

# Accela Engage

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2013

# What's New in Accela Automation 7.3

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# Agenda

- Welcome and Introductions
- Accela Automation 7.3.0 Product Briefing
- Beyond Accela Automation 7.3.0
- Questions and Discussion

# Product Release Schedule



\* Estimated time frame

<b>Major Releases:</b>	Every 12 to 15 months
<b>Feature Pack Releases:</b>	Every 3 months
<b>Hot Fixes (patches):</b>	On Demand (days to weeks)

# 7.3.0 Product Note



## Accela Automation Release 7.3

*Statement of Direction*

### Overview

Accela provides a complete platform for civic engagement; for citizens, professionals and for the government agencies that serve them. Strengthening current functionality, improving business process flows, and building out capabilities for the Civic Cloud Platform ecosystem of customers, partners, and developers have been thematic goals for Accela Automation release 7.3.

Themes for release 7.3 were derived from direct customer feedback in addition to research of current market and technology trends. Things like improving engagement and productivity at the agency level led to the development of Communications Manager. The need to streamline processes and have a single source of information guided development of Contact Management functionality. Capturing the power of big data and tying that data to existing records led to deep GIS integration efforts. Finally, embracing trends in mobile, social and big data in many ways would not be possible or economical without the advantages of cloud delivery. Introduced in this release, Accela Civic Cloud provides a complete civic platform that can be purchased and quickly deployed as packaged solutions.

### Inside this Release

Introducing Accela Automation Communications Manager

Improving Accela Automation Search Capabilities

Greater Productivity in Calendar and Task Management

Providing Better Customer Service with Accela Contact Management

Streamlining Processes:

- Asset Management
- Reporting
- Electronic Document Review (EDR) Integration

Introducing the Civic Cloud Platform

Listening to Our Customers

<http://tinyurl.com/7-3productnote>

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# 7.3.0 Pre-Release Notes

## NEW FEATURES

### Accela Automation - Common Services and Features

#### Status Date of Conditions (11ACC-02531)

This feature applies to Accela Automation and Accela Mobile Office.

Administrators can change the behavior of the status date in conditions and conditions of approval by configuring the Standard Choice `ENABLE_CONDITION_RESOLVED_DATE`. The previous behavior updates the status date when the status changes. The enhancement only updates the status date when the conditions or conditions of approval are met.

If the Standard Choice `ENABLE_CONDITION_RESOLVED_DATE` is set to Yes:

- Applied conditions (including conditions of approval) are always saved without a status date.
- When users edit the condition status:
  - In Accela Automation, administrators can create an expression to clear the status date field when users set the condition status to applied. The condition may either be a record/inspection condition (including conditions of approval), or reference conditions.
  - Accela Mobile Office can clear the status date (resolved date) when users edit the condition status to 'Applied'.
- When users click the Override Met Status or Mark Condition As Pending action on a condition of approval, the condition status date gets cleared.

#### Applicable FIDs or Standard Choices

- `ENABLE_CONDITION_RESOLVED_DATE`

#### Soundex Search (12ACC-00779)

You can use Soundex search functionality in Accela Automation and Accela Mobile Office to do phonetic searches on contact and address (street name) search criteria.

Soundex is a phonetic algorithm for indexing names by sound, as pronounced in English. In other words, a Soundex search identifies search matches based on the way they sound rather than the way they are spelled, taking into account common misspellings. For example, a search on the name "Lee" might return values such as Lee, LI, Lea, or other similar matches.

**PRE-RELEASE**

<http://tinyurl.com/7-3prereleasenote>

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# Communications Manager

- New consolidated Communication console
- Microsoft Outlook integration enabled via Microsoft Exchange Server
  - Use Microsoft Outlook email for sending/receiving email communication to/from Accela Automation
  - Check availability of named Accela Automation user for meetings and events from their Microsoft Outlook calendar
  - Display scheduled Accela Automation tasks, activities, inspections or other date/time based information on a calendar in Microsoft Outlook
- The ability to send SMS text messages from an agency's SMS text message provider account

# Communications Manager

- An agency-level correspondence list to keep track of communications initiated from and received by Accela Automation, including incoming/outgoing emails, outgoing SMS text messages and meeting invitations
- A record-level consolidated communication list containing a summary of emails, SMS text messages, meetings, activities, inspections, documents (i.e. record attachments) and workflow history applicable to each record

