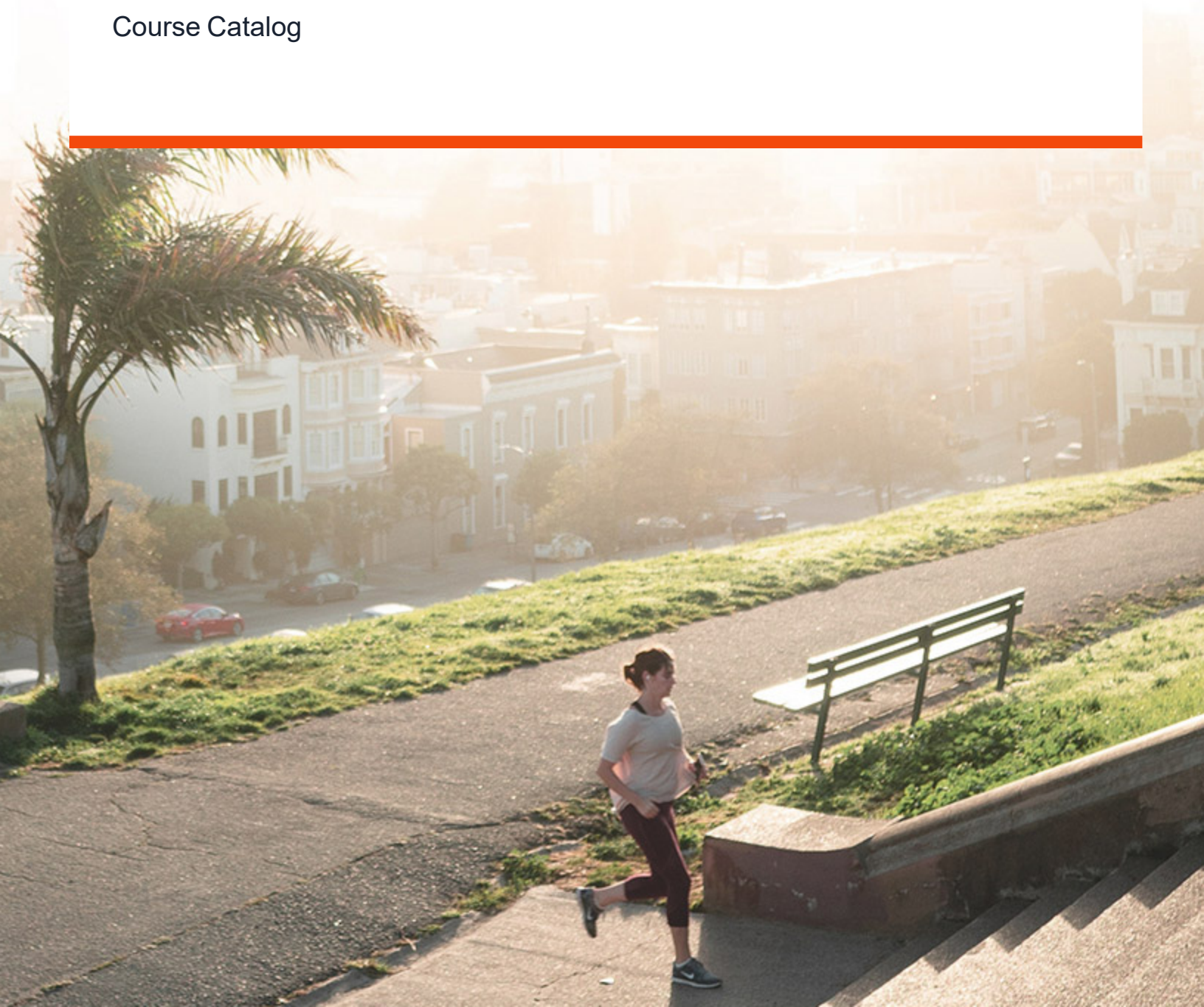
CENTRALSQUARE

Community Development

Course Catalog



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Sept 23

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Workspaces

Inspection Center

This course is applicable for Community Development 18.1.

