

On-line Tutorial Series

Module Seven

Working with Reference

Data and Conditions

Addresses

Reference Data is information that is stored in the BuildSA Database, independent of any application or record.

- ♦ **Users may search for and associate reference data when completing an application.**
- ♦ **When users associate reference data to individual records, the data populates automatically into the application.**

If a user associates a record to Reference Data (address, parcel, owner or contact) and the Reference Data bears a condition, then that condition also becomes part of the record.

Conditions ...

Do not necessarily impose holds but may prolong the workflow process until they are met.

Condition Icons

Condition Icons display on Daily Work Task Assignments



Indicates a *required* task (workflow tasks only).



Indicates a lock condition is in place. Records are *read only*.



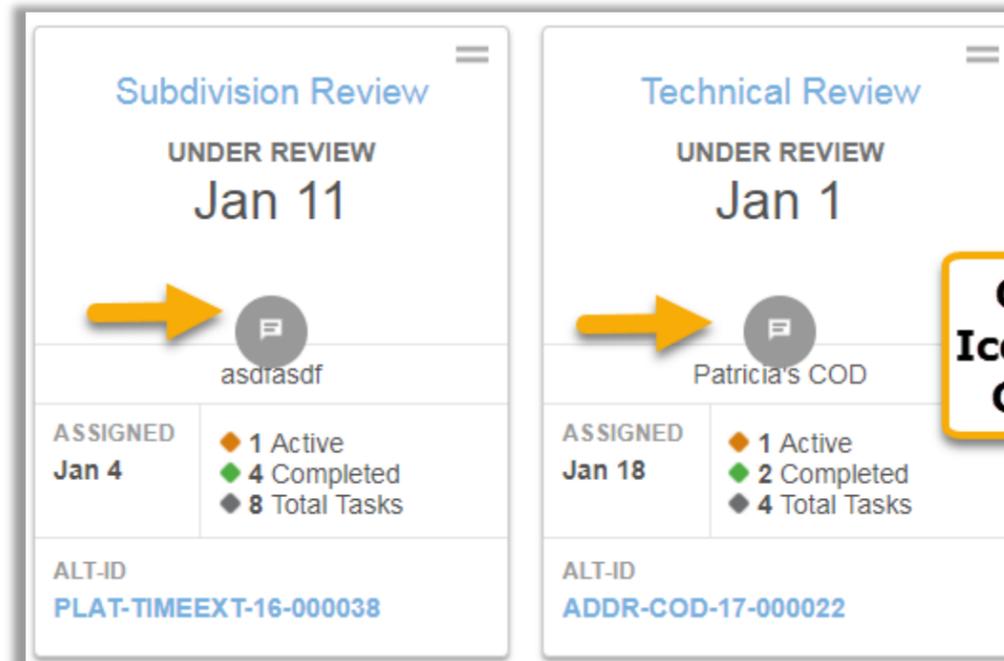
Indicates a hold status is in place. Holds stop actions that would progress the record forward: payment, editing record components, adding activities. The *Custom fields* and *Record details* may still be corrected or modified.



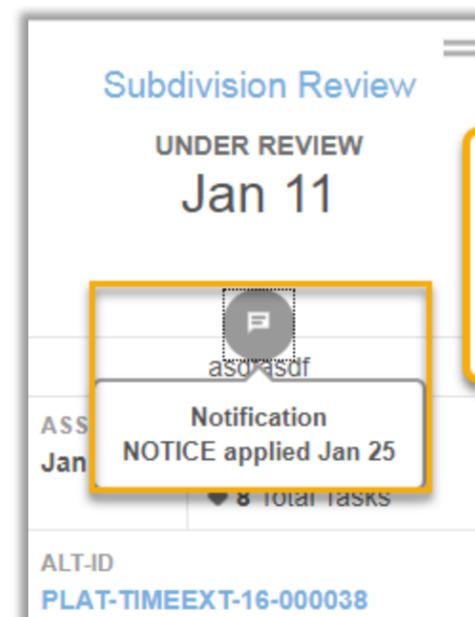
Indicates a notice (special instruction) is available. Notices are purely informational.

When you see one of these icons, simply click on it to learn more about the reason it is in place.

