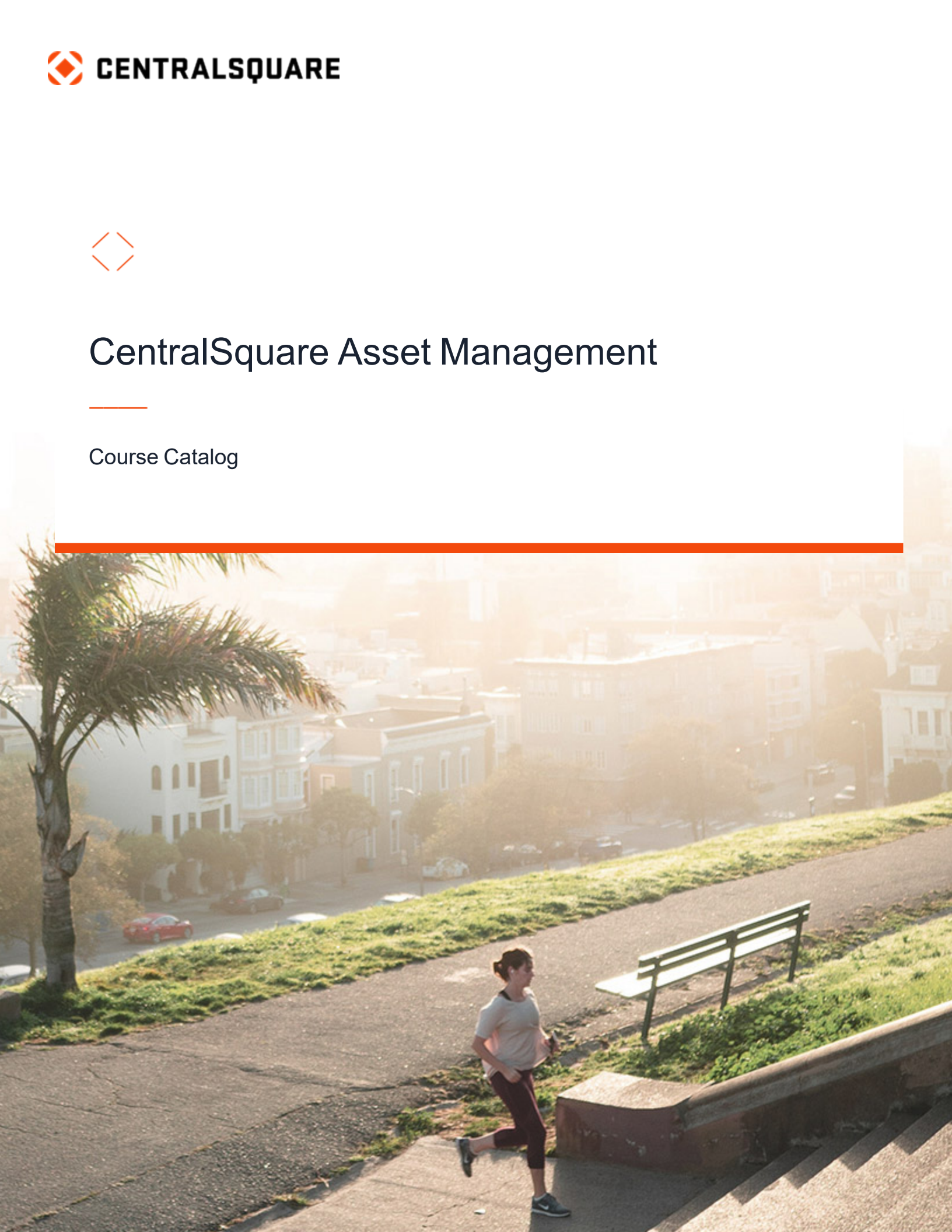




# CentralSquare Asset Management

Course Catalog



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Sept 23

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## Overview

### Desktop

**Description:** This program will discuss basic features in the desktop application of Enterprise Asset Management.

**Duration:** 20 minutes

Course/Description	Duration
<b>Basic Tools</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand the functionality of tools available to you on the desktop.</li></ul>	11 mins
<b>Basic Interface</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand and be able to utilize Module Tools such as Navigation, Work Order Forms and Tabs.</li></ul>	9 mins

