What's New in Granicus: March 4, 2016

Hosted Updates

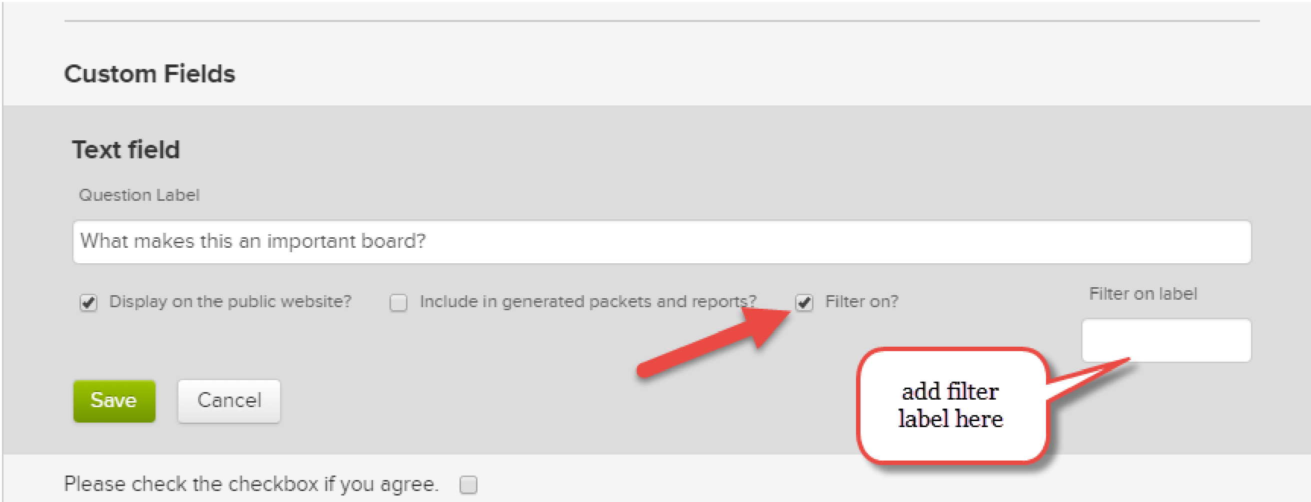
Hosted services are automatically updated on the night of the release (March 4). You do not need to perform any specific actions to receive these updates.

Jump to Release Notes for a Specific Product:

Highlights from this Release

New Filter Option for Custom Appointment Fields in Boards and Commissions

The **Short Text**, **Checkbox**, **Single Select**, and **Date** field options on the new Appointment Custom Details page all now have a F**ilter on** option. From **Tools** > **Board Customizer** > **Appointment Custom Details**, you can check the **Filter on** for any of the above custom fields, and when **Filter on** is checked, a **Filter on label** field displays. The label name for that field displays under the **More** drop-down menu on the Appointments page. When you select the custom appointment filter from this menu, it appears along the top of the page with the default filters. Clicking the filter will select a drop-down menu that allows you to filter by the answers for that specific custom appointment question.



