



Accela Mobile[®]

Version 24.1

User Guide

July 2024



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Get started with Accela Mobile

Accela Mobile lets you perform inspections and investigations in the field using your mobile device. You can use Accela Mobile to:

- Create, reschedule, and reassign inspections.
- View inspections on a map and navigate to an inspection location.
- Capture evidence by attaching photos and videos.
- Insert comments using comment controls that allow ad hoc as well as standard, favorite, and recent comments.
- Use extensive checklist functionality (with the ability to select checklist items individually or in batches) to add comments or documents, fill out custom fields and tables, and score and result inspections.
- View and update record and inspection conditions.
- View, edit, or email record contacts.
- Result inspections.



Note: Using Accela Mobile on a tablet provides more screen space to display inspection and record information.

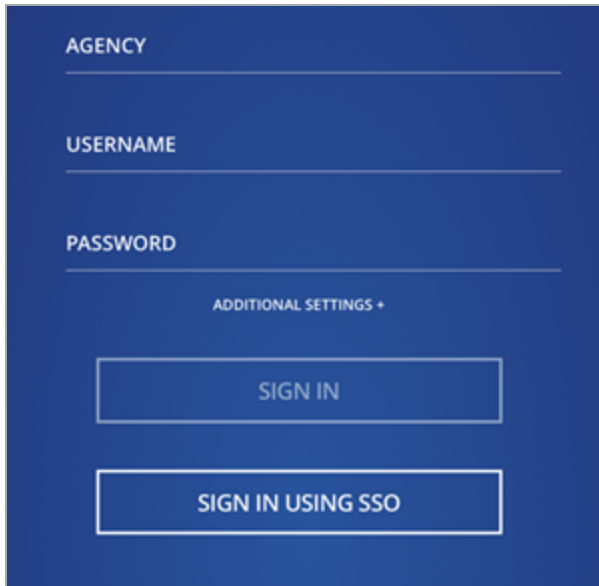
Sign in



Important: Your device must have an active data connection to sign in to Accela Mobile.

To sign in to Accela Mobile,

1. Select the Accela Mobile app on your device.
2. Type your Civic Platform agency username and password.



3. If you want to change Environment or Construct instance, select **Additional Setting**.

Notes:

- Environment should be set to PROD unless your agency has told you to specify a different environment.
- Construct instance should be set to PROD unless you are located in Australia or New Zealand, in which case you should choose ANZ. This is a regional mirror that will provide better performance in those two countries.

4. Select **SIGN IN**.

Note: Each time you sign in, Accela Mobile syncs with Civic Platform:

- It downloads your inspections list and required records to your device.
- It uploads to the server any queued data from work you completed while your device was offline.

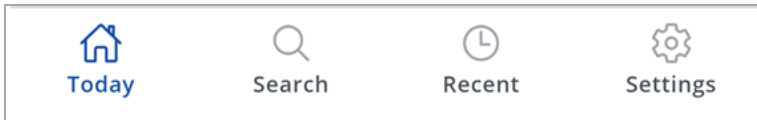
See [Work offline](#) for information about working without an active data connection.

Default view





After signing in, the default view is the inspections list as configured by your agency administrator. The inspections list displays the tasks assigned to you and provides access to the information and tools necessary to view, plan, and work on them.

Navigate the app

A persistent navigation bar at the bottom of the screen makes it easy to find the items you need.



Select the item you want to use.

Item	Description
Today 	Today functions as a Home button that returns you to the default view—your inspection list of current tasks.
Search 	The Search tool makes it easy to quickly locate inspections or records you need. See Search for more information.
Recent 	The Recent tab displays a list of the inspections and records you've opened recently. These items are for your reference and are not actionable. This is also where you can sync data with the Civic Platform server when you reenter data coverage after doing work offline. See Work offline for more information.
Settings 	Settings options let you customize Accela Mobile using device-level preferences. Settings also displays the version of Accela Mobile that you are using on your device. See Settings for more information.