Condition Icons Display on Task Card View



**Condition
Icons on Task
Card View**



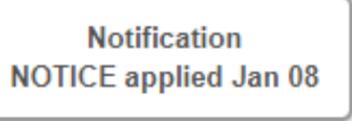
**Click
Condition
Icon for
information.**

Condition Icons Display on List View

Showing 10 task(s)

<input type="checkbox"/>	Task Item	Due Date	Flags	Status	Application Name	Details
<input type="checkbox"/>	Preliminary Plan Review	7:00 AM				LOCATION
<input type="checkbox"/>	LAND-PLAT-16-000015					
<input type="checkbox"/>	Subdivision Review PLAT-TIMEEXT-16-000038	Jan 11	 1	Under Review	asdfasdf	
<input type="checkbox"/>	Technical Review ADDR-COD-17-000022	Jan 1	 1	Under Review	Patricia's COD	

Condition Icons on List View.

Technical Review ADDR-COD-17-000022	Jan 1	 1	Under Review	Patricia's COD	
test	8:00 AM Nov 28	 Notification NOTICE applied Jan 08	DURATION 1 HR		LOCATION Board Room
Zoning Commission	7:00 AM		DURATION 1 HR		LOCATION

Click Condition Icon for information.

Condition Banner displays across the top of Record pages if a Condition is added to that Record

The screenshot displays a web application interface for a record with ID ZONING-Z-2016-000047. On the left is a navigation sidebar with options: Record, Summary, Workflow (highlighted), Workflow History, Documents, Address, Parcel, GIS, and Contacts. The main content area is titled 'Workflow Tasks' and features a light blue banner with a warning icon and the text: 'This record was placed on HOLD on 2018-02-13. Condition: Hold : Administrative Hold Severity: Hold Total conditions: 2 (Hold: 1, Notice: 1)'. Below this text is a link that says 'Learn more about this hold and how to resolve it'. A yellow callout box with an arrow points to the banner, containing the text: 'Condition Notice displays on Record. Click to view.' In the top right corner of the banner area, there is a 'VIEW HISTORY' link. Below the banner, there are two task items: 'Completed Task' and 'Up Next', each with a circular icon and a vertical line indicating progress.

Condition Severity Levels

Lock	Hold	Notice
<p>A lock condition prevents user from performing certain operations on locked records. These operations include:</p>	<p>A hold condition prevents user from performing certain operations. These operations include:</p>	<p>The notice condition indicates special instructions to the person who completes the record. User can associate a message, or notice with a record. Notices do not inhibit the record process in any way.</p>
<ul style="list-style-type: none"> • Cannot schedule or update inspections. • Cannot process fees or do cashiering functions. • Cannot process workflow tasks. • Cannot edit the record status, additional information, record-specific information, or renewal information. 	<ul style="list-style-type: none"> • Cannot schedule or update inspections. • Cannot process fees or do cashiering functions. • Cannot process workflow tasks. 	<ul style="list-style-type: none"> • The notice condition lets user associate a message with an address, owner or parcel.

Reference Addresses

Applying a Condition to a Reference Address

The screenshot displays a software interface with three main sections. On the left is a navigation sidebar with a search icon and a grid icon (marked with a red circle '1'). The top section is titled 'Your Pages' and contains a 'Record' card with a star icon. The middle section is titled 'Recent' and contains a list of records with IDs such as 'PLAT-TIMEEXT-16-...', 'LAND-PUD-16-000...', 'LAND-PUD-16-000...', 'LAND-PUD-16-000...', 'LAND-PUD-17-000...', 'LAND-PUD-16-000...', 'LAND-PUD-16-000...', 'LAND-PLAT-16-000...', 'ZONING-Z-2016-00...', and '18TMP-000714'. The right section is a vertical menu with items: 'Address' (highlighted with a yellow box and marked with a red circle '2'), 'Parcels', 'Owners', 'Assets', 'Contacts', and 'Professionals'. At the bottom left, there is an 'All Pages' section with an upward arrow.

Addresses Search Page displays

Addresses

Enable Soundex Search

Address Type
--Select--
--Select--
Accessory Address
Preliminary Address
Primary Address
Secondary Address

Click Address Type drop-down menu to select Address Type.

