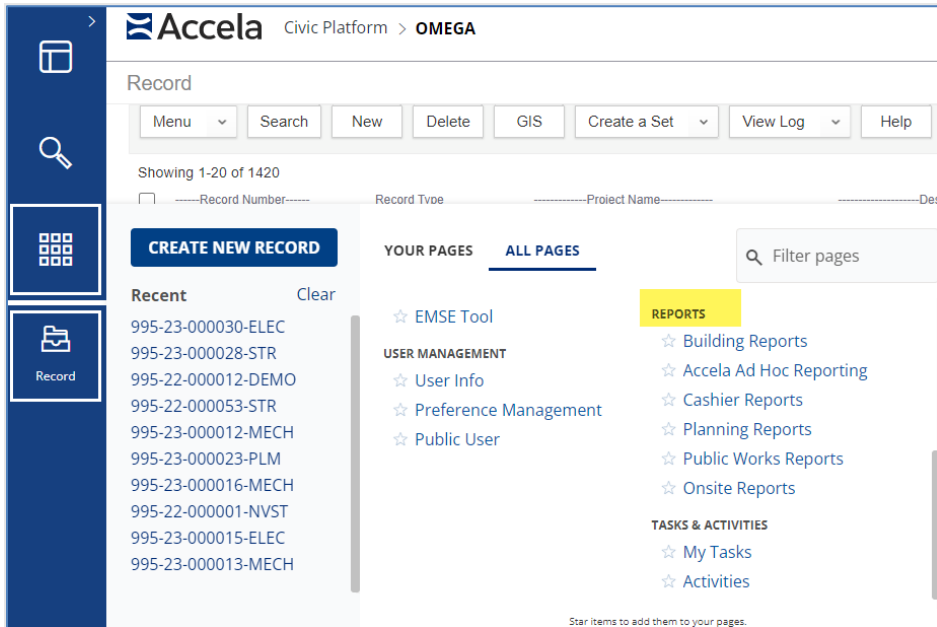


Accela Version Upgrade (22.2.5.4) Highlights (Back office)

LAUNCHPAD

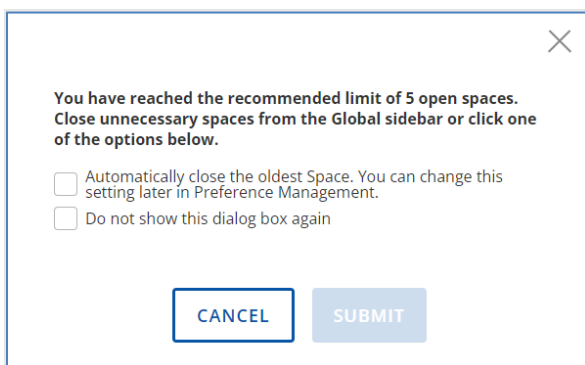
Report page names now appear correctly in the Launchpad. Instead of 'Report 1', 'Report 2' etc. They will appear as shown below:



SPACE MANAGEMENT

Accela has implemented some changes and limits to the number of spaces a user can have open at one time in order to improve performance. The new maximum limit for opened spaces on the main menu bar is 8 (previously 20). The recommended limit is 5.

When users reach the various space limits, they will encounter these notifications:



Selecting 'Automatically close the oldest Space' closes the oldest space in order of when you opened them. Only unpinned spaces are automatically closed. This setting can be changed later in Preference Management. If this option is not selected (you must manually close spaces once the limit of 8 is reached before new spaces can be opened).

The new limit for pinned spaces is 4 (previously it could be up to the allowed number of open spaces). If you reach the limit of 4 (previously, you could pin all open spaces), and try to pin another space, a notification displays, informing you that a space must be unpinned or closed before you can continue.

*When you log into the new version, if you have more than 4 spaces pinned, the system prompts you to select the spaces you want to keep pinned. Select up to 4 from the list that you want to keep pinned, then select **Submit** (the unselected items are removed) or select **Remove All**.*

INSPECTIONS

Previously, the assigned inspector was wiped out when an inspection was rescheduled. Now, the assigned inspector information is retained when the inspection is rescheduled.

When submitting a pending inspection, the inspection list now refreshes automatically.

RECORD HEADER

The record header details are no longer missing when a record is opened from an alert.