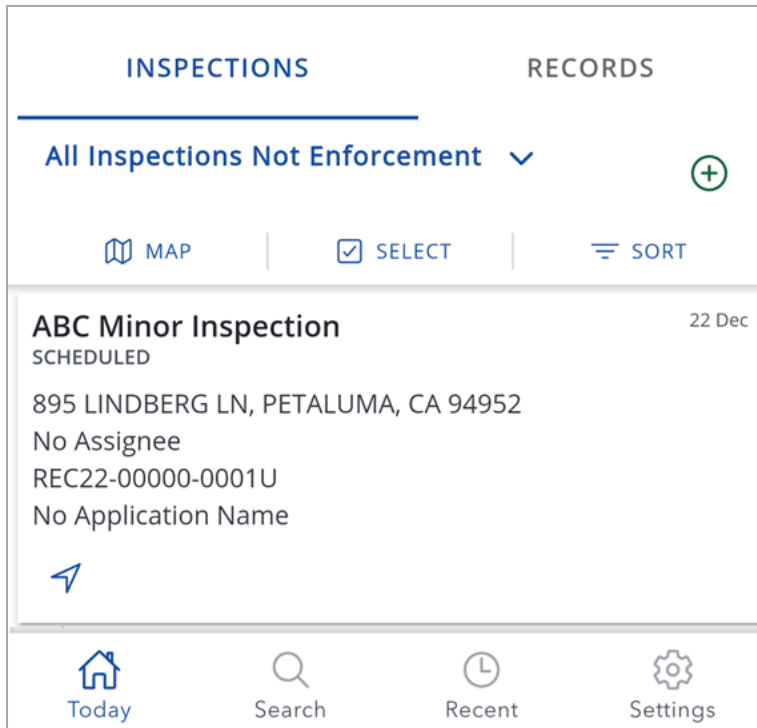
Log out

To log out of Accela Mobile,

- From **Settings** () , select **Log out**.

The inspections list

The inspections list is the default view after you sign in. It is configured by your agency administrator to list the tasks assigned to you. It also provides access to the necessary tools and information you'll use to view, plan, and complete your tasks.



You can open any item on the inspections list by selecting it.



Note: If you are viewing the Inspections list on a tablet, the default view is a split screen with the inspections on the left and a map on the right. You can hide the inspections list to view the map full-screen.

Sort your inspections list

Accela Mobile provides a number of options for filtering and sorting the items on your inspections list.

To filter or sort the inspections or records list

1. Select **Sort** (☰) under the inspections or records tab.
2. Select the option by which you want to sort the inspections or records list.
3. Select **Apply**.

Re-order the inspections list

You can reorder the inspections list in any custom order to suit your needs. For example, you can re-order your inspections list to be in the order of location from furthest from your home location to the closest.

1. Select **Sort** (☰) under the inspections or records tab.
2. Select **Custom order**.
3. Select and hold the handle ☰ of the item you want to move and drag it to the desired location. Repeat with other items.
4. Select **Apply**.

Select multiple inspections for bulk processing

You can select multiple inspections to result, reassign, or reschedule them in bulk.

To select multiple inspections

1. In the inspections list, select **Select** (☑).
2. Select the desired jobs or select **Select all** to select all jobs on the list.
3. Select the action you want to perform on the selected jobs.

For information on completing the specific action you want to perform, see the appropriate section in [Inspection actions](#).

Refresh the inspections list

Because Accela Mobile syncs with Civic Platform only when you sign in or perform a manual sync, it's useful to refresh the data in your inspection list from time to time as you work. A refresh updates content related to your inspections and records—and pushes data from your device to the Civic Platform server.

To refresh the inspections list


1. Scroll to the top of the inspections list.
2. Swipe down on the list.

 **Notes:**



- Any filters or view options you've applied to your inspections list will not persist after a refresh; the refreshed list will appear in its default configuration.
- If you have enabled **Drag to Download** in **Settings**, swiping down to refresh the list will download the inspection data to your device—so that it will still be available when you do not have a data connection. See [Settings](#) for more information.

Add a new record


You can add a new record directly from the Inspections list by selecting . See [Add a new record](#) for more information.



Inspections

Accela Mobile lets you manage and complete inspections on your device. As a representative for your agency, you can review a project, asset, or work to ensure that the process, item, or final result complies with the codes and regulations established by government agencies. You can view an inspection's grade (if enabled) and you can enter a grade for an inspection.

You can open an inspection by selecting it from the Inspections list, search results, or from a record.





Get directions to an inspection









After an inspection is opened, you can select **Route**  to display the route to the location. (The first time you select **Route**, you will be prompted to select the map application to be used.)

You can also select  **Map** from the inspection list to view your inspections as pins on a map. Select an inspection pin and then select  to see the route. See [Maps](#) for more information.

Inspection information

With an inspection open, you can view, add, or update the following information.