Navigation Improvements for Peak Agenda Items

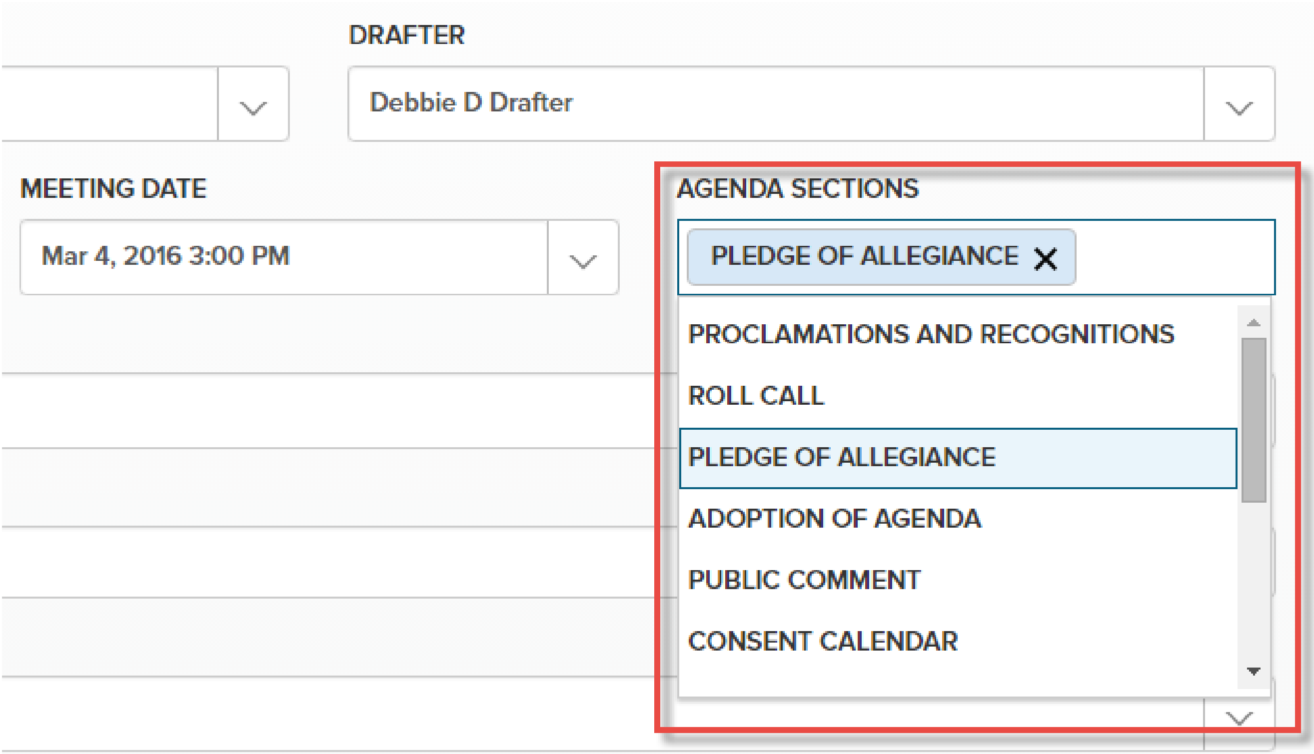
We've made some user-friendly changes to the navigation for working with Agenda Item Details. The idea is that while you're editing your agenda item, you'll always stay on the Item Details page and not be redirected to another page (before, you'd land on the ITEMS page after making changes). You'll navigate where you want to go when you wish to do so (e.g., use the **View Agenda** button to get back to the agenda or the **Items** tab to get to the items page).

1. If you select **Edit** on an agenda item from the Agenda page or the Items list page, when you select **Cancel** or **Save**, you'll remain on the same Item Details page and your changes will be undone or saved, respectively.

2. If you're creating a new agenda item and select **Cancel**, the application returns you to the Items list view. If you select **Create**, the application saves the new agenda item (provided all required fields are complete and valid) and takes you to the Edit mode for the newly created item. If you select **Set up approvals** check box before clicking **Create**, you'll be taken to the **Set up Approvals** page (in this case there is no change).

