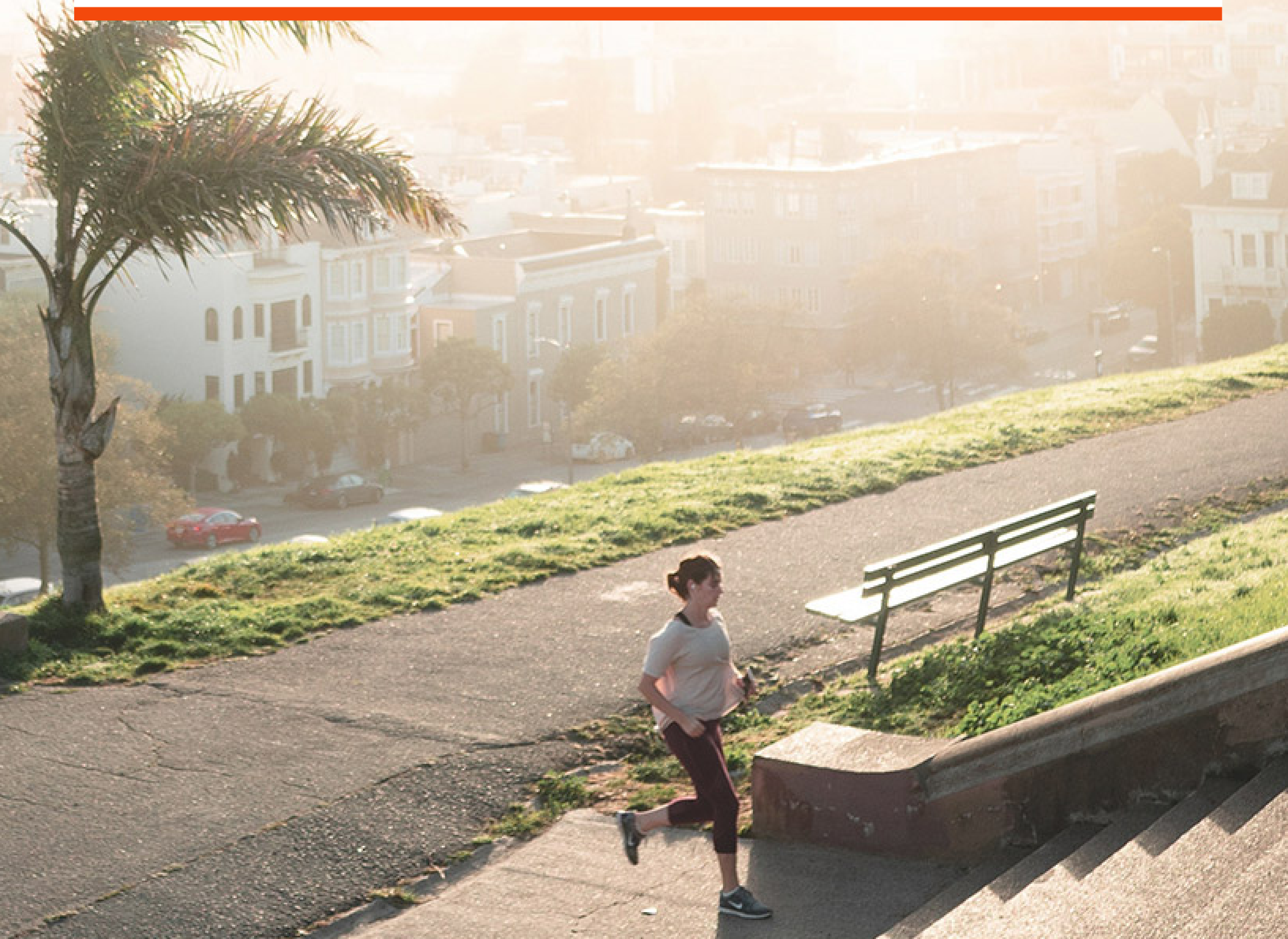
CENTRALSQUARE

Community Development Release Notes

19.3 HF18 premise



CENTRALSQUARE

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Thank you!

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Introduction

These release notes summarize the latest modifications to Community Development applications available for general distribution with the 19.3 hot fix releases and service packs for premise installations.

For support questions or issues, contact the CentralSquare support team at 1-800-292-4526, option 1, option 4, or log in to the CentralSquare support portal at support.centralsquare.com.

Important notices

Contractors State License Board (CSLB)—State of California

CSLB updated its security and is now blocking the encryption ciphers bundled with Microsoft Windows Server 2012 and earlier. The CSLB website now requires the more secure encryption ciphers used by Windows Server 2016.

Script updates

Before upgrading to 19.3 HF18 from 17.x or earlier, request assistance from the Community Development support team to review your script files for compatibility to ensure proper functionality after the upgrade. The support team will request assistance from the CentralSquare development team to complete this task. This task is a prerequisite for upgrading to 19.3 HF18 from 17.x or earlier.

Important: As part of the HF07 upgrade, your custom scripts should be reviewed to determine if they are affected by the payment transaction enhancement.

Upgrade requirements

Upgrade requirements for specific software products are:

- Community Development 19.3: corresponding 19.3 upgrades to Web Utilities & Maintenance (WUM) and all other licensed products.
- IIS: running .NET framework 4.6.2. The web.config file for each of your Community Development websites must have the targetFramework key set to 4.6.2.
- Bluebeam Revu users: IIS configured with TLS 1.2.

Recent Microsoft Windows security updates recommend that users disable TLS 1.0 and 1.1. If you require using HTTPS to access Community Development applications, disable TLS 1.0 and 1.1, and SSL 2.0 and 3.0. Community Development supports these changes in release 18.1 and later.

Mobile Inspection and Mobile Code (iTRAKiT)

Before you upgrade Mobile Inspection and Mobile Code, CentralSquare recommends that you contact the Community Development support team to resolve any questions you may have.

What's new

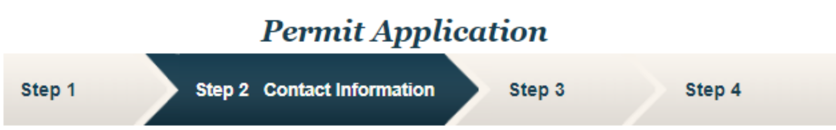
HF18

Additional ADA compliance enhancements for eTRAKiT public websites

CentralSquare has taken additional steps toward making eTRAKiT public websites compliant with Web Content Accessibility Guidelines (WCAG) 2.1 Level A and AA criteria. (Feature 524281)

Changes for this release include:

- Added a **SKIP TO MAIN CONTENT** link for screen reader use.
- Reformatted areas that used table tags inappropriately.
- Added functionality so that when citizens use keyboard navigation on **My Dashboard**, assistive technologies can focus on and read the filter and sort features.
- For address searches, modified the results box so that assistive technologies can read the addresses.
- Modified the contractor search page so that assistive technologies can read the number of results returned.
- Modified the **Log In** field so that assistive technologies announce the selected value.
- Modified permit application pages so that assistive technologies can convey the step status shown on the step status banner. For example, if a contractor is on step 2 of the process, a screen reader will indicate that step 1 is complete, step 2 is the current step, and steps 3–4 are yet to be completed.



- In multiple places in the application, made changes so that assistive technologies can read the buttons, such as **ACCEPT**, **CANCEL**, or **PRINT**.
- Updated additional places in the application to pass feedback and warning messages to screen readers.

Note: Changes you make through the custom theme editor or the cascading style sheet (CSS) might impact the accessibility of your sites. To maintain compliance, ensure your changes adhere to the WCAG.

HF17.2 (service pack 19.3.17.2)

Additional payment processor for eTRAKiT

You can now use the following payment processor for eTRAKiT payments:

- PayGOV.US (PBI 597982, PBI 597985)

This newly implemented processor is in addition to the payment processors implemented in previous hot fix releases since the fees, payments, and transactions enhancement in HF07. Supported payment processors as of HF17.2 are:

- Access Idaho
- Authorize.Net
- CentralSquare Payments
- Municipal Services Bureau (MSB)
- USAePay
- JetPay (also known as NCR)
- PayGOV.US
- Paymentus
- PayPal (Payflow Pro)
- Cardknox
- Elavon
- CardConnect

> **Warning:** eTRAKiT payments work only if you use one of the implemented payment processors. If you use a different payment processor, do not upgrade your production environment—online payments will not work. Support for additional payment processors will be provided in future releases.

Implementing online payments requires configuration in WUM and eTRAKiT Administrator, as well as with the payment processor. Each payment processor has specific requirements. Contact the support team for more information about setting up online payments through your preferred processor.

HF17

More ADA compliance enhancements for eTRAKiT public websites

CentralSquare has taken additional steps toward making eTRAKiT public websites compliant with Web Content Accessibility Guidelines (WCAG) 2.1 Level A and AA criteria. (Feature 524281)

Changes for this release include:

- Updated the **Send Username** link to pass feedback and warning messages to screen readers.
- On the dashboard, modified the tables to pass sorting information to screen readers.

Note: Changes you make through the custom theme editor or the cascading style sheet (CSS) might impact the accessibility of your sites. To maintain compliance, ensure your changes adhere to the WCAG.

HF16

Additional ADA compliance enhancements for eTRAKiT public websites

CentralSquare has taken additional steps towards compliance with Web Content Accessibility Guidelines (WCAG) 2.1 Level A and AA criteria. (Feature 524281)

Changes for this release include:

- Redesigned areas that used tables instead of more appropriate heading structure.
- Corrected field display issues such as overlapping headings, fields, and divider lines, as well as inconsistent font sizes, in various areas.
- Added label text for use by screen readers for:
  - On the dashboard, the collapse and expand buttons.
  - In the page header, the **Forgot Username** link.
- Added borders on some fill-in fields for better visibility.

Note: Changes you make through the custom theme editor or the cascading style sheet (CSS) might impact the accessibility of your sites. To maintain compliance, ensure your changes adhere to the WCAG.

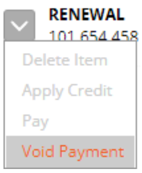
HF14

Void now available for "Transaction Unavailable" payments

You can now void fee payments that were processed in 19.3 HF06 or earlier. (SR 593744)

These payments are sometimes called *legacy payments*. For these payments, the **Financial Information** pane **Last Transaction Status** column says **Transaction Unavailable** because the payment was processed as an individual fee payment rather than a payment *transaction*.

To void these payments (payments designated as **Transaction Unavailable**), use the **Void Payment** function from the functions menu.



This function is available only for payments designated as **Transaction Unavailable**, processed in 19.3 HF06 or earlier.

> **Note:** To void payment *transactions* (fee payments processed in 19.3 HF07 or later), use the **Void** function in the **Payment Transaction Detail** window.

SQL Server 2019

SQL Server 2019 is now certified for use with Community Development. SQL Server 2017 and 2016 are still supported.

HF13

Additional payment processor for eTRAKiT

You can now use the following payment processor for eTRAKiT payments:

- Access Idaho (PBI 601328)

This newly implemented processor is in addition to the payment processors implemented in previous hot fix releases since the fees, payments, and transactions enhancement in HF07. Supported payment processors as of HF13 are:

- Access Idaho
- Authorize.Net
- CentralSquare Payments
- Municipal Services Bureau (MSB)

- USAePay
- JetPay (also known as NCR)
- Paymentus
- PayPal (Payflow Pro)
- Cardknox
- Elavon
- CardConnect

Warning: eTRAKiT payments work only if you use one of the implemented payment processors. If you use a different payment processor, do not upgrade your production environment—online payments will not work. Support for additional payment processors will be provided in future releases.

Implementing online payments requires configuration in WUM and eTRAKiT Administrator, as well as with the payment processor. Each payment processor has specific requirements. Contact the support team for more information about setting up online payments through your preferred processor.

User management enhancement

User privileges for users with the **USER** access level are now defined and assigned by group rather than being assigned individually per user. If you change privileges in the group, those changes apply to all users assigned to the group. (Feature 358894, SR 659420)

Groups apply only to users with the **USER** access level. By default, when you add a user with the **USER** access level, the new user has observer access only and must be assigned to a group for additional privileges.

Groups can be enabled (active) or not enabled (inactive). When a group is enabled, the privileges apply to users assigned to that group. When a group is not enabled, the privileges in that group are ignored.

If a user is assigned to multiple groups, privileges are cumulative. Any privilege granted in any group is available to the user.

Example: A user is in three groups. One group has the **PROJ : BOND_FULL_ACCESS** privilege, another group has **PROJ : CAN_EDIT_BOND**, and the third group has no bond privileges. The user will have full access to bonds functions.

To implement this enhancement, the following changes were made in WUM:

- Renamed the **User Preferences** area to **User Administration**.
- Renamed the **Group Privileges** area to **Group Administration**.
- Removed the **User Privileges** area.
- Under **User Administration**, added the **User Groups** page. Use this page to assign individual users to groups. The groups define access privileges for all users assigned to the group.
- On the **Group List** page, added the **Enabled** column. Select the check box in this column to enable a group (make the group active). Clear the check box to disable the group (make the group inactive).
- On the **User Names** page, removed the **Privileges** column with the **Edit** link. User privileges are now set by group on the **User Groups** page.

Example workflow for adding groups and privileges:

1. Set up groups:
   a. Determine the groups you want to have and the privileges you want for each group.
   b. Add the groups in **Group Administration** > **Group List**.
   c. Assign privileges to each group in **Group Administration** > *group name*.
2. Add users in **User Administration** > **User Names**.
3. Assign groups to each user in **User Administration** > **User Groups**.

During the upgrade to HF13, groups are automatically added for each user with the **USER** access level. These groups are named numerically (**Auto Group 1**, **Auto Group 2**, **Auto Group 3**, and so on). After the upgrade, you can rename these groups, or assign the users to other groups and then delete the groups that were added automatically.

New user privilege for linking to land records

The CAN LINK GEO RECORDS privilege was added in Projects and Planning, Permitting, Code Compliance, CRM, and Licensing. Users assigned this new privilege can link Projects and Planning, Permitting, Code Compliance, CRM, or Licensing records to land records without having the CAN EDIT privilege in Land Management. (Case 01553175, SR 583815)

Use the new CAN LINK GEO RECORDS privilege when you want users to be able to link activity records to land records but not perform other functions in Land Management. When you upgrade to this release, you should review privileges for all users and groups.

HF11

Requiring an address for eTRAKiT license applications

You can now require an address for license applications submitted in eTRAKiT. (SR 583745)

To require an address for license applications submitted in eTRAKiT, complete the following steps:

1. Log in to eTRAKiT Administrator.
2. Go to **Licensing** > **Application**.
3. In the **Display** section, **Required** field, select **Location Address**.

   If you already have options selected in the **Required** field, press **Ctrl** while you select **Location Address**.
4. Select **Save**.

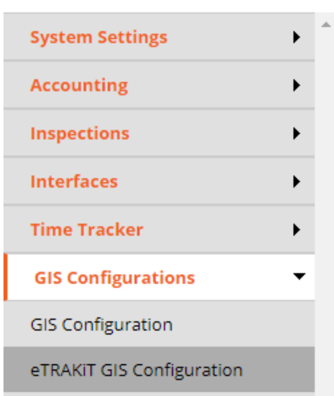
GIS configuration added to WUM

GIS configuration options were added to WUM in **System Settings** > **GIS Configurations**. (PBI 477498)

For existing customers, settings from your configuration file are automatically applied to the new page in WUM during the upgrade. For new customers, these options are set by a CentralSquare GIS Specialist during implementation and rarely require changes afterward.

Warning: ***Changes to these options can prevent GIS from working for your agency.*** If you want to change map services or map features, contact the support team.

The **GIS Configurations** area contains two pages: **GIS Configuration** and **eTRAKiT GIS Configuration**.



GIS Configuration

This page stores settings that control the maps and map features in the GIS module of Community Development. This page replaces the settings currently in the GIS configuration file. The new page includes options for Spatial Advisor, geotype layers, map services, map-related URLs, and more.

Spatial Advisor Enable Option (Community Development)

- **Enable Spatial Advisor for Community Development**: Spatial Advisor is included with a GIS Advanced license and is used to optimize business processes such as adding a review or fees to a permit. If you have GIS Advanced and you want to use Spatial Advisor, select this check box. If you do not want to use Spatial Advisor or if you do not have GIS Advanced, clear this check box.

Geotype Layers/Map Service Option for ArcGIS Online

- **Select GeoType Layers/Map Service Configuration Option**: Source of maps in Community Development. Select one of the following values:
  - **Default GIS Configuration**: Use a self-hosted ArcGIS server on premise.
  - **ArcGIS Online Configuration**: Use ArcGIS online maps hosted by Esri.

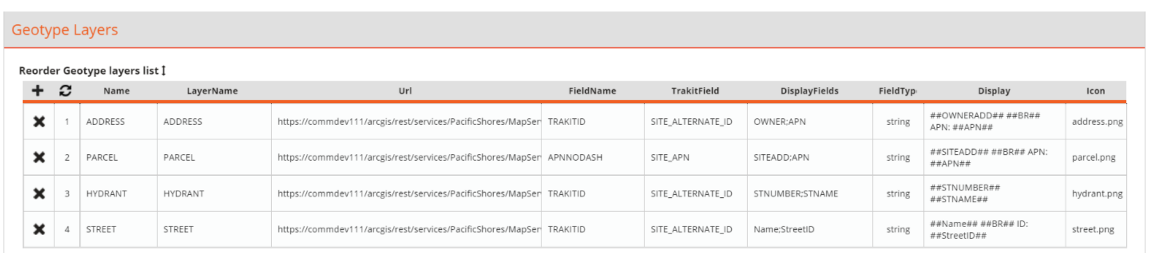
Geotype Layers

Use this section to link parcels from the map service to the Land Management record in the Community Development database. These options correspond to the Prmry_Types table, groupname GEO.

To add a layer, select **+**, and then complete the fields in the new row. Select **Save**.

To edit a layer, select a field in the row, and then make changes. Select **Save**.

To remove a layer, select **×** in the row, and then select **OK**. Select **Save**.



Geotype Layers

Reorder Geotype layers list ↕

+	⟳	Name	LayerName	Url	FieldName	TrakitField	DisplayFields	FieldTyp	Display	Icon
✖	1	ADDRESS	ADDRESS	https://commdev111/arcgis/rest/services/PacificShores/MapSer	TRAKITID	SITE_ALTERNATE_ID	OWNER;APN	string	##OWNERADD## ##BR## APN: ##APN##	address.png
✖	2	PARCEL	PARCEL	https://commdev111/arcgis/rest/services/PacificShores/MapSer	APNNODASH	SITE_APN	SITEADD;APN	string	##SITEADD## ##BR## APN: ##APN##	parcel.png
✖	3	HYDRANT	HYDRANT	https://commdev111/arcgis/rest/services/PacificShores/MapSer	TRAKITID	SITE_ALTERNATE_ID	STNUMBER;STNAME	string	##STNUMBER## ##STNAME##	hydrant.png
✖	4	STREET	STREET	https://commdev111/arcgis/rest/services/PacificShores/MapSer	TRAKITID	SITE_ALTERNATE_ID	Name;StreetID	string	##Name## ##BR## ID: ##StreetID##	street.png

Each layer includes the following details:

- **Name**: Name of the geotype layer. This should match the TypeName column in the Prmry_ Types database table.

- **LayerName**: Layer name from the map service.
- **Url**: REST (representational state transfer) endpoint URL that connects your Community Development and map service.
- **FieldName**: Connection between your Community Development database and map service per record.
- **TrakitField**: Name of the corresponding field in the Community Development database.
- **DisplayFields**: Name of fields from the map service when the multiselect feature is used.
- **FieldType**: Database field type. Usually, the value is **string**.
- **Display**: Metadata information from your map service when the multiselect feature is used. Enter **##** to identify a field from the map service.

  For the PARCEL geotype, SA_Street_ and AIN from the map service are used to display information when the multiselect feature is used.
- **Icon**: File name of the icon used in the map display in the GIS module in Community Development. In most cases, this is **parcel.png** for PARCEL geotype or **address.png** for ADDRESS geotype.

  If you want to use a custom icon, add the icon file to *Community Development root folder*/arcGIS/icons.

Map Services

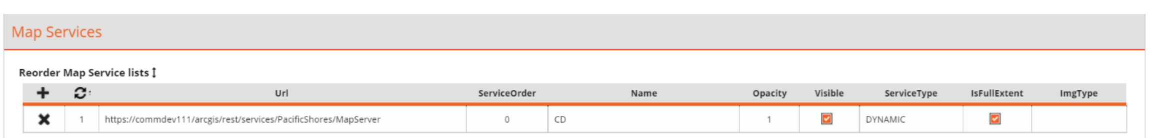
Use this section to manage the map services you use.

> **Important:** You can configure more than one map service. However, CentralSquare strongly recommends that you publish a single map service to include all the layers (geotype and non-geotype).

To add a service, select **+**, and then complete the fields in the new row. Select **Save**.

To edit a service, select a field in the row, and then make changes. Select **Save**.

To remove a service, select **×** in the row, and then select **OK**. Select **Save**.



Each service includes the following details:

- **Url**: URL of the map service.
- **ServiceOrder**: This is not used.

- **Name**: User-defined name of the map service. Do not use special characters or spaces in the name. However, you can use an underscore (_).
- **Opacity**: Degree of opacity. Enter a value from 0 to 1. A value of 0 indicates 0%—fully opaque, a value of 0.5 indicates 50% opacity, and a value of 1 indicates 100%—fully transparent.
- **Visible**: If you want this map service to appear when the map loads in the Community Development GIS module, select this check box. Generally, if you use multiple map services, you should select this check box.

  If you clear this check box, the map service is not visible until you open the GIS Table of Contents and manually select the map service.
- **ServiceType**: Enter one of the following values:
  - **DYNAMIC**: Draw maps when they are requested by the user.
  - **TILED**: Use cached images (tiles) to render the map.
- **IsFullExtent**: If you want the map to show as full extent when the map first loads, select this check box. Otherwise, clear this check box.
- **ImgType**: Type of image. The default value is **png32**. You can change this value or leave it blank, but CentralSquare recommends that you use the default value.

GIS Settings

Options in this section define REST endpoints, URLs, print layouts, proxy settings, and Google Maps settings. The options are:

- **Map Geometry ServiceURL**: Geometry service REST endpoint. This endpoint is used for geometric operations within Community Development, such as measuring distance and calculating the area of a land parcel.
- **Print URL**: Print service REST endpoint.
- **AGS URL**: Root URL for the ArcGIS server.
- **Map URL**: Map service REST endpoint used in Community Development as a primary service.
- **Feature Service URL**: Map service REST endpoint for spatial querying based on attributes. If you want to use a feature service for Advanced GIS Query operations, enter the feature service URL.
- **Route URL**: Map service REST endpoint for calculating the shortest distance between two locations. If you use the Route Inspections tool, enter the route URL to use.
- **GeoCode URL**: Map service REST endpoint for geocoding addresses.
- **OverView Map URL**: Map service REST endpoint which is used as an overview map. The overview map appears in GIS in the lower right corner of the map.