Item	Description
Checklists 	<p>Checklists are defined by your agency to help you effectively complete inspections by outlining the items that need to be done. For example, a final building inspection displays a list of tasks to verify that all public works items, including asphalt, sewer, sidewalk, storm, and street lights, meet or exceed building requirements defined by the city.</p> <ul style="list-style-type: none"> To add a checklist to the inspection you have open, select Add checklists, select the checklist you would like to add, then select Submit. To work with an existing checklist, you can select a checklist item to open it. You can then set a status, leave a comment, add an attachment to a specific checklist item (for example, if the grass is too tall for a specific checklist item, you could take a picture and attach it), or set a score. You can also fill out any custom forms that have been defined for the item. If enabled, you can also mark items as major violations. To remove a checklist, swipe left across it.
Comments 	<p>You can compose your own comment, select a standard comment available from a list, select a starred comment, or select a recently used comment. Select the star icon  next to any standard comment to add it to the starred list.</p> <p> Tip: When adding your own comment, use the voice-to-text option on</p>

Item	Description
	 your phone's keyboard screen to record corrections as you go.
Conditions 	These are any conditions which have been applied to the inspection or the record it belongs to. Conditions show that the customer is required to do something before the inspection can be completed. Each condition includes basic information, status, severity, priority, dates and comments. As an inspector, you can place a condition on a record based on a failed inspection and you can also lift a condition when a project passes the inspection.
Contacts 	These are the contacts related to the record. For information on calling, texting, or emailing a contact, see Use contacts .
Documents 	These may include items such as building plans, files, or photos or videos taken in the field. Select Add attachment to attach a photo or video to the inspection you have open.
Inspections history 	This lists other inspections on the parent record. You can view and update the associated information.
Related inspections 	Inspections that are related to the current opened inspection. You can view and update the associated information.
Time accounting 	Time Accounting tracks the amount of time you spend performing tasks related to the inspection. Before inputting time, you'll need to select Time accounting group and select the correct group from the list set up by your agency, then select Time accounting type and select the correct type from the list set up by your agency.
Mileage accounting 	This is a simple way to track the mileage driven to complete the inspection. Add Start odometer and End odometer numbers and enter your Vehicle ID .

View records attached to inspections

To view the record attached to an inspection

- Select the **View record** icon .


Result an inspection

See [Inspection actions](#).


Inspection actions

When working with an open inspection, you can perform key actions from the action menu.


Add inspection

1. From an open inspection, select the action menu icon .
2. Select **Add inspection**.
3. Set the **Type**, then select **Next**.
4. Assign the appropriate authority, then select **Next**.
5. Set the date and time for the inspection to be completed.
6. Select **Submit**.

Attach


1. From an open inspection, select the action menu icon .
2. Select **Attach**.
3. Take a photo or video, choose an existing photo or video, or choose from other files on your device.
4. Select **Save**.

Cancel inspection

1. From an open inspection, select the action menu icon .
2. Select **Cancel inspection**.
3. Select **Yes**.

Reassign

You can reassign an inspection that should be assigned to someone else. You can also reassign a pending inspection to yourself so that it will appear in your Inspections list.

1. From an open inspection, select the action menu icon .
2. Select **Reassign**.
3. Select the correct owner for the inspection and select **Submit**.

Reschedule

You can reschedule an inspection for a different day or time.

1. From an open inspection, select the action menu icon ^{ooo}.
2. Select **Reschedule**.
3. On the calendar, locate and select the day for the inspection.
4. Below the calendar, select the desired time option.

Option	Description
No Time	Choose this option to schedule an inspection without specifying a specific time.
AM	Choose this option to schedule a morning inspection without scheduling a specific time.
PM	Choose this option to schedule an afternoon inspection without scheduling a specific time.
At ...	Choose this option to schedule an inspection for a specific time during the day.

5. Select **Save**.

Result

To complete an inspection, you must finalize the results.



Note: Based on agency settings, you may need to complete a **Time accounting** entry before you can result an inspection. If you have not previously completed time accounting for an inspection you would like to result, select **Time accounting** from the open inspection, fill out the required information, and select **Save**.

To result an inspection

The first step for resulting an inspection may differ depending on your mobile device.

1. From an open inspection, if there is a blue **Result** button in the upper left of the page, select it.
Or, if there is not a **Result** button, select the action menu icon ^{ooo}, then select **Result**.
2. Select a **Set status** option and select **Next**.
Some inspections, such as food inspections, may require you to assign a grade.
3. If required by your agency settings, select a grade for the inspection and then select **Next**.
4. If required by your agency settings, specify the time duration for the inspection by selecting a Start and End time.



Note: This step is not affiliated with Time Accounting.

5. If desired, enter a Result comment with your corrections. You can type a new comment or select a comment from the **Standard**, **Starred**, or **Recent** comment lists. Select **Next**.



Tip: Use the voice-to-text option on your phone's keyboard screen to record corrections as you go.


6. Select the **Inspector signature** field, add your signature, and select **Save**.
7. Select the **Responsible party signature** field.
8. Have the responsible party add their signature and type their name in the **Name** field.
9. Select **Save**.
10. Select **Submit**.

Run report

You can run preconfigured reports that have been set up by your agency.