Agenda Items Can Now Appear on Multiple Agenda Sections in Peak

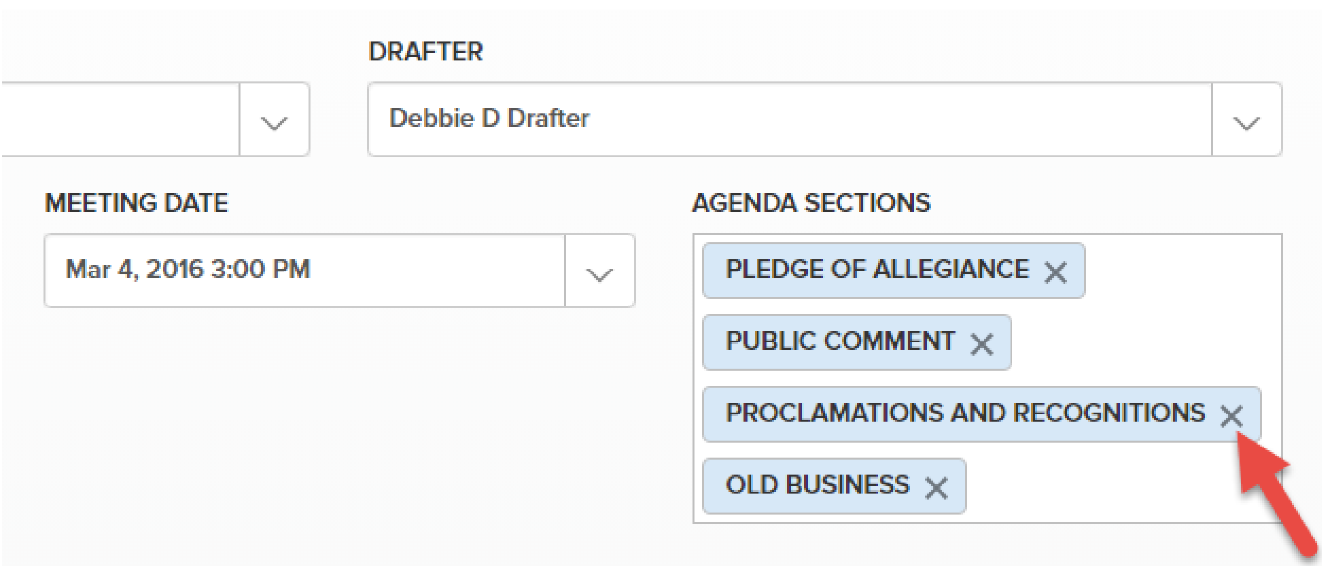
This new feature enables the Admin, Agenda Coordinator, or Drafter (of their own item) to select one or more agenda sections under which the item will be listed on an agenda. Click within the **AGENDA SECTIONS** field to see a menu of available sections, then click on a desired section. Click within the field again to choose an additional section.



This option is available on both the **Create New** > **Agenda Item** page and the **Add Item** option accessed via the left menu of an agenda's details.

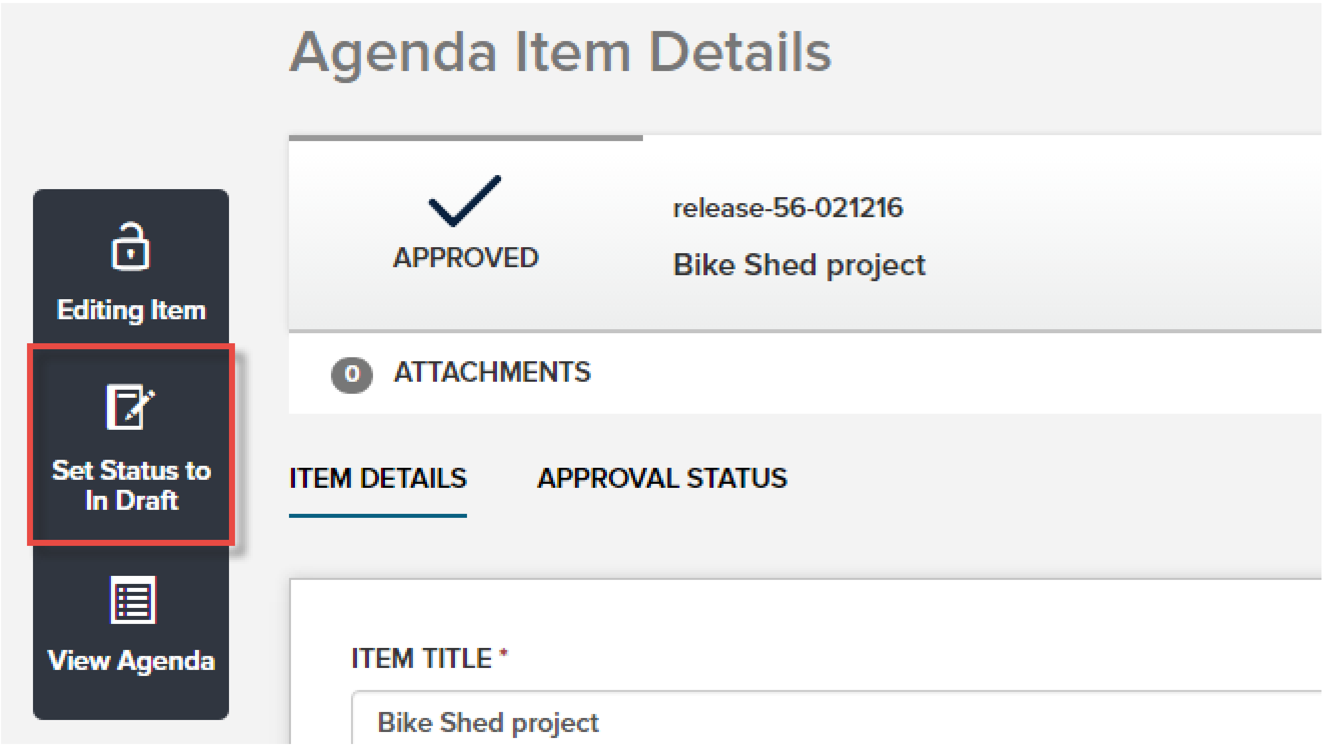
If you edit the agenda item (e.g., change to title, agenda date, attachments) and the item is listed under more than one section, the change will apply to all instances of the item. This means that if the agenda date is changed, the item is removed from all sections. If the title is changed, the title updates in all instances of the item under the different sections.

