Data Dictionary Workgroup
Agenda

• Process Review
• December On Site Meeting & Worksheet
• Commercial PropertySubType
• Ownership / Structure & PropertySubType
• “[type]” Enumerations
• Saved Search, Contacts, Auto Email Relationships
• BOD Priorities
New Submission Process

• Suggestions through Wiki (Current & Draft)
• Posted to Confluence for Discussion
• Managed in Confluence Tasks (admins)
• Utilization from Requestor and Cert. Team
• Tempered Change for Stability
Review Process

• Focus on Stability Around Changes
  – Pre-Discussion on Confluence
  – Utilization from Requestor and Cert. Team
  – Workgroup Meeting
  – Board Approval
Resources

• **members.reso.org/display/DD**
  – Confluence Discussion
  – Links to Wiki (1.5 and 1.6 Draft)

• **ddwiki.reso.org**
  – The current Dictionary (1.5)

• **downloading the DD from 1.5 or 1.6 wiki**
  – Side Menu > DD Introduction > Downloading...
December Enumeration Escapade

- Confluence > DD > Gold Enumeration Worksheet
- December 6th and 7th
- San Dimas, California
Gold Enumeration Worksheet Review

- https://drive.google.com/open?id=0B2qxAOyvpRBxME9jVktVOEx3RWc
Commercial PropertySubType

• Long and Short Lists
• Sub Groups to the Sub Type
• Propose Extendable “Medium List”
  3+ Submissions & Not a Business Type
• Add to PropertySubType
• Individuals Okay to Create a Sub Sub Type
Commercial Property Sub Types

• Agriculture
• Business
• Hotel/Motel
• Industrial
• Mixed Use
• Multi Family
• Office
• Retail
• Unimproved Land
• Warehouse
Ownership & Structure

• Gradual Replacement of Property Sub Type
• Describe Types of Ownership
  – Not ownership structures
    • (Individual, Partnership, Corporation, Trust)
  – Not forms of transfer / financing
    • (Contact for Deed, Right to use, In Acquisition)
• Describe the types of Structures
  – Not styles or architecture
Ownership

It’s either...
Fee Simple (Freehold) or Lease (Leasehold)

But also consider...
Types of Common Interest
Types of Common Interest

RESO’s Prop Sub Type
- Condominium
- Stock Cooperative
- Timeshare

Canada differs on...
↔ Strata
↔ Cooperative

Other Common Interest
- Planned Development
- Community Apartment
- None
One or More Fields?

- Land Lease YN is Established
- Fee Simple is Generic
- Serve Existing Community
Ownership Option 1

Keep existing LandLeaseYN and add new field CommonInterest

- Condominium
- Planned Development
- Community Apartment
- Stock Cooperative
- Timeshare
- None

*LandLeaseYN = No means Fee Simple / Freehold
Ownership Option 2

Deprecate LandLeaseYN and replace with OwnershipType

- Land Fee Simple
- Condominium
- Planned Development
- Community Apartment
- Land Lease
- Stock Cooperative
- Timeshare
Structure Type (or PropertySubType?)

- Single Family Residence
- Manufactured Home
- Townhouse
- Apartment (Condo?)
- Duplex
- Triplex
- Quadruplex
- Boat Slip
- Deeded Parking
- Cabin
- Farm
- Ranch
+ our Commercial list
Structure Options

• Option 1: Create a new Structure Type
  – Eventually deprecate PropertySubType
  – What to do with non structure items? (Parking, Farm, Ranch, Boat Slip)

• Option 2: Keep PropertySubType
  – Only deprecated ownership items
  – Don’t add StructureType
Decision to Enumerate Repeating Elements

- Pretty Easy (one size fits all)
  - Room[type]Level
  - Room[type]LengthWidthSource
  - Room[type]Furnished

- Room[type]Features
  - Features can be different for each type
  - 31 types
  - Tackle the “low hanging fruit?”
Room Types to Enumerate Features

• Bedroom & Bathroom
  – One list, or different lists for rooms 1-5 & master.

• Kitchen

• Other Fields
Saved Search, Contacts and Auto Email Relationships

- [http://members.reso.org/dd](http://members.reso.org/dd)
- ERD 4
ERD 1 – One Contact to Many Saved Searches
ERD 2 – Many Contacts to Many Saved Search
ERD 3 = ERD1 + Auto Email
ERD 4 = ERD 2 + Auto Email

Saved Search
- SavedSearchKey (PK)
- SavedSearchName
- SavedSearchDescription
- etc...

Auto Email (aka, Prospecting)
- SavedSearchKey (PK, FK)
- ContactKey (PK, FK)
- AutoEmailCC
- AutoEmailBCC
- etc...

Contacts
- ContactKey (PK)
- FirstName
- LastName
- Email
- etc...
ERD 5 = ERD 4 + Many Auto Email

- Probably too much...
ERD 4?

- a Contact can have many Saved Searches
- a Saved Search can be reused across Contacts
- a Contact’s Saved Search can be Auto Email
- doesn’t over complicate Auto Email
BOD Priorities for v1.6

- Accessibility
- Showing Data
- Gold Enumerations
- Saved Searches, Carts and Portal Preferences
- Internet Tracking Fields
Accessibility

• Reviewing ADA

• Collecting Enumerations for December Meet
Showing Data

• Not Listing Data, e.g. Showing Instructions
• Schedules and Appointments
• Contacts and Locations
• Vendor Participation
• Why? Portability & Interoperability
• Showing Data Subgroup Volunteers
Gold Enumerations

- 19 Fields
- Worksheet at [http://members.reso.org/dd](http://members.reso.org/dd)
- Map your Enumerations into Sheet
- Email to Rob@crmls.org
- Finalize at Dec 6-7th In Person Meeting
- Also Pending Enums and some Platinum?
Save Search

• Saved Search Resource in v1.3
• Gold Enumerations
• Search Criteria
  – Examples at http://members.reso.org/dd
  – Create Specification
Carts

- Collections of Listings
- Associated Contacts
- Schema Submissions by Jan 31st
Portal Preferences

- Notes on Listings Between Member & Client
- Favorites, Dislikes, etc. on Listings
- Posting Initial Structure on Confluence
  - Contact Key
  - Listing Key
  - Notes Collection
  - Listing Preferences (i.e. Favorite, Discard)
Internet Tracking

- Schema for tracking data portability
- Internet Tracking Workgroup
- Posted on Confluence this Winter
Q & A

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