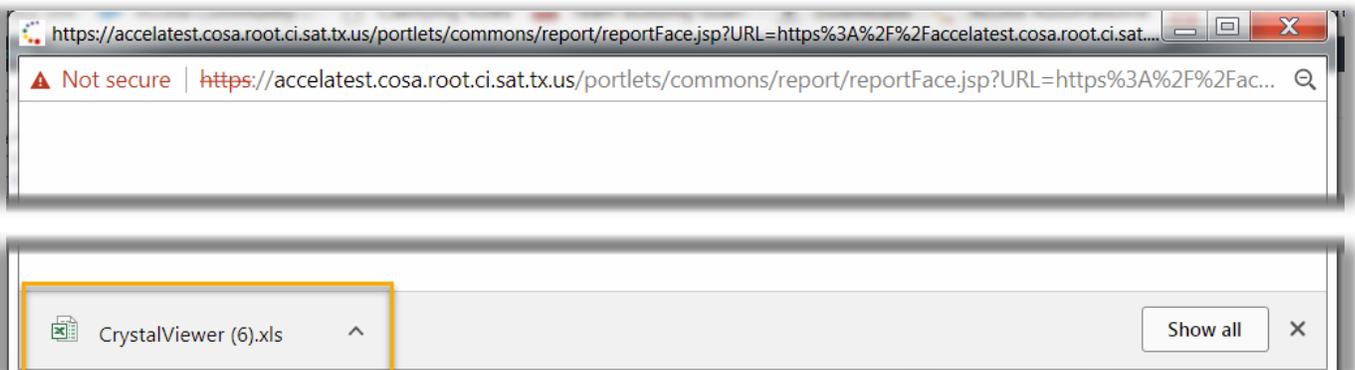
To generate the *Unassigned Reviews* report

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

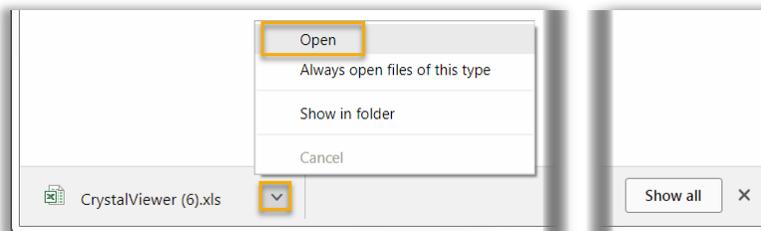
2. **Filter** for *Reports*.
3. **Click** the *Reports* hyperlink. The *Report* categories list displays (shown).
4. **Click** the arrow to the left of *Mgt-Performance* category to expand the category (shown).



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.

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 Platting		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).

Accela Civic Platform > COSA

Reports

My Reports

Accela

CREATE NEW RECORD

YOUR PAGES ALL PAGES

Recent Clear

COM-PRJ-APP20-39801...

COM-PRJ-APP20-39802...

LAND-CONTACT-12019

RES-IMP-APP20-32001029

CUSTOM PAGE

☆ Clear Cache (External Partne...

4 Clear Cache

☆ Clear Cache

☆ Clear Cache (External Partne...

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).

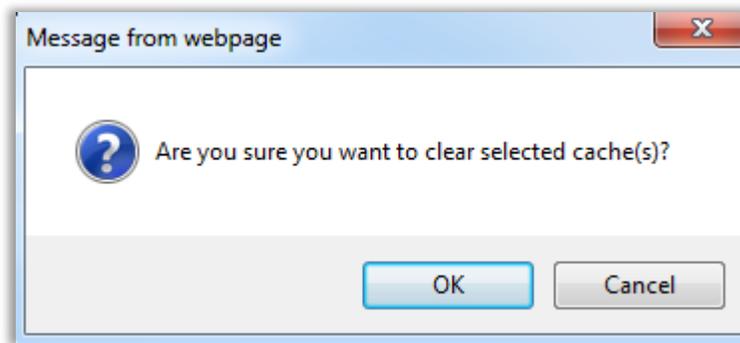
Accela Civic Platform > COSA

Cache

Menu **2** Clear Help

<input checked="" type="checkbox"/>	Cache Name	In Web Layer	In Business Layer
<input checked="" type="checkbox"/>	GUI Text	Yes	No
<input checked="" type="checkbox"/>	Generic View	Yes	No
<input checked="" type="checkbox"/>	Biz Domain & Sh...	Yes	Yes
<input checked="" type="checkbox"/>	Server Constant	Yes	Yes
<input checked="" type="checkbox"/>	Language List	Yes	No
<input checked="" type="checkbox"/>	Policy	Yes	No
<input checked="" type="checkbox"/>	Agencies	Yes	Yes

