

# Virtual Lab

# Event Schedule

Enterprise Permitting & Licensing

March 2022 – June 2022

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## Virtual Lab Event Schedule

Tyler Technologies offers the following training opportunities for Enterprise Permitting & Licensing:

March	Event	Hours	Eastern Time
March 1	Inspection Management Apps	2.0	9:00 AM – 11:00 AM
March 2	Workflow Basics – End User	2.0	3:00 PM – 5:00 PM
March 3	Workflow Basics & Configuration – Admin	3.0	2:00 PM – 5:00 PM
March 4	Inspections Mobile – Demo VL <i>(previously known as iG Inspect)</i>	1.5	9:00 AM – 10:30 AM
March 8	Civic Access Certification <i>(previously known as CSS)</i>	8.0	10:00 AM – 6:00 PM
March 9	Navigation – System Overview with Hub	2.5	9:00 AM – 11:30 AM
March 9	Custom Fields	3.0	2:00 PM – 5:00 PM
March 10	Contact Management	2.0	3:00 PM – 5:00 PM
March 14	User Setup & User Roles	2.0	3:00 PM – 5:00 PM
March 15	Permit Management App	2.0	3:00 PM – 5:00 PM
March 22	Navigation – System Overview with Hub	2.5	3:00 PM – 5:30 PM
March 23	eReviews – Review Coordinator & Manage My Reviews – Demo VL	2.5	9:00 AM – 11:30 AM
March 24	Business License & Civic Access	2.5	9:00 AM – 11:30 AM
March 24	Cashiering – End User	2.5	3:00 PM – 5:30 PM
March 25	Windows Service V2 Configuration – Admin	2.5	9:00 AM – 11:30 AM
March 28	Inspection Configuration	2.5	9:00 AM – 11:30 AM
March 29	Permit Configuration	2.0	9:00 AM – 11:00 AM
March 29	Plan Management App	2.0	3:00 PM – 5:00 PM
March 30	Plan Configuration	2.0	9:00 AM – 11:00 AM
March 31	Code Management Apps & Code Enforcement Mobile <i>(previously known as iG Enforce)</i>	3.0	9:00 AM – 12:00 PM
March 31	IO, IAA, Geo Rules (combo class)	3.0	2:00 PM – 5:00 PM

April	Event	Hours	Eastern Time
April 5	Navigation – System Overview with Hub	2.5	3:00 PM – 5:30 PM
April 6	Permit Management App	2.0	1:00 PM – 3:00 PM
April 8	Permit Configuration	2.0	1:00 PM – 3:00 PM
April 11	Contact Management	2.0	10:00 AM – 12:00 PM
April 12	eReviews – Review Coordinator & Manage My Reviews – Demo VL	2.5	9:30 AM – 12:00 PM
April 12	Inspection Management Apps	2.0	1:00 PM – 3:00 PM
April 13	Inspections Mobile – Demo VL	1.5	10:00 AM – 11:30 AM
April 13	Cashiering – End User	2.5	12:30 PM – 3:00 PM
April 15	System Settings – District	2.5	12:30 PM – 3:00 PM



April	Event	Hours	Eastern Time
April 18-21	Land Management Certification	32.0	10:00 AM – 6:00 PM
April 19	Workflow Basics – End User	2.0	1:00 PM – 3:00 PM
April 20	Professional License	2.0	1:00 PM – 3:00 PM
April 21	User Setup & User Roles	2.0	1:00 PM – 3:00 PM
April 26	Navigation – System Overview with Hub	2.5	9:30 AM – 12:00 PM
April 26	Workflow Basics & Configuration – Admin	3.0	1:00 PM – 4:00 PM
April 27	Custom Fields	3.0	9:30 AM – 12:30 PM
April 27	Plan Management App	2.0	1:00 PM – 3:00 PM
April 28	IO, IAA, Geo Rules (combo class)	3.0	10:00 AM – 1:00 PM
April 29	System Settings – System Wide	2.5	12:30 PM – 3:00 PM

