iEdison Version 4.12.2.0 Release Notes

New Features

Agencies Only now have the Ability to Manage their Point of Contact Information

There is now the ability for Agencies to manage their point of contact information via the **Agency Administration** tab and screen. This functionality eliminates the need for manual Agency information updates.

The **Agency Administration** tab only appears for users with the IDO Administrator, IDO User, or other Agency administrative roles.

1. Users with the IDO Administrator role are able to view all Agencies and create/edit only their primary Agency's information.

2. Users with the IDO User role can only view all agencies contact information.

Agency Administration Screen

1. To access the *Agency Administration* screen, login into iEdison.

2. Click the **Agency Administration** tab next to the **Search Documents** tab located at the top of the screen.

When the **Agency Administration** tab is clicked, the *Agency Administration* screen displays the contact information for the affiliated Agency based on the login ID/role.

The following button options appear in the top right hand corner:

- **Modify Contacts** – allows edit and delete of current contact information

- **Add Contact** – allows adding a private and/or public contact information

- **Refresh** – refreshes the current view

In the *All Agencies* section is view only with a search option and an **expand/collapse** button.

Figure 1: Agency Administration Screen Displaying Agency Information
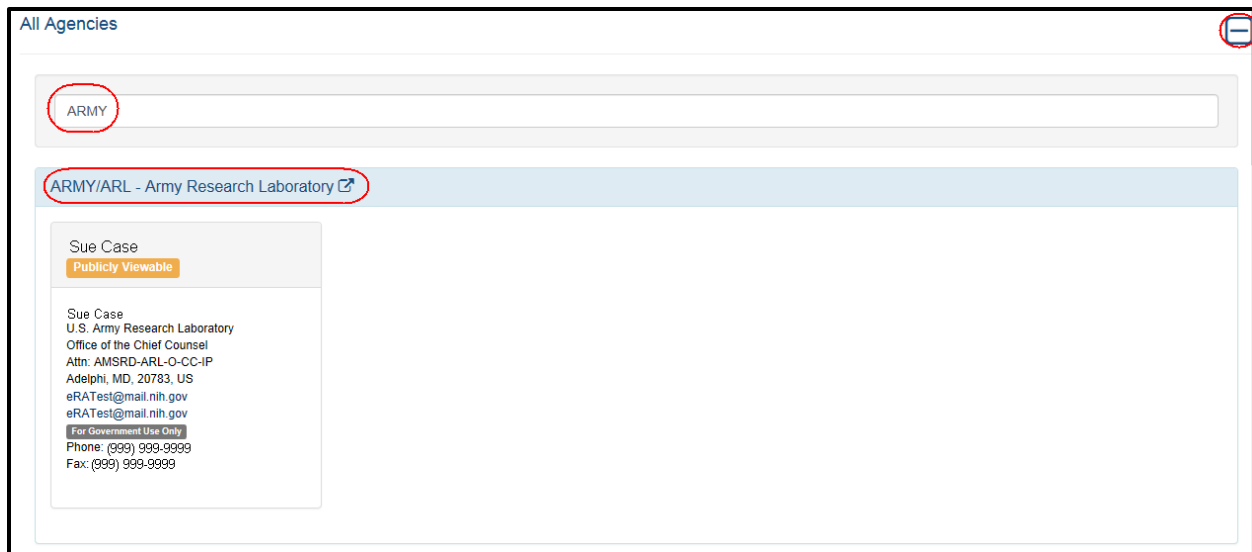
Perform a Search

Figure 2: Agency Administration Screen's All Agencies Section Displaying Search Results

1. To perform a search, enter a partial or full Agency name.

The system automatically displays the desired matching Agencies.

2. To view the Agency's web site, click the **Agency Name** hyperlink in the blue bar.

Add an Agency Contact

1. To add an Agency contact, click the **Add Contact** button on the *Agency Administration* screen.

When the **Add Contact** button is clicked, the system displays the *Agency Administration – Contact Form* screen.