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

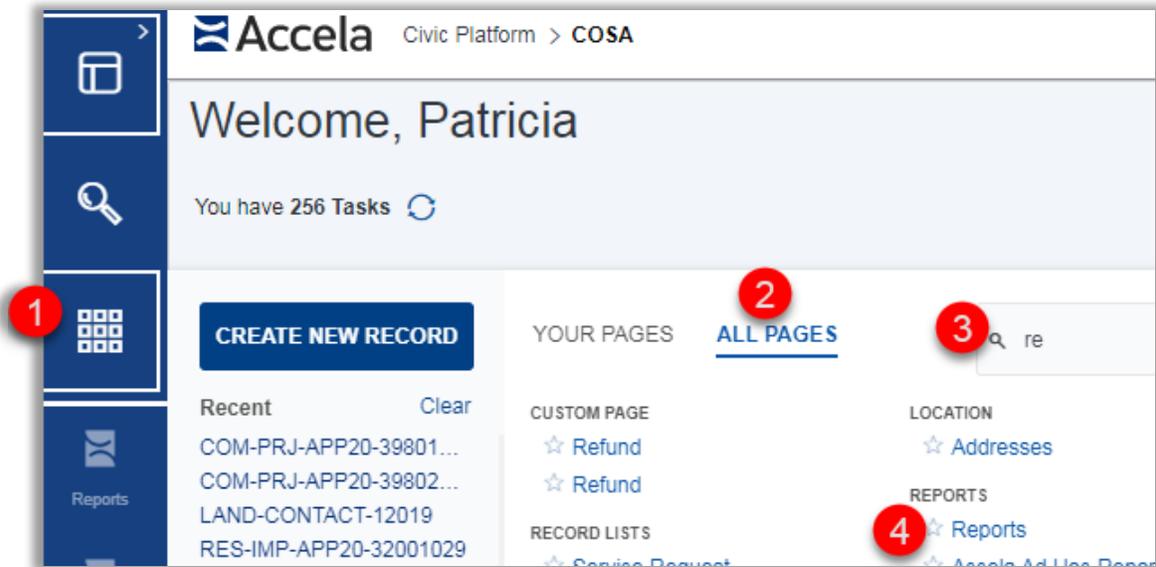
An Escrow Account application may be submitted online through ACA or as a paper application to the intake counters at DSD.

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

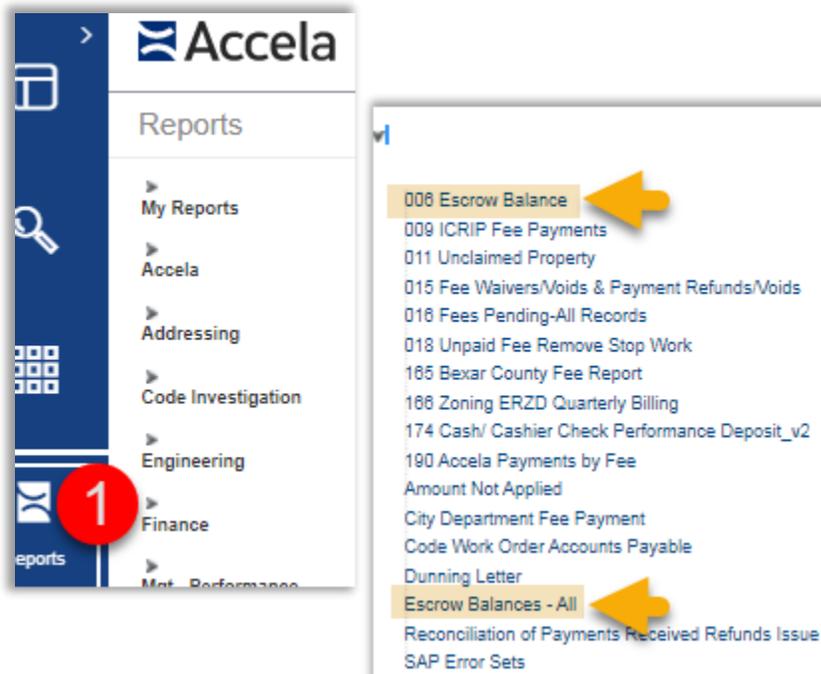
❖ IMPORTANT: Escrow Account Owners are responsible for managing their accounts using their account login in the Citizen Access Portal.