May	Event	Hours	Eastern Time
May 2	Navigation – System Overview with Hub	2.5	12:30 PM – 3:00 PM
May 4	eReviews Admin – Demo VL	5.0	9:00 AM – 2:00 PM
May 5	Business License & Civic Access	2.5	12:30 PM – 3:00 PM
May 6	Contact Management	2.0	12:00 PM – 2:00 PM
May 10-11	eReviews Certification	16.0	10:00 AM – 6:00 PM
May 10	Workflow Basics – End User	2.0	1:00 PM – 3:00 PM
May 12	Permit Configuration	2.0	1:00 PM – 3:00 PM
May 17	Cashiering Fee Basics & Configuration	3.0	12:00 PM – 3:00 PM
May 19	IO, IAA, Geo Rules (combo class)	3.0	12:00 PM – 3:00 PM
May 25	Code Enforcement Mobile – Demo VL	1.5	10:30 AM – 12:00 PM
May 26	Navigation – System Overview with Hub	2.5	9:30 AM – 12:00 PM
May 26	eReviews – Review Coordinator & Manage My Reviews – Demo VL	2.5	12:30 PM – 3:00 PM
May 31	Permit Management App	2.0	10:00 AM – 12:00 PM
May 31	Plan Management App	2.0	1:00 PM – 3:00 PM

June	Event	Hours	Eastern Time
June 1	Plan Configuration	2.0	1:00 PM – 3:00 PM
June 6-9	System Administration	32.0	11:00 AM – 7:00 PM
June 7	Code Management Apps & Configuration	3.0	10:00 AM – 1:00 PM
June 8	Inspection Management Apps	2.0	10:00 AM – 12:00 PM
June 9	Inspections Mobile – Demo VL	1.5	10:00 AM – 11:30 AM
June 13-16	System Administration	32.0	10:00 AM – 6:00 PM
June 14	Business License & Civic Access	2.5	12:30 PM – 3:00 PM
June 16	Code Enforcement Mobile – Demo VL	1.5	1:00 PM – 2:30 PM



June	Event	Hours	Eastern Time
June 21	Navigation – System Overview with Hub	2.5	10:00 AM – 12:30 PM
June 23	Enterprise Service Requests – Demo VL <i>(previously known as Tyler 311)</i>	2.0	10:00 AM – 12:00 PM
June 24	Map App	1.5	10:30 AM – 12:00 PM
June 27	Permit Management App	2.0	3:00 PM – 5:00 PM
June 28	Plan Management App	2.0	10:00 AM – 12:00 PM
June 28	Navigation – System Overview with Hub	2.5	1:00 PM – 3:30 PM
June 29	eReviews – Review Coordinator & Manage My Reviews – Demo VL	2.5	12:30 PM – 3:00 PM
June 30	Cashiering– End User	2.0	10:00 AM – 12:00 PM
June 30	Workflow Basics – End User	2.5	1:00 PM – 3:00 PM

*More classes to follow soon. Schedule is released each quarter.*



## Class/Event Descriptions

Tyler Technologies offers the following training opportunities outlined in the descriptions below. For more information, please visit [Help.TylerU](https://help.tyleru.com). To find out which events are tailored for end users, and which are more appropriate for administrators, please refer to [Appendix B](#).

### Business License & Civic Access (previously known as CSS)

**Length:** 2.5 Hours

**Intended Audience:** End users who need to understand how citizens apply and manage business licenses through Tyler’s public-facing web application, Civic Access.

**Description:** Instructors explain how a citizen submits a business license application in Civic Access, previously known as Citizen Self Service (CSS). Once the application is submitted, municipalities use the Permitting & Licensing Business module to manage businesses. In the class, attendees learn how to manage a business and a business license, view attached licenses, create a tax remittance account, and view attached tax remittance accounts from a business record. Attendees also renew a business license and learn to manage the fees associated with a renewal in Permitting & Licensing. Instructors also explain how citizens renew a business license in Civic Access.

### Cashiering Fee Basics & Configuration

**Length:** 3.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Instructors provide an understanding of the cashiering settings related to the suite; this includes user permissions and security options for user roles. Students also explore setup apps such as Fee Schedules, GL Accounts, Payment Methods, Fees and Fee Templates. Instructors show attendees how to configure the four basic types of fees and review the settings for each fee type. Users create a basic fee template and learn how it is associate to a type/class combination.

### Cashiering – End User

**Length:** 2.5 Hours

**Intended Audience:** End users who need to understand the cashiering module within Enterprise Permitting & Licensing. If you click Pay Now inside of the Permitting & Licensing suite, then this class is for you.