NOTE:

First Name and **Last Name** are required fields. If the names fields are not entered, the system displays the following error message: *<Field Name> is a required field*.

If a country other than the United States is selected, the **State** field is disabled.

If the contact is visible to the public, then all users are able to view the comments. If the contact is visible to internal users only, then only internal users per login ID/role can view the comments.

Figure 3: Agency Administration - Contact Form Screen Displaying Adding an Agency

3. Under Agency name, select one of the following options:

   a. **Visible to internal users only** (Not viewable on iEdison *Home* screen via the **Agency Office Contacts** hyperlink)

   b. **Visible to general public** (Viewable on iEdison *Home* screen via the **Agency Office Contacts** hyperlink)

4. Complete the appropriate information.

5. Perform one of the following options:

   a. Click the **Save** button to save the new contact.

   b. Click the **Cancel** button to exit the screen.

When the **Save** button is clicked, the system displays the *Agency Administration – Contact Form* screen with the following message: *Contact saves successfully*.
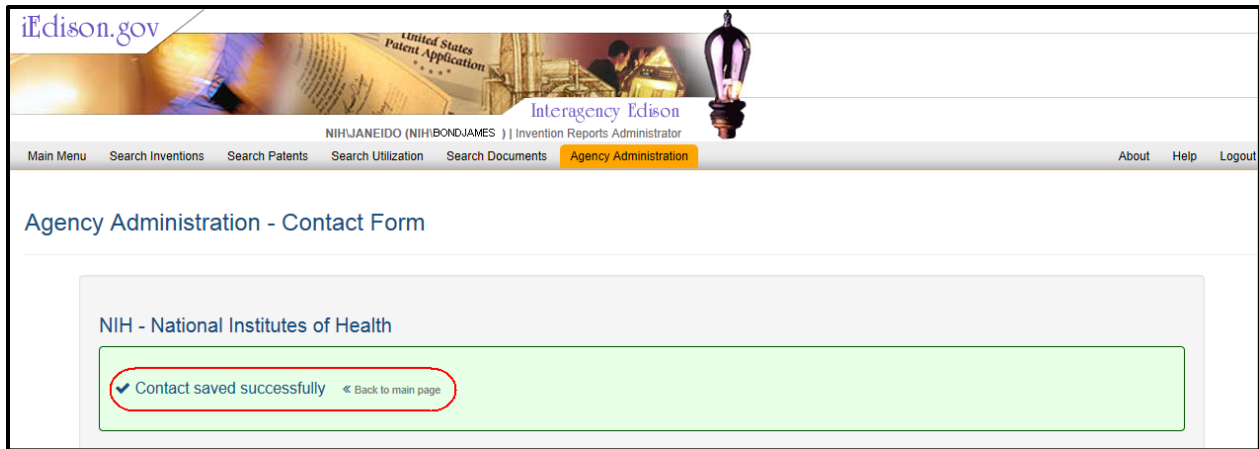
Figure 4: Agency Administration - Contact Form Screen Displaying Successful Save Message