Street Name 

Street Type

Post Direction

Unit/Suite

Zip Code

Searching for Reference Data Address

Addresses **4**

Enable Soundex Search

Address Type **1**
Primary Address ▼

Street # **2** 1901 Pre Direction --Select- ▼ Street Name **3** Alamo Street Type --Select- ▼ Post Direction --Select- ▼

Unit/Suite Zip Code

BuildSA Returns All Matches

Addresses

Menu Search GIS Help

Type

Primary Address

Click on Street # hyperlink to display Address Detail page.

Street #	Pre Direction	Street Name	Street Type	Post Direction	Unit/Suite	Zip
1901	S	ALAMO	ST			78204

Address Detail Page Displays

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Help

Address Detail

Address Type

Parcel

Conditions

District

Record List


Navigation Bar

Street #	Pre Direction	Street Name	Street Type	Post Direction
1901	S	ALAMO	St	

Unit/Suite	Building	Level

City	State	Zip Code
City of San Antonio	TX	78204

Description

X Coordinate	Y Coordinate	Plat
2127152.5	1.3697755E7	

Lat	Long	Status
29.412208	-98.501657	Active

Validated
true

This is the Address Detail page.

Click the Conditions Tab to display Conditions Assigned to Reference Address

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu ▾ **New** Delete Help

The Conditions Page displays. Click New.

Conditions

- Address Detail
- Address Type
- Parcel
- District
- Record List

<input type="checkbox"/>	Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
<input type="checkbox"/>	Expedited Case	Condition Met	Default	Expedite		02/09/2017		

Click New



Click the Standard Condition hyperlink to create a condition and configure the workflow correctly.

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Submit Reset Cancel Help

Conditions

Address Detail
Address Type
Parcel
District
Record List

Type * **Standard Condition**
--Select--

Severity
--Select--

Effective Date
[Calendar Icon]

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

Action by User **Current User**
--Select--

Resolution Action
[Text Area]
check spelling

Priority
--Select--

BuildSA uses pre-set conditions that must be selected using the Standard Condition hyperlink. If a condition is chosen not using this link, the work flows of the Records associated with this Reference Address Condition may not work as intended.

Status Date
[Text Field] [Calendar Icon]

Condition Name *
[Text Field]

Expiration Date
[Text Field] [Calendar Icon]

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

Long Comments **Standard Comment**
[Text Area]
check spelling

Public Display Message
[Text Area]
check spelling

Additional Information **Standard Comment**
Arial 1 (8 pt) [Rich Text Editor]
[Text Area]
check spelling

Status
Applied(Applied)

Applied Date
02/12/2018 [Calendar Icon]

Short Comments **Standard Comment**
[Text Area]
check spelling

Action by Dept **Current Department**
--Select--

Include in Condition Notice
 Condition Name
 Short Comments

Display Notice
 Accela Automation
 ACA
 ACA Fee Estimate Page

The Condition Selection Page Displays

Addresses

Submit Reset Cancel Help

Conditions

Address Detail

Address Type

Parcel

District

Record List

Click to select a Condition.

Condition Name

Short Comments

check spelling

Condition Type: --Select--

Severity: --Select--

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

← Addresses

Submit Reset Cancel Help

Conditions

Address Detail

Address Type

Parcel

District

Record List

Condition Type
Notice ▼

Severity
--Select-- ▼

Condition Name

Short Comments

check spelling

Click Submit.

❖ ***IMPORTANT: Do not select Severity from this page.***

← Addresses

Menu ▾ Search Cancel Help

Conditions

Address Detail

Address Type

Parcel

District

Record List

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

 **Click on Condition Icon to select Condition.**

Selected Condition displays on Conditions Page.

Click on Condition Icon to select the Condition. 

Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Submit Reset Cancel Help

Conditions

Address Detail

Address Type

Parcel

District

Record List

Type * **Standard Condition**
Notice

Severity
Notice

Effective Date
02/12/2018

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

Action by User **Current User**
--Select--

Resolution Action

Priority
--Select--

Status Date

Condition Name *
Notification

Expiration Date

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

Long Comments **Standard Comment**

Public Display Message

Additional Information **Standard Comment**
Arial 1 (8 pt)

Rich text editor area

Status
Applied(Applied)

Applied Date
02/12/2018

Short Comments **Standard Comment**
Email/SMS Notification

Action by Dept **Current Department**
--Select--

Include in Condition Notice
 Condition Name
 Short Comments

Display Notice
 Accela Automation
 ACA
 ACA Fee Estimate Page

The Conditions Page displays once again. Note that some of the information is populated.

Use calendar icons to select dates. Type other information as applicable.

The Conditions Page displays once again. Complete fields as necessary. Click Submit.

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu ▾ New Delete Help

Conditions

- Address Detail
- Address Type
- Parcel
- District
- Record List

<input type="checkbox"/>	Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
<input type="checkbox"/>	Notification	Applied	Default	Notice	Notice	02/12/2018	02/12/2018	
<input type="checkbox"/>	Expedited Case	Condition Met	Default	Expedite		02/09/2017		

New Condition displays on Conditions Page.

Record ID: LAND-PLAT-16-000158

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

Conditions of Approval

Fee

Assess Fee History

Payment

Payment History



A notice was added to this record on 2018-02-12.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu

Save

Reset

Summary

Help

ALT ID

LAND-PLAT-16-000158

Record Type

LandDevelopment/Land Entitlement/Plat/Minc

Initiated by Product

AV360

Status

Under Review

Opened Date

11/15/2016



Expiration Date

11/15/2016

Balance

0.00

Short Notes

Application Name

Larry's pad

Record ID

16CAP-00000-00995

Note: This record uses the reference Address to which Condition was added. Note the Condition displays.

Newly created records that use the reference Address will also show the active Condition notice.

Removing Reference Address Conditions

The screenshot displays a software interface with a dark blue sidebar on the left and a main content area. The sidebar contains a search icon, a grid icon (labeled with a red circle '1'), and a dark blue bar at the bottom. The main content area is divided into three sections: 'Your Pages' with a '+ New' button and a 'Record' card; 'Recent' with a 'Clear All' button and a list of records; and a right-hand navigation menu with a yellow box around the 'Address' option (labeled with a red circle '2') and other options like 'Parcels', 'Owners', 'Assets', 'Contacts', and 'Professionals'.

Recent	Clear All
PLAT-TIMEEXT-16-...	Address
LAND-PUD-16-000...	Parcels
LAND-PUD-16-000...	Owners
LAND-PUD-16-000...	Assets
LAND-PUD-17-000...	Contacts
LAND-PUD-16-000...	Professionals
LAND-PUD-16-000...	
LAND-PLAT-16-000...	
ZONING-Z-2016-00...	
18TMP-000714	

The Addresses Search Page Displays

Addresses

Enable Soundex Search

Address Type
Primary Address ▼

Street # Pre Direction Street Name Street Type Post Direction

Unit/Suite Zip Code

Type Address information. Click Submit.

BuildSA Returns All Matches

Addresses

Menu Search GIS Help

Type

Primary Address

Click the **Street #** hyperlink to display Address Detail page.

Street #	Pre Direction	Street Name	Street Type	Post Direction	Unit/Suite	Zip
1901	S	ALAMO	ST			78204

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu ▾ New Delete Help

Conditions

Address Detail

Address Type

Parcel

District

Record List

<input type="checkbox"/>	Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
<input type="checkbox"/>	Notification	Applied	Default	Notice	Notice	02/12/2018	02/12/2018	
<input type="checkbox"/>	Expedited Case	Condition Met	Default	Expedite		02/09/2017		

From the Navigation bar, click on the Conditions Tab. All Conditions associated with the Reference Address display.

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu ▾ New Delete Help

<input type="checkbox"/>	Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
<input checked="" type="checkbox"/>	Notification	Applied	Default	Notice	Notice	02/12/2018	02/12/2018	
<input type="checkbox"/>	Expedited Case	Condition Met	Default	Expedite		02/09/2017		

**Click the box to the left of the Condition you want to delete.
Click the Delete button. *Note: Conditions are not deleted, they become inactive.***

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu ▾ New Delete Help

Notice that the Condition remains listed on the page for historical referencing. It is read-only.

1 record(s) deleted successfully.