**Description:** End users leverage the Cashiering module to invoice and transact payments within the suite. They learn how to create and manage an invoice. Instructors cover how to open a batch and make a payment. Users understand how to process a void, refund, and NSF, and close a batch.



## Code Enforcement Mobile – Demo VL (previously known as iG Enforce)

**Length:** 1.5 Hours

**Intended Audience:** End users who need to understand the Code Enforcement Mobile app.

**Description:** Attendees learn how to use the Code Enforcement Mobile app (previously known as iG Enforce) on an iPad to manage and create code cases from the field. Instructors demonstrate how to view daily inspections for cases, complete inspection details, add new requests or code cases while in the field, manage assigned cases by adding details, violations, and attachments, and sync the case to the Permitting & Licensing suite. This Virtual Lab is demo only.

## Code Management App & Code Enforcement Mobile

**Length:** 3.0 Hours

**Intended Audience:** End users who need to understand the Code Management App and the Code Enforcement Mobile app.

**Description:** Attendees learn how to create a case in the Code Case module and add violations, process fees, create inspections and/or hearings, print code case documents, and close the case. Attendees also learn how to use the Code Enforcement Mobile app (previously known as iG Enforce) on an iPad to manage and create code cases from the field. Instructors demonstrate how to view daily inspections for cases, complete inspection details, add new requests or code cases while in the field, manage assigned cases by adding details, violations, and attachments, and sync the case to the Permitting & Licensing suite.

## Code Management App & Configuration

**Length:** 3.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of the Code module.

**Description:** Attendees learn how to create a case in the Code Case module and add violations, process fees, create inspections and/or hearings, print code case documents, and close the case. Instructors explain how to create and manage the configuration aspects of the code module. Topics include code categories, violations, code case types, and code workflows.

## Contact Management

**Length:** 2.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of the Contact module.

**Description:** Attendees learn about global contacts and best practices for their business processes. The class covers how to create a new global contact and associate it to a record. Instructors explain the concept of contact types and license validation for various contact types. End users also learn how to use the Merge Contact App to manage data integrity of global contacts.



## Custom Fields

**Length:** 3.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Instructors explain the purpose of custom fields and how they are used to capture information that is not found within the standard fields in the suite. Admins learn which types of custom fields can be added to a layout and how to insert tabs on a layout to keep information organized. Instructors review how database names of custom fields are used throughout the suite and how to connect the custom field layout to a type/work class and an activity. Students learn how custom fields are used in Civic Access when different than the back office.

## Enterprise Service Requests – Demo VL (previously known as Tyler 311)

**Length:** 2.0 Hours

**Intended Audience:** End users who need to understand the Enterprise Service Requests integration to Permitting & Licensing suite.

**Description:** Instructors demonstrate how a citizen submits a request in Civic Access and how it flows into the Enterprise Service Requests application (previously known as Tyler 311). Attendees observe two scenarios: 1) How to close the request within the Service Request application, and 2) how the request escalates to a code case in the Permitting & Licensing suite, followed by how municipalities close a code case.

## eReviews Admin – Demo VL

**Length:** 5.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of eReviews.

**Description:** Instructors demonstrate how the configuration of eReviews ties in with Permitting & Licensing end-user pages, such as Review Coordinator and Manage My Reviews apps. Attendees learn best practices for configuration and administration of the eReviews integration with a Bluebeam Prime Portal Account. This Virtual Lab is demo only.

## eReviews – Review Coordinator & Manage My Reviews – Demo VL

**Length:** 2.5 Hours

**Intended Audience:** End users who manage reviews conducted by multiple people or departments and who need to understand the process of eReviews integration to Bluebeam.

**Description:** Instructors demonstrate the eReviews process with the integration to Bluebeam studio sessions. End users learn about the responsibility of the back-office users when a review is active in the workflow and understand the citizen's view within Civic Access. Attendees also learn about the purpose and functions of the Review Coordinator and Manage My Reviews HTML apps. Instructors demonstrate how reviewers access a Bluebeam studio session to create markups from Manage My Reviews. This Virtual Lab is demo only.





## Inspections Mobile – Demo VL (previously known as iG Inspect)

**Length:** 1.5 Hours

**Intended Audience:** End users who need to understand the Inspections Mobile app.

**Description:** Attendees learn how to use the Inspections Mobile app (previously known as iG Inspect) on an iPad to view daily inspections, complete inspection details, view inspection history, add attachments and/or pictures, and sync inspections. This Virtual Lab is demo only.