Note: When you run a report, it is run on the server and is then sent to Accela Mobile as a PDF. This means that you can run reports *only when your device has data connectivity*. The only exception is the Inspection Summary Report, which can be run offline.

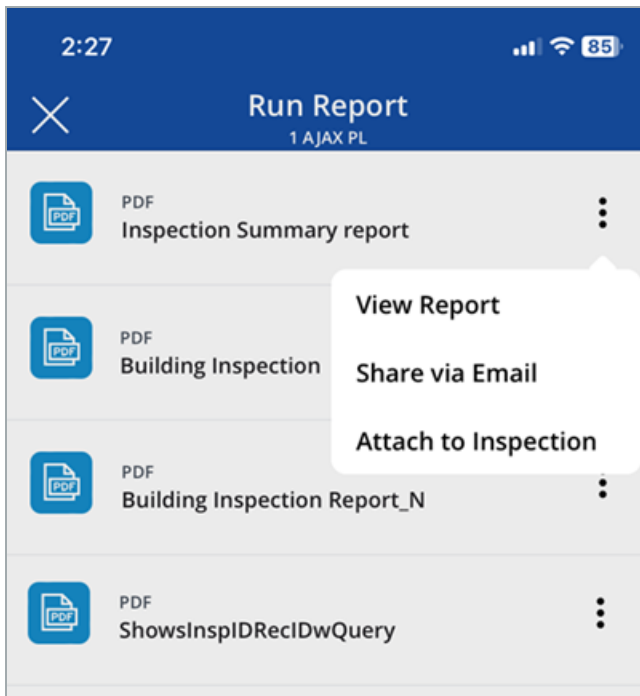
1. From an open inspection, select the action menu icon .
2. Select **Run report**.

A list displays the configured reports that are relevant to the inspection that is open.



Note: If you are unable to find the report you need, contact your agency Accela Mobile administrator.

3. Select the more icon  for the report you want to run, and then select from the following options:



- **View report** runs and opens the report.
- **Share via email** runs the report and opens a page to select email recipients from the contacts on the record.



Note: On iOS devices, the Mail app is currently the only supported email app.


- **Attach to inspection** runs the report and automatically attaches it to the inspection.



Tip: If you only want to view a report, you can run it by selecting the report name directly from the **Run report** list.

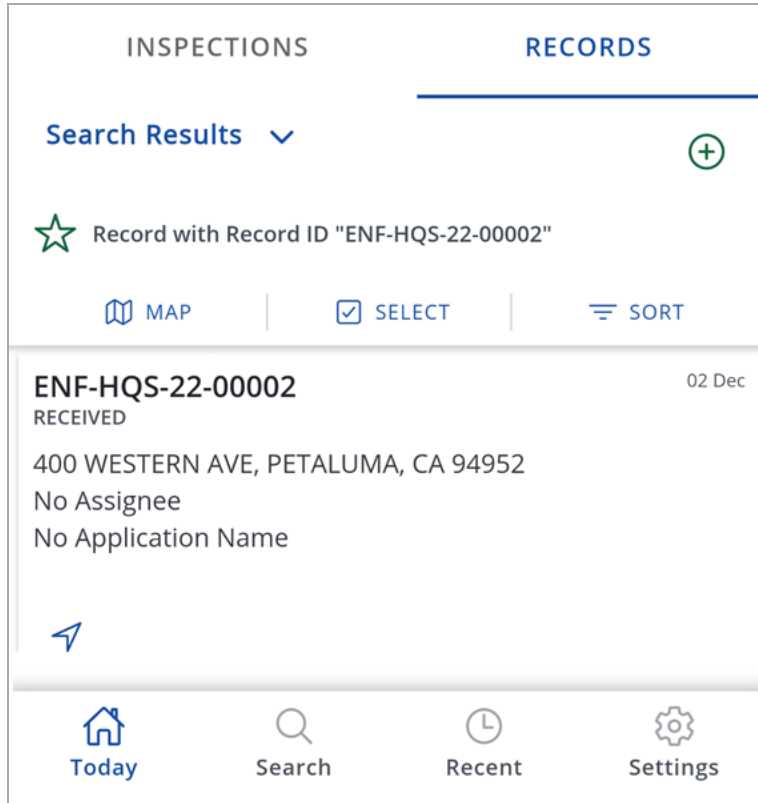
Refresh data


Refreshing data downloads updated content related to your inspections and records from the Civic Platform server to your device, but it does not push new or changed data from your device to the server.

1. From an open inspection, select the action menu icon .
2. Select **Refresh data**.

Records






Records include a broad range of forms that include applications, cases, licenses, permits, service requests, and work orders. Records are the means for collecting and storing the data necessary for your agency to meet its objectives.