<input type="checkbox"/>	Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
<input checked="" type="checkbox"/>	Notification	Applied	Default	Notice	Notice	02/12/2018	02/12/2018	
<input type="checkbox"/>	Expedited Case	Condition Met	Default	Expedite		02/09/2017		

Conditions

- Address Detail
- Address Type
- Parcel
- District
- Record List

**BuildSA displays a 1 record(s) deleted successfully message.
Click the Refresh button.**



Record ID: LAND-PLAT-16-000158

Menu Save Reset Summary Help

ALT ID: LAND-PLAT-16-000158 Record Type: LandDevelopment/Land Entitlement/Plat/M

Status: Under Review Opened Date: 11/15/2016 Expiration Date: 11/15/2016 0.00

Short Notes

Application Name: Larry's pad Record ID: 16CAP-00000-00995

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

GIS

Contacts

Custom Fields

Custom Lists

Inspections

Conditions

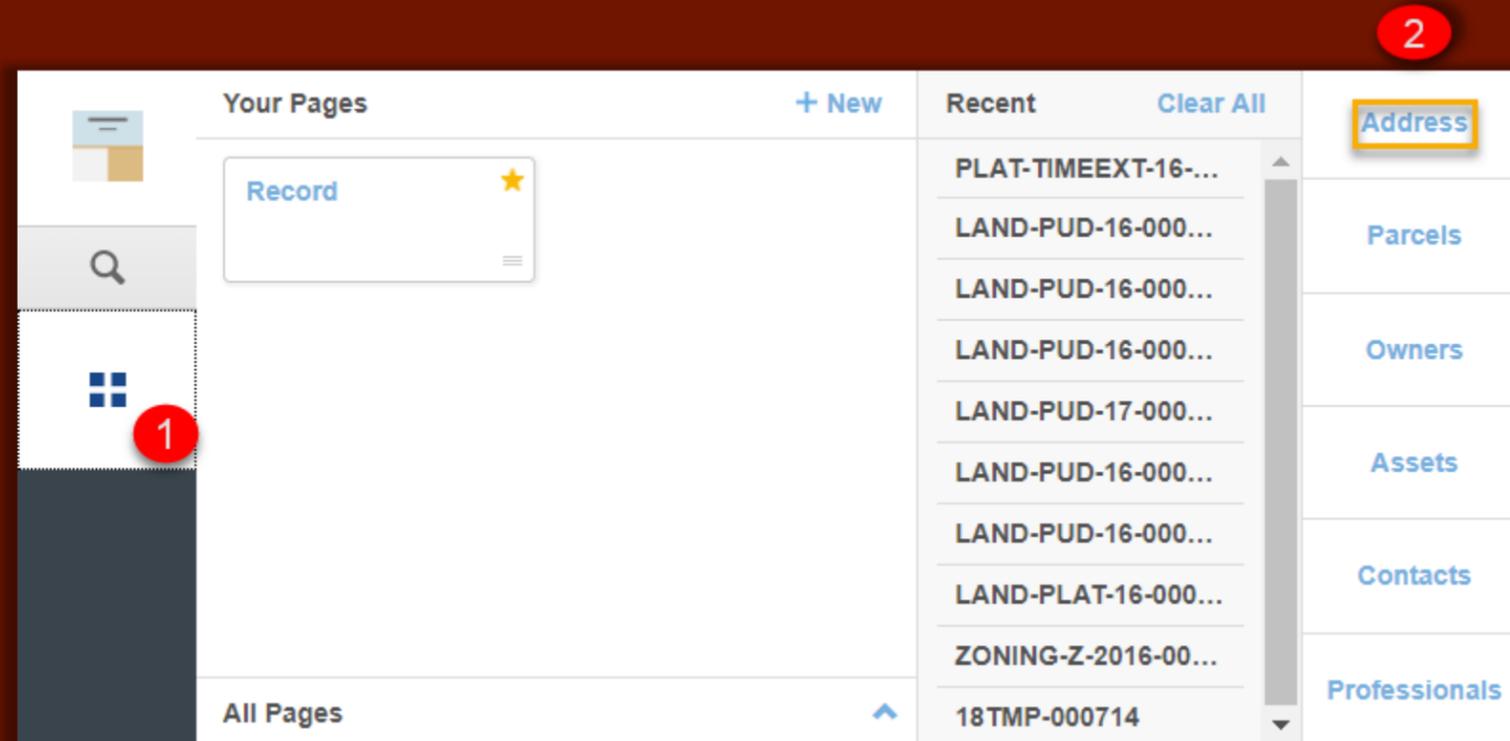
Conditions of Approval

The Condition banner does not appear on associated Records after the Condition is deleted.

