CENTRALSQUARE
TECHNOLOGIES

TRAKiT® Web Utilities & Maintenance (WUM)

System Administrator Guide 18.1

Nondisclosure Statement

CentralSquare Technologies
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TRAKiT Support: 1-800-292-4526, option 4

Website: http://www.centralsquare.com

Trademarks

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TRAKiT System Administration

TRAKiT System Administrators

CentralSquare maintains a record of TRAKiT System Administrators and notifies these administrators about software and licensing updates, as well as CentralSquare-sponsored events. To add, change, or remove a TRAKiT System Administrator from our records, contact TRAKiT Support at **1-800-292-4526, option 4.**

TRAKiT Key

Each installation of TRAKiT requires a TRAKiT key to operate. The TRAKiT key contains the agency title, number of user licenses, authorized modules, and customized programming. The TRAKiT key is valid for one year (January–December) and is located in \\file server\bin32. System Administrators will receive an email in December with the agency's new key file.

To update the TRAKiT Key, complete the following steps:

1. Save the key file to **\\file server\bin32**
2. Rename the *current* TRAKiT key file to **`TRAKiT_YY.key`** (where YY is the two-digit year).
3. Rename the *new* TRAKiT key file to **`TRAKiT.key`** (from TRAKiT_AgencyName.key).

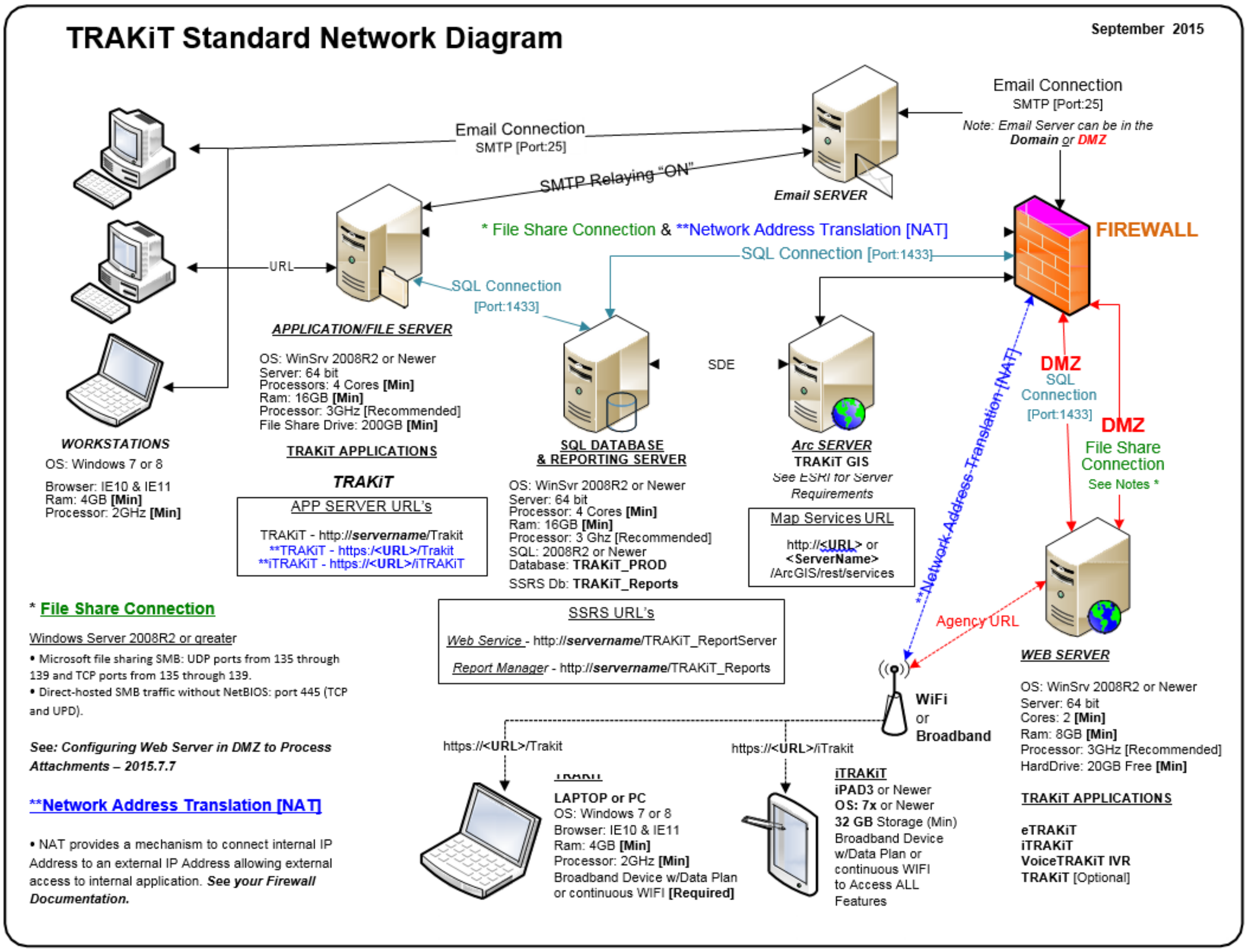
Tip: Contact CentralSquare to purchase additional licenses or update keys after agency name changes.

Client Support

To receive product updates, register on Connect Community at https://support.centralsquare.com by completing the following steps.

1. Under **Products**, select **TRAKiT**.
2. Click **View Release Notes** to see all release information.
3. Under **Following**, select both the **Following** and **Inbox** options to receive email notices for new postings.

For support questions or issues, contact TRAKiT Support at 1-800-292-4526, option 4.


TRAKiT Standard Network Diagram
September 2015
Email Connection
SMTP [Port:25]
Note: Email Server can be in the Domain or DMZ
Email Connection
SMTP [Port:25]
SMTP Relaying "ON"
Email SERVER
FIREWALL
* File Share Connection & **Network Address Translation [NAT]
SQL Connection [Port:1433]
URL
SQL Connection
[Port:1433]
APPLICATION/FILE SERVER
OS: WinSrv 2008R2 or Newer
Server: 64 bit
Processors: 4 Cores [Min]
Ram: 16GB [Min]
Processor: 3GHz [Recommended]
File Share Drive: 200GB [Min]
TRAKiT APPLICATIONS
TRAKiT
APP SERVER URL's
TRAKiT - http://servername/Trakit
**TRAKiT - https://<URL>/Trakit
**iTRAKiT - https://<URL>/iTRAKiT
WORKSTATIONS
OS: Windows 7 or 8
Browser: IE10 & IE11
Ram: 4GB [Min]
Processor: 2GHz [Min]
SDE
SQL DATABASE
& REPORTING SERVER
OS: WinSvr 2008R2 or Newer
Server: 64 bit
Processor: 4 Cores [Min]
Ram: 16GB [Min]
Processor: 3 Ghz [Recommended]
SQL: 2008R2 or Newer
Database: TRAKiT_PROD
SSRS Db: TRAKiT_Reports
Arc SERVER
TRAKiT GIS
See ESRI for Server Requirements
Map Services URL
http://<URL> or <ServerName> /ArcGIS/rest/services
DMZ
SQL Connection
[Port:1433]
DMZ
File Share Connection
See Notes *
**Network Address Translation [NAT]
Agency URL
SSRS URL's
Web Service - http://servername/TRAKiT_ReportServer
Report Manager - http://servername/TRAKiT_Reports
* File Share Connection
Windows Server 2008R2 or greater
• Microsoft file sharing SMB: UDP ports from 135 through 139 and TCP ports from 135 through 139.
• Direct-hosted SMB traffic without NetBIOS: port 445 (TCP and UPD).
See: Configuring Web Server in DMZ to Process Attachments – 2015.7.7
**Network Address Translation [NAT]
• NAT provides a mechanism to connect internal IP Address to an external IP Address allowing external access to internal application. See your Firewall Documentation.
WiFi
or
Broadband
https://<URL>/Trakit
https://<URL>/iTrakit
TRAKiT
LAPTOP or PC
OS: Windows 7 or 8
Browser: IE10 & IE11
Ram: 4GB [Min]
Processor: 2GHz [Min]
Broadband Device w/Data Plan or continuous WIFI [Required]
iTRAKiT
iPAD3 or Newer
OS: 7x or Newer
32 GB Storage (Min)
Broadband Device w/Data Plan or continuous WIFI to Access ALL Features
WEB SERVER
OS: WinSrv 2008R2 or Newer
Server: 64 bit
Cores: 2 [Min]
Ram: 8GB [Min]
Processor: 3GHz [Recommended]
HardDrive: 20GB Free [Min]
TRAKiT APPLICATIONS
eTRAKiT
iTRAKiT
VoiceTRAKiT IVR
TRAKiT [Optional]

Web Utilities & Maintenance (WUM) Interface

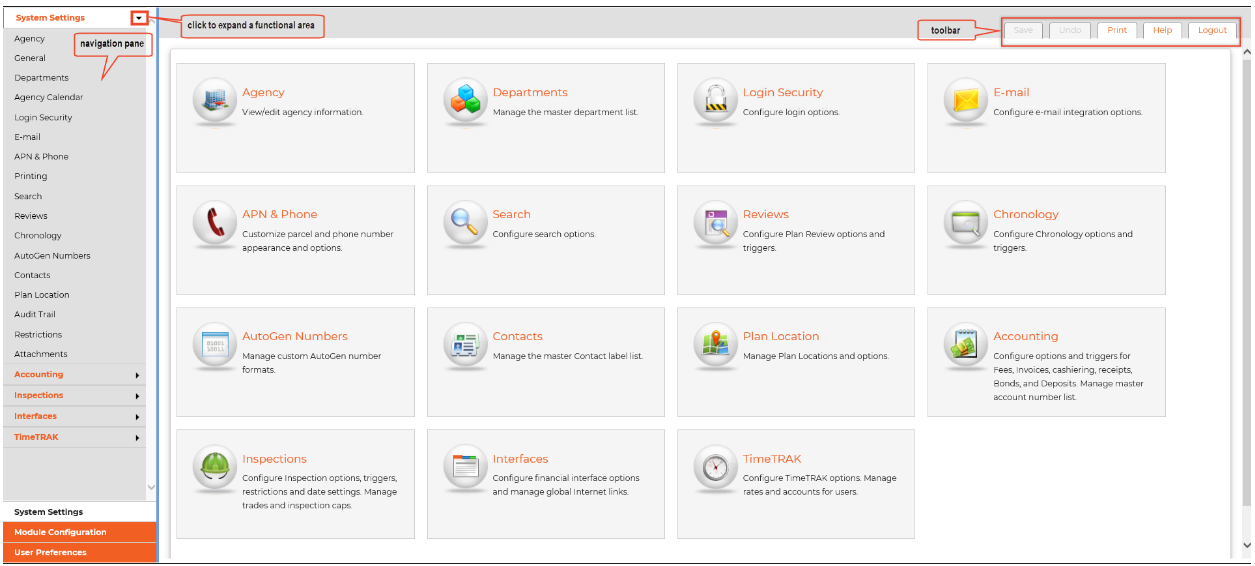
The WUM interface includes three major functional areas:

- System Settings
- Module Configuration
- User Preferences

Each area provides extensive options for customizing TRAKiT processing and operations.

Working in WUM

The following diagram shows the standard WUM navigation pane and toolbar.



Use the navigation pane to access all the system, module, and user settings in WUM. Click ▶ to expand a functional area. Click ⊞ to expand a settings group.

Use the toolbar for quick access to the following common functions:

- Save—Click **Save** to retain changes you made on the current page.

  Tip: In the lower right corner of the screen, the user ID and date of the last recorded change appear.

  Tip: Saved changes are visible to TRAKiT users the next time they log in to TRAKiT, after the change is made.
- Undo—Click **Undo** to discard any changes made since the last save.
- Print—Click **Print** to print your current view.
- Help—Click **Help** to open a documentation menu. From this menu, choose the documentation you want to view.
- Log out—Click **Logout** to log out of WUM.

Working in Grids

Grids in WUM can include the following functions:

- Add—To add an entry in a grid, click ✚.
- Delete—To delete an entry from the grid, click ✖.
- Reorder list—To change the order of the list, use one of the following methods.
    - Drag an item to a different position.
    - Change the number in the order column to indicate the new position for the item. The order column is usually indicated by ⟳ in the header.
    - Click on the column heading to sort the column in either ascending or descending order
- Edit—Click in the cell you want to change or click ✎.

  Note: The order of items in some grids affects the order of options in corresponding fields in TRAKiT.

✚	⟳	Inspection Type	Description	IVR	Results	Duration	UDF
✖	1	ANNUAL			365.0;APPROVED;ANNUAL	30	✚
✖	2	FIRE SAFETY			365.0;APPROVED;FIRE SAFETY	0	✚
✖	3	HEALTH			7.0;DECLINED;HEALTH	30	✚
✖	4	SPRINKLER			365.0;APPROVED;SPRINKLER	0	✚
✖	5	AFFORDABALE HOUSING			1.1;APPROVED;ANNUAL	0	✎
✖	6	LAND	Land Review	500	1.0;DECLINED;LAND	0	✚

System Settings

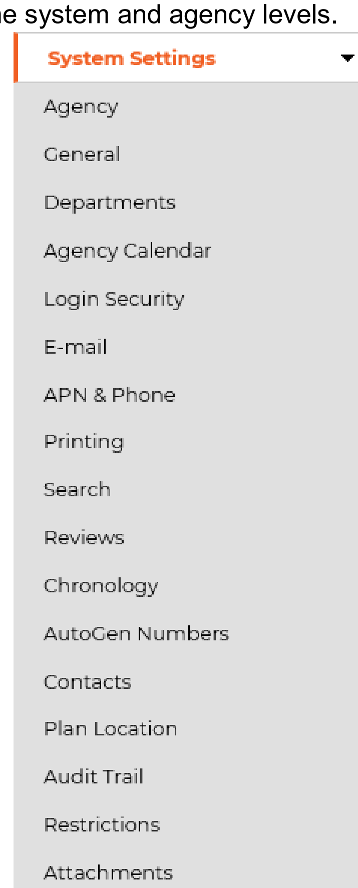
System settings contain preferences that apply to the entire TRAKiT application. System settings include the following functional areas:

- System Settings
- Accounting
- Inspections
- Interfaces
- TimeTRAK

System Settings

Use system settings to define and control preferences and processing at the system and agency levels. The following settings groups are available:

- Agency
- General
- Departments
- Agency Calendar
- Login Security
- Email
- APN & Phone
- Printing
- Search
- Reviews
- Chronology
- Autogen Numbers
- Contacts
- Plan Location
- Audit Trail
- Restrictions
- Attachments



Agency

The Agency page displays TRAKiT licensing key information and other agency information.

System Settings > Agency

Agency Information

- Name: Agency name displays here and on the TRAKiT main screen. Agency name is controlled by the TRAKiT key.

  Note: To change the name in this field, a new TRAKiT key must be requested from CentralSquare. Additional agency information may be entered for the following fields:
- Address
- City
- State
- Zip
- Display Name: Display name shows on the TRAKiT main screen below the agency name.

Billing Information

Use these options to set billing contact details.

- Address
- City
- State
- Zip
- Contact Name

License Key

These fields display information related to your license key and users. You cannot change these fields.

- **Expires**: Expiration date of the TRAKiT Key
- **Licenses**: Total number of TRAKiT user licenses for your agency
- **Licenses in Use**: Total number of licenses actively being used

Click the **Click here to view Current Activity** link to view a list of users who are logged in. See “Current Activity” for more information.

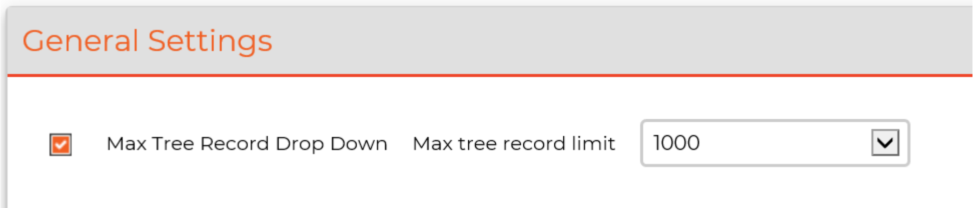
General

System Settings > General

The **Max Tree Record Drop Down** preference can increase performance speeds by limiting the number of records loaded. This option defaults to 1000 and applies to all activities, including permits. Record sort order varies, however, according to record types as follows:

- **Permit**, **Project**, **License**, **AEC**: Sorted by applied date
- **Case**: Sorted by start date

- **CRM**: Sorted by created date



Departments

Use this page to define the master list of agency departments used throughout TRAKiT.

System Settings > Departments

Departments

Create departments:

1. Select **Add** ( ).
2. Enter the **Title** under Departments.
3. **Save** changes.

Delete departments:

1. Select **Delete** ( ).
2. Select **OK** on the pop-up message to confirm the deletion.

Agency Calendar

This defines the **Work** (operational) days and **Non-Work** (nonoperational) days for inspection scheduling.

System Settings > Agency Calendar

Configure the Agency Calendar:

- **Work Day Start Time** & **Work Day End Time**: Select agency hours using the drop-down menus.
- **Validate Inspection Scheduled** & **Completed Dates with Work Dates Calendar**: Select to compare Inspection Scheduled & Completed dates to the Calendar to validate work days.
- **SET**: Select to automatically set all Weekends, January 1st, July 4th and December 25th as nonworkdays for the next six months.
- Set Additional Unique workdays & nonworkdays by clicking on the Date and selecting one of the following options from the drop-down list:
  - AM Closed: Closes the beginning of the work day until 12:00 pm.
  - PM Closed: Closes from 1:00 pm to the end of the work day.
  - Office Closed: Closes the entire work day.
  - Office Open: Opens the entire work day.
  - Custom: Sets specific times, in half-hour increments, to mark the office closed.

Tip: **Save** when finished to add to the agency calendar.

Login Security

This preference defines the method or methods that are used by TRAKiT users to access the application.

System Settings > Login Security

Login Method

- **Active Directory Integration**: Select to enable use with Active Directory.
- **Single Sign-On**: Select to enable single sign-on (SSO) for users.
- **LDAP Connection**: Enter & Save the connection information: **DCName** (Domain Controller Name) and **Domain** (Domain Name).

Login Options

- **Require User Email Address** must be selected for use with Password Reset when Active Directory is not used. Password Reset forces the user to update their password on the next login.
- **Send New Users a Welcome Email** is an available option for new users.
- **Sender Email Address** can be entered here for the standard welcome email.

Password Options

When Active Directory is *not* activated, the following security standards can be configured in the WUM:

- **Password Invitation Link** can be set to expire after the selected amount of minutes.
- **Password Expire** warnings can now prompt change of passwords at 30, 90, 120, or 180 days.
- **Lockout User** can lock the user account after failed attempts when set to 3, 5, or 10.
- **User Account Locked** for the selected number of hours. Select **0** to indicate that accounts remain locked until unlocked by an administrator.
- **Complex User Passwords** can be required and configured with the following options:
  - Password Length—Minimum and maximum
  - Lower Case Characters—Minimum and maximum
  - Upper Case Characters—Minimum and maximum
  - Numeric Characters—Minimum
  - Special Characters—Minimum and eligible
  - Unique Password—Count and duration

Note: If you clear the **Require Complex Use Password** option, passwords must be at least six characters with any combination of letters and/or numbers.

Active Directory Utilization

Active Directory allows TRAKiT users to log in using their network password.

- TRAKiT Login Screens can be bypassed when configured for Single Sign-On (**SSO**).
- LDAP services must be accessible from your DMZ for CentralSquare Mobiles and eTRAKiT Agency Center.

User Preferences > User Names

1. Set up users by entering the **Active Directory domain User ID** into the **T9 User ID field** for each TRAKiT user for the following user types:
    - TRAKiT users
    - Web Utility & Maintenance users
    - eTRAKiT Agency Center users
    - CentralSquare Mobiles users

    Note: For CentralSquare Mobiles users, **trakituser** must be added for remote support.
2. Turn On Active Directory using **Login Method** controls.
3. Contact CentralSquare to update web.config files to support TRAKiT, eTRAKiT, CentralSquare Mobiles, and WUM.
4. Log in to All products with **Domain Username** & **Password** to test Active Directory edits.

Email

This page provides the ability to configure access to an external email client.

System Settings > Email

Configuration

These email protocols are supported:

- SMTP
- Microsoft® Outlook®

Configure SMTP Protocol:

1. Select **SMTP** from the **Email Protocol** field.
2. Enter Server Name.
3. Enter **Port** (typically 25)
4. Save changes.

Note: This configuration uses the installed IDS Mail client.

Configure Microsoft Outlook Protocol:

1. Select Microsoft Outlook from the Email Protocol drop-down menu.
2. Select Use Registered Email Client under Email Options.
3. Save changes.

Email Options

- Use Registered Email Client: Select when configuring Microsoft Outlook protocol.
- Prevent User Changes to Email Address #1 and #2: Select to prohibit a user from modifying the email address attached to their user account.

APN & Phone

Use the Tax Parcel ID (APN) Format options to select a default format for tax parcel IDs (also known as assessor parcel number or APN). You can choose a predefined format of numbers only (indicated by #), an alphanumeric format (indicated by &) or a custom format that you define using # to represent numbers and/or & to indicate alphanumeric characters.

The **Parcel ID Components**, **Phone and Fax No. Format**, and **Default Area Code** options are not used.

Printing

This preference sets the default output when using the Print function.

System Settings > Printing

Defaults

Default Print Action: Select one of the **Print** options below to set the default output.

- **Display** to view the document or report prior to printing.
- **PDF** to view the document or report as a pdf file.
- **Attach** & **Display** to automatically display the document and attach it to the record.
- **Email** to automatically create an email attachment.
- **Attach** & **Email** to automatically email the document and attach it to the record.

Tip: Users can override these settings, but Default should be set to the most commonly used format.

Search

System Settings > Search

- **Use Header names in Search Field drop-down**
- **Include Custom field in Searches for CodeTRAK, PermitTRAK, ProjectTRAK and LandTRAK**

Reviews

This preference provides the ability to set Standard Options for Plan Reviews.

System Settings > Reviews

Review Options

- **Restrict Date Returned in Reviews to the current date or future date**: Select to require the user to enter a returned date the same as or later than the current date on the user's computer.
- **Set Date sent on auto reviews to current date**: Select to automatically set the review sent date to the current date when a review is added.
- **Use workdates calendar for aging reviews** (**default is calendar days**): Select to define the TRAKiT Workdates calendar as the source when determining the review's default due date.
- **Set RETURNED DATE when STATUS set on a Review**: Select to automatically set the returned date to the current date when a review status is selected.

- **Send an email alert when the default reviewer (with no alternate) or default AND alternate reviewers are unavailable on the due date of a new review**: Select to give the user ability to include an alternate reviewer in case someone is out of the office for an extended period of time or does not respond to the review in a timely manner. Click **Edit Reviewer(s) Unavailable Alert Email Template** to set up the format for the email.

  Note: The alternate reviewer's name and email address must also be added to the Review List in PermitTRAK or ProjectTRAK preferences. Feature functionality is accessed when the reviewer designates time as reserved in his or her TRAKiT Calendar.
- Click **Edit Reviewer(s) Unavailable Alert Email Template** to customize the email that is sent to the reviewer when a review is added. The alert email is sent when:
  - The default reviewer is unavailable on the due date and no alternate reviewer is defined
  - The default reviewer and alternate reviewer are both unavailable on the due date. Notification is *not* provided if the due date or reviewer is subsequently changed.

Chronology

This preference provides the ability to set Standard Options for the Chronology pane.

System Settings > Chronology

Chronology Options

- **Show Completed Date on 'ACTION' Entry Screen**: Select to add the Completed Date to the Add Actions screen.

Autogen Numbers

This preference provides the ability to create a sequential numbering scheme.

System Settings > AutoGen Numbers

Create autogen numbers:

1. Click ✚.
2. Complete the following columns:
   - **Name/Description**
   - **Prefix**
   - **Last Value Used**
   - **Width**—For example, if you enter 4, the maximum number that could be created is 9999.
   - **Increment By**—For example, if the current number is 50 and this field is **1**, the next available autogen number is 51.
   - **Leading Zero**—If you want leading zeros displayed in the autogen number, select this option.
3. Click **Save**.

   Tip: When two items from different modules are selected to be paid at the same time, the receipt number uses what is defined for **Multi_Receipt** in **System Settings** > **AutoGen Numbers**. **Multi_Receipt** must also be selected in the dropdown under Cash Register Options in System Settings > Accounting > Payments > Cashiering.

Contacts

System Settings > Contacts

This preference defines the Master Contact List and enables Direct Lookup.

Contact Types

Contact Types defines the Master Contact Type List for all TRAKiT modules. Add Contact Types:

1. Click ✚.
2. Enter Contact Type.
3. **Reorder** as required (optional).
4. **Save** changes.

Note: Contact types must be unique. Duplicates are not allowed.

Plan Location

Plan Location defines and tracks the physical location of a set of plans associated with a TRAKiT record. Since a physical set of plans may be large or complex enough to occupy several locations, columns for both Low Number and High Number are provided to identify the entirety of the physical space.

System Settings > Plan Location

Plan Location Options

- **Allow Manual Entry of Plan Location**: Select to allow the user to manually enter the location for a set of plans (e.g., JimsDesk01).

Add Plan Locations

Add New Plan Locations:

1. Click ✚.
2. Enter **Name** or **Description** of a physical location in the field.
3. Enter **Low Number** or starting location *(cube, bin)* of the physical file.
4. Enter **High Number** or ending location *(cube, bin)* of the physical file.
5. **Save** changes.

Audit Trail

This preference provides the ability to Capture and Log System Changes.

System Settings > Audit Trail

- **Enable GeoTRAK Audit Trail** (**Site Change Log**): Select to provide the ability to create a log entry in the GeoTRAK Site Change Log for changes that are made to GeoTRAK records. The Site Change Log records the following information:
    - Date/time the entry was made.
    - Field that was changed.

- New Value.
- Old Value.
- User making the change.

- **Enable Follow Me Audit Trail**: Select this option to display a **NEW** indicator on records in the TRAKiT Workspace **Follow** pane when the record is updated.
- **Enable Detailed Audit Trail**: Select to provide the ability to create a log of changes made to TRAKiT records. The feature will add the following two tables in the TRAKiT database:
  - **Prmry_AuditTrail**—Result of the most standard TRAKiT operations and contains the following fields:
    - CURRENT_VALUE: The value in the field after the change.
    - FIELD_NAME: The field where the change occurred.
    - ORIGINAL_VALUE: The value in the field prior to the change.
    - PRIMARY_KEY_VALUE: Unique ID of the record that was changed.
    - SQL_ACTION: Code that identifies the type of change (i.e., I = Insert, U = Update, D = Delete).
    - TABLE_NAME: The database table name where the change occurred.
    - TRANSACTION_DATETIME: The date and time the change occurred.
    - USER_ID: User ID of the TRAKiT account that performed the change.
  - **Prmry_AuditTrail_SQL—**Is the result of SQL scripts executed against the TRAKiT database and contains the following fields:
    - SEQ—Sequence number of SQL statement when multiple statements are executed from a single process.
    - SQL_COMMAND—SQL statement that was executed.
    - TRANSACTION_DATETIME—The date and time the change occurred.
    - USER_ID—User ID of the TRAKiT account that executed the script.
- **Enable User Login Audit Trail**: Select to create a unique table in the TRAKiT database that logs each user's changes. Tables are named **PRMRY_HISTORY_XXXX** (where XXXX is the month and year).

Access to Audit Trail Data

Access to Audit Trail tables is available using custom Crystal Reports or SQL Server Reporting Services.

