

***On-line Tutorial Series***

***Module Five***

***Record Search***

# **Record Search Options**

**1. Record Search Page**

**2. Global Search**

**3. Recent Records List**

# Using Record Search Page Option 1

**1. Launchpad (#1) → All Pages (#2) → Filter for Record (#3) → click Record hyperlink (#4)**

The screenshot displays the Accela Civic Platform interface for user Patricia. The breadcrumb trail is "Accela Civic Platform > COSA". The main heading is "Welcome, Patricia" with a notification "You have 61 Tasks" and a refresh icon. A "FILTER P" button is visible in the top right. The interface is divided into several sections:

- Launchpad (#1):** A vertical sidebar on the left contains icons for home, search, and a grid of application tiles. The grid icon is highlighted with a red circle containing the number 1.
- YOUR PAGES (#2):** A section with two tabs: "YOUR PAGES" and "ALL PAGES". The "ALL PAGES" tab is selected and highlighted with a red circle containing the number 2.
- Search (#3):** A search bar on the right contains the text "rec" and is highlighted with a red circle containing the number 3.
- RECORD LISTS (#4):** A section titled "RECORD LISTS" containing a list of record identifiers. The first item, "★ Record", is highlighted with a red circle containing the number 4.

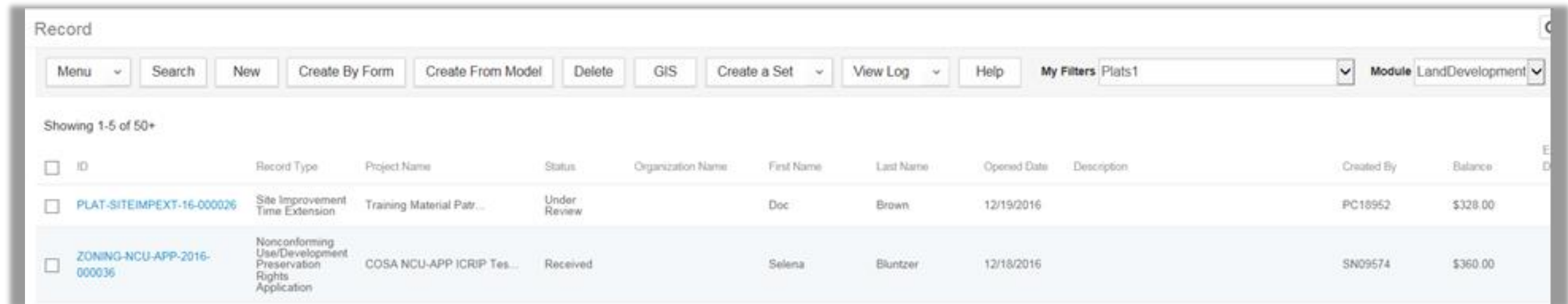
**CREATE NEW RECORD**

**Recent** Clear

- FIR-FSP-APP20-22500836
- ADDR-AVAA-20-10100003
- ADDR-AVAA-20-10100002
- SIG-ENT-PMT20-21100057
- SIG-PMT-APP20-20800929
- SIG-PMT-APP20-20800745
- SIG-PMT-APP20-20800916
- SIG-PMT-REN20-219001...
- SIG-PMT-APP20-20800917

# Using Record Search Page

## 2. Record Search Page displays.



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+

<input type="checkbox"/>	ID	Record Type	Project Name	Status	Organization Name	First Name	Last Name	Opened Date	Description	Created By	Balance
<input type="checkbox"/>	<a href="#">PLAT-SITEIMPEXT-16-000026</a>	Site Improvement Time Extension	Training Material Patr...	Under Review		Doc	Brown	12/19/2016		PC18952	\$328.00
<input type="checkbox"/>	<a href="#">ZONING-NCU-APP-2016-000036</a>	Nonconforming Use/Development Preservation Rights Application	COSA NCU-APP IC RIP Tes...	Received		Selena	Bluntzer	12/18/2016		SN09574	\$360.00

Accela Civic Platform > COSA

Record **2**

Menu Search New Create By Form

Showing 1-5 of 50+

<input type="checkbox"/>	First Name	ID	Record Type	Record Name
<input type="checkbox"/>		LAND-CONTACT-13111	Contact Information	
<input type="checkbox"/>	Larry	ADDR-AVAA-20-10100003	Address Verification and Assignment	Odis
<input type="checkbox"/>	Zayan	LAND-PLAT-20-11800005	Minor Plat	Yusuf
<input type="checkbox"/>	Larry	ADDR-AVAA-20-10100002	Address Verification and Assignment	Odis
<input type="checkbox"/>		LAND-CONTACT-11969	Contact Information	