## Inspection Configuration

**Length:** 2.5 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of the Inspection module.

**Description:** Attendees learn how to set up the Inspection module and configure the components in the correct sequence. This class covers Inspection Types, Inspector Types, and the inspection settings within System Settings, and related Windows Service Tasks.

## Inspection Management App

**Length:** 2.0 Hours

**Intended Audience:** End users who need to understand the Inspection module.

**Description:** Attendees learn to use the Inspections module to create, schedule, and manage an inspection. Instructors teach students how to search for inspections, add an Inspection Case to a permit, and how to use the Inspection Management Dashboard and Schedule and Assign app.

## IO, IAA, & Geo Rules (combo class)

**Length:** 3.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Attendees learn about Intelligent Objects (IOs), Automation Agent (IAA), Geo Queries and Geo Rules, and how to configure IOs to facilitate the running of a Geo Rule. The suite uses IOs to automate actions in a reactive manner. They are key components for triggering Geo Rules, computing fees, and generating emails, errors, alerts, and other notifications. The IAA is designed to automate tasks in a proactive manner. It is used to set values, generate emails, and perform other tasks. Instructors show students where to find setup guides, explain fields, and Geo Rule setup best practices.

## Maps App

**Length:** 1.5 Hours

**Intended Audience:** All end users of Enterprise Permitting & Licensing.

**Description:** Attendees learn about the Explore & Create Map App buttons and selection and navigation tools. Instructors teach students how to create spatial collections, link/create records, and discuss the purpose of the Create Mailing and Print Map apps.



## Navigation – System Overview with Hub

**Length:** 2.5 Hours

**Intended Audience:** All end users of Enterprise Permitting & Licensing.

**Description:** Attendees learn about the Enterprise Permitting & Licensing suite and its applicable business uses. The class begins on the Hub My EnerGov Home page, the suite's new landing page. Topics include Notifications, Tasks, Favorites, Custom Links, and Recent Cases. Attendees learn how to use the Omnibar and Advanced Search app and navigate other HTML apps such as Parcel Manager. At the end of the class, attendees are familiar with using the suite to input, collect, and analyze information, and generate reports and documents.

## Permit Configuration

**Length:** 2.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of the Permit module.

**Description:** Attendees learn how to set up the Permit module and configure the components in the correct sequence. Instructors teach administrators how to identify Permit module settings and about their impact for a municipality, along with configuration tricks and tips.

## Permit Management App

**Length:** 2.0 Hours

**Intended Audience:** End users who need to understand the Permit module.

**Description:** Attendees learn the tasks involved in processing a permit, including how to invoice and process fees, understand/manage workflow, complete Additional Info fields, create record-specific Activities, create and manage Conditions and Holds, and track Bonds.

## Plan Configuration

**Length:** 2.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of the Plan module.

**Description:** Attendees learn how to set up the Plan module and configure the components in the correct sequence. Instructors teach administrators how to identify Plan module settings and about their impact for a municipality, along with configuration tricks and tips.

## Plan Management App

**Length:** 2.0 Hours

**Intended Audience:** End users who need to understand the Plan module.

**Description:** Attendees learn the tasks involved in plan intake, including how to invoice and process fees, understand/manage workflow, complete Additional Info fields, create record-specific Activities, create/manage Conditions and Holds, and track Bonds.



## Professional License

**Length:** 2.0 Hours

**Intended Audience:** End users who need to understand the Professional Licensing module.

**Description:** Students learn how to issue a license to a contact (an individual) for a specific type and classification and manage fees. The class covers how to create, renew, and manage professional licenses. Attendees learn how to associate a contact with a professional license.

## System Settings – District

**Length:** 2.5 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Instructors explain the purpose of system-wide settings and why they are grouped together. Attendees learn about the components associated with District setup including department, district, system settings, zone, and holiday.

## System Settings – System Wide

**Length:** 2.5 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Instructors explain the purpose of System Wide setup and how to configure attachment groups, bonds, conditions, mailing address types, global meetings, global hearings, hearing types, cycle recurrences, meeting types, offices, tasks, and time types. Attendees learn how these components are related to other settings in the Permitting & Licensing suite.