You can open a record by selecting it from the record list or search results. You can open the related record from an inspection by selecting the View Record icon  in the inspection detail page.

Record information

After you've opened a record, you can view, add, or update the following information.


Item	Description
Address, parcel, owner 	This is the location information (address and parcel) associated with the record. Select  to receive directions to this record.
Assets 	You can add asset information such as asset type, name, ID, and group.
Comments 	You can compose your own comment, select a standard comment available from a list, select a starred comment, or select a recently used comment. Select the star icon  next to any standard comment to add it to the starred list.

Item	Description
 Tip: When adding your own comment, use the voice-to-text option on your phone's keyboard screen to record corrections as you go.	
Conditions 	These are any conditions which have been applied to the record to show that the customer is required to do something before the inspection can be completed. Each condition includes basic information, status, severity, priority, dates and comments. As an inspector, you can place a condition on a record based on a failed inspection and you can also lift a condition when a project passes the inspection.
Contacts 	These are the contacts related to the record.
Costs & parts 	You can look up the costs of labor or parts and add them to the record.
Custom fields 	Records in Civic Platform may include custom fields and custom tables designed by your agency for information that is not included in the standard template. Any custom fields used by your agency are visible here.
Custom lists	Each custom list/table displays as one tab.
Documents 	These may include items such as building plans or photos or videos taken in the field. Select Add attachment to attach a photo or video to the currently open record.
Fees & payments 	You can review the fees and payments associated with a record in a read-only format that shows dates, fee items, payments, and total amount due.
Inspections 	These are the inspections on the record.
Related records 	<p>A record can have multiple parent records and child records. Related Records are parent records and child records for the open record . You can open related records to view and update the associated information. This information is particularly useful if your agency assigns you multiple inspections in a new apartment complex or in a housing development area. This feature allows you to review the related building permits and any associated inspection results.</p> <p>You can also search for other records and associate them with the current record as either a parent or child record.</p>
Workflow tasks 	A Workflow is a set of tasks that your agency prescribes and follows to process an application. Workflow Tasks displays a list of all tasks associated with the record and provides their current statuses. You can identify the current or next task to prepare for the next step in the process and can update steps and status.

Record actions


When working with an open record, you can take key actions from the action menu.

Add inspection

1. From an open record, select the action menu icon .
2. Select **Add inspection**.
3. Set the **Type**, then select **Next**.
4. Assign the appropriate authority, then select **Next**.
5. Set the date and time you want the inspection to be completed.
6. Select **Submit**.


Reassign

You can reassign a record that should be assigned to someone else.

1. From an open record, select the action menu icon .
2. Select **Reassign**.
3. Select the correct owner for the record and select **Submit**.

Reschedule

You can reschedule a record for a different day or time.

1. From an open record, select the action menu icon .
2. Select **Reschedule**.

3. On the calendar, locate and select the day.
4. Below the calendar, select the desired time option.


Option	Description
No Time	Choose this option to schedule without specifying a specific time.
AM	Choose this option to schedule for a without scheduling a specific time.
PM	Choose this option to schedule for an afternoon without scheduling a specific time.
At ...	Choose this option to schedule a specific time during the day.

5. Select **Save**.

Set record status

Record statuses are defined by your agency to describe the current state of a record. Statuses might include New, In Progress, Closed, and others.

To set the status of the currently open record,


1. Select the action menu icon .
2. Select **Set record status**.
3. Set the status then select **Save**.

Run report

You can run preconfigured reports that have been set up by your agency.




Note: When you run a report, it is run on the server and is then sent to Accela Mobile as a PDF. This means that you can run reports *only when your device has data connectivity*. The only exception is the Inspection Summary Report, which can be run offline.

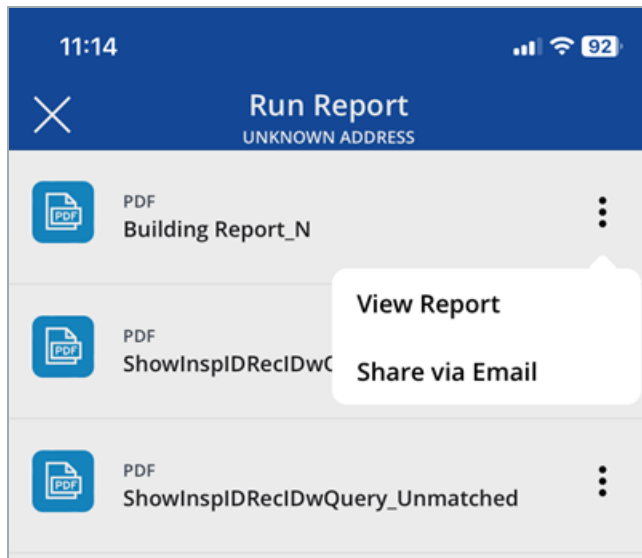
1. From an open record, select the action menu icon .
2. Select **Run report**.