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PR

Help My Filters **1** Module LandDevelopment

- Select--
- Additional Information Required
- Addressing
- Board of Adjustment
- Land Entitlement
- MDP
- Nonconforming Use/Zoning Verification
- Plats
- PUD
- Vested Rights
- Zoning

<input type="checkbox"/>	First Name	Last Name	Date	Record Name
<input type="checkbox"/>		Odis	02/28/2020	
<input type="checkbox"/>		Yusuf	02/28/2020	
<input type="checkbox"/>		Odis	02/27/2020	
<input type="checkbox"/>			02/26/2020	

**3. Option to use a filter to set parameters for searches (#1).**

**4. Click Search (#2).**

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: 03/18/1970 To: 03/05/2020

Record ID:

Status: --Select--

Current Workflow Task: --Select--

Current Workflow Status: --Select--

Last Name:

E-mail:

Street Name:

Street Type: --Select--

City Parcel Number:

Legal Description:  [check spelling](#)

Custom Fields Value:

Custom Lists Field Name:

Custom Lists Field Value:

Search by Condition

Condition Name:

Condition Status:

**5. Use drop-down arrows or date range to refine search (sample drop-down shown).**

**6. Click Submit.**

# Refine Search Option

- **If the system does not find a match, a 0 record(s) found message displays. The menu bar then displays the Refine Search button.**

The screenshot displays the BuildSA interface. On the left, a 'Record' menu bar contains buttons for 'Menu', 'Refine Search', 'New', 'Create By Form', 'Create From Model', 'Delete', and 'GIS'. The 'Refine Search' button is highlighted with a yellow box. Below the menu bar, a table header shows columns for 'ID', 'Record Type', 'Project Name', 'Status', and 'Organization'. A message below the table reads '0 record(s) found.' A yellow box highlights this message with the text: 'If a match is not found, BuildSA displays a **0 record(s) found message.**' On the right, a 'Module' dropdown menu is set to 'LandDevelopment'. Below it, a table header shows columns for 'Created By', 'Balance', 'Expiration Date', and 'Related Records'.

Record

Menu ▾ Refine Search New Create By Form Create From Model Delete GIS Create a Set ▾ View Log ▾ Help My Filters --Select-- ▾ Module LandDevelopment ▾

Showing 1-3 of 3

<input type="checkbox"/>	ID	Record Type	Project Name	Status	Organization Name	First Name	Last Name	Opened Date	Description	Created By	Balance	Expiration Date	Related Records
<input type="checkbox"/>	<a href="#">LAND-PUD-18-000012</a>	Planned Unit Development (PUD)	PUD Expiration Date Testing	Under Review		Patricia	Cavazos	01/21/2018		PC18952	\$910.00	01/21/2018	<a href="#">View</a>
<input type="checkbox"/>	<a href="#">LAND-PUD-18-000002</a>	Planned Unit Development (PUD)	Patricia's PUD Paid BO	Under Review		Patricia	Cavazos	01/09/2018		PC18952	\$0.00	01/09/2018	<a href="#">View</a>
<input type="checkbox"/>	<a href="#">17TMP-000151</a>	Planned Unit Development (PUD)	Review of Review 2			Patricia	Cavazos	03/02/2017		PUBLICUSER10	\$0.00		

