

On-line Tutorial Series

Module Seven

Records and Conditions

Creating Conditions

With questions about Conditions or how they impact the workflow process, please see your supervisor or BuildSA Change Agent.

Record ID: ZONING-ZV-2017-000050

Menu New Reorder Delete Help

Display Order	Condition Name	Group	Type	Severity	Applied by Dept	Expiration Date	Object Name	Object Value
0 record(s) found.								

Inspections

Conditions 1

1. Retrieve the Record.

2. From the Record's navigation bar, click the Conditions Tab.

3. Click New to display the Conditions page.



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

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

Record ID: ZONING-ZV-2017-000050

Submit Reset Cancel 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
Payment History
Communications
Meetings
Owner

Condition Name *
Type * **Standard Condition** Severity --Select--
Applied Date 02/21/2018 Effective Date Expiration Date Inheritable * --Select--
Status Applied(Applied) Status Date
Action by Dept Current Department Action by User Current User
Applied by Dept * Current Department Applied by User * Current User
Public Display Message
Short Comments **Standard Comment**
Long Comments **Standard Comment**
Resolution Action

Display Notice
 Accela Automation
 ACA
 ACA Fee Estimate Page

Include in Condition Notice
 Condition Name
 Short Comments

Priority --Select--

The Condition Type page displays.

ZONING-ZV-2018-000399

Submit Reset Cancel Help

Record

Summary

Workflow

Workflow History

Documents

Address

Parcel

Condition Name

Short Comments

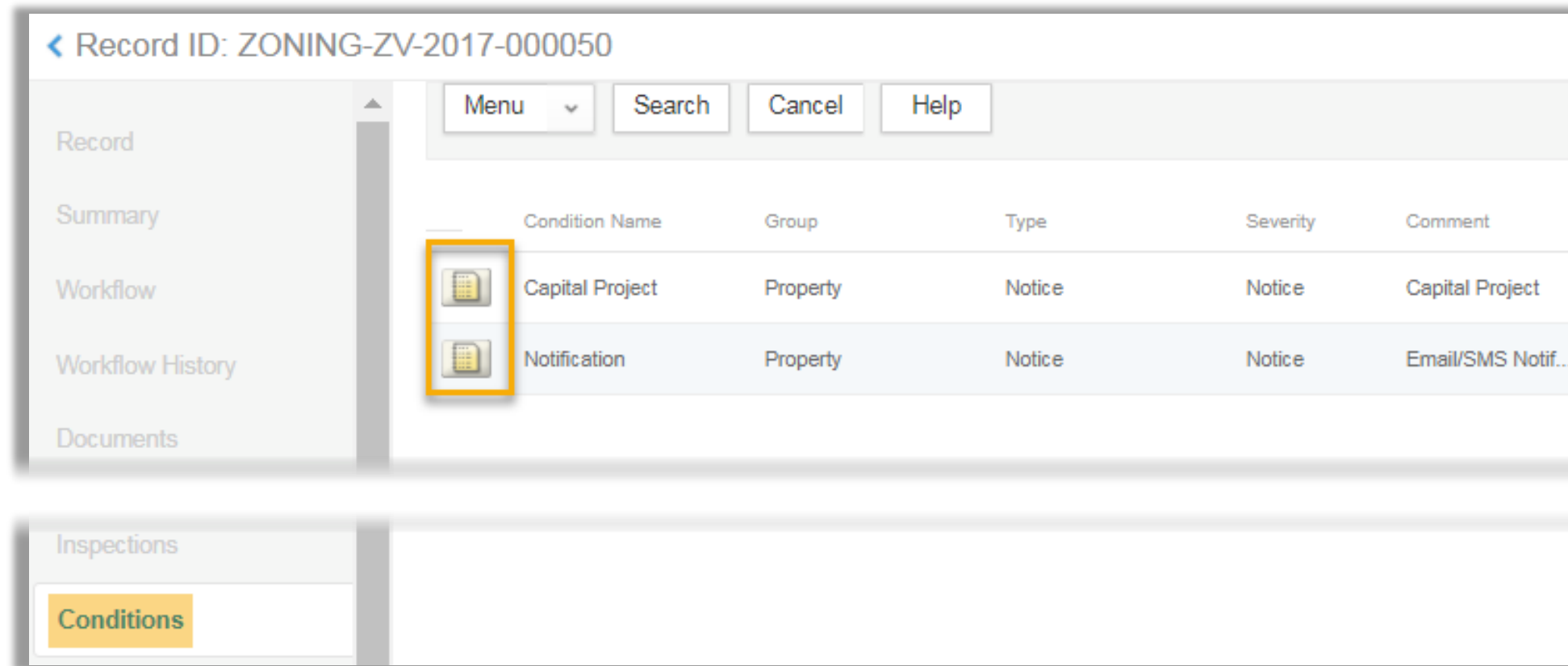
check spelling

Condition Type	Severity
--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	

Inspections

Conditions

4. Click Condition Type drop-down menu to select a Condition. *Note: Do not select Severity level from this page.*



Conditions applicable to the specific Record type display.

