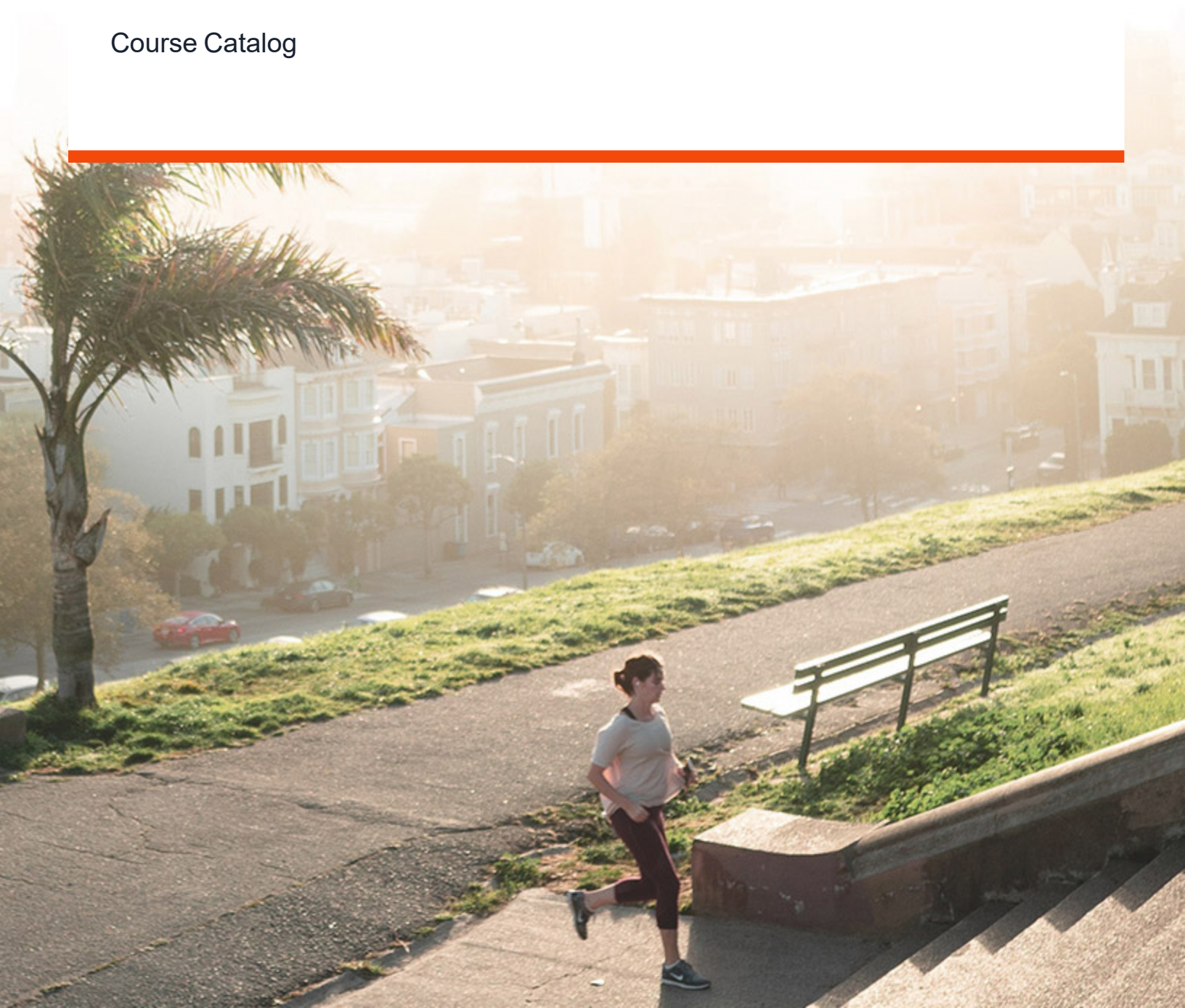




NaviLine

Course Catalog



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Overview

Overview HTML5

Description: This program will provide an overview of the various applications within NaviLine HTML5!