Course/Description	Duration
Inspection Center • This course will demonstrate how to add the Inspection Center to the Workspace, sort inspections, reassign inspectors, and use icons & tools.	13 mins

Workspaces Learning Path

Description: Upon completion of this learning path, you will learn basic navigation, tools, and how to configure user options.

Duration: 1 hour 29 minutes

This learning path is applicable for Community Development 19.3.7.

Course/Description	Duration
Basic Navigation and Tools • Upon completion of this course, you will know how to use the history, help, and some module tools. You will also know how to navigate the panes within a module.	25 mins
User Options • Upon completion of this course, you will know how to configure the User Options for Workspaces.	17 mins
Widgets • Upon completion of this course, you will know how to use the widgets in Workspaces.	47 mins

Reporting

Advanced Reporting

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Advanced Reporting • Upon completion of this course, you will learn how to create reports from the Favorites or Workspaces.	13 mins

SSRS Reporting

Description: Upon completion of this course, you'll understand how to complete SSRS report. You'll be able to prepare a data source and data set for a report, then add the data to the report and format it.

Duration: 42 minutes

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Adding a Data Source and Data Set • Upon completion of this module, you'll understand how to get started on a report by adding a Data Source and a Data Set.	14 mins
Add Data to a Report and Formatting • Upon completion of this module, you'll understand how to add data to a report and format it.	28 mins

GIS

Basic GIS

Description: Upon completion of this learning path, you will learn about basic GIS features.

Duration: 26 minutes

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Tools Overview • Upon completion of this course, you'll understand how to use navigation, measurement, and viewing features. You'll also understand several tools to help you along the way such as Sketch Tools, Record Symbology, Bookmarks, Geocode, Plot Inspections, Clear Graphics, Advanced GIS Search and Print.	22 mins
Selection Features • Upon completion of this course, you'll understand how to use the Selection Features, which includes the Single Select Tool, Selection Results, the Multi Select Tool, and Multi Selection Results.	16 mins

Permitting

Bonds

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Bonds • Upon completion of this course, you will be able to complete the following bonds functionality: Create a bond, add details to a bond, pay a bond, unpay a bond, delete a bond, reducing a bond, and releasing a bond.	15 mins

Introduction to PermitTRAK for Permit Management and Inspections Coordination

This course is applicable for Community Development 18.1.

Course/Description	Duration
Introduction to PermitTRAK for Permit Management and Inspections Coordination • This course provides information about the features of the PermitTRAK module and how to integrate your local business processes.	1 hour 33 mins

Permit Statuses

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Global and Type Specific Permit Statuses • Upon completion of this course, you'll understand how to create Statuses at a Global and Type Specific Level, copy Status Codes from one Permit Type to another, and use Statuses to trigger changes on CRM Issues Statuses.	6 mins

Permitting

Description: Upon completion of this learning path, you will learn about Permitting in Community Development.

Duration: 1 hour 21 minutes

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Documents, Report and Attachments • Upon completion of this course, you'll understand how to utilize Print functions, manage Attachments and pull Reports.	14 mins
Inspection Books • Upon completion of this course, you'll understand how to Add and Result inspections, Sequence and Schedule inspections, make inspections final as well as view reports.	24 mins
Inspections in Workspace • Upon completion of this course, you'll understand how to Sort, Reassign and Edit Inspections, as well as understand general functionalities in Workspace.	9 mins
Review Books • Upon completion of this course, you'll understand how to Add and Result a Review, complete Checklists and Standard Notes, complete Revisions, as well as generate documents.	24 mins
Review Books in Workspace • Upon completion of this course, you'll understand how to utilize the Review Center in Workspace which includes: Settings, Editing, adding Attachments, as well as accessing a record.	10 mins

PermitTRAK Program

Description: This learning path provides an introduction to PermitTRAK.