6. To return to the *Agency Administration* screen, perform one of the following options:
   a. Click the **Back to main page** hyperlink in the successful message section.
   b. Click the **Back to main page** button at the bottom of the screen.
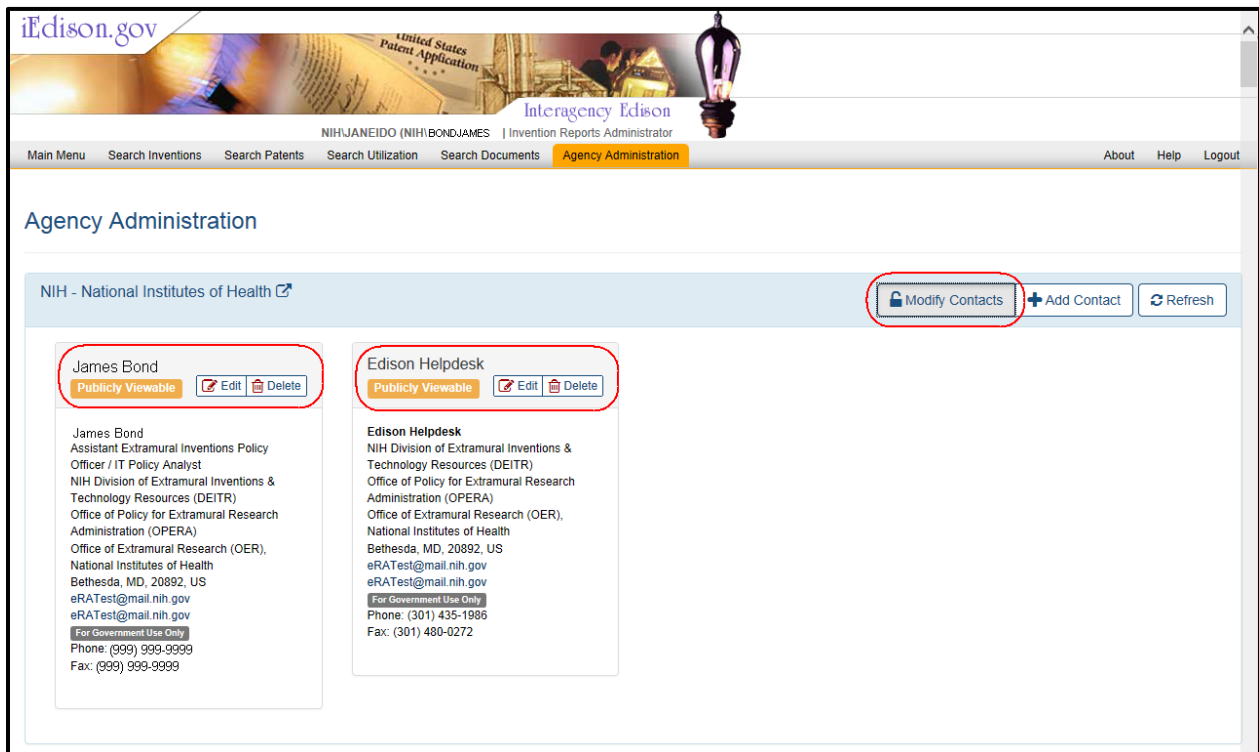
Modify Contact Information

Figure 5: Agency Administration Screen Displaying Modify Contacts Feature

1. To modify contact information, click the **Modify Contacts** button.

When the **Modify Contacts** button is clicked, an **Edit** and a **Delete** button are displayed next to each existing contact information.

2. Click the **Edit** button to edit the appropriate contact.

When the **Edit** button is clicked, the system displays the *Agency Administration – Contact Form* screen.

NOTE:

First Name and **Last Name** are required fields. If the names fields are not entered, the system displays the following error message: *<Field Name> is a required field*.

If a country other than the United States is selected, the **State** field is disabled.

If the contact is visible to the public, then the all users are able to view the comments. If the contact is visible to internal users, then only internal users per login ID/role can view the comments.

Figure 6: Agency Administration - Contact Form Screen Displaying Editing Feature

3. Edit the appropriate information.

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4. Perform one of the following options:
   a. Click the **Save** button to save the new contact.
   b. Click the **Cancel** button to exit the screen.