Duration: 43 minutes

Course/Description	Duration
Fiscal Services & Human Resources <ul style="list-style-type: none">Explore the Fiscal Services and Human Resources applications in NaviLine HTML5.	29 mins
Community Service <ul style="list-style-type: none">In this course, you'll learn to navigate the Community Service application in NaviLine HTML5.	20 mins
Utilities & System Administration <ul style="list-style-type: none">In this course, you'll learn to navigate the Utilities and System Administration applications in NaviLine HTML5.	15 mins

Basics HTML5

Description: This program will explore basic navigation, searching, new functionality, and more!

Duration: 28 minutes

Course/Description	Duration
Basics <ul style="list-style-type: none">Learn the basics of how to navigate NaviLine HTML5.	22 mins
What's New <ul style="list-style-type: none">See what's new in the NaviLine 18.2 User Interface.	6 mins

Building Permits (BP) Courses

Building Permits (BP) 18.2 Program

Description: Learn the functions of the Building Permits Community Service Application.

Duration: 43 minutes

Course/Description	Duration
BP – Navigation & Adding an Application, Structure, & Permit Record <ul style="list-style-type: none">In this course, you will learn about BP navigation, as well as how to add an Application, Structure, and Permit Record.	22 mins
BP – Application, Structure, & Permit Records: Changing & Viewing Details <ul style="list-style-type: none">Learn how to change and view details for the following records: Application, Structure, and Permit.	21 mins

Building Permits Application and Permit Fees

Course/Description	Duration
Building Permits Application and Permit Fees <ul style="list-style-type: none">This course provides information about building permit application and permit fees that can be processed while using the software.	27 mins

Building Permits Overview

Course/Description	Duration
Building Permits Overview <ul style="list-style-type: none">This course provides an overview of how Building Permits works and how other CentralSquare software applications interface with BP.	43 mins

Corrective Actions for Common Errors in Building Permits

Course/Description	Duration
Corrective Actions for Common Errors in Building Permits <ul style="list-style-type: none">This course provides information about correcting, reversing, and changing data errors resulting from common processes performed in Building Permits.	15 mins

Expired Permit Tracking and Document Processing

Course/Description	Duration
Expired Permit Tracking and Document Processing <ul style="list-style-type: none">This course provides detailed information about using Building Permits to maintain and facilitate tasks related to working with expired permits and application documents.	40 mins

Getting the Most Out of Your Inspection Setup

Course/Description	Duration
Getting the Most Out of Your Inspection Setup <ul style="list-style-type: none">This course will explain how all the pieces of Inspection setup work and interact, how to utilize points, how to setup default inspections, and how to process inspections in the Building Permit Application.	45 mins

Getting the Most Out of Your Inspection Setup

Course/Description	Duration
Getting the Most Out of Your Inspection Setup <ul style="list-style-type: none">This course will explain how all the pieces of Inspection setup work and interact, how to utilize points, how to setup default inspections, and how to process inspections in the Building Permit Application.	45 mins

Understanding Mobile Inspections for Building Permits

Course/Description	Duration
Understanding Mobile Inspections for Building Permits <ul style="list-style-type: none">• This course provides information on the mobile inspections application.	17 mins

Understanding the Plan Review Process You Set up in Building Permits

Course/Description	Duration
Understanding the Plan Review Process You Set up in Building Permits <ul style="list-style-type: none">• This course provides information about the plan review process and workflow.	45 mins

Working With Custom Calculations in Building Permits

Course/Description	Duration
Working With Custom Calculations in Building Permits <ul style="list-style-type: none">• This course provides an introduction into setting up customized calculations.	30 mins

Business Licenses (BL)

Business Licenses (BL) 18.2 Program

Description: Learn the functions of the Business Licenses Community Service Application.