- **Print Layouts**: Print layouts supported by the ArcGIS server. To enter multiple print layouts, separate values with a semicolon (;).

  Example: MAP_ONLY;A3 Landscape;A3 Portrait;A4 Landscape;A4 Portrait;Letter ANSI A Landscape;Letter ANSI A Portrait;Tabloid ANSI B Landscape;Tabloid ANSI B Portrait

- **GIS URL**: Prefixed string referencing the ASP page that renders the map in Community Development. The value must be **arcgis/trakitMapv4.aspx**.
- **Google Maps Key**: Google map key used for Google Maps (map view) and Google Maps Street View. Your Community Development URL should be associated with this key.
- **Stacked Parcels**: Determines whether parcels are stacked on top of each other. To stack parcels, select **TRUE**.
- **Street View**: If the Google Maps key is available for Google Maps Street View, select **TRUE**. If you are not using Google Maps Street View, select **FALSE**.
- **Earth**: Do not use this field.
- **Always Use Proxy**: Proxy use indicator. If you select **TRUE**, the map service must authenticate with a token for access. Enter the user name and password in **System Settings** > **General**, in the **ArcGIS Admin Login Options** section. If your map service does not require authentication (user name and password), select **FALSE**.
- **Free Esri GeoCoder**: This field is not used and should be set to **FALSE**.
- **Initial Extent**: This field is not used and should be set to **FALSE**.
- **Spatial Connect**: Select **FALSE**.
- **IWA**: If you use Integrated Windows Authentication (IWA) to integrate your GIS server with Windows accounts, select **TRUE**. When a user tries to access a resource on the GIS server (REST endpoint), the GIS server redirects the request to the Identity Server to authorize the user's credentials.

  If you do not use IWA, select **FALSE**.

Base Map Settings

The option in this section defines the basemap type you use.

- **Base Map Type**: Basemap type you want to use in Community Development. Esri defines the available types. For a complete list of types, go to https://developers.arcgis.com/javascript/latest/api-reference/esri-Map.html#basemap.

Proxy List

Use options in this section to add valid proxy referrer URLs for the internal GIS proxy component, including all those required by the basemap.

To add a URL, select +, and then enter the URL in the new row. Select **Save**.

To edit a URL, select the URL, and then make changes. Select **Save**.

To remove a URL, select ✕ in the row, and then select **OK**. Select **Save**.

eTRAKiT GIS Configuration

Spatial Advisor Enable Option (eTRAKiT)

- **Enable Spatial Advisor for eTRAKiT**: Spatial Advisor is included with a GIS Advanced license and is used to optimize business processes, such as adding a review or fees to a permit. If you have GIS Advanced and you want to use Spatial Advisor with eTRAKiT, select this check box. If you do not want to use Spatial Advisor or if you do not have GIS Advanced, clear this check box.

  The Spatial Advisor URL must be publicly available. In other words, the URL should be accessible over the internet.

eTRAKiT GeoType Layers

This section shows the geotype layers you added on the **GIS Configuration** page *for reference only.* Do not add, change, or delete geotype layers from this page. To make any changes to geotype layers, go to **GIS Configurations** > **GIS Configuration** > **Geotype Layers**.

eTRAKiT GIS Settings

Options in this section define REST endpoints, URLs, print layouts, proxy settings, and Google Maps settings. The options are:

- **Map Service**: URL of the map service.
- **Map Geometry ServiceURL**: Geometry service REST endpoint. This service is used for geometric operations within Community Development, such as measuring distance and calculating the area of a parcel.
- **Print URL**: Print service REST endpoint.
- **Feature Service URL**: Map service REST endpoint for spatial querying based on attributes. If you want to use a feature service for Advanced GIS Query operations, enter the feature service URL.
- **GeoCode URL**: Map service REST endpoint for geocoding addresses.
- **Use GIS Proxy**: Proxy use indicator. If you select **TRUE**, add URLs in the **Proxy List** section.

- **Free Esri GeoCoder**: If you want to use the free geocoder from Esri, select **TRUE**. Note that the free geocoder has some limitations. If you do not want to use the free geocoder from Esri, select **FALSE**.

Proxy List

Use options in this section to add valid proxy referrer URLs for the internal GIS proxy component, including all those required by the basemap.

To add a URL, select +, and then enter the URL in the new row. Select **Save**.

To edit a URL, select the URL, and then make changes. Select **Save**.

To remove a URL, select × in the row, and then select **OK**. Select **Save**.

HF10

Additional payment processor for eTRAKiT

You can now use the following payment processor for eTRAKiT payments:

- Authorize.Net (PBI 593294)

This newly implemented processor is in addition to the payment processors implemented in HF09, HF08, and HF07.

> **Warning:** eTRAKiT payments work only if you use one of the implemented payment processors. If you use a different payment processor, do not upgrade your production environment—online payments will not work. Support for additional payment processors will be provided in future releases.

Implementing online payments requires configuration in WUM and eTRAKiT Administrator, as well as with the payment processor. Each payment processor has specific requirements. Contact the support team for more information about setting up online payments through your preferred processor.

HF09

Additional payment processors for eTRAKiT

You can now use the following payment processors for eTRAKiT payments:

- CentralSquare Payments (PBI 590604)
- Municipal Services Bureau (MSB) (PBI 493726)
- USAePay (PBI 493752)

These newly implemented processors are in addition to the payment processors implemented in HF08 and HF07.

> **Warning:** eTRAKiT payments work only if you use one of the implemented payment processors. If you use a different payment processor, do not upgrade your production environment—online payments will not work. Support for additional payment processors will be provided in future releases.

Implementing online payments requires configuration in WUM and eTRAKiT Administrator, as well as with the payment processor. Each payment processor has specific requirements. Contact the support team for more information about setting up online payments through your preferred processor.

Additional payment processors for over-the-counter payments

You can now use CardConnect for over-the-counter (OTC) payments in Community Development. (PBI 590620)

CardConnect requires that you use payment terminal devices, which must be set up following the instructions from CardConnect and the payment terminal device manufacturer.

In addition, WUM configuration and other setup steps are required, and you must select specific payment options when you process a payment in Community Development.

For more information about using CardConnect for OTC payments, contact the support team.

CardConnect changes for eTRAKiT payments

Changes were made to correct the redirect process in eTRAKiT after a user pays Entity Management application fees. (Case 01657838, SR 602286)

Previously, eTRAKiT showed the login page after a user paid Entity Management application fees. Now, eTRAKiT shows the payment details.

Important: If you use CardConnect to process payments made in eTRAKiT, you must log in to your CardPointe account and make the following change to your hosted payment page (HPP):

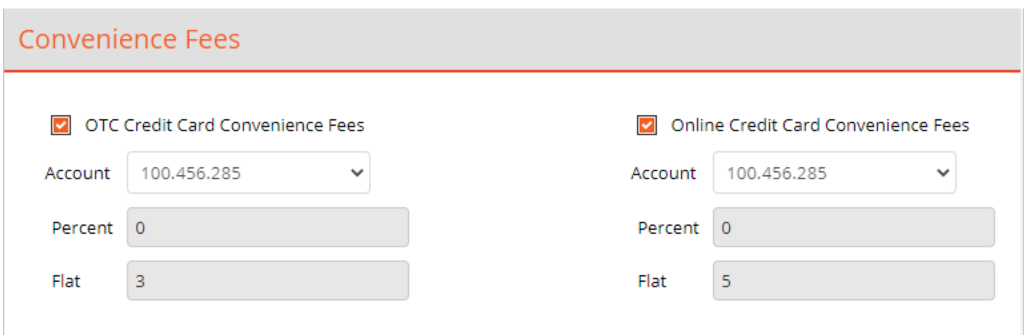
On the **Notifications** page, in the **Return to Website URL** field, enter ***your-eTRAKiT-URL*/gatewayReturn.aspx**, where *your-eTRAKiT-URL* is the URL of your eTRAKiT public website.

In addition, a change was made to force use of TLS 1.2 instead of earlier TLS versions.

Convenience fee enhancements

You can now set up separate convenience fee rates for over-the-counter (OTC) payments and online payments. (Case 01639197, SR 597008) For example, you can charge a 3% convenience fee for over-the-counter payments and a 2% convenience fee for online payments.

To implement this enhancement, options were added in WUM **System Settings** > **Accounting** > **Transactions** to provide separate entries for OTC payments and online payments.



To set up a convenience fee, select the corresponding check box. Then, select an internal account number. If you want to charge a percentage of the payment amount, enter the percentage in the **Percent** field. If you want to charge a flat fee, enter the amount in the **Flat** field. If you want to charge a percentage plus a flat fee, enter values in both **Percent** and **Flat**.

Note: The eCheck options on this page are not used. Convenience fees for eChecks are not supported by any of the payment processors that are implemented in Community Development.

Override Status now available for posted transactions

You can now override the status of a payment transaction that has a current status of **Posted**. (PBI 597189) Previously, you could not override the status if the payment transaction was already posted.

> **Note:** The **Override Status** function is available in Community Development only if the **Enable Manual Override** check box is selected in WUM **System Settings** > **Accounting** > **Transactions**, and only for users who have the system-level CAN OVERRIDE TRANSACTION STATUS privilege.

ADA compliance for eTRAKiT public websites

For eTRAKiT public websites, CentralSquare has taken significant steps towards compliance with Web Content Accessibility Guidelines (WCAG) 2.1 Level A and AA criteria. (Feature 524281)

Changes for this release include improved color contrast ratios for content, updates to search pages and table headers, and the addition of alternate text for images and links to better support screen readers and assistive technologies. Future releases will include additional changes to ensure eTRAKiT public websites fully meet the WCAG 2.1 Level AA accessibility compliance criteria.

> **Note:** Changes you make through the custom theme editor or the cascading style sheet (CSS) might impact the accessibility of your sites. You should ensure those changes adhere to the WCAG to maintain compliance.

HF08

Additional payment processors for eTRAKiT

You can now use one of the following payment processors for eTRAKiT payments:

- JetPay (also known as NCR)
- Paymentus
- PayPal (Payflow Pro)

These newly implemented processors are in addition to Cardknox, Elavon, and CardConnect, which were implemented in HF07.

> **Warning:** eTRAKiT payments work only if you use one of the implemented payment processors. If you use a different payment processor, do not upgrade your production environment—online payments will not work. Support for additional payment processors will be provided in future releases.

Implementing online payments requires configuration in WUM and eTRAKiT Administrator, as well as with the payment processor. Each payment processor has specific requirements. Contact the support team for more information about setting up online payments through your preferred processor. (PBI 493765, PBI 493760)

Update to invoice and receipt stored procedures

During the HF08 upgrade, stored procedures for standard Invoice and Receipt are automatically updated for compatibility with financial report changes made in HF07. (PBI 574454)

Because of this change, the stored procedure example for “All refunds” included in HF07 release notes for the fees enhancement was updated with additional lines of code that are needed if you make multiple refunds from a single fee. The update applies to HF07 and later. The following lines were added:

```
inner join PaymentTransactionSubfee

on SubFees.RECORDID = PaymentTransactionSubFee.RECORDID

and PaymentTransactionFee.ID = PaymentTransactionSubFee.TRANSACTIONFEEID
```

For more details about the stored procedure example, see the HF07 topics Updating your custom financial export and All refunds.

HF07

Fees, payments, and transactions enhancement

This release makes significant enhancements to the way you work with fees, payments, and payment transactions. With an improved structure and the ability to collect greater detail on your payment transactions, you have more control, easier workflow, and better error handling of transactions. (Feature 528205)

Warning:
With HF07, eTRAKiT payments work only if you use one of the following payment providers:

- Cardknox
- Elavon
- CardConnect

If you use a different payment provider, do not upgrade your production environment to HF07—online payments will not work. Support for additional payment providers will be provided in future releases.

You now have greater insight and ability to track the status of payments and refunds, view transaction history, and manage transaction status. Paying and refunding fees generates *payment* *transactions* that include all the fees paid at the same time with the same payment method. A payment transaction can include a single fee or multiple fees, and fees for a single record or multiple records.

Important: Adding funds to a trust account, paying a bond, or unpaying a bond does not generate a payment transaction, which means you cannot track and manage this type of payment in the same way as fee payments and refunds.

The following changes were made:

- WUM:
  - In System Settings > Accounting, added and reorganized pages to improve workflow.
  - In User Preferences > User Privileges, added privileges related to overriding transaction status, posting transactions, and refunding fees. Also changed the CAN UNPAY FEE privilege to CAN VOID TRANSACTION.
- Community Development:
  - Added details to the Financial Information pane, including a new **Transactions** tab.
  - Expanded and moved the Fee Information feature.
  - Enhanced the Payment Transactions feature.
  - Added the Payment Transaction Detail feature.
  - Added the Lock Fees associated to outstanding transactions check box in WUM to prevent payment on records with specific transaction statuses.
  - Changed how deposits are applied to payments.
  - Changed refunds to be processed as subfees.
  - Renamed the **Unpay** function to Void and redesigned how this function works.
  - Added the Post function.
  - Added the Override Status function.
  - Added the Check Status function.
- Financial reports and documents: Many financial reports and documents are affected by this enhancement.
- Date fields: Date fields are now stored as date and time, rather than date only. Searches by date need to be adjusted by extending the date range by one day.

  Example: If you want to find all fees paid on January 4, 2021, you must now search for a date range of 1/4/2021–1/5/2021, which is actually 1/4/2021 12:00 AM – 1/5/2021 12:00 AM. If you search for 1/4/2021–1/4/2021, no results are returned because the beginning date and time is the same as the ending date and time.

- eTRAKiT:
  - Removed the following sections from **Admin Home** preferences > **Applications/Online Payments** tab:
    - **Payment Gateway**. These fields were deprecated in a previous release and are now removed from the tab.
    - **Payment Processor**. Use new settings in WUM **System Settings** > **Accounting** > **Transactions** to lock records for fee payments and set automatic recovery options.
  - Removed the following sections from **Shopping Cart** preferences > **Cart** tab > **Payment** section:
    - **Checkout Options**. Modal payment forms are no longer used.
    - **Direct Pay**: These fields were deprecated in a previous release and are now removed from the tab.

Important: As part of the upgrade, your custom scripts should be reviewed to determine if they are affected by this enhancement.

In addition to the software functionality changes, the *Community Development User Guide* was updated significantly so that sections related to fees, receipts, and invoicing follow a more intuitive workflow. Also, details were expanded about some existing features such as bonds.

Web Utilities & Maintenance (WUM)

In **System Settings** > **Accounting**:

- Reordered items in the **Accounting** menu.
- Added the **Transactions** page:
  - Added the **Enable Manual Override** check box, which makes the **Override Status** function available to users with the new CAN OVERRIDE TRANSACTION STATUS privilege.
  - Added the **Lock Fees associated to outstanding transactions** check box, which controls whether you can pay fees (create fee transactions) on an activity record that has a transaction with a status of **AwaitingResponse** or **TimedOut**.
  - Added automatic recovery options for Cardknox, Elavon, and CardConnect payments made through eTRAKiT and Citizen Engagement.
  - Moved the **Convenience Fees** options to the **Transactions** page.
  - Moved the **Cashiering** section that contained payment methods to the **Transactions** page and renamed the section **Payment Methods**.

- Added the **Cash Register** page to manage transactions at the point of sale and over the counter for a more organized and improved workflow:
  - Moved the **Cash Register Options** section to the **Cash Register** page.
  - Added the **Receipt Number AutoGen Name** option.
  - Moved **Payment Configuration** options to the **Cash Register** page.
- Added the **Online** page so you can define settings for the payment vendor that processes payments made through eTRAKiT and Citizen Engagement.
- On the **Deposits** page, disabled the **Pay fees with deposits automatically (no prompt)** check box. This setting is no longer used. For more information about paying fees with deposits, see Deposits.

In **User Preferences** > **User Privileges**:

- Under **System**, added CAN OVERRIDE TRANSACTION STATUS and CAN POST ANY TRANSACTION
- Added CAN REFUND FEE in the following sections:
  - **Projects and Planning**
  - **Permitting**
  - **Code Compliance**
  - **Entity Management**
  - **Licensing**

  Note: When you upgrade to this release, by default, admin users are assigned this privilege. Review roles and user privileges in WUM to ensure that only appropriate personnel have this privilege.
- Changed the CAN UNPAY FEE privilege to CAN VOID TRANSACTION in the following sections:
  - **Projects and Planning**
  - **Permitting**
  - **Code Compliance**
  - **Entity Management**
  - **Licensing**

  Users who previously had the CAN UNPAY FEE privilege now have the CAN VOID FEE privilege

Community Development

Working with payment transactions

Paying and refunding fees generates *payment transactions* in Community Development. With payment transactions, you can track and manage the state of payments and refunds. A payment transaction can include a single fee or multiple fees, and fees for a single record or multiple records.

You can view payment transaction information and work with payment transactions from:

- **Payment Transactions** window, accessed from the **Favorites** menu. From this window, you can:
    - Search for payment transactions that meet certain criteria including cashier, activity type (such as permit), and date range.
    - Post transactions.
    - Open the **Payment Transaction Detail** window.
- **Payment Transaction Detail** window, accessed from the **Financial Information** pane or **Payment Transactions** window. From this window, you can:
    - View detailed information about a transaction, including transaction history.
    - Override the status of a transaction.
    - Void a transaction.
    - Check the status of a Cardknox, Elavon, or CardConnect transaction that does not have a status of **Posted**.

Financial Information pane

The following changes were made in the **Financial Information** pane:

- Removed the **Unpay** button. This function is replaced with the **Void** function in the new **Payment Transaction Detail** window.
- Removed information fees from the filter options.
- Added the **Last Transaction Status** and **Reference #** columns and removed the **Paid** and **Receipt** columns.
- Added a **Paid** indicator in the **Amount** column.
- In the **Description** column, added a link that opens the **Fee Information** feature.

  On the functions menu, removed **Fee Information**, which opened the Fee Item Information feature. This feature was renamed **Fee Information** and expanded.
- Added the **Transactions** tab, which lists payment transactions on the record and provides a link to the new **Payment Transaction Detail** window.

Important: Transaction details are available only for transactions created after you upgrade to release 19.3 HF07.

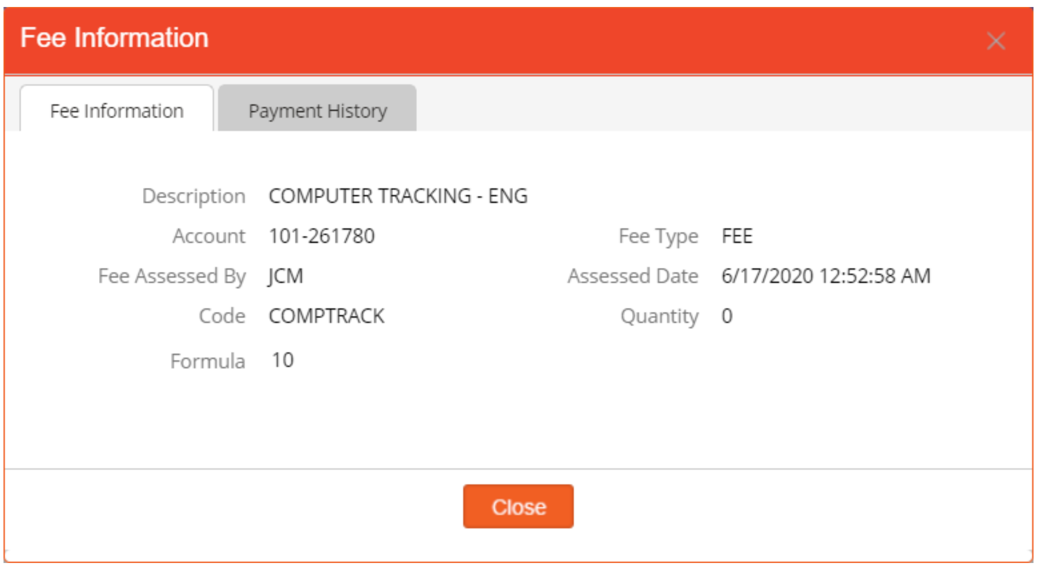
Fee Information

The Fee Information feature was expanded and moved.

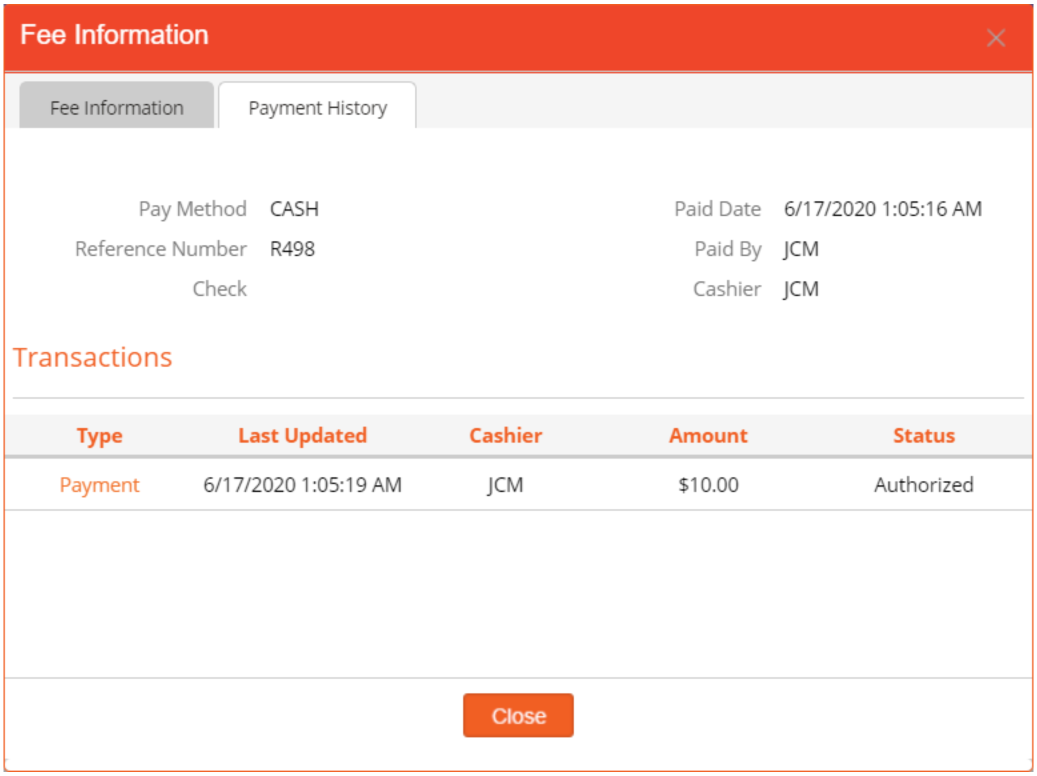
To open **Fee Information**, go to the **Financial Information** pane for a record with fees and select a fee's link in the **Description** column.