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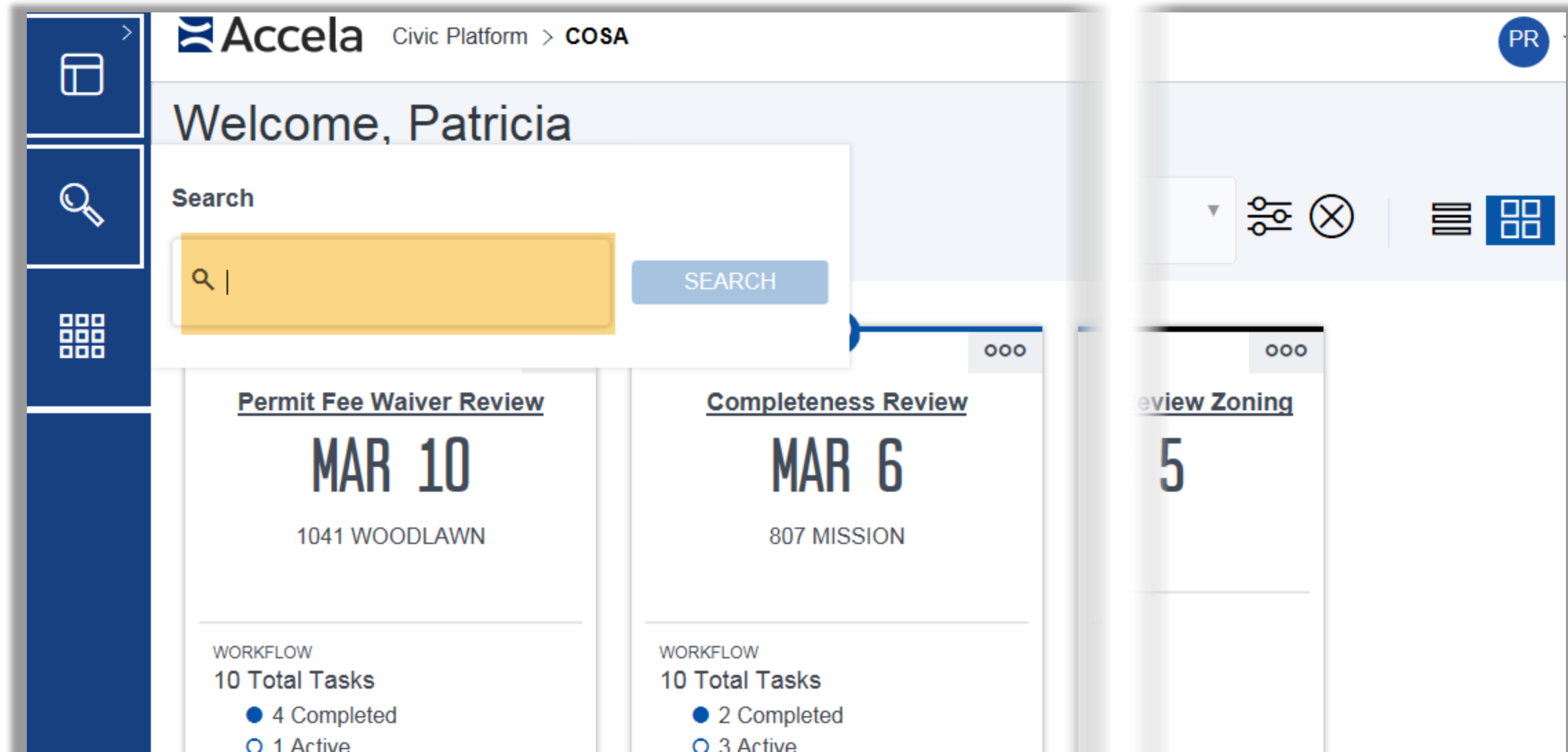
**7. BuildSA returns all matches for the Record Type and Contact name.**

**8. Click Record ID hyperlink to open Record.**



## Global Search Option 2

1. From the Home Page, click the Global Search icon.
2. Search by contact, address, email, record type, record ID, parcel, project name, etc.
3. Click the Search button. BuildSA returns all matches.