Duration: 50 minutes

Course/Description	Duration
BL: Navigation & Adding BL Records <ul style="list-style-type: none">Learn how to navigate within the BL software application and how to add a Business License Record.	27 mins
BL Records: Changing & Viewing Details <ul style="list-style-type: none">In this course, you will learn how to change a Business and License Record, as well as how to view Business and License Record Details.	23 mins

Integrating Business Licensing with Generic Inspections

Course/Description	Duration
Integrating Business Licensing with Generic Inspections <ul style="list-style-type: none">This course provides an overview of setting up Business Licenses to interface with Code Enforcement's generic inspections.	48 mins

Introduction to Business Licenses Code Setup

Course/Description	Duration
Introduction to Business Licenses Code Setup <ul style="list-style-type: none">This course provides overview information about Business Licenses and introduces information about system control options, license reviews, and demand reports.	1 hr 20 mins

Understanding How Business Licenses Works With GMBA and INFISYS

Course/Description	Duration
Understanding How Business Licenses Works With GMBA and INFISYS <ul style="list-style-type: none">• This course provides information about setting up the proper account numbers for business licenses and identifying balancing issues.	40 mins

Using DMS to Print Licenses and Documents in Business Licenses

Course/Description	Duration
Using DMS to Print Licenses and Documents in Business Licenses <ul style="list-style-type: none">• This course provides information about how to use DMS to produce a variety of notices including renewals, license prints, and zoning notifications.	34 mins

Code Enforcement (CE)

Code Enforcement (CE) 18.2

Course/Description	Duration
CE – Navigation & Case Records <ul style="list-style-type: none">In this course, you will learn about CE navigation, as well as how to add, change, and view details about Case Records.	30 mins

Code Enforcement Overview

Course/Description	Duration
Code Enforcement Overview <ul style="list-style-type: none">This course provides an introduction to Code Enforcement (CE), such as focusing on terminology, application concepts, basic processing functions, operating procedures used by city and county code enforcement departments, and how you can use CE to accomplish ordinance requirements.	17 mins

Gaining Efficiency by Streamlining Your Tasks in Code Enforcement

Course/Description	Duration
Gaining Efficiency by Streamlining Your Tasks in Code Enforcement <ul style="list-style-type: none">This course provides information about code configuration, application processing, case types, and reporting from the perspective of streamlining your use of CE.	50 mins

Using DMS to Create Notices in Code Enforcement

Course/Description	Duration
Using DMS to Create Notices in Code Enforcement <ul style="list-style-type: none">• This course provides information about configuring codes and system rules for notice processing, setting up notices, processing notices, and printing notices.	22 mins

Customer Information Systems (CIS)

Active Delinquency

Description: This learning path focuses on the delinquency and payment processing within Customer Information Systems.

Duration: 1 hour 52 minutes

Course/Description	Duration
Active Delinquency Processing in Customer Information Systems <ul style="list-style-type: none">Upon completion of this course, you will be able to use CIS to manage delinquent active customer accounts.	28 mins
Final Delinquency Processing in the Customer Information System <ul style="list-style-type: none">This course provides information about using Customer Information System to manage delinquent final billed customer accounts.	40 mins
Working with Customer Payment Plans in Customer Information System <ul style="list-style-type: none">This course provides information about setting up, initiating, and maintaining a payment plan for a delinquent customer account and reporting options about payment plans.	44 mins

Budget Billing

Description: This learning path focuses on the budget billing process within Customer Information Systems.