Using the Reports functionality

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



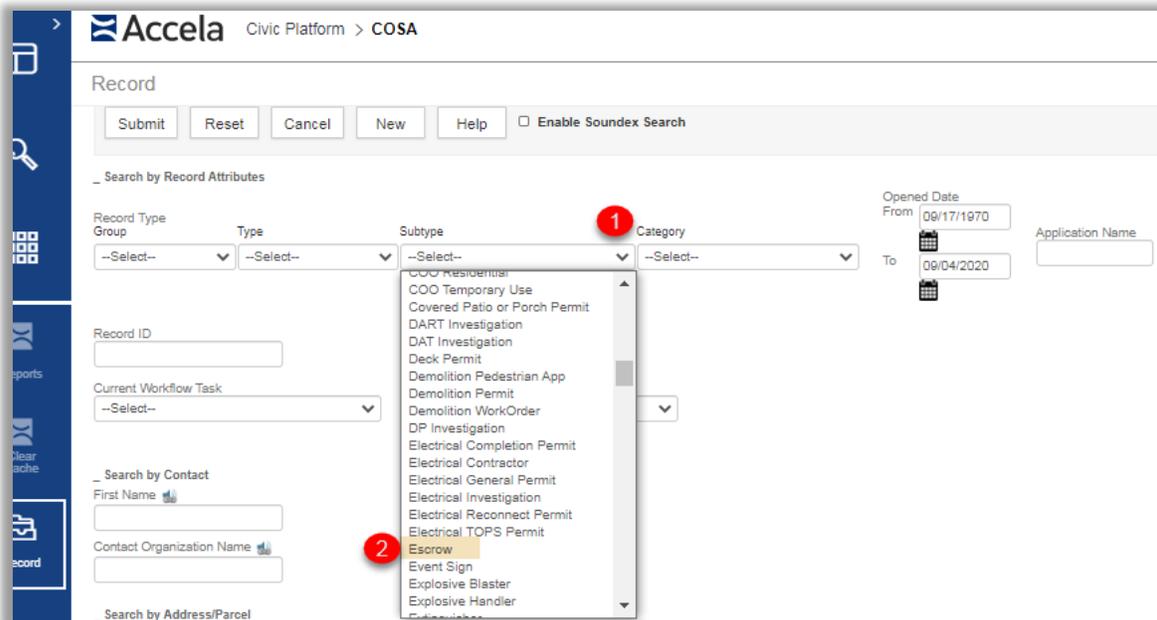
3. Click the arrow to the left of Finance to display all Finance report categories (# 1).



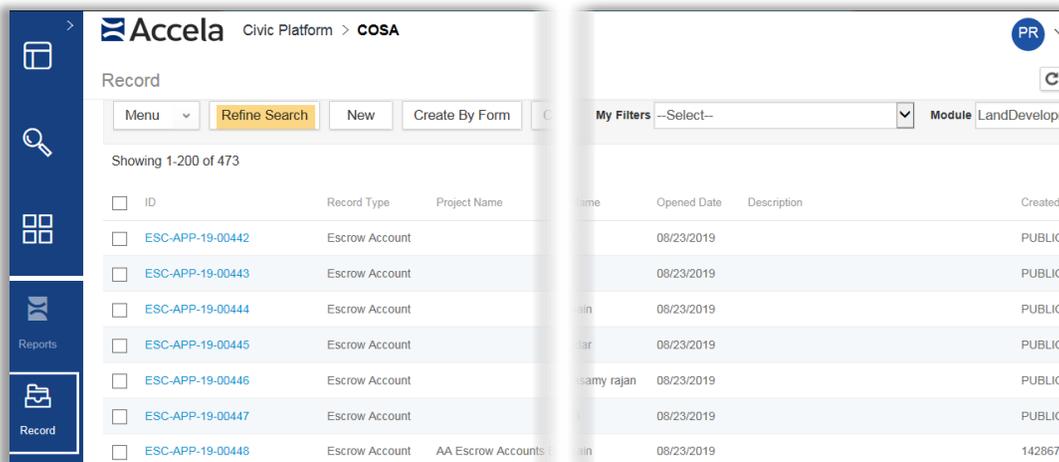
- To view *Individual Escrow Account* balances (must have Escrow Account number to generate report) select **Report # 006-Escrow Balance** (shown).
- To view *Escrow Account Balances for all Escrow Accounts*-Click **Escrow Balances-All** (shown).