The Condition is removed from all records associated with the Reference Address.

Editing a Condition made to a Reference Address

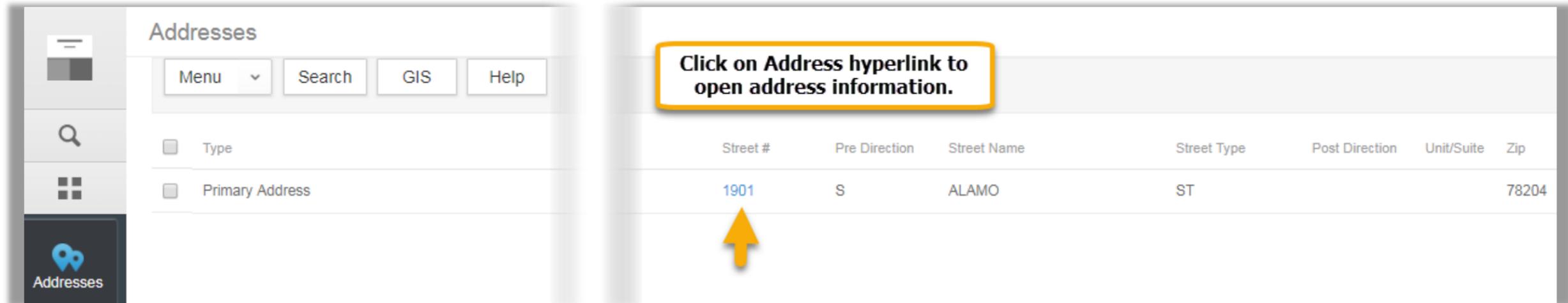
Retrieve Reference Address



Submit Addresses Form that Displays

A screenshot of an 'Addresses' form. At the top, there are buttons for 'Submit' (4), 'Reset', 'Cancel', and 'Help', along with an 'Enable Soundex Search' checkbox. Below these is a dropdown for 'Address Type' set to 'Primary Address' (1). The form has several input fields: 'Street #' with the value '1901' (2), 'Pre Direction' with a '--Select--' dropdown, 'Street Name' with the value 'alamo' (3), 'Street Type' with a '--Select--' dropdown, and 'Post Direction' with a '--Select--' dropdown. At the bottom, there are empty input fields for 'Unit/Suite' and 'Zip Code'. A yellow callout box (5) contains the text: 'Type known information on Address Search form. Click Submit.'