Restrictions

System Settings > Restrictions

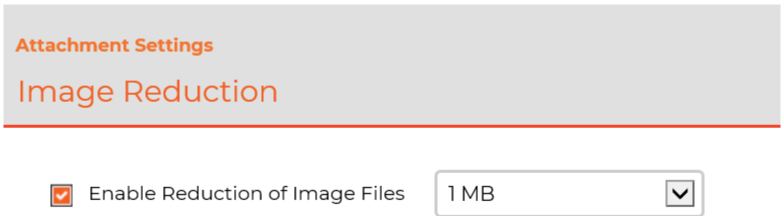
- Open Restrictions & Warning Flags by Default on All Records: Select to ensure all restrictions and warnings are immediately visible on records.

Attachments

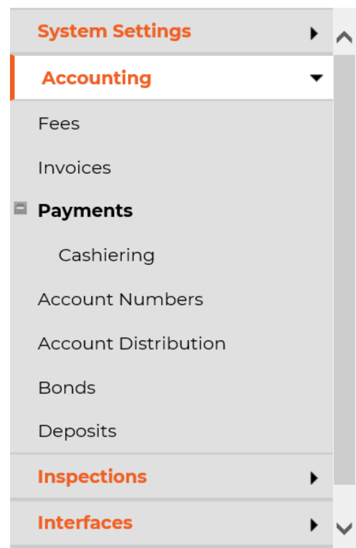
This allows reduction of attached images upon upload when they exceed the selected file size limit.

System Settings > Attachments

Use this option to increase performance speeds when generating reports with multiple images. Select the file size limit for images.



Accounting



Accounting contains preferences that apply to the entire TRAKiT application.

System Settings > Accounting

Accounting includes information and configuration for the following features:

- Fees
- Invoices
- Payments
- Account Numbers
- Account Distribution
- Bonds
- Deposits

Fees

Use the system-level accounting fee options to set the standard options associated with fee assessment and collection.

System Settings > Accounting > Fees

Fee Options

- **Expand Fee Schedule Tree when Inserting New Fees**—This option causes the fee tree to automatically display the fee schedule with all fee groups expanded.
- **Enable Fee Audit Tracking**—This option enables the tracking of additions, changes, and deletions to fees by a TRAKiT System Administrator.

To view a record audit trail, complete the following steps:

1. Open a TRAKiT record.

2. Expand the **Financial Information** pane.
3. Select **Fee History** on the functions menu.

Account Number Options

- **Account Number is Required for all FEES**—This option requires an account number to be assigned to all fees before they are assessed to a record. If a user attempts to enter a fee with no account number, a window appears to prompt the user to enter an account number before the fee will be assessed.
- **Undefined Account Numbers may be derived from Type**—This option provides the ability to assign a single account number to a record type. All assessed fees will be assigned the single account number. To assign an account number to a record type, see "Record Types."
- **Undefined Account Numbers may be derived from SubType**—This option provides the ability to assign a single account number based on a record's subtype. All assessed fees will be assigned the single account number.

Deny Observer Access

These options disable the Financial Information pane for users logged in with Observer access.

Invoices

Use the **Invoices** page to generate and track invoices.

Note: If cashiering is disabled in your database, invoicing is not available.

System Settings > Accounting > Invoices

Note: This feature requires a TRAKiT-specific invoice that is not automatically installed with the program. Contact CentralSquare if you are interested in using this feature.

The **Invoices** page includes the following options:

- Enable Invoicing—Select this option to use the TRAKiT Invoicing feature. If you select this option, the **Invoice** column appears in the **Financial Information** pane in TRAKiT, which includes the invoice date and number. Also, an invoice payment screen is added to the user's toolbar.
- Invoice No. AutoGen Name—This option provides the ability to select the invoice report used for generating receipts.
- Enable Check Entry—Select this option to allow users to receipt a check and disburse the funds manually.
- Number of days for Invoice to be Overdue—Use this option to define the number of days after which an invoice is considered overdue.

Payments

System Settings > Accounting > Payments > Cashiering

Payments contains the configuration for payment methods, credit card convenience fees, cash register options, and financial pane options.

Note: If cashiering is disabled in your database, these settings do not apply.

Cashiering

Use this section to define the list of available payment methods (for example, cash, credit card, or check).

To add a payment method, complete the following steps:

1. Click ✚.
2. Enter the payment method description and then press Enter. The new payment method is added at the end of the list.

   Note: The order of items in this list controls the order of options in the **Payment Method** field in TRAKiT. Reorder the list if you want the new item in a different position in the list.

Convenience Fees

Use the convenience fee options to charge a convenience fee when the payment method is credit card or eCheck.

To charge a convenience fee for credit card transactions, complete the following steps:

1. Select the **Enable Credit Card Convenience Fee** option.
2. In the **Account** field, select the account number for the convenience fee.

   Note: Account numbers are defined in Accounting Account Numbers. To view or change available account numbers, click the **Standard Accounts** link to navigate to the **Master TRAKiT Accounts** page.
3. If you want to charge a percentage of the payment as part or all of the convenience fee, type the percentage in the **Percent** field.

   Example: To charge 3% of the payment amount, type **3**.
4. If you want to charge a flat fee as part or all of the convenience fee, type the fee amount in the **Flat** field.

   Example: To charge a flat fee of $4.50, type **4.50**.

Note: The total convenience fee is the percentage of the payment plus the flat amount. If you want to charge a percentage of the payment only, leave the **Flat** field blank. If you want to charge a flat amount only, leave the **Percent** field blank.

To charge a convenience fee for eCheck transactions, complete the following steps:

1. Select **Enable eCheck Convenience Fee**.
2. In the **Account** field, select the account number for the convenience fee.

   Note: Account numbers are defined in Accounting Account Numbers. To view or change available account numbers, click the **Standard Accounts** link to navigate to the **Master TRAKiT Accounts** page.
3. In the **Flat** field, type the amount of the flat fee.

   Example: To charge a flat fee of $4.50, type **4.50**.

Cash Register Options

The options in this section control cash register functions in TRAKiT

This section displays a message to indicate whether the TRAKiT Cashiering feature is enabled or disabled in your database. If cashiering is disabled, you cannot make any changes to the options and TRAKiT ignores the settings in these options. If cashiering is enabled, these options are available.

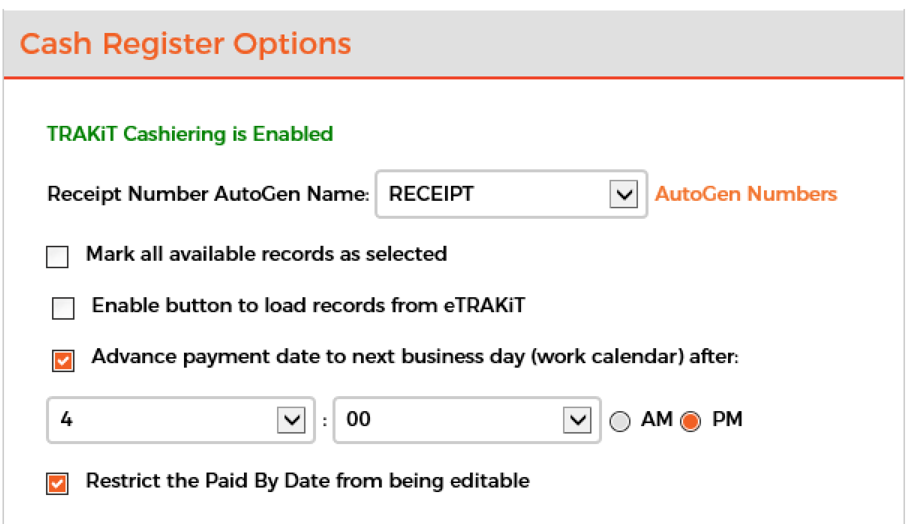
> **Note**: For more information about the Cashiering feature, see the “Cashiering” section in the *TRAKiT User Guide*.

> **Note**: To enable or disable the Cashiering feature, contact TRAKiT Support.

The following options are available for the Cash Register feature.

- Mark all available records as selected— Select this option if you want to automatically select all unpaid fees on any record added to the Cash Register.
- Enable button to load records from eTRAKiT— Select this option if you want to allow users to import fees assessed in eTRAKiT to the Cash Register.
- Advance payment date to next business day (work calendar) after— Use this option to specify the time that the payment date advances to the next business day. Type the hour and minutes in separate (unlabeled) fields and then select either **AM** or **PM**.

  Example: If you want payments made after 4:00 p.m. to show as paid on the following business day, type 4 in the hour field and 00 in the minute field. Then, select PM.



- Restrict the Paid By Date from being editable—Select this option if you do not want users to be able to change the **Date** field in the **Cashiering** dialog box.

Account Numbers

Account Numbers contains the Master List of Financial Account Numbers used in all TRAKiT modules.

System Settings > Accounting > Account Numbers

To add an Account Number:

1. Select **Add**.
2. Enter the Account #.
3. (Optional) Enter a Description.
4. (Optional) Reorder.

Tip: For existing TRAKiT clients, this table can be built from your historical data. Clicking **Build from Fees** will generate the account numbers from fees that currently exist in your database.

ONESolution Account Integration

A TRAKiT preference for real-time integration with ONESolution Finance is configured in the WUM. This preference is located in **System**/**Settings**/**Accounting**/**Account Numbers**.

1. Choose a ledger from the drop-down menu at the top.
2. Select Search in the Staging Area and a confirmation message appears.
3. Select OK to load ONESolution Accounts into the grid on the left.
4. Drag accounts from the left grid to the right grid to add them to Master TRAKiT Accounts.
5. Click **Save** to add the new account(s) to the TRAKiT prmry_accounts table. TRAKiT will then show the ONESolution accounts in screens where account numbers appear.

Note: This functionality uses CentralSquare web services for ledger and account data and authenticates using the User SID. For authentication, the user must be defined in the app pool where the WUM is installed, exist in the domain, and be added into OneSolution. The ledger drop-down menu will appear empty if not configured correctly.

Account Distribution

System Settings > Accounting > Account Distribution

Enable Account Redistribution

This option provides the ability to divide a single fee into multiple account numbers based on a predefined percentage.

To create an Account Distribution:

1. Select Add.
2. Enter the Account Code.
3. (Optional) Enter a Description.
4. Select Add in the distribution grid.
5. Enter a Fund number.
6. Enter an Account number.

7. Enter a Department number.
8. Enter the percentage of the total fee to distribute to this item.
9. Repeat steps 4–8.
10. To use the distribution, insert the Account Code in the Account Number field of the fees or subfees.

Note: The total of all items must be 100%.

Note: This information is only stored in the TRAKiT database and is normally accessed using either a Financial System export script or a custom report. If you need more information about how to implement this feature, contact CentralSquare.

Bonds

Bonds provides the options and configuration for the **Bonds** pane.

Note: If cashiering is disabled in your database, some of these functions are not available.

System Settings > Accounting > Bonds

The Bonds page includes the following options:

- Allow Bond Reduction even if Fees are Still Due—Select this option to allow the user to reduce a bond when there is an outstanding bond amount on the record.
- Limit ‘Paid By’ to Bond Contacts—Select this option if you want the **Paid By** field options to include only the names of contacts added to the bond through the **Bonds** pane.

Bonds can be configured with unique contact types, secured-by codes, and bond documentation information.

To add a bond contact type, complete the following steps in the **Bond Contact Labels** grid:

1. Click ✚.
2. Enter a unique name for the new bond contact type.
3. The new bond contact type is added to the end of the list. If you want to move the new item to a different position in the list, type the position number in the 🗘 (reorder) column.
4. Click **Save**.

To add a secured-by code, complete the following steps in the **Secured By Codes** grid:

1. Click ✚.
2. Enter a unique name for the new code.

   Note: You cannot use **Trust Account** or **Unknown** for the name.
3. The new code is added to the end of the list. If you want to move the new item to a different position in the list, type the position number in the 🗘 (reorder) column.
4. Click **Save**.

Deposits

Deposits provides general options for the deposits feature.

Note: If cashiering is disabled in your database, some of these functions are not available.

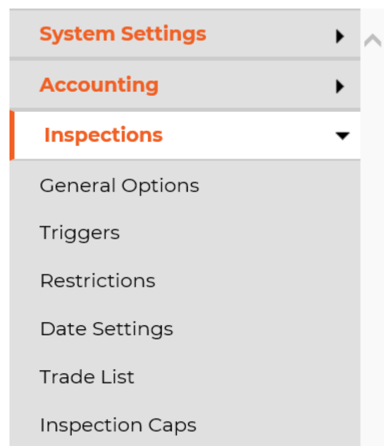
System Settings > Accounting > Deposits

The **Deposits** page includes the following options:

- Enable Deposits—Select this option to allow deposits.
- Pay fees with deposits automatically (no prompt)—Select this option if you always want to use deposit balances to pay unpaid fees. If you select this option, deposit balances are always used first when fees are paid.
- Deposit Threshold Warning—Select this option if you want a warning to appear on records when the deposit balance is less than a specified amount. If you select this option, enter the threshold amount.

Tip: For more information about Creating Deposits, see Module Configuration, "Deposits."

Inspections



Inspections contains preferences that apply to the entire TRAKiT application.

System Settings > Inspections

Inspections includes information and configurations for the following:

- General Options
- Triggers
- Restrictions
- Date Settings
- Trade List
- Inspection Caps

General Options

System Settings > Inspections > General Options

IVR & .WAV Options

The following options support IVR systems:

- Enable Inspector Personal Identification Number (PIN) usage. (IVR)
- Enable Inspection Type Code. (IVR)
- Make WAV files.
- Enable VoiceTRAK IVR Messaging

Note: Your specific implementation determines whether both of these options need to be enabled.

Triggers

Triggers contains the system-wide options for the inspections function.

System Settings > Inspections > Triggers

Automatically Set Inspection Completed Date

Select **Set Inspection Completed Date to Current Date when Inspection Result is Set** to automatically set the completed date to the current date when a user selects an inspection result.

Fees Due

Select **Display Notice if Fees are Due when** '**Add Inspection**' **is Clicked** to display a prompt to the user that identifies the amount currently due on the record.

Restrictions

Restrictions contain the system options that will limit or require certain types of data in the inspections function.

System Settings > Inspections > Restrictions Date Restrictions

- Select **Prevent COMPLETED date earlier than SCHEDULED date** if you want to require the user to enter an inspection completion date on or after the scheduled date.
- Select **Allow Inspection Type to be Changed if Completed Date Not Set** if you want to allow the user to change the type of inspection prior to the completion date being set.

Inspector Related Restrictions

Select **Can't Edit Inspector Name without OVERRIDE_INSPECTOR_LOCK Permission** to restrict the ability to reassign or change an inspector's name to either an Administrator or User with the override permission.

Date Settings

Date Settings contains the options and preferences that apply to the inspections function.

System Settings > Inspections > Date Settings

Inspection Duration

To define a List of Inspection Durations:

1. Select **Add**.
2. Enter the inspection duration.
3. (Optional) **Reorder**.

Display Date Fields

- Select **Show** '**Completed Date**' **on** '**INSPECTION**' **entry screen** to add the completed date field to the Add Inspection (cardview) screen.
- Select **Hide** '**Scheduled Date**' **on** '**INSPECTION**' **entry screen** to remove the scheduled date field from the Add Inspection (cardview) screen.

Trade List

Trade List supports the functionality of trade-specific inspections.

System Settings > Inspections > Trade List

To add a Trade Name to the List:

1. Select **Add**.
2. Enter a name/description.
3. (Optional) **Reorder**.

For more information about trade-specific inspections, see “Create Inspection Types.”

Inspection Caps

Inspection capping enables you to limit the number inspections that can be scheduled each day for each inspector.

System Settings > Inspections > Inspection Caps

To configure inspection caps, complete the following steps:

1. Select **Enable Inspection Caps**.
2. (Optional) Select **Inspection Caps**. If you select this option, multiple inspections on the same record count as one inspection towards the daily cap.
3. Review and, if necessary, update the Capped Inspectors list. To add an inspector to the list, drag the inspector from the inspectors list on the left to the Capped Inspectors list. To remove an inspector, click ✖.
4. Assign the **Capped Inspector** as the **Default Inspector** on the inspection(s) you want to cap. For more information about how to set a default inspector, see “Create Inspection Types.”
5. Ensure that all holidays and nonworkdays are set on your agency’s calendar.

To set daily caps for each inspector, complete the following steps:

1. Click **Set Caps**.
2. In the **Select Month** field, choose the month you want to work with.

   Note: You can set caps up to 90 days in advance.
3. For each day, for each inspector, enter a value to indicate the maximum number of inspections that can be scheduled that day for that inspector. You can enter values in the following ways:
   - Type the number for each day. The values are 0–99. Type a value from 1 to 99 to indicate the maximum number of inspections that can be scheduled. Type 0 to indicate that no inspections can be scheduled for that day.
   - Set a default workday cap for an inspector for the selected month. To set the default cap, type the number of inspections in the **Default** column and then click **Apply**. The default cap is applied to each day in the month and replaces any existing cap values. After setting the default cap, you can manually change the cap for a specific day.
   - Leave the field blank. When you click **Save**, TRAKiT sets blank workdays to 99.

Note: Saturday and Sunday are nonworkdays by default and so the caps are set to 0. You can manually change the cap values for these days. If you set a value other than 0, the background changes to green to highlight that inspections can be scheduled for this inspector on this nonworkday.

4. Click **Save** to save your selections. Click **Cancel** to close the dialog box without saving changes.

To create a Capp-able Inspector:

1. Select the inspector(s) from the Inspectors Available for Inspection Capping list.
2. Add the selected inspector(s) to the list on the right (capped inspector list).

Caution: Zeros entered in the grid indicate that no inspections can be scheduled. Fields will be empty until the inspection cap has been entered. Edited weekend cells appear green. Additional notes and warnings also appear.

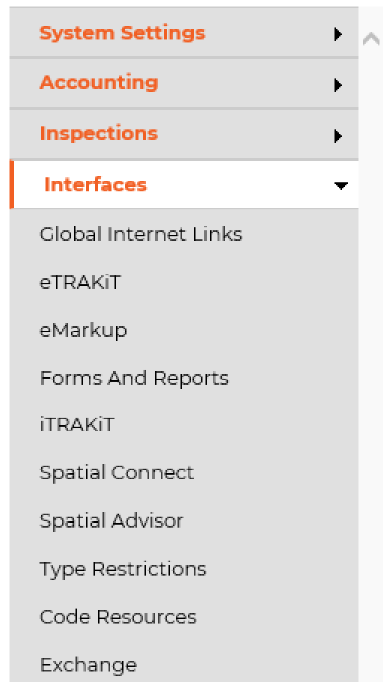
Interfaces

Interfaces contains the settings for interconnectivity between TRAKiT and other applications.

System Settings > Interfaces

These applications include:

- Financial
- Global Internet Links
- eTRAKiT
- eMarkup
- Forms and Reports
- iTRAKiT
- Spatial Connect
- Spatial Advisor
- Type Restrictions
- Code Resources
- Exchange



Financial

To access the **Financial** options, click **Interfaces** on the WUM home page.

Global Internet Links

Global Internet Links defines the internet and intranet links available to all TRAKiT users.

System Settings > Interfaces > Global Internet Links

To create links:

1. Select the **Add** button.

2. Select a category.
    - *Internet Links:* Accessible through the Internet Links feature.
    - *Code Search Links:* Accessible through Internet Links in CodeTRAK on the Notes screens.
    - *Imaging Links:* Accessible through the Imaging Links feature.
3. Enter a title or description for the link.
4. Enter the URL.
5. Select Browser if you want the link to open in a separate browser window. (optional)

Tip: Special tags can be used in URLs that will allow TRAKiT to pass data to the website. General tags will work with {all} groups and will map to listed database fields. Tags must be contained in braces { }.

{**RECORD_NUMBER**} - PERMIT_NO (PermitTRAK), PROJECT_NO (ProjectTRAK), CASE_NO (CodeTRAK), BUS_LIC_NO (LicenseTRAK), ST_LIC_NO (AEC TRAK), SITE_APN (GeoTRAK)

{**RECORD_TYPE**} - PERMITTYPE, PROJECTTYPE, CASETYPE, BUSINESS_TYPE, AECTYPE, GEOTYPE

{**SITE_APN**} - SITE_APN (all modules). *If not present will return blank.*

{{**SITE_APN**}} - SITE_APN (all modules). Reformats value to the parcel formatting specified in System Settings > APN & Phone.

Tip: For more information about parcel number formatting, see "Printing."

{**LOC_RECORDID**} - LOC_RECORDID (all modules). *Will return blank if not present.*

{RECORD_GROUP} - Will return group PERMIT, PROJECT, CASE, LICENSE, AEC, PARCEL.

eTRAKiT

System Settings > Interfaces > eTRAKiT

Show eTRAKiT Field in Attachments: Provides the ability to identify which attachments are visible in eTRAKiT. Enabling this feature adds an eTRAKiT column to the attachments screen. An attachment with the eTRAKiT box selected will be visible in eTRAKiT. Attachments where the eTRAKiT box is not selected will not be visible in eTRAKiT (default).

eMarkup

System Settings > Interfaces > eMarkup

There are two components to stamp administration. First, create the stamp template using the viewer in eMarkup. Then to automate the template use, set up the System Settings for eMarkup interface in the Web Utilities & Maintenance software.

Create Stamp Templates

A Stamp Template is a group of markup items (or entities), defined by the author as a stamp. The template can contain any of the available markup items, including variables and raster images.

1. Open a document to use as a reference for size and shape of the stamp template.
2. Verify that you are on page 1 of the document.
3. Select the **Markup File** icon, select **Stamp Templates** and New to open the **Annotate** toolbar.

4. Use the available markup tools to create a group of one or more items.

   Tip: The following tools are not available for use with the stamp tool: changemarks, hyperlinks, and the Edit Text tools.

Edit Stamp Templates

1. Open the file where the original stamp template was created.
2. Select the Markup File icon, select Stamp Templates and Open.
3. In the open dialog box, scroll to select a saved template file and **Open**. When using the same file, the stamp places at its original coordinates. If placing a stamp on another file, click to select the location of the stamp.
4. Using the annotate toolbar, choose the **Select** tool and click to activate the individual elements to edit, move, delete, copy or add markup elements.
5. When editing is complete, select all stamp items and click on the **Markup File** icon, **Stamp Templates** and **Save** to save the template with the same name. Select **Save As** to save the template with a different name.

   Tip: Stamp templates should be edited against the same document each time and must always be created on the first page of the file.

Stamp Token Variables

Use tokens in stamp templates to automatically update text values. When creating a stamp, use a markup text tool or select a single text item to display the variable text button. Select and enter a percent sign (%) to display the list of possible choices for variables.

- %**Date—**Inserts the date the print was spooled.
- %**SysDatePlusDays**(**x**)—Inserts a date the specified number of days past the system date. Replace *x* with the desired number of days.
- %**Time—**Inserts the time the print was spooled based on a 12-hour clock (AM/PM).
- %**MilTime—**Inserts the time the print was spooled based on a 24-hour clock.
- %**Title—**Inserts the name of the document.
- %**Page—**Inserts the page number.
- %**TotalPages—**Inserts the total number of pages.
- %**BatesPgNo**(**x**)—Bates Number. This tag is used to indicate the starting page number and the number of digits to use. For example, %BatesPgNo(0002) would place 0002 on the first page, 0003 on the next page.
- %**Login—**Inserts the Login ID of the person who issued the print.
- %**User—**Inserts the TRAKiT user ID of the person who issued the print.
- %**Prompt**(**username**)—Inserts the user name of the person who issued the print.
- %**Hostname—**Specifies the hostname of the machine that issued the print.
- %**IPAddress—**Specifies the IP Address of the machine that issued the print.
- (DBString & DBUpdateString are not applicable for eMarkup)
- %%—Inserts a single % character.

- ©—Inserts the copyright symbol.
- ®—Inserts the registered trademark symbol.

Tip: Text entry fields can be edited at any time during the review process until the markup stamp is finalized by printing to PDF. Stamp templates created in one file format (such as PDF) should only be applied to files of the same format type to prevent unintended scaling.

Create Stamp Tokens

Create a stamp template using the Text tool to draw the stamp area and set the text font properties (style, size, and color).

1. Enter the descriptive text for each item. This text is considered the stamp preview text.
2. Use the **Select** tool to highlight the text to be replaced and select the button.
3. Enter % to display the list of possible variables and choose the corresponding one to insert. Repeat steps 1–2 for each variable token desired.
4. Select all stamp items and save the group as a stamp template by selecting the **Markup File**, **Stamp Templates**, and then click **Save** or **Save As**.
5. Enter a name for the new template. The stamp template is saved to the server's list of available choices for users to insert on editable markup layers. A newly created or updated stamp becomes immediately available when the user accesses the server folder again using the **Stamp** button.
6. To exit the Stamp Template tool, select the **Markup File**, **Stamp Templates** and **Close**.

Stamp Automation

Stamp automation is set up in the Utilities & Maintenance software. When enabled, a stamp is associated with a Permit or Project action and may be activated for specific users only.

System Settings > Interfaces > eMarkup

eMarkup Stamp Admin

1. Select the eMarkup Stamp Admin hyperlink to access the automation settings.
2. Choose the **Group** module to which the stamp will apply: **Permit**, **Project**, or **General** (for global use).
3. Select the users that can have access to the stamp.
4. Under Actions, choose the Type of Action for which to apply the stamp, for example: Add Review, Update Review Status, Add Inspection, Update Inspection Status, Update Record, or Send Email.
   a. Then choose an Action.
   b. Next, set Parameters (type, status, email addresses, etc.)
   c. Enter a standard message to apply in the field provided.

Forms and Reports

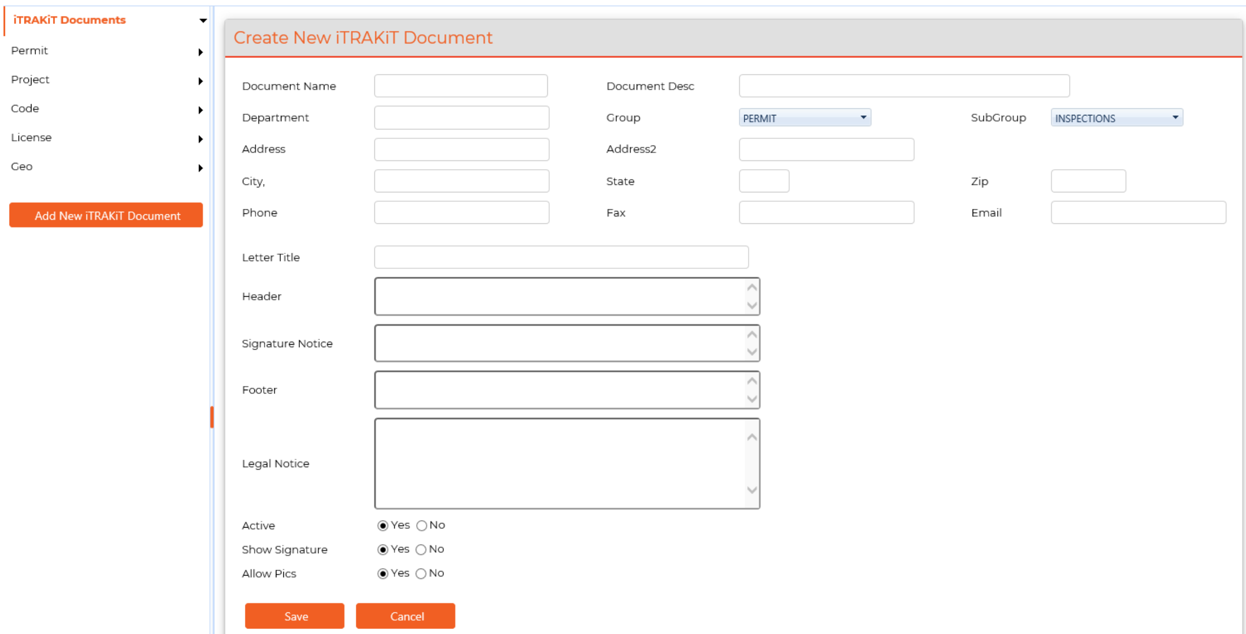
For information about how to create and configure merge documents, see “Merge Documents.”

iTRAKiT

These options enable you to define templates for documents you want to print from CentralSquare Mobiles.