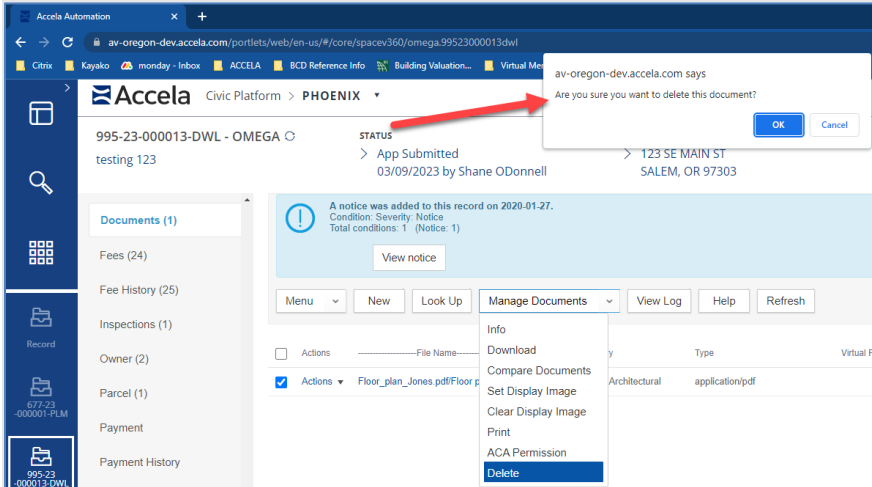
Record header components now automatically update to the latest relevant information as you save and submit changes (i.e. record status changes, changes to the description of work, etc.).

Accessing a record from reference address or reference contacts now shows the record header information (previously it was blank when navigating to a record from either of those reference pages).

DOCUMENTS

The order of actions listed under Manage Documents has changed and Delete now appears at the bottom.

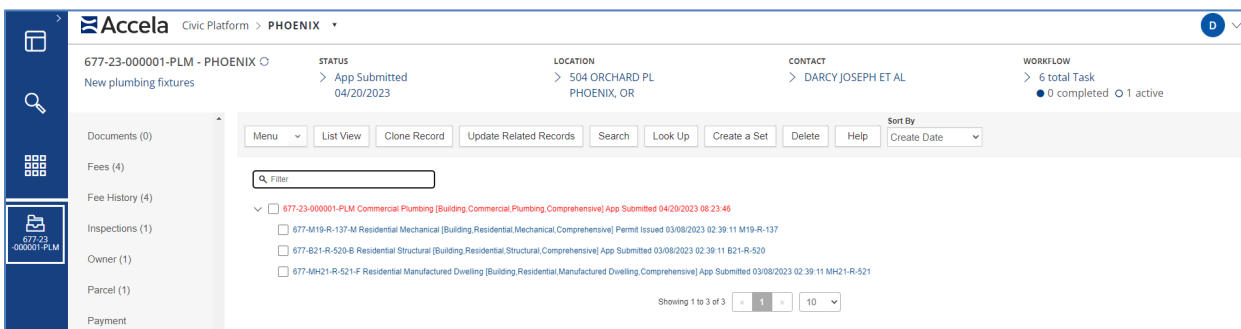
When selecting Delete from Manage Documents, the user now receives a pop-up asking them to confirm they wish to delete the document



RELATED RECORDS TREE VIEW ENHANCEMENTS

There are some changes to the related records tree view (primarily helpful for very large projects with many related records):

- A total record count at the bottom of the page.
- Pagination controls for the tree view results. The user can select specific pages, such as 1, 2, 3, or view the first page or last page of related record results.
- A dropdown allows the user to determine the number of related records to display per page.
- A quick filter field option, where the user can input a value and the tree view will update to display the transaction records matching the value. The value will be highlighted.
- A sort option based on specific record values, will sort the tree view in ascending order, A-Z or 1-10. Create Date is the default order. Other sorting options include Status Type, Record ID, Alt Id and Record Alias.



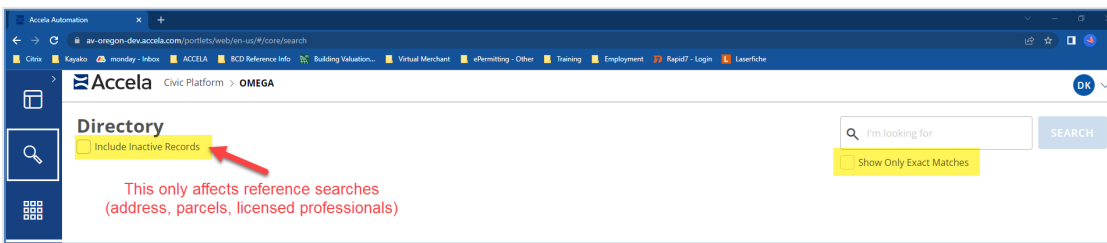
GLOBAL SEARCH

Now has an option to include both active and inactive records in reference search results (transaction records/permits and transaction documents have active records only).