A list displays the configured reports that are relevant to the record that is open.




Note: If you are unable to find the report you need, contact your agency Accela Mobile administrator.

3. Select the more icon  for the report you want to run, and then select from the following options:



- **View report** runs and opens the report.
- **Share via email** runs the report and opens a page to select email recipients from the contacts on the record.


 **Note:** On iOS devices, the Mail app is currently the only supported email app.



Tip: If you only want to view a report, you can run it by selecting the report name directly from the **Run report** list.

Refresh data

Refreshing data downloads the current record data (including contacts and documents) but does not download any configuration changes.

1. From an open record, select the action menu icon .
2. Select **Refresh data**.

Add a new record

Although you'll probably spend most of your time working with existing records, your tasks for the day may require you to create a new record while in the field—for example, when you observe a code violation.

To add a new record

1. From the **Inspections list** or **Records list**, select .

The **Create record** page displays.



Note: Items marked with a red asterisk are required. You will not be able to submit the new record until they have been completed.

2. Set the **Type**.
3. Change **Assigned to**, if necessary. By default, the new record is assigned to the current user.
4. Open **Address**. You can set the address selecting **Map** or **Form**, or by manually typing the address information.
5. If necessary, add assets to the record:
 1. Open **Assets**.
 2. Select **Add assets**.
 3. Select **Form** to look up assets or select **Map** to locate an asset on the map. Enter as much information as possible then select **Go**.
 4. Select **Add** for each asset you want to add to the record.
 5. When finished, select **Done**.




Notes:

- You can also add assets to an existing record from that record's **Assets** tab.
- When adding assets, the **Address** field can be left blank.

6. If desired, add a comment to the record:
 1. Open **Comments**.
 2. Select **Compose** to create your own comment, **Standard** to select a comment available from a list, **Starred** to select a comment you have starred, or **Recent** to select a comment you've recently used.



Tips:

- Select the star icon  next to any standard comment to add it to the starred list.
- When adding your own comment, use the voice-to-text option on your phone's keyboard screen to record corrections as you go.

3. Select **Done**.

7. Complete any required custom fields.
8. (Optional) Add attachments.
9. Select **Submit**.

Remove an inspection or record from the list

Use **Remove** to remove selected items from the inspection or record list.

To remove inspections or records

1. In the inspections or records list, select **Select** (☑).
2. Select the items you want to delete.
3. Select **Remove**.



Notes:

- Removing inspections or records from the list does not actually delete them from Civic Platform—it simply removes them from the list on your device. Removed items are still available to download from Civic Platform.
- You will not be prompted asking if you want to remove the selected items. The items are simply removed.

Search

Use **Search** (🔍) to quickly locate inspections or records.

Search for an inspection or record

1. From the main menu, select **Search** 🔍.
2. Select **Inspections** to search inspections or **Records** to search records.
3. Add the search parameters you want to use.



Note: If your search will use both **Inspection type** and **Inspection status** as search criteria, you must set **Inspection type** before selecting **Inspection Status**.

4. Select the search button 🔍.

Saved searches

After defining and running a search, you can save it to easily run it again later.

To save a search to run again later

1. Define and run the search.
2. When the search results appear, select the star icon ☆ that appears in the search description at the top of the list of results.



Notes:

- You can rename a saved search.
- You can also run previous searches from the **History** tab.

To run a saved search

1. Open the **Saved** tab.



2. Locate and select the search you would like to run.

The search form opens, showing the parameters it contains. You can modify these parameters as

necessary.

3. Select the search button  to run the search.

Search history

Accela Mobile keeps a history of searches you have made. This lets you easily locate a search that you performed at an earlier time.

To run a search from the search history

1. Open the **History** tab.



2. Locate and select the search you would like to run again.

The search form opens, showing the parameters it contains. You can modify these parameters as needed.

3. Select the search button  to run the search.

Maps

From the Inspections list or Records list, you can view your inspections or records on a map by selecting **Map** (📄).



Note: To return from a map to your inspection list, select **Show list**.