# Communications Manager



Service Requests

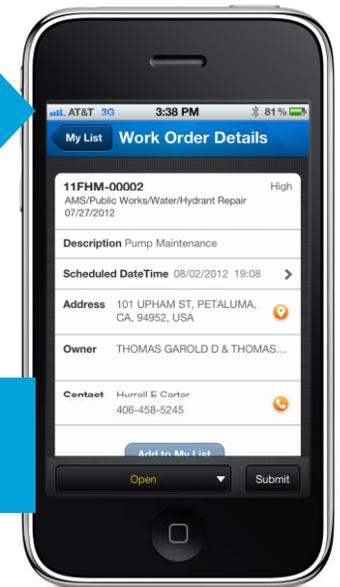
Menu Search New Help

Record #	Status	Record Type	Opened Date	Address	City	Description
1004		ServiceRequest/SR/PW/Vehicle	10/02/2012	CAMINO RAMON	SAN RAMON	
		ServiceRequest/SR/PW/Vehicle	05/31/2012	CAMINO RAMON	SAN RAMON	
		ServiceRequest/SR/PW/Vehicle	05/15/2012		PETALUMA	
		ServiceRequest/SR/PW/Vehicle	12/02/2011	MAIN	UNINCORPO...	
		ServiceRequest/SR/PW/Vehicle	10/06/2011	ALLEGHENY	PETALUMA	

Record ID: CE12-004

Menu Save Reset Summary Help

Go To Record Summary Record Detail Info Contacts (1) Address (1) Investigations (0) Workflow Comments (0) Flags (0)



Communication Manager

Menu Help

Sent Items

Menu Search Delete Help

Title	Type	From	To	Sent	Event
MESSAGE_ACA_CONNECT_LICENSE_APPROV...	E-mail	Aaanghiet1@acela.com	minos.huang@acela.com	02/27/2013 23:40:10	
MESSAGE_ACA_CONNECT_LICENSE_APPROV...	E-mail	minos.huang [re]	alan.yan@acela.com	02/26/2013 17:37:40	
MESSAGE_ACA_CONNECT_LICENSE_APPROV...	E-mail	minos.huang	spini@acela.com	02/23/2013 05:11:20	License Approve
COM-1300033	E-mail	Auto_Sender@Ac...	spini@acela.com	02/21/2013 10:32:39	Update ABI
Inspection Result of Repair: 55A...	E-mail	Auto_Sender@Ac...	spini@acela.com	02/21/2013 02:32:10	Result Inspection

Communication Detail

Related Entities

Importance: Normal

To: minos.huang@acela.com

From: Aaanghiet1@acela.com [Aaanghiet1@acela.com]

Sent: 02/27/2013 23:40:10

Subject: MESSAGE\_ACA\_CONNECT\_LICENSE\_APPROVE\_USER

Attachment(s):

Content: Template Name: MESSAGE\_ACA\_CONNECT\_LICENSE\_APPROVE\_USER

License Number (variable): 1905309

Comments:

Event:

Status:

# Improved Search Capabilities

- Location-Intelligent Search, Nearby Query and Geo-tagging Records
  - Users can quickly search for and find records/inspections/condition assessments that are:
    - Within the map extent (visible geographic area)
    - Within a boundary (polygon)
    - Near a selected feature (asset, parcel, GIS object)

The screenshot shows the mobile application interface for searching records. At the top, there are navigation tabs for 'File', 'Search', 'Contents', and 'Layers'. Below the tabs, there is a search bar with a dropdown menu set to 'Accela Records'. The search form includes several fields: 'Record ID' and 'Record Type' (with a magnifying glass icon), 'Record Status' (a dropdown menu with '--Select--'), 'Record Name', 'Department' (with a magnifying glass icon), and 'Staff' (with a magnifying glass icon and a user icon). Below these fields is an 'Opened Date' section with 'From' and 'To' date pickers. At the bottom, there is a dropdown menu for 'Select Search Area' with a blue highlight. The dropdown menu is open, showing three options: 'Within Map Extent', 'Within Selected Feature', and 'Near Selected Feature'. The 'Within Map Extent' option is highlighted with a red box.