System Settings > Interfaces > iTRAKiT

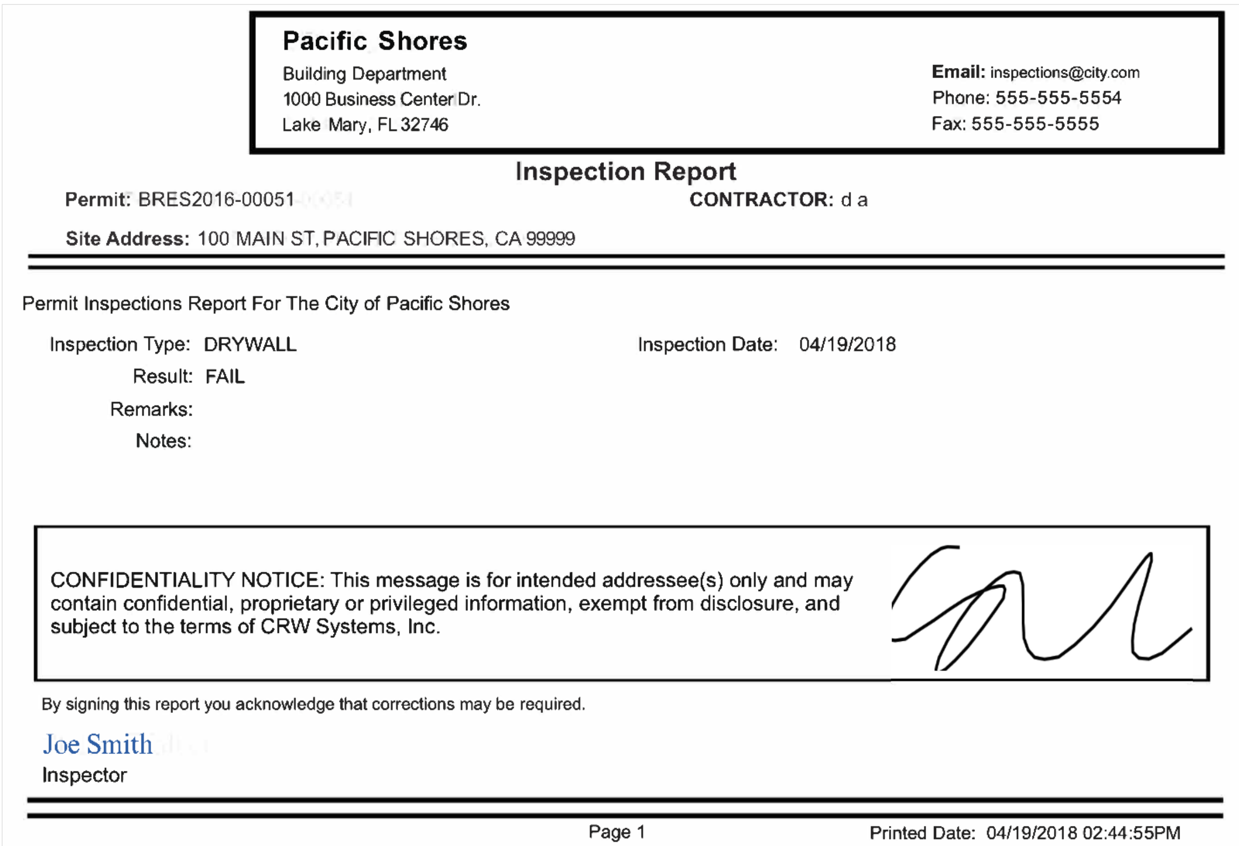
1. Click **Add New iTRAKiT Document**.



2. Complete the following fields as needed for your document:
   - Document Name
   - Document Desc
   - Department
   - Group
   - SubGroup
   - Address
   - Address2
   - City
   - State
   - Zip
   - Phone
   - Fax
   - Email
   - Letter Title
   - Header

- Signature Notice
- Footer
- Legal Notice
- Active—Select **Yes** to make this document available in CentralSquare Mobiles
- Show Signature—Select **Yes** to enable the user to sign the document on the iPad
- Allow Pics—Select **Yes** to enable the attachment of images (maximum of three) to the letter

3. Click **Save**. (Below is an example result of printing a document in CentralSquare Mobiles with these settings.)



Pacific Shores
Building Department
1000 Business Center Dr.
Lake Mary, FL 32746

Email: inspections@city.com
Phone: 555-555-5554
Fax: 555-555-5555

Inspection Report

Permit: BRES2016-00051
CONTRACTOR: d a

Site Address: 100 MAIN ST, PACIFIC SHORES, CA 99999

Permit Inspections Report For The City of Pacific Shores

Inspection Type: DRYWALL
Inspection Date: 04/19/2018
Result: FAIL
Remarks:
Notes:

CONFIDENTIALITY NOTICE: This message is for intended addressee(s) only and may contain confidential, proprietary or privileged information, exempt from disclosure, and subject to the terms of CRW Systems, Inc.

By signing this report you acknowledge that corrections may be required.

Joe Smith
Inspector

Page 1
Printed Date: 04/19/2018 02:44:55PM

Tip: The new document displays after CentralSquare Mobiles feeds are refreshed in the WUM, usually every hour.

Duplicate/Copy Existing Documents:

1. Click the module title to expand of the list of existing documents.
2. Select the document to duplicate/copy.
3. Select Duplicate Doc.
4. Change document elements are needed.
5. Select **Save**.

Delete existing documents:

1. Click the module title to expand of the list of existing documents.
2. Select the document to delete.
3. Select Delete Doc.
4. Select **Save**.

Spatial Connect

System Settings > Interfaces > Spatial Connect

This preference is available ***only with GIS Professional*** and requires additional configuration. Spatial connect allows for real-time GIS updates and spatial drawings on the fly. When utilizing spatial connect real-time GIS updates, TRAKiT users may notice decreased performance speeds.

Note: Contact CentralSquare Professional Services for additional Spatial Connect criteria and configuration requirements.

Spatial Advisor

Use spatial advisor to make auto-generated inspections, conditions, chronology/actions, reviews, and fees based on a location. (For example, a parcel in a historic district or near a river might require different or additional inspections than parcels in other areas.)

System Settings > Interfaces > Spatial Advisor

Select parameters to set spatial rules for the ArcGIS server.

Type Restrictions

System Settings > Interfaces > Type Restrictions

Code Resources

System Settings > Interfaces > Code Resources

Manage the eCodes username and password.

Exchange

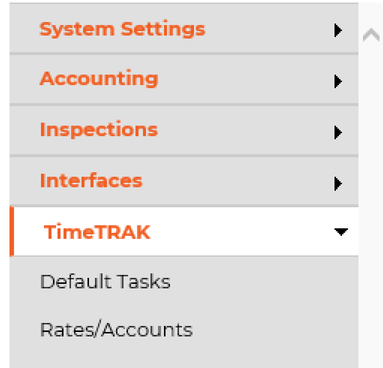
System Settings > Interfaces > Exchange

Exchange Settings

Enter the Microsoft Exchange server name, email address, password, and domain.

TimeTRAK

System Settings > TimeTRAK



TimeTRAK provides the ability to track the amount of time spent on an activity (Chronology, Inspection, or Review) and automatically assess a fee based on the user's hourly rate.

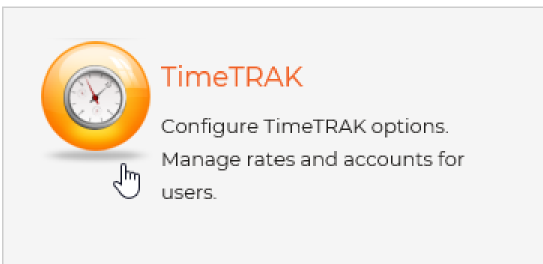
To configure TimeTRAK:

1. Set the General Options.
2. Define the Default Tasks.
3. Assign hourly Rates and Account Numbers as needed.

General Options

TimeTRAK provides the ability to choose general preferences, including TRAKiT and Utilities & Maintenance Notification options.

To access these options, click TimeTRAK on the WUM home page.



Select the checkbox next to the desired activities and notification options.

Default Tasks

TimeTRAK provides the ability to associate time with a generic activity or specific activity through **Default Tasks**.

System Settings > TimeTRAK

The System Administrator can select whether to use the generic title (Chronology Action, Inspection, or Review) or the activities title.

To use the generic title, select **Use "CHRONOLOGY ACTION" as Task Type**, **Use "INSPECTION" as Task Type**, or **Use "REVIEW" as Task Type**.

To use activity-specific titles:

1. Select Use Specific Action, Inspection, or Review Type.
2. Click **Create Tasks for all Actions**, **Inspections**, or **Review Types**. This will create a separate entry for each activity.

Rates/Accounts

System Settings > TimeTRAK > Rates/Accounts

Set the Rate and Accounts for a User

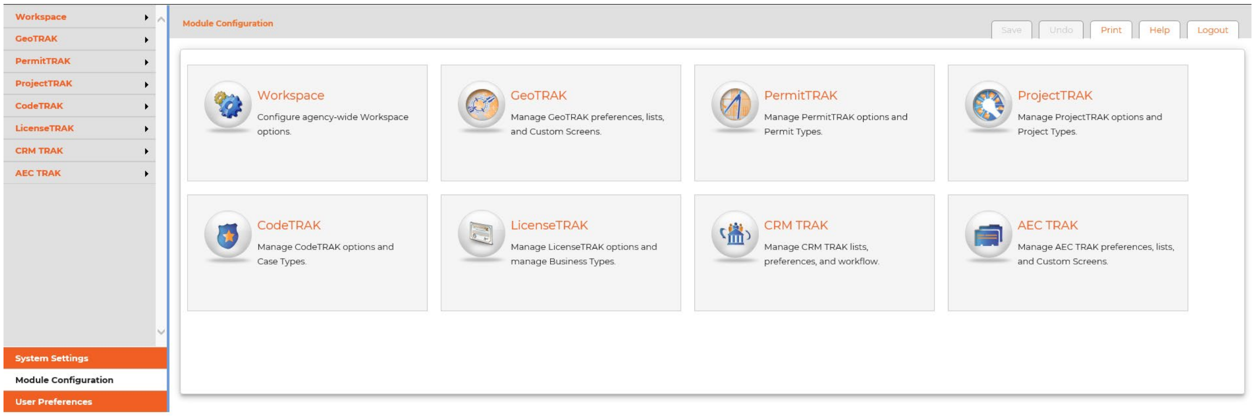
1. Select the user from the drop-down menu.
2. Enter the **Rate** (**$/hr**) and **Account** number for each activity.
3. Select **Save**.

Tip: Use **Set All Rates** or **Set All Acct Numbers** to automatically set the same rate and account number for every activity for the selected user.

Tip: Use **Copy to Other Users** to copy the rates and account numbers from the selected user to another user.

Tip: The deposits feature can be combined with TimeTRAK to automatically create a fee that reduces or draws down the deposit as fees are incurred through the review, inspection, or chronology activity features. For more information about Deposits, see “Deposits.”

Module Configuration



Workspace

The following option is available in the Workspace settings:

- **Include Subdivision within the My Tasks, Inspection Center, and Review Center widgets**—Select this option to display the subdivision name for residental addresses in the TRAKiT Workspace, in the My Tasks, Inspection Center, and Review Center panes.

Enable Extended Filter

Adds the ability for the user to filter inspections in the Inspection center by zip code or city name.

GeoTRAK

GeoTRAK contains the module-specific configurable components and preferences.

Module Configuration > GeoTRAK

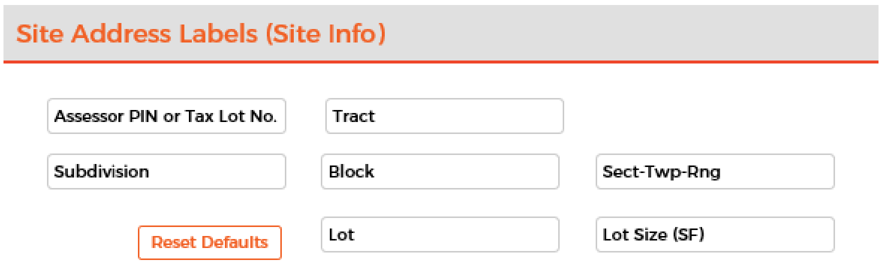
Site Info

Site Address Validation

Use the **Require linking to a GeoTRAK record** option to require users to link new records to a GeoTRAK record. This prevents users from entering site information directly on the record. Users must add permit, project, and case records from the GeoTRAK record or from a permit, project, or case record that is linked to the GeoTRAK record that the new record will be linked to.

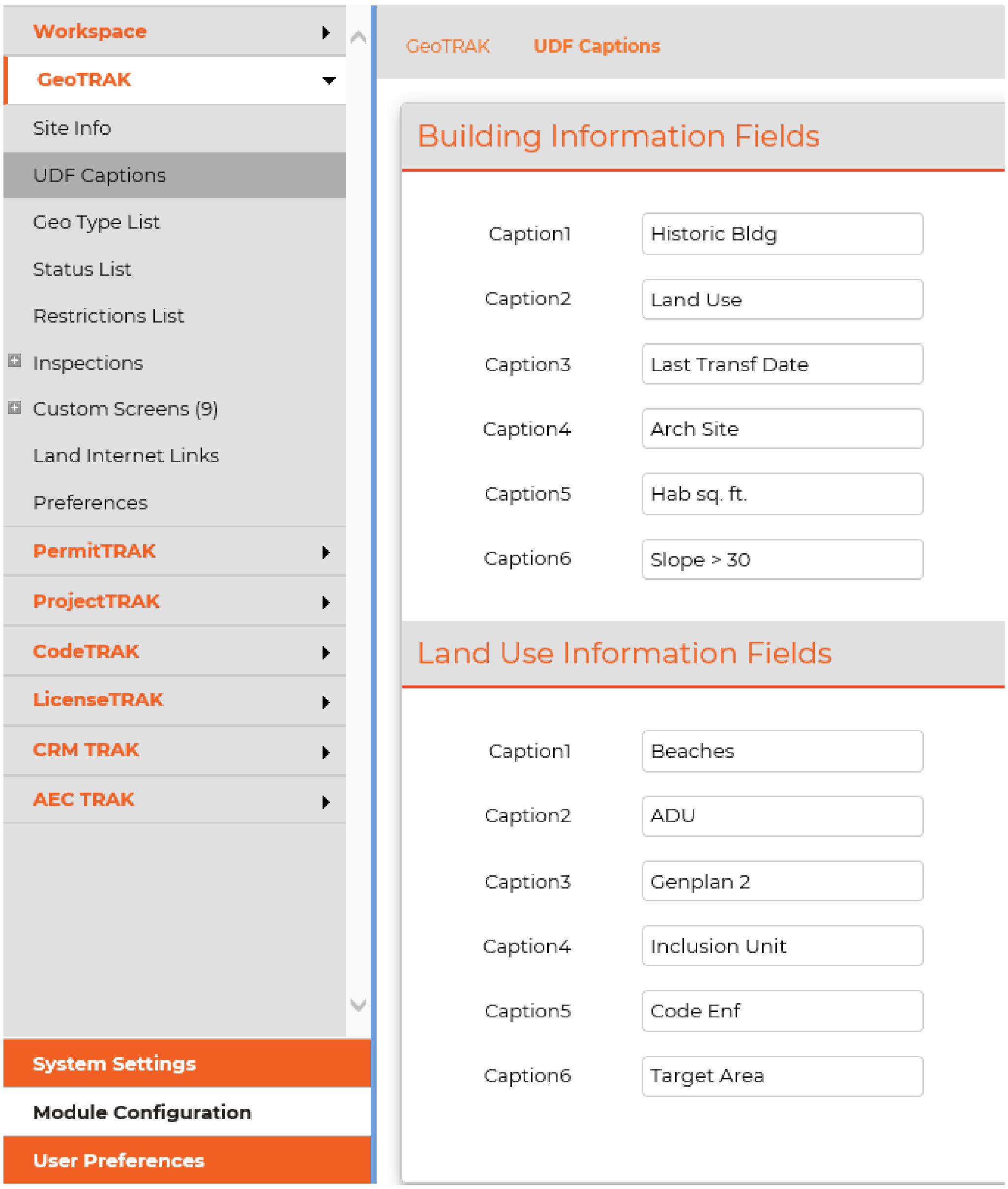
Site Address Labels

Use these options to customize the labels attached to the data fields in the GeoTRAK site address section of TRAKiT. Enter unique labels on an as-needed basis. The reset button will return the fields to the default labels, as shown in the image below.



UDF Captions

Use these settings to rename six captions in the **Building & Land Use Info** pane in TRAKiT. The corresponding fields in the database are located in Geo_OwnershipUDF and titled BLDGDATA01, BLDGDATA02, BLDGDATA03, BLDGDATA04, BLDGDATA05, BLDGDATA06, LANDUSE01, LANDUSE02, LANDUSE03, LANDUSE04, LANDUSE05, and LANDUSE06.



Geo Type List

Define specific geotypes that are used in GeoTRAK type list.

Add a new geotype:

1. Select **Add** and enter the new geotype title.
2. (Optional) Sort the list.
3. Select **Save**.

Status List

Define the GeoTRAK status list.

Add a New Status

1. Select **Add**.
2. Enter the new status.
3. (Optional) Sort the list.
4. Select **Save**.

Restrictions List

Define the GeoTRAK restrictions list.

Add a New Restriction

1. Select **Add**.
2. Enter the new restriction.
3. Select **Save**.

Inspections

For information about configuring Inspections, see “Inspections.”

Custom Screens

For additional information about configuring Custom Screens, see “Custom Screens.”

Land Internet Links

For information about configuring internet links, see “Module-Specific Internet Links.”

Preferences

Parcel Options

- **Lock Parcel record when record status is**: This preference locks the GeoTRAK record using the status field. For additional information about how to maintain the GeoTRAK status list, see “Status List.”
- **Lock Parcel when Permit, Project, Case, or License Status has the Parcel-Lock flag turned on**: Enables you to set a specified status on a record in PermitTRAK, ProjectTRAK, or CodeTRAK that would prevent any user from creating a new record linked to the GeoTRAK record.

  To enable this feature:

  1. Open Module Configuration > GeoTRAK > Preferences
  2. Select the **Lock Parcel when Permit, Project, Case, or License Status has the Parcel-Lock flag turned on** option.
  3. Open Module Configuration > PermitTRAK, ProjectTRAK, or CodeTRAK > Status List
  4. Select Parcel Lock for every status that can lock the GeoTRAK record.

  Note: A GeoTRAK record can be locked by multiple records. A user will not be able to create a new record on the GeoTRAK record until all locks have been removed.

  Tip: Clicking on the **Locked** indicator in GeoTRAK will display the record number(s) and the user that applied the status lock.
- **Use AutoGen Number for New Parcels**: Used to identify the auto-number generator for temporary GeoTRAK records. **Important:** The prefix for the auto-generated number used for temporary GeoTRAK records *must* begin with the letter **T**. CentralSquare recommends using the prefix **TEMP**.
- **Disable Attachments DELETE**: Disables all user’s ability to delete attachments (this feature overrides the user’s privileges). Does not apply to System Administrators.
- **Lock Status**: Enables lock status on parcel except for System Administrators.

Addressing Options

- **Use advanced addressing fields with separate text boxes for each address element**: This feature adds fields to the Geo_Ownership table and the GeoTRAK interface for street prefix, street name, street type, street suffix.

  Note: Enabling this feature permanently alters the Geo_Ownership table.
- **Use Foreign Addressing**: Adds an additional field to enter the country code. Enter the default county code in the text box.
- **Use for Site Unit No**: Provides the ability to rename the Site Unit No field label.

Attachment Auto-Email Preferences

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

LicenseTRAK

LicenseTRAK contains module-specific configurable components and preferences.

Module Configuration > LicenseTRAK

Advanced Processing

Use Advanced License Processing (ALP) to specify and perform license operations such as late fee assessment, automatic expiration, and email notification in bulk and unattended. Set up rules for batch processing in TRAKiT WUM and then perform the batch processing from TRAKiT, where you can also view the resulting changes to LicenseTRAK records.

Before using ALP functions in TRAKiT, set up the following options:

- Renewal Periods
- Parameter Sets
- Fee Assessment Rules

Renewal Periods

Use the Renewal Period options to add, modify, or delete date ranges used for renewal processes. After you set up renewal periods, assign a renewal period to each license type. Licenses that are assigned a renewal period can be renewed during the renewal period only.

Adding a Renewal Period

To add a renewal period, complete the following steps.

1. Navigate to Module Configuration > LicenseTRAK > Advanced Processing > Renewal Periods.
2. In the renewal period table, click ✚. A new row appears in the table.
3. Type or select values in the **Name**, **Month Start**, **Day Start**, **Month End**, and **Day End** columns.
4. Click **Save** in the toolbar. The date range appears in the **Date Range** column.

   Tip: TRAKiT calculates the year portion of renewal periods and increments the year automatically. You do not have to enter a year when adding a renewal period.

   A renewal period can cross calendar years. For example, a renewal period can start on November 1, 2018, and end on February 15, 2019.

Assigning a Renewal Period to a License Type

Use this feature to assign one or more renewal periods to license types and subtypes.

You can assign multiple renewal periods to a license type as long as the renewal periods do not overlap (do not include any of the same dates).

> **Note**: Renewal periods assigned to a license subtype override the renewal period assigned at the type level. If you do not want a subtype to use the type-level renewal period, you must add a parameter set for the subtype. The parameter set for the subtype can be blank if you do not want a renewal period assigned to the subtype.

To assign a renewal period to a license type, complete the following steps *for each license type and/or subtype:*

1. Navigate to Module Configuration > LicenseTRAK > License Types > *license type* > Parameter Sets.
2. In the parameter set table, click ✚. A new row appears in the table.
3. Select a renewal period in the **Renewal Period** column.

   Note: See "Parameters Sets" for more information about the **Parameter Set** column.
4. Click **Save**.

Additional Renewal Period Actions

In Module Configuration > LicenseTRAK > Advanced Processing > Renewal Periods, you can modify or delete a renewal period.

To modify a renewal period, click in the row you want to change and change the fields as needed. Then click **Save**.

To delete a renewal period, click ✖ in the row you want to delete. Click **OK** and then click **Save**.

Parameter Sets

Parameter sets are collections of actions that are completed during batch processing. Use the options on the **Parameter Sets** page to specify rules for renewing licenses through ALP batch processing.

To update an existing parameter set, click in the corresponding column in the grid to change the parameter set name, description, or type. Click **Operation Setup** to change the actions that occur during batch processing for that parameter set.

To add a parameter set, complete the following steps:

1. Click ✚. A blank row appears in the grid.
2. Type the name and description for the parameter set.
3. Select the type of processing. The options are:
   - Renewal—Can only be run during a renewal period set up on the **Renewal Periods** page.
   - Ad Hoc—Can be run at any time and as often as required.
   - Branch
4. Click **Save**.
5. Click **Operation Setup** in the row you added.
6. Drag operations (actions) from the master list to the new parameter set.
7. When the parameter set includes all the actions you want to perform, click **Save**.
8. For each item in the parameter set listing:
   a. Click **Operation Values Setup**.
   b. Choose the values for each item in the listing.
   c. Click **Save**.
   d. Click **Back**.
9. Click **Back**.

The following additional options are available for parameter sets:

- Batch eMail eTRAKiT Renewals
- eTrakit Email URL
- Assigned Owner to Shared Search Group
- Change Assigned Owner to Shared Search Group

Fee Assessment Rules

Use this page to set up and manage rules for fees assessed during ALP batch processing.

Note: If you change fee codes, be sure to update these rules.

Departments

The Department feature provides the ability to associate a user with a specific department, a prefix with a specific department, and a record type with a specific department. The benefit to this configuration is that it provides the jurisdiction with the ability to limit a user's ability to create records associated with his/her department. For example, Building and Public Works are both using PermitTRAK. By associating a user and a record type with a department, when the user creates a new record he or she will only be able to create records assigned to either their specific department or any record type designated as **All Departments**.

Enable the Department Feature

1. Create one or more departments.
2. Associate each user with a department. For more information about how to associate a user with a specific department, see "User Names."
3. Associate a record type with either a specific department or designate as **All Departments**. For more information about how to associate a record type with a specific department, see "Record Types."
4. Associate a prefix with either a specific department or designate as **All Departments**. For more information about how to associate a prefix with a department, see "Adding a Prefix."

Prefixes

Each module's (PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, and CRM TRAK) records contain a record number. Record number formats can contain a prefix and a sequential number. Only one record numbering format can be defined per TRAKiT module. The following is a list and example of the record numbering formats that you may choose from:

- Prefix only (BLD-0001)
- Prefix and year (BLD11-0001)
- Prefix and four-digit year (BLD2011-0001)
- Prefix, year, and month (BLD1101-0001)
- Year only (11-0001)
- Four-digit year (2011-0001)
- Year and month (1101-0001)
- No prefix (0001)

Record number formats are defined in **Module Configuration** > module > **Prefixes** or **Record Numbering**.

Define a Format for a Module

1. (Optional) Click **Allow Manual Entry of Permit Number Prefix** to allow users to manually enter a prefix prior to record creation. A sequential number will still be assigned. This feature will add a prefix list item titled **User Definable**.
2. Select the record format from the list on the left and Create Prefixes.
3. Select the number of sequence digits (defines the number of digits in the sequential number).
4. Set the number of Year/Month Grace Days.

   Provides the user the ability to select the Year or Month for a new record that is created within the grace days window. For example, a department defines a format of Prefix Year and Month with three Grace Days. A user creating a record on March 30, 2011 will be presented with a choice of the following Prefixes: BLD1103 or BLD1104. The Grace Days window extends this choice to the number of designated days prior to the end of the month or year and to the number of designated days after the beginning of the month or year. In the previous example, the Grace Days window would start on March 28–April 3.The default prefix is the current month.
5. Click Rebuild Number Control.

Adding a Prefix

1. In the prefix grid, click **Add** and enter the prefix (maximum of 6 characters).
2. (Optional) Enter a description.
3. (Optional) Enter a department (only required if you want to limit the user's ability to select a prefix during record creation based on the user's and the prefix's assigned department).

Records

The TRAKiT record is the base object within each of the modules. A record can represent any definable object within your jurisdiction. Examples of records include parcels, permits, development projects, code enforcement cases, business licenses, or citizen complaints.

Records consist of configurable components and standard module data fields. This section will describe how to add, modify, and delete the configurable components.

Records created within PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK and CRM TRAK have type-specific configurable components. The configurable components within GeoTRAK and AEC TRAK are generic to the module.

Configurable components include:

- Types
- Subtypes
- Valuations
- Fees
- Reviews
- Status
- Inspections
- Contacts

- Chronology Activities
- Documents
- Custom Screens
- Preferences
- Workflow (CRM TRAK only)
- Auto Email by Type and Status (AEC TRAK only)
- License Types (AEC TRAK only)
- Job Value (AEC TRAK only)

Note: The following TRAKiT reserved words cannot be used in your configurable component titles: FEE, VOID, and PERMIT.

Record Types

Records types are defined in the **Module Configuration** section.