An agenda item can be removed from one, some, or all sections of an agenda by Agenda Details or via the **Item Details** tab on the agenda item by clicking the **x** next to the section's name.



New Set To Approved/Set To Draft button for Agenda Items in Peak

There's a new **Set to Approved/Set to Draft** button on the Agenda Item Details page when editing an agenda item. This button appears only if the item is unlocked. If the agenda item is **In Draft**, the button will read **Set to Approved**. If the agenda item is **Approved**, the button will read **Set Status to In Draft:**

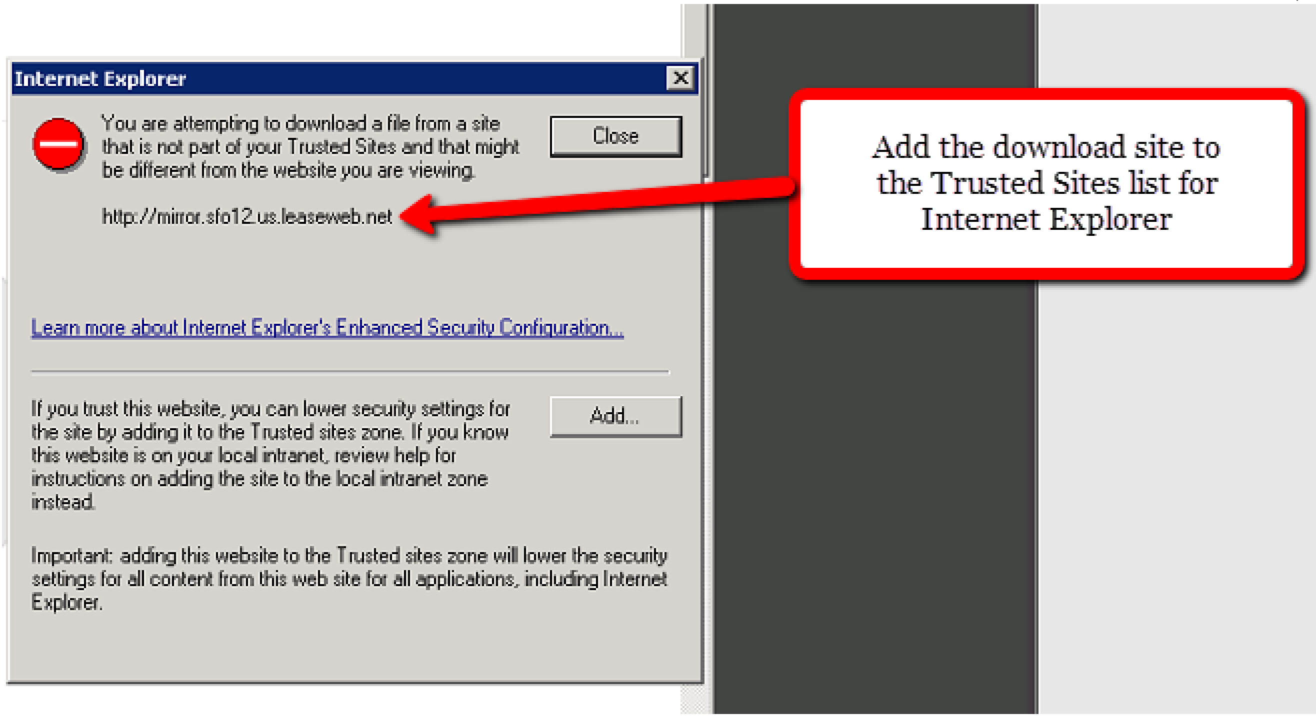


The purpose of these buttons is for Admins, Agenda Coordinators, and Drafters (when it's their item) to be able to set an agenda item immediately to **Approved** without undergoing an approval workflow. It also allows these same roles (Drafter can take this action for their item only if an Admin or Agenda Coordinator unlocks the item first) to move an item's status back to **In Draft** if further changes are needed. Read more details in the release note below.

LiveManager Preview Issue Resolved

A LiveManager preview issue has been addressed. When accessing the Audio/Video Preview in LiveManager, if the current version (v2.2.2) is not installed, there will be a prompt and a link in the Audio/Video Preview window. If Internet Explorer Enhanced Security Configuration is enabled on the server, the download will not automatically start, and you'll have to use the **Click Here** link to start the download.

You'll then have to add the download site to the Trusted Sites list for IE:



What's New in Boards & Commissions

New Features

Filter Option for Custom Appointment Fields in Boards and Commissions

The **Short Text**, **Checkbox**, **Single Select**, and **Date** field options on the Appointment Custom Details page all now have a **filter on** option. From **Tools** > **Board Customizer** > **Appointment Custom Details**, you can check the **filter on** for any of the above custom fields, and when **filter on** is checked, a **Label** field displays. The label name for that field displays under the **More** drop-down menu on the Appointments page. When you select the custom appointment filter from this menu, it appears along the top of the page with the default filters. Clicking the filter will select a drop-down menu that allows you to filter by the answers for that specific custom appointment question.

Bug Fixes