# Improved Search Capabilities

- Soundex Search to identify search matches based on the way they sound rather than the way they are spelled, taking into account common misspellings.
  - Contact First Name, Middle Name, Last Name,
  - Organization Name
  - DBA/Trade Name,
  - Alias or Alternate Name
  - Address Street Name
- Record Search form in the form designer now expands to accommodate all possible fields when modifying a form field layout

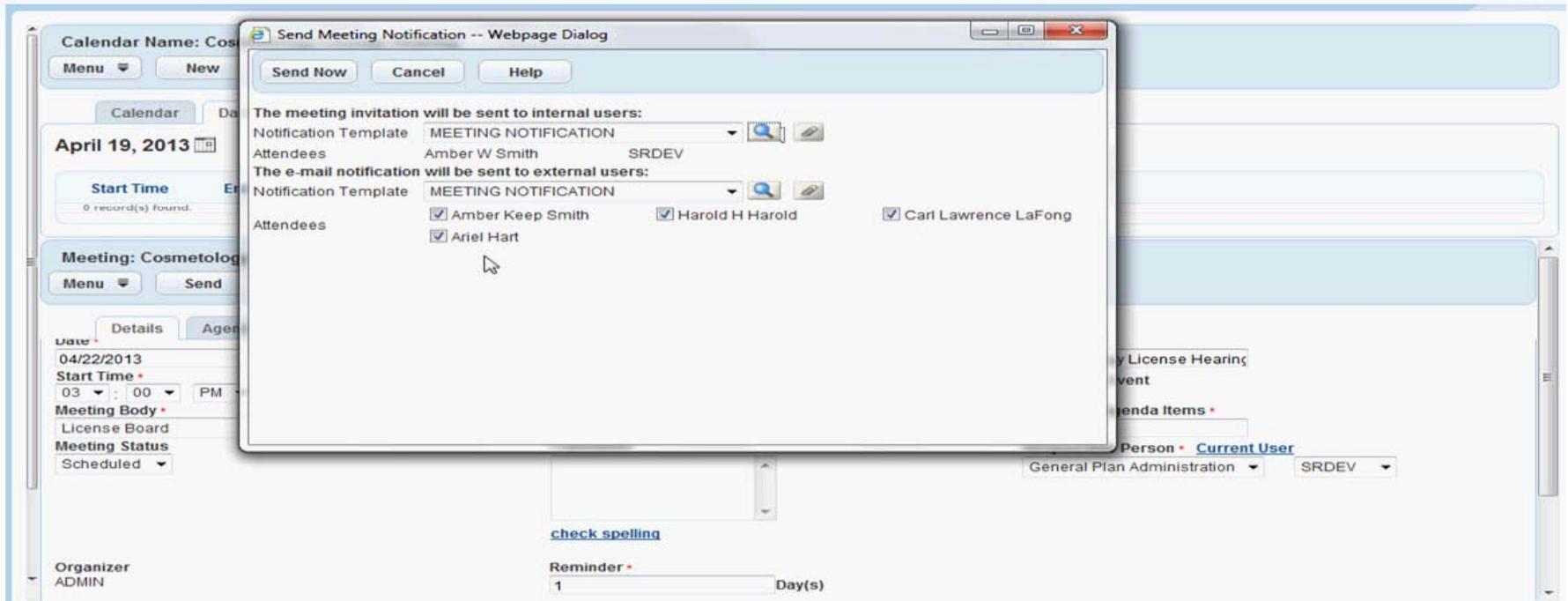
# Improved Search Capabilities

- Reference Address Form in Accela Automation has been extended to the address search in Accela GIS Search and Accela Mobile Office.
  - Users can search for addresses by any field defined in the Reference Address Form Layout on the Search panel.
  - Additional address fields have been added to better support internationalization and customers outside the U.S. where address formats may be unique to that region.

# Calendar and Task Management

- Events and Hearings have been consolidated into one robust Meeting Calendar solution
  - **Meeting Attendees** – ability to add external and internal attendees
  - **Availability** – check availability of internal attendees using a combination of the Accela Automation calendar and individual Outlook calendars
  - **Meeting Documents** – documents to be uploaded specifically to the meeting
  - **Voting/Meeting results** – attendees have the ability to input a vote for each record on the agenda
  - **Notifications** – automated notifications and Outlook invites are sent when meetings are scheduled, rescheduled, cancelled, and updated, and meeting documents can be attached to notifications
  - **My Tasks** displays Meetings assigned to a specific user