### Enterprise Asset Management: Orientation for New Administrators

Course/Description	Duration
<b>Enterprise Asset Management: Orientation for New Administrators</b> <p>Effectively using the Enterprise Asset Management (EAM) software solution for your organization is best achieved by having a solid understanding of CentralSquare Technologies, our customer focus, and the EAM solution. EAM is primarily used to support municipal governments and in particular public works. This is an instructor-led learning event recorded in December 2022.</p>	88 mins

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## Enterprise Asset Management: Keys to a Successful Implementation

Course/Description	Duration
<b>Enterprise Asset Management: Keys to a Successful Implementation</b>  This video provides information about how you can best ensure that your implementation efforts are effective for Enterprise Asset Management (EAM). Topics discussed include key elements of a successful implementation project, team assimilation, change management, goal setting, training and launch planning, and ongoing improvement audits for your live Computerized Maintenance Management System (CMMS). This is an instructor-led learning event recorded in December 2022.	94 mins

### Web Overview

**Description:** This program will discuss basic features in the Web application of Enterprise Asset Management. More courses to come!

**Duration:** 14 minutes

Course/Description	Duration
<b>Basic Module Layout</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand the basic layout and functions of the web module.</li></ul>	8 mins
<b>Views, Grinds, and Forms</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand Views, Grids and Forms in Asset Management Web.</li></ul>	6 mins

## Web

### Dashboard

**Description:** This learning path will discuss features of the Web Dashboard in Enterprise Asset Management.

This learning path is applicable for Enterprise Asset Management 20.3 and higher.

Course/Description	Duration
<b>Tabs, Frames and Global Toolbar</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand Tabs, Frames and the Global Toolbar.</li></ul>	11 mins
<b>Global Toolbar and User Settings</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand additional functions of the Global Toolbar, as well as User Settings.</li></ul>	13 mins
<b>Plug-ins and Filters</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand Plug-ins and Filters for Asset Management Web.</li></ul>	9 mins
<b>Forms</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand the form toolbar. This includes: Refresh and Share, Add a Record, Save as well as Save and Close, Undo, Redo, Field Property and Carry Over.</li></ul>	13 mins
<b>Form Toolbar Layout</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand the general functions of Forms, Form Fields and Picklists.</li></ul>	11 mins

### Reporting

**Description:** This learning path will discuss features of Web Reporting in Enterprise Asset Management.

This learning path is applicable for Enterprise Asset Management 20.3 and higher.

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Course/Description	Duration
<b>Reporting Basics</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to access Reports, Filter and run a Report.</li></ul>	13 mins
<b>Advanced Filters and Quick Reports</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand advanced reporting, Quick Reports and reporting between modules.</li></ul>	12 mins
<b>Custom Reporting</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to run a custom report as well as how to Export and Edit the report.</li></ul>	9 mins

## Views

**Description:** This learning path will discuss views within Enterprise Asset Management.

This learning path is applicable for Enterprise Asset Management 20.3 and higher.

Course/Description	Duration
<b>Views</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand the structure of Views which includes Grids, Details, Tabs and Tasks.</li></ul>	9 mins
<b>Views Toolbar</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand advanced reporting, Quick Reports and reporting between modules.</li></ul>	28 mins
<b>Additional Views Toolbar Icons</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand the function of additional icons on the Views Toolbar. The icons you'll learn about today are ones that apply to more unique circumstances.</li></ul>	7 mins



## Admin Configuration

**Description:** Upon completion of this course, you'll understand the function of tools in the admin portal.

This course is applicable for Enterprise Asset Management 20.3 and higher.