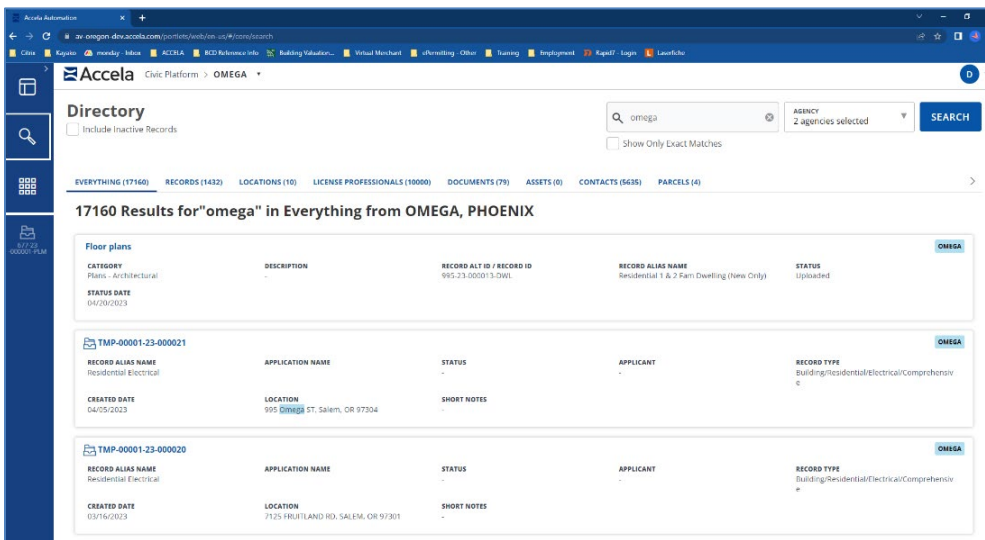
Included is the introduction of an Everything tab on the search results page - in addition to the Records, Locations, License Professionals, Documents, Contacts and Parcels tabs.

When you click the Global Search icon from the left global navigation, the search page appears – the search input field has been moved from the left side near the search icon, to the upper right near the logged in user display. You can select Include Inactive records if you want to display both active and inactive reference records, such as contact, parcel, or address, in the search results.

You may also click the box to Show Only Exact Matches.



The Search button remains gray until you type a minimum of three characters in the search box. Clicking Search returns results in eight tabs. The Everything tab displays in card format and contains a consolidated display of all results included on the other tabs.



The everything tab displays as "cards". For delegate users, an Agency tag appears on the Everything card display to reference the Agency the record (transaction Record, Contact, License Professional, Asset, Document) belongs to. The location records (Address and Parcel) will contain an agency reference in a future release.

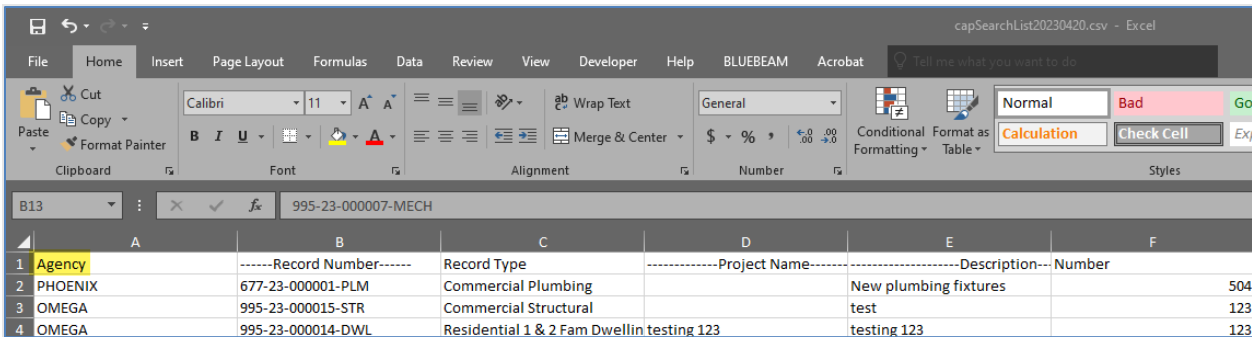
OTHER BUG FIXES

Exporting My Tasks as a CSV no longer causes an error.

Previously, the text in Standard Comments pop-ups did not wrap, making it difficult to view and/or select the appropriate comment. Now the text wraps.

The IVR number field is no longer missing from the Description of Work page when logged in as a delegate user.

Agency now appears as a column in the CSV when exported from the record list if the user is logged in as a delegate user.



	A	B	C	D	E	F
1	Agency	-----Record Number-----	Record Type	-----Project Name-----	-----Description---	Number
2	PHOENIX	677-23-000001-PLM	Commercial Plumbing		New plumbing fixtures	504
3	OMEGA	995-23-000015-STR	Commercial Structural		test	123
4	OMEGA	995-23-000014-DWL	Residential 1 & 2 Fam Dwellin	testing 123	testing 123	123