Fee Information now includes two tabs: **Fee Information** and **Payment History**.

Fee Information tab:



Payment History tab:



Payment Transactions feature

The **Payment Transactions** feature was enhanced so you can filter the transactions list, check the status of certain transactions, and post transactions.

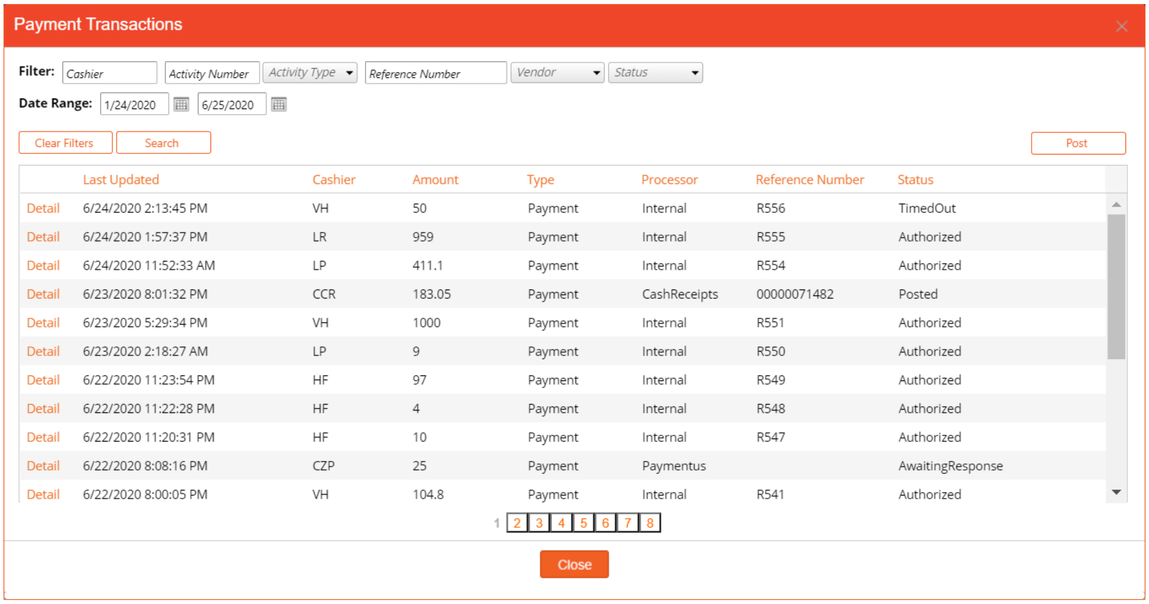
Note: To use this feature, you must first add **Payment Transactions** to your **Favorites** list.

To open the **Payment Transactions** listing, point to **Favorites** and then select **Payment Transactions**.

When you first open the window, transactions processed by you on the current day appear in the listing. To find other transactions, enter filter criteria and then select **Search**.

To post transactions, select **Post**. For more information about posting transactions, see Posting transactions.

Check Status appears next to Cardknox, Elavon, and CardConnect transactions that do not have a status of **Posted**. For more information about checking transaction status, see Checking transaction status.



Payment Transaction Detail window

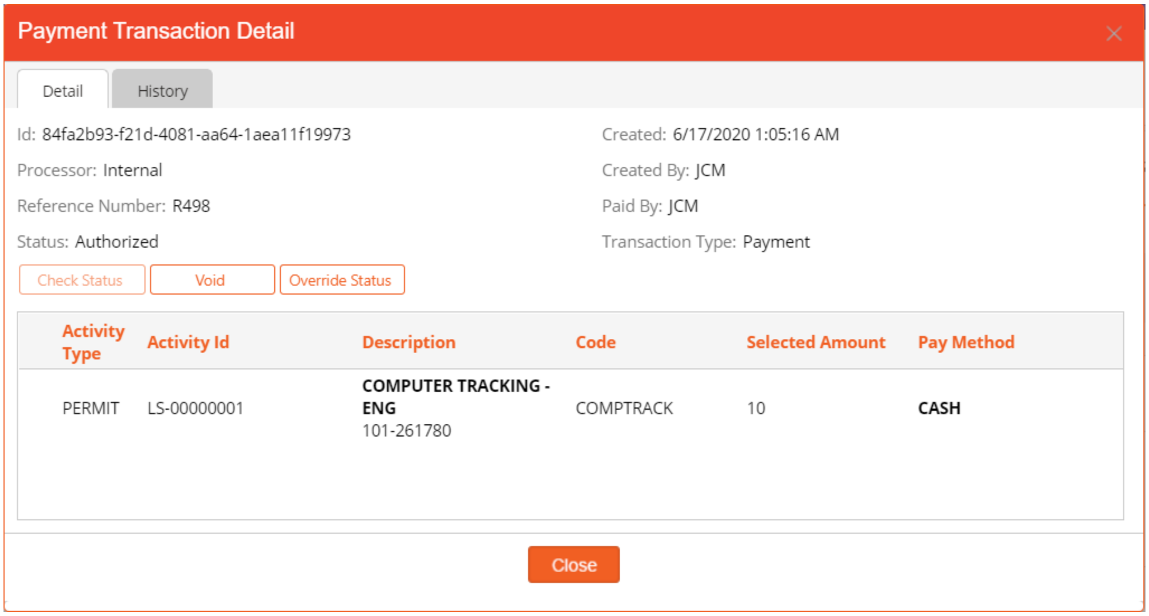
The **Payment Transaction Detail** window was added so you can view details for a single payment transaction and access related functions. From this window, you can:

- View transaction details
- View transaction history
- Check the status of a transaction
- Void a transaction
- Override transaction status

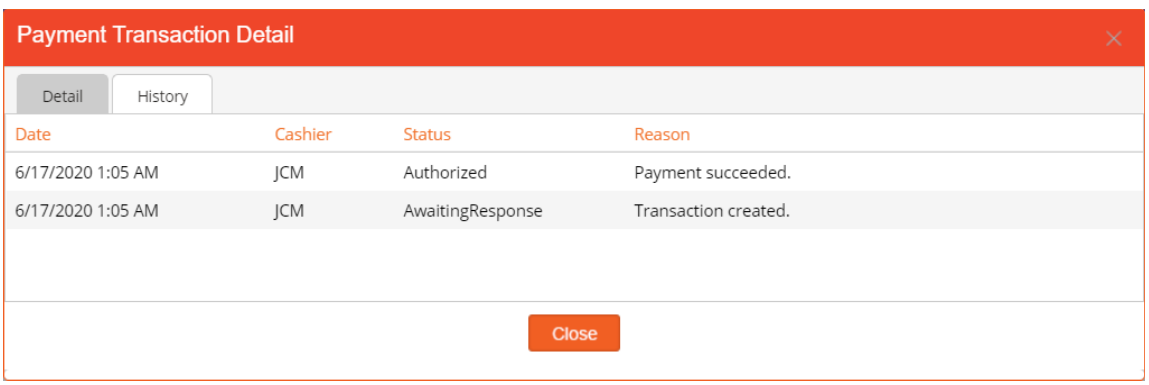
Access the **Payment Transaction Detail** window using one of the following methods:

- From the **Financial Information** pane:
  - On the **Fees** tab, select the link in the **Last Transaction Status** column.
  - On the **Transactions** tab, select the link in the **Type** column.
- In the **Payment Transactions** window, select the **Detail** link.

The **Payment Transaction Detail** window includes two tabs: **Detail** and **History**. The **Detail** tab provides information about a specific payment transaction as well as access to Check Status, Void, and Override Status functions.



The **Payment Transaction Detail** window's **History** tab lists each status change for the payment transaction.



Paying fees

The new **Lock Fees associated to outstanding transactions** check box in WUM controls whether you can pay fees (create fee transactions) on an activity record that has a transaction with a status of **AwaitingResponse** or **TimedOut**.

Deposits

The **Pay fees with deposits automatically (no prompt)** check box in WUM is no longer used. Instead, when you select the **Pay** button in the **Financial Information** pane, deposits are listed automatically in the **Payment** dialog box. You can select whether to use each deposit that is listed.

Funds are applied first from the largest deposit amount to the largest fee and then to the remaining fees you selected in order of largest to smallest. If the largest deposit reaches a $0 balance and additional fees remain, the next largest deposit is used and applied to the fees in the same order (largest to smallest). This process continues until all fees you selected are paid. If the largest deposit has enough funds to pay all the fees, other deposits are not used.

Deposits can be used to pay fees on the record they are associated with only. For example, deposits on permit ADD-0050 can only be used to pay fees on that permit. You could not use deposits from permit ADD-0050 to pay fees on a project, license, or other permit.

Refunds

Refunds are now processed as subfees of the fee you are refunding.

Refunding a payment generates a new payment transaction that you can void or post. After you void or post a refund, the refund can no longer be updated.

Unpaying and voiding transactions

The Unpay feature was removed and replaced with the Void feature. Previously, the Unpay feature was used to correct a data entry mistake made during the fee collection process *for a single fee*. The new Void feature cancels a payment transaction—which can contain one or more fee payments—before the transaction is posted.

> **Tip:** If the payment was already posted, use the **Refund** function to return funds to the payer.

To void a transaction, you must have the CAN VOID TRANSACTION privilege *for each module involved in the transaction*. For example, if the transaction includes payments on both a permit and a project, you must have the CAN VOID TRANSACTION privilege in both Permitting and Projects and Planning. Users who previously had the CAN UNPAY FEE privilege now have the CAN VOID FEE privilege.

Posting transactions

Use the **Post** function to close out your cash drawer at the end of the day or end of a shift. The **Post** function is available in the **Payment Transactions** window.

The **Post** function processes transactions with a status of **Authorized** that meet the search criteria you entered in the **Payment Transactions** window and that you have access to post. WUM privileges determine whether you can post only transactions you processed, or transactions processed by you or other cashiers. You cannot add or remove transactions before posting.

Post does not post to external applications, including third parties.

The **Post** function updates transactions as follows:

- Changes the transaction status to **Posted**.
- Locks the transaction so that it cannot be changed or voided.
- Updates the last transaction status date and time.
- Prepares the transaction for inclusion in financial exports to external applications, if used by your agency.

Payment transaction status

Payment transactions have one of the following status values:

- **Authorized**: The payment processor completed the transaction. Fees, including convenience fees if applicable, are paid.
- **Posted**: The transaction was authorized and then posted in Community Development. Fees, including convenience fees if applicable, are paid.
- **AwaitingResponse**: The payment was initiated but the application has not received a response from the payment vendor. Fees, including convenience fees if applicable, are unpaid.
- **TimedOut**: Community Development did not receive a response from the payment processor within the time allotted. Fees, including convenience fees if applicable, are unpaid.
- **Failed**: The payment was not processed due to bad data, server timeout, or other issue. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Voided**: The transaction was voided in Community Development. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Canceled**: The user canceled the transaction before it was completed or the transaction could not be located by the third party. Fees are unpaid. Any convenience fees charged with the transaction are deleted.
- **Declined**: The payment processor declined (refused to accept) the transaction. Fees are unpaid. Any convenience fees charged with the transaction are deleted.

You can override a transaction’s status. You can also check the status of Cardknox, Elavon, and CardConnect transactions that do not have a status of **Posted**.

Overriding transaction status

Use the **Override Status** function to correct an entry error or to manually synchronize the Community Development transaction status with the payment processor transaction status.

> **Tip:** This function is available only if the **Enable Manual Override** check box is selected in WUM **System Settings** > **Accounting** > **Transactions**.

The **Override Status** function is available in the **Payment Transaction Detail** window.

Checking transaction status

Use the **Check Status** function to synchronize a transaction with updates from the payment processor. **Check Status** is available only for Cardknox, Elavon, and CardConnect transactions that do not have a status of **Posted**.

The **Check Status** function is available in the **Payment Transactions** window and in the **Payment Transaction Detail** window.

When you select **Check Status**, Community Development contacts your payment provider (Cardknox, Elavon, or CardConnect) for the transaction status. If the payment provider status matches the Community Development status, a message appears indicating the status is up to date. If the payment provider status is different than the Community Development status, Community Development updates the status to match the payment provider and displays a message indicating the transaction was updated.

eTRAKiT

Two sections were removed from eTRAKiT Administrator because the settings are now configurable in WUM. In **Admin Home** preferences > **Applications/Online Payments** tab, the following sections were removed:

- **Payment Gateway**. These fields were deprecated in eTRAKiT Administrator in a previous release and are now removed from the tab. Use settings in WUM **System Settings** > **Accounting** > **Online** to define the configuration for your payment vendor.
- **Payment Processor**. Use new settings in WUM **System Settings** > **Accounting** > **Transactions** to lock records for fee payments and set automatic recovery options. Settings from eTRAKiT Administrator are moved to WUM during the upgrade.

In addition, sections were removed from eTRAKiT Administrator **Shopping Cart** preferences > **Cart** tab > **Payment** section because these features are no longer used:

- **Checkout Options**. Modal payment forms are no longer used.
- **Direct Pay**: These fields were deprecated in a previous release and are now removed from the tab.

Financial reports and documents

The following standard reports and documents are affected by this enhancement:

Financial reports

- Account Activity by Module
- Account Activity for Permits
- Payments by Account by Module
- Payments by Account by Prefix

- Account Activity for Permits—Address Info
- Account Activity for Project
- Account Activity for Project—Selected Accounts
- Account Activity Summary
- Account Activity Summary Excluding Refunds
- Detailed Payments
- Fees Paid by Module by Account
- Outstanding Case Fees
- Outstanding License Fees
- Outstanding Permit Fees
- Payments by Cashier
- Payments by Cashier—Excluding Refunds
- Payments by Pay Method
- Payments by Receipt Number
- Payments by Record Number
- Permit Payments of Selected Fee
- Refunds by Date
- Summary of Case Fees Paid by Account
- Summary of Permit Fees Paid by Account
- Summary of Project Fees Paid by Account

Documents

- AEC Details
- Cash Register Invoice
- Cash Register Receipt
- Case Details
- Case Details—No Attachments
- Permit Details
- Project Details

Updating your custom financial export

Locate the stored procedure that you use to create data for financial export. Each stored procedure has a section that creates a temporary table for output. The following examples can assist you in modifying your custom Financial Export. But, it is a guide only and might not match your custom export exactly.

Note: If you need assistance updating your financial export, contact CentralSquare.

Important: Date fields are now stored as date and time, rather than date only. Searches by date need to be adjusted by extending the date range by one day. For more information, see Database changes.

- Standalone fees: standalone fees are fees that do not have subfees and were paid in full in one transaction. **No changes are required for extracting standalone fees.**

```
select Fees.ACTIVITYID
              ,NULL [PARENT_DESCRIPTION]
              ,Fees.DESCRIPTION
```

```
                  ,PAID_AMOUNT
                  ,ACCOUNT
                  ,PAID_DATE
                  ,PAY_METHOD
                  ,RECEIPT_NO
                  ,CHECK_NO
                  ,COLLECTED_BY
                  ,PAID_BY
from Fees
where DETAIL = 0
and ISNULL(PAID,0) = 1
and PAID_AMOUNT > 0
```

- All subfees and credits, excluding refunds:

```
select SubFees.ActivityID
                  ,Fees.DESCRIPTION
                  ,SubFees.DESCRIPTION
                  ,CASE WHEN SUBFEETYPE = 'CREDIT' THEN SubFees.AMOUNT *
-1 ELSE SubFees.AMOUNT END
                  ,SubFees.ACCOUNT
                  ,PAID_DATE
                  ,PAY_METHOD
                  ,RECEIPT_NO
                  ,CHECK_NO
                  ,COLLECTED_BY
                  ,PAID_BY
from SubFees inner join Fees
on PARENTID = Fees.RECORDID
where DETAIL = 1
and ISNULL(SubFees.PAID,0) = 1
and SubFees.AMOUNT > 0
                  and SUBFEETYPE <> 'REFUND'
```

- All refunds

```
select SubFees.ActivityID
              ,Fees.DESCRIPTION
              ,SubFees.DESCRIPTION
              ,SubFees.AMOUNT      * -1
              ,SubFees.ACCOUNT
              ,CONVERT(date, PaymentTransaction.Date)
              ,PaymentTransactionFee.PaymentMethod
              ,PaymentTransaction.ReceiptNumber
              ,PaymentTransactionFee.PaymentMethodDetail
              ,SubFees.ASSESSED_BY
              ,PaymentTransaction.PaidBy
from SubFees inner join Fees
on Fees.RECORDID = SubFees.PARENTID
inner join  PaymentTransactionFee
on SubFees.ActivityID = PaymentTransactionFee.ActivityId
and SubFees.PARENTID = PaymentTransactionFee.RecordId
inner join PaymentTransactionSubfee
on SubFees.RECORDID = PaymentTransactionSubFee.RECORDID
and PaymentTransactionFee.ID =
PaymentTransactionSubFee.TRANSACTIONFEEID
inner join PaymentTransaction
on PaymentTransaction.ID = PaymentTransactionFee.TransactionId
and PaymentTransaction.TypeId = 2
where Fees.DETAIL = 1
and ISNULL(SubFees.PAID,0) = 1
and SubFees.AMOUNT > 0
and SUBFEETYPE = 'REFUND'
```

Download error logs

You can now download critical error and other logs for Community Development or WUM to provide to the Community Development support team when you create a support ticket. (PBI 569520)

To download logs, go to WUM **System Settings** > **System Settings** > **General**. In the **Download Logs Folder** section, select the **Download Logs** button for the application—Community Development or Community Development Admin (WUM). All logs that are available are downloaded as a ZIP file to the location you choose. By default, the ZIP file name is *application_* logs*_yyyy_month_dd_time*.

Support for CardConnect

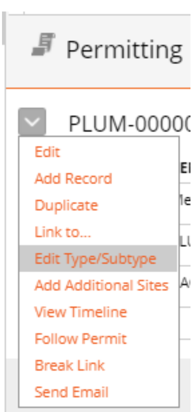
You can now use CardConnect to process payments made in eTRAKiT. Using CardConnect requires setup in WUM, on your web server, and through your CardConnect account. If you want to use CardConnect to process eTRAKiT payments, contact the Community Development support team for configuration details. (PBI 571818)

HF06

Edit Type/Subtype function added

You can now change the type or subtype for a record. (PBI 573423, PBI 573433) This feature was previously available in Community Development, but removed in 19.3 HF04. Now, the Edit Type/Subtype feature is available again, with enhancements. You can choose whether this feature is used at your agency.

In Community Development, the **Edit Type/Subtype** function was added to the functions menu in the main information pane in Land Management, Projects and Planning, Permitting, Licensing, Code Compliance, CRM, and Entity Management.



Note: In Land Management, the option is **Edit Type**. Land records do not have subtypes.

When you change the type or subtype for a record:

- Automatic workflows are disabled. All fees, inspections, reviews, and contacts that would be added automatically to a new record must be added manually after you change the type or subtype.
- The prefix in the record number does *not* change.
- The change is logged in audit history.

In WUM, the **Allow users to edit type and subtype** check box was added in each module so that you can choose whether to make the **Edit Type/Subtype** function available. If you select the check box, the **Edit Type/Subtype** function is available in the Community Development module. If you clear the check box, the function is not available in the Community Development module. By default with this upgrade, the check box is selected in each module.

In WUM, the new check box is in **Module Configuration**:

- **Land Management** > **Preferences**
- **Permitting** > **Preferences** > **Preferences**
- **Projects and Planning** > **Preferences** > **Preferences**
- **Code Compliance** > **Preferences** > **Preferences**
- **Licensing** > **Preferences** > **Preferences**
- **CRM** > **Preferences**
- **Entity Management** > **Preferences** > **AutoGen Options**

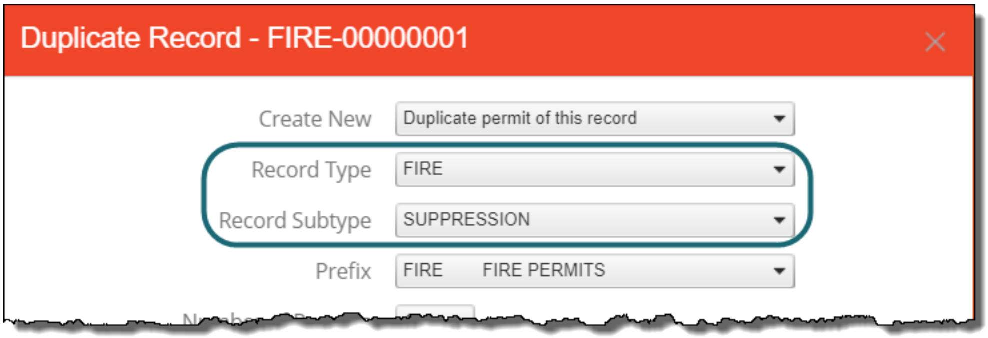
Revised Duplicate functionality

The **Duplicate** function now enables you to assign the record type and subtype for the new record so that the type or subtype can be different than the original record. (Case 01547805, SR 547241)

> **Note:** **Duplicate** functionality did not change in CRM or Entity Management.

Changing the record type and subtype is particularly useful when a citizen submits an application or issue with an incorrect type or subtype through eTRAKiT. You can duplicate the record to retain site information, contacts, attachments, and other data entered by the applicant while assigning the correct type or subtype to implement automatic inspections, reviews, and other workflow items.

When you select **Duplicate** for a permit, project, license, or code case, the **Duplicate Record** window includes options for **Record Type** and **Record Subtype**.



If you do not change the type or subtype, the duplicate feature works as it did before. Select the components you want to copy to the new record and then select **Add**.