Adding a Record Type

1. Go to Module Configuration > Module > Module Types > Types List
2. Click Add and enter a name or title for the record.
3. (Optional) Enter the Department Ownership (the default is All Departments). The Department Ownership feature provides the ability to limit the ability to create a record type to a single department. For more information about the Department feature, see “Departments.”
4. (Optional) Select Edit if you want to limit which users, by department, can edit this record type. This feature is used in combination with Department Ownership. For example, a new record type called Work Order is created and assigned to the Public Works department. The Only Department Can Edit feature will require a user to be assigned to the Public Works department in order to edit the Work Order record. The record would appear locked to users of all other departments. For more information about the Department feature, see the chapter “Departments.”
5. (Optional) Select a Default Prefix. The default prefix is used when a record is created, unless it is changed by the user.
6. (Optional) Click Only Prefix. When this feature is enabled the user is not able to select a prefix. The default prefix is used when the record is created.
7. (Optional) Select a General Ledger account number. This feature will assign the selected account number to all fees added to this record type. For information about how to add a General Ledger account number, see “Account Numbers.”
8. (Optional) Click eTRAKiT if this record type is for an online permit, project, or license application.
9. (Optional) Click eTRAKiT GeoType to select one or more geotypes that the applicant can select when applying for an online permit or project.
10. (Optional) Click eTRAKiT AECLicense to define which license a contractor must hold in order to apply for a permit through eTRAKiT. For more information about how to define AEC TRAK License types, see “Master License Types (AEC TRAK only).”
11. (Optional) Enter a Description for the record.

12. (Optional) Reorder the type list as required.

    Note: CRM TRAK only—To set a type as the default, move it to the first position and click **Save**.

13. (Optional—AEC TRAK only) Select Restrict to identify AEC TRAK types where users will be prevented from view attachments. This feature is used in conjunction with the AEC: RESTRICT_VIEW_ATTACHMENTS privilege. For more information about User Privileges, see "User Privileges."

14. (Optional—CRM TRAK only) Select a Default Category for the record type, if required.

Record Overview

Module Configuration > Module > Module Types > Type > Overview

Each record type contains a record overview. The overview is a listing of all of the configurable components for that particular record.

- Click **Print** for a complete list of the configurable components for the active record type.

Configurable Components

Module Configuration > Module > Module Types > Type

Configurable components are the objects that can be associated with a specific record type. Configurable components include: record subtypes, contacts, fees, inspections, reviews, chronology activities, custom screens, and preferences. The majority of the configurable components comprise lists that users make selections from.

Configurable components also include objects that can be automatically inserted into a record at the time the record is created (Reviews, Fees, and Inspections).

Add Configurable Components to a Record Type

This procedure applies to fees, subtypes, status, contacts, and valuations.

1. Expand the record's configurable components list.
2. Click on the title of the component to configure.
3. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.

   Tip: Configurable Components Master lists are also available within the module after the record type list.

4. If an item within a configurable component does not exist, click **Add** to create a new item. This action will add the component to both the type- or subtype-specific list and the master list.

   Tip: At a minimum, the Contacts configurable component should include the OWNER contact type. If this contact type is not included, the OWNER information from GeoTRAK will not be copied to the record.

5. (PermitTRAK only > Type > Status) **Prevent eTRAKiT Payment**—Provides the ability to define which status allows the user to submit payments through eTRAKiT.

Auto-Insert Configurable Items

Reviews, fees, and inspections can be auto-inserted by either the record type or record subtype.

Auto-insert a review, fee, or inspection by record type:

1. Expand the record type.
2. Select the object to auto-insert (i.e., review, fee, or inspection).
3. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.

Auto-insert a review, fee, or inspection by record subtype:

1. Expand the record type.
2. Expand the record subtype.
3. Expand the specific subtype where you want to insert the review, fee, or inspection.
4. Select the object to auto-insert (Auto Fees, Auto Inspections, Auto Reviews).
5. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.

Chronology

The Chronology configurable component provides the ability to present a subset of the master chronology list based on the record type.

Create a subset of the master chronology list for a specific record type:

1. Expand the record's configurable components list.
2. Expand the record type.
3. Click on **Chronology**.
4. Drag existing items from the components **Master** list (on the left) to the list of existing items for the record on the right.

   Tip: Configurable Components Master lists are also available within the module after the record type list.
5. If an item within a configurable component does not exist, click **Add** to create a new item. This action will add the component to both the type-specific list and the master list.

Auto Email by Status

Use this feature to automatically generate emails based on a record's status. Emails are sent when the status of the record is changed manually or by the TRAKiT API. Emails are not sent if the status is changed by a form or report.

To configure TRAKiT to automatically generate emails based on the record status, complete the following steps:

1. Configure TRAKiT's email feature if needed in System Settings, E-mail.
2. Create the email templates by completing the following steps:
   a. Open a new file in Notepad.

b. Type the **SUBJECT** and **BODY** elements. The body of the email template can include the value from any field from the record's primary table. For example, emails for permits can include fields from the Permit_Main table and emails for projects can include fields from the Project_Main table. To insert field data, type the field name in brackets.

   Example:

   ```
   SUBJECT: Permit is ready for pickup
   ```

   ```
   BODY: Permit Number [PERMIT_NO], applied for on [APPLIED], by
   [APPLICANT_NAME], is ready for pickup. Please stop by our office
   during normal business hours to pick up your permit.
   ```

c. Save the file to the following folder on your application server: \\<YourAppServer>\TRAKiT\DOCUMENTS\EMAIL

3. In WUM Module Configuration, navigate to the module and record type you want to work with.
4. Click **Auto Email by Status**.
5. Click **+**.
6. In the **Status** column, select the status that triggers the email.
7. In the **E-mail Template** column, select the email template.
8. In the **E-mail Address(es)** column, type a contact type in brackets (for example, **[applicant]**) or an email address. To send the email to multiple recipients, type a semicolon (;) between email contacts/addresses.
9. Click **Save**.

Workflow (CRM TRAK only)

Module Configuration > CRM TRAK > Issue Types > Type > Workflow

The Workflow feature provides the ability to automatically generate actions when the status of a CRM TRAK record changes. Actions include the ability to send or generate template-based emails or letters; or create a new linked record (permit, project, or case).

Tip: A maximum of five actions may be assigned to any single status.

Define which Status Marks the Record as Completed

1. Open Module Configuration > CRM TRAK > Issue Types > Type > Workflow.
2. Select **This Status Marks Issue as Completed** for one or more statuses. This feature is used in conjunction with the **On Issue Completion, Issues are locked** in CRM TRAK Preferences.

Automatically Send an Email

1. Select Add/Edit Action.
2. Click **New**.
3. Select **Send**.
4. Select **E-Mail** (default).

5. Select **User**, **Complainant**, or **Subject of Complaint**. **User** provides the ability to send an email to one or more TRAKiT users (select **Assign Issue to User (first selected)** to indicate that the first user selected is also the default user for the record). **Complainant** and **Subject of Complaint** provide the ability to insert the name and email address from the respective sections of the CRM TRAK record.
6. Select the email template from the **Using Template File** list. For information about how to create email templates, see “CRM TRAK Email Templates.”
7. (Optional) Select **Prompt before doing action** to allow user to confirm or cancel the action prior to execution.

Automatically Generate a Letter

1. Select Add/Edit Action.
2. Click **New**.
3. Select **Send**.
4. Select **Letter**.
5. Select **User**, **Complainant**, or **Subject of Complaint**. **Complainant** and **Subject of Complaint** provide the ability to insert the name and address from the respective sections of the CRM TRAK record.

Tip: User provides the ability to automatically assign the record to a specific TRAKiT user. To assign the issue, select **Assign Issue to User (first selected)** and select the user from the user list.

6. Select the email template from the **Using Template File** list. For more information about how to create a letter using TRAKiT merge documents see, “Merge Documents.”
7. (Optional) Select **Prompt before doing action** to allow user to confirm or cancel the action prior to execution.

Automatically Create a Permit, Case, or Project

1. Select Add/Edit Action.
2. Click **New**.
3. Select **Create**.
4. Select Permit Violation, or Project.
5. Select the **Prefix**.
6. Select the **Type**.
7. (Optional) Select **Prompt before doing action** to allow user to confirm or cancel the action prior to execution.

Tip: Use **No Action** to indicate the last action based on the current status.

Copy Definitions Feature

This feature provides the ability to easily copy already configured type lists from one module to another. When a type list is selected, the **Copy Definitions** feature appears in the header next to **Save**.

Note: Copied definitions will *append* most existing attributes. Exceptions are **Custom Screens**, **Fees** (**Allowable**), and **Fees** (**Automatic**). These three items are *replaced* when using the Copy Definitions feature.

Copy Type List Definitions

1. Select the **Copy Definitions** button.
2. In the **Copy Definition FROM** field, select the type you want to copy from. For example, in PermitTRAK, select the permit type.
3. In the **Definition to be Copied** list, select the types of settings you want to copy from one type to another type. For example, select **Status Codes**, **Contact Types**, and **Custom Screens**).
4. In the **Copy Definitions to** list, select the types you want to copy to.
5. Click **Save**.

System Preferences by Record Type

(PermitTRAK & ProjectTRAK only.) PermitTRAK provides the ability to define System Preferences at the record type level.

Enable or disable a system preference:

1. Open Module Configuration > PermitTRAK > Permit Types > Select specific permit type > Preferences.
2. Select Triggers, Restrictions, or Date Settings.
3. Confirm that you want to add type-specific preferences.
4. Select or deselect preferences as required.

For an explanation of the specific preferences, see “PermitTRAK.”

Note: Any preference enabled or disabled in this section applies only to this specific permit type.

Remove type-specific System Preferences:

1. Open Module Configuration > PermitTRAK > Permit Types > Select specific permit type > Preferences.
2. Select Triggers, Restrictions, or Date Settings.
3. Click **Revert** on the toolbar.
4. Confirm the removal of the type-specific preferences.

System Preferences by Record Type (CodeTRAK only)

CodeTRAK provides the ability to define the following System Preferences at the record type level.

The **Hide Chronology** and **Hide Contacts** feature provides the ability to hide or remove from the view the chronology or contacts panel except for the designated department.

To define the department that can view either the Chronology or Contacts pane, select the department from the drop-down list.

Master Subtypes List

Add an item to the Master Subtypes list:

1. Click **Add** and enter a title.
2. (Optional) Reorder the list.

To delete an item from the Master Subtypes list, click Delete.

Master Status List

Add an item to the Master Status list:

1. Click **Add** and enter a status.
2. (Optional) Select **Parcel Lock** if you want the status to lock the attached GeoTRAK record. For additional information about configuring record lock, see "GeoTRAK Record Lock."
3. (Optional) **For Use with CRM TRAK Only.** Select a CRM TRAK status. This feature is used when a CRM TRAK issue is linked to permit, project, or case record and you want to automatically change the CRM TRAK status when a specified permit, project, or case status is selected.

   Note: To set a status as the default, move it to the first position and click **Save**.
4. (Optional) Reorder the list.

To delete an item from the Master Status list, click Delete.

Master Categories List (CRM TRAK only)

Module Configuration > CRM TRAK > Categories

Add an item to the Master Categories list:

1. Click **Add** and enter a title.
2. (Optional) Reorder the list.

To delete an item from the Master Subtypes list, click Delete.

Master Created Via List (CRM TRAK only)

Module Configuration > CRM TRAK > Created Via

Add an item to the Master Created Via list:

1. Click **Add** and enter a title.
2. (Optional) Reorder the list. **Note:** To set the default item, move it to the first position and click **Save**.

To delete an item from the Master Subtypes list, click Delete.

Master Status List (CRM TRAK only)

Module Configuration > CRM TRAK > Status List

Add an item to the Master Status list:

1. Click **Add**.
2. Enter a title.
3. (Optional) Reorder the list.

To delete an item from the Master Subtypes list, click Delete.

Master Chronology List

Add an item to the Master Chronology list:

1. Open Module Configuration > Module > Chronology.
2. Click **Add**.
3. Enter a title.
4. (Optional) Reorder the list.

To delete an item from the Master Chronology list, click Delete.

Master License Types (AEC TRAK only)

Module Configuration > AEC TRAK > License Types

This list supports eTRAKiT's ability to associate a license type with a specific permit type. When enabled, a contractor applying for a specific permit type through eTRAKiT, must hold an associated license type.

To add an item to the Master License Types list:

1. Click **Add**.
2. Enter a title.
3. (Optional) Reorder the list.

To delete an item from the Master License Types list click **Delete**.

For information about associating a license type with a permit type, see the option to set **eTRAKiT AECLicense** types.

> **Note**: License types are added to the AEC TRAK record in the License Information pane.

Master Job Value (AEC TRAK only)

Module Configuration > AEC TRAK > Job Value

This list supports eTRAKiT's ability to set a maximum job value per AEC TRAK record.

To add an item to the Master Job Value list:

1. Click **Add**.
2. Enter an amount or the word UNLIMITED. This amount represents the maximum job value. UNLIMITED will allow the applicant to enter any job value when applying for a permit through eTRAKiT.
3. (Optional) Reorder the list.

To delete an item from the Master Job Value list, click **Delete**.

> **Note**: This feature must be enabled in eTRAKiT. The eTRAKiT configuration also provides the ability to define the message that is display if an applicant exceeds the job value limit.

> **Note**: The maximum job value is set on the AEC TRAK record in the License Information pane.

Custom Screens

Use the Custom Screens feature to design templates where users can enter jurisdictional-specific data. Custom screens are available in the following modules and functional areas:

- GeoTRAK
- PermitTRAK
- ProjectTRAK
- CodeTRAK
- LicenseTRAK
- Bonds
- Conditions
- Inspections
- Violations

You can add a maximum of nine 10-field layout screens and nine 12-field layout screens per record type. This means that any one TRAKiT record type can have a maximum of 18 custom screens with a maximum of 244 custom fields.

The location of the **Custom Screens** group varies by module and functional area. For most modules, custom screens options are under each record type. For example, in LicenseTRAK, select **License Types**, then select a specific license type, and then select **Custom Screens**. For functional areas, select the module, then the functional area, then the **List** page. For example, to manage custom screens related to inspections in PermitTRAK, select PermitTRAK, then **Inspections**, and then select **Inspections List**.

Defining custom screens requires two steps:

1. Define the data fields.
2. Design the data input template.

Adding Data Fields

To add a data field, complete the following steps:

1. If you are adding a data field to a module record type: In the navigation pane, select **Types**, select a specific record type, select **Custom Screens**, and then **Data Fields**. For example, select **PermitTRAK**, **Permit Types**, **Plumbing**, **Custom Screens**, **Data Fields**.

   If you are adding a data field to a functional area: In the navigation pane, select the functional area and then the **List** page. For example, select **Inspections**, **Inspection List**.
2. For functional areas only, the icon in the UDF column.
3. Click **✚**.
4. Enter a data field name. Observe the following rules when creating field names:
   - Do not use names longer than 24 characters.
   - Use only a–z, A–Z, 0–9 and the underscore (other characters, including space, are not allowed).

- Do not start a name with a number.

  Tip: If the field name is more than one word, you must place an underscore (_) between the words (e.g.,DEFAULT_INSPECTOR)

5. Select the field type. The options are:
   - TEXT: Alphanumeric data, including special characters. Maximum 8000 characters.
   - DATE: Date, which users can select from the calendar icon on the custom screen. Date and time data from January 1, 1753, through December 31, 9999 is valid, with an accuracy of three-hundredths of a second, or 3.33 milliseconds.
   - INTEGER: Integer (whole number) data from -2^31 (-2,147,483,648) through 2^31 - 1 (2,147,483,647).
   - FLOAT: Floating precision number data with the following valid values: -1.79E + 308 through -2.23E - 308, 0 and 2.23E + 308 through 1.79E + 308.
   - MEMO: Text field that stores data that exceeds 2000 characters in length in the MEMOS table (e.g., Permit_Memos, Project_Memos, Case_Memos, etc.). Use this field type for text fields that exceed the 8000 character maximum or when you want the data to be displayed in a notes or memo window instead of a text box.
   - BOOLEAN: Check box. Data is stored in TRAKiT as a 0 or 1.

     Tip: If you anticipate using a boolean field in a report or merge document and you do not want the data to display as 0 or 1, use a text field that has an associated picklist (i.e., Yes or No) instead.
6. For text fields, set the **Size** field to the maximum number of characters you want to allow in the field. The default for text fields is 60 characters.
7. Click **Save**.

Warning! If you delete a custom screen field, TRAKiT deletes the associated data.

Design the Screen

To add a custom screen, complete the following steps:

1. Click **Add Custom Screen**.

   Tip: If a record type already has 18 custom screens, the **Add Custom Screen** button does not appear.
2. Select the custom screen layout. TRAKiT enables you to create a custom screen with either 10 or 12 fields.

   Note: A record type can have a maximum of nine 10-field layout screens and nine 12-field layout screens.
3. In the **Screen Label** field, type a title for the custom screen.

   Tip: If you want the screen to be available to eTRAKiT users, type eTRAKiT as the first word in the title.
4. For each data field on the screen:
   - Enter a caption. The **Caption** field size is 24 characters.
   - Select the **Database Field Name**. Custom fields are located at the bottom of the list and have the number **2.** in front of the field name (e.g., 2.COAST_ZONE).

- Use ▼ and ▲ to arrange the order of the fields.

5. Select from the following options as required:
   - Select **Read Only** for data that is for information only.
   - Select **Options** to create a pick list or autogen number.

Create a pick list:

1. Select **Options** next to the field.
2. Select **Pick List**.
3. Select ✚.
4. Type the text for the pick list item.
5. Repeat as needed.

   Tip: To reorder the pick list, drag a row to a new position.
6. Select **OK**.

Tip: Create multiple pick lists in one step by entering the items separated by commas and saving.

Create an autogen (auto-generated) number:

1. In **System Settings**, add the auto-generated number.
2. In the navigation pane, select Module Configuration, *module*, Types, Custom screens, and then select the custom screen you want to work with.
3. Select ⚙ for the field you want to work with.
4. Select **AutoGen**.
5. In the unlabeled drop-down field, select the title of the autogen number you added in step 1.
6. Select **Save**.

Tip: To remove or clear a field definition, click **Reset Data Field**.

Tip: Deleting a custom screen removes the screen only. Deleting a custom screen *does not* delete the associated field or the associated data.

Tip: Contractor passwords are not viewable from the Company Information Pane unless the System Administrator adds it as a custom screen. Users can view and edit contractor passwords once they are added as a custom screen.

Valuations

Valuations stores and manages the information required to calculate and track the job value of a record in PermitTRAK. Once valuations are set up, they must be associated with specific PermitTRAK record types. Set up valuations using the following procedures:

- Creating valuations
- Editing valuations
- Deleting valuations

Create a Valuation

1. Open Module Configuration > PermitTRAK > Valuations.
2. Click **Add**.
3. Enter a **Valuation Code** (maximum 12 characters). Valuation codes must be unique.
4. Enter a **Description** of the valuation calculation (maximum 40 characters).
5. Enter a **Unit Cost**.
6. Select the unit of measure from the **Units** drop-down list.

For additional units of measure, see **In Valuations, use Permit building square footage as quantity when SF or SQ units selected (PermitTRAK)**.

7. (Optional) If the valuation is a subvaluation, select the valuation category from the **Sub-Valuation of** drop-down list.
8. Associate the new valuation(s) with specific permit type(s), as applicable.

Add a Valuation Category

1. Open Module Configuration > PermitTRAK > Valuations.
2. Click **Add**.
3. Enter a Valuation Code (maximum 12 characters). Valuation codes must be unique.
4. Enter a category title in **Description** (maximum 40 characters).
5. Select **DET** from the **Units** drop-down list.

Tip: Double-click a valuation in the master list to edit the properties.

Valuation Options

Expand Valuation Schedule tree when inserting New Valuations: This preference will automatically expand each node in the valuation schedule when the user opens the valuations schedule screen.

Enable Model Home Templates: This preference enables functionality or streamlining user workflow with model home permits and projects using model home templates. Templates are configurable according to builders, models, and base and optional valuations.

1. Select preference to enable functionality.
2. Create new valuations by selecting Add and entering the Valuation Code, Description, Unit Cost, Units (EA), Sub-Valuation (if any) and selecting Save. Units must be specified as **EA** to be used with the Model Home Template feature.

Tip: Additional Administrator options for setup (Configure Model Homes & Admin Options) are available in the TRAKiT interface on the **Valuations** pane. Instructions for use are included in the *TRAKiT User Guide*.

Fees

Fees stores information used to calculate, assess, and collect fees and deposits in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, and AEC TRAK. Once fees are set up, they must be associated with specific record types in PermitTRAK, ProjectTRAK, and CodeTRAK.

Set up fees using the following procedures:

- Add a Fee Schedule
- Add Fee Formulas
- Add Fee Definitions
- Edit Fee and Deposit Definitions
- Delete Fee and Deposit Definitions
- Maintain Lookup Tables
- Configure Module-Specific Fee Preferences

Fee Schedule

Use the Fee List page to enter multiple changes to a fee schedule and assign an effective date that the changes are available in TRAKiT.

Add a Fee Schedule

1. Open Module Configuration > Module > Fees > Fees List.
2. Click ✚ next to the Schedule Name field.
3. Enter a schedule name for the new schedule and click **Save**.
4. (Optional) Select an existing fee schedule to copy.
5. Enter an **Effective Date** (date TRAKiT begins using the fee schedule).
6. Add, change, or delete fees or deposits as needed.

Note: This action adds a fee schedule for all TRAKiT modules. TRAKiT can have only one active fee schedule. Only one non-test fee schedule can have a specific effective date.

Delete a Fee Schedule

1. Open Module Configuration > Module > Fees > Fees List.
2. Select the fee schedule from the **Schedule Name** list.
3. Click **Delete** next to **Schedule Name** and **OK** to confirm.

Edit a Fee Schedule Title

1. Open Module Configuration > Module > Fees > Fees List.
2. Select the fee schedule from the **Schedule Name** list.
3. Click Edit next to Schedule Name.
4. Enter the new name and click **Save**.

Test Items in a Fee Schedule Prior to the Effective Date

1. Open Module Configuration > Module > Fees > Fees List.
2. Select a fee schedule from the **Schedule Name** list.
3. Select **Test**.

Note: Fee schedules that are marked as **Test** are available in the client application. This provides the jurisdiction the ability to test fees that rely on additional data, such as custom fields.

Test a Fee Item in TRAKiT

1. Open the appropriate Financial pane in TRAKiT.
2. Click **Add Fees** and click on the fee schedule name.
3. (A warning message appears.) Click **OK** and select the appropriate fee schedule.

Adding Fee Formulas

Fee formulas determine how a fee amount is calculated in TRAKiT. Fee amounts may be entered by users, assessed as flat fees, based on database fields, tiered rate schedules, other fees, or subfees, or established as a minimum for a record. Formulas may be entered in individual fee definitions or stored in text files (required for formulas that exceed 50 characters in length).

You must use parentheses to define the calculation order of mathematical fee formulas. TRAKiT calculates the innermost parentheses first. If no calculation order is specified by parentheses, fee formulas are calculated left to right, not by mathematical rules.

Fee Formula Elements

- Floating point numbers—decimals as flat amounts or part of a mathematical calculation
- **+**, **-**, *****, **/**—standard, four function operators as part of a mathematical calculation
  - **QTY**—quantity entered by user in the Fee Details screen of each application
  - **MIN(***Value1***,** *Value2***)**—function that returns the minimum of two values (*Value1* and *Value2*, may be calculated values) as part of a mathematical calculation
  - **MAX(***Value1***,** *Value2***)**—function that returns the maximum of two values (*Value1* and *Value2*, may be calculated values) as part of a mathematical calculation
  - **INT(***Value1***)**—function that truncates a decimal (*Value1*, may be calculated values) and returns an integer as part of a mathematical calculation
  - Float or integer fields in UDF tables—any fields with a data type of float or integer in user-defined tables (AEC_UDF, License_Business_UDF, License_UDF, Case_UDF, Permit_UDF, Project_UDF)
  - (PermitTRAK only) Certain float fields in Permit_Main, using reserved keywords:
    - **BLDGSF**—Permit_Main.BLDG_SF; no standard entry in PermitTRAK, but may be included on custom screens if desired
    - **BLDG2SF**—Permit_Main.BLDG2_SF; no standard entry in PermitTRAK, but may be included on custom screens if desired
    - **JOBVALUE**—Permit_Main.JOBVALUE; calculated on the Valuation Details screen

- **UNITS**—Permit_Main.NO_UNITS; no standard entry in PermitTRAK, but may be included on custom screens if desired
- **GARSF**—Permit_Main.GAR_SF; no standard entry in PermitTRAK, but may be included on custom screens if desired
- **GAR2SF**—Permit_Main.GAR2_SF; no standard entry in PermitTRAK, but may be included on custom screens if desired
- **BLDGS**—Permit_Main.NO_BLDGS; no standard entry in PermitTRAK, but may be included on custom screens if desired

Note: For more information about adding Custom Screens, see "Custom Screens."

- **[ITEMIZE]**—fee categories where the fee amount is the sum of the selected subfee items (may be calculated values)
- **[*TableName*]**—lookup tables (*TableName*) for tiered rate schedules. Note that the table name must be enclosed in brackets.
- **{*FeeCode*}**—other fees in the fee schedule (*FeeCode*). Note that the fee code must be enclosed in braces { }.
- **[MINIMUM:***Minimum Fee***]**—establishes a minimum fee (*MinimumFee*) for a record. The fee item is reduced as fees are assessed, until the minimum charge is met or exceeded.

Sample Fee Formulas

The following table shows examples of common fee formulas.

Description	Fee Formula
Direct fee that is entered by the user	Leave formula blank
Flat fee—$15 issuance fee	15
Fee based on a unit price, where user enters the item count in the Quantity field—$10/each	QTY * 10
Fee based on a lookup table—building fee based on look up table 3-A	[3-A]
Fee based on a modified lookup table—plan check fee based on 65 percent of building fee	[3-A] * .65
Fee based on total of all subfee items—ELECTRICAL fee category, where charges are assessed for individual components, each with their own formula	[ITEMIZE]
Fee based on a minimum amount—fee is assessed as either the amount entered or $15, whichever is greater.	MAX(15,QTY)

Description	Fee Formula
Fee based on a maximum amount—fee is assessed as either the amount entered or $15, whichever is less.	MIN(15,QTY)
Fee based on another fee item—plan check fee that is adjusted by a deposit (fee code: DEPOSIT) collected at application	[3-A] * .65 - {DEPOSIT}
Fee based on a graduated rate—electrical wall switches charged at a rate of $1/each for the first 10, then $.75/ each in excess of 10	(MIN (QTY, 10) * 1) + (MAX (QTY-10, 0) * .75)
Fee based on a graduated rate with a minimum fee— electrical wall switches charged at a rate of $10 for one to five switches and an additional $.75 for each switch thereafter	10 + (MAX (QTY-5, 0) * .75)
Fee based on a graduated rate with a maximum fee— electrical wall switches charged at a rate of $.75/each up to a maximum fee of $ 15	MIN ((QTY*.75), 15)
Fee based on a percentage of other fees—plan check fee charged as 75 percent of the combined Electrical, Mechanical and Plumbing fees (fee codes: ELEC, PLUMB, MECH)	({ELEC} + {PLUMB} + {MECH}) * .75
Fee based on permit data—building fee based on a percentage of the job valuation (sum of all valuations on permit). PermitTRAK fields that can be used in fee calculations include (data is entered into these fields via Custom Screens): • BLDG_SF • BLDG2_SF • GAR_SF • GAR2_SF • NO_BLDGS	JOBVALUE * .05
Fee based on Custom Screen field (must be of type integer or float)—fee based on the number of acres as defined on a Custom Screen.	ACRES*15
Fee based on user-defined database fields—housing development plan check fee based on the number of lots (database field: Project_UDF.NO_LOTS)	1300 + (NO_LOTS * 100)

Description	Fee Formula
Fee based on a minimum amount for the permit. This fee displays as the difference between the total of all fees on the permit and $50. For example, if the total of all fees on the permit is $35. This fee would display as $15.	[MINIMUM:50]
Fee based on a whole number—fee is calculated as the job value divided by 100. For example, the fee for a job value of $20,540.35 is $205	INT(JOBVALUE/100)
Fee based on a tier—fee is calculated based on a defined tier. For example: Job Value = 0 to 99.999999 - Fee is $0 Job Value = 100 to 199.999999 - Fee is $5.52 Job Value = 200 to 299.999999 - Fee is $11.04	INT(JOBVALUE/100)*5.52

Adding Fee Definitions

Tip: CentralSquare recommends that you set up your standard account numbers, lookup tables, and stored fee formulas before creating fees.