Reappointing a member from Actions drop-down menu returns a 500 error

The Reappoint This Member option in the Action drop-down menu again allows you to reappoint a member on a board.

Auto Delete of applications not working

Applications with a status of In Progress and Not Submitted will now delete after 14 days of inactivity.

Internal Tracking Date field in People does not allow input

You can again add or edit the date within a Date field in the Internal Tracking section of a person record

Application Builder: Unable to edit the Thank You Page

- **SalesForce Case #248565**

Clicking the pencil icon on the Thank You Page section of the application builder again enables you to edit the content of the page.

Boards Expiring and Terms Ending Soon count not updating correctly on public site

- **SalesForce Case #235880**

The current vacancy, terms expired, and terms ending soon now show the correct counts in the webpage designer and on the public-facing website.

Unable to change board names

- **SalesForce Case #249622**

Users can again edit board names using the pencil icon.

Application notification emails to Admins do not include a link to view the application

- **SalesForce Case #230073**

The staff notification email sent to the administrator when a citizen submits an application now contains a link to the newly submitted application. If the staff member is not logged in to the Granicus Platform, the link redirects to the Granicus Platform login page. Once the staff member logs in, the Boards and Commissions People page opens with the application displayed in the right-hand pane.

Unable to change the status of an application

When an application status is changed, the changes are now preserved after you're finished editing.

What's New in Peak Agenda Management

New Features

Items page: new Meeting Date filter

This capability enables you to filter agenda items based on a specific meeting date. Selecting a meeting date prompts the system to show only those items scheduled for the specified meeting date.

You'll select a meeting body, which will then populate the **Meeting Date** drop-down menu with meetings for that body only. If no meeting body is selected, the selected meeting date populates the menu with meeting dates for all bodies. Meeting dates populate in the drop-down menu regardless of whether they have agenda items attached to them; selecting a meeting without agenda items will return no items in the search.