Duration: 1 hour 12 minutes

This course is applicable for Community Development 18.1.

Course/Description	Duration
Summary Pane • Let's explore the Summary Pane within PermitTRAK.	20 mins
Contacts, Valuations, Financial Information, & Conditions • In this course, we will be exploring the Contacts, Valuations, Financial Information, and Conditions Panes.	22 mins
Reviews, Chronology & Custom Screens, Bonds, & Printing • Let's learn about the Inspections, Reviews, Chronology & Custom Screens, Bonds, and Printing options.	30 mins

Project and Planning

Creating, Unlinking, and Resulting

This course is applicable for Community Development 18.1.

Course/Description	Duration
ProjectTRAK: Creating, Unlinking & Resulting • This course will teach you how to create a new project, unlink a project from a record, and result a review.	16 mins

Introduction to ProjectTRAK for Planners and Engineers

This course is applicable for Community Development 18.1.

Course/Description	Duration
Introduction to ProjectTRAK for Planners and Engineers • This course reviews the features of the ProjectTRAK module and how to integrate it into your local development processes.	1 hour 5 mins

Overview

This course is applicable for Community Development 18.1.

Course/Description	Duration
ProjectTRAK: Overview • This course will serve as an overview of ProjectTRAK.	14 mins

Bonds

Course/Description	Duration
Bonds • Upon completion of this course, you will be able to complete the following bonds functionality: Create a bond, add details to a bond, pay a bond, unpay a bond, delete a bond, reducing a bond, and releasing a bond.	15 mins

LicenseTRAK

Advanced License Processing (ALP)

Description: This program will explore the basics of Advanced License Processing (ALP).

Duration: 1 hour 54 minutes

This course is applicable for Community Development 18.1.

Course/Description	Duration
Renewal Periods & Adding Parameter Sets to Licenses • Discover information about renewal periods, as well as how to add parameter sets to licenses for renewal.	18 mins
Parameter Sets • Explore the different parameter sets available and how to best configure them.	24 mins
Parameter Sets Cont'd • Discover additional information about parameter sets, including conditional sets.	19 mins
Fee Assessment Rules & Building Advanced Searches • Learn about fee assessment rules, as well as how to build advanced searches in ALP.	19 mins
Running ALP · In this course, let's learn how to run Advanced License Processing.	17 mins
Assessment	17 mins

Transaction Manager

Transaction Manager

Description: Upon completion of this learning path, you will learn about the Transaction Manager within Community Development.

Duration: 17 minutes

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Community Development Changes • By completing this course, you will know how to add the Transaction Manager to your Favorites, post a transaction, void a transaction, and override the status of a transaction.	10 mins
Web Utilities and Maintenance (WUM) Changes • By completing this course, you will be able to configure the Accounting settings, set up the online portal payment gateways, and modify User Privileges as they relate to taking and processing fees.	7 mins

WUM and Permitting

WUM and Permitting Program

Description: This program will guide you through the WUM and permitting.

Duration: 1 hour 22 minutes

This course is applicable for Community Development 19.3.7.

Course/Description	Duration
Setting Up Inspections, Groups, and Sequencing • Let's learn how to create Inspection Types, add Inspection Types to Groups, and set up the Sequencing of Auto Inspections for a Permit Type.	13 mins
Setting Up Inspection Checklists • Let's learn how to create a Check List, set up Checklist Rules, and use a Check List.	10 mins
Review Types and Review Groups • Let's learn how to create a Review Type, set up automation for Reviews, and use Review Groups.	10 mins
Permit Types and Subtypes • Let's learn how to create a Permit Type and add a Subtype.	13 mins
The Permit Life Cycle and Overall Automation • Upon completion of this course, you will know how to set up Automation on the Module and Type level and configure an additional date.	15 mins
Permit Chronology and Event Scheduler • Upon completion of this course, you will learn how to set up and use Chronology and the Event Scheduler for Community Development.	12 mins
Inspection Settings • In this course, you will learn how to set up Inspections Settings and use Inspections Caps.	9 mins

Citizen Response Management (CRM)

Intake and Workflow

This course is applicable to versions 19.3.7 and above.