BuildSA Returns All Matches



Addresses

Menu Search GIS Help

Type

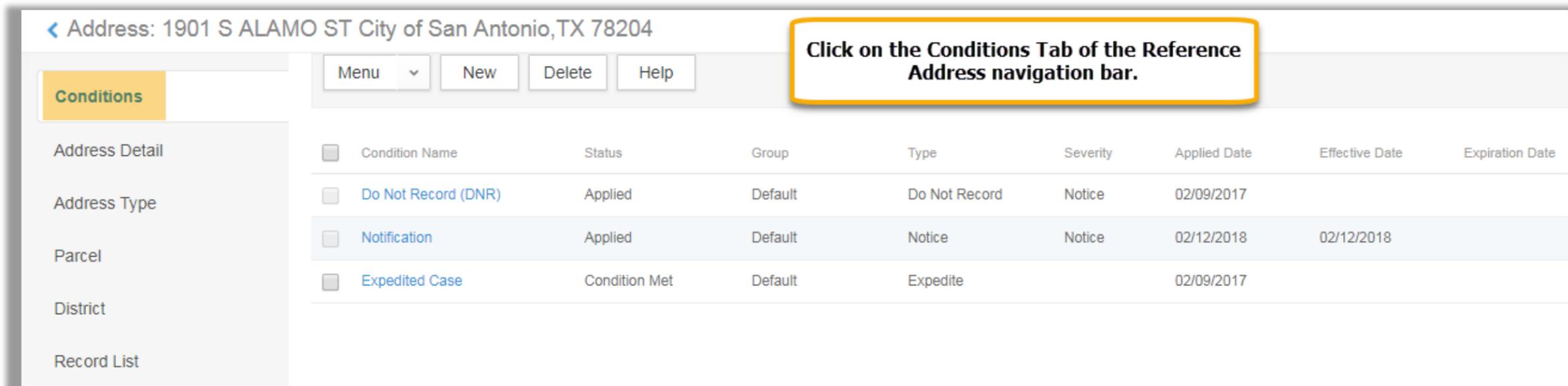
Primary Address

Addresses

Click on Address hyperlink to open address information.

Street #	Pre Direction	Street Name	Street Type	Post Direction	Unit/Suite	Zip
1901	S	ALAMO	ST			78204

Click the Conditions Tab



Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu New Delete Help

Click on the Conditions Tab of the Reference Address navigation bar.

Conditions

- Address Detail
- Address Type
- Parcel
- District
- Record List

Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
Notification	Applied	Default	Notice	Notice	02/12/2018	02/12/2018	
Expedited Case	Condition Met	Default	Expedite		02/09/2017		

Conditions

Address Detail

Address Type

Parcel

District

Record List

Menu

<input type="checkbox"/>	Condition Name	Status	Group	Type	Severity	Applied Date	Effective Date	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	Do Not Record	Notice	02/09/2017		
<input type="checkbox"/>	Notification	Applied	Default	Notice	Notice	02/12/2018	02/12/2018	
<input type="checkbox"/>	Expedited Case	Condition Met	Default	Expedite		02/09/2017		

Click the Condition Name hyperlink that you want to edit.

Condition Detail

Submit Reset Cancel Help

Condition History

Type * Expedite

Status Date 02/09/2017

Effective Date

Applied by Dept * Current Department
Land Entitlements Admin Support

Action by User Current User
--Select--

Resolution Action
check spelling

Priority
--Select--

The Condition Detail page displays. Edit as necessary. Click Submit.

Condition Name * Expedited Case

Severity
--Select--

Expiration Date

Applied by User * Current User
Patricia Rosas

Long Comments Standard Comment
check spelling

Public Display Message
check spelling

Additional Information Standard Comment
Arial 1 (8 pt) B I U

check spelling

Status
Condition Met(Not Applied)

Applied Date
02/09/2017

Short Comments Standard Comment
Expedited Case
check spelling

Action by Dept Current Department
--Select--

Include in Condition Notice
 Condition Name
 Short Comments

Display Notice
 Accela Automation
 ACA
 ACA Fee Estimate Page

Edit Condition Detail as necessary. Click Submit.

← Address: 1901 S ALAMO ST City of San Antonio, TX 78204

Menu ▾ New Delete Help

Conditions

Address Detail

Address Type

Parcel

District

1 record(s) deleted successfully.

<input type="checkbox"/>	Condition Name	Status	Group	Expiration Date
<input type="checkbox"/>	Do Not Record (DNR)	Applied	Default	
<input type="checkbox"/>	Notification	Applied	Default	
<input type="checkbox"/>	Expedited Case	Condition Met	Default	02/22/2018

BuildSA generates a message indicating modifying of Condition was successful.

Congratulations!

This concludes Module Seven

Working with Reference Data and Conditions

Addresses

It is time to test your recall.....

TEST YOUR RECALL

1. A condition is a requirement that may be applied to a Reference Address.
 True False
2. The user is given the option whether to display a Condition banner on a Record in BuildSA. True False
3. Condition must be selected by clicking on the Standard Condition hyperlink in the Conditions form. True False
4. A Condition not selected by clicking on the Standard Condition hyperlink may not appropriately configure the workflow of the Record. True False.

Answers on the next slide...



**YOU'RE SUCH A
WINNER!**

If you answered:

1. True
2. False
3. True
4. True

You are correct!

Time to begin the next
module...

Organization Change Management Team Contact Information

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