Course/Description	Duration
<b>Portal and Tools</b> <ul style="list-style-type: none"><li>Upon completion of this module, you'll understand the function of tools in the admin portal.</li></ul>	21 mins
<b>Additional Portal Tools</b> <ul style="list-style-type: none"><li>Upon completion of this module, you'll understand the function of tools in the admin portal. This includes: Email, Tools, GIS Configuration, UI and Dashboard Management.</li></ul>	10 mins

## Work Requests

**Description:** Upon completion of this course, you'll understand how to create Work Requests.

This course is applicable for Enterprise Asset Management 20.3 and higher.

Course/Description	Duration
<b>Web - Creating Work Requests</b> <ul style="list-style-type: none"><li>Upon completion of this module, you'll understand how to create a Work Request.</li></ul>	12 mins
<b>Web - Creating Work Requests from the Map</b> <ul style="list-style-type: none"><li>Upon completion of this module, you'll understand how to create Work Requests from the Map.</li></ul>	15 mins

## Enterprise Asset Management: Web - Basic Preventative Maintenances and Work Templates

Course/Description	Duration
<b>Enterprise Asset Management: Web - Basic Preventative Maintenances and Work Templates</b> <ul style="list-style-type: none"><li>Upon completion of this course, you will understand basic Preventative Maintenance (PM).</li></ul>	16 mins

## Enterprise Asset Management: Web - Create a Work Order from Map

Course/Description	Duration
<b>Enterprise Asset Management: Web - Create a Work Order from Map</b> <ul style="list-style-type: none"><li>Upon completion of this course, you will understand how to create a Work Order from the Map.</li></ul>	13 mins

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### Enterprise Asset Management: Web - Create Work Order from Request

Course/Description	Duration
<b>Enterprise Asset Management: Web - Create Work Order from Request</b> <ul style="list-style-type: none"><li>• Upon completion of this course, you will understand how to create a Work Order from a Work Request.</li></ul>	7 mins

### Enterprise Asset Management: Web - Creating Work Requests from the Map

Course/Description	Duration
<b>Enterprise Asset Management: Web - Creating Work Requests from the Map</b> <ul style="list-style-type: none"><li>• Upon completion of this course, you will know how to create a work request from the map.</li></ul>	7 mins

### Enterprise Asset Management: Web – Work Order Checklists

Course/Description	Duration
<b>Enterprise Asset Management: Web – Work Order Checklists</b> <ul style="list-style-type: none"><li>• Upon completion of this course, you will understand how to create a checklist for a work order.</li></ul>	7 mins

## Mobile

### iOS

#### ***Dashboard and Tools Overview***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Dashboard and Tools Overview</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand Dashboard basics which include: Tabs, Plug-ins, Look-up, Toolbar, Views, Filter, Sort and Search. You'll also understand the Selection and Form toolbars.</li></ul>	24 mins

#### ***Work Requests***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Work Requests</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to create a Work Request using an iOS device as well as create a Fleet Management request.</li></ul>	10 mins

#### ***Map Work Requests***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Map Work Requests</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to create a Work Request from the Map using an iOS device.</li></ul>	7 mins

#### ***Process Work Orders***

This course is applicable for Enterprise Asset Management 2.0 and higher.

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Course/Description	Duration
<b>Process Work Orders</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to process a Work Order on an iOS device which includes creating Work Order Tasks and tracking Resources.</li></ul>	19 mins

### ***Map Work Orders***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Map Work Orders</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to create a Work Order from the Map using an iOS device.</li></ul>	7 mins

## **Android**

### ***Dashboard Layout and Tools***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Dashboard Layout and Tools</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand Dashboard basics, Work Orders, the Search feature along with other functionalities and the Toolbar.</li></ul>	20 mins

### ***Using the Map***

**Description:** Upon completion of this course, you'll understand Map basics, Map Configuration and the functionality of Map buttons.