If you change the type or subtype, you can choose certain components to copy, but other components are not available. The following components cannot be copied to the new record:

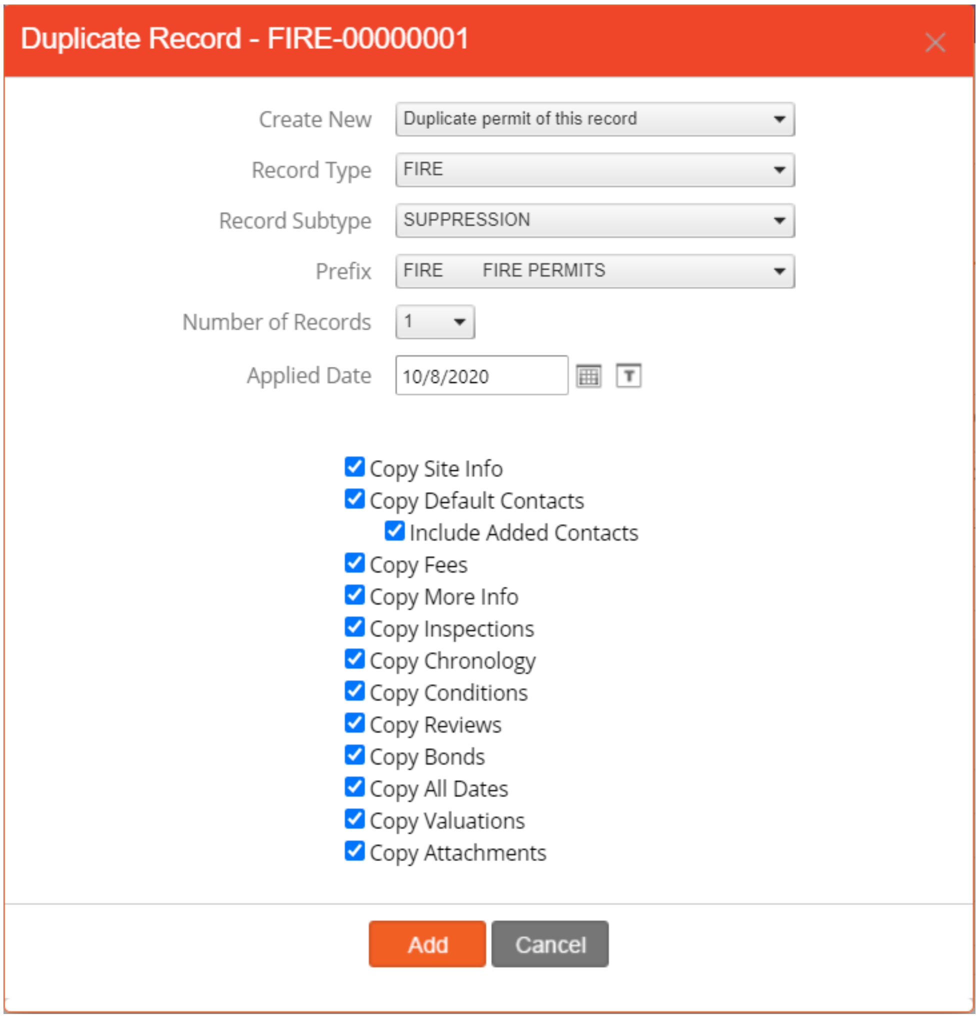
- Unpaid fees. Paid fees are copied to the new record, but unpaid fees are not.
- Inspections.
- Chronology.
- Conditions.
- Reviews.
- Unpaid bonds. Paid bonds are copied to the new record, but unpaid bonds are not.

After you select **Add** to create the new record, any automatic fees, inspections, reviews, or other workflow items defined in WUM for the record type and subtype are added to the new record.

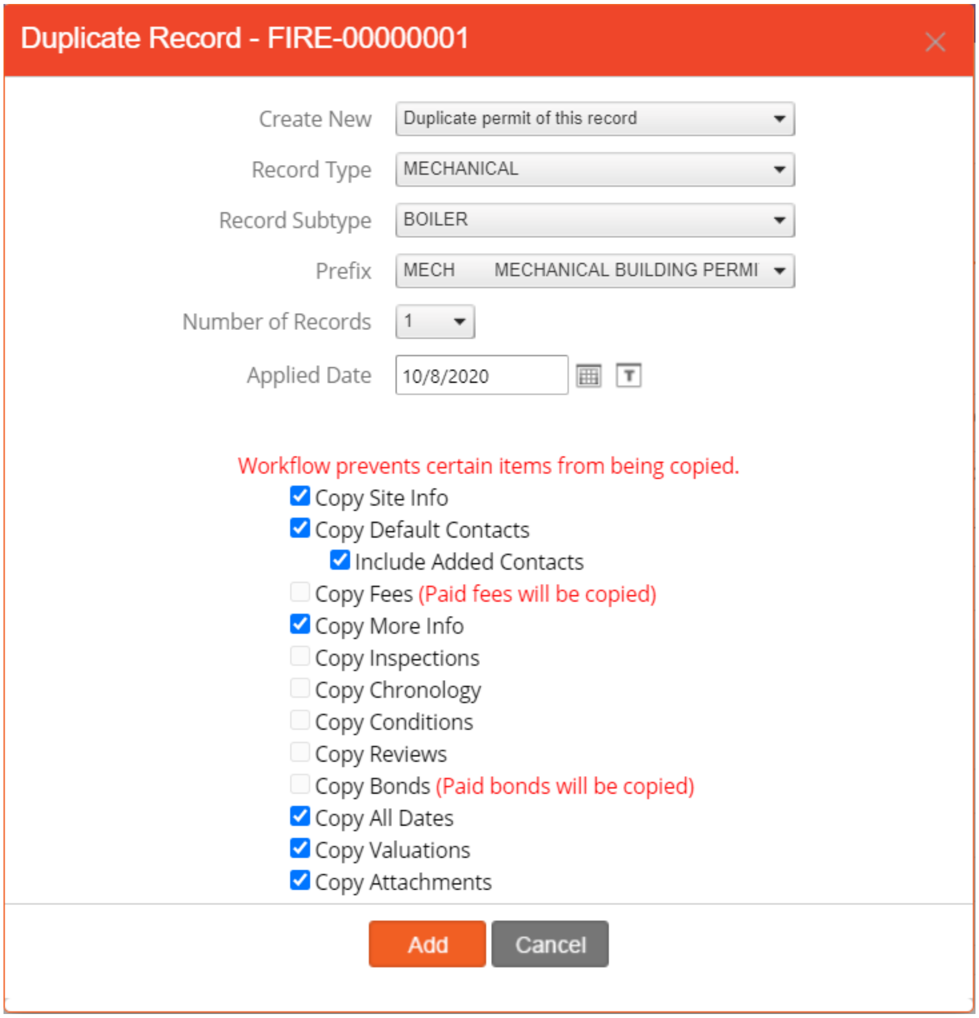
The original record remains in Community Development with all its information, including paid fees and bonds. You might need to adjust the original record as follows, according to your agency's policies:

- Manually close or delete the original record.
- Unpay the paid fees and paid bonds.

Example 1: You duplicate a permit and do not change the type and subtype. Because the type and subtype did not change, all components are available to copy to the new record.



Example 2: You duplicate a permit and change the type or subtype. Because the type or subtype changed, some components are not available to copy to the new record.



HF05

eTRAKiT contact-based views

For your eTRAKiT public website, you can now customize user views based on a public registered user's role (contact type) on a record. For example, you can specify that different details appear for the applicant, owner, and contractor on a permit. (PBI 524276)

To implement this enhancement, use the following new options in WUM and eTRAKiT Administrator:

- In WUM, use the new **eTRAKiT Roles** page in **Module Configuration** to select which contact types you want to configure. The new page was added in Land Management, Permitting, Projects and Planning, Code Compliance, Licensing, and AEC.
- In eTRAKiT Administrator, use new fields to define views for each contact type you selected on the WUM **eTRAKiT Roles** page. The following fields were added on the **General** tab's **Display** section in Permitting, Projects and Planning, Licensing, Entity Management, Parcel, and Code Compliance:
    - **Public Filtering**: Select **True** to configure which tabs are visible to public registered users based on their contact type for a particular activity. The tabs you select are visible when a user views details for a record on your eTRAKiT public website. When you select **True**, this field works with the **Contact Type** and **Visible Fields** fields. To show default fields (defined in the **Public Registered** field) for all contact types, select **False**.
    - **Contact Type**: Select the contact type you want to configure. The contact types in the drop-down list are the contact types selected in WUM **Module Configuration** > *module* > **eTRAKiT Roles**. Contacts are matched to a type based on name, address, and email address. Name, address, and email address must all be completed for the application to find a match.
    - **Visible Fields**: Select the tabs you want to be visible for the contact type selected in **Contact Type**. Generally, the tabs correspond to details on the information panes in Community Development and vary depending on the module. You can select multiple options in this field.

      Notes:

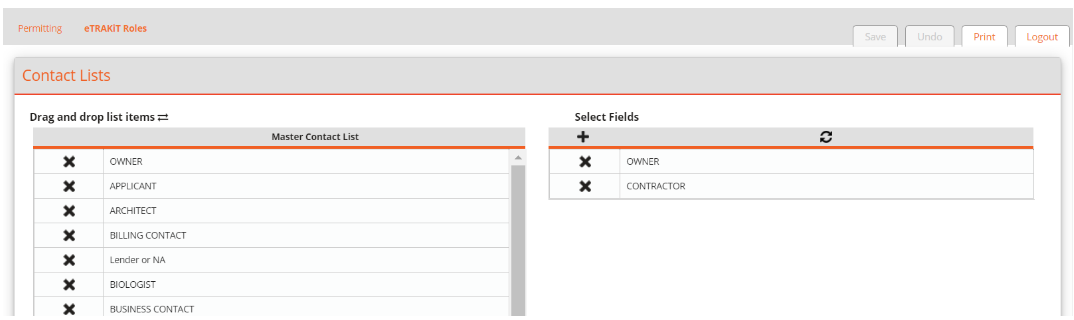
      - If you select **No Display Information**, only a blank module information tab is visible.
      - If you select **Default Display Information**, the tabs selected in the **Public Registered** field are visible for public registered users as well as custom screens and fields specified by the **Display Custom Screens in Search Results** check box in **Admin Home** > **Search Format** link. This is the default value when you add a contact type on the WUM **eTRAKiT Roles** page or if you clear all selections in **Visible Fields**.

- If you want public registered users to be able to schedule and cancel inspections, select **Inspection Information**. Public registered users can schedule and cancel inspections only if they have access to this tab.
- When configuring multiple contact types, you do not need to save in between selections. But be sure to select **Save** before you leave the page.

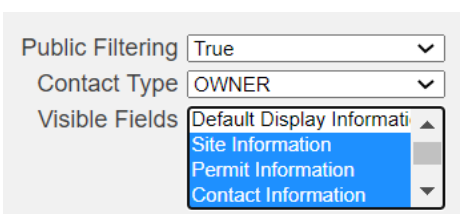
Example:

You complete the following setup:

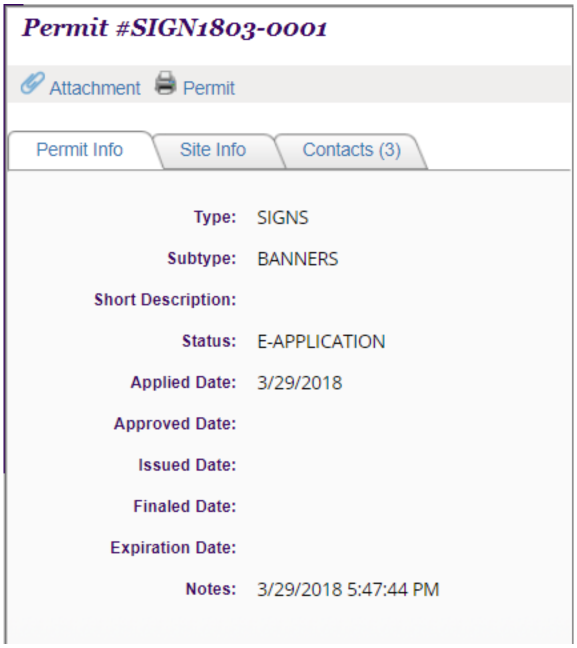
1. In WUM **Module Configuration** > **Permitting** > **eTRAKiT Roles**, you select **OWNER** and **CONTRACTOR** as contact types you want to configure.



2. In eTRAKiT Administrator **Permitting** > **General** tab > **Display** section, you make the following selections:
   - **Public Filtering**: Select **True**.
   - **Contact Type**: Select **OWNER**.
   - **Visible Fields**: Select **Site Information**, **Permit Information**, and **Contact Information**.



On your eTRAKiT public website, Joe User logs in as a public user. He views a permit where he is the owner and sees the **Permit Info**, **Site Info**, and **Contacts** tabs.



Other details, such as payment and inspection information, are not available.

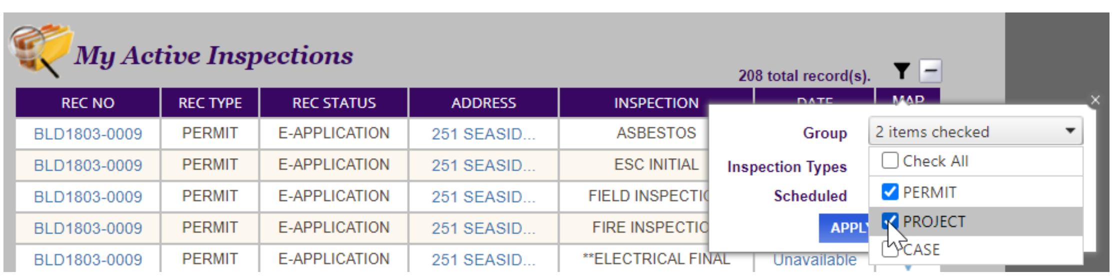
eTRAKiT dashboard filters

The dashboard on eTRAKiT public websites now includes filters so that registered users can narrow the list of items to view. (PBI 528410)

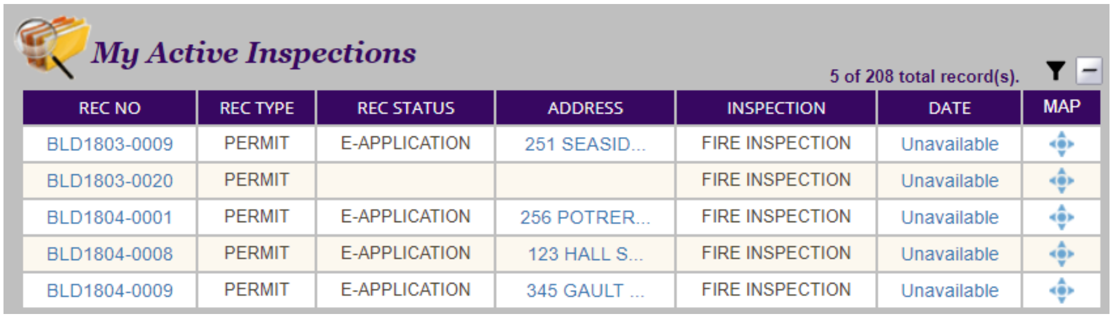
To use this feature, users select the filter icon, select filter options, and then select **APPLY**.

The filter function includes the following features:

- Users can select multiple options in each filter drop-down list. Select the drop-down list, select one or more check boxes, and then select outside the drop-down list. The drop-down list shows the number of items selected.



- A counter shows the number of records shown and the total number of records. If all records are shown, only the total number of records appears.



My Active Inspections

5 of 208 total record(s).

REC NO	REC TYPE	REC STATUS	ADDRESS	INSPECTION	DATE	MAP
BLD1803-0009	PERMIT	E-APPLICATION	251 SEASID...	FIRE INSPECTION	Unavailable	
BLD1803-0020	PERMIT			FIRE INSPECTION	Unavailable	
BLD1804-0001	PERMIT	E-APPLICATION	256 POTRER...	FIRE INSPECTION	Unavailable	
BLD1804-0008	PERMIT	E-APPLICATION	123 HALL S...	FIRE INSPECTION	Unavailable	
BLD1804-0009	PERMIT	E-APPLICATION	345 GAULT ...	FIRE INSPECTION	Unavailable	

- To clear filters, select and then select **CLEAR**.
- To close the filter options box without applying filters, select .

The filters in the following sections are record type, record subtype, and record status:

- **My Active Permits**
- **My Active Projects**
- **My Active Licenses**
- **My Active Violations**
- **My Expired Permits**

The filter in the following sections is record type:

- **My Open Permit Applications**
- **My Open Project Applications**
- **My Open License Applications**

The filters in the following section are group (for contractors only), inspection type, and scheduled:

- **My Active Inspections**

Select the **Scheduled** check box to view inspections that are scheduled. Clear the **Scheduled** check box to view all inspections.

There are no filters in the **My Active Complaints** and **My Licenses For Renewals** sections.

New Import from GIS feature

The Import from GIS feature was added to the functions menu in Land Management. Use this feature to add parcel data from GIS to a new Land Management record in Community Development. (453946)

Before you can use this feature, set up the **Parcels** geotype in WUM **System Settings** > **Interfaces** > **Spatial Connect**.

To use the Import from GIS feature, complete the following steps:

1. Log in to Community Development.
2. Go to Land Management.
3. From the main information pane's functions menu, select **Import from GIS**.
4. In the **Search** field, enter the APN (assessor parcel number) of the parcel you want to add to Community Development.
5. Select **GO**.
6. A message appears indicating the status of the import, which can be one of the following scenarios:
   - Parcel added to Community Development: The parcel was not in Community Development but was in GIS. The parcel data was imported.
   - Parcel exists: The parcel already exists in the Community Development database, so no parcel data was imported. Search by parcel (APN) number to find the existing record.
   - Parcel does not exist in GIS: The parcel is not in Community Development or GIS, so no parcel data was imported. Verify the APN.

   Select **OK** to close the message.
7. To close the dialog box, select ×.

In addition to adding the Import from GIS feature, the following changes were made in Community Development:

- In the **Global Search** dialog box, removed the **Search GIS** check box
- Removed the Refresh from GIS feature

HF04

eTRAKiT search filters

The Query Filter feature, which enables you to exclude certain records from searches on your eTRAKiT public website, was enhanced to use drop-down lists instead of SQL syntax for setting up filters. This new method protects against potentially dangerous SQL commands. You can set up multiple filters based on status, record type, and record subtype.

Important: Existing filters are not converted. Before you upgrade, make a note of existing filters. After you upgrade, set up the filters following the new process.

The Query Filter feature is available for Permitting, Projects and Planning, Licensing, Entity Management, Parcel (Land Management), Code Compliance, and CRM.

Search

Query Filters

	Field Name	**Command**	**Value**
Delete	Status	IN	APPROVED
Delete	Type	NOT IN	TEST
Add Filter		IN	

To add filters, complete the following steps:

1. Select the filter criteria: **Status**, **Type**, or **SubType**.

   Note: **SubType** is not applicable in **Parcel** preferences.

2. Select a command: Select **IN** to define a rule to *include* records based on the criteria you selected. Select **NOT IN** to *exclude* records based on the criteria you selected.
3. Select the value. The values are defined in WUM for each module.
4. Select **Add Filter**.
5. Repeat these steps to add additional filters.
6. Select **Save**.

To remove a filter, select **Delete** next to the filter you want to delete.

You cannot change a filter you added. Delete the filter you do not want and then add a new filter.

(PBI 522464)

HF03

Multiple business licenses

You can now add as many business license records as needed for a single Entity Management record. Previously you could add a maximum of two records. In addition, one license can now be designated as the primary license.

This feature required significant changes in the database, Community Development, Web Utilities & Maintenance (WUM), and eTRAKiT. (Feature 468211)

Database changes

This enhancement centers on a new database table called aec_licenses, which will now store all license information. The new table replaces the functionality of the BusLic1 and BusLic2 fields in aec_main that were previously used to store business license data.

During the upgrade to this release, data is moved from the BusLic1 and BusLic2 fields in aec_main to the new table. Note that *this is a move, not a copy function*.

Additional database changes were made:

- Updated entries in the prmry_audittrail table for the old BusLic1 and BusLic2 fields to point to the migrated entries in aec_licenses
- Added an entry to the prmry_t9_admin_managepanels table for the new **License Types** pane in Entity Management
- Updated the entry in the prmry_t9_admin_managepanels table for the changed **License Information** pane in Entity Management
- Removed preferences from the prmry_preferences table for the old BusLic1 and BusLic2 fields that are no longer used
- Removed preferences from the etrakit3_preferences table for the old BusLic1 and BusLic2 fields that are no longer used
- Cleared values in the BusLic1 and BusLic2 fields in the etrakit_cart_activities table

Community Development

Community Development changes include:

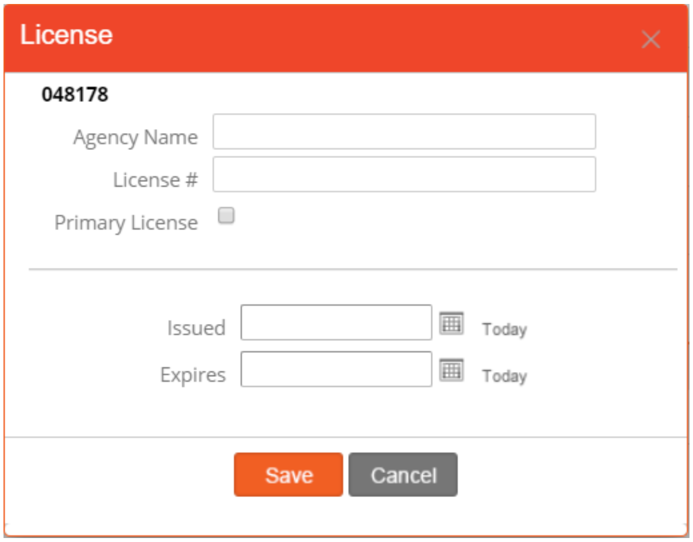
- License Information pane
- Contacts linked to an Entity Management record
- Advanced Search

License Information pane

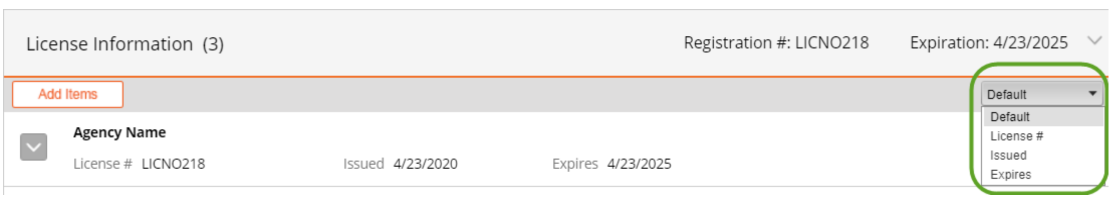
In Entity Management, license type data was moved out of the **License Information** pane into a new pane called **License Types**. All the same information is still available, but separated into two panes.

Also, the **License Information** pane was modified to include the following new features:

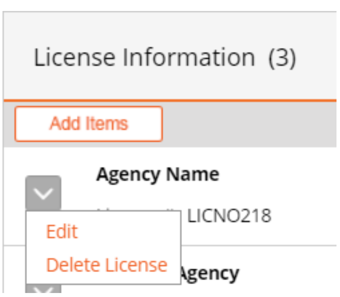
- **Add Items** button: Select this button to add a license to the record. Complete the fields and then select **Save**.