# Calendar and Task Management



# Calendar and Task Management

- **Viewing Activities** – view activities through the Activities tab of the My Tasks portlet
- **Finding Activities** – use the My Tasks portlet to find activities assigned to you or others
- **Creating or Modifying Activities** – create new activities for yourself or others from the My Tasks portlet that are not related to a specific record or other object
- **Deleting Activities** – delete multiple activities from your activity list
- **Check Availability** – check yours or others availability using a combination of the Accela Automation calendar and the user's Outlook calendar when assigning new activities

# Enhanced Contact Management

- New enhancements provide features and tools to create and maintain a single reference contact record for each of their customers, both individuals and businesses
  - Determine by module whether reference contacts will be linked or copied to transactional (record) contacts. Contacts that are linked to transaction records such as licenses or permits will always be in sync with the reference contact data
  - Define Contact Types that are valid only for reference contacts (Individual, Organization) and limit other Contact Types to transactional contacts (Applicant, License Holder, Attorney, etc.)
  - Configure rules and matching criteria to determine if a record contact is new or should be linked to an existing reference contact

# Enhanced Contact Management

- New standard contact data fields and the ability to link generic template data fields (ASI groups) to Contact Types
- Directly relate reference contacts to other reference contacts in a two-way relationship and define valid relationship types
- The ability to merge reference contact records with different Contact Types
- Audit logging for all contact changes including contact merges
- Support for international contact information with the ability to define regional formatting masks for contact Phone Number Country Code, Phone Numbers, Zip Code and State dropdown list based on Country/Region

# Enhanced Contact Management

Record ID: AEE-A-13-00018

Menu ▾ Manage Contacts ▾ Help

Go To ▾

- Look Up
- New
- Deactivate
- Sync from Reference
- Sync to Reference
- Stop Sync
- Remove

Workflow Consolidated Record Activities (4) Contacts (1) Communications (4) Meetings (0) Set (0) Exams (0) Education (0) ASI ▶

Contact Number	Last Name	First Name	Middle Name	Sync	Contact Status	Start Date	End Date	Reference Contact ID	Primary
6074165	Smyth	Leah		Yes	Active	04/24/2013		878578	Yes

# Ad-hoc Reporting Tool

OK Cancel Delete

Format Font size Font

**California Retired County Employees Association**  
*Representing over 160,000 County Retirees*



*E.F. (Skip) Murphy, President  
Ann Gregory, Vice President  
Leon (Sandy) Teague, Secretary  
Edward C. (Ed) Morris, Treasurer  
William (Bill) de la Garza, Past President*

[RECORD\_ID]  
[ADDRESS\_LINE1]  
[ADDRESS\_LINE2]  
[ADDRESS\_LINE3]

Editor Source

# Ad-hoc Reporting Tool

Fields Summary Chart Gauge Misc Style Filters Preview

Report List | New Save Save As... Print HTML SQL | Results 100 | DataSource

 **Accela**

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[BO-A-13-00007](#)

101 Sunrise Blvd  
Albany  
NY

**Re: Conference Committee on Public Employee Pensions: 401(k) Plans Fail to**  
Provide for Retirement Security and Promise to be a Major Drag on the Nation's (and California's) Consumer-Driven Economy

Dear David Lee,

The California Retired County Employees Association (CRCEA) represents over 163,000 retirees of county retirement systems in California that operate under the County Employees Retirement Law of 1937. It is in the interest of our members that our retirement systems are sustainable and properly funded. We applaud the Legislature in creating your Committee and greatly appreciate the resources and time your Committee is devoting to examine public pensions in California.

We agree there are abuses in the current system that must be reformed. But we believe the replacement of defined benefit ("DB") plans with 401(k) plans, either partially or in total, would be damaging to California and its residents. We respectfully request your Committee carefully consider the following:

# Beyond Accela Automation 7.3.0

- 7.3.1 (Feature Pack 1) planned to include:
  - Accela Citizen Access support for IE10
  - Accela Mobile Office support for Windows 8
  - Crystal Reports 2011 and Enterprise 4.0 support
  - Restrict number of unsuccessful login attempts
  - WCAG 2.0 (level AA) compliance for Accela Citizen Access
  - MS SQL Server Reporting Services 2012 Adapter
  - Improve UI in Contact and Address application intake screen in Accela Citizen Access

# Beyond Accela Automation 7.3.0

- Record-type Selection/Filtering in Accela Citizen Access  
(Super Agency support)
- Two-factor authentication for Accela Citizen Access  
registered user log in
- Ability to scan a document directly to a record in Accela  
Automation
- Accela Citizen Access Page Flow Enhancements

# Questions & Discussion



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