

Accela Automation Administration and Product Familiarization Training Agenda

**State of Montana
Building Codes Bureau**

**Administration Training: January 4 and 8, 2010
Product Familiarization Training: January 5-7, 2010**

Software Administration Training Agenda

This coursework shall prepare the Core Team, those users who will be implementing the software, with the tools and knowledge to be able to assist in configuring and using the system to achieve desired results. All basic setup features will be discussed and practiced, while some advanced features will be discussed and demonstrated for possible future use.

Assumptions are:

- Students will be familiar with operating a Windows-based PC
- Students will be familiar with the agency's business processes
- Students will be given time to attend all sessions
- Students will have access to the software after training

| <i>Timeframe</i> | <i>Topics</i> | <i>Exercises</i> | <i>Instructor</i> |
|------------------|---|--|-------------------|
| Day 1 – AM | <ul style="list-style-type: none"> • Introduction: Accela Automation • Navigation <i>Login, Menu Bar, Admin/Daily, Modules, Preferences, Display Settings, Menu Navigation, My Navigation, On-line help, V360 Console vs Accela Automation</i> • Access <i>Organization, User Groups and Users, Functional IDs (FID'S), security</i> • Reference Data – common information used throughout the system <ul style="list-style-type: none"> ○ People and Property ○ Address, Parcel and Owner • Standard Choice Introduction | <p>Create New User IDs</p> <p>Enter and search for records</p> | Leanne Hardesty |
| Day 1 – PM | <ul style="list-style-type: none"> • Discuss Applications and Application Types (Building Permits, Code Violations, Planning) <i>Naming conventions, standards and best practices</i> • Application Type Setup (4 Levels) throughout the system <i>Overview, Category Codes and discuss linked categories</i> • Application Specific Info <i>Associating non-standard fields to an Application</i> • Application Specific Info Tables <i>Creating a table to store multiple data</i> | <p>Create Application Type</p> <p>Create App specific info and table</p> | Leanne Hardesty |

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| | <ul style="list-style-type: none"> ◦ <i>items, such as plumbing fixtures</i> • V360 Tools - Advanced Features <ul style="list-style-type: none"> ◦ Console Configuration ◦ Form Portlet Designer | | |
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| <i>Timeframe</i> | <i>Topics</i> | <i>Exercises</i> | <i>Instructor</i> |
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| Day 2 – AM 830a-12p | <ul style="list-style-type: none"> • V360 Overview <ul style="list-style-type: none"> ◦ Navigation ◦ Terminology • Create New Record <ul style="list-style-type: none"> ◦ SPEAR Form ◦ Reference data v. Transactional data ◦ Submit • Search existing <ul style="list-style-type: none"> ◦ Quick Queries • Record detail <ul style="list-style-type: none"> ◦ Update ◦ My Navigation ◦ Go To Menu • Application Specific Information <ul style="list-style-type: none"> ◦ Fields ◦ Tables | <p>Create new record</p> <p>View search form</p> <p>Update existing record</p> | Rose Valenzuela |
| Day 2 – PM 1p-430p | <ul style="list-style-type: none"> • Fee <ul style="list-style-type: none"> ◦ Assess ◦ Invoice • Payment <ul style="list-style-type: none"> ◦ Payment methods • Workflow Progression <ul style="list-style-type: none"> ◦ Assign task ◦ Complete task | <p>View fee items</p> <p>Pay invoiced fees</p> | Rose Valenzuela |
| Day 3 – AM 830a-12p | <ul style="list-style-type: none"> • Inspection <ul style="list-style-type: none"> ◦ Schedule/Reschedule/Cancel ◦ Assign ◦ Result • Guidesheets <ul style="list-style-type: none"> ◦ View ◦ Complete • Accela Mobile Office <ul style="list-style-type: none"> ◦ 10am-noon ◦ WebEx Session | <p>Schedule an inspection</p> <p>View guidesheet</p> | Rose Valenzuela Brian Wienke (WebEx) |

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| Day 3 PM 1p-430p | <ul style="list-style-type: none"> • Condition <ul style="list-style-type: none"> ○ Severity ○ Apply ○ Met • Standard Comments • Attachments • Complete/Close Record <ul style="list-style-type: none"> ○ Workflow tasks ○ Record detail | <p>Apply a condition to record/to reference data</p> <p>Attach a document to record</p> | Rose Valenzuela |
| Day 4 AM 830a-12p | <ul style="list-style-type: none"> • Review of previous material • Accela GIS • Accela Citizen Access | <p>View map and features within AA</p> <p>Create an application</p> | Rose Valenzuela |
| Day 4 – PM 1p-430p | <ul style="list-style-type: none"> • ID Mask Definition (Sequence Mask ID = CAP ID) • Workflow <i>Setting up tasks for an Application Type</i> • Smart Choice Groups <i>Associating the standard information sections for each application type</i> | <p>Create ID Mask</p> <p>Create workflow</p> <p>Create Smart Choice Group</p> | Rose Valenzuela |
| Day 5 – AM 830a-12p | <ul style="list-style-type: none"> • Inspections <i>Creating Inspections, Inspection Groups, Inspection results and Guide Sheets</i> • Fees <i>Fee types, fee formulas and setting up fees</i> • Script Review <i>Master Scripts, Events, Standard Choices</i> | <p>Create inspection types</p> <p>Create fees</p> <p>Create script</p> | Rose Valenzuela |

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| Day 5 – PM 1p-430p | <ul style="list-style-type: none">• Conditions Severity – Lock, Hold, Notice, Required <i>Setup constraints for an object, which can be used to stop or enforce an Application process</i>• Standard Comments <i>Creating standardized comments to be used for workflow tasks, inspections, etc.</i>• V360 Tools - Advanced Features<ul style="list-style-type: none">○ Menu Navigation○ My Navigation○ ASI Form Layout Editor○ QuickQueries Q & A Wrap up | Create Condition Create comment | Rose Valenzuela |
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