Duration: 2 hours

Course/Description	Duration
Advanced Budget Billing Practices in Customer Information System <ul style="list-style-type: none">This course provides information on maximizing the use of the budget billing feature in Customer Information System.	40 mins

Course/Description	Duration
Introduction to Budget Billing in Customer Information System <ul style="list-style-type: none"> This course provides information on initiating budget billing and introductory information on using budget billing effectively within your organization. 	40 mins
Transactions and Budget Billing in Customer Information System <ul style="list-style-type: none"> This course provides information about budget billing and various transactions within Customer Information System. 	40 mins

Customer Information System Support Cases/Resolutions: Auto Pay Overrides, e-Notices, and Reports

Course/Description	Duration
Customer Information System Support Cases/Resolutions: Auto Pay Overrides, e-Notices, and Reports <ul style="list-style-type: none"> This course reviews the areas in Customer Information System (CIS) where the most CIS support cases were generated including online documentation, auto pay override levels, e-Notifications, force bill comments, service sequence inactivation, and termination thru date. 	40 mins

Customer Inquiry 18.2

Description: This program focuses on the Customer Inquiry Menu within Customer Information Systems.

Duration: 45 minutes

Course/Description	Duration
Customer and Location Master Files <ul style="list-style-type: none"> Explore the Customer Master File Inquiry, Location Master File, Location Services, and other options available on the Customer Inquiry Menu. 	26 mins

Course/Description	Duration
Menu Screens <ul style="list-style-type: none"> Discover information about Accounts Receivable, Consumption History, Customer At-a-Glance, and various screens available on the Customer Inquiry Menu. 	19 mins

Customer Maintenance 18.2

Description: This program focuses on the Customer Maintenance functions within the NaviLine software application.

Duration: 35 minutes

Course/Description	Duration
Adding a New Customer Record and Setting Up Services <ul style="list-style-type: none"> Learn how to add a new customer record, as well as set up services for the customer. 	21 mins
Linking a Customer, Location and Services <ul style="list-style-type: none"> In this course, learn how to put a customer, location, and services together. 	14 mins

Deposits 18.2

Description: This program focuses on working with deposits within NaviLine's Customer Information Systems.

Duration: 46 minutes

Course/Description	Duration
Utility Service <ul style="list-style-type: none"> Explore information related to Utility Service deposits in NaviLine. 	25 mins
Cash Receipts Process and Key Deposit Reports <ul style="list-style-type: none"> Examine the cash receipts process, as well as take a look at a handful of key reports. 	21 mins

Email Notifications for Bills in Customer Information System

Course/Description	Duration
Email Notifications for Bills in Customer Information System <ul style="list-style-type: none">This course provides information about how to set up and use the e-mail notification feature in Customer Information System.	23 mins

Interdepartmental Billing in Customer Information Systems Overview

Course/Description	Duration
Interdepartmental Billing in Customer Information Systems Overview <ul style="list-style-type: none">Upon completion of this course, you will learn about the IDB process, have guidance on setting up IDB processing, as well as how to interpret and analyze the reports associated with IDB processing.	29 mins

Metered Rates 18.2

Course/Description	Duration
Metered Rates 18.2 <ul style="list-style-type: none">Explore the Metered Rates option within the Utility Billing application.	25 mins

Overview of Customer Information Systems

Course/Description	Duration
Overview of Customer Information Systems <ul style="list-style-type: none">Upon completion of this course, you will learn about Customer Information Systems, as well as how CIS integrates with other CentralSquare software applications.	26 mins

Suggested Daily Processing Practices Using the Customer Information System

Course/Description	Duration
Suggested Daily Processing Practices Using the Customer Information System <ul style="list-style-type: none">This course provides information about using various Customer Information System features that may provide more task efficiency.	40 mins

Understanding Cycle Billing in Customer Information System

Course/Description	Duration
Understanding Cycle Billing in Customer Information System <ul style="list-style-type: none">This course provides overview information about the cycle billing process and how to manage off-cycle billing as part of the cycle billing process.	40 mins

Working with Customer Maintenance Functions in Customer Information Systems

Course/Description	Duration
Working with Customer Maintenance Functions in Customer Information Systems <ul style="list-style-type: none">Upon completion of this course, you will learn about customer and location services maintenance functions.	44 mins

Document Management Systems (DMS)

DMS Installation & Implementation Overview

Course/Description	Duration
DMS Installation & Implementation Overview <ul style="list-style-type: none">• Upon completion of this course, you will learn about DMS architecture, functionality, and detailed information on the DMS installation and configuration.	45 mins

Fiscal Services

Cash Receipts

Description: This program provides an orientation to Cash Receipts within the Fiscal Services application of NaviLine.