- Sort: You can sort the license list by license number, issued date, or expires date. By default, the primary license is listed first, followed by additional licenses.



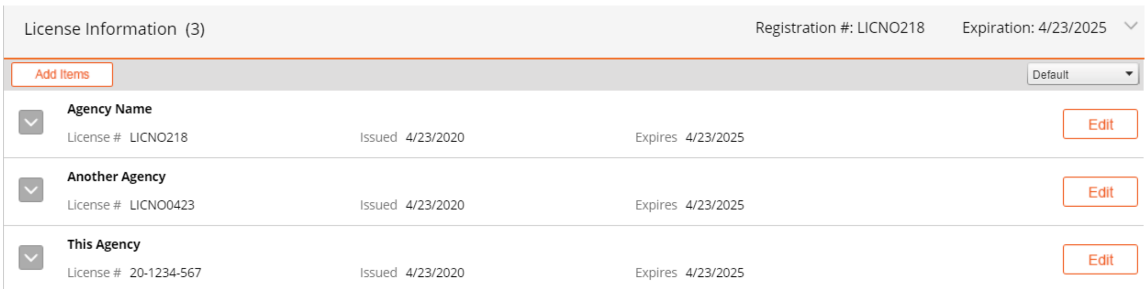
- Functions menu: From this menu, you can choose to edit or delete licenses.



The **License Information** pane still includes the following license details and actions for each license on the record:

- In the pane header, **Registration #** and **Expiration**: Previously these fields showed the registration number and expiration date from the BusLic1 fields. Now these fields show the registration number and expiration date from the primary license.
- Agency name (previously **Agency 1** or **Agency 2**): Agency that issued the license. This field is not labeled.

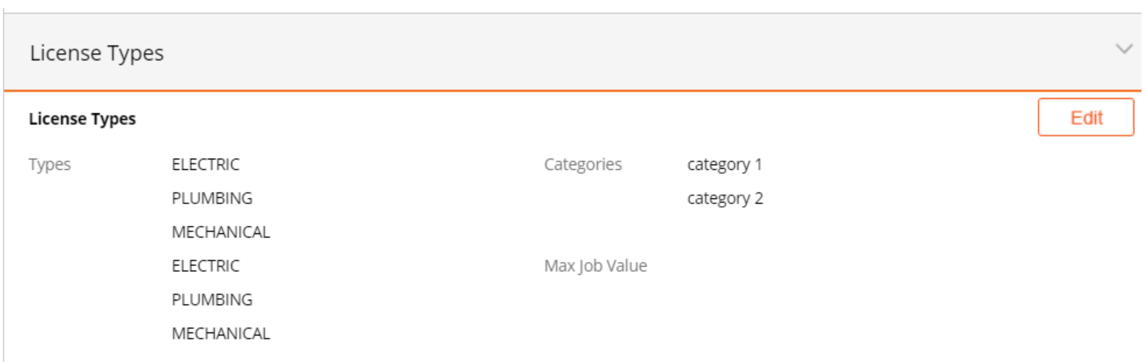
- **License #**: License number assigned by the licensing agency.
- **Issued**: Date the license was issued.
- **Expires**: Date the license expires.
- **Edit** button: Select this button to edit the license details.



The new **License Types** pane includes the following fields that were previously in the **License Information** pane:

- **Types**: If you require a contractor to have a specific license type when applying for certain permits online, that license type must be selected here. You can select up to six license types for an Entity Management record.

  License types, as well as the types required for online permit applications, are defined in WUM
- **Categories**: Two freeform text fields. Typically these fields are not used unless your agency has defined a use for them.
- **Max Job Value**: If you want to set a maximum job value for this Entity Management record, select a value in this field. The values are defined in WUM. When the entity applies for a permit or project online, the job value cannot exceed the value in the **Max Job Value** field.



Contacts linked to an Entity Management record

For contacts linked to an Entity Management record, the following features are now available:

- The business license fields for contacts linked to Entity Management records now reflect the new license fields.
- If you add an existing entity from Entity Management as a contact for an activity record (for example, a project or permit), the primary license number is used in the new contact record. If the Entity Management record does not have a license designated as primary, then no license number is added to the new contact record.
- If you change the business license number field for a contact linked to an Entity Management record, and then choose to update the Entity Management record with the contact's information:
  - If the license you entered already exists on the Entity Management record, the license number you entered is designated as the primary license.
  - If the license does not exist on the Entity Management record, a message appears indicating the license is not on the Entity Management record. Select the link in the message to go to the Entity Management record and add the license. Select **OK** to close the message.

Also, the functionality for updating license dates directly from the add or edit contact process is enhanced. When you hover over the alert icon ⚠, the pop-up window now includes a scroll bar for easier viewing of multiple messages. When you select ⚠, you can now pick from date fields for the expiration dates.

Advanced Search

Because license data is being moved from aec_main to aec_licenses, the aec_main fields in the following list are now blank and should not be used in Advanced Search. If you include these fields in your search, the field value in search results will be blank.

- BUS_LIC_1_AGENCY
- BUS_LIC_1_EXPIRE
- BUS_LIC_1_ISSUE
- BUS_LIC_1_NO
- BUS_LIC_2_AGENCY
- BUS_LIC_2_EXPIRE
- BUS_LIC_2_ISSUE
- BUS_LIC_2_NO
- LIC_CATEGORY_1
- LIC_CATEGORY_2
- LIC_GRADE_1
- LIC_GRADE_2
- LIC_GRADE_3
- LIC_GRADE_4
- LIC_GRADE_5
- LIC_GRADE_6

WUM

In WUM **Module Configuration** > **AEC**, the following changes were made:

- In **Preferences** > **Contractor Options**, removed the **Change Label for Business License** option. This label is no longer applicable.
- In **Fees** > **AEC Fees Options**, renamed the **Prompt for setting the Business License 1 Expiration to specific date** option to **Prompt for setting the Primary Business License Expiration to specific date**.

eTRAKiT Administrator

In **Entity Management** preferences, on the **General** tab, **Display** pane, the option for **License Types** was added to the **Anonymous**, **Public Registered**, and **Contractors** fields.

Also, the following fields were removed from **Entity Management** preferences:

- On the **Application** tab, **Display** pane:
  - **License Agency1 Fields**
  - **License Agency2 Fields**
  - **Required License Agency1**
  - **Required License Agency2**
- On the **Renewal** tab, **Custom** pane:
  - **License Agency1 Info Fields**
  - **License Agency2 Info Fields**
  - **Require License Agency1 Info Fields**
  - **Require License Agency2 Info Fields**

eTRAKiT public websites

When users search for a contractor and select a contractor in the search results, the **Licenses** tab now shows details for all of the contractor's licenses in a table-style format.

Also, the old business license fields were removed from the application process.

HF02

Contacts enhancements

The following changes were made related to contacts:

- Added the Search field to the **Add Contacts** dialog box.
- Modified the Confirm Contact dialog box that appears when you synchronize an individual contact from the Workspace **Entity Migrations** pane.

(PBI 461859)

New search features when adding contacts

When you add a contact from the **Contacts** pane **Add Contacts** button, you can now find existing contacts using the new **Search** field.

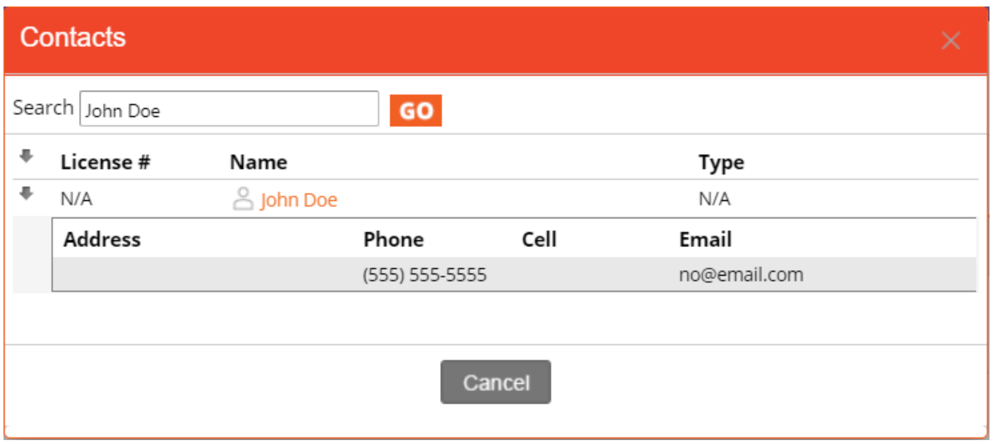
To use the new **Search** field to find a contact, enter the full Entity Management record number or part or all of the contact's name in the **Search** field and then select **Go**. Then, select the contact from the list.

> **Note:** Before you can use the **Search** field, you must select a type in the **Contact Type** field.

When you search for a contact using the **Search** field, the results list includes the following features:

- Arrow in each contact row: Select the arrow in a row to see more or less detail about the contact. Select the arrow in the header to see more or less detail about all contacts on the page.
- **License #** column: Shows the Entity Management record number for an Entity Management record or **N/A** for a standalone contact.

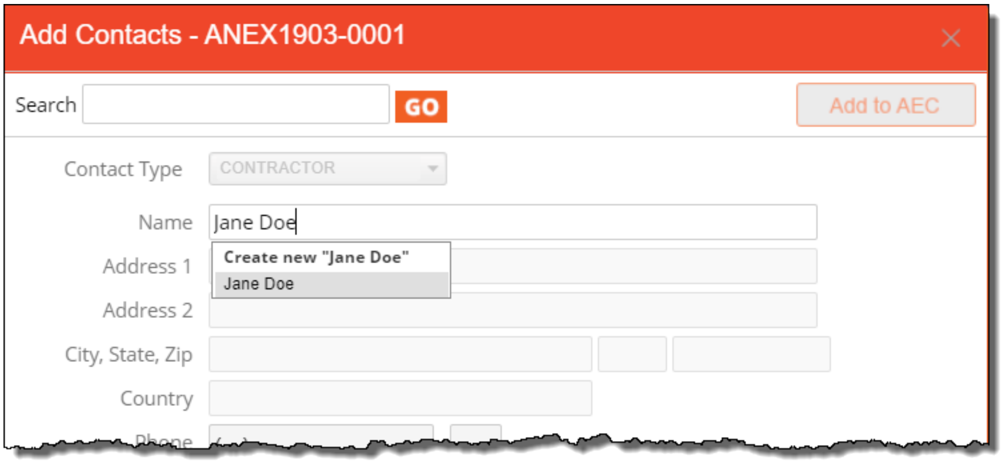
- Icon next to the contact name: Indicates whether the contact is an Entity Management record or a standalone contact .
- **Type** column: Shows the contact type from the Entity Management record (for example, architect, electrical engineer, or contractor), or **N/A** for a standalone contact.
- Multiple ways to select a contact: Select the license number link, icon, or name link to select the contact.
- Page navigation options: Use these options to move through long lists of results.
- **Cancel** button: Select **Cancel** to return to the **Add Contacts** dialog box.



The same new search features apply when you:

- Edit a blank contact (a contact that Community Development added automatically when you added the activity record)
- Add multiple records through Land Management

You can still use the existing **Name** field to find a contact. To use the **Name** field to find a contact, enter part or all of the contact's name in the **Name** field. A drop-down list shows existing contacts that match the text you entered. Select the contact you want to use. If the contact does not exist, select **Create new**.



If the name you select matches multiple contacts, the results list appears. Refer to the results list description for more details about the search results list.

> **Note:** You can also search by Entity Management record number in the **Name** field. You must enter the entire record number if you use this method—partial matches will not be found. After you select a contact, the **Name** field always shows the contact name, not the record number.

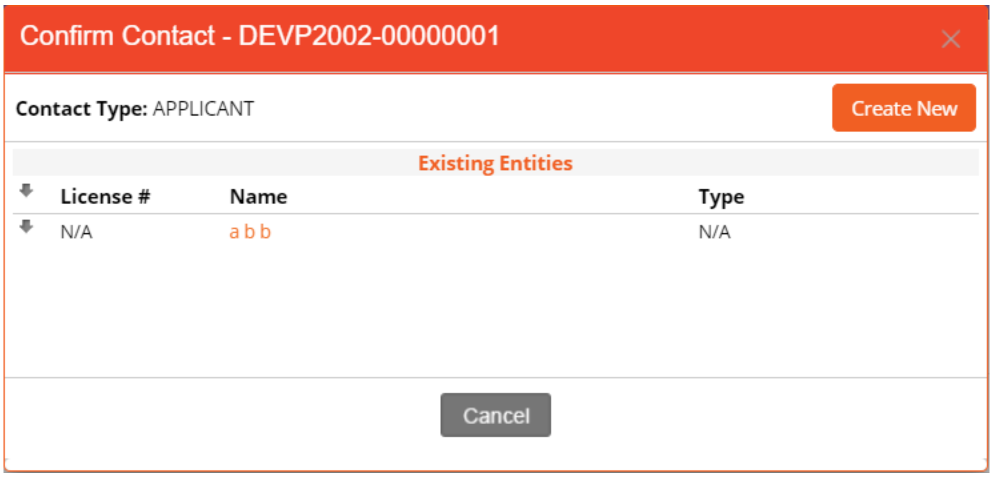
Confirm Contact feature when synchronizing individual contacts

When you synchronize an individual contact from the Workspace **Entity Migrations** pane, the **Confirm Contact** dialog box appears. This dialog box now includes the following features:

- **Create New** button: Select this button if none of the contacts listed match the contact you are synchronizing.
- Arrow in each contact row: Select the arrow to see more or less detail about the contact.
- **License #** column: Shows the Entity Management record number for an Entity Management record or **N/A** for a standalone contact.
- **Type** column: Shows the contact type from the Entity Management record (for example, architect, electrical engineer, or contractor), or **N/A** for a standalone contact.
- Multiple ways to select a contact: Select the license number link or name link to select the contact.

> **Important:** Community Development synchronizes the contact as soon as you select the license number or name link, and the synchronization cannot be undone. Be sure you choose the correct contact before you select the link.

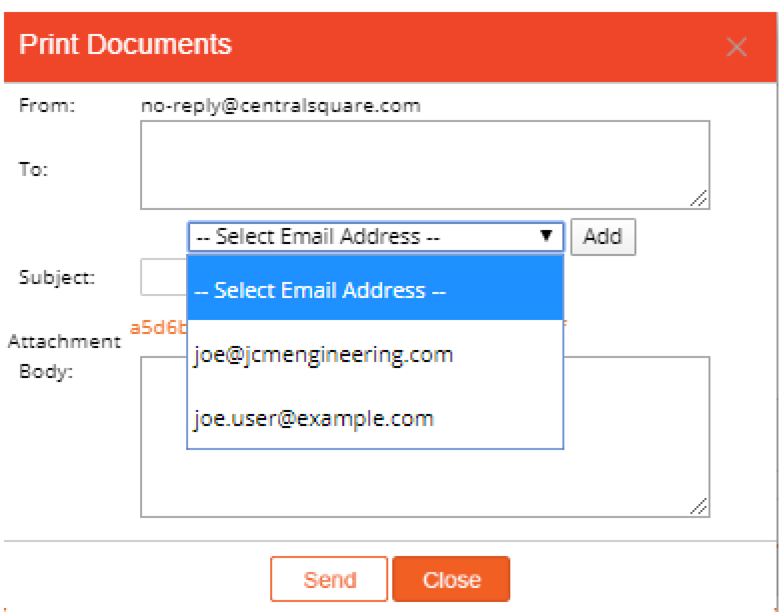
- **Cancel** button: Select **Cancel** to close the dialog box without synchronizing the contact and return to Workspace.



HF01

Email recipients enhancement

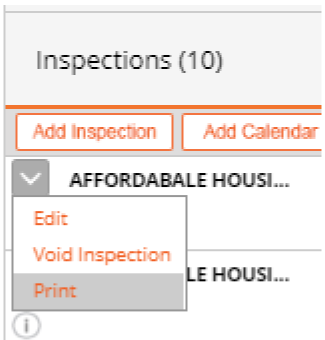
When you use the **Print** function in the **Inspections**, **Reviews**, or **Chronology** pane and choose an output type of **Email**, you can now choose recipients from a list. The list includes contacts with email addresses on the record.



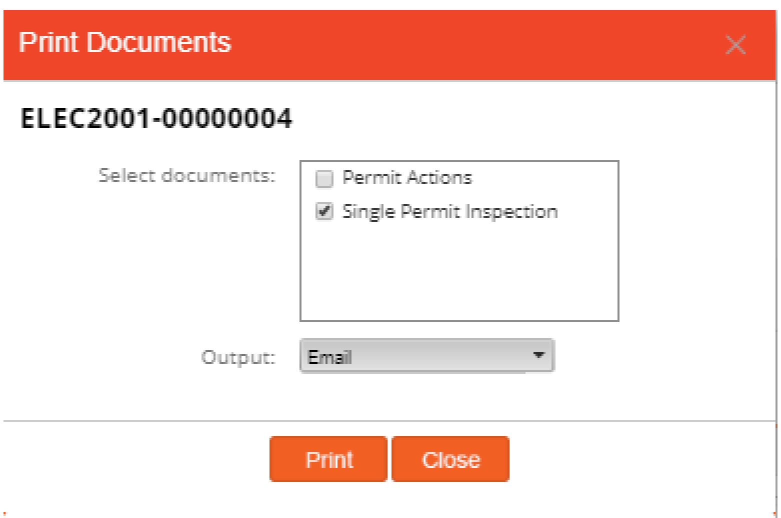
You can still enter email addresses manually to send the email to someone other than a contact on the record or to a contact that does not have an email address saved to the record.

To use the recipients list, complete the following steps:

1. Go to the activity record you want to work with.
2. Find the contacts you want to send email to and verify that their email addresses are saved to their contact records.
3. Find the inspection, review, or chronology item you want to email.
4. From the functions menu, select **Print**.



5. Select the document you want to print. Select only one document.
6. In the **Output** field, select **Email**.



7. Select **Print**.
8. In the unlabeled drop-down list, select an email address for the first recipient.
9. Select **Add**.
10. If you are sending the email to multiple recipients, select another email address from the list and then select **Add**. Repeat for each recipient.

You can also type email addresses in the **To** field. Separate email addresses with a semicolon (;).

11. In the **Subject** field, enter a subject for the email.
12. In the **Body** field, enter a message for the recipients.
13. Select **Send**.

(Case 01210990, SR 352024)

Resolved items

Community Development

HF18

- Resolved an issue that prevented trust account funds from being added properly when the **Receipt #** field contained more than 10 characters. (Case 01854645, Case 01861008, SR 923627)
- Resolved an error that occurred when any fee on the record used a formula that included the at sign (@). (Case 01847351, SR 917517)
- Resolved an issue that prevented users from accessing some permit types when the user's assigned department in WUM was blank. Users with no assigned department now have access to all permit types. (Case 01778399, SR 806077)
- In Community Development and eTRAKiT, modified the search feature to find results matching parts of a phrase you enter. (Case 01819332, SR 885728) Previously, results had to match the exact phrase.

  For example, if you enter **123 Broad**, results now include **123 N Broad** and **123 S Broadmoor**.
- Modified the Paymentus payment service to handle large reference number values from Paymentus. (Case 01806844, SR 900168)
- Resolved an authentication error that occurred if a user selected **Favorites** > **ALP** when your agency used Active Directory with or without Single Sign-On (SSO). (Case 01607662, Case 01767793, SR 747867)
- Resolved an error in Land Management that occurred when you added a land record and then tried to add a permit or project. (Case 01850561, SR 916371)
- Corrected spatial rules processing to function properly with password-protected map services. (PBI 883406)

Service pack 19.3.17.4

- For agencies who use Cardknox, made the following changes:
  - For eTRAKiT transactions only, added **ECHECK** as the payment method for ACH transactions. **ECHECK** appears in Community Development in the **Financial Information** pane and other places where the payment method is displayed.
  - Added the activity type (such as **CASE** or **PROJECT**) to the information passed from Community Development to Cardknox. This enables you to sort and filter transactions in Cardknox by Community Development module.

    If you use Cardknox for over-the-counter (OTC) transactions, you must install the updated DLL (dynamic link library) file. Contact the support team for more information.

No action is needed for using Cardknox for eTRAKiT transactions. All updates are made during the hot fix installation.

(Case 01852089, SR 917806)

HF17

- Resolved an issue that occurred when a user without ADMIN privileges tried to open a record that includes bonds. (Case 01759901, Case 01768099, Case 01830385, Case 01837695, SR 747977)
- Corrected rounding calculations for fees. (Case 01752341, SR 802619)
- Made the following changes in Advanced License Processing (ALP):
  - Corrected ALP to process the records you select on all pages of results (in the record list that appears after you select **Submit** in the **Advanced License Processing** pane) instead of processing records only on the page you are viewing.
  - Corrected the record selection feature to save your selections even when you move through pages of results.