Add a Fee in your System Setup

1. Open Module Configuration > Module > Fees > Fee List.
2. Click **Add**.
3. Select **Fee-** or **Bond-Specific** from **Item Type**.

   Note: Bond Specific provides the ability to insert fees on the bond pane.
4. Enter a code for the fee. The fee code must be unique and not exceed 12 characters in length. The fee code can consist of both letters and numbers (e.g., BLDGPERM0001).
5. Enter a **Description** (maximum of 40 characters). The description is the title of the fee the user sees in TRAKiT client.
6. (Optional) Select an **Account Number**.
7. (Optional) If the fee item is part of a fee group, select the group from the **Sub Fees** menu.
8. Enter the fee **Formula** and click **OK**.

Tip: Test your formula by entering a value in the **Test Formula** dialog box. For example, to test the formula QTY*5, click **Test Formula**, enter a test value (e.g., QTY=10), click **OK**.

Lookup Tables

Lookup tables allow you to define tiered rates for fees. Fee formulas can be calculated based on lookup tables.

Maintain Lookup Tables in your System Setup

Open Module Configuration > Module > Lookup Tables.

1. Select the **Table Name** to edit or click **Add** to create a new Lookup Table.
2. Enter or edit the tables description (this is for internal use only).
3. Select the field on which the fee is based from the drop-down list (JOBVALUE, BLDGSF, GARSF, UNITS, BLDGS, QTY) or type in the Custom Screen field name (do not include the 2.).
4. Enter values into the table.

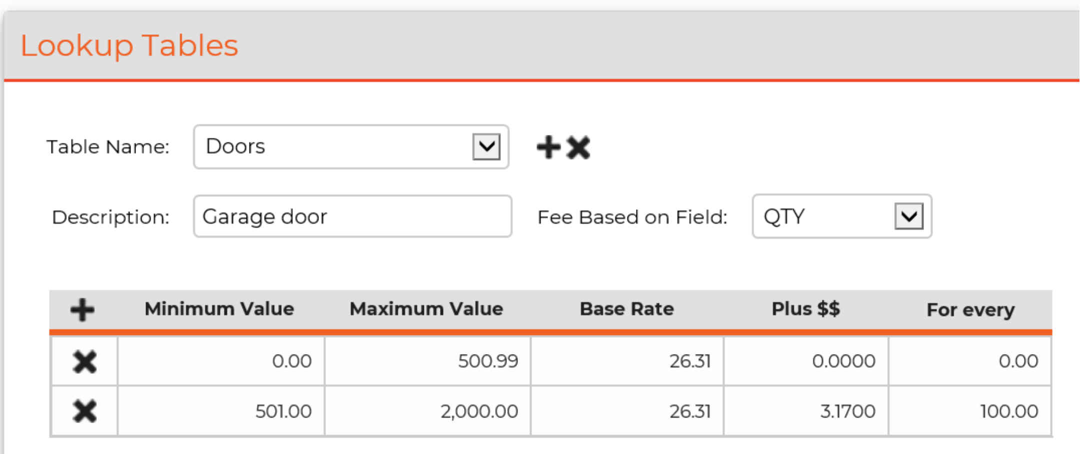
How to Read a Lookup Table

The Lookup table feature is designed based on language written by the building code governing bodies. Here is an example of this language:

> $26.31 for the first $500, plus $3.17 for each additional $100, or fraction thereof, to and including $2000.

This language translates to the following TRAKiT Lookup Table headers:

> <Base Rate> for the <Maximum Value> of the last row, plus <Plus $$> for each additional <for every>, or fraction thereof, to and including <Maximum Value>.
>
> Unless <for every> value is 0, the fee at the <Minimum Value> is **NOT** equal to the <Base Rate>. At the <Minimum Value>, the fee is calculated by the <Base Rate> plus 1 times the <Plus $$>.



In the example:

If the job value is…	then the fee is…
$0	$26.31
$100	$26.31

In the example:

If the job value is…	then the fee is…
$501	$29.48
$601	$32.65
$750	$35.82
$2000	$73.86
$2001	$0

Fee Preferences

Set Fee Preferences for a Module

1. Open Module Configuration > Module > Fees > Preferences.
2. Enable one or more preferences by either selecting the box or item from the drop-down menu. The following is an explanation of the Fee Preferences:

- **Prevent ISSUE before all FEES are paid (PermitTRAK)**—The Issued Date on the PermitTRAK Information pane is disabled if any fee on the record has an amount greater than zero.
- Enable paid date (Descending) as the default sort order in Fee Payment Details (LicenseTRAK)—Defines the Paid Date as the field that determines the order in which the fees are displayed.
- **Prompt for setting Expiration date to end of year (AEC TRAK)** -Prompts user to confirm the automatic setting of the **Expires** date in the **Company Information** pane to December 31 of the current year.
- **Prompt for setting Expiration date to specific date** (AEC TRAK)—Prompts user to confirm the automatic setting of the **Expires** date in the **Company Information** pane to the date selected in the preference.
- Prompt for setting the Business License 1 Expiration to specific date (AEC TRAK)—Prompts user to confirm the automatic setting of the Agency 1 Expires date in the License Registration pane to the date selected in the preference.
- **Default Contact Type for Fees Paid By** (PerimtTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)—Displays the name field from the **Contacts** pane of the selected Contact type. For example, if Joe Applicant is the name listed on the APPLICANT contact type and you select APPLICATION as the Default Contact Type for Fees Pay By, Joe Applicant will be the default name displayed on fees payment screen.
- **Receipt Numbers AutoGen Name** (PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LicenseTRAK)—Defines the AutoGen number used on the receipt. Manually add a receipt number by selecting *<none defined>*.

- In Valuations, use Permit building square footage as quantity when SF or SQ units selected (PermitTRAK):
  - Default behavior (without this preference enabled). The number of units for EA, LF, SF, and SQ are entered into the quantity field of the valuation and stored in the quantity field in the related Valuations table. For more information about adding valuations, see “Adding a Valuation.”
  - With this preference enabled and the valuation defined using SF or SQ as the unit of measurement. TRAKiT will obtain and store the unit of measurement in the BLDG_SF field located in the Main table. The quantity field in the Valuations pane is disabled.

Additionally, with this preference enabled, the following fields are available: BLDG2_SF, GAR_SF, GAR2_SF, LOT_SF, PORCH_SF, PORCH2_SF, plus any user-defined float field from the PermitTRAK module. The quantity field in the Valuations pane is disabled. To use this option, a Custom Screen is created that contains one or more of the fields. The user enters the units into the custom screen, which is then used in the valuations calculations. For more information see “Custom Screens.”

Warning: User-defined float fields cannot exceed a field size of 6 characters when used in calculating valuations.

Invoicing

To enable the invoicing feature, use the options in System Settings > Accounting > Invoices.

If you want to use autogenerated (autogen) numbers for invoices, add an entry in the AutoGen Numbers table. See “Autogen Numbers” for more information.

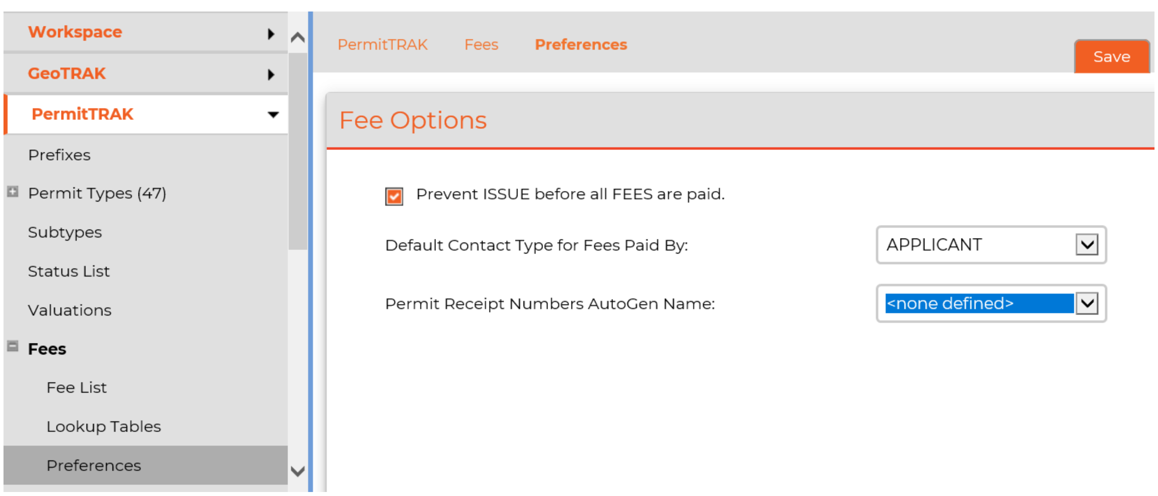
Cashiering Receipts

There are two types of cashiering receipts: manual entry for individual receipts and autogenerated (autogen) numbering for multiple receipts.

Using Manual Receipt Numbers

module > Fees > Preferences

The user can enter a manual prefix for a receipt when the **Receipt Numbers AutoGen Name** option is set to **<none defined>**. This option is available in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, and AEC TRAK.



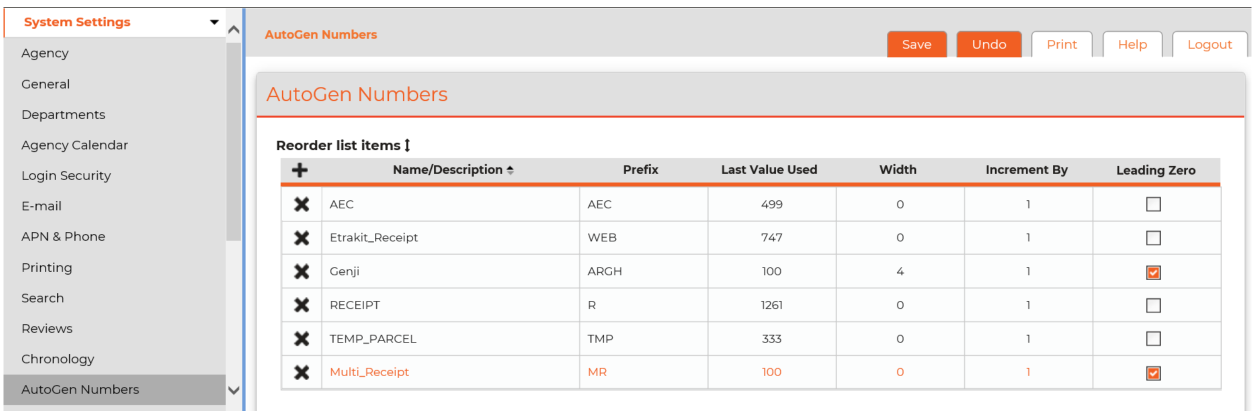
Using Autogen Receipt Numbers

When two items from different modules are selected to be paid at the same time, the receipt number is based on Multi_Receipt settings.

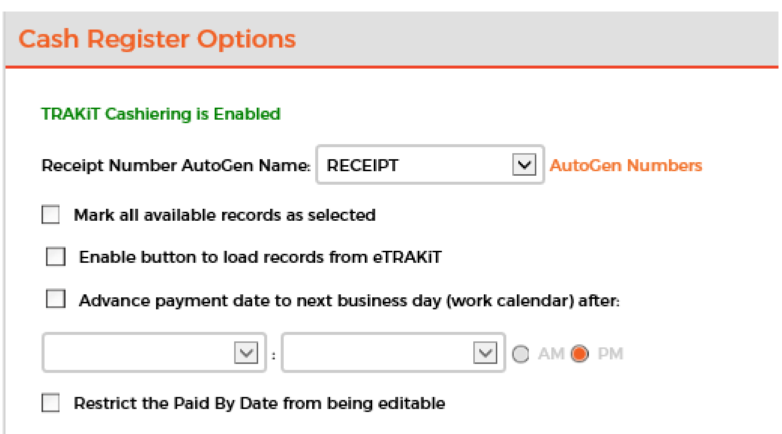
> **Note**: If you want to use this feature, cashiering must be enabled in your database.

To use Multi_Receipt receipt numbering, complete the following setup:

1. Navigate to System Settings > AutoGen Numbers.
2. Add an item for **Multi_Receipt**. Type values for the **Prefix**, **Last Value Used**, **Width**, and **Increment By** options. Select the **Leading Zero** option if you want the receipt numbers to include leading zeros.
3. Click **Save**.



4. Navigate to System Settings > Accounting > Payments > Cashiering.
5. In the **Cash Register Options** section, select **Multi_Receipt** in the **Receipt Number AutoGen Name** field.
6. Click **Save**.



Deposits

Deposits provides the capability of collecting funds on a record that can then be used to pay fees as they are incurred.

Adding Deposit Definitions

Tip: CentralSquare recommends that you set up standard account numbers before deposits are created.

Add a Deposit in your System Setup

1. Open Module Configuration > *module* > Fees > Fee List.
2. Click **Add**.
3. Select **Deposit** from **Item Type**.
4. Enter a code for the deposit. The deposit code must be unique and not exceed 12 characters in length. The deposit code can consist of both letters and numbers (e.g., PLANREVDEP01).
5. Enter a **Description** (maximum of 40 characters). The description is the title of the deposit the user sees in TRAKiT client.
6. (Optional) Select an **Account Number**.
7. Enter the deposit amount in the **Formula** field. Deposit amounts are either fixed (e.g., $5,000) or manually entered by the user.
8. Click **OK**.

Note: Deposits cannot be a part of a group or have subfees.

Tip: Deposits appear in blue on the fee schedule and must be associated with a specific record type in the application setup for PermitTRAK, ProjectTRAK, CodeTRAK, or AEC TRAK.

Tip: For more information about Deposits System Settings, see System Settings, “Deposits.”

Tip: The deposits feature can be combined with TimeTRAK to automatically create a fee that reduces or draws down the deposit as fees are incurred through the review, inspection or chronology activity features. For more information about TimeTRAK, see “TimeTRAK.”

Bonds

Adding Bond Definitions

Add a Bond in your System Setup

1. Open Module Configuration > PermitTRAK or ProjectTRAK > Fees > Fee List.
2. Click Add.
3. Select Bond from Item Type.
4. Enter a code for the bond. The bond code must be unique and not exceed 12 characters in length. The bond code can consist of both letters and numbers (e.g., ENCRBND01).
5. Enter a Description (maximum of 40 characters). The description is the title of the deposit the user sees in TRAKiT client.

6. (Optional) Select an Account Number.
7. Enter the bond Formula.
8. (Optional) Enter the minimum percentage a bond can be reduced.
9. (Optional) Enter the maximum bond reduction that can occur within a 12-month period.
10. (Optional) Select a Bond Explanation.

Tip: Bond Explanations are PDF files that can be linked to a specific bond. These files are stored in //file server/bin32.

11. Click OK.

Note: Bonds cannot be a part of a group or have subfees.

Tip: Bonds appear in green on the fee schedule and must be associated with a specific record type in the application setup for PermitTRAK or ProjectTRAK.

Tip: For more information about System Settings, see “Bonds.”

Tip: Custom screens can be used to track bond-specific information. For more information about creating custom screens, see “Custom Screens.”

Print Queue

Print Queue defines the document(s) that are available from the Print feature in the Bonds pane.

To define the list of available documents, place the documents/reports that users will print in the **//<app server>/ Documents/<Module Name>/BONDS** folder.

Reviews

Reviews stores information used to track reviews in PermitTRAK, ProjectTRAK, and LicenseTRAK. Set up reviews using the following procedures:

- Adding Review Types
- Editing Review Types
- Deleting Review Types
- Grouped Reviews
- Defining the Reviewers List
- Defining Status Codes for Reviews
- Adding Standard Notes for Reviewers

Adding Review Types

Add a Review Type in your System Setup

1. Open Module Configuration > *module* > Reviews > Reviews List
2. Click **Add**.
3. Type a name for this review in the **Review Name** field (maximum of 20 characters).
4. Type a description of this review in the **Review Description field** (maximum of 60 characters).

5. In the **Default Reviewer** field, select the name of the person you want assigned to this review type when a review of this type is added.

   Note: You can change the default reviewer manually for individual reviews if necessary.

6. In the **Alternate Reviewer** field, select the name of the person you want to complete the review if the default reviewer is not available.

   Note: If both the default reviewer and alternate reviewer are unavailable, the review is assigned to the alternate reviewer.

7. In the **Email Address for Alert Email if Reviewer(s) unavailable** field, type the email address of the person to receive an email if the default and alternate reviewers are both unavailable.

8. If another review is a prerequisite to the review you are adding, select the prerequisite review type in the **Required Previous Review** field. Users cannot schedule the review until the prerequisite review is passed.

9. Enter the number of days after the review is added that the review is due in the **Default Due Date aging from 'Sent Date' field**. If you type a value, then the review due date is set automatically when the review is added to the record. The default setting for this feature is **Calendar Days**.

10. **Exclude from Approval Trigger—**Depending on your system preferences, TRAKiT may automatically set a record to Approved status when all reviews are set to a certain status. To exclude this review from the record approval, select this option. To require this review for record approval, clear this check box. For more information about how to automatically set the Approved date, see "Review Preferences."

11. Use fields in the **Automatic Next Review** section to specify a review that will be added automatically to the record after this review is assigned a specified status:

    a. In the **When this status is set** field, select the status that the new review must be assigned before the next reviews are added.

    b. In the **Insert this Review** field, select the review to add.

12. Click **Save**.

(Optional) Set up an Automatic Next Review

1. Select one or more status codes to trigger the next review.
2. Select the review to insert.

Editing Review Types

Edit a Review Type in your System Setup

1. Open Module Configuration > Module > Reviews > Reviews List
2. Double-click the review you want to edit or edit the review properties directly in the grid.

   Note: The dialog box that appears when you double-click the review contains more options than the grid.

Deleting Review Types

Delete a Review Type from your System Setup

1. Open Module Configuration > Module > Reviews > Reviews List
2. Click **Delete** next the review that you want to remove from your setup.

Tip: If this review is automatically added to a new record, remove the review from each record type in your record's configurable components.

Grouped Reviews

To facilitate review scheduling and reporting, you can organize review types into groups (e.g., City, County, State, or 1st Submittal, 2nd Submittal etc.).

Adding a Group

1. Open Module Configuration > Module > Reviews > Grouped Reviews
2. Click **Add** next to the **Group** drop-down list.
3. Enter a **Group Name** (maximum of 12 characters) and then click **Save**.

Editing a Review Group Title

1. Open Module Configuration > Module > Reviews > Grouped Reviews.
2. Select the **Group**.
3. Click **Edit** and enter the new review group name.
4. Click **Save**.

Deleting a Review Group

1. Open Module Configuration > Module > Reviews > Grouped Reviews.
2. Select the **Group**.
3. Click **Delete**.
4. Click **OK**.

Adding a Review to a Group

1. Open Module Configuration > Module > Reviews > Grouped Reviews.
2. Select the **Group**.
3. Select one or more reviews from the **Master Reviews List** and drag them to the **Review Group** list.
4. (Optional) Reorder as required.

Deleting a Review from a Group

1. Open Module Configuration > Module > Reviews > Grouped Reviews.
2. Select the **Group**.

3. Click **Delete** next to the review item **Review Group** list.
4. (Optional) Reorder as required.

Tip: The default TRAKiT Review pane consists of the following columns: Review Type, Reviewer, Sent Date, Due Date, Returned Date, Status and Remarks. This feature provides you with the capability of tracking the number of submittals for a record.

Defining the Reviewers List

Define the Reviewer Drop-Down List within each TRAKiT application

1. Open Module Configuration > Module > Reviews > Reviewers
2. Select one or more users from the **Master Users List** and drag them to the **Reviewers** list.
3. (Optional) Reorder as required.

Delete a User from the Reviewers List

1. Open Module Configuration > Module > Reviews > Reviewers
2. Click **Delete** next to the reviewers name in the **Reviewers** list.
3. (Optional) Reorder as required.

Tip: To quickly add a new user account, click the **Master User List Add** button. For more information about User Accounts and Privileges, see "User Preferences."

Tip: Reviewers should have a TRAKiT User account. Consider adding outside reviewers (e.g., other government agencies) as TRAKiT users with limited privileges. Though it is not recommended, it is also possible to add a reviewer that is not a TRAKiT user by clicking the **Reviewers List Add** button. However, these reviewers are not granted access to TRAKiT and cannot enter results. Furthermore, reports and historical data may be incomplete since the reviewers' full names are not referenced in the User Accounts section.

Defining Status Codes for Reviews

Define the Review Status Drop-down List

1. Open Module Configuration > Module > Reviews > Status List and click Add.
2. Enter the review status (maximum 30 characters)
3. (Optional) Select **Set Returned Date**. This feature automatically sets the returned date to the current date when the status is selected (no user prompt).
4. (Optional) Select **Prompt**. This feature prompts the user to confirm the setting of the returned date when the status is selected.
5. (Optional) Reorder as required.

Edit a Review Status

1. Open Module Configuration > Module > Reviews > Status List
2. Click the field next to the status that you wish to change.

Delete a Review Status

1. Open Module Configuration > Module > Reviews > Status List
2. Click **Delete** next to the review.

Adding Standard Notes for Reviewers

Standard notes are predefined list of frequently used comments for reviews that can speed up data entry. They are in the Notes screen of reviews.

Adding a Standard Notes for Reviewers

1. Open Module Configuration > Module > Reviews > Standard Notes
2. Select a reviewer's name or All Reviewers.
3. Click **Add**.
4. Enter the comment/note in the **Standard Note** field.
5. Select whether this Standard note is available for all review types or one specific review type.
6. (Optional) Reorder as required.

Delete a Standard Note

1. Open Module Configuration > Module > Reviews > Standard Notes
2. Select a reviewer's name or All Reviewers.
3. Click **Delete** next to the Standard Note.

Copy a Standard Note to one or more Reviewers

1. Open Module Configuration > Module > Reviews > Standard Notes
2. Select a reviewer's name.
3. Select the note to copy.
4. Click Copy Notes to Another User.
5. Select one or more users.
6. Click **Save**.

Review Preferences

The following are module-specific preferences associated with reviews:

- **Copy Review Dates on Permit Duplication** (PermitTRAK): This feature includes the Review's Date Sent, Date Due, and Date Returned on the duplicated permit record.
- **Enable email messagebox when sending automatic emails for reviews** (PermitTRAK and ProjectTRAK): Select this option if you want to be able to make ad hoc changes to the emails sent automatically by TRAKiT to reviewers for permits and projects.
- **Lock Reviews to all except designated staff or ADMIN (PermitTRAK, ProjectTRAK or LicenseTRAK)**: Limits the ability to edit a review to only the selected reviewer or a TRAKiT System Administrator.

Review Status Preferences

- **Set Permit Status to 'Approved' when the status of all reviews are set to _ and Send Email to** (PermitTRAK, ProjectTRAK): This feature provides the ability to automatically set the status of the permit to APPROVED when all of the statuses of each unique review on the record are set to one or more of the indicated statuses. Entering an email address in the **And Send Email to** box will generate an email notifying the user that all reviews have been completed.
- **Set Permit Status to**: Set the Automatic Default status to apply to permits once all review statuses are set to the user-defined list of statuses. A warning message appears when no default preference is set.
- **Review Status Codes That Satisfy Prerequisites**: When used, this feature provides the ability to automatically set the status of the permit to APPROVED when the required SEQUENCE of statuses on the record are met.

Auto Email Preferences

- **Send an Automatic Email when the Review is Reassigned** (PermitTRAK and ProjectTRAK): A TRAKiT-generated email is automatically sent to the assigned reviewer when a review is reassigned to a different reviewer.
- **Send an Automatic Email to the Assigned Reviewer when a Review is Added** (PermitTRAK and ProjectTRAK): A TRAKiT-generated email is automatically sent to the assigned reviewer when a review is first added to the record. This applies to auto reviews and reviews added manually.

  Note: This option does *not* control whether an email is automatically sent when the reviewer assignment changes.
- **Custom Email Templates**: Select to use a custom email template for automated email. Once selected, a custom text file can be added and placed on the server in the **Documents** > **Email** > **Review** > ***Module*** folder. The custom template will then appear as a selectable option under the drop-down menu.

  Tip: Send approval email to multiple addresses by separating each address with a semicolon (**;**).

Print Queue

Print Queue defines the document(s) that are available from the Print feature in the Reviews pane.

Enable the Print Queue and Define the List of Available Documents

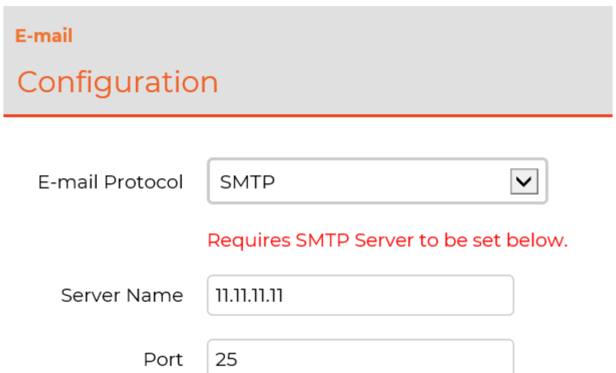
1. Enable the print queue function in System Settings > Reviews.
2. Place the documents/reports that users will print in the **//<app server>/Documents/<Module Name>/ REVIEWS** folder.

Auto Email by Module and Review Type

This feature automatically generates email from optional custom templates both by Module and Review Type. When enabled, each review type generates an email to the assigned reviewer when a review is added.

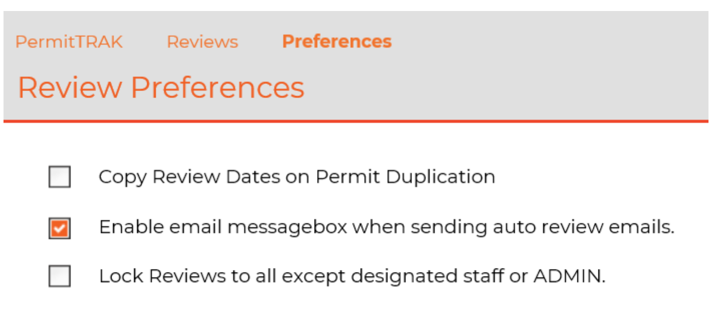
System Settings > Email

1. Select SMTP from the Email Protocol drop-down menu.
2. Enter the Server Name.
3. Enter the Port (typically 25).



Module Configuration > PermitTRAK / ProjectTRAK > Reviews > Preferences

1. Expand the Configurable Components Record List, expand **Reviews**, and then select **Preferences**.
2. Under Review Preferences, select **Enable email messagebox when sending auto review emails**.



3. Under Auto-Email Preferences, select **Send an automatic email to the Assigned Reviewer when a review is added**. This will send a default email to the Reviewer.

4. When **Custom Email Templates** is selected, a user-customized text file is utilized as the email template and overrides the system default. Loaded templates appear as selectable options under the drop-down menu.
5. Select **Add**, **Review Type**, and **Email Template**. A maximum of one email template can be associated with each review type in each module.

Note: If a review email is needed for a type and template that has not been specified in the table, the template that has been selected in the drop-down menu is used.

Building an Auto Email Template

Complete the following steps to build an email template:

1. In Windows Notepad, open a new file.
2. Type the **SUBJECT** and **BODY** elements. The body of the email template can include the value from any field from the record's primary table (for example, the Permit_Main table or the Project_Main table) or from the module review table (for example, the Permit_Reviews table).

   To insert field data, type the field name in brackets (for example, **[PERMITTYPE]**). For fields in the reviews table, type an exclamation point (!) after the opening bracket before the field name (for example, **[!ReviewType]**).