## User Setup & User Roles

**Length:** 2.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Attendees learn how to create a new user in the Permitting & Licensing suite and manage and deactivate an existing user. Instructors explain the relationship between a user and a role and how to customize role security settings and restrict access.

## Windows Service V2 Configuration – Admin

**Length:** 2.5 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Attendees learn how to set up the windows service in the Permitting & Licensing suite and create schedules for different tasks. Instructors teach attendees about the relationship between service tasks and the suite's functionality.



## Workflow Basics – End User

**Length:** 2.0 Hours

**Intended Audience:** All end users of Enterprise Permitting & Licensing.

**Description:** Attendees learn about workflow functionality and review the most common types of workflow actions. Instructors teach attendees about the purpose of workflow, priority, and sort order, and how to add optional steps and actions.

## Workflow Basics & Configuration – Admin

**Length:** 3.0 Hours

**Intended Audience:** Administrators who are responsible for various components of setup and configuration of Enterprise Permitting & Licensing.

**Description:** Attendees learn about workflow functionality and review the most common types of workflow actions. Instructors teach attendees about the purpose of workflow, priority, and sort order, and how to add optional steps and actions. Instructors cover how to configure a workflow template and associate it to a case type/work class combination.



# APPENDIX A: Certification Courses

Certification courses, or tracks, are a combination of Virtual Lab classes. Certification courses are included with Assist and Virtual Lab subscriptions. For more details, please refer to [Tyler Community](#). Certification courses include the following topics:

## Civic Access Track

- Basic Functionality (End User)
- Technical Architecture  
Introduction/Business Process Options
- Jurisdiction Profile Mgmt./Misc.  
Configuration item
- Global Notification  
Announcements/User Registration
- Case Type Category Settings/Case Type  
Mappings
- Menu System Configurations
- GIS Map Functionality/Configuration
- Welcome Page Configuration
- Payment Configuration

## eReviews Track

- Civic Access (previously known as CSS) –  
Basic Functionality (End User)
- Permit/Plan Management apps
- eReviews – Review Coordinator &  
Manage My Reviews
- eReviews Admin

## HTML Apps Track

- Navigation – System Overview with Hub
- Plan Management App
- eReviews
- Permit Management App
- Inspection Management App
- Code Management App
- Business License
- Professional License

## Land Management Track

- Navigation – System Overview with Hub
- Permit Management App
- Permit Configuration
- Plan Management App
- Plan Configuration Settings
- eReviews
- Inspection Management App
- Inspection Configuration
- Inspections Mobile – Demo VL
- Maps App

## System Admin Track

- Navigation – System Overview with Hub
- Contact Management
- User Setup & User Roles
- System Settings – District
- System Settings – System Wide
- Custom Fields
- Cashiering Fee Basics & Configuration
- Workflow Basics & Configuration
- Maps App



## APPENDIX B: End-user vs. Admin Training

	Event name	End user	Admin
1	Business License & Civic Access <i>(previously known as CSS)</i>	X	
2	Cashiering Fee Basics & Configuration		X
3	Cashiering – End User	X	
4	Civic Access Admin Certification <i>(previously known as CSS Admin)</i>		X
5	Code Enforcement Mobile – Demo VL <i>(previously known as iG Enforce)</i>	X	
6	Code Management App & Code Enforcement Mobile	X	
7	Code Management App & Configuration		X
8	Contact Management	X	
9	Custom Fields		X
10	Enterprise Service Requests – Demo VL <i>(previously known as Tyler 311)</i>	X	
11	eReviews Admin – Demo VL		X
12	eReviews Certification		X
13	eReviews – Review Coordinator & Manage My Reviews – Demo VL	X	
14	HTML Apps Certification	X	
15	Inspection Configuration		X
16	Inspections Mobile – Demo VL <i>(previously known as iG Inspect)</i>	X	
17	Inspection Management App	X	
18	IO, IAA, & Geo Rules (combo class)		X
19	Land Management Certification		X
20	Maps App	X	
21	Navigation – System Overview with Hub	X	
22	Permit Configuration		X
23	Permit Management App	X	
24	Plan Configuration		X
25	Plan Management App	X	
26	Professional License	X	
27	System Administration Certification		X
28	System Settings: District		X
29	System Settings: System Wide		X
30	User Setup & User Roles		X
31	Windows Service V2 Configuration – Admin		X
32	Workflow Basics & Configuration – Admin		X
33	Workflow Basics – End User	X	

