

Process to add or replace a file in Accela

This is used when a file verification fails due to naming or other issues. You can request the applicant to re-submit or you can add documents yourself. Please note that once the review is assigned, this can no longer be done.


In Accela, click the documents tab to see the document with the issue.

The screenshot shows the Accela Civic Platform interface. The top navigation bar includes the Accela logo and the project name 'LONGBOAT'. The main content area displays the 'Documents (4)' tab. On the left, there is a sidebar with various tabs: Documents (4), Comments (0), Conditions (0), Conditions of Approval (0), Related Records, Consolidated Record Activities (6), Status History (3), and Activity Summary (2). The main area shows a table of documents with columns: Document Status, File Name, Actions, Entity Type, Category, Description, and Virtual Folders. The first row is highlighted in blue and shows 'Verification Failed' for the file 'COYLE, LONG BOAT KEY, S.pdf'. The other three rows show 'In ePlanReview' for 'RecordedDocument.pdf', 'Coyle Permit.pdf', and 'Coyle Condo Plot Plan.pdf' respectively. The 'Actions' column for the first row is expanded, showing options: Assign, Download, Preview, Review, and View Doc Info.

Download the document – It should be in your downloads folder or accessible in downloads in your browser (... then downloads).

This block provides a closer look at the document table from the previous screenshot. It shows the top navigation buttons: Menu, New, Look Up, Manage Documents, Help, and Refresh. Below these are radio buttons for 'Record Attachments' (selected) and 'People Attachments'. The table lists four documents. The first document, 'COYLE, LONG BOAT KEY, S.pdf', is highlighted. Its 'Actions' column is expanded, showing a dropdown menu with the following options: Assign, Download (highlighted in blue), Preview, Review, and View Doc Info. The other three documents are 'RecordedDocument.pdf', 'Coyle Permit.pdf', and 'Coyle Condo Plot Plan.pdf', all with 'In ePlanReview' status.


Rename the file located on your computer. After renaming, In Accela, you will add the new document by clicking Add.

BR-SCRN-25-0001 
 Install Screen Enclosure ...

STATUS > In Review
 05/07/2025 by Patti F...

LOCATION > 2191 HARBOURSIDE ...
 Longboat Key, FL 342...

CONTACT > John Foens

WORKFLOW > 19 total Task
 ● 7 completed 

Documents ▲

Save **Add** Delete Cancel Help

Source * ACCELA ▼

Document Group/... B_GE ▼ --Sel ▼

ACA Permissions **Change**
 Follow Document Type Security

Description

Department **Current Department**
 Building Plans E ▼

check spelling


Form Name: Document Form

Apply Definitions to Selected

☐ File Name * Up to 250MB Document Group/Category Department Description ACA Permissions

Upload the file and put a description if you need. Now Click Save.


The file will show up. It may show verification in Progress. Wait a few seconds and click the Document area to refresh the status.

BR-SCRN-25-0001 
 Install Screen Enclosure ...

STATUS > Ready for Review
 05/06/2025 by Marie ...

LOCATION > 2191 HARBOURSIDE ...
 Longboat Key, FL 342...

CONTACT > John Foens

WORKFLOW > 19 total Task
 ● 1 completed 

Documents (5) ▲

Menu ▼ New Look Up Manage Documents ▼ Help Refresh

☒ Record Attachments ☐ People Attachments

<input type="checkbox"/>	Document Status	File Name	Actions	Entity Type	Category	Description	Virtu
<input type="checkbox"/>	Verification Failed	COYLE, LONG BOAT KEY, S.pdf	Actions ▼	Record	Plans		
<input type="checkbox"/>	In ePlanReview	RecordedDocument.pdf	Actions ▼	Record	Other		
<input type="checkbox"/>	In ePlanReview	Coyle Permit.pdf	Actions ▼	Record	Other		
<input type="checkbox"/>	In ePlanReview	Coyle Condo Plot Plan.pdf	Actions ▼	Record	Site Plan		
<input type="checkbox"/>	Verification in Progress	COYLE LONG BOAT KEY S.pdf	Actions ▼	Record	Plans	Rev...	

Now you can delete the old failed document. Select the box to the left of the document and select “Manage Documents” to delete it.

Accela Civic Platform > LONGBOAT

BR-SCRN-25-0001
Install Screen Enclosure ...

STATUS > Ready for Review
05/06/2025 by Marie ...

LOCATION > 2191 HARBOURSIDE ...
Longboat Key, FL 342...

CONTACT > John Foens

Documents (5)

Menu New Look Up Manage Documents Help Refresh

Record Attachments People Attachments

Document Status File Name

Verification Failed COYLE, LONG BOAT

In ePlanReview RecordedDocument.pdf

In ePlanReview Coyle Permit.pdf

In ePlanReview Coyle Condo Plot Plan.pdf

In ePlanReview COYLE LONG BOAT KEY S.pdf

Info Download Compare Documents Set Display Image Clear Display Image ACA Permission Delete

Actions Entity Type

Record Record Record Record

If you want to see if the document is in E-plan, you can select it under actions. However, it will only show under Intake until the plans are processed within Accela

BR-SCRN-25-0001
For Permitting - Residential Screen Enclosure
2191 HARBOUR OAKS, Longboat Key FL 34228

OPEN 1ST ?

DETAILS DOCUMENTS INTAKE 2 ASSIGNMENTS COMMENTS REVISIONS DELIVERABLES

Found 0 Records

COLUMN FILTER

Show Assignment Status

Show My Group ACTV, APPR, APCD, APS...

No Records Found.

Once they are assigned, it should allow you to start the review process.