   Example:

   ```
   SUBJECT: A New Review has been added to Permit # [PERMIT_NO].
   ```

   ```
   BODY: Please assess the [PERMITTYPE] at [SITE_ADDR] applied for on [APPLIED]
   by [APPLICANT_NAME]. Please complete your [!ReviewType] by [!Date_Due].
   ```
3. Save the file in the following directories:
   - For PermitTRAK templates: \\<YourAppServer>\TRAKiT\Documents\Email\Reviews\Permit
   - For ProjectTRAK templates: \\<YourAppServer>\TRAKiT\Documents\Email\Reviews\Project
   - For LicenseTRAK templates: \\<YourAppServer>\TRAKiT\Documents\Email\Reviews\License

Trades

Use the trades feature to manage inspection requests, inspector lists, and inspection result codes based on an assigned trade.

Limit an eTRAKiT Inspection Request by Trade

1. Create a list of trades in TRAKiT's System Settings.
2. Ensure that each AEC TRAK record type corresponds to a trade defined in step 1.
3. Associate a trade to an inspection type. For more information about how to associate an inspection with a trade, see "Create Inspection Types."

Limit the List of Inspectors and Available Result Codes by Trade

1. Create a list of trades in TRAKiT's System Settings.
2. Associate an inspector with a trade. For more information about how to associate an inspector with a trade, see "Define Trade-Specific Inspectors."

3. Associate a result code set with a trade. For more information about how to associate an inspector with a result code set, see “Define Trade-Specific Results.”

Inspections

The Inspection configuration stores information used to schedule inspections in GeoTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, and LicenseTRAK.

Inspection Preferences

Inspection preferences are in the **Module Configuration**, *module,* **Inspections** section for GeoTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, and LicenseTRAK. Preferences vary by module.

GeoTRAK

The **Inspections** section for GeoTRAK includes the **Inspection Options** page with multiple sections.

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see “Create Inspection Types.” The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific GeoTRAK record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the **Set Default Inspector when new record is created** option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
    - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are displayed to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 p.m.).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

PermitTRAK

The **Inspections** section for PermitTRAK includes the **Preferences** group with multiple pages.

Preferences page

This page includes multiple sections.

The **Inspection – Options** section includes the following options:

- **Show eTRAKiT inspection request types in Permits Type Definitions**: Adds eTRAKiT inspections as a configurable component in PermitTRAK type definitions. For more information, see “Configurable Components.”
- **Inspection Time Increments**: Use this option to define how time increments are displayed to the user. Select **Military Time** to display times based on the 24-hour clock (1500 vs. 3:00 p.m.).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes multiple sections.

The **Inspector Assignment** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see “Create Inspection Types.” The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific GeoTRAK record.
- **Insp Type Overrides Geo**: If you select this option, when a default inspector is assigned to both the inspection type and a GeoTRAK record, the inspector assigned to the inspection type takes precedence over the inspector assigned to the GeoTRAK record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the Set Default Inspector when new record is created option, the default inspector must be selected when the first inspection is added to the record.
- **Use Default Inspector2 when Permit Prefix is**: The inspector assigned as the Default Inspector2 for a specific inspection type is assigned as the default inspector for record that matches the selected prefix.

The **Inspection Triggers** section includes the following option:

- **Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is**: The Finaled Date is automatically set to the current date when the selected inspection result code is entered for all inspection types that begin with a double asterisk (e.g., **Building Final).

The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see “Re-Inspection Fee Schedule.”

Restrictions page

The **Restrictions** page includes the following options:

- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
    - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Enable Per-Record Inspection Sequencing**: Select this option to define a per-permit inspection sequence. Inspections must be completed in order. A user cannot schedule an inspection until all prerequisite inspections are cleared.

  To enable inspection sequencing, complete the following steps:

    1. Select **Enable per-record inspection sequencing**. Enabling this feature adds an additional column labeled with a pound sign (#) to the TRAKiT **Inspections** pane and the Workspace **Inspection Center**.
    2. Number each inspection. An inspection numbered zero (0) is exempt from sequencing.
    3. In the **Inspection Result Codes that Satisfy Prerequisites/Sequencing** list, select one or more inspection results that satisfy the sequencing requirement.

    Note: This feature overrides the inspection's REQUIRED PREVIOUS INSPECTION setting.
- **Allow Inspection Scheduling based on permit status**: Select this option to define the status the permit must have before the inspection can be scheduled. Clear this option if you want to allow inspections to be scheduled regardless of the permit status.

  Note: This does not prevent an inspection from being added to the record but does prevent the scheduled date from being set.

ProjectTRAK

The **Inspections** section for ProjectTRAK includes the **Preference** group with multiple pages.

Preferences page

This page includes multiple sections.

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see "Create Inspection Types." The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific GeoTRAK record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the Set Default Inspector when new record is created option, the default inspector must be selected when the first inspection is added to the record.

- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
  - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are displayed to **the user**. Select Military Time to display times based on the 24-hour clock (1500 vs. 3:00 p.m.).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes the **Re-Inspection Fee Schedule** section. The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see “Re-Inspection Fee Schedule.”

CodeTRAK

The **Inspections** section for CodeTRAK includes the **Preferences** group with multiple pages.

Preferences page

This page includes multiple sections.

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see “Create Inspection Types.” The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific GeoTRAK record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
  - **Set on first inspection**: If you select this option and the Set Default Inspector when new record is created option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
  - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are displayed to **the user**. Select Military Time to display times based on the 24-hour clock (1500 vs. 3:00 p.m.).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes the **Re-Inspection Fee Schedule** section. The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see “Re-Inspection Fee Schedule.”

Module Configuration > CodeTRAK > Inspections > Inspection Options

- **Disable Inspections** (CodeTRAK): Disable and removes the inspections feature from the user interface.
- **Set Follow-Up Date to Most Recent Inspection Scheduled**: Automatically sets the follow-up date to the most recent inspection scheduled date.
- **Set Last Action Date to Most Recent Inspection Scheduled**: Automatically sets the last action date to the most recent inspection scheduled date.

LicenseTRAK

The **Inspections** section for LicenseTRAK includes the **Preference** group with multiple pages.

Preferences page

The **Inspection – Options** section includes the following options:

- **Set Default Inspector by Type of Inspection**: Select this option to set the default inspector based on the inspection type. For more information about how to assign a default inspector to an inspection type, see “Create Inspection Types.” The default inspector is set when an inspection is added to a record.
- **Set Geo-based Default Inspector**: Select this option to set the default inspector based on the inspector assigned to a specific GeoTRAK record.
- **Set Default Inspector when new record is created**: Select this option if you want to set a default inspector for all inspections on a record when the record is added. The inspector you choose when you add the record is assigned to all inspections associated with the record.
    - **Set on first inspection**: If you select this option and the Set Default Inspector when new record is created option, the default inspector must be selected when the first inspection is added to the record.
- **Lock Inspection when COMPLETED (EXCEPT ADMIN)**: Select this option to lock the inspection record when the completed date is entered. ADMIN users can change the inspection record when it is locked, but other users cannot.
    - **Designated Inspector OK**: Select this option to lock the inspection record for all users except the assigned inspector when a completed date is entered.
- **Inspection Time Increments**: Use this option to define how time increments are displayed to **the user**. Select Military Time to display times based on the 24-hour clock (1500 vs. 3:00 p.m.).

The **Re-Inspection – Options** section includes the following option:

- **Copy Remarks on Re-Inspection**: Select this option if you want remarks from an inspection copied to a reinspection. Clear this option if you do not want to copy remarks.

Triggers page

This page includes the **Re-Inspection Fee Schedule** section. The **Re-Inspection Fee Schedule** section includes options for setting up a reinspection fee schedule. For details about using a reinspection fee schedule, see “Re-Inspection Fee Schedule.”

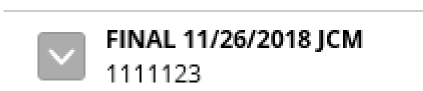
Re-Inspection Fee Schedule

Use options in the **Re-Inspection Fee Schedule** section to set up fees that are added automatically if an inspection fails with a specific result.

The Re-Inspection Fee Schedule options are available for PermitTRAK, ProjectTRAK, CodeTRAK, and LicenseTRAK.

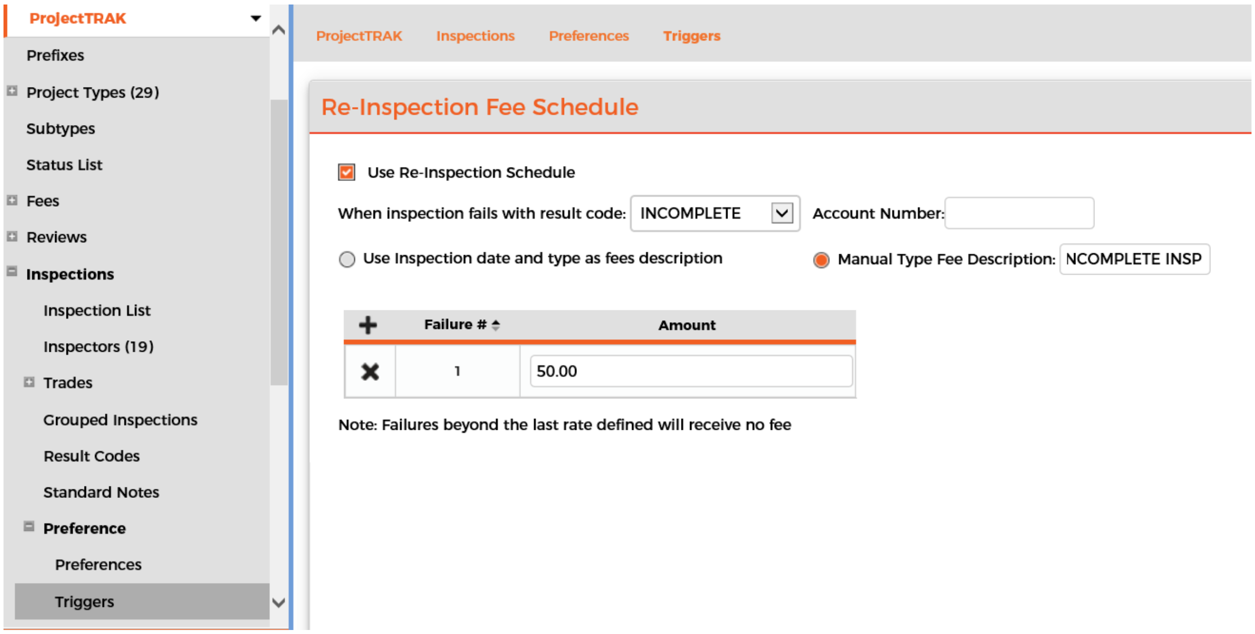
- **Use Re-Inspection Schedule**: Select this check box if you want to use a reinspection fee schedule to add fees automatically when an inspection fails with a specific result. The other options on the **Triggers** page are available only if you select this check box.
- **When inspection fails with result code**: Select the result that triggers the reinspection fee to be added to the record.
- **Account Number**: Type an account number to which reinspection fees are posted.
- **Fee description options**: Select one of the following options for the fee description that appears in the TRAKiT **Financial Information** pane for automatic reinspection fees.
    - **Use Inspection date and type as fees description**: Select this option to use the failed inspection date and type for the fee description. In the TRAKiT **Financial Information** pane, the fee name appears as the inspection name followed by the date the fee was applied and the user ID of the user who changed the inspection status.

      For example, if a Final inspection failed on November 26, 2018, and the inspector’s user ID was JCM, the fee description looks like this:

    - **Manual Type Fee Description**: Select this option to use a fee description that you define as the fee description for all automatic reinspection fees. Type the fee description in the field.
- Fee schedule: Use the fee schedule table to define the fee amount for each reinspection. For example, you could set up a $50 fee for the first failed inspection, a $200 fee for the second failed inspection, and a $500 fee for the third failed inspection. To add a fee, click ✚ and then type the fee amount. To remove a fee, click ✖ in the fee row.

  Note: If a project or license requires more reinspections than you specify in the table, reinspection fees are not added for the later inspections. For example, if you set up three fees and a project or license fails four inspections, TRAKiT adds fees for the first three failed inspections but not the fourth.



To set up a reinspection fee schedule, complete the following steps:

1. Select the **Use Re-Inspection Schedule** check box.
2. Select a result that triggers the reinspection fee to be added to the record.
3. In the **Account Number** field, type an account number to which reinspection fees are posted.
4. Select one of the following options:
   - **Use Inspection date and type as fees description**: Select this option to use the failed inspection date and type for the fee description.
   - **Manual Type Fee Description**: Select this option to use a fee description that you define as the fee description for all automatic reinspection fees. Type the fee description in the field.
5. In the fee schedule table, click **✚**.
6. In the **Failure #** column, type the failed inspection number. For example, if you are setting up the fee for a first failed inspection, type **1**.
7. Enter the fee amount for the failed inspection.
8. Repeat steps 5–7, if needed.
9. Click **Save**.

Inspection Procedures

Create Inspection Types

1. Open Module Configuration > Module > Inspections > Inspections List
2. Click **Add**.
3. Enter an Inspection Name.
4. (Optional) Enter an Inspection Description.

5. (Optional) Enter the IVR code in **Inspection No.**
6. (Optional) Select up to three **Required Previous Inspections** from the drop-down lists. Users cannot schedule the inspection until the required inspections are passed. To define the result code(s) that will satisfy the prerequisite, select one or more result codes from the **Inspection Result Codes that Satisfy Prerequisites/ Sequencing** (PermitTRAK > Inspections > Preferences > Restrictions), see “Enable Per-Record Inspection Sequencing.”

   Note: This feature is disabled if the Per Record Sequencing feature is enabled.
7. (Optional) Set the **Trade** requirement for the inspection.

   Note: This feature is used to limit an AEC TRAK Contractor’s ability to initiate inspection request to only those assigned to his or her trade.

(Optional) Set up an Automatic Re-inspection when an Inspection Receives Certain Result Codes

1. Select the result to trigger a reinspection (e.g., Failed).
2. Select the inspection to insert.
3. Select the interval type used to schedule the reinspection (Days, Years, 12/31 for the last day of the following year).
4. Enter the length of the scheduling interval (number of days or years before the reinspection).

(Optional) Set the Inspection Defaults

1. Depending on your system preferences, default inspectors may be assigned by geographic area or record type. If this inspection is assigned by type, select the **Default Inspector**.
2. If this inspection is assigned to a secondary default inspector for permits with a certain prefix only, select the **Inspector for Permits with Prefix** (the prefix must be set up in your system preferences). For more information about how to create a prefix, see “Adding a Prefix.”
3. Enter the **Default Duration** for the inspection. This field defines the inspection duration when the inspection is scheduled using the **Calendar Scheduling** feature. For example, an inspection with a duration of 1 hour when scheduled on the calendar starting at 0800; would span from 0800 to 0900.

(Optional) Create Custom Screens for an Inspection Type

1. Open Module Configuration > Module > Inspections > Inspections List
2. Either click **UDF** on the Inspections List or double-click the inspection type and then click **Custom Screens**.
3. Set up additional data fields and Custom Screens for the selected inspection type as explained in “Custom Screens.”

Inspector List

Define the Inspector List within each TRAKiT Application

1. Open Module Configuration > *module* > Inspections > Inspectors
2. Select one or more users from the **Master Users List** and drag them to the **Inspectors** list.
3. (Optional) Enter their IVR code.
4. (Optional) Define the icon that represents the inspector on Scheduled Inspections map.
5. (Optional) Reorder as required.

Delete a User from the Inspectors List

1. Open Module Configuration > *module* > Inspections > Inspectors
2. Click **Delete** next to the inspector's name in the **Inspectors** list.
3. (Optional) Reorder as required.

Tip: To quickly add a new user account, click the **Master User List Add** button. For more information about User Accounts and Privileges, see "User Preferences."

Tip: Inspectors should have a TRAKiT User account. Consider adding outside inspectors (e.g., contract inspectors) as TRAKiT users with limited privileges. Though it is not recommended, it is also possible to add an inspector that is not a TRAKiT user by clicking the **Inspectors List Add** button. However, these inspectors are not granted access to TRAKiT and cannot enter results. Furthermore, reports and historical data may be incomplete since the inspector's full names are not referenced in the User Accounts section.

Define Trade-Specific Results

This feature provides the ability of creating a set of inspection result codes that are unique to a trade.

Define a Specific Set of Result Codes for a Trade

1. Open Module Configuration > *module* > Inspections > Trades > Results by Trade
2. Select the Trade from the drop-down list or click **Add** to create a new Trade item.
3. Select one or more Result Codes from the **Master Result Code List** and drag them to the **Results list for Trade Type**.
4. (Optional) Reorder as required.

Define Trade-Specific Inspectors

This feature provides the ability to associate an inspector with a trade.

Define a Specific Set of Inspectors for a Trade

1. Open Module Configuration > *module* > Inspections > Trades > Inspectors by Trade
2. Select the Trade from the drop-down list or click **Add** to create a new Trade item.
3. Select one or more Inspector names from the **Master Inspector List** and drag them to the **Inspector List for Trade**.
4. (Optional) Reorder as required.

Grouped Inspections

Tip: To facilitate inspection scheduling and reporting, you may organize inspection types into groups (e.g., Electrical, Mechanical, Plumbing etc.) within each TRAKiT application.

Create a new Group

1. Open Module Configuration > *module* > Inspections> Grouped Inspections
2. Click **Add** next to the **Group** drop-down list.
3. Enter a **Group Name** (Maximum of 12 characters).
4. Click **Save**.

Edit an Inspection Group Title

1. Open Module Configuration > *module* > Inspections> Grouped Inspections.
2. Select the **Group**.
3. Click **Edit**.
4. Enter the new review group name.
5. Click **Save**.

Delete an Inspection Group

1. Open Module Configuration > *module* > Inspections > Grouped Inspections.
2. Select the **Group**.
3. Click **Delete**.
4. Click **OK**.

Add an Inspection to a Group

1. Open Module Configuration > *module* > Inspections> Grouped Inspections.
2. Select the **Group**.
3. Select one or more inspections from the **Master Inspections List** and drag them to the **Inspection Group** list.
4. (Optional) Reorder as required.

Delete an Inspection from a Group

1. Open Module Configuration > *module* > Inspections > Grouped Inspections.
2. Select the **Group**.
3. Click **Delete** next to the inspection item in **Inspections Group** list.
4. (Optional) Reorder as required.

Define Result Codes for Inspections

Define the Inspection Result Code Drop-down List

1. Open Module Configuration > *module* > Inspections > Result Codes
2. Click **Add**.
3. Enter the result code (maximum of 20 characters).
4. (Optional) Create an automatic re-inspection fee by adding the reinspection fee code into the Fee Code column and the re-inspection fee amount into the Amount column. For more information about creating fees, see “Creating Fee Definitions.”
5. (Optional) Reorder as required.

Create Standard Notes for Inspectors

Standard notes are predefined list of frequently used comments for inspectors that can speed up data entry. They are in the Notes screen of inspections.

Create a Standard Notes for Inspectors

1. Open Module Configuration > *module* > Inspections > Standard Notes
2. Select an inspector's name or All Inspectors.
3. Click **Add**.
4. Enter the comment/note in the **Standard Note** field.
5. Select whether this Standard note is available for all inspection types or one specific inspection type.
6. (Optional) Reorder as required.

Delete a Standard Note

1. Open Module Configuration > *module* > Inspections > Standard Notes
2. Select an inspector's name or All Inspectors.
3. Click **Delete** next to the Standard Note.

Copy a Standard Note to one or more Inspectors

1. Open Module Configuration > *module* > Inspections> Standard Notes
2. Select an inspector's name.
3. Select the note to copy.
4. Click Copy Notes to Another User.
5. Select one or more inspectors.
6. Click **Save**.

Create Standard Remarks for Batch Scheduling

Standard remarks are predefined list of frequently used comments or statements from which a user can select one or more when using the batch scheduling feature.

Create a Standard Remark

1. Open Module Configuration > *module* > Inspections > Standard Remarks
2. Enter a list of standard remark(s). Each remark must begin on a new line and may be a maximum of 40 characters in length.

Event Scheduler

The Event Scheduler stores defined events and their associated activities and time frames. This feature is available in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, and AEC TRAK.

Create an Event

1. Open Module Configuration > *module* > Event Scheduler
2. Click **Add**.
3. Enter an **Event Title** (maximum 50 characters).
4. Select either **User Work Dates Calendar** or **Use All Days—including weekends and holidays.** This determines how the activity date is calculated. It is not possible to switch between these settings in the same event.

Create an Activity

1. Click **Add.**
2. Enter a **Description** for the activity (maximum 30 characters).
3. Enter the time frame for the activity. Enter a positive number for an activity that occurs after the event date. Enter a negative number for an activity that occur before the event date.
4. Repeat steps 1–3.
5. Click **Save**.

Conditions

Conditions stores the definitions for the Conditions feature in PermitTRAK, ProjectTRAK, and LicenseTRAK.

Enable the Conditions Feature

1. Open Module Configuration > *module* > Conditions > Conditions List.
2. Click Allow Multiple Conditions.

Create a new Condition

1. Open Module Configuration > *module* > Conditions > Conditions List.
2. Click **Add**.
3. Enter a condition name.
4. (Optional) Enter condition notes.
5. (Optional) Select a default contact. See “Define the Default Contacts List” for more information about how to define this list.
6. (Optional) Create a custom screen. For more information about Custom Screens, see “Custom Screens.”
7. (Optional) Reorder as required.

Grouped Conditions

Create a new Group:

1. Open Module Configuration > *module* > Conditions> Grouped Conditions
2. Click **Add** next to the **Group** drop-down list.
3. Enter a **Group Name** (Maximum of 12 characters).
4. Click **Save**.

Edit a Condition Group Title

1. Open Module Configuration > *module* > Conditions> Grouped Conditions.
2. Select the **Group**.
3. Click **Edit**.
4. Enter the new review group name.
5. Click **Save**.

Delete a Condition Group

1. Open Module Configuration > *module* > Conditions > Grouped Conditions.
2. Select the **Group**.
3. Click **Delete**.
4. Click **OK**.

Add a Condition to a Group

1. Open Module Configuration > *module* > Conditions> Grouped Conditions.
2. Select the **Group**.
3. Select one or more conditions from the **Master Conditions List** and drag them to the **Conditions Group** list.
4. (Optional) Reorder as required.

Delete a Condition from a Group:

1. Open Module Configuration > *module* > Condition > Grouped Conditions.
2. Select the **Group**.
3. Click **Delete** next to the condition item in **Conditions Group** list.
4. (Optional) Reorder as required.

Departments

Create a new Department

1. Open Module Configuration > *module* > Conditions > Departments.
2. Click **Add** and enter a **Title**.
3. (Optional) Reorder as required.

Status List

Create a new Condition Status

1. Open Module Configuration > *module* > Conditions > Status List.
2. Click **Add** and enter a **Status Title**.
3. (Optional) Reorder as required.

Contacts

Define the Default Contacts List

1. Open Module Configuration > *module* > Conditions > Contacts.
2. Select one or more names. Names are available in the Contact drop-down list when creating or editing a condition.

Preferences

- **If Default Contact Not Defined, Insert Current User**: The currently logged in user's name will be assigned as the default contact when no default contact is assigned on the Conditions List definition.

Triggers

- **Prevent Create Sub permits**: Disables the creation of subpermits in a project for selected statuses.
- **Enable Project Status Lock**: Enables a project status to be locked based whether selected conditions are met.
- **Enable Project Fee Status**: Disables editing of project fee status until selected conditions are satisfied.
- **Enable Sub-Permit Status**: Disables editing of a subproject or subpermit status until conditions are met.
- **Enable Sub-Permit Limitation**: Displays a user warning message when subprojects or subpermits are created on a project with conditions.
- **Enable Restriction Message Warnings**: Displays a warning message to an eTRAKiT user when a permit is created on a project with conditions.

Checklists

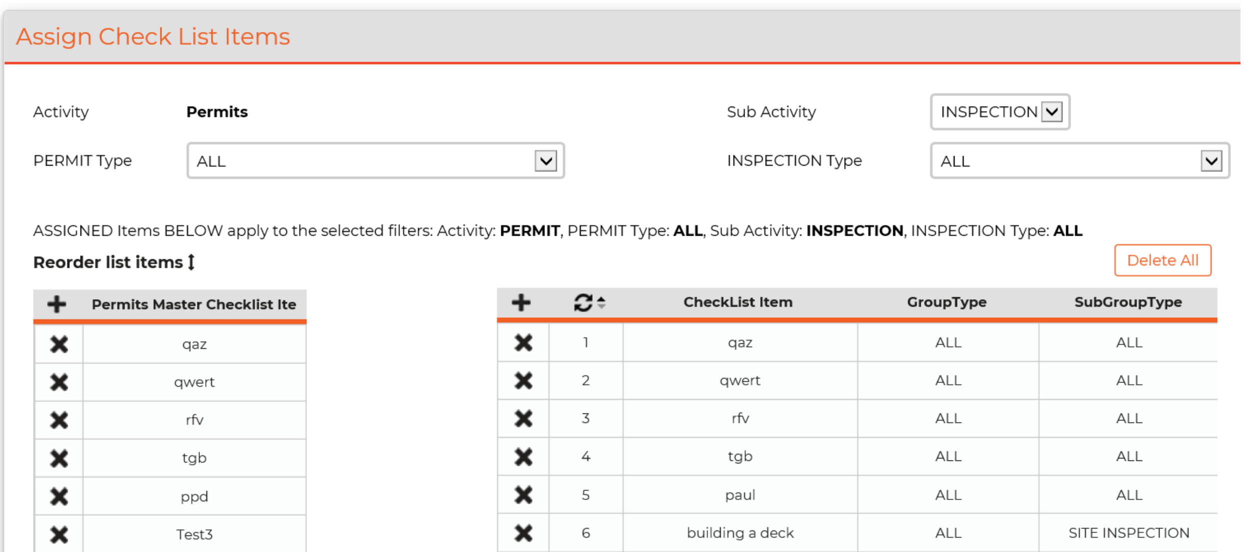
Checklists provide an option for determining multiple conditions with Inspections and Reviews. Checklists must be preconfigured in Utilities & Maintenance for use with Inspection and Review Types.

Build Checklists

Module Configuration > *module* > Checklists > Build Checklists

Checklist options are built based on Record Type and either Inspection Type or Review Type. Options can be configured for each combination of settings. For this example, PermitTRAK shown below.

1. Choose the **Permit Type** from the drop-down menu. (Examples: All, Building Residential, etc.)
2. Select the **Sub Activity** from the drop-down menu. The choices are **Inspection** or **Review**.
3. Choose the **Inspection Type** or **Review Type** from the drop-down menu.
4. Drag all applicable global checklist items from the master list on the left to the specifically configured list on the right. For checklist items assigned to the selected types and subactivity, click ✚ to create a new one-time item in the table on the right.
5. Select **Save** when done.



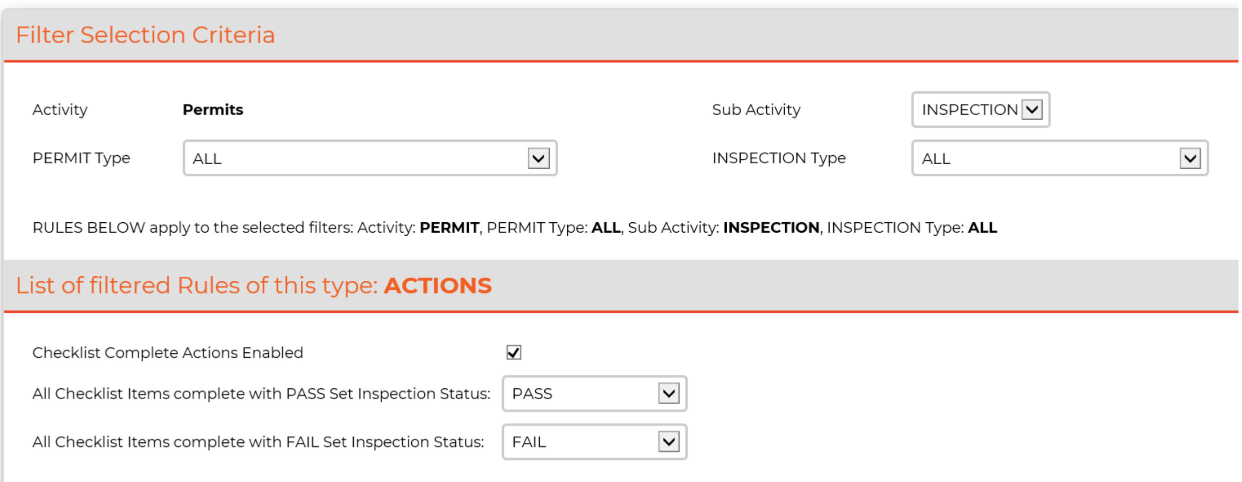
Checklist Rules

Module Configuration > *module* > Checklists > Checklist Rules

Global checklist rules are configured based on the Record Type and either the Inspection Type or Review Type. The rule options for each setting combination are shown below.