Duration: 2 hours 21 minutes

Course/Description	Duration
Part 1 – Key Terms <ul style="list-style-type: none"> Explore the Batch Type, Tender Method, and Payment Type Codes. These key terms will be beneficial when working in Cash Receipts. 	30 mins
Part 2 – Payment Processing <ul style="list-style-type: none"> In this course, we will review how to enter, process, edit, and review payments in Cash Receipts. 	30 mins
Part 3 – Batch Processing <ul style="list-style-type: none"> This course will cover how to edit, delete, balance, and post in the Cash Receipts application. 	15 mins
Part 4 – Reversing a Payment <ul style="list-style-type: none"> Discover how to enter, review, edit, and post reversals in the Cash Receipts application. 	15 mins
Part 5 – Searching for a Payment <ul style="list-style-type: none"> Now that the cash receipts are entered, let's explore the ways to review and search for payments. 	16 mins
Part 6 – Receipt Printer <ul style="list-style-type: none"> Let's explore how to setup the receipt printer. 	15 mins
Assessment	20 mins

Government Management & Budgetary Accounting (GMBA)

Government Management & Budgetary Accounting (GMBA)

GMBA Budgeting Overview

Course/Description	Duration
GMBA Budgeting Overview <ul style="list-style-type: none"> Upon completion of this course, you will learn about budgeting in GMBA and how you may be asked to participate in the process for your organization. 	17 mins

GMBA Fiscal Year End

Description: Upon completion of this learning path, you will learn about fiscal year end for GMBA.

Duration: 2 hours 9 minutes

Course/Description	Duration
Accounts Payable <ul style="list-style-type: none"> Upon completion of this course, you will learn about the disbursement processing aspects of fiscal year end processing. 	38 mins
GMBA Fiscal Year End: Creating Accounts for the Next Fiscal Year <ul style="list-style-type: none"> Upon completion of this course, you will learn the processing options available to create accounts for the next fiscal year end and the balance sheet rollover process in GMBA. 	33 mins
GMBA Fiscal Year End: Encumbrance Rollover <ul style="list-style-type: none"> Upon completion of this course, you will learn the processes that must be considered or steps that need to be addressed to prepare for year-end processing. 	31 mins
GMBA Fiscal Year End: Projects <ul style="list-style-type: none"> Upon completion of this course, you will learn the project accounting aspects of fiscal year end processing. 	27 mins

GMBA Software Application Overview

Course/Description	Duration
GMBA Software Application Overview <ul style="list-style-type: none">• Upon completion of this course, you will learn an overview of GMBA and its functions and features.	32 mins

Understanding Budgeting in GMBA

Course/Description	Duration
Understanding Budgeting in GMBA <ul style="list-style-type: none">• This course provides information about preparing a budget in GMBA and how it can be beneficial to your organization.	1 hour 17 mins

Understanding the Drill Down Feature in GMBA

Course/Description	Duration
Understanding the Drill Down Feature in GMBA <ul style="list-style-type: none">• Upon completion of this course, you will learn how the drill down feature works and how it can benefit your organization.	27 mins

Understanding Inquiry Functions in GMBA

Course/Description	Duration
Understanding Inquiry Functions in GMBA <ul style="list-style-type: none">• Upon completion of this course, you will learn the ways you can inquire on data and the ways you can view the data within GMBA.	32 mins

Land/Parcel Management (LX)

Data Maintenance in Land/Parcel Management

Course/Description	Duration
Data Maintenance in Land/Parcel Management <ul style="list-style-type: none">This course provides information about maintaining accurate and consistent data in Land/Parcel Management.	44 mins

Land/Parcel Management (LX) 18.2

Description: Learn the functions of the Land/Parcel Management Community Service application.