  (Case 01710259, SR 884415)
- Corrected the Workspace **My Tasks** pane to exclude conditions that have a blank **Date Required** field. (Case 01823495, Case 01829124, SR 886284)

HF15

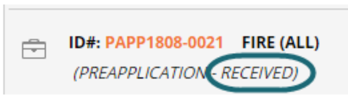
- Added a database script to the installer to recreate the foreign key constraints on main tables to fix any inconsistencies. (Case 01806836, SR 845486)
- Corrected the Refund feature to show the receipt automatically after you process a refund and save the refund receipt to the activity record. (Case 01753606, Case 01736764, Case 01772595, Case 01778060, SR 700200)

HF14

- Modified the add record process so that when you add a subpermit linked to an existing permit (for **Create New**, you select **Sub permit linked to this record**) and the link-to permit is linked to a project, the new subpermit is also linked to the project. (Case 00886194, SR 362833)
- Resolved an error that occurred when you tried to save a new search and you already had many saved searches (the combined names of your saved searches exceeded 2033 characters). Also resolved an issue that prevented some saved searches from showing in the search selection drop-down list. (Case 01734660, SR 657759)
- Corrected the Workspace **My Tasks** pane to exclude inspections and reviews for Code Compliance records that were deleted. (Case 01257041, SR 396627)
- Corrected the Add feature for attachments to replace the pound sign (#), percentage sign (%), and ampersand (&) in attachment file names with an underscore (_). (Case 01209183,

Case 01209507, Case 01325503, Case 01533890, Case 01566888, Case 01722698, SR 351236)

- Corrected **Add Standard Notes** for inspections and reviews to prevent duplicate notes from being added when you add a standard note (select **Add Standard Notes**, select note, select **OK**) and then add another standard note before closing the dialog box. (Case 01417058, SR 487199)
- In the Workspace **My Tasks** pane, corrected project reviews to show the project status after the project type. (Case 01417905, Case 01493673, SR 477458)



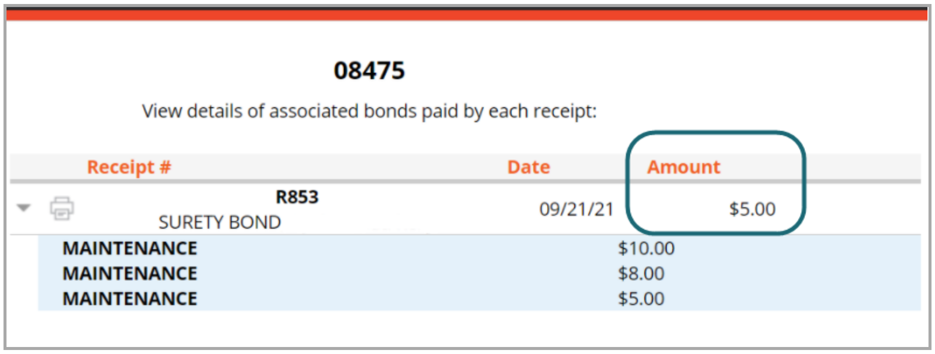
- Corrected the **Financial Information** pane **Fees** tab so that fee quantity and amount for subfees appear under the correct column headers. (Case 01525664, SR 529634)
- Corrected the Duplicate feature for permits to copy the approved, issued, finaled, and expired dates to the new permit even when the permit is linked to a land record and you clear the **Copy Site Info** check box. (Case 00859060, SR 658894)
- Corrected the Batch Scheduler feature to find the matching record when you enter an exact, existing record number in the **Search Term** field. (Case 01746192, Case 01740154, SR 660619)
- Corrected the **Refund Method** field to allow you to select an option other than the default, particularly when the first refund method in the drop-down list is **Trust Account**. (Case 01684104, SR 642430)
- Corrected the refund process to leave the PROFFERID field blank for refunded fees rather than copying the PROFFERID field value from the original fee to the refunded fee. (Case 01736504, SR 658856)

  Note: The PROFFERID field is stored in the database but is not visible in the user interface (UI).
- Resolved a display issue in the **Add Inspections** dialog box. Now, long inspection names appear next to their corresponding check box instead of on the next line. (Case 01660377, SR 603743)
- Corrected the **Internet Links** pop-up window so that the window moves with the page when you scroll on the activity record page and is closed when you select outside the pop-up window. (Case 01561862, SR 565462)
- Corrected the **Follow** pane to clear a record from the list when you select to stop following a record. (Case 01746624, SR 748927)
- Corrected reviews that are added automatically by Spatial Advisor when a permit is created to leave the review scheduled date blank if **Dflt Due Date** in WUM (**Module Configuration** > **Permitting** > **Reviews** > **Review List**) is blank or **0** for the review type. (Case 01698922,

SR 748675)

HF13

- For bonds, corrected the **View Receipts** dialog box to show the reduced bond amount as the current bond amount for bonds that were paid and then reduced using the same payment information. (Case 01545117, SR 569731) Previously, the current bond amount incorrectly showed the total of the original amount plus the reduced amount.



- Corrected the Duplicate feature to copy valuation data only if you select the **Copy Valuations** check box. (Case 01284695, Case 01739932, SR 415012)
- In Permitting, corrected the main information pane **Applicant** field to show the name of the **APPLICANT** contact from the **Contacts** pane when the **APPLICANT** contact type is added automatically based on permit type settings in WUM and then you add applicant details in the permit **Contacts** pane. (Case 01543390, Case 01547193, Case 01579909, Case 01581801, Case 01582723, Case 01685374, Case 01693985, SR 624125)
- Corrected payments to allow a payment date in the past (backdated payment). (Case 01743617, SR 697252)

HF12.1

- Resolved the following issues for USAePay payments:
  - Corrected an issue that caused the redirect to fail.
  - Corrected the **Check Status** function.
  - Returned the receipt number to the invoice field in the USAePay terminal. (Note that transactionId is still USAePay’s OrderId field.)

  (Case 01731540, SR 661439)

HF12

- Corrected the Duplicate feature for permits to include a contact's license number on the new record if the contact has a license number on the original record. (Case 01539036, SR 539153)

- Corrected the **Chronology** pane so that if you select **Edit** for an action in an event and then select **Save** without making any changes, it is not considered a change and therefore notes indicating the date changed are not added to subsequent events in the series. (Case 01551879, SR 545963)
- In the **Attachments** dialog box, corrected the display of the functions menu (which appears when you select) so that the entire menu is visible regardless of where the selected attachment is positioned in the dialog box. (Case 01559113, SR 549725)
- Resolved an issue in the **Options** dialog box that prevented the **About** tab containing the **System Details** page from showing when you use Active Directory. (Case 01570722, SR 555013)
- Corrected the Calendar feature to save changes properly when you change the **Subject** field. (Case 01682127, SR 616882)
- Corrected the **Add** button in the **Add Record** dialog box to be unavailable after you select it. This prevents you from selecting the button multiple times, which added multiple records. (ENG-51005, SR 426473)
- In Workspace, modified the Export feature in the following panes so that records in the export file are sorted according to the pane sort order.
    - **My Tasks**
    - **Reviews**
    - **Inspections**
    - **Action Center**
    - **Conditions**
    - **Issues**

  (Case 01391242, SR 456053)
- In Advanced License Processing (ALP), corrected the record selection feature (in the record list that appears after you select **Submit** in the **Advanced License Processing** pane) to save your selections even when you move through pages of results. (Case 00863950, SR 357924)
- Corrected a scrolling issue in the **Review Workflow** dialog box. (Case 01605963, SR 576116)
- Corrected the Entity Management module to update the etrakit_user_accounts table when you update an entity record in Community Development. This ensures that contractor information is updated in the contractors list in eTRAKiT Administrator (accessed from **General** preferences > **Contractor Login** tab > **Users** field **View List** link). (Case 01387346, SR 459182)
- Modified the **Fee History** window to be available to users with observer access. Users with observer access can also use the **Export** button in the **Fee History** window. (Case 01254166, SR 374034)

- Corrected Code Compliance to release the lock on a Land Management record (parcel lock) when the Code Compliance record is closed. Parcel locks are set automatically based on your WUM settings and the status of the attached activity record. (Case 01508442, SR 518574)
- Modified the login page to hide the **Forgot Password?** link for agencies that use Active Directory. (Case 01234023, Case 01426745, SR 361665)
- Resolved issues that occurred in the **Fee History** window when you paid a fee with subfees:
  - The fee showed multiple times in history
  - The first subfee showed in history but other subfees did not

  (Case 01537694, SR 537877)
- Corrected fee credits so that the fee code of the original fee is assigned and saved to the credit. (Case 01405667, SR 477074)
- Corrected Code Compliance to allow you to add attachments to closed cases if you selected both the **Lock Case Record after CLOSED** and **Exclude Attachments** check boxes. These check boxes are in WUM **Module Configuration** > **Code Compliance** > **Preferences** > **Triggers**. (Case 01386814, SR 452416)
- Corrected the **Internet Links** pop-up window so that the window moves with the page when you scroll on the activity record page and is closed when you select outside the pop-up window. (Case 01561862, SR 565462)
- Modified Community Development so that user-defined fields (UDFs) you add in WUM are available in Advanced Search in your current session. You no longer have to log out of Community Development and log in again to see the new fields. (Case 01363435, Case 01421013, Case 01642658, SR 526106)
- In Workspace, corrected the **My Tasks** pane to show all tasks, regardless of your device's display resolution and browser's zoom setting. (Case 01622421, Case 01636056, Case 01668864, Case 01681379, SR 608468)
- Corrected the Calendar feature to save changes properly when you change reserved time to end on a different date than the start date. (Case 01401622, SR 460983)
- Removed the Add Map Service button from the GIS **TOC** window (accessed by selecting the GIS Table of Contents tool). If you need additional map layers, contact your agency's GIS specialist. (PBI 644337)

HF11

- Resolved an error that occurred when you tried to edit an inspection that was added in IVR (Interactive Voice Response) with the **Time** field not in DateTime format (for example, **Time** field set to **ANY**). (Case 01545985, SR 552765)
- Corrected the order of names in the **Reviewer** drop-down list to match the order defined in WUM. (Case 01339602, Case 01668147, SR 434597)

- Modified the Auto Email by Status feature to send emails when a record is added with an auto email status. Previously, automatic emails were sent only for existing records when the status changed. (Case 01405561, SR 581791)
- Modified the Auto Reviews feature so that auto reviews that have a required previous review are not added when you add a record. This ensures that prerequisites can be met. (Case 00878889, SR 334364)

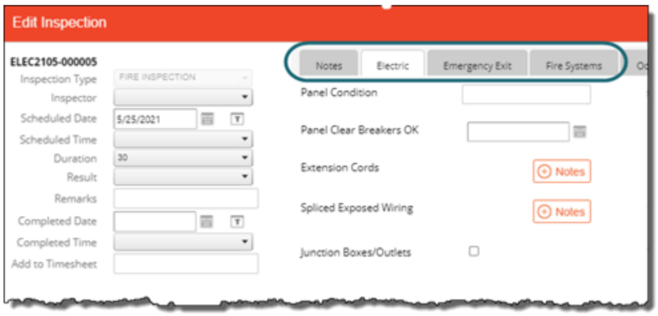
  When you upgrade to HF11, check the auto reviews you set up for each permit, project, and license type in WUM. Any auto reviews that have prerequisite reviews will not be added to new records. You must manually add the reviews that have prerequisites as well as the prerequisite reviews to records you add in Community Development after you upgrade to HF11.
- Modified the Batch Scheduler feature to use the time increments set in WUM (**Inspection Time Increments** options) in the Batch Scheduler **Time** field. (Case 00855380, SR 313771)
- Corrected the **Location Details** map in the **Create Issue** dialog box so that the map is displayed properly. (Case 01671763, SR 609532)
- In Advanced Search, expanded the number of items Community Development can process when you use the **in** filter and select multiple items in the drop-down list. (Case 01374064, SR 464403)
- Modified Code Compliance to update **Last Action** and **Follow up** date fields when an inspection is automatically added based on the result of a previous inspection. The dates are updated only if the **Set Follow-Up Date to Most Recent Inspection Scheduled** check box is selected in WUM **Module Configuration** > **Code Compliance** > **Inspections** > **Preferences** > **Preferences**. (Case 01685860, SR 618447)
- Corrected the order of prefixes in the **Add Record** dialog box, **Prefix** drop-down list, to match the order defined in WUM when the record type does not have a prefix defined. (Case 01255276, SR 398340)
- Modified the **New Permit Linked To Land Management** function to copy contacts from the associated Land Management record to the new permit. (Case 01574616, SR 624117)

  The **New Permit Linked To Land Management** function is available only when you add a permit from an existing permit that is linked to a Land Management record, and only if the **Require linking to a Land Management record** check box is selected in WUM **Module Configuration** > **Land Management** > **Site Info**.

HF10

- Corrected the add review and edit review processes to fill the **Received By** field when you enter a date in the **Date Sent** field. (Case 00886423, SR 344377)
- For bond payments, removed the hard-coded payment methods of **Check** and **Credit** so that only the payment methods defined in WUM (in **System Settings** > **Accounting** > **Bonds**) are available when you process a bond payment. (Case 01368218, SR 363933)

- In the **Edit Inspection** window, modified the **Notes** and custom screen tabs so that the tab you are viewing is highlighted. (Case 00892505, SR 347718)



- Modified the default sort order in the **Inspections** pane to be based on scheduled date and completed date, with blank dates at the end of the list. (Case 00341022, SR 323845)
- For fees, corrected the Edit feature to properly accept and reflect the new fee amount you enter. (Case 01400904, SR 496054)
- Resolved an issue that prevented you from opening a Land Management record from an inactive tab when the record number included a special character. (Case 01470252, SR 499559)
- Removed an unnecessary Telerik library reference. This change prevents an error from appearing in the Chrome DevTools **Console** tab when you view the GIS module in Community Development. (Case 01518562, SR 552954)
- Corrected Advanced License Processing (ALP) so that when ALP is configured to add an inspection to a record and inspections are geo-based, the default geo-based inspector is assigned to the inspection. (Case 01468117, Case 01655364, SR 525915)
- Corrected automatic status updates so that when a record has two reviews with the same name, the record status is set to **Approved** when the status of one of the reviews is set to the status defined in WUM **Module Configuration** > **Reviews** > **Preferences**. (Case 01253684, Case 01608110, Case 01616065, Case 01616969, SR 590619)
- Corrected the Edit feature for conditions so that changes you make save properly when filtering is enabled in the **Conditions** pane. (Case 01688666, SR 623609)

HF09

- Corrected an issue that prevented the reviewer's name from saving when you added a review with a sent date in the past. (Case 01372069, SR 445086)
- Changed the default map image export type from jpg to png32 to resolve a white background issue. (Case 01612314, SR 580139)
- In the **Trust Accounts** pane, corrected the **Date** sort feature. (ENG-63710, SR 550333)

- Restricted input in the payment **Reference #** field so that you cannot enter more than 60 characters. This resolves an issue that occurred when you entered more characters than the database field could store. (Case 01227030, Case 01403645, Case 01514928, SR 357373)
- Restricted input in the account number field that appears when you add a fee that requires an account number. Now, you cannot enter more than 30 characters. This resolves an issue that occurred when you entered more characters than the database field could store. (Case 01593760, SR 580976)
- Resolved an error that appeared when you added or edited contacts. (Case 01542946, Case 01564029, Case 01584164, Case 01652229, Case 01656989, SR 547490)
- Resolved an error related to copying contacts that appeared when you created permits or projects with subrecords from a Land Management record. (Case 01559910, Case 01598128, SR 562140)
- In Land Management, corrected the Add Record function so that contacts on the land record are properly copied to the new record. (Case 01593083, SR 580198)

HF08

- Corrected the **Global Search** dialog box to show the status value for Land Management records instead of a blank in the **Status** column. (Case 01379515, Case 01414313, Case 01474439, Case 01520441, Case 01531730, SR 449459)
- Added a vertical scroll bar to the **Restriction** window that appears when you select ⚠ in the Land Management main information pane for a record that has restrictions. (Case 01244968, SR 370730)
- In Code Compliance, corrected the **Add Record** function so that the **Opened** date field is set to the current date when you add a record using the **New linked case to this record** option. (Case 00886358, SR 340893)
- In Advanced License Processing (ALP), corrected the **Search Item** drop-down list to show only searches designated as **Visible** in Search Manager > **Shared Searches** tab > **ALP** group. (Case 01578500, SR 561315)
- Corrected the permit Duplicate feature so that the **Sent By** field for reviews is copied to the new record when you duplicate a permit and copy reviews, and the **Copy Review Dates on Permit Duplication** check box is selected in WUM (**Module Configuration** > **Permitting** > **Reviews** > **Preferences**). (Case 01410067, SR 464357)
- Resolved an issue that prevented you from changing the scheduled date of an existing inspection when you had to override the inspector’s cap on the new date. (Case 01571390, SR 555725)
- Resolved a payment issue that caused a “Reference # Required” message to appear when **Payment Method** was **Cash**, even though a reference number field is not required or available for cash payments. (Case 01611741, SR 580141)

- Resolved an issue that prevented SSRS documents for chronology items from being available to print from the **Chronology** pane. Now, when you add a document to a module's **Chronology** folder in SSRS manager, and then add that document in WUM (**System Settings** > **Interfaces** > **Forms & Reports** > **Add Report from SSRS**), the document is available for selection as expected in the **Print Documents** dialog box (accessed from the **Chronology** pane functions menu > **Print**). (Case 01491224, SR 516624)
- Modified Community Development to pull individual contractor data once daily from the Contractors State License Board (CSLB) and store the data in a file. When contractor details need to be verified, before calling the CSLB web service, Community Development checks the stored CSLB data file for the needed information. If the data is available and updated for the current day, Community Development does not call the CSLB web service and instead uses the data in the stored file. If the data is not available or not updated for the current day, Community Development calls the CSLB web service.

  This new process addresses issues related to CSLB's quota (limit) on the number of web service calls per day per agency, and it applies only if you use the StateLicensingBoard.vb script. (Case 01593725, SR 575153)
- Modified the map service to correctly allow spatial rules from password-protected map layers. (Case 01619047, SR 581368)

HF07

- Corrected the Shared Searches feature so that shared searches are available immediately to all users in the search group without requiring those users to reset their preferences. (ENG-63706, SR 550282)

HF06

- Resolved an issue that prevented the GIS Table of Contents (TOC) from loading when the map service is access-protected with a user name and password. (ENG-63138, SR 545645)
- Resolved an issue that caused Community Development to become unresponsive when IWA Authentication was used with Spatial Advisor. (Case 01530043, SR 547069)
- Modified the **View in eTRAKiT** and **Remove from eTRAKiT** functions for attachments so that they control whether attachments are available in both eTRAKiT and Citizen Engagement. (ENG-61076, SR 524428)

  By default, attachments are not available in eTRAKiT or Citizen Engagement. Select **View in eTRAKiT** to make an attachment available for citizens to view in eTRAKiT or Citizen Engagement. If the attachment is available in eTRAKiT and Citizen Engagement, select **Remove from eTRAKiT** to hide that attachment from citizens using eTRAKiT or Citizen Engagement.
- Corrected the **Edit** and **Add Another Review** functions in the Workspace **Reviews** pane so that the **Send Email** window appears after you change the reviewer or add a review with a reviewer.

This enables you to modify the email before it is sent. The **Send Email** window appears only if your agency enabled WUM preferences for sending automatic emails for changes to the reviewer in WUM **Module Configuration** > *module* > **Reviews** > **Preferences**. (Case 01291620, SR 404978)

- Resolved an issue that prevented you from completing payments with a custom payment method due to a “reference number required” error, even after you entered the reference number. (Case 01560345, SR 549498)

HF05

- Corrected CRM not to override your selection in the **Assigned To** field for new cases, even if a default assignment for the case type is defined in WUM. (Case 01226512, SR 373619)
- Corrected Permitting so that users with the OVERRIDE_FIN_EXP_LOCK privilege can modify permits that are locked by the finaled date or expiration date. (Case 01242194, Case 01428751, Case 01465815, SR 365748)
- Resolved an issue that sometimes prevented the map from appearing when you selected Map in Advanced Search results. (Case 01521518, SR 532132)
- Added M4A as an allowed file type for attachments. (Case 01460044, Case 01471438, SR 509670)
- Resolved an issue that prevented you from completing credit card payments due to a “reference number required” error even after you entered the reference number. (Case 01560345, SR 549498)

HF04

- Modified all modules so that you cannot change the record type or subtype for an existing record. (PBI 440279)
- Corrected CRM to assign the default inspector properly for records added through CRM Workflow. (ENG-58746, SR 495659)
- Resolved a technical error that prevented the map from loading in the Workspace **GIS** pane. (Case 01497542, SR 523831)
- Resolved an issue that prevented you from clearing the review due date when you add a review that has a default due date set in WUM. (Case 01420317, SR 469614)
- For My Building Permit (MBP), resolved an issue that prevented notes from being saved into the description field. If you use MBP, contact Support for help installing the new MBP build. (ENG-58816, SR 496437)
- Corrected single sign-on between a GIS server and maps in Community Development. (Case 01523190, SR 527650)

- Modified the Search by Tax Map# feature so that if you enter a partial Site APN to search for, exact and partial matches show in the search results. For example, if you enter **960**, records with Site APN of 960, 9601, and 96050 are shown. (PBI 505272)

HF03

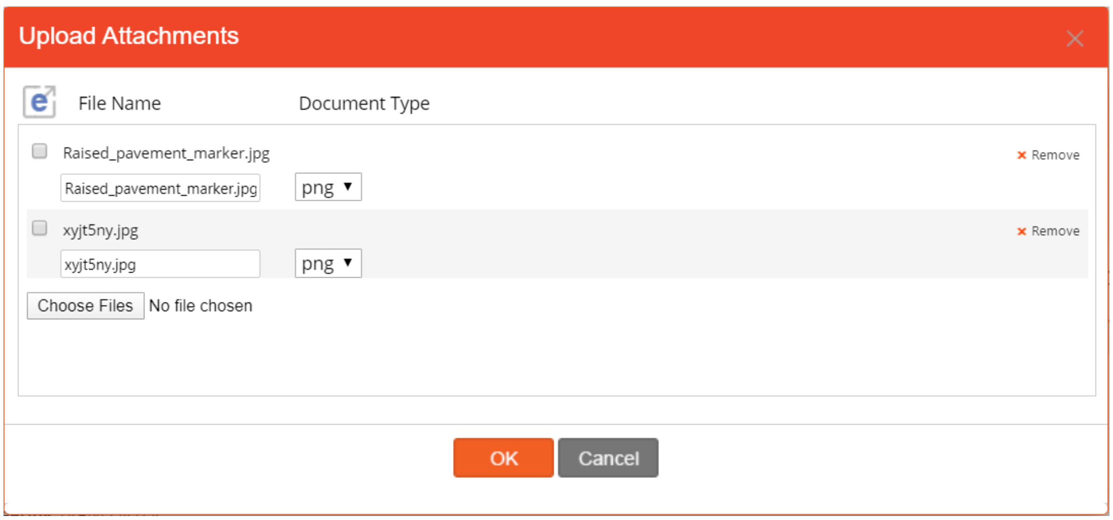
- Updated a third-party plug-in for web controls to eliminate a security concern associated with file uploads. (PBI 505978)
- Modified Spatial Advisor rules to accept any combination of uppercase and lowercase letters in the **LAYER2** (spatially joining) column. (Case 01410448, SR 474029)
- Implemented support for single sign-on between a GIS server and maps in Community Development. This means that users who are logged in to a GIS server on their workstation can see maps in Community Development. To use this feature, set <iwa>true</iwa> in the gisConfig.xml file, GISSettings section. (Case 00893423, SR 353102)
- In Land Management, corrected the Launch in GIS feature for records added from GIS with a shape type of point. Now, when you select **Launch in GIS** for these records, the map appears, centered on the associated point usershape on the map. (Case 01360470, SR 471593)
- Corrected inspection scheduling so users can request or schedule inspections only when inspections are allowed based on the agency calendar and the inspector's cap setup. (Case 01361934, Case 01409247, Case 01408563, Case 01394772, Case 01387848, Case 01386630, Case 01370688, Case 01359977, Case 01359600, Case 01358995, Case 01421644, Case 01433145, SR 440932)
- Added the StorePermitDetailsAsDescription preference in the MBP web.config file. If this preference is set to **TRUE** and the StoreWorkTypeAsPermitDescription is set to **FALSE**, the MBP permit details are saved in both of the following places in the database:
  - In the permit_main table, description column
  - In the prmry_notes table, notes column

  (Case 00491820, SR 322123)
- In CRM, corrected the following options in the **Print Documents** dialog box, **Output** field:
  - **Attach & Display**—the document is now attached to the record properly. (Case 01321775, SR 429119)
  - **Email**—the email dialog box now appears so you can send the email. (Case 01321765, SR 429115)
- In Code Compliance, modified the Duplicate feature so that violation notes are copied to the new case. (Case 00867119, SR 390600)
- Corrected the inspection cap override feature so that inspections are not added when the inspector's cap is reached and you choose not to override the cap. (Case 01385220, SR 451625)

- Corrected CRM to send emails automatically when you change the Status field to a value that is configured in WUM to mark the issue completed and send an email. (ENG-58346, SR 491682)
- On reviews, corrected the returned date validations to leave the field blank or keep the existing date when you enter a date in the past and the WUM Restrict Date Returned in Reviews to the current date or future date check box is selected. Also, modified the message that appears when this occurs. (Case 01313796, SR 447765)

HF02

- Added **Document Type** in the **Upload Attachments** dialog box so you can assign a document type for each attachment you upload during the upload process.