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.

Accela Civic Platform > COSA

Record

Submit Reset Cancel Clear Search New Help Enable Soundex Search

Search by Record Attributes

Record Type Group Type Subtype Category

--Select-- --Select-- Escrow --Select--

Opened Date: From: 09/10/1969 To: 08/29/2019

Record ID Status

--Select-- --Select--

Current Workflow Task Current Workflow Status

--Select-- --Select--

Search by Contact

First Name Last Name

Kalina

Contact Organization Name E-mail

Custom Lists Field Name Custom Lists Field Value

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

Accela Civic Platform > COSA

Record

Menu Refine Search New Create By Form Help My Filters --Select--

Showing 1 of 1

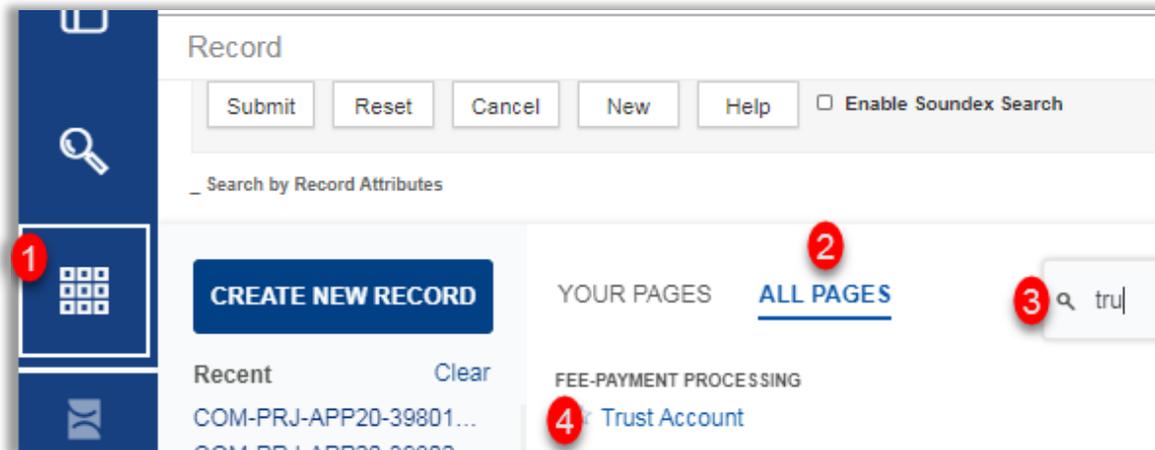
ID	Record Type	Project Name	Last Name	Opened Date	Description
<input type="checkbox"/> ESC-APP-19-00451	Escrow Account		AL Kawsar	08/23/2019	