Duration: 51 minutes

Course/Description	Duration
LX - Navigation <ul style="list-style-type: none">In this course, you will learn about the various LX navigation functions and techniques.	30 mins
LX - Location Records <ul style="list-style-type: none">Learn how to add a Main Parcel Location Record, a Sub-Parcel Location Record, as well as how to view Location Record details.	21 mins

Understanding the Options for Working With a Record in Land/Parcel Management

Course/Description	Duration
Understanding the Options for Working With a Record in Land/Parcel Management <ul style="list-style-type: none">This course provides information about addresses, parcels, and locations options available during individual location record inquiry and maintenance in Land/Parcel Management.	53 mins

Working with Parcels in Land/Parcel Management

Course/Description	Duration
Working with Parcels in Land/Parcel Management <ul style="list-style-type: none">• This course provides detailed instructions on how to use the "parcel activity" feature for splits and combines, location mass additions, location mass changes, and parcel mass additions.	38 mins

Payroll & Personnel

Attaching Codes to Employees 18.2

Course/Description	Duration
Attaching Codes to Employees <ul style="list-style-type: none"> Discover how to attach payroll codes to employees. 	19 mins

Code Setup 18.2

Description: This learning path will provide information on setting up various codes for Payroll and Personnel in NaviLine.

Duration: 2 hours 41 minutes

Course/Description	Duration
Additional Pay Codes – Part 1 <ul style="list-style-type: none"> Familiarize yourself with the Additional Pay Code Screen layout, the options available to you, and information about the fields included while entering or changing an existing Pay Code. 	20 mins
Additional Pay Codes – Part 2 <ul style="list-style-type: none"> In this course, we will look at copying a pay code, setting frequencies, how to print a list, and how to export data. 	16 mins
ABT's <ul style="list-style-type: none"> Explore the Adjustments Before Tax screen. 	30 mins
Accruals <ul style="list-style-type: none"> Let's explore the Accrual Code Setup menu. 	30 mins
Benefits <ul style="list-style-type: none"> In this course, we will look at the Benefit Code Setup menu. 	25 mins
Taxes <ul style="list-style-type: none"> Discover the fields available to you while setting up your Tax Codes. 	21 mins

Course/Description	Duration
Deductions <ul style="list-style-type: none"> In this course, we will look at the fields available to you while setting up your Deduction Codes. 	19 mins
Assessment	21 mins

Fiscal Year End Split Batch 18.2

Course/Description	Duration
Fiscal Year End Split Batch <ul style="list-style-type: none"> In this course, we will look at how to handle situations where your fiscal year ends in the middle of a pay cycle. 	12 mins

Manual vs. Supplemental Manual Checks 18.2

Course/Description	Duration
Manual vs. Supplemental Manual Checks <ul style="list-style-type: none"> Learn about manual checks, supplemental manual checks, and when you should use each option. 	25 mins

New Employee Setup 18.2

Course/Description	Duration
New Employee Setup <ul style="list-style-type: none"> In this course, we will explore setting up a new employee in NaviLine. 	30 mins

Position Control & Authorizations 18.2

Description: Explore the functionality of Position Control and Authorizations within Payroll/Personnel.

Duration: 53 minutes

Course/Description	Duration
Position Control <ul style="list-style-type: none">In this course, you will learn about Position Control and the various options within this screen.	27 mins
Authorizations <ul style="list-style-type: none">In this course, you will learn about Authorizations and the various options within this screen.	26 mins

Termination 18.2

Course/Description	Duration
Termination <ul style="list-style-type: none">In this course, we will learn about terminating an employee in NaviLine.	13 mins

Understanding the Basics of Budgeting in Payroll and Personnel

Course/Description	Duration
Termination <ul style="list-style-type: none">This course reviews the mechanics used in budgeting along with additional ways to use this part of Payroll/Personnel (PR).	1 hour 13 mins

Working With Pending Values and One-time Amounts in Payroll and Personnel

Course/Description	Duration
Working With Pending Values and One-time Amounts in Payroll and Personnel <ul style="list-style-type: none">This course provides information about pending values, one-time amounts, and code fields that streamline work and help you to meet required deadlines.	1 hour 1 min

Planning & Engineering (PE)

Planning & Engineering (PE) 18.2

Description: Learn the functions of the Planning & Engineering Community Service Application.