Agenda Item navigation changes

We've made some user-friendly changes to the navigation for working with Agenda Item Details. The idea is that while you're editing your agenda item, you'll always stay on the Item Details page and not be redirected to another page (before, you'd land on the ITEMS page after making changes). You'll navigate where you want to go when you wish to do so (e.g., use the **View Agenda** button to get back to the agenda or the **Items** tab to get to the items page).

1. If you select **Edit** on an agenda item from the Agenda page or the Items list page, when you select **Cancel** or **Save**, you'll remain on the same Item Details page and your changes will be undone or saved, respectively.

2. If you're creating a new agenda item and select **Cancel**, the application returns you to the Items list view. If you select **Create**, the application saves the new agenda item (provided all required fields are complete and valid) and takes you to the Edit mode for the newly created item. If you select **Set up approvals** check box before clicking **Create**, you'll be taken to the **Set up Approvals** page (in this case there is no change).

Default Meeting Location field is now multi-line and has an increased character limit

The Default Meeting Location field on the Meeting Body form in **Admin** > **Bodies** > **Meeting Bodies** now allows for multiple lines of text for a total of 1000 characters. There is also an increased size for the **Default Meeting Location** field on the Create/Edit Meetings form (also 1000 characters). When an agenda is downloaded/published for a particular meeting, the agenda report will support the increased length of the meeting location description.

New Set To Approved/Set To Draft button for Agenda Item Detail

There's a new **Set to Approved/Set to Draft** button on the Agenda Item Details page when editing an agenda item. This button appears only if the item is unlocked. If the agenda item is **In Draft**, the button will read **Set to Approved**. If the agenda item is **Approved**, the button will read **Set Status to In Draft:**

The purpose of these buttons is for Admins, Agenda Coordinators, and Drafters (when it's their item) to be able to set an agenda item immediately to **Approved** without undergoing an approval workflow. It also allows these same roles (Drafter can take this action for their item only if an Admin or Agenda Coordinator unlocks the item first) to move an item's status back to **In Draft** if further changes are needed.

Clicking the **Set to Approved** button will change the status of the item to Approved and will automatically lock the item. Clicking the **Set Status to In Draft** button will change the status of the item to In Draft (the item must be unlocked before this action can be taken).

If you initiate an approval workflow on the item, the **Set to Approved** button will disappear. It will not reappear until the workflow is completed and the Admin or Agenda Coordinator unlocks the item. The button will also reappear if you stop approval workflow by clicking the **Restart Workflow** button and do not reinitiate it.

An item can now be placed under multiple sections of the same meeting agenda

This feature enables the Admin, Agenda Coordinator, or Drafter (of their own item) to select one or more agenda sections under which the item will be listed on an agenda. Click within the **AGENDA SECTIONS** field to see a menu of available sections, then click on a desired section. Click within the field again to choose an additional section.

This option is available on both the **Create New** > **Agenda Item** page and the **Add Item** option accessed via the left menu of an agenda's details.

If you edit the agenda item (e.g., change to title, agenda date, attachments) and the item is listed under more than one section, the change will apply to all instances of the item. This means that if the agenda date is changed, the item is removed from all sections. If the title is changed, the title updates in all instances of the item under the different sections.

An agenda item can be removed from one, some, or all sections of an agenda by Agenda Details or via the **Item Details** tab on the agenda item by clicking the **x** next to the section's name.

Bug Fixes

Adding an approver to phase does not immediately render

When you edit a workflow in Admin and add an approver to a workflow phase, the approver avatar now displays immediately after you click the **Add** button rather than requiring you to refresh or save the phase.

Deleting a user from the platform changes the name of the corresponding approver to "Unable list"

When a user who is in a workflow template in Admin or in a workflow on an agenda item is deleted from the platform, the user's avatar will no longer appear in the phase. When the phase is next edited, an avatar called "User Deleted" will display in place of the deleted user's avatar. You should delete these entries from the workflow template in **Admin** > **Agenda Items** > **Manage Approvals** to avoid seeing them on workflows using this template going forward. In a future enhancement, these avatars will be automatically deleted so that an Admin will not have to manually delete them.