5. Make selection by clicking the Condition icon to the left of Condition name.



Record ID: ZONING-ZV-2017-000050

Submit Reset Cancel 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

Payment History

Communications

Meetings

Condition Name * Notification

Type * Standard Condition

Severity Notice

Applied Date 02/21/2018

Effective Date

Expiration Date

Inheritable * No

Status Applied(Applied)

Status Date

Display Notice

Accels Automation

ACA

ACA Fee Estimate Page

Include in Condition Notice

Condition Name

Short Comments

Priority --Select--

Action by Dept Current Department

Action by User Current User

Applied by Dept * Current Department

Applied by User * Current User

Land Entitlements Admin Supr

Patricia Rosas

Public Display Message

check spelling

Short Comments Standard Comment

check spelling

Long Comments Standard Comment

check spelling

Resolution Action

check spelling


5. Condition page displays. Note the pre-populated fields. Edit, if necessary.

6. Ensure Current User displays your name.

7. Click Submit.

Condition banner displays across the top of all of the Record's pages.

Record ID: ZONING-ZV-2017-000050

 A notice was added to this record on 2018-02-21.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

[View notice](#)

Menu

<input type="checkbox"/>	Display Order	Condition Name	Group	Type	Severity	Applied by Dept	Applied by User	Status	Condition Status Type	Status Date	Applied Date	Effective Date	Expiration Date	Object Name	Object Value
<input type="checkbox"/>		Notification	Default	Notice	Notice	Land Enti...	Patricia Rosas	Applied	Applied		02/21/2018			Record	17CAD-000...

Removing a Condition from a Transactional Record

Inactive Conditions

**As Conditions are removed, they become inactive but are not deleted.
Inactive Conditions remain on the Record for historical referencing.**

Record ID: ZONING-ZV-2017-000050

Record
Summary
Workflow
Workflow History
Documents
Address
Parcel

A notice was added to this record on 2018-02-21.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu New Reorder **Delete** Help

<input type="checkbox"/>	Display Order	Condition Name	Group	Type	Severity	Applied by Dept	Applied by User	Name	Object Value
<input checked="" type="checkbox"/>		Notification	Default	Notice	Notice	Land Enti...	Patricia Rosas		17CAD-000...

Inspections

Conditions 1

- 1. From the Record's navigation bar, click the Conditions Tab.**
- 2. Click the box to the left of the Condition Name you wish to delete.**
- 3. Click Delete.**

Record ID: ZONING-ZV-2017-000050

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
<input type="checkbox"/>		Notification	Default	Notice	Notice	Land Enti...	Patricia Rosas

Inspections

Conditions

Object Name	Object Value
Record	17CAD-000...

4. After clicking Delete, BuildSA displays message 1 record(s) deleted successfully.

5. Note the Condition is now read-only.

Editing Transactional Record Conditions

Record ID: ZONING-ZV-2017-000050

A notice was added to this record on 2018-02-21.
Condition: Notification : Email/SMS Notification Severity: Notice
Total conditions: 1 (Notice: 1)

View notice

Menu New Reorder Delete Help

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

Object Name Object Value

Record	17CAD-000...
Record	17CAD-000...

Inspections

Conditions

- 1. From the Record's navigation bar, click on the Conditions Tab.**
- 2. Click the Condition Name hyperlink.**

Record ID: ZONING-ZV-2017-000050

Submit Reset Cancel Help

Modify fields as applicable.

Condition Detail

Condition History

Condition Name * Notification

Type * Notice

Severity Notice

Applied Date 02/21/2018

Effective Date

Expiration Date

Inheritable * No

Status Applied(Applied)

Status Date

Display Notice

Accela Automation

ACA

ACA Fee Estimate Page

Action by Dept Current Department --Select--

Action by User Current User --Select--

Applied by Dept * Current Department Land Entitlements Admin Supp

Applied by User * Current User Patricia Rosas

Include in Condition Notice

Condition Name

Short Comments

Priority --Select--

Public Display Message

check spelling

Short Comments Standard Comment

check spelling

Long Comments Standard Comment

check spelling

Resolution Action

check spelling

Object Name Record

Object Value 17CAD-00000-00439

3. The Condition Detail page displays. Modify fields as necessary.

4. Click Submit.

Congratulations!

This concludes Module Seven

Transactional Record

Conditions

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

TEST YOUR RECALL

1. Conditions are Record Type specific and pre-configured for DSD workflow processes. True False
1. Conditions that have been deleted may be updated periodically. True False
2. Conditions must be initially selected by using the Standard Condition hyperlink True False

Answers on the next slide...



If you answered:

1. True
2. False
3. True

You are correct!

Time to begin the next
module...

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