**Duration:** 29 minutes

This course is applicable for Enterprise Asset Management 2.0 and higher.

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Course/Description	Duration
<b>Using the Map</b> <ul style="list-style-type: none"><li>Upon completion of this module, you'll understand Map basics, Map Configuration and the functionality of Map buttons.</li></ul>	14 mins
<b>Additional Map Functionalities</b> <ul style="list-style-type: none"><li>Upon completion of this module, you'll understand additional functionalities of the Map, Map Work Order tools and application settings.</li></ul>	15 mins

### ***Process Work Orders***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Process Work Orders</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to work with Tasks, add and edit Resources and finally complete a Work Order.</li></ul>	19 mins

### ***Create a Work Order from an Asset on the Map***

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Create a Work Order from an Asset on the Map</b> <ul style="list-style-type: none"><li>Upon completion of this course, you'll understand how to create a Work Order from an Asset on the Map using an Android device.</li></ul>	10 mins

### ***Work Requests***

This course is applicable for Enterprise Asset Management 2.0 and higher.

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Course/Description	Duration
<b>Work Requests</b> <ul style="list-style-type: none"><li>• Upon completion of this course, you'll understand how to create a Work Request using an Android.</li></ul>	9 mins

### *Creating Work Requests from the Map*

This course is applicable for Enterprise Asset Management 2.0 and higher.

Course/Description	Duration
<b>Creating Work Requests for the Map</b> <ul style="list-style-type: none"><li>• Upon completion of this course, you'll understand how to create a Work Request from the Map using an Android device.</li></ul>	6 mins

## Customer Presentations

### Enterprise Asset Management: Customer Presentation (City of Yuma, AZ) - Valve Turning and Leveraging Asset Classes

Course/Description	Duration
<p><b>Enterprise Asset Management: Customer Presentation (City of Yuma, AZ) - Valve Turning and Leveraging Asset Classes</b></p> <p>Bradley Steinbach from the City of Yuma, AZ accompanied by CentralSquare Technology product resources demonstrate his agency's use of Enterprise Asset Management (EAM) for managing valve turning with GIS and utilizing asset class functions. This is an instructor-led learning event recorded in January 2023.</p>	42 mins

### Enterprise Asset Management: Customer Presentation (Augusta County Service Authority, VA) - Import and Update, How Far Can We Push It

Course/Description	Duration
<p><b>Enterprise Asset Management: Customer Presentation (Augusta County Service Authority, VA) - Import and Update, How Far Can We Push It</b></p> <p>Casey McCracken from the Augusta County Service Authority, VA accompanied by CentralSquare Technology product resources demonstrate his agency's use of the Enterprise Asset Management (EAM) import and update function. Casey discusses his organization's specific configurations to address several demands of varying complexity.</p>	56 mins



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## Enterprise Asset Management: Customer Presentation (City of Pasadena, CA) - Effectively Managing Your Fleet and Transportation Assets

Course/Description	Duration
<p><b>Enterprise Asset Management: Customer Presentation (City of Pasadena, CA) - Effectively Managing Your Fleet and Transportation Assets</b></p> <p>Billy Wright from the City of Pasadena, CA accompanied by CentralSquare Technology product resources discuss their agency's use of Enterprise Asset Management (EAM) for managing fleet and transportation assets. This is an instructor-led learning event recorded in May 2023.</p>	40 mins

## Administrator

### Enterprise Asset Management: Security Management Overview

Course/Description	Duration
<p><b>Enterprise Asset Management: Security Management Overview</b></p> <p>The Enterprise Asset Management (EAM) security function allows your agency's system administrator to control access to EAM programs by defining permissions for certain functions within EAM. Security management, once handled in the Security.exe desktop app, is now managed in the Admin Portal. This video covers navigation of this new security configuration paradigm, discusses general approaches to security management, and reviews suggested best practices. This is an instructor-led learning event recorded in March 2023.</p>	55 mins