Clicking A NEW WORKFLOW does not always cause the phase creator to display

The phase creator now always displays when you click **A NEW WORKFLOW** to build a workflow from scratch on the Agenda Item Details view. There were some cases (particularly when creating a new agenda item and using the **Set Up Approvals** check box) in which clicking this button would not display the phase creator.

Existing workflows are not always loading on the Approval Status page

On the Agenda Item Details view, the list of available approval workflow templates now always displays. There were previously some instances (particularly when creating a new agenda item and using the **Set Up Approvals** check box) in which the existing workflows would not load.

Removing workflow template to start over is not working after refreshing screen

You can now select an existing workflow template or create a new workflow on the fly in the following scenario: Chose a workflow template, use the workflow, refresh the screen (as if you had navigated elsewhere in the application or logged out for the day), then decide to discard this template by choosing Remove Template. At this point, you can select an existing workflow template or construct another workflow on the fly.

The Search field on the Add an Agenda Item page is not clearing between uses

Prior to this fix, if you used the **Add Item** button on an agenda, then used the **Search items** field on the **Add an Agenda Item** page, your original search results would be retained for subsequent additions of agenda items, even though the **Search items** field appeared to be blank. You'll now have unfiltered search results each time the **Add Item** option is chosen from the left menu on an agenda.

People's avatars are not loading on Approval Workflows or in Agenda Item Approval status

The image file stored in a person record now displays as the avatar on approval workflows on agenda items, approval workflows in Admin, and on an item's comment pane. People's pictures also still appear on their dashboards when they log in. If a person record does not have a picture, a standard colored avatar is displayed.

Editing approval workflow not working correctly in Admin

When a phase was edited and an approver removed via **Admin** > **Agenda Items** > **Manage Approvals**, upon saving, the phase redisplayed with the change but without the ability to continue editing. We've fixed the issue, and editing works as it should.

Editing an agenda item with a radio button custom field set to No gives an error message

If a custom radio button field is set to **No** on an agenda item, an update to that agenda item will no longer flag the radio button field as unpopulated.

Cannot create or edit an agenda item with a custom radio button field (Internet Explorer)

Agenda items using custom radio button fields can now be created and updated while using Internet Explorer. Before this fix, one of three things would happen upon the attempt: 1) fields would not select, 2) values would blank out when fields would lose focus, or 3) changes to fields would not be present upon subsequent review.

Deleting the last phase of an approval workflow leaves you with an un-editable phase

Upon deleting the final phase of a workflow, the phase creator would display, but the **pencil**, **move**, and **trash can** icons would be grayed out. You'd then be forced to click **REMOVE TEMPLATE** to start over. This has been fixed; the phase creator is available after you delete the final phase of a workflow created on the fly or from a template.

Internet Explorer 10 does not truncate long Item Title fields on Agenda Item cards

Long agenda item titles are now truncated correctly wherever the agenda item cards are displayed (Agenda, Items, and Item Details view).

Users with photographic avatars are offset on workflows in Internet Explorer 10 and 11

Approvers with photos are now properly aligned with approvers using the colored avatar. This applies to approval workflows in Admin and workflows on agenda items.

Navigation freezes upon attempt to return to ITEMS page after removing an agenda item

After adding and removing an agenda item from an agenda, you could not go directly to the ITEMS page; the system would require a screen refresh. Now you can go to the ITEMS page after taking these actions without any issue.

If a new agenda item attachment is renamed before the item is saved, the attachment does not retain its new name

While editing an agenda item, if you attach a file to the agenda item and then rename the file before saving the agenda item, once you save the change the new attachment name displays correctly on the agenda item card.

System does not allow creation of one-time or recurring meetings after examination of meeting details

After examining the meeting details from the agenda page, you can now create new one-time and recurring meetings.

Renamed attachment displays on the progress spinner when uploading files to an agenda item

When you’re creating or editing an agenda item and you add and then rename and attachment before saving, the new file name will show in the progress spinner as the file is uploaded to the system.