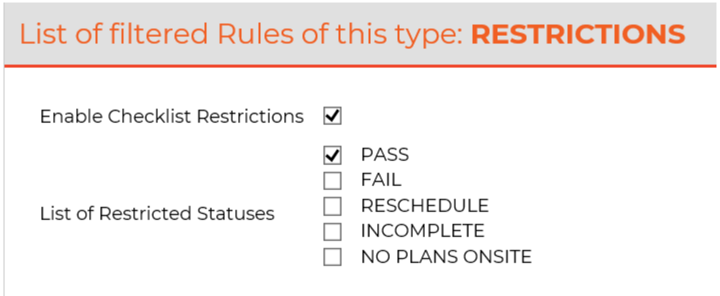
Checklist Rules: ACTIONS

1. **Checklist Complete Actions Enabled**: Select to turn on the functionality for actions to occur after the checklist is updated and finished.
2. **All Checklist Item Complete with PASS Set Inspection Status**: Select the status from the dropdown menu to apply to the parent record when a checklist is complete, which includes all linked reviews and inspections. This only applies when the **Checklist Complete Actions Enabled** checkbox is selected.
3. **All Checklist Items Complete with FAIL Set Inspection Status**: Select the status from the dropdown to apply to the parent record when a checklist has at least one failure, which includes all linked reviews and inspections. This only applies when the **Checklist Complete Actions Enabled** checkbox is selected.



Checklist Rules: RESTRICTIONS

1. **Enable Checklist Restrictions**: Select the checkbox to turn on the ability to restrict certain actions
2. **List of Restricted Statuses**: Select from the available list of statuses to limit the user from editing an inspection or review to the listed statuses until the checklist linked to that inspection or review is complete.



Checklist Rules: GENERAL

- **Copy Checklist Details for Autos of Type INSPECTION**: Select this checkbox to ensure checklists will carry forward to subsequent inspections or reviews if an inspection or review has been failed.

Module System Preferences

This section defines the module-specific system preferences.

PermitTRAK

The following system preferences are available for the PermitTRAK module:

Enable or Disable a System Preference

1. Open Module Configuration > PermitTRAK > Preferences.
2. Select either Preferences, Default Triggers, Default Restrictions, or Default Date Settings.

The following is a list of explanations for the PermitTRAK System Preferences.

Preferences

The following PermitTRAK System Preferences apply to the entire module and are not type-specific. For more information about PermitTRAK type-specific preferences, see “System Preferences by Record Type (PermitTRAK & ProjectTRAK only).”

Delete Permit:

- **Delete Permit Record**: Deletes a specified permit record. This option is available *only* for Admin users. Users without Admin permission cannot access the Delete Permit function.

Main Permit—Options:

- **Show dialog box to allow copy of Description and Notes to new Sub-Permit**: Allows the user to determine when the description and notes are copied to a subpermit. When disabled, the notes and description are automatically copied to the subpermit.
- **Disable Attachments DELETE**: Disables all users ability to delete attachments (this feature overrides the user’s privileges). Does not apply to System Administrators.
- **Lock Permit FINALED DATE on All Permit Types**: Locks the FINALED date field for all users. Does not apply System Administrators.

Permit Sub-Screen Indicators—Select one of the following options to define how panes with multiple items display the total number of items in the pane title:

- No indicator—Only the title appears (for example, **Contacts**)
- Asterisk indicator—An asterisk (*) appears after the pane title (for example, **Contacts***)
- Record Count Indicators—The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)

Attachment Auto-Email Preferences:

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Default Triggers

Enable or disable triggers:

1. Open Module Configuration > PermitTRAK > Preferences > Default Triggers.
2. Enable or disable preferences as required by selecting them.

The following are a list of PermitTRAK Triggers and their explanations:

Status Triggers

The following triggers apply to the status field.

- **Default Status for New Permit**: Defines the initial status when the record is created.
- **Reset Permit Status on Review Status Change**: Changes the permit status to the selected status and clears the APPROVED date when the status of any existing review is changed.
- **Change Status on ISSUED to**: Automatically sets the permit status to the one selected when the issued date is entered.
- **Set Status to FINALED when finaled date is entered**: Automatically set the permit status to FINALED when the user either manually or automatically enters the finaled date.

Tip: The finaled date can be automatically set when the final inspection is passed. For more information about this feature see, **Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is**.

Tip: The expiration date can be automatically cleared when the finaled date is entered. For more information, see **Clear Expiration date when Finaled date is entered**.

- **Change Permit Status when Finaled To**: Provides the ability to select a specific status when the finaled date is entered.

Lock Triggers

- **Lock Permit Record after Issued**: Locks the permit information, contacts, valuations, financial information, chronology, and custom screen panes after the issued date is set. Additionally, you can exclude the Chronology pane and Financial pane from the lock by selecting either **Exclude Chronology, Exclude Financial Pane** or **Exclude Contacts**.
- **Lock Permit Record after Finaled or Expired (Applies to Inspection & Reviews)**: Locks the Permit Record (including the Reviews and Inspections pane) when the finaled date is entered or on the expiration date of the permit.
- **Lock Permit when Status is**: Defines the status that locks the entire permit record except for Bonds.
- **Lock Permit REVIEWS after ISSUED**: Locks all panes in the record except for Bonds.
- **Lock Permit REVIEWS after ISSUED**: Locks the reviews pane after the issued date is set.
- **Lock Permit Status except for ADMIN**: Only System Administrators are able to manually change the permit status.

Date Triggers

- **On Create, set Approved and Issued to Current date**: Automatically sets the approved and issued date to the current date when the record is initially created.
- **Clear Expiration date when Finaled date is entered**: Clears the expiration date when the finaled date is entered.

Tip: The finaled date can be automatically set when the final inspection is passed. For more information about this feature see, **Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is**.

- **Set ISSUE date on Print Request**: Automatically sets the ISSUED date to the current date with the **Print** button.
- **On Create, set Approved to Current Date**: Automatically sets the approved date to the current date when the record is created.

Contractor Records

- **Verify Contractor Record before ISSUE**: Displays a dialog box when the ISSUE date is set if any of the following dates are expired: State Registration, Business License or Insurance.
- **Verify Contractor Record before PRINT**: Displays a dialog box when the PRINT button date is pressed if any of the following dates are expired: State Registration, Business License or Insurance.
- **Verify Contractor Record before INSPECTIONS**: Displays a dialog box when the ADD INSPECTIONS button is pressed if any of the following dates are expired: State Registration, Business License or Insurance.

Default Restrictions

- **Prevent ISSUE Before APPROVED**: Disables the ability to set the ISSUED date until an APPROVED date is entered.
- **Prevent ISSUE Before All FEES are Paid**: Disables the ability to set the ISSUED date if there is balance due on the permit.

- **Prevent ISSUE Unless Status Set To**: Disables the ability to set the ISSUED date until the permit status matches the status selected in this preference.
- **Prevent Creating Sub-Permits when Locked**: Disables the users ability to create a subpermit when the record is locked.

Default Date Settings

- **Default Expiration Days**: **Automatically set when Permit is Issued**: Automatically sets the *expiration* date on the permit when the *issued* date is entered. Expiration date is calculated from current date and based on calendar days. Prompts user to confirm.
- **Suppress User Prompt**: Automatically sets expiration date without user confirmation.
- **Default Expiration Days: Automatically Set After Inspection when Result Is**: Automatically sets the EXPIRATION date on the permit when either the selected status is set or any status is set on an inspection. EXPIRATION date is calculated from current date and based on calendar days. Prompts user to confirm.
- **Suppress User Prompt**: Automatically sets expiration date without user confirmation.
- **Permit Date Label**: Provides the ability to customize the label used to identify the sixth (last date) on the permit information pane.
- **Permit Date Setting (Days) Automatically Set**: This preference is used to automatically calculate and set the sixth date on the permit information screen. The first box defines the number of days and the drop-down list defines which existing date the sixth date is based upon.

ProjectTRAK

The following system preferences are available for the ProjectTRAK module:

Enable or Disable a System Preference

1. Open Module Configuration > ProjectTRAK > Preferences.
2. Select either Preferences, Triggers or Restrictions.

The following is a list of explanations for the ProjectTRAK System Preferences:

Preferences

- **Show Tooltip while Adding Condition and Condition Groups**
- **Delete Project Record**: Deletes a specified project record.
- **Change Label for Planner drop-down**: Default label is Planner. When enabled, provides the jurisdiction the ability to define the label associated with the name drop-down list on the Project Information pane.
- **Project Sub-Screen Indicators**: Select one of the following options to define how panes with multiple items display the total number of items in the pane title:
  - No indicator—Only the title appears (for example, **Contacts**)
  - Asterisk indicator—An asterisk (*) appears after the pane title (for example, **Contacts***)
  - Record Count Indicators—The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)

- **Default Date Settings**: ProjectTRAK provides the ability to change the labels associated with the dates on the Project Information pane (except for Applied).

Warning: The **Projects** pane in the TRAKiT Workspace uses the closed date to define which records are displayed. Changing the closed label might cause the **Projects** pane to incorrectly indicate which projects are currently open.

Warning: TRAKiT standard ProjectTRAK reports use the default label settings. Changing the labels might cause the ProjectTRAK standard reports to display incorrect or misleading data.

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Triggers

- **Lock Project Record After CLOSED**: Locks the record after the closed date is entered.
- **Default Status for New Project**: Defines the initial status when the record is created.

Restrictions

- **Prevent Creating Sub-Projects When Locked**: Disables the users ability to create a subproject when the record lock is set.
- **Prevent Creating Sub-Permits When Locked**: Disables the users ability to create a subpermit when the record lock is set.
- **Prevent Linking Cases to CLOSED Projects**: Disables the users ability to link an existing CodeTRAK record to the project after the CLOSED date is entered.
- **Only Allows the Assigned Planner or the Admin to Edit the Project**: Limits the ability to edit the Project Information, Chronology, Financial Information, Conditions, and Custom Screen panes to either the assigned staff member or System Administrator. Also, any contact record automatically inserted at the time the record is created will only be editable by the assigned staff member or System Administrator.
- **Disable Attachments DELETE**: Disables all users ability to delete attachments (this feature overrides the user’s privileges). Does not apply to System Administrators.
- **Set Word (.DOC) to Read-Only**: Automatically sets the attribute flag for Microsoft Windows Word documents (.DOC) to read-only when attached to a record.
- **Enable Project Sync Feature**: Enables a master project to be created at the same time as linked subprojects with synchronized descriptions, details and dates. Once selected, the Sync Status settings in the drop-down menu become available for selection.

CodeTRAK

The following system preferences are available for the CodeTRAK module:

Enable or Disable a System Preference

1. Open Module Configuration > CodeTRAK > Preferences.
2. Select either Preferences, Triggers or Restrictions.

The following is a list of explanations for the ProjectTRAK System Preferences:

Preferences

- **Set Follow-Up Date to Most Recent Chronology Action**: Automatically sets the **Follow-Up** date to the most recent Chronology Activity's **Action Date**.
- **Set Last Action Date to Most Recent Chronology Action**: Automatically sets the Last Action date to the most recent Chronology Activity's Action Date.
- Custom Email Templates: Select this option to set a default email template to use for emails that are sent from the Attachments dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select (use blank template) if you want emails to be blank. If you do not use an email template, the sender must type text in the Subject and Body fields in the email dialog box.

Triggers

- **Change Label Optional Case Date**: Provides the ability to customize the label used to identify the sixth (last date) on the case information pane.
- **Delete Case**: Deletes the specified case record.
- **Default Officer for New Cases**: Provides the ability to set the default officer based on either the officer assigned to the **Geo**TRAK record or an individual from the drop-down list. Select GEO Based to assign the officer based on the **Geo**TRAK record.
- **Default Status for New Cases**: Defines the initial status when the record is created.
- **Email Notify Officer when New Case is Created from GeoTRAK**: Automatically generates an email to the officer, selected by the user, that a new case has been created.
- **Enable Cross-Link Function**: The TRAKiT default behavior provides the ability to create linked cases and duplicate cases. A linked case creates a parent-child relationship between the records. Duplicating a case creates a copy of the original case record.

Note: Enabling the Cross-Link function changes the default behavior and provides the ability to create a new case record that is linked to the current case record and copies information from the current record (site info, contacts, custom screens, and fees) to the new case record, as required. All records created using this feature are listed on the **Tree** tab under **Linked Cases**. There is no parent-child relationship for cross-linked cases.

- **Lock Case Record After CLOSED**: Locks the record after the CLOSED date is entered. To exclude the Chronology pane from this setting, select **Exclude Chronology Pane from the CodeTRAK Case Closed Lock** or **Exclude Attachments**.
- **Lock Chronology Item After Saved**: Places a lock on the chronology record after the user leaves the chronology pane.
- **Lock Chronology Items After Action Date**: Locks the Chronology activity after the Action Date is passed.

Restrictions

- **Disable Attachments DELETE**: Disables all users ability to delete attachments (this feature overrides the user's privileges). Does not apply to System Administrators.
- **Record Sub-Screen Indicators**: Defines how panes with multiple items display the total number, if any. Options include:
    - No indicator—Only the title appears (for example, **Contacts**)
    - Asterisk indicator—An asterisk (*) appears after the pane title (for example, **Contacts***)
    - Record Count Indicators—The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)
- **Protected Contacts**: Provides the ability to hide the selected contact or contacts from users who do not have the CODE: CAN_VIEW_PROTECTED_CONTACTS user privilege.

LicenseTRAK

The following system preferences are available for the LicenseTRAK module:

Enable or Disable a System Preference

1. Open Module Configuration > LicenseTRAK > Preferences.
2. Select Preferences, Triggers, Restrictions, or License Options.

The following is a list of explanations for the LicenseTRAK System Preferences:

Preferences

- **License Sub-Screen Indicators**: Select one of the following options to define how panes with multiple items display the total number of items in the pane title:
    - No indicator—Only the title appears (for example, **Contacts**)
    - Asterisk indicator—An asterisk (*) appears after the pane title (for example, **Contacts***)
    - Record Count Indicators—The number of records appears in parentheses after the pane title (for example, **Contacts (4)**)
- Encrypt MainTextField1–5: Select this option if you want to encrypt the field value for this field. Fields that are encrypted appear masked as dots in TRAKiT. Users with appropriate privileges can unmask the value.

    Important: These options *cannot* be toggled on and off. Once you select the option to encrypt a field and you save your changes, you cannot clear the option.

    Note: Ensure the fields you want to encrypt are not set up as drop-down lists. Drop-down lists cannot be encrypted.

    For more information about user privileges related to masked fields, see descriptions of the following user privileges in the "User Privileges" section of this guide:

    - AEC TRAK DENY VIEW FEINSSN
    - LicenseTRAK DENY VIEW FEINSSN

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Triggers

- **When a Business License is paid, Prompt for setting License Expiration to a specified date**: Prompts the user to accept the automatic setting of the license expiration date to the specified date when fees are paid.
- **When a Business License is paid, Prompt for setting License Expiration date to end of year**: Prompts the user to accept the automatic setting of the license expiration date to 12/31 of the current year when fees are paid.
- **Set the STATUS for a new Business License to**: Defines the initial status for a new business license record.
- **Display Custom Screens on business type**: Provides the ability to create business type-specific custom screens.
- **Show Confidentiality message on Owner Tab**: Displays a message to the user when the Owner Contact information is accessed. To define or edit the message, click the **message** link in the system preference title.
- **Disable Inspections button in LicenseTRAK**: Disables and removes the inspections feature from the user interface.
- **Delete License**: Deletes the specified license record.
- **Verify Unique Business Name**: Notifies the user if the Business Name exists. User can elect to continue or change the business name.
- **Verify Unique Business Tax ID**: Notifies the user if the Business Tax ID exists. User can elect to continue or change the Tax ID.
- **When a Business License is paid, Set TAG for Printing**: Automatically sets the TAG field in the License_Business table to the value of one (1) when fees are paid.

Tip: The TAG field can be viewed or manually set through the Custom Screens. For more information about adding a field to a Custom Screen, see “Custom Screens.”

Restrictions

- **Set Word (.DOC) to Read-Only (Business)**: Automatically sets the attribute flag for MS Windows Word documents (.DOC) to read-only when attached to a record.
- **Disable Attachments DELETE (Licenses)**: Disables user’s ability to delete License record attachments (this feature overrides the user’s privileges). Does not apply to System Administrators.
- **Allow Only ONE License Per Business With Prefix**: Default behavior allows the creation of multiple licenses per business record with a prefix. Enabling this feature only allows one license per business record with a prefix.
- **Allow Only ONE License Per Business Without Prefix**: Default behavior allows the creation of multiple licenses per business record without a prefix. Enabling this feature only allows one license per business record without a prefix.

- **Lock All Drop-downs in LicenseTRAK to Prevent Text Entry**: Requires user to select from the drop-down lists only. Users cannot manually enter data.
- **Set Word (.DOC) to Read-Only (License)**: Automatically sets the attribute flag for MS Windows Word documents (.DOC) to read-only when attached to a record.
- **Disable Attachments DELETE (Business)**: Disables user's ability to delete Business record attachments (this feature overrides the user's privileges). Does not apply to System Administrators.
- **Disable Print Queue (Shows Only the Current Record)**: By default, the TRAKiT print feature provides the user with the ability to queue up documents from different records within the same module and then print them all simultaneously. By selecting this system preference, the print queue is disabled and the user will only be able to print documents from the current record.

License Options

- **New Business License, Set Issue Date = N/A**: Sets the Issue date on a new license to not applicable.
- **New Business License, Set Issue Date = Today**: Sets the Issue date to the current date on a new license.
- **New Business License, Set Expiration Date = N/A**: Sets the Expiration date on a new license to not applicable.
- **New Business License, Set =**: Sets the Expiration date on a new license to the specified date.
- **New Business License, Set Expiration = One Year**: Sets the Expiration date to one year from current date.

CRM TRAK

The following system preferences are available for the CRM TRAK module:

Enable or Disable a System Preference

1. Open Module Configuration > CRM TRAK > Preferences.
2. Select Preferences.

The following is a list of explanations for the CRM TRAK System Preferences:

Preferences

- **Due Date is Set _ days from current date**: Calculates the due date from the current date based on the number of days entered. CRM TRAK uses calendar days to calculate the due date.
- Disable BCC Emails to Logged in User when issue is created from Trakit9
- **Issues are Locked**: The record is locked when the status designated as **This Status Marks the Issue as Completed** is selected.
- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

AEC TRAK

The following system preferences are available for the AEC TRAK module:

Enable or Disable a System Preference

1. Open Module Configuration > AEC TRAK > Preferences.
2. Select Preferences, Contractor Options, or Sub-Screens.

The following is a list of explanations for the AEC TRAK system preferences:

Autogen Options

These options are on the **Preferences** page.

- **AEC Registration Number AutoGen Name**: Defines how AEC TRAK registration numbers are created. Select an existing autogen number from the list to automatically number a new AEC TRAK record.
- **AEC Receipt Number AutoGen Name**: Defines the AutoGen number used on the receipt.
- **AEC Receipt Document Name**: Defines the document that is used to generate a receipt in AEC TRAK. These documents are stored in **\\<app server>\TRAKiT\Documents**.

Attachment Auto-Email Preferences

This option is on the **Preferences** page.

- **Custom Email Templates**: Select this option to set a default email template to use for emails that are sent from the **Attachments** dialog box in TRAKiT. Then, chooose a template to use. Clear this option or select **(use blank template)** if you want emails to be blank. If you do not use an email template, the sender must type text in the **Subject** and **Body** fields in the email dialog box.

Contractor Options

- **Enable Contractor PIN**: Enables the usage of the assigned contractor PIN in eTRAKiT.
- **Verify Contractor when selected from ‘Lookup From’ on Search/Scan screen**: User is notified if any of the following dates have expired: State License (Registration Number Expiration Date), Business License Agency #1, Insurance (Workmans Comp and Liability).
- **Ignore Any License Date Check when the Field is Empty**: Ignores any of the following fields during the Contractor Verification process if the fields are empty (State License, Business License Agency #1, Insurance (Workmans Comp and Liability). User is only notified if a field has a date that is expired. This preference requires **Verify Contractor when selected from ‘Lookup From’ on Search/Scan screen** be enabled.
- **Check for Expired Date in AEC to Flag Contact**: Sets the AEC TRAK record flag and the contact information to red if any of the following dates have expired State License, Business License Agency #1, Insurance (Workmans Comp and Liability).
- **Set Word (.DOC) to Read-Only**: Automatically sets the attribute flag for MS Windows Word documents (.DOC) to read-only when attached to a record.
- **Disable Attachments DELETE**: Disables users ability to delete attachments (this feature overrides the user’s privileges). Does not apply to System Administrators.

- **Disable Print Queue (Show Only the Current Record)**: By default, the TRAKiT print feature provides the user with the ability to queue up documents from different records within the same module and then print them all simultaneously. By selecting this system preference, the print queue is disabled and the user will only be able to print documents from the current record.
- **Link AEC Types to Prefixes**: Provides the ability to generate prefix based record numbers.

Generate Prefix Based Record Numbers in AEC TRAK

1. Select Link AEC Types to Prefixes.
2. Create an autogen number for each AEC TRAK type. The Name/Description of the autogen number must begin with **AEC_** (i.e., AEC_Attorney).

- **Default Status for New AEC Record**: Defines the default status when a AEC TRAK record is created.
- **Delete AEC**: Deletes the specified AEC TRAK record.

The following AEC TRAK preferences allow you to customize the standard field labels:

- **Change Label for Company Information**: Replaces **FEIN or SSN** with customized label (Company Information pane).
- **Change Label for Business License**: Replaces **Business License** with customized label (License Information pane).
- **Change Label for License Types**: Replaces **License Types** with customized label (License Information pane).

Sub-Screens

Record Sub-Screens Indicators: Defines how panes with multiple items display the total number, if any.

Options include:

- No indicator (e.g., Contacts)
- Asterisk indicator (e.g., Contacts*)
- Record Count Indicators (e.g., Contacts (4))

Module-Specific Internet Links

Internet Links contains the list of system-wide websites accessible through TRAKiT's Internet Links feature. TRAKiT provides the ability to define either global or module-specific links. To create a module-specific link:

1. Open Module Configuration > *module* > Internet Links
2. Click **Add** and select a **Category**.
   - Internet Links—Accessible through **Internet Links** feature.
   - Code Search Links—Accessible through the **Links** button on the Notes screen in CodeTRAK.
   - Imaging Links—Accessible through **Imaging Links** feature.
3. Enter a title or description for the link.
4. Enter the URL.

Tip: There are special tags that can be used in URLs that will allow TRAKiT to pass data to the website. General tags will work with {all} groups and will map to listed database fields. Tags must be contained in braces { }.

{RECORD_NUMBER} - PERMIT_NO (PermitTRAK), PROJECT_NO (ProjectTRAK), CASE_NO (CodeTRAK), BUS_LIC_NO (LicenseTRAK), ST_LIC_NO (AEC TRAK), SITE_APN (GeoTRAK)

{RECORD_TYPE} - PERMITTYPE, PROJECTTYPE, CASETYPE, BUSINESS_TYPE, AECTYPE, GEOTYPE

{SITE_APN} - SITE_APN (all modules). If not present will return blank.

{{SITE_APN}} - SITE_APN (all modules). Will reformat value to the parcel formatting specified in **System Settings** > APN & Phone.

{LOC_RECORDID} - LOC_RECORDID (all modules). If not present will return blank.

{RECORD_GROUP} - Will return group PERMIT, PROJECT, CASE, LICENSE, AEC, PARCEL.

Specific TRAKiT database fields can be used to pass data to the website. Database fields must be contained in braces { }:

PermitTRAK - {PERMIT_NO}, {PERMITTYPE}

ProjectTRAK - {PROJECT_NO}, {PROJECTTYPE}

CodeTRAK - {CASE_NO}, {CASETYPE}

LicenseTRAK - {BUS_LIC_NO}, {BUSINESS_TYPE}, {BUSINESS_NO}

AEC TRAK - {ST_LIC_NO}, {AECTYPE}

GeoTRAK - {GEOTYPE}

Violations

Violations provides the ability to associate one or more violations per CodeTRAK case record.

Add a new violation type:

1. Click **Add**.
2. Enter the violation title.
3. (Optional) Enter a violation description.

Tip: Violations are sorted alphanumerically.

(Optional) Add a new location:

1. Click **Add**.
2. Enter the location title.

(Optional) Add a new violation status:

1. Click **Add**.
2. Enter the status title.

(Optional) Add Custom Screens—For more information about configuring custom screens, see “Custom Screens.”

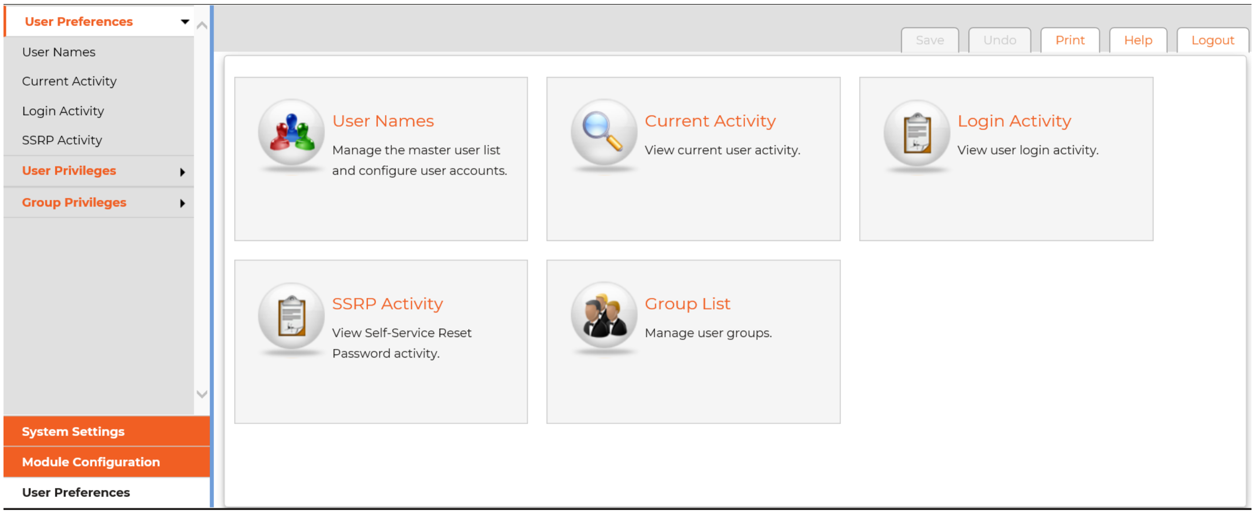
Group or Categorize Violations:

1. Create violation group by clicking **Add**.
2. Enter a group name, title, or category.
3. Click **Save**.
4. Drag violations from the **Master Violations List** to the **Violations Group**.
5. (Optional) Reorder as required.
6. Click **Save**.

Tip: Violations not added to a jurisdiction defined group are included in the **All** group.