### Enterprise Asset Management: Admin Portal Overview

Course/Description	Duration
<p><b>Enterprise Asset Management: Admin Portal Overview</b></p> <p>The Enterprise Asset Management (EAM) admin portal enables administrators to view and modify various system-wide and administrative settings and enables administrators to execute certain functions across the EAM system. This video provides an overview of many elements found in the Admin Portal in the EAM Web app. This is an instructor-led learning event recorded in May 2023.</p>	66 mins

## Functional

### Enterprise Asset Management: Preventative Maintenance Template Overview

Course/Description	Duration
<p><b>Enterprise Asset Management: Preventative Maintenance Template Overview</b></p> <p>The Enterprise Asset Management (EAM) preventative maintenance function can be used for promptly and conducting regularly scheduled maintenance activities to help prevent unexpected failures. Preventative maintenance is a cornerstone of good asset management – proactively maintaining assets helps prevent disruptive and expensive failures. Managing preventative maintenance can be complex and approached in various ways. This video provides an overview the core functionality of the preventative maintenance module and reviews suggested best practices.</p>	121 mins

### Enterprise Asset Management: Admin Portal Overview

Course/Description	Duration
<p><b>Enterprise Asset Management: Admin Portal Overview</b></p> <p>The Enterprise Asset Management (EAM) admin portal enables administrators to view and modify various system-wide and administrative settings and enables administrators to execute certain functions across the EAM system. This video provides an overview of many elements found in the Admin Portal in the EAM Web app. This is an instructor-led learning event recorded in May 2023.</p>	66 mins

## Enterprise Asset Management: Asset Class - System / Assembly / Component

Course/Description	Duration
<p><b>Enterprise Asset Management: Asset Class - System / Assembly / Component</b></p> <p>The Enterprise Asset Management (EAM) asset class library allows you to differentiate types of assets within a single module, such as pumps versus motors both found in the Equipment module and enables you to categorize the equipment by class and then assign a list of components for each class. This video provides an overview of the class library, creating asset and inspection views with forms that are dictated by the asset class, so you can capture different attributes for each type of asset. Using the System / Assembly / Component (S/A/C) function gives you a quick and accurate way to define the specific component of an asset being worked on individual Work Tasks. This is an instructor-led learning event recorded in January 2023.</p>	46 mins

## Enterprise Asset Management: Inventory Management Overview

Course/Description	Duration
<p><b>Enterprise Asset Management: Inventory Management Overview</b></p> <p>The Enterprise Asset Management (EAM) module allows you to track warehouse locations and parts inventory and create purchase orders and document order fulfillment. This video provides an overview of the warehousing and parts module. This is an instructor-led learning event recorded in January 2023.</p>	44 mins

## Enterprise Asset Management: ArcGIS Pro Add In Overview

Course/Description	Duration
<b>Enterprise Asset Management: ArcGIS Pro Add In Overview</b> <p>The Enterprise Asset Management (EAM) add-in for ArcGIS Pro integrates EAM and Esri's newest desktop platform for viewing, editing, and managing your GIS data. The tools in the EAM ArcGIS Pro add-in work with data added directly from a geodatabase or via map or feature services. This video provides information about the full suite of functionality for administrating and managing your GIS integration to edit and analysis tools it provides.</p>	46 mins

## Enterprise Asset Management: Pavement Management Overview

Course/Description	Duration
<b>Enterprise Asset Management: Pavement Management Overview</b> <p>Enterprise Asset Management (EAM) pavement management modeling function allows you to forecast pavement degradation and models the application of remedial maintenance to optimally extend the lifespan of your road network. Through this function, you can maximize the return on your maintenance budget, or you can determine the minimum budget necessary to achieve an overall condition score. This video provides an overview of the model's elements and insight from CentralSquare Technologies' resident pavement expert.</p>	78 mins