Course/Description	Duration
Intake and Workflow • Upon completion of this course, you will know how to intake an Issue in the CRM Module, process Issues, and monitor issues.	15 mins

Land Management

Overview

This course is applicable for Community Development 18.1.

Course/Description	Duration
GeoTRAK • In this course, we will explore the various options available in GeoTRAK.	23 mins

CodeTRAK

Code Enforcement

Description: Dive into the Code Enforcement area of CodeTRAK within Community Development.

Duration: 58 minutes

This course is applicable for Community Development 18.1.

Course/Description	Duration
Overview • Let's learn the basics of CodeTRAK, as well as how to link to a GeoTRAK record.	15 mins
Violations • Discover how to add violations, satisfy violations, and how to print a notice.	17 mins
Resulting Cases & Handling Fees • In this course, you will learn how to result code enforcement cases, as well as how to handle fees.	14 mins
Assessment	12 mins

AECTRAK

AECTRAK Records

This course is applicable for Community Development 18.1.

Course/Description	Duration
AECTrak Records: Searching, Sorting, Editing & Creating • This course will demonstrate how to search, sort, edit, and create AEC records.	18 mins

Mobiles

iTRAKiT Inspections

This course is applicable for Community Development 18.1.

Course/Description	Duration
Near Me Functionality, Scheduling, & Resulting Inspections • This course will discuss how to activate the Near Me (map) functionality to select records, as well as scheduling new inspections and resulting them.	14 mins

iTRAKiT Code

Description: This program provides an introduction to ITRAKiT Code.

Duration: 1 hour 58 minutes

This course is applicable for Community Development 18.1.

Course/Description	Duration
Introduction – Part 1 • In this course, we will explore navigation, how to log-in, mobile inspections, the map, and how to prioritize inspections.	20 mins
Introduction – Part 2 • Let's browse the tabs and remaining options available in iTRAKiT Code.	23 mins
My Cases & Add Case • Dive into the My Cases and Add Case options in iTRAKiT Code.	20 mins
Near Me, Result Inspection, & Schedule Inspection • Explore the various options: Near Me, Result Inspection, and Schedule Inspection.	25 mins
Assessment	30 mins

eTRAKiT

eTRAKiT

Note: The below courses are not in a program; they are separate courses.

This course is applicable for Community Development 18.1.

Course/Description	Duration
Searching • In this course, you will discover how to run a variety of searches within eTRAKiT.	20 mins
Apply for a Permit • Learn the four steps required to apply for a permit in eTRAKiT.	15 mins
Apply for a Project • Learn the four steps required to apply for a project in eTRAKiT.	11 mins

Cross Product Topics

Getting Started with CentralSquare University (CSU)

Course/Description	Duration
Getting Started with CentralSquare University (CSU) 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.	4 mins

Getting the Most Out of Your CentralSquare Customer Portal

Course/Description	Duration
Getting the Most Out of Your CentralSquare Customer Portal 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: • Entering and tracking support cases • Searching the knowledgebase for customer and CentralSquare employee generated information • Locating information about your product line or specific applications • Accessing various help and informational documents including release notes and artifacts • Communicating/Posting messages from product users and CentralSquare employees • Working with discreet member communities 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.	1 hour 7 mins

Introduction to CentralSquare University (CSU)

Course/Description	Duration
Introduction to CentralSquare University (CSU) 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.	8 mins

Community Development Customer Presentation (City of Westminster, CO) - Project and Planning Workflow

Course/Description	Duration
Introduction to CentralSquare University (CSU) Katie Curry and Genevieve Pizinger from Westminster, CO accompanied by CentralSquare Technology product resource demonstrate their use and implementation of Community Development import and how the solution has helped their organization efficiency.	1 hour 19 mins