Duration: 42 minutes

Course/Description	Duration
PE - Navigation <ul style="list-style-type: none">Learn how to navigate within the Planning & Engineering software application, as well as how to set up a maintenance path.	15 mins
PE – Project Records <ul style="list-style-type: none">Learn how to add a Project Record, change a Project Record, and how to view Project Record Details.	27 mins

Planning & Engineering File Maintenance Overview

Course/Description	Duration
Planning & Engineering File Maintenance Overview <ul style="list-style-type: none">This course provides an understanding about how the codes are set up and used during application processes within Planning & Engineering.	22 mins

Planning & Engineering Overview

Course/Description	Duration
Planning & Engineering Overview <ul style="list-style-type: none">This course provides a general overview about the functions available through PE and how it works with other community development applications.	40 mins

Simplifying the Review Process in Planning & Engineering

Course/Description	Duration
Simplifying the Review Process in Planning & Engineering <ul style="list-style-type: none">• This course provides information about the agency review step process and how it can simplify and make the review process easier and more efficient for individual departments and your organization.	40 mins

Understanding DMS and Planning & Engineering

Course/Description	Duration
Understanding DMS and Planning & Engineering <ul style="list-style-type: none">• This course provides information about how PE and DMS integrate to create documents.	21 mins

Working with Agendas in Planning & Engineering

Course/Description	Duration
Working with Agendas in Planning & Engineering <ul style="list-style-type: none">• This course provides information about creating an agenda and maintaining minutes for a meeting using Planning & Engineering.	19 mins

Purchasing & Inventory

Everything You Wanted to Know about Requisitions

Course/Description	Duration
Everything You Wanted to Know about Requisitions <ul style="list-style-type: none">This course will review the requisition entry process and the many features that are available with this process.	20 mins

Field Purchase Orders (FPOs) Overview

Course/Description	Duration
Field Purchase Orders (FPOs) Overview <ul style="list-style-type: none">This course provides an overview of the FPO process, including the general features of an FPO, detailed setup of the FPO module, different uses of an FPO, and benefits of using an FPO over other methods.	42 mins

Finding the Right Report in Purchasing/Inventory

Course/Description	Duration
Finding the Right Report in Purchasing/Inventory <ul style="list-style-type: none">This course provides an overview of various PI report types including purchase order, accounting, receiving, and vendor reports, and information on viewing and printing PI reports.	58 mins

Fiscal Year End Processing in Purchasing/Inventory

Course/Description	Duration
Fiscal Year End Processing in Purchasing/Inventory <ul style="list-style-type: none">This course provides an overview of the fiscal year end process, including the specific tasks that should be done prior to the new year, items to watch for after the new year starts, and detailed changes to the process.	58 mins

Implementing Electronic Processes for Purchasing in Purchasing/Inventory

Course/Description	Duration
Implementing Electronic Processes for Purchasing in Purchasing/Inventory <ul style="list-style-type: none">Upon completion of this course, you will learn the ways that Purchasing/Inventory uses electronic processes, as well as show you how to use email notifications for requisitions approval, requisition returns, and emailing the purchase order to the vendor.	12 mins

Inventory Adjustments and Reorder Processing in Purchasing/Inventory

Course/Description	Duration
Inventory Adjustments and Reorder Processing in Purchasing/Inventory <ul style="list-style-type: none">This course provides information about the different methods to adjust inventory quantity and value, the difference between each method, and the appropriate use of each method.	49 mins

New Employee Orientation for Purchasing/Inventory

Course/Description	Duration
New Employee Orientation for Purchasing/Inventory <ul style="list-style-type: none">Upon completion of this course, you will have an understanding of Purchasing/Inventory and demonstrate routine tasks new end-users may perform.	12 mins

Purchasing/Inventory (PI): New Employee 18.2

Description: This program provides an introduction to the Purchasing/Inventory application.