Canceling out of the Add an Agenda Item page does not clear information between uses

Prior to this fix, if you selected an item to add to an agenda and selected the section(s) you wanted it on but then canceled out of the Add an Agenda Item page, the information was retained. When you returned to the page to add an item, the display indicated that data had been cleared, but it was not. Now, the data from the previous transaction is cleared, and you can start with a clean slate to add a new or existing item to the agenda.

Locked version of agenda item should honor carriage returns and white space for Item Title, Suggested Action, and custom Text Area fields

Carriage returns in the **Item Title**, **Suggested Action**, and custom field text areas for an agenda item in the locked version of the agenda item are honored. The locked version of the item looks very similar to the unlocked version with the exception that white space (e.g., a paragraph indent) is honored in an unlocked item but not honored in a locked item. This locked version can give an indication of what the unformatted value of these fields will look like on an agenda report/packet.

Drafters should not be able to lock/unlock a Final agenda nor add sections and items when unlocked

This fix restores the pre-2/12/16 functionality of blocking a Drafter from performing operations on an agenda that is marked as Final. These actions include locking and unlocking the agenda and adding items or sections from the agenda page. The Drafter can still rearrange and delete sections on a finalized agenda, so it is up to the Agenda Coordinator or Admin to lock an agenda once it is finalized.

System messages now display at the bottom of the page

As part of an improved user interface, and with agenda item **SAVE** and **CANCEL** leaving the user on the Item Details page, system messages (errors and confirmations) now display at the bottom of the form.

Editing a platform meeting without meeting body/type results in infinite spinner

When you click **SAVE** on meeting details of a platform-created meeting without populating any details of the meeting (meeting body or meeting type), you'll no longer get an infinite spinner. You can populate the meeting body and type from the Details form, but we recommend accomplishing this from the Agenda view instead. The Agenda view gives you the option of selecting/reselecting meeting body and type before saving, whereas the meeting details form in this case does not.

Locked and unlocked states of an agenda item do not reflect the same order of custom fields

The locked mode of an agenda item now shows the custom fields in the same order as the unlocked mode.

What's New in LiveManager

Live Manager Preview Issue Resolved

- **SalesForce Case #233362**

A LiveManager preview issue has been addressed. When accessing the Audio/Video Preview in LiveManager, if the current version (v2.2.2) is not installed, there will be a prompt and a link in the Audio/Video Preview window. If Internet Explorer Enhanced Security Configuration is enabled on the server, the download will not automatically start, and you'll have to use the **Click Here** link to start the download. You'll then have to add the download site to the Trusted Sites list for IE.

What's New in eAccept

Add/Remove Credit Cards: Pay Recurring Subscription

You can now choose which credit card to use for a recurring subscription.

Add/Remove Credit Cards: Check Subscription Page

When you log in to your account, whether for the first time after signing up or otherwise, your account will be checked for a pending payment. If you have a pending payment, the system will display a message with the amount due along with the default credit card on file and a **Pay Now** button.

Add/Remove Credit Cards: Remove Credit Card

We've added a new functionality to allow users to remove any credit card on their account.

Add/Remove Credit Cards: Add multiple credit cards

We've added a new functionality to allow users to add multiple credit cards to their account.

Add/Remove Credit Cards: Recurring Subscription Payment Billing Cycle - Deleted CC

When recurring subscription payments can't be processed due to a deleted credit card on file, users will be notified and subscriptions will be suspended.

What's New in ROAM

Single Row Search: Final Edits

We've added a new column, Image Status, to the Single Row Search's result. It shows the value "Y" for documents with scanned image and "N" otherwise.

Single Row Search: Modify user interface to handle extra results

In order to keep page sizes small, we've modified the user interface in the Single Row Search to hide more than 10 results in columns with multiple values. Instead, a link is displayed that leads to the Details page, where a full list of parties, RPCs, Legal, etc., can be found and viewed.

Elastic Search: Single Row Search filters

We've fixed an issue in which any data that has multiple values per Instrument, like Party Names, does not fully load with filters in Single Row Searches. Users can now set any column as a filter and the filter displays all of the data, regardless of whether it is multi-value, e.g., “Party Names.”

Layouts with Collapsible Panels should have Panels for each Archive folder

We've changed the collapsible panels on templates to represent the archive folder names rather than the meeting body names.