To use this feature, set the ALLOW_SELECT_ATTACHMENT_DOCTYPE in the prmry_preferences table to **YES**. This preference makes the **Document Type** field available in the **Upload Attachments** dialog box, as well as other features for managing and applying document types.

(Case 01419302, SR 469476)

- Modified the GIS print feature so that a yellow pushpin symbol marks the selected address when you print a map to PDF after plotting the address from the Advanced Search results listing. (Case 01284570, SR 400435)
- Removed the requirement to include <imageType> in the gisConfig.xml file when using Internet Explorer to display maps. (ENG-53513, SR 447602)
- Resolved a security issue related to encryption keys. (Case 01260339, Case 01291123, Case 01293902, SR 405021)
- Resolved an error in the **Cashiering** dialog box that occurred when the **Address** field exceeded 40 characters. (Case 01335142, SR 432587)

HF01

- Added **License Number** and **License Type** to the **Add Contacts** dialog box to make it easier to recognize the entity you want to select when multiple entity records have similar names and contact information. The **License Type** field appears only when **License Number** contains a value. (Case 01384202, SR 450768)
- Corrected the add existing contact process to retrieve business license information for existing Entity Management records. (Case 01383860, Case 01387352, SR 450772)
- Modified Community Development to allow special characters such as the ampersand (&) in permit number prefixes. (Case 00870203, SR 394781)
- Corrected the **Delete Record** function (available to admin users only) in Land Management. (Case 01258782, SR 411765)

  This function deletes the Land Management record only. Any related activity records such as permits, projects, code cases, or licenses remain in Community Development.
- Expanded the **Pay Method** field to 200 characters. (Case 01274969, SR 395527)
- Made the following changes in Permitting:
  - Corrected permit type preferences to properly override global permit preferences. (Global permit preferences are in WUM Module Configuration > Permitting > Reviews > Preferences.)
  - Resolved an issue that caused the permit status to be updated when only one review status was updated if there was a duplicate review on the permit record. This issue occurred if you selected the **Set Permit Status to 'Approved' when the status of all reviews are set to** check box in WUM.

  (Case 01291566, SR 429706)
- Modified the Common Entity synchronization feature so that contacts created by GTUR (land update routine) can be synchronized to Common Entity. (Case 01399957, SR 460097)

WUM

HF18

- Modified WUM to update the Proxy.Config file in WUM as well as in Community Development when you update the **GIS Configuration** page's **Proxy List** section. Also, modified WUM to add the Proxy.Config file for eTRAKiT GIS configuration when you update the **eTRAKiT GIS Configuration** page's **Proxy List** section and the Proxy.Config file is not found in the eTRAKiT server path. (Case 01760928, Case 01771989, SR 710118)
- Modified the Custom Screens feature to prevent you from adding pick list values that exceed the character limit of the database field. (Case 01760013, SR 800498)
- Corrected WUM to properly save to the database the payment URL you enter in the **System**

Settings > **Accounting** > **Cash Register** > **Payment URL** field for over-the-counter (OTC) payments. (Case 01701827, SR 697287)

HF16

- Corrected payment vendor configuration settings (**System Settings** > **Accounting** > **Cash Register** > **Payment Configuration** section) so that changes you make are saved when you select **Save**. Previously, the settings reverted to defaults even after you saved changes. (Case 01752847, SR 700007)

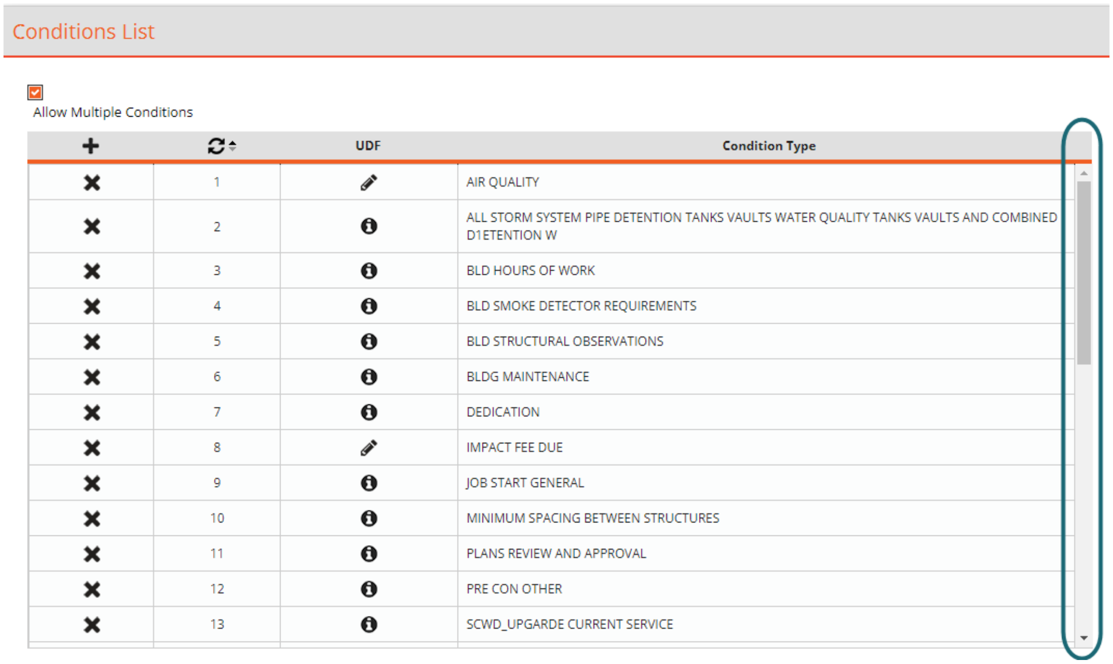
HF15

- Corrected Permitting inspection custom screens so that the name of new screens is saved properly with the name you assign instead of being saved with the same name as an existing screen. This fix also resolves the issue of both screens with the same name being deleted when you delete one of the screens. (Case 01750126, SR 804544)
- Resolved a display issue on the **System Settings** > **GIS Configurations** > **GIS Configurations** page, **GIS Settings** section. Previously, the fields appeared blank even if you had set the values. Now, the saved field values appear. (Case 01794149, SR 801469)
- Modified WUM to update the Proxy.Config file in WUM as well as in Community Development when you update the **GIS Configuration** page's **Proxy List** section. Also, modified WUM to add the Proxy.Config file for eTRAKiT GIS configuration when you update the **eTRAKiT GIS Configuration** page's **Proxy List** section and the Proxy.Config file is not found in the eTRAKiT server path. (Case 01760928, Case 01771989, SR 710118)
- Corrected inspection custom screens (UDF screens) to be saved properly when you add custom screens. (Case 01777743, SR 777980) The following issues no longer occur:
  - Twelve-field layouts are not truncated to ten fields after you save the screen.
  - Screens are not duplicated, and duplicate screens do not replace existing screens or new screens.

HF14

- Modified the scrolling feature in listings to allow you to drag an entry anywhere in the listing. (Case 01755307, SR 711295)

  Previously, the listing pane did not scroll as you dragged an entry toward the beginning of the list. So, when the listing included a scroll bar, you could only move an entry within the visible entries. A listing with a scroll bar is shown in the following example:



- Corrected the This Status Marks Issue as Completed feature to save your selections for a specific issue type to that issue type only rather than to all issue types. (Case 01401975, SR 461012)
- Restricted condition notes to a maximum of 2000 characters. This resolves an issue that prevented you from voiding a condition in Community Development if the condition had a note longer than 2000 characters. (Case 01364254, Case 01592828, SR 466701)
- Corrected automatic emails by status for reviews to send emails to contacts based on contact type from Community Development when the email template includes a contact type field such as **[contractor]** or **[owner]**. (Case 01719835, SR 645176)
- Corrected automatic emails by result for permit inspections to send emails to the contractor address from Community Development when the review status email template includes a send-to email address of **[contractor]**. (Case 01670721, Case 01711371, SR 652886)
- Corrected the Copy Definitions feature to copy **Fees (Allowable)** and **Fees (Automatic)** definitions only once. Previously, the fees definitions you selected were duplicated in the database. (Case 00893068, SR 368343)
- Corrected the Delete License feature to remove all data, such as inspections and reviews, related to the license you delete. (Case 01602630, SR 574773)
- Resolved an issue that caused duplicate tasks in **System Settings** > **Time Tracker** > **Rates/Accounts** when you tried to set all tasks for a user to the same rate (using the **Set All Rates** button) while any of the **Use "CHRONOLOGY ACTION" as Task Type**, **Use**

"INSPECTION" as Task Type, or **Use "REVIEW" as Task Type** options are selected on the **System Settings** > **Time Tracker** > **Default Tasks** page. (Case 01521394, SR 526986)

- Corrected the Edit Review feature not to require a status unless you select an automatic next review type. (Case 01742347, SR 662231)
- In the PRMRY_TIMETASKS database table, expanded the TASKNAME column from 30 characters to 60 characters. This resolves an issue that prevented tasks with names longer than 30 characters from being added to the Time Tracker **Rates/Accounts** page when you used any of the **Create Tasks for all Types** buttons on the Time Tracker **Default Tasks** page. (Case 01237261, SR 429150)
- Corrected WUM to properly save to the database the payment URL you enter in the **System Settings** > **Accounting** > **Cash Register** > **Payment URL** field for over-the-counter (OTC) payments. (Case 01701827, SR 697287)

HF13

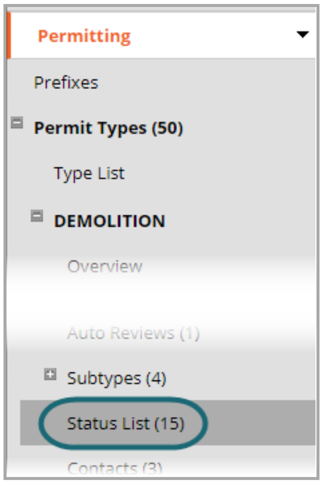
- Modified the CAN ADD FEE and CAN EDIT FEE privileges so that users are not required to have the CAN EDIT privilege to be able to add and edit fees. (Case 01553179, SR 583813)
- Corrected an issue that occurred when you tried to access the **Add Geo Types** dialog box. (Case 01710184, Case 01714655, SR 696412)

  The **Add Geo Types** dialog box is accessed by going to **Module Configuration** > **Permitting** or **Projects and Planning** > **Types** > **Type List**, and then double-clicking in the **eTRAKiT GeoType** column. This feature is available only if the **eTRAKiT** check box is selected.
- In the **Custom Screens** dialog box, restored the missing delete function (×) for picklist field items. (Case 01748719, SR 697508) To access the **Custom Screens** dialog box, go to **Module Configuration** > *module* > **Types** > *type* > **Custom Screens**, and then select .

HF12

- Resolved an issue with capitalization in GIS data types. This issue prevented the **Single Select** tool from working properly in Community Development. (Case 01657206, SR 591430)
- Corrected the **Apply and Save Group Privileges** feature in **User Preferences** > **User Privileges** so that when you select a group, your selection is saved. (Case 01703041, SR 627557)

- Corrected the navigation pane in **Module Configuration** > **Permitting** > **Permit Types** > *type* so that if status values are assigned to the permit type, **Status List** appears as black text with the number of assigned status values next to it. Previously, **Status List** appeared in gray text with no number until you selected the page, even if status values were assigned.
(Case 01545705, SR 543627)



- Corrected the Edit fee schedule feature to update all modules with the new fee schedule name. Previously, the name was updated only in the module in which you changed it, which made fees from that fee schedule unavailable in other modules. (Case 01332061, SR 430302)
- Corrected the **Copy Notes to Another User** function to copy only notes from the inspector selected in **Standard Notes for** to the inspectors you choose in the **Inspection Standard Notes Copy To** dialog box. (Case 01717116, SR 642735)
- Corrected the **Assign Check List Items** page to allow you to add items to the **Master Checklist Item** listing. (Case 01724664, Case 01725600, SR 653087)
- Corrected the **Condition** window to show line breaks properly in the **Condition Notes** field instead of showing HTML code for the line breaks (/r/n). (Case 01596868, Case 01622013, SR 577675)
- Corrected the Set Permit Status to Approved when the Status of All Reviews Are Set feature so that review types designated as **Exclude** on the **Review List** page are not processed by this feature. (Case 01712147, SR 639692)

HF11

- Resolved an issue in Internet Explorer that prevented you from adding a chronology item on the **Chronology** page for a specific record type (for example, **Module Configuration** > **Permitting** > **Permit Types** > *type* > **Chronology**). (Case 01534510, SR 543971)
- Corrected the **Contacts** page to accurately update the user ID and date at the bottom of the page to indicate who last updated the page and when. (Case 01358573, SR 440113) The

Contacts page is available in Permitting, Projects and Planning, Code Compliance, and Licensing > **Types** > *record type* > **Contacts**.

- Added the ability to include review notes in emails sent automatically by Community Development. To include review notes in emails, open your email template and add [!REVIEW_NOTES] where you want the review notes to appear in the email. (Case 01455754, Case 01508839, SR 527284)
- Corrected the Licensing **Captions/Lists** page to allow you to enter up to 100 characters when you add an item for a drop-down list. (Case 01574854, SR 566827)

HF10

- Resolved an issue that prevented the **System Settings** > **Email** page from appearing when the encrypted password was missing from the Prmry_Preference table. (Case 01373667, Case 01450038, Case 01499455, SR 525398)

HF09

- Reordered columns on the **Spatial Advisor** page (**System Settings** > **Interfaces** > **Spatial Advisor**). (PBI 589550)
- Resolved an issue that prevented the **Spatial Advisor** page from loading when the map service was access-protected. (Case 01655678, SR 569361)
- Resolved an issue that prevented the **Add/Edit Valuations** window from appearing. (Case 01633919, Case 01642359, Case 01642367, Case 01642374, Case 01642372, Case 01642376, SR 592189)
- Made additional changes to correct an issue on the **Subtype List** page that prevented you from deleting subtypes for a specific record type. (ENG-63440, SR 547564)

HF08

- Resolved an issue that prevented the Spatial Advisor feature from opening (**System Settings** > **Interfaces** > **Spatial Advisor**). Also, resolved an issue that prevented the map service URL from being saved in the database. (ENG-66144, SR 574603)
- In **Module Configuration** > **AEC** > **Preferences**, changed the **Autogen Options** page name to **Preferences**. This page now includes other settings in addition to autogen options. (Bug 577810)
- Corrected an issue on the **Subtype List** page that prevented you from deleting subtypes for a specific record type. (ENG-63440, SR 547564)

  The **Subtype List** page is in **Module Configuration** > *module* > *record* **Types** > *type* > **Subtypes** in Permitting, Projects and Planning, Code Compliance, Licensing, CRM, and AEC (Entity Management).

Example: Module Configuration > **Permitting** > **Permit Types** > **Fence** > **Subtypes** > **Subtype List**.

HF06

- Modified the Global Internet Links feature to accept links containing a period (.) or hyphen (-). (Case 01500635, Case 00888352, SR 343545)

HF05

- Added the **Prevent eTRAKiT Payment** check box to the **Status List** page in WUM **Module Configuration** > **Projects and Planning** > **Types** > *project type*. Select this check box for a status to prevent payments in eTRAKiT for projects with this status. Previously this feature was available for permits only.

  If you choose to use this feature in WUM, you must select the **Skip in WUM** check box in the eTRAKiT Administrator **Projects and Planning** preferences > **Application** tab > **Payment** section.

  (Case 00486758, Case 01332122, SR 286618)
- Resolved an issue that occurred when users tried to log in using Active Directory after a WUM upgrade or restart of the application pool. (Case 01405290, Case 01453521, Case 01526863, Case 01547091, SR 462311)

HF04

- Restored the missing delete function (×) in **Module Configuration** > **CRM** > **Status List**. (ENG-52413, SR 439318)

HF03

- Resolved a login security issue related to Active Directory. (ENG-53898, SR 450188)

HF02

- Made the following changes on the WUM Module Configuration > Citizen Engagement > System > System Users page:
  - Modified the **Password** fields to appear masked.

  - Added the **Create User** button, which appears only if the Public User or Contractor user is not set up in User Preferences > User Names. When you select **Create User**, the **Add/Edit User** dialog box appears. Complete the fields and then select **Save**.

  (PBI 450278)

- For CRM subtype workflows, corrected the **Using Template File** field to save your selection. (Case 01360925, SR 441883)
- Made the following changes in Module Configuration > *module* > *type* > Auto Fees:
  - Fixed the **Auto Fees** listing so that subfee lists can be collapsed
  - Modified the auto fees count in the navigation pane to include standalone fees and parent fees but not subfees

  (Case 01379446, SR 448697)

HF01

- Added the **Use Anonymous Authentication** check box in System Settings > Email. Select this check box if you want to use anonymous authentication for emails that Community Development sends automatically. (PBI 448782)

eTRAKiT

HF18

- Modified eTRAKiT to retain the contractor's current status when contractors change their eTRAKiT password. (Case 01760257, Case 01773875, SR 843579)
- In the project application process, corrected the project description field so it is saved properly in the database. Previously, the description was saved to the wrong database field if eTRAKiT Administrator's **Uploaded Path** field contained a file path. (Case 01805423, SR 876307)
- In Community Development and eTRAKiT, modified the search feature to find results matching parts of a phrase you enter. (Case 01819332, SR 885728) Previously, results had to match the exact phrase.

  For example, if you enter **123 Broad**, results now include **123 N Broad** and **123 S Broadmoor**.
- Resolved an issue that caused permits to be automatically issued when fees were paid in full, regardless of WUM and eTRAKiT Administrator settings defining when to automatically issue the permit. (Case 01564313, Case 01567041, Case 01613707, SR 588108)

Service pack 19.3.17.1

- For agencies who use Cardknox, made the following changes:
  - For eTRAKiT transactions only, added **ECHECK** as the payment method for ACH transactions. **ECHECK** appears in Community Development in the **Financial Information** pane and other places where the payment method is displayed.
  - Added the activity type (such as **CASE** or **PROJECT**) to the information passed from Community Development to Cardknox. This enables you to sort and filter transactions in Cardknox by Community Development module.

If you use Cardknox for over-the-counter (OTC) transactions, you must install the updated DLL (dynamic link library) file. Contact the support team for more information.

No action is needed for using Cardknox for eTRAKiT transactions. All updates are made during the hot fix installation.

(Case 01852089, SR 917806)

HF17

- Corrected the Report Issue feature in CRM (Citizen Response Management) so that when a citizen submits multiple issues in the same session, each issue is saved properly and later submissions do not overwrite earlier submissions. (Case 01793711, SR 803824)
- Resolved an issue that caused duplicate licenses to be added when a user completed a license application, selected the **View License** button, and then selected the browser's back button. (Case 01795163, SR 805055)

HF16

- Added support for eCheck.Net payments in Authorize.Net. If you want to accept eCheck.Net payments, enable eChecks in your Authorize.Net account. (Case 01815419, SR 874981)

HF15

- Resolved an issue in Advanced License Processing (ALP) that prevented the license expiration date from being set after a successful license renewal. Also, resolved an error that occurred when an ALP fee calculation used fee lookup tables and the lookup table value was **0**. (Case 01793277, SR 802110)
- Removed the Bookmarks icon from the maps toolbar on eTRAKiT public websites. (Case 01763780, SR 712079)
- Resolved a security issue related to viewing and printing inspection details. (Case 01766288, SR 749311)
- Resolved an issue that prevented the map from being displayed properly when a citizen or contractor searches for a property. Also, made changes to ensure push pins appear when a citizen or contractor selects a search result. (Case 01763813, SR 712089)

Service pack 19.3.14.1

- On the permit application step 1 page, resolved an issue that caused the **Next Step** button to change to **Processing** and be disabled if Spatial Advisor is in use and the applicant enters an address but does not complete all required custom fields. (Case 01766712, SR 803904)

HF14

- Corrected the Attachments feature for Land Management records so that attachments you add are saved only to the geotype record you are working with. Previously, the attachment saved to all geotype records with the same site APN as the record you were working with. (Case 01318318, SR 436563)

- Corrected a display issue that caused the **Navigate** menu to overlap the **Transaction History** listing on the **Cart History** page. This issue occurred only in Google Chrome. (Case 01542435, SR 540737)
- Resolved a security issue related to viewing and printing inspection details. (Case 01766288, SR 749311)
- Resolved an issue that prevented permit data and related fees from being saved properly. (Case 01766730, SR 797463)
- Corrected the Search feature for eTRAKiT public websites to show matching results when citizens search using custom fields. (Case 01741864, SR 661583)

HF13

- Corrected inspection scheduling to prevent citizens from scheduling inspections for permits that are finaled or expired if the **Lock Permit after Finaled date or Expired date (Applies to Inspections & Reviews)** check box is selected in WUM at the module or permit-type level. (Case 00875350, SR 351571)
- For eTRAKiT public websites, corrected the **Review Response** dialog box to hide remarks when the **Review Remarks** field in eTRAKiT Administrator is **False**. (Case 01756386, SR 701731)

  Citizens access the **Review Response** dialog box from the Dashboard in the **My Submittals Awaiting Response** listing, **Respond** link. The **Review Remarks** field in eTRAKiT Administrator is in **Permitting** and **Projects and Planning**, on the **General** tab.
- Resolved an issue in the permit application process that sometimes prevented the subtype field from appearing in step 1 for permits that have subtypes. This prevented citizens from selecting a subtype, and prevented automatic fees tied to the subtype from being added to the application. (Case 01750557, SR 699560)

HF12

- Corrected inspections that are added through Spatial Advisor during the application process to leave the inspection scheduled date blank. Also corrected reviews that are added through Spatial Advisor during the application process to leave the review scheduled date blank. (Case 01686147, Case 01698922, SR 624255)
- Corrected the Auto Email by Status feature to check the AEC record status and send emails only when the new status is not blank. (Case 01702815, SR 627438)
- Corrected the License Search Format feature to save your selection properly instead of changing fields you select from the license main table to user-defined fields (UDFs). (Case 01696304, SR 628628)

- Resolved an access issue for certain pages in eTRAKiT Administrator. (Case 01621221, SR 581992)
- Resolved an access issue for AEC renewals on eTRAKiT public websites. (Case 01654345, SR 600755)
- Corrected the contractor application process to properly save attachments that you upload in step 3. (Case 01700551, SR 626456)
- Excluded voided reviews from the **Reviews** tab that appears when citizens view details for a project, permit, or license on your eTRAKiT public website. (Case 01619985, SR 581540)
- Corrected a display issue that occurred on eTRAKiT public websites when a citizen viewed a record and used the sort feature on any tab. (Case 01506342, SR 517579)
- In the application process's **Review and Submit** step, removed the address's block data from the **Location** pane. (ENG-57763, SR 484269)
- Resolved an issue that caused permits to be automatically issued when fees were paid in full, regardless of WUM and eTRAKiT Administrator settings defining when to automatically issue the permit. (Case 01564313, Case 01567041, Case 01613707, SR 588108)
- Corrected the eTRAKiT application process to include all fees on the new record even if the total of fees is $0.00. (ENG-68134, SR 590614)

HF11

- Corrected the order of subtypes in the step 1 drop-down list for permit and project applications to match the order of subtypes defined in WUM. (Case 01330574, SR 435412)
- Modified eTRAKiT to use the value defined in the PayMethod preference instead of always assigning **CREDIT** as the payment method for eTRAKiT payments. (PBI 625012)

HF10

- Resolved an error caused by use of a secured map service (map service protected with user name and password). Secured map services are now supported. (Case 01659731, Case 01633940, SR 603348)
- Modified the multistep verification process for new users. Now, the email sent to new users includes hardcoded body text, and the activation link in the email is automatically generated. (Case 01541310, SR 558498)

HF09

- Corrected payment transactions to work with Advanced License Processing (ALP) payments when a contractor renews a license in eTRAKiT. (PBI 601181)
- Added all available geotypes from the database for selection when a citizen applies for a license. Previously, only the hardcoded geotypes of **Address** and **Parcel** were available for selection. (Case 01677979, SR 614713)

- Resolved multiple issues with the payment information displayed in email receipts. (Case 01305910, SR 435372, Bug 606611, Bug 615241)
- In the license application, restricted entry in the **Licensee Name** field to 40 characters to match the length in the database. This prevents an error that occurred if the applicant entered a name longer than 40 characters. (Case 01624934, SR 583742)
- Resolved an error that occurred if you enabled inspection caps but did not apply caps to any inspectors. (Case 01253159, SR 420256)

HF08

- Added the **Forgot Username** section in **General** preferences > **Public Login** tab and **Contractor Login** tab. The **Forgot Username** section includes the following fields:
    - **Username Link**: Select **True** to display a **Forgot Username** link on your eTRAKiT public website. Users who forget their user name can select the link and complete verification fields to receive their user name via email. Select **False** if you do not want to use the Forgot Username feature.