Show your current location

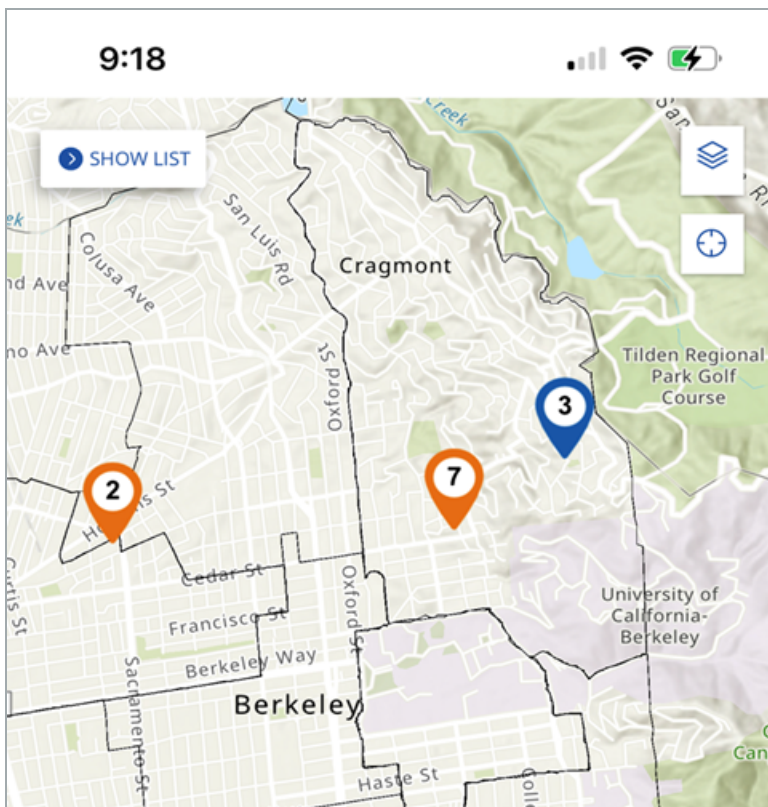
- Select the location icon 📍 to have the map identify your current location.



Tip: Using **Maps** lets you plan your route based on your location without having to rearrange your route list.

Map pins

Pins mark locations on the map. As you zoom in, the pins become more spread out. The number inside each pin denotes the number of inspections or records in that location. You can select an item to view its record(s) or select 📍 to open a map service for routing.



Meanings of pin colors



Blue

Job is not overdue.



Orange

Job is overdue by one week or less.




Red

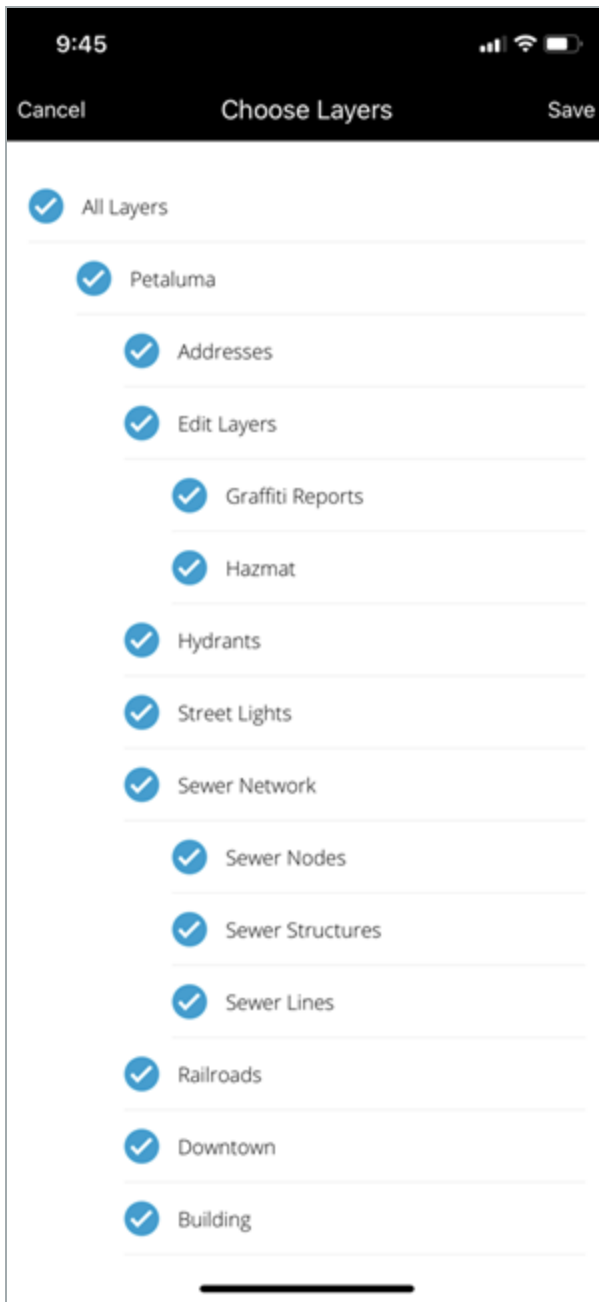
Job is overdue by more than one week.