Duration: 3 hours 10 minutes

Course/Description	Duration
New Employee Orientation <ul style="list-style-type: none"> Familiarize yourself with Purchasing/Inventory, including common terminology, application interfaces, and processes. 	19 mins
Procurement Card Tracking: PI Interfaces <ul style="list-style-type: none"> Explore applications that interface with Purchasing & Inventory, such as the GMBA, Fixed Assets, Asset Management II, Work Orders, and Fleet Management. 	20 mins
Requisition Overview <ul style="list-style-type: none"> Discover how to create requisition in NaviLine, including how to add line items, comments, quotes, and attachments. 	26 mins
Understanding Receipts Processing <ul style="list-style-type: none"> Explore processing receipts, receiving & un-receiving items, and receiving excess quantities. 	25 mins
Demand and Process Generated Reports <ul style="list-style-type: none"> Explore reports generated on-demand or by a process, including the different report types, their locations, and how they can benefit your organization. 	33 mins
Electronic Process for Processing <ul style="list-style-type: none"> Discover how to access approval levels, as well as assign appropriate security rights to those who approve requisitions & purchase orders in your organization. 	18 mins
Working with Blanket Purchase Orders <ul style="list-style-type: none"> Discover information about Blanket Purchase Orders (BPO), such as how to create a BPO & receiving against a BPO. 	27 mins

Purchasing/Inventory Application Interfaces

Course/Description	Duration
Purchasing/Inventory Application Interfaces <ul style="list-style-type: none">This course will discuss which applications interface with Purchasing/Inventory and how transactions and information are created and sent to the other applications.	13 mins

Troubleshooting the Purchase Order Process in Purchasing/Inventory

Course/Description	Duration
Troubleshooting the Purchase Order Process in Purchasing/Inventory <ul style="list-style-type: none">Upon completion of this course, you will learn the requisition and purchase order process, including security set up, buyer processing and data maintenance. In addition, this course will discuss ways to monitor and correct issues with outstanding purchase orders.	13 mins

Understanding Purchase Requisition Entry and Approval

Course/Description	Duration
Working with Blanket Purchase Orders in Purchasing/Inventory <ul style="list-style-type: none">This course provides detailed instructions for entering and approving a purchase requisition in PI.	1 hour 13 mins

Working with Blanket Purchase Orders in Purchasing/Inventory

Course/Description	Duration
Working with Blanket Purchase Orders in Purchasing/Inventory <ul style="list-style-type: none">Upon completion of this course, you will learn about Blanket Purchase Orders, which will cover system control aspects, setting up and changing a Blanket, as well as tips and tricks for using Blanket purchase orders.	23 mins

Work Orders & Facility Management

Scheduled Maintenance and Inspections in Work Orders/Facility Management

Course/Description	Duration
Scheduled Maintenance and Inspections in Work Orders/Facility Management <ul style="list-style-type: none">• This course provides detailed information about how to set up the scheduled maintenance and inspections function as it relates to facilities.	51 mins

Working with Period End and Demand Processing in Work Orders/Facility Management

Course/Description	Duration
Working with Period End and Demand Processing in Work Orders/Facility Management <ul style="list-style-type: none">• This course provides information about each menu option for performing period end tasks and demand processing of information.	39 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
<p>Getting the Most Out of Your CentralSquare Customer Portal</p> <p>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 style="list-style-type: none"> • 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 <p>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>	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