      Note: If the **Username Link** field is **True** on either the **Public Login** tab or the **Contractor Login** tab, the **Forgot Username** link appears on your eTRAKiT public website.

      If both **Username Link** fields are **True**, after selecting the **Forgot Username** link, the user must choose whether the account is for a public registered user or a contractor.

      If both **Username Link** fields are **False**, the **Forgot Username** link does not appear on your eTRAKiT public website.
    - **Email Subject**: This field applies only if the **Username Link** field is **True**. Enter text for the subject of the email that is sent to users who select the **Forgot Username** link. If you leave this field blank, default subject text is used.
    - **Email Body**: This field applies only if the **Username Link** field is **True**. Enter text for the body of the email that is sent to users who select the **Forgot Username** link. If you leave this field blank, default body text is used.

  (PBI 588899)
- Made the following changes:
    - Corrected the Forgot Username feature so that reCAPTCHA verification is required if you use reCAPTCHA.
    - Enhanced the Forgot Username feature so that messages appear indicating that the requested user name was sent to the email address entered. If multiple accounts are associated with the email address, each account is listed in the email.

- Modified the **Site Key** and **Secret Key** fields to appear masked (characters appear as dots) for security reasons.

  (Case 01623848, SR 583324, PBI 585856, PBI 585858)

- Resolved an error that occurred when an inspector tried to enter an inspection result for an inspection scheduled through eTRAKiT with the **Time** field set to **Any**. Now, to prevent the error, if a citizen schedules an inspection through eTRAKiT and selects **Any** from the **Time** drop-down list, the value is saved as a blank. (Case 01311164, SR 439560)
- Increased the company name field to 60 characters to resolve an issue that occurred when an entity with a company name longer than 50 characters selected the **Forgot Password** link. (Case 01338599, Case 01455649, Case 01568052, Case 01605158, SR 433967)
- Corrected the permit application process for logged-in contractors so that in step 2, the contractor's state and ZIP Code are filled in without any issues from the contractor's Entity Management record address. This applies only if **Populate Contacts** is **True** in the eTRAKiT Administrator **Permitting** preferences > **Application** tab > **Display** section. (Case 01612727, SR 579103)

HF07

- Modified eTRAKiT so that the **Contractors** pane on your eTRAKiT public website is hidden if you did not enable any links to appear in that pane. (Case 01368258, SR 363937)
- Corrected the Entity Management **General**, **Application**, and **Renewal** tabs to show changes you save. Previously, although the changes were saved to the database, they were not reflected on the tabs. (Case 01561848, SR 550768)
- Added messages that appear if a contractor logs in to your eTRAKiT public website and does not meet validation requirements. The messages appear based on validation requirements and messages you set up in the **Types** field in eTRAKiT Administrator **General** preferences > **Contractor Login** tab > **Validation** section. (Case 01511882, SR 524516)

HF06

- Resolved an issue that prevented public users from resetting their passwords when you use reCAPTCHA. (Case 01530878, SR 537660)
- Resolved an issue that allowed users to pay fees in eTRAKiT when online payments were disabled (*module* > **General** tab > **Payment** section > **Online** field was **False**). (Case 01300886, Case 01394897, Case 01488140, SR 410679)
- Corrected the **Test Email** hyperlink in the **Permitting** preferences > **General** tab > **eNotify** section so that the link opens the correct URL. (Case 00870231, SR 324407, Case 01330007, Case 01539985, SR 496801)
- Modified eTRAKiT to show the login screen when a user's session times out while the user is viewing the dashboard. (Case 01483587, Case 01552082, SR 520749)

HF05

- Corrected eTRAKiT inspection scheduling to allow permit inspection requests on active (not expired) permits only. (Case 01342378, Case 00853389, SR 351572)
- Made additional changes so that eTRAKiT passes payment details properly to Community Development when a citizen pays fees in eTRAKiT for multiple permits. (Case 01275172, SR 460103)

HF04

- On the **Admin Home** page, removed the **System Users** tab, which allowed you to set user IDs for generic anonymous, public, and contractor users. Typically, these users and passwords are set up during installation. (PBI 522505)
- Corrected license renewals on public websites to show custom screens properly when **UDF Fields** is set to **True** on the eTRAKiT Administrator Licensing **Renewal** tab. (Case 01370510, Case 01416788, SR 444524)
- Corrected the AEC application process so that step 3 (review and submit) shows the custom (UDF) fields entered in step 1 (AEC information). (Case 01311249, SR 415634)
- Corrected the CRM search on eTRAKiT public websites to include only the details you select in eTRAKiT Administrator Admin Home preferences, **Modules/Features** tab, **CRM Search Format** options. (Case 01321690, SR 423052)
- Corrected Spatial Advisor so that eTRAKiT messages appear appropriately when citizens complete actions on your eTRAKiT public website. (ENG-60469, SR 517629)
- Corrected the Forgot User Name feature for public registered users so that the **Forgot your user name?** link takes users to the correct page for retrieving their user name. (Case 01242289, SR 366347)
- Made changes to significantly improve login time to eTRAKiT public websites. (Case 01512476, SR 524604)
- Resolved an issue that generated an incorrect hyperlink for projects created in eTRAKiT. Also, resolved an issue that prevented the site address from populating from the paid items history in eTRAKiT. (Case 01333750, SR 440882, PBI 536356, Case 01333747, SR 440839, PBI 532826)

HF03

- For enhanced security, removed the following password fields on the **Admin Home** page, **System Users** tab:
  - **Anonymous Password**
  - **Public Password**
  - **Contractor Password**

Passwords for these users are used for system processing, not to log in to Community Development or WUM. Typically, these passwords are set up during installation. To change the passwords for these users, contact the Community Development support team.

(PBI 498756)

- Corrected the permit application process to allow manual entry of an address. (Case 01358741, Case 01461169, SR 440277)
- Corrected the Skip Processing feature to require or skip payments correctly at application time according to your WUM and eTRAKiT settings for permit status and payments due with the permit application. (Case 01313501, Case 01327398, Case 01363880, Case 01393784, Case 01405561, Case 00868934, Case 01327398, SR 418889)
- In the permit application process, step 2, renamed the **License or ID** field to **License #**. Also modified the field to always show the contractor's license number in this field for logged-in contractors. (Case 01419992, SR 470558)
- Corrected fee calculation during the permit application process for fees based on user-defined fields (UDFs). (Case 01229458, Case 01337436, SR 444010)

HF02

- Corrected eTRAKiT to properly apply Spatial Advisor rules and related fees based on permit type and subtype for all permit applications when a user applies for multiple permits in a single eTRAKiT session. (Case 01407413, SR 464549)

HF01

- Modified eTRAKiT to prevent users from adding records when a Prevent Add rule in Spatial Advisor is set up for the record activity, type, or subtype. (Case 01230151, Case 01231489, Case 00503900, Case 01332325, Case 01301773, SR 363999)
- Corrected custom screens to save changes properly so the updates appear in Community Development. (Case 00493558, SR 345146)

Mobile Inspection and Mobile Code apps (iTRAKiT)

HF05

- Modified Mobile Code so that code cases you add are assigned to you regardless of WUM settings for automatically assigning code officers. (Case 01544871, SR 542997)
- In Mobile Inspection and Mobile Code, resolved display issues that prevented you from scrolling through your list of inspections and made some parts of the window unavailable. (Case 01419357, Case 01420350, Case 01510571, Case 01523454, Case 01380189, SR 451353, Case 01491567, Case 01519285, SR 517785)

HF04

- Resolved a server error that occurred when you tried to reassign an inspection. (Case 01304868, Case 01330642, Case 01336111, Case 01372695, Case 01372765, Case 01455788, Case 01489467, Case 01510553, Case 01512344, SR 432478)

HF02

- Resolved an issue that prevented inspection results from saving and transferring to Community Development properly. (Case 01312220, Case 01361366, Case 01361564, Case 01362548, Case 01367869, Case 01342865, Case 01377932, SR 431270)
- Made additional changes in Mobile Inspection and Mobile Code (iTRAKiT) so that users currently in those applications are not included in the count of Community Development licenses in use. (SR 469326)

IVR (Interactive Voice Response)

HF13

- Corrected an issue where only the most recently added inspection was available to schedule through IVR. (Case 01687610, SR 627135)

HF12

- Corrected the Cancel Inspection feature so that users cannot cancel inspections after the cancel cut-off time you define in admin settings. (Case 01563580, SR 585497)

HF05

- Corrected IVR inspections so that, for permit inspections with two asterisks in the inspection type, the inspection's expiration date is cleared when a finaled date is added after resulting an inspection. (Case 01388348, SR 467465)

  To use this functionality, set the following preferences in WUM:

  - **Module Configuration** > **Permitting** > **Inspections** > **Preferences** > **Triggers**: in the **Inspection Triggers** section, select **Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is** and then select a result status.
  - **Module Configuration** > **Permitting** > *permit type* > **Preferences** > **Triggers**: in the **Date Triggers** section, select **Clear Expiration date when Finaled date is entered**.

Agency Center

HF14

- Corrected an issue that caused data to be duplicated on each tab when you edit an inspection for a permit and then view permit details. (Case 01332493, SR 431420)

HF02

- Made additional changes in Agency Center so that users currently in the application are not included in the count of Community Development licenses in use. (SR 469326)

Citizen Engagement

HF07

- Corrected the order of contacts on the **Submit Application - Application Contact** page to match the order defined in WUM. (ENG-63707, SR 550283)

HF04

- Corrected the order of items in the **Type** and **Subtype** drop-down lists to match the order defined in WUM. (ENG-59742, SR 507005)
- For applications submitted in Citizen Engagement, corrected the order of custom screens and fields on the application to match the order defined in WUM. (ENG-59544, SR 504657)
- Modified Community Development so that record number searches from Citizen Engagement are not case sensitive. (ENG-60186, SR 513405)
- Resolved an issue that caused duplicate fees on applications submitted in Citizen Engagement. (ENG-60272, SR 515205)
- Modified WUM to correctly pass required field settings for contacts to Citizen Engagement when a user adds a new contact. (ENG-59545, SR 504658)

HF02

- Modified services to resolve an issue that occurred when a citizen tried to schedule an inspection through Citizen Engagement. (Case 01397895, SR 458264)

Database changes

The 19.3 HF18 release does not include database changes.

The following database changes were made in previous hot fix releases:

- As of HF07, date fields are now stored as date and time, rather than date only. Searches by date need to be adjusted by extending the date range by one day.

Example: If you want to find all fees paid on January 4, 2021, you must now search for a date range of 1/4/2021–1/5/2021, which is actually 1/4/2021 12:00 AM – 1/5/2021 12:00 AM. If you search for 1/4/2021–1/4/2021, no results are returned because the beginning date and time is the same as the ending date and time.

Hot fix	Change ID	Database table	Column	Change
HF16	SR 877032	AEC_Licenses	LOCKID	Added column.
HF14	PBI 701919	AEC_MAIN CASE_MAIN Case_Parcels Case_Parcels_old Etrakit_Cart_Activities Etrakit_Cart_Activities_History geo_ownership License_Business License_Parcels LICENSE2_MAIN LICENSE2_PARCELS LICENSE2_PARCELS_old LicenseRenew_Review_Main Parcels Payment_Main	SITE_ ALTERNATE_ ID	Expanded the column from 40 to 50 characters.

Hot fix	Change ID	Database table	Column	Change
		Payment_Parcels Permit_Main Permit_Parcels Permit_Parcels_old PROJECT_MAIN Project_Parcels Project_Parcels_old		
HF14	SR 560756	project_main	planner	Expanded the column from 20 to 128 characters.
HF14	SR 429150	PRMRY_TIMETASKS	TASKNAME	Expanded the column from 30 to 60 characters.
HF14	SR 461012	CRM_lists	ISSUETYPE_ID	Added column.
HF12	PBI 612451	Trade		Added table for future use.
HF12	SR 487265	aec_trustaccts	trustacct_no	Expanded column from 20 to 33 characters.
HF11	SR 464403	Prmry_AdvSearch_CurrentDetail	Value1	Expanded column from 255 to 2000 characters.
HF11	SR 464403	Prmry_AdvSearch_LastDetail	Value1	Expanded column from 255 to 2000 characters.

Hot fix	Change ID	Database table	Column	Change
HF11	SR 464403	Prmry_AdvSearch_NewDetail	Value1	Expanded column from 255 to 2000 characters.
HF11	SR 464403	Prmry_AdvSearch_SavedDetail	Value1	Expanded column from 255 to 2000 characters.
HF11	SR 464403	Prmry_AdvSearch_SharedDetail	Value1	Expanded column from 255 to 2000 characters.
HF11	SR 464403	Prmry_AdvSearchConfigDetail	Value1	Expanded column from 255 to 2000 characters.
HF10	PBI 612058	PaymentTransactionReference		Added table.
HF08	SR 433967	Etrakit_User_Accounts	Company_ Name	Increased length to 60 characters
HF07	Feature 528205	FormulaComponent		Added table.
HF07	Feature 528205	PaymentQuery		Added table.
HF07	Feature 528205	PaymentQueryStatus		Added table.
HF07	Feature 528205	PaymentTransaction		Added table.
HF07	Feature 528205	PaymentTransactionEtrakitUser		Added table.
HF07	Feature 528205	PaymentTransactionFee		Added table.

Hot fix	Change ID	Database table	Column	Change
HF07	Feature 528205	PaymentTransactionLog		Added table.
HF07	Feature 528205	PaymentTransactionQuery		Added table.
HF07	Feature 528205	PaymentTransactionStatus		Added table.
HF07	Feature 528205	PaymentTransactionSubFee		Added table.
HF07	Feature 528205	PaymentTransactionType		Added table.
HF07	Feature 528205	Vendor		Added table.
HF07	Feature 528205	AEC_TRUSTACCTS	RECEIPT_NO	Expanded column from 10 to 60 characters.
HF07	Feature 528205	DBVersion	Id	Added primary key constraint.
HF07	Feature 528205	ETrakit_Vendor_Configuration	Id	Added column.
HF07	Feature 528205	ETrakit_Vendor_Configuration	VendorID	Changed primary key from column VendorID to column Id.
HF07	Feature 528205	ETrakit_Vendor_Configuration	VendorID	Added foreign key constraint for column VendorID pointing to column VendorId in table Vendor.

Hot fix	Change ID	Database table	Column	Change
HF07	Feature 528205	Fees	CODE	Expanded column from 12 to 20 characters.
HF07	Feature 528205	Fees	ACCOUNT	Expanded column from 30 to 60 characters.
HF07	Feature 528205	Fees	CHECK_NO	Expanded column from 20 to 60 characters.
HF07	Feature 528205	Fees	RECEIPT_NO	Expanded column from 20 to 60 characters.
HF07	Feature 528205	Fees	LOCKID	Expanded column from 30 to 60 characters.
HF07	Feature 528205	Fees	FEETYPE	Expanded column from 8 to 20 characters.
HF07	Feature 528205	Invoice_Main	InvoiceID	Added primary key constraint.
HF07	Feature 528205	Prmry_UserGroups	GroupRights	Expanded column from 255 to 8000 characters.
HF07	Feature 528205	Prmry_users	UserRights	Expanded column from 255 to 8000 characters.

Hot fix	Change ID	Database table	Column	Change
HF07	Feature 528205	Vendor_Configuration	Id	Added column.
HF07	Feature 528205	Vendor_Configuration	VendorID Id	Changed primary key from column VendorID to column Id.
HF07	Feature 528205	Vendor_Configuration	VendorID	Added foreign key constraint for column VendorID pointing to column VendorId in table Vendor.
HF05	PBI 524276	Etrakit_Roles_ContactTypes		Added table.
HF05	PBI 524276	Etrakit_Roles_Permissions		Added table.
HF05	PBI 524276	Etrakit_Roles_ContactTypes_Permissions		Added table.
HF04	PBI 522416	Etrakit_SearchFilters		Added table.
HF03	Feature 468211	aec_licenses		Added table.
HF03	Feature 468211	aec_main	all BusLic1 and BusLic2 columns	Moved data to aec_licenses.
HF03	Feature 468211	prmry_audittrail		Changed entries related to BusLic1 and BusLic2 fields in aec_main to point to the new table.

Hot fix	Change ID	Database table	Column	Change
HF03	Feature 468211	prmry_t9_admin_managepanels		Added an entry for the new **License Types** pane. Modified the entry for the **License Information** pane.
HF03	Feature 468211	prmry_preferences		Removed preferences related to BusLic1 and BusLic2 fields from aec_ main.
HF03	Feature 468211	etrakit3_preferences		Removed some preferences related to the BusLic1 and BusLic2 fields from aec_ main.
HF03	Feature 468211	etrakit_cart_activities	all BusLic1 and BusLic2 columns	Cleared values.
HF01	SR 395527	FEES	PAY_METHOD	Expanded the column to 200 characters.
HF01	SR 395527	AEC_TRUSTACCTS	PAY_METHOD	Expanded the column to 200 characters.
HF01	SR 395527	Bonds	PAY_METHOD	Expanded the column to 200 characters.

Hot fix	Change ID	Database table	Column	Change
HF01	SR 395527	Prmry_Bonds	PAY_METHOD	Expanded the column to 200 characters.
HF01	SR 460097	People	Sync_To_ CommonEntity	Set the default value to 1.
HF01	BUG 405140	Permit_Main	Permit.school	Expanded the column to 20 characters.
HF01	BUG 405140	Permit_Main	Permit.zone_ code1	Expanded the column to 40 characters.

Release history

Release	Date	Version
19.3 HF18	05/05/2022	19.3.18.1
19.3.17.4	04/07/2022	19.3.17.4
19.3.17.3	03/22/2022	19.3.17.3
19.3.17.2	03/17/2022	19.3.17.2
19.3.17.1	03/15/2022	19.3.17.1
19.3 HF17	03/01/2022	19.3.17.0
19.3 HF16	02/15/2022	19.3.16.0
19.3 HF15	01/19/2022	19.3.15.0
19.3.14.1	12/15/2021	19.3.14.1
19.3 HF14	12/09/2021	19.3.14.0
19.3 HF13	11/17/2021	19.3.13.0
19.3 HF12.1	10/11/2021	19.3.12.1
19.3 HF12	08/18/2021	19.3.12.0
19.3 HF11	06/15/2021	19.3.11.0
19.3 HF10	05/26/2021	19.3.10.0
19.3 HF09	05/05/2021	19.3.9.1
19.3 HF06	04/28/2021	19.3.6.1
19.3 HF09	04/14/2021	19.3.9.0
19.3 HF08	02/11/2021	19.3.8.0
19.3 HF07	12/11/2020	19.3.7.1
19.3 HF06	12/10/2020	19.3.6.1
19.3 HF07	11/23/2020	19.3.7.0
19.3 HF06	10/08/2020	19.3.6.0

Release	Date	Version
19.3 HF05	09/11/2020	19.3.5.0
19.3 HF04	08/10/2020	19.3.4.0
19.3 HF03	05/26/2020	19.3.3.0
19.3 HF02	03/30/2020	19.3.2.0
19.3 HF01	01/31/2020	19.3.1.0
19.3 GA	01/02/2020	19.3.0.0

Supported browsers

Community Development release 19.3 HF18 supports Google Chrome, Microsoft Edge based on Chromium, and Internet Explorer 11.

Supported operating systems and database servers

A typical premise installation includes:

- Database server
- Application server
- Web server

These servers must run Windows Server 2012 R2 or later with one of the following SQL Server versions:

- SQL Server 2019
- SQL Server 2017
- SQL Server 2016

Important: The state of California's Contractors State License Board (CSLB) requires Windows Server 2016 or later for security reasons.