Page 1 of 1

Using the Escrow Account Page Functionality

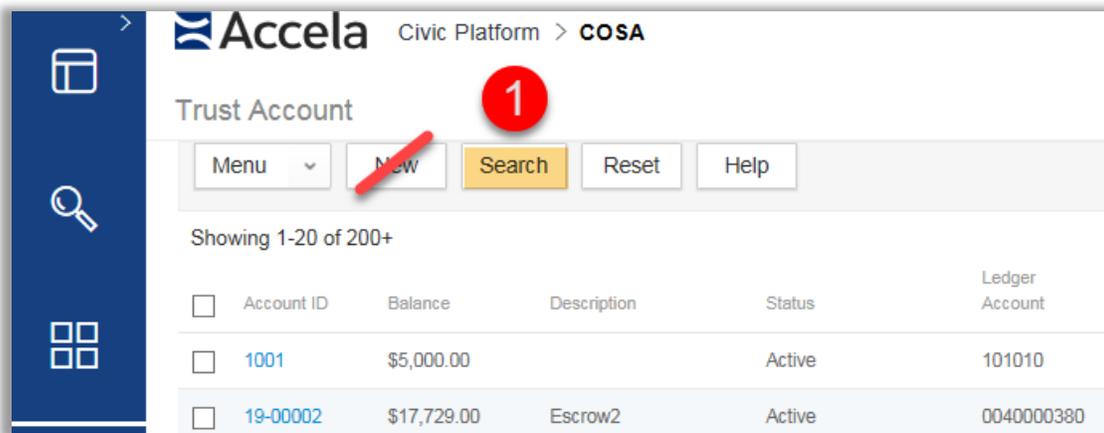
❖ ***IMPORTANT: Escrow Accounts are not created using this page. The New button is an out-of-the-box functionality and not for use.***

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)**.

Accela Civic Platform > COSA

Trust Account

Submit Reset Cancel Help

Account ID: 123456 Type: --Select-- First Name:

Middle Name: Last Name: Balance:

Description: Overdraft: --Select-- Overdraft Limit:

Status: --Select-- Ledger Account: Parcel #:

Lot: Range: Section:

Secondary Road: Secondary Road Number: Inspection District Prefix:

Neighborhood Prefix: Neighborhood: X Coordinate:

Y Coordinate: Level Prefix: Level # (start):

- 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).

Accela Civic Platform > COSA

Trust Account

Menu New Search

Showing 1-20 of 33

Account ID	Balance	Description	Status	Ledger Account
19-00117	\$0.00	Chavez (2)	Active	0040000383
19-00122	\$0.00	BuildSA123	Close	0040000417
19-00126	\$0.00	Caryn's Cupcake...	Active	
19-00128	\$0.00	Test 4.2	Active	
19-00139	\$0.00	Test ACA	Close	0040000426

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).

Accela Civic Platform > COSA

Trust Account

Account Detail

Associated Address

Associated Parcel

Associated People

Associated Record

Public User Permission

Transactions

Menu Help

Showing 31-60 of 323

Record ID	Record Type	Association	System ID
ZONING-ZV-2019-13300185	LandDevelopment/Zoning/Zoning Verification/NA	Contact	19CAQ-00000-03186
ESC-APP-19-00219	Profile/Finance/Escrow/Account	Contact	19CAQ-00000-03189
ZONING-ZV-2019-13300186	LandDevelopment/Zoning/Zoning Verification/NA	Contact	19CAQ-00000-03192
AMD-WR-19-13200105	Amendments/Withdrawal/Refund/NA/NA	Contact	19CAQ-00000-03200
AMD-WR-19-13200105	Amendments/Withdrawal/Refund/NA/NA	Parent Record	19CAQ-00000-03200
ESC-APP-19-00227	Profile/Finance/Escrow/Account	Contact	19CAQ-00000-03219

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 Record---listed under the Contact Tab.

Glossary

This section contains a listing of terms related to BuildSA.

<p>ACA (Accela Citizen Access) (Citizen Portal)</p>	<p>A configurable Web-based application that integrates with the Accela Civic Platform to provide citizens with online access to government services and information.</p>
<p>GIS (AGIS-Geographic Information System)</p>	<p>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.</p>
<p>Accela Mobile App</p>	<p>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.</p>
<p>Actions Button</p>	<p>On the Tasks Dashboard List View: provides the user access to commands that can be applied to one or more task items.</p>
<p>APO</p>	<p>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.</p>
<p>Civic Platform</p>	<p>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.</p>
<p>Cloning</p>	<p>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.</p>
<p>Condition</p>	<p>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:</p> <p>Lock: Essentially, the record is locked until the condition is met.</p> <p>Hold: Prevents you from scheduling or updating inspections, processing workflow tasks, and processing fees or cashiering.</p> <p>Notice: Indicates special instructions to the person completing the record. Notices do not inhibit the record process in any way.</p>

	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 <i>Pending, Accepted or Failed</i> .
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.
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