When the **Save** button is clicked, the system displays the *Agency Administration – Contact Form* screen with the following message: *Contact saves successfully*.
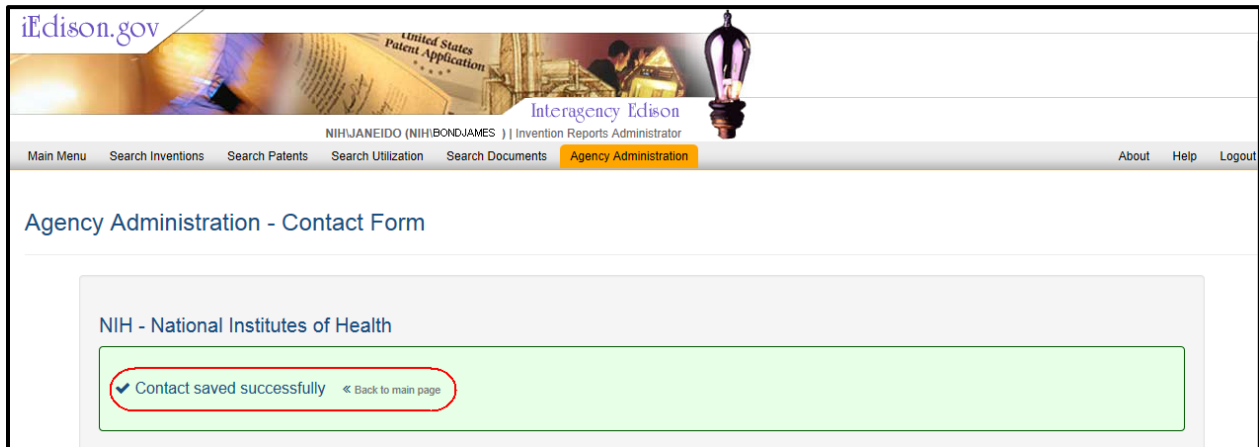

Figure 7: Agency Administration - Contact Form Screen Displaying Successful Save Message

7. To return to the *Agency Administration* screen, perform one of the following options:
   a. Click the **Back to main page** hyperlink in the successful message section.
   b. Click the **Back to main page** button at the bottom of the screen.

Delete Contact Information

1. To modify contact information, click the **Modify Contacts** button on the *Agency Administration* screen.

When the **Modify Contacts** button is clicked, an **Edit** and a **Delete** button are displayed next to each existing contact information (see Figure 5).

3. Click the **Delete** button to delete the appropriate contact.

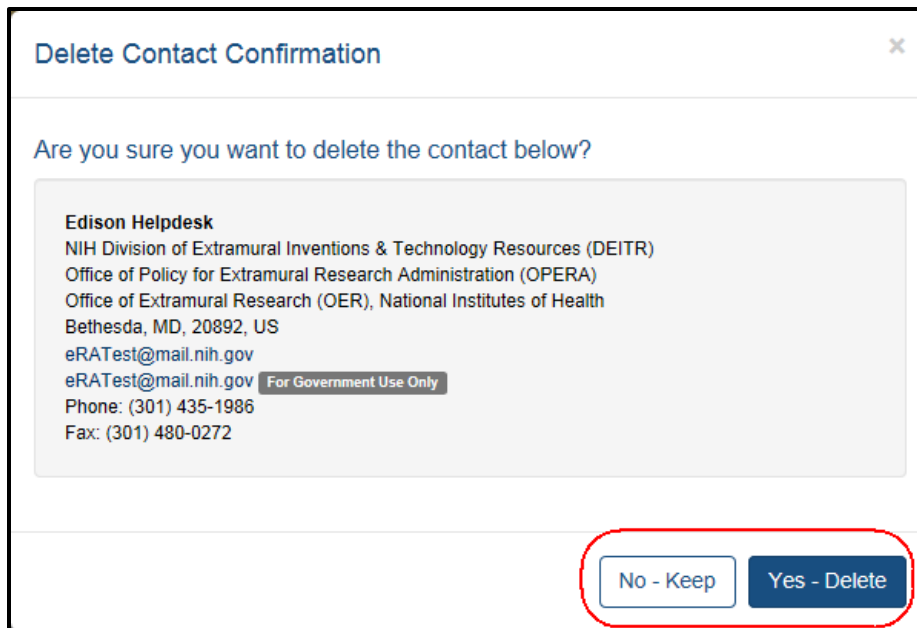When the **Delete** button is clicked, the system displays the *Delete Contact Confirmation* screen.

Figure 8: Delete Contact Confirmation Screen Displaying a Sample Delete

When the **Yes – Delete** button is clicked, the system returns to the *Agency Administration* with contact record deleted.