## Enterprise Asset Management: Overview of the Import and Update Tool and Sample Uses

Course/Description	Duration
<b>Enterprise Asset Management: Overview of the Import and Update Tool and Sample Uses</b> <p>The Enterprise Asset Management (EAM) import and update tool allows you to import and update data in EAM. The tool is designed to import data sets from an external source, import multiple data sets from an outside source, update records in EAM tables, build scheduled processes, and build sophisticated integrations with external systems. This video provides an overview of this functionality, points you to in depth resources, and showcases some of the many uses for the tool. This is an instructor-led learning event recorded in September 2022.</p>	62 mins

## Enterprise Asset Management: Group Assignments for Views, Forms, and Toolkits

Course/Description	Duration
<b>Enterprise Asset Management: Group Assignments for Views, Forms, and Toolkits</b> <p>The Enterprise Asset Management (EAM) group assignment function enables administrators to assign toolkits to groups, view to groups, forms to groups, and set default views to groups. This video covers the limit toolkit function, and group assignments in the Admin Portal. This is an instructor-led learning event recorded in June 2022.</p>	24 mins

## Enterprise Asset Management: Leveraging the Module Spatial Tool

Course/Description	Duration
<p><b>Enterprise Asset Management: Leveraging the Module Spatial Tool</b></p> <p>The Enterprise Asset Management (EAM) Module Spatial tool lets you map things that are not automatically spatial, such as work orders and inspections. These things become mappable through their association to assets, addresses, or coordinates. This learning event provides information about configuration, tools, and use cases as it relates to the Module Spatial Tool. This is an instructor-led learning event recorded in May 2022.</p>	64 mins

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## Cross Product Topics

### Getting Started with CentralSquare University (CSU)

Course/Description	Duration
<b>Getting Started with CentralSquare University (CSU)</b> <p>CentralSquare University (CSU) is an online learning portal where you can register for live, instructor-led courses and access self-paced, eLearning courses. The self-paced, eLearning courses are also referred to as on-demand, eLearning courses since they are available 24 hours a day, 7 days a week. Upon completion of this course, you will be able to log on to CSU, access assigned courses, and contact the CSU support team.</p>	4 mins



## Getting the Most Out of Your CentralSquare Customer Portal

Course/Description	Duration
<p data-bbox="191 426 1036 457"><b>Getting the Most Out of Your CentralSquare Customer Portal</b></p> <p data-bbox="191 485 1040 659">CentralSquare Customer Portal provides access to resources including an extensive knowledge base, a user community, access to software updates for selected CentralSquare products, and the ability to interact with CentralSquare Support and other teams. Some examples of what you can do in the portal include:</p> <ul data-bbox="201 688 1036 1163" style="list-style-type: none"><li data-bbox="201 688 691 720">• Entering and tracking support cases</li><li data-bbox="201 747 1036 816">• Searching the knowledgebase for customer and CentralSquare employee generated information</li><li data-bbox="201 844 928 913">• Locating information about your product line or specific applications</li><li data-bbox="201 940 1027 1010">• Accessing various help and informational documents including release notes and artifacts</li><li data-bbox="201 1037 980 1106">• Communicating/Posting messages from product users and CentralSquare employees</li><li data-bbox="201 1134 789 1165">• Working with discreet member communities</li></ul> <p data-bbox="191 1192 1032 1360">CentralSquare directors Joe Kugler and Sandy Bellamy from the knowledge management and support team provide an overview, demonstration, and suggested techniques for effectively using the customer portal. This instructor-led session was conducted in July 2023.</p>	<p data-bbox="1073 426 1247 457">1 hour 7 mins</p>

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## Introduction to CentralSquare University (CSU)

Course/Description	Duration
<p><b>Introduction to CentralSquare University (CSU)</b></p> <p>You may know how to access CentralSquare University (CSU), but do you know how to track your learning progress, enroll yourself in courses of your choosing, and register for live sessions? This interactive course teaches you about some of CSU's lesser-known features. The aim of this course is to prepare you to have richer learning experiences.</p>	8 mins