Manage map layers

If your agency has correctly set up custom Esri map layers, you can manage them to display the layers you would like to view.




To manage map layers

1. Select the layers icon .
2. Select the desired layers.



Use contacts


Call, text, or email a contact

1. Open an inspection or record.
2. Select **Contacts** to display the Contacts list.
3. Select the contact to whom you want to send a communication.
 - Select  to send a text message to the contact.
 - Select  to call the contact.
 - Select  to send an email to the contact.



Note: Accela Mobile displays only the relevant contact icons for each contact. For example, if the information for a contact does not contain a phone number, the phone and SMS icons won't appear.

Add a new contact

1. Open an inspection or record.
2. Select **Contacts**.
3. Select .

A screenshot of a mobile application interface for creating a contact. The top status bar shows the time 9:59, signal strength, Wi-Fi, and battery icons. Below the status bar is a dark blue header with 'CANCEL' on the left and 'SAVE' on the right. The main form area has a light gray background and is divided into sections: 'TYPE' with a dropdown menu showing 'Individual' and a chevron; 'CONTACT TYPE' with a chevron; 'PRIMARY' with a toggle switch set to 'No'; 'DETAILS' section containing input fields for 'FIRST NAME', 'MIDDLE NAME', 'LAST NAME', 'PHONE NUMBER', and 'EMAIL ADDRESS'.

4. Add the contact information.
5. Select **Save**.

Work offline

Accela Mobile lets you work with records and inspections in offline mode, allowing you to download inspection lists, records, documents, contacts, forms, tables, and workflows to your device for use offline in the field. If a data connection is not available when you update an inspection, the app will queue updates to be sent later when you initiate a sync.

Download inspection data for offline use

Any time your device has an active data connection, you can download refreshed data for the items currently in your inspections and records lists. A refresh is not a full sync—it pulls updated content related to your inspections and records from the Civic Platform server to your device, but it does not push new or changed data from your device to the server.



Note: **Drag to download** in **Settings** must be enabled in order to refresh the list by swiping. See [Settings](#) for more information.

To refresh data

1. Scroll to the top of the inspections list.
2. Swipe down on the list.



Notes:

- A refresh can be performed only when you have an active data connection.
- Any filters or view options you've applied to your inspections list will not persist after a refresh; the refreshed list will appear in its default configuration.
- Regardless of whether **Drag to Download** is enabled, Accela Mobile Application caches data that you have viewed while the device is online. This cached data is available to view when your device does not have a data connection.

Upload data

If you try to submit data while offline, you'll receive an error saying you're not connected. Accela Mobile saves the update to the upload queue on your device.



Notes:

- After an item is saved to the upload queue, all subsequent updates will also go into the queue (whether data connectivity is available or not) until you sync the device. This ensures that automation events occur in the proper order.



- A red dot appears on top of **Recent** to indicate when data is queued and needs to be synced.
- Items in the queue do not automatically sync when a connection is available. This prevents partial syncs and data duplication when traveling through areas of intermittent connectivity.

To upload queued data

1. In the **Recent** (🕒) tab, select **Sync now**.



Note: If Accela Mobile is unable to connect, you'll be alerted that a connection is not available and to try again later.



Important: If Accela Mobile is able to connect but is not able to successfully upload an item from the queue, you can choose to either stop the sync or to skip the problem item and continue syncing the rest of the upload queue.

- If you choose to stop the sync, any unsynced items will remain in the queue, allowing you to try again later or attempt to resolve the error state.
- If you choose to skip the problem item and continue syncing the rest of the upload queue, the skipped update will not be written to the server. This cannot be undone.

Settings

Settings (⚙️) let you customize Accela Mobile using device-level preferences. It also displays the version of Accela Mobile that you are using on your device.

Drag to download

Toggle **Drag to download** on to activate swiping down in the inspections list or the records list to refresh the list and download any new data to your device—so that it will still be available when you do not have a data connection.

Checklists for Inspection Summary reports

You can set **Checklists for inspection summary reports** to either **Show all checklist items** or **Show only violations**.

Upload settings

Use **Upload settings** to configure upload preferences for groups, categories, image size, and timestamp format.

Error log

The **Error log** displays errors listed chronologically from most recent to oldest. **App data** is the amount of data (in MB) used by Accela Mobile.

Log out

Use **Log out** to log out of Accela Mobile.

Esri federated authentication

If your administrator has configured Esri federated authentication, you can connect to map services using a unique Esri (Environmental Systems Research Institute) account. Enter your Esri account user name and password. This is limited to only the communications between Accela Mobile and Esri.

Version number

The Accela Mobile version number is listed below the **Log out** option.