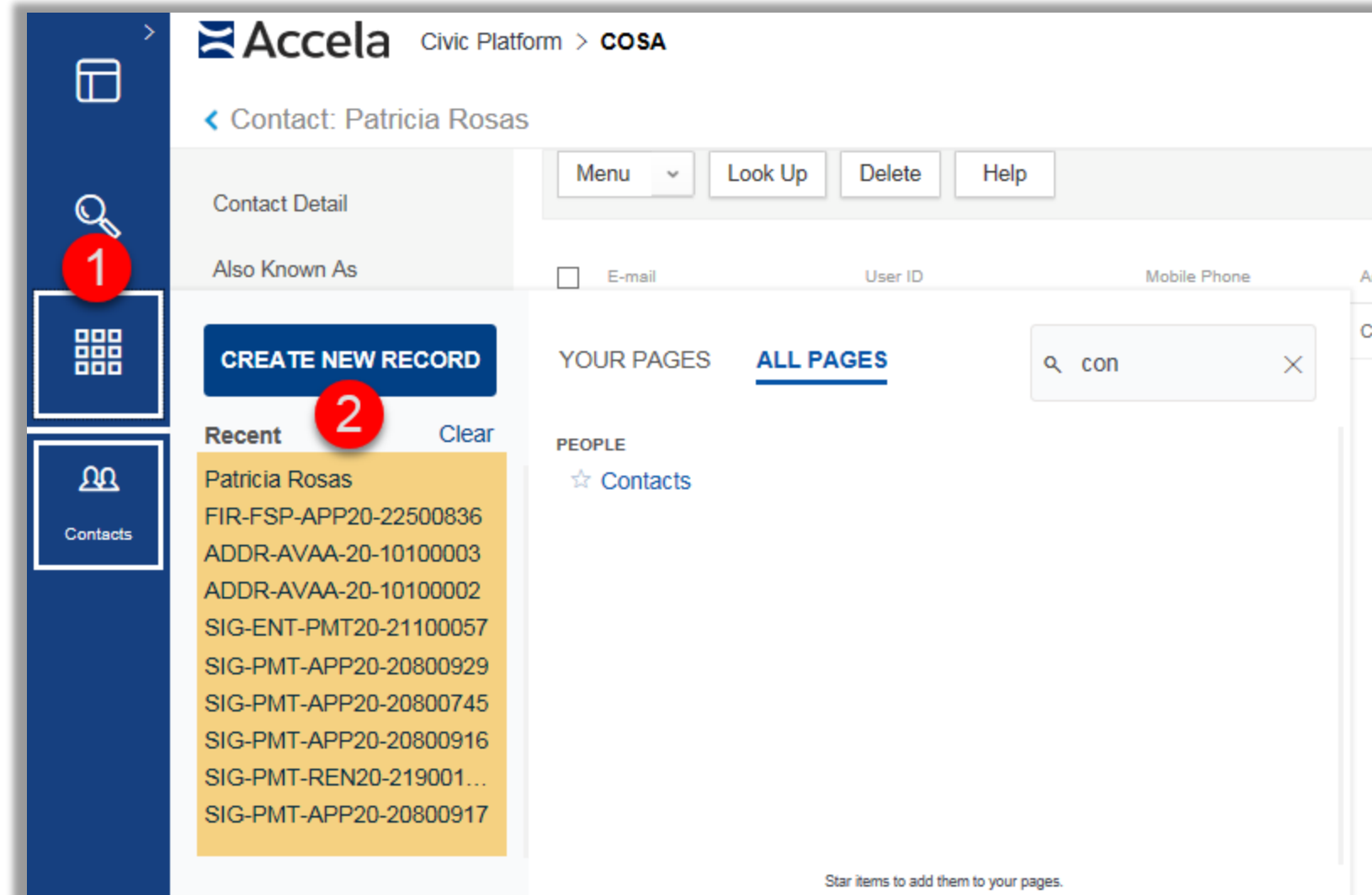
The screenshot displays the Accela Civic Platform interface for COSA. The top navigation bar includes the Accela logo, "Civic Platform > COSA", and a user profile icon labeled "PR". Below the navigation bar, a welcome message reads "Welcome, Patricia". A search bar is prominently displayed, with a magnifying glass icon on the left and a "SEARCH" button on the right. The search bar is currently empty. Below the search bar, three workflow cards are visible:

- Permit Fee Waiver Review**: Scheduled for **MAR 10** at **1041 WOODLAWN**. The workflow shows 10 Total Tasks, with 4 Completed and 1 Active.
- Completeness Review**: Scheduled for **MAR 6** at **807 MISSION**. The workflow shows 10 Total Tasks, with 2 Completed and 3 Active.
- Review Zoning**: Scheduled for **5**.

The interface also features a left-hand navigation menu with icons for home, search, and a grid of applications. The top right corner contains a dropdown menu, a refresh icon, a close icon, and a grid icon.

# Recent Records List Option 3

1. Launchpad (#1) → Recent Records List (#2).



**The Recent Records List displays last pages accessed. Click on a listed page to open. As more pages are opened, the list updates.**

***Congratulations!***

***This concludes Module Five***

***Record Search***

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

## TEST YOUR RECALL

1. The Home Page is an access point to search for records.  True  False
2. The Record Page is one option to search for records.  True  False
3. The Record Page is located on a task card.  True  False
4. Global Search searches for Addresses, Contacts, Owners, Parcels and Records.  True  False
5. If erroneously cleared, the Recent Records list is retrievable.  True  False.

***Answers on the next slide...***



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

Time to begin  
the next  
module...

# **Organization Change Management Team Contact Information**

- **Richard Chamberlin, BuildSA Community Liaison**
- **Patricia Cavazos, Sr. Special Projects Manager**
- **Caryn Moore, Sr. Special Projects Manager**
- **Patricia Rosas, Training Lead and Curriculum Developer**
- **Jaclyn Corona, Management Analyst**
- **Josh Garcia, Supervisor**