Tip: To define the list of available documents that can be printed from the **Violations** pane, place the documents/ reports in the **//<app server>/Documents/VIOLATIONS/CASE_VIOLATIONS** folder.

User Preferences



User Preferences enable you to provide and control access to TRAKiT and TRAKiT functions. User Preferences includes the following functional areas:

- User Preferences
- User Privileges
- Group Privileges

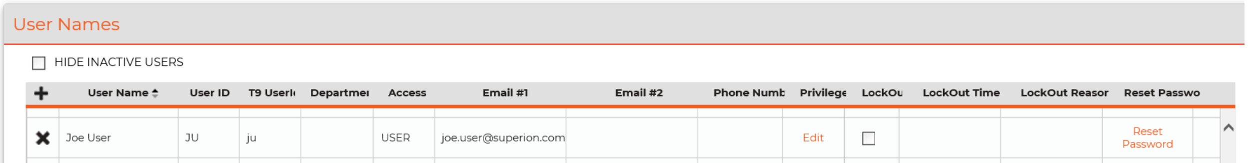
User Preferences

User Names

User Names provide the ability to create and maintain TRAKiT accounts.

Adding a TRAKiT User

1. Click Add.
2. Enter the user name (maximum 30 characters).
3. Enter a user ID. User IDs must:
    - Be unique
    - Have a maximum of 6 characters
    - Contain letters and/or numbers only (no special characters)
4. Enter a password (maximum 30 characters, no leading or trailing spaces, and no special characters other than those on a standard keyboard). If password Case Sensitivity is desired, contact TRAKiT Support. TRAKiT includes the ability to mask or hide passwords. This feature is enabled through the TRAKiT key. To reset a password using this feature, click Reset Password and enter a temporary password. The user will then log in to TRAKiT and enter a new or updated password.



5. (Optional) Select a Department.
6. (Optional) Enter a Timeout (after the timeout has elapsed, the application will close).
7. Select an Access level.
    - ADMIN—Application administrator. User has access to all TRAKiT client modules and functions. User also has access to TRAKiT WUM.
    - USER—User only has access to modules and functions as defined by assigned user privileges.
    - OBSERVER—User has read-only access to all modules.
    - INACTIVE—Disables the user's account and removes the name from all TRAKiT roles (i.e., inspector, reviewer, project manager, or officer). If the account becomes active with Admin or User access, the user must be reassociated with previously held TRAKiT roles (i.e., inspector, reviewer, project manager, or officer).
8. Enter the user's email address. The secondary email address is optional. Email #1 is mandatory when using Auto Emails by Type and Status.
9. (Optional) For clients using Windows Login: Enter the Windows ID for the user account.
10. For user accounts only: Click the Edit link to assign user privileges.

Current Activity

Current Activity displays a list of all logged-in users. The list can be filtered by department or currently logged-in users.

Filter by Department

1. Select the department from **Filter by Department**.
2. Click **Refresh** .

Display a List of Users Currently Logged On

1. Select the **Display Users Currently Logged On** option.
2. Click **Refresh** .

Tip: The **Filter by Department** and **Display Users Currently Logged On** options can be combined to display of a list of logged on users for a specific department.

Terminate or end a currently logged-on user's session by clicking **Force Out**.

Login Activity

Use this page to view a list of users who tried to log in to TRAKiT and the result of the login attempt. The list reflects data in the activity log file. By default, the list for the current day appears. To change the date, select a date in the date field above the activity listing and then click .

Note: You can change the order of the rows in this listing by dragging a row to a different position. Any changes you make are temporary and are not saved to the activity log.

SSRP Activity

Use this page to view SSRP (SQL Server Resolution Protocol) activity such as password resets. By default, the list for the current day appears. To change the date, select a date in the date field above the activity listing and then click .

The listing includes the following fields:

- **Date Time**: Date and time the activity occurred.
- **User ID**: User ID of the user who performed the activity.
- **Invitation**: Description of the SSRP activity. Activity other than new user, forgot password, and password reset by the administrator is indicated by **Unknown**.
- **Success**: Result of the activity. **True** indicates the activity was successful. **False** indicates the activity was not successful.
- **Remarks**: Additional information about the activity.

Note: You can change the order of the rows in this listing by dragging a row to a different position. Any changes you make are temporary and are not saved to the activity log.

User Privileges

Use these options to allow or prevent user access to modules and functions.

Tip: A user account (User Preferences > User Names) must be created before you can assign user privileges.

Assign User Privileges

1. Select the user's name from the navigation pane.
2. Add either group or individual privileges.

   Note: Group privileges are ***only additive***. which means that if the group definition changes, user privileges *are not* automatically changed.
3. Select any applicable roles (for example, inspector, reviewer, or officer).

AEC TRAK

AEC TRAK Privilege Title	Description
AEC DENY FINANCIAL PANE	Denies access to Financial Pane
CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.

AEC TRAK Privilege Title	Description
CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
CAN DELETE FEE	
CAN DISABLE NOTES DATESTAMP	
CAN EDIT	
CAN EDIT CHRONOLOGY NOTES	
CAN EDIT TYPE SUBTYPE	
CAN PAY FEE	User must have CAN EDIT.
CAN UNPAY FEE	User must have CAN EDIT.
DENY ACCESS	
DENY APPLY CREDIT	
DENY HOLD NOTES	Prevents the user from viewing HOLD NOTES.
DENY VIEW FEINSSN	Prevents the user from viewing the value in the **FEIN or SSN** field in the AEC TRAK module.
EDIT RESTRICTED MORE INFO	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	
RESTRICT VIEW ATTACHMENTS	Prevents the user from viewing ATTACHMENTS if the Restrict option is selected for a specific AEC TRAK type. For more information about the AEC TRAK restrict feature, see “Record Types.”

CodeTRAK

CodeTRAK Privilege Title	Description
CAN ADD	
CAN ADD CHRONOLOGY	
CAN ADD FEE	User must have CAN EDIT FEE.
CAN ADD INSPECTIONS	
CAN ADD MULTI VIOLATIONS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ATTACH PARENT PROJECT	
CAN DELETE CHRONOLOGY	
CAN DELETE FEE	User must have CAN EDIT CASE and CAN EDIT FEE.
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS
CAN EDIT	
CAN EDIT CHRONOLOGY	
CAN EDIT CODE STATUS	
CAN EDIT FEE	
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTI VIOLATION NOTES	
CAN EDIT MULTI VIOLATIONS	
CAN PAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN UNPAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN ATTACH PARENT PROJECT	
CAN ADD CASE	

CodeTRAK Privilege Title	Description
CAN DISABLE NOTES DATESTAMP	
CAN DUPLICATE	
CAN EDIT CHRONOLOGY NOTES	User must have CAN EDIT CHRONOLOGY
CAN OVERRIDE PREFIX	
DENY ACCESS	Prevents the user from accessing the CodeTRAK module.
DENY APPLY CREDIT	
DENY FEE OVERRIDE	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
CAN VIEW PROTECTED CONTACTS	
CAN EDIT TYPE SUBTYPE	
OVERRIDE DELETE ATTACHMENT LOCK	

CRM TRAK

CRM TRAK Privilege Title	Description
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ADD	
CAN EDIT TYPE SUBTYPE	
CAN EDIT	
CAN EDIT CRM NOTES	
DENY ACCESS	Prevents the user from accessing the CRM TRAK module.

CRM TRAK Privilege Title	Description
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	

LicenseTRAK

LicenseTRAK Privilege Title	Description
CAN ADD	Allows the user to create a new business or license in the LicenseTRAK module.
CAN ADD INSPECTIONS	
CAN ADD MULTICONDITIONS	
CAN ADD REVIEWS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
CAN DELETE MULTICONDITIONS	
CAN DELETE REVIEWS	
CAN DISABLE NOTES DATESTAMP	Allows the user to switch OFF the automatic date/time stamping.
CAN EDIT	
CAN EDIT CHRONOLOGY NOTES	
CAN EDIT CONTACTS AND SITE INFO	
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTICONDITION NOTES	User must have the CAN EDIT MULTICONDITION privilege.

LicenseTRAK Privilege Title	Description
CAN EDIT MULTICONDITIONS	
CAN EDIT REVIEW NOTES	
CAN EDIT REVIEWS	
CAN EDIT TYPE SUBTYPE	
CAN PAY FEE	User must have CAN EDIT.
CAN PRINT RESTRICTED DOCUMENTS	
CAN PROCESS LOCKBOX	
CAN UNPAY FEE	User must have CAN EDIT.
CAN VIEW FEE HISTORY	
DENY ACCESS	Prevents the user from accessing the LicenseTRAK module.
DENY APPLY CREDIT	User must have CAN EDIT LICENSE.
DENY EDIT CONTACTS AND SITE INFO	
DENY FEE DETAILS	This right denies access to viewing fee details in the LicenseTRAK module.
DENY FEE OVERRIDE	
DENY VIEW FEINSSN	Prevents the user from viewing the value in the **FEIN or SSN** field and other masked fields in the LicenseTRAK module. See LicenseTRAK > Preferences > Encrypt MainTextField1–5 field description for more information about optional masked fields. This access right prevents the user from viewing the FEIN or SSN field in the LicenseTRAK module.
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	

PermitTRAK

PermitTRAK Privilege Title	Description
BOND FULL ACCESS	Grants the user all bond privileges.
CAN ADD	
CAN ADD BOND	
CAN ADD CHRONOLOGY	
CAN ADD FEE	User must have CAN EDIT PERMIT and CAN EDIT FEE.
CAN ADD INSPECTIONS	
CAN ADD MULTICONDITIONS	
CAN ADD REVIEWS	
CAN ADD VALUATION	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ATTACH ON LOCKED PERMITS	
CAN ATTACH PARENT PERMIT	User must have CAN EDIT PERMIT.
CAN ATTACH PARENT PROJECT	
CAN DELETE BOND	User must have PERMIT EDIT BOND and CAN EDIT FEE.
CAN DELETE CHRONOLOGY	User must have CAN EDIT CHRONOLOGY.
CAN DELETE FEE	
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
CAN DELETE MULTICONDITIONS	
CAN DELETE REVIEWS	User must have CAN EDIT REVIEWS.
CAN DISABLE NOTES DATESTAMP	User must have FULL ACCESS.
CAN DUPLICATE	

PermitTRAK Privilege Title	Description
CAN EDIT	
CAN EDIT BOND	
CAN EDIT CHRONOLOGY	
CAN EDIT CHRONOLOGY NOTES	User must have CAN EDIT CHRONOLOGY.
CAN EDIT FEE	User must have CAN EDIT.
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTICONDITION NOTES	User must have CAN EDIT MULTICONDITIONS.
CAN EDIT MULTICONDITIONS	
CAN EDIT REVIEW NOTES	User must have CAN EDIT REVIEWS.
CAN EDIT REVIEWS	
CAN EDIT TYPE SUBTYPE	
CAN EDIT VALUATION	User must have CAN EDIT.
CAN OVERRIDE PREFIX	
CAN PAY BOND	
CAN PAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN REDUCE RELEASE BOND	
CAN UNPAY BOND	User must have CAN EDIT PERMIT and CAN EDIT BOND.
CAN UNPAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN VIEW BOND ATTACHMENTS	
DENY ACCESS	Prevents the user from accessing the PermitTRAK module.
DENY APPLY CREDIT	
DENY FEE OVERRIDE	

PermitTRAK Privilege Title	Description
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	
OVERRIDE FIN EXP LOCK	

ProjectTRAK

ProjectTRAK Privilege Title	Description
BOND FULL ACCESS	Grants the user all bond privileges.
CAN ADD	
CAN ADD BOND	
CAN ADD CHRONOLOGY	
CAN ADD FEE	User must have CAN EDIT PROJECT.
CAN ADD INSPECTIONS	
CAN ADD MULTICONDITIONS	
CAN ADD PROFFERS	This privilege is not available to all TRAKiT implementations.
CAN ADD REVIEWS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN ATTACH PARENT PROJECT	User must have CAN ADD and CAN EDIT.
CAN DELETE BOND	
CAN DELETE CHRONOLOGY	User must have CAN EDIT CHRONOLOGY.
CAN DELETE FEE	User must have CAN EDIT FEE and CAN EDIT.
CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.

ProjectTRAK Privilege Title	Description
CAN DELETE MULTICONDITIONS	User must have CAN EDIT MULTICONDTIONS.
CAN DELETE PROFFERS	This privilege is not available to all TRAKiT implementations.
CAN DELETE REVIEWS	User must have CAN EDIT REVIEWS.
CAN DISABLE NOTES DATESTAMP	
CAN DUPLICATE	
CAN EDIT	
CAN EDIT BOND	
CAN EDIT CHRONOLOGY	
CAN EDIT CHRONOLOGY NOTES	User must have CAN EDIT CHRONOLOGY.
CAN EDIT FEE	User must have CAN EDIT.
CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CAN EDIT INSPECTIONS	
CAN EDIT MULTICONDITION NOTES	User must have CAN EDIT MULTICONDITIONS.
CAN EDIT MULTICONDITIONS	
CAN EDIT PROFFERS	This privilege is not available to all TRAKiT implementations.
CAN EDIT REVIEW NOTES	User must have CAN EDIT REVIEWS
CAN EDIT REVIEWS	
CAN EDIT TYPE SUBTYPE	
CAN OVERRIDE PREFIX	
CAN PAY BOND	
CAN PAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN REDUCE RELEASE BOND	User must have CAN EDIT BOND
CAN UNPAY BOND	User must have CAN EDIT BOND privileges.

ProjectTRAK Privilege Title	Description
CAN UNPAY FEE	User must have CAN EDIT and CAN EDIT FEE.
CAN VIEW BOND ATTACHMENTS	
DENY ACCESS	
DENY APPLY CREDIT	
DENY FEE OVERRIDE	
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	

GeoTRAK

GeoTRAK Privilege Title	Description
CAN ADD	
CAN ADD INSPECTIONS	
CAN ATTACH AND DELETE DOCUMENTS	Additionally, users can edit the description.
CAN ATTACH AND DELETE IMAGES	Additionally, users can edit the description.
CAN CREATE SC PROJECTS	
CAN DELETE INSPECTIONS	
CAN EDIT	
CAN EDIT CUSTOM SCREENS	User must have FULL ACCESS.
CAN EDIT INSPECTION NOTES	
CAN EDIT INSPECTIONS	
CAN EDIT MAINTENANCE LOG	
CAN EDIT RESTRICTION NOTES	User must have CAN EDIT RESTRICTIONS
CAN EDIT RESTRICTIONS	User must have FULL ACCESS.

GeoTRAK Privilege Title	Description
CAN EDIT SC PROJECTS	
CAN EDIT TYPE SUBTYPE	
CAN UNLOCK A LOCKED PARCEL	
DENY ACCESS	Prevents user from accessing GeoTRAK/GeoTRAK
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	

Report Module

Report Privilege Title	Description
CAN RUN RESTRICTED REPORTS	
DENY ACCESS	Prevents the user from accessing the REPORTS module

System

System Privilege Title	Description
CAN ADD NEW GIS	
CAN CHANGE NAME	Allows the user to change his or her own name in the User Information screen.
CAN CHANGE PASSWORD	Allows the user to change their own password in the User Information screen.
CAN DELETE GIS	
CAN EDIT KEYWORDS	Allows the user to add, edit, or delete keyword definitions.
CAN EDIT AEC SETUP	Allows the user to add or edit AEC definitions
CAN EDIT CRM SETUP	Allows the user to add or edit CRM TRAK settings.

System Privilege Title	Description
CAN EDIT DLI TABLES	Allows the user to edit DLI tables
CAN EDIT FEE SCHEDULE	Allows the user to create, modify, or delete Fee Schedule items from the Utilities/Maintenance screen.
CAN EDIT GEO SETUP	Allows the user to add or edit GeoTRAK definitions
CAN EDIT INSPECTION CONTROL	Allows the user to create, modify, or delete inspection types, inspector names, and standard inspection comments.
CAN EDIT LICENSE TYPES	Allows the user to add or edit business license definitions
CAN EDIT MAIN CONTROL	Allows the user to edit the system-wide main control table (located in the CentralSquare primary database).
CAN EDIT PERMIT TYPES	Allows the user to add, edit, or delete permit type definitions.
CAN EDIT PROJECT TYPES	Allows the user to add, edit, or delete project type definitions.
CAN EDIT REVIEW CONTROL	Allows the user to create, modify, or delete Review types Reviewer names and standard review comments.
CAN EDIT STREET NAMES	Allows the user to create or edit standard street names as well as address ranges and street name aliases.
CAN EDIT SYSTEM PREFERENCES	Allows the user to edit the system-wide preferences.
CAN EDIT TIMETRAK TYPES	Allows the user to edit the TimeTRAK types.
CAN EDIT USER NAMES	Allows the user to create modify or delete other user names from the system.
CAN EDIT VALUATION SCHEDULE	Allows the user to create, modify, or delete valuation schedule items from the Utilities/Maintenance screen.
CAN EDIT VIOLATION TYPES	Allows the user to add, edit, or delete code enforcement type definitions.
CAN IMPORT EXPORT	Allows the user to select the <Import/Export> function on the Utilities/ Maintenance screen.

System Privilege Title	Description
CAN UPDATE REPORTS	Allows the user to select the <Update Standard Reports> function on the Utilities/Maintenance screen.
CAN VIEW EMARKUPS	Allows user to view eMarkups.
CAN VIEW RECENT MODS	Allows the user to view the summary of recent modifications.
CAN VOID INVOICES	Allows user to void invoices.
DENY VIEW EMARKUPS	Prevents user from viewing eMarkups
FULL ACCESS	Allows the user to edit an attachment's file description and is equivalent to granting the user all other rights (except DENY ACCESS, CAN ATTACH & DELETE DOCUMENTS, CAN ATTACH & DELETE IMAGES)
OVERRIDE DELETE ATTACHMENT LOCK	This access right overrides preference NODELETE<MODULE>ATTACHMENTS.
OVERRIDE FIN EXP LOCK	This access right overrides preference PERMITFINALED LOCK.
OVERRIDE INSPECTOR LOCK	Allows the user to edit Inspector name.
OVERRIDE UDFNOTES LOCK	Allows the user to edit read-only UDF notes.

Group Privileges

Group Privileges provides the ability to define a standard set of TRAKiT Privileges that can be applied to a user based on their assigned department or functional area.

Create a Group

1. Click Group List.
2. Click **Add**.
3. Enter a name or title.
4. (Optional) Enter a description.
5. Click **Save**. The new Group is added to the master Group Privileges list.

Assign Privileges

1. Click the group name in the Group Privileges list.
2. Select the privileges to apply to the group from the **Available Privileges**. For a list of TRAKiT privileges and their definitions, see "User Privileges."
3. Click **Save**.

Merge Documents

Merge documents provide the ability to insert data from a TRAKiT record into a Microsoft Word document template. The following is an example of a merge document.

City of Pacific Shores
Department of Community Services
2525 Pacific Shores Blvd.
Pacific Shores, CA 90001

Phone: 888.222.5555
Fax: 888.222.5885

Code Compliance

VIA CERTIFIED MAIL RETURN RECEIPT REQUESTED

«CMD.TODAY»

«contacts.OWNER.Name»
«contacts.OWNER.Address1»
«contacts.OWNER.City», «contacts.OWNER.State» «contacts.OWNER.Zip»

RE: **«CaseNo», «SiteAddress»**

Dear: «contacts.OWNER.Name»

An inspection of your property located at was made on **«LastActionDate»**.This inspection revealed a violation of the Pacific Shores City Code.

The **«UDF.YEAR», «UDF.COLOR» «UDF.MAKE» «UDF.MODEL»** must be removed from **«SiteAddress»** no later than **«FollowUpDate»**. Should you fail to clean up your property and bring it into compliance as required by law, a violation may be issued to you, which could result in a fine and/or costs being assessed against you. Please call the Department of Code Compliance at (858) 451-8680 if you have any questions.

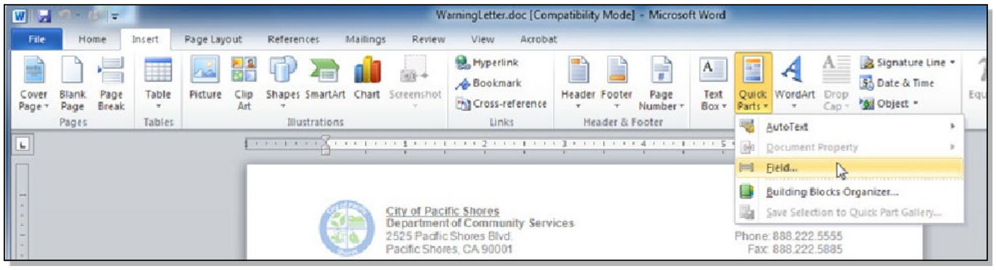
Thank you for your prompt attention to this matter.

Very truly yours,

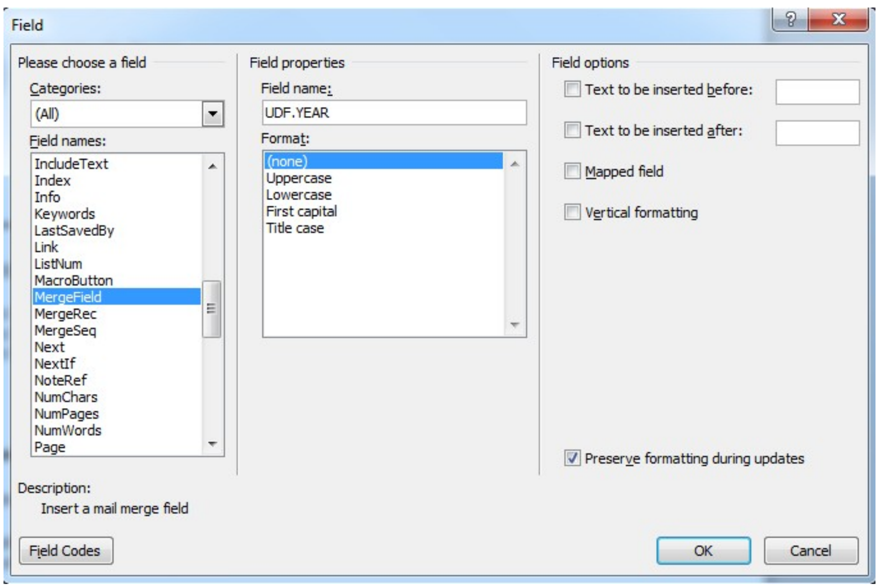
«AssignedTo»
Code Compliance Officer

Create a Merge Document

1. Open an existing or blank Microsoft Word document.
2. Insert merge fields into the document in the appropriate locations. To insert merge fields:



   a. On the **Insert** ribbon select **Quick Parts** > **Field**.
   b. Select MergeField from the Field names list.



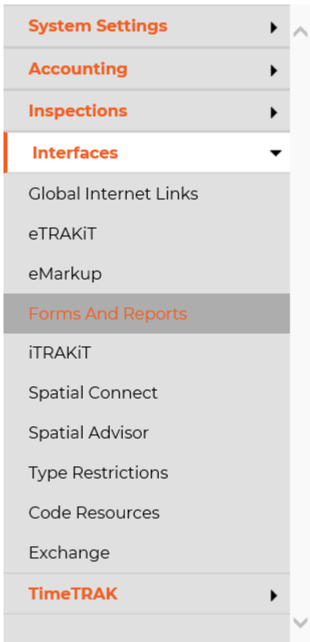
   c. Enter the TRAKiT merge document field name. For a complete list of TRAKiT field names, see “Merge Document Fields.”

      Important: Merge document fields are case sensitive. For example, to insert the CodeTRAK case number, the merge field is **CaseNo**.

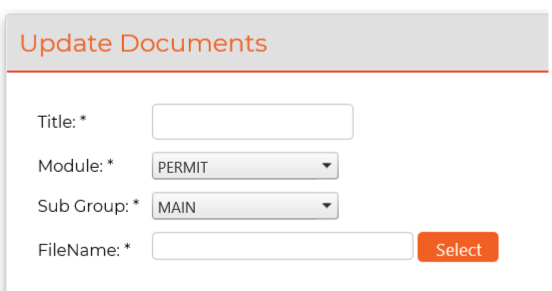
   d. Click **OK**.
   e. Repeat for each merged field.
   f. Save the document.

Add a Merge Document to TRAKiT

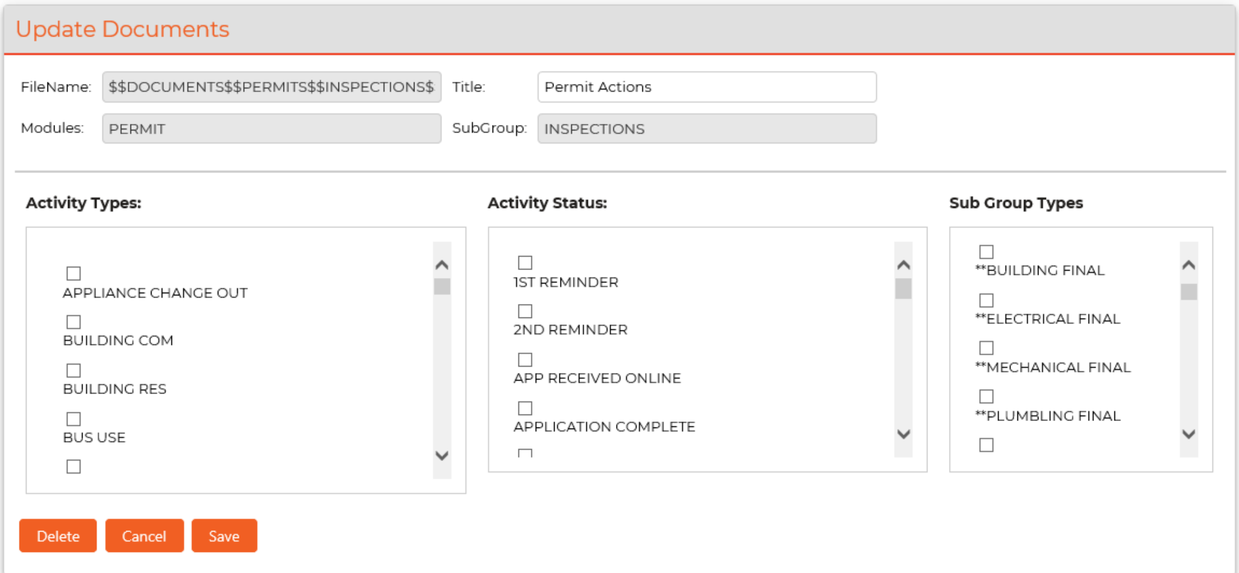
1. In WUM, navigate to System Settings > Interfaces > Forms And Reports.



2. Click Select.



3. Navigate to the merge document and click Open.
4. Enter a title for the document. The user will see this title in the TRAKiT application.
5. Select the TRAKiT module.
6. Select an option in the **Sub Group** field. The default subgroup is main. This enables the user to generate the document from the Print function.
7. Click **Save & Next**.



8. Select options in the Activity Types, Activity Status, and Sub Group Types panes. If no activity types are selected, the document is available from all activity types.
9. Click **Save**.

Changing the Properties of an Existing Merge Document

1. Open Utilities and Maintenance.
2. Select **Merge Documents** from the left navigation pane.
3. Click the module name.
4. Select the document.
5. Update the properties as required.
6. Click **Save**.

Merge Document Fields

AEC TRAK

ActivityNo
Address1
Address2
AECSubType
AECType
AppliedDate
BalanceDue
BusLic1Agency
BusLic1Expire
BusLic1Issue
BusLic1No
BusLic2Agency
BusLic2Expire
BusLic2Issue
BusLic2No
City
Company
Contact1
Contact2
Contact3
CoOwnerName
DefaultPayer
Email
Fax
FeesCharged
FeesPaid
Hold
HoldNotes
LicCategory1
LicCategory2
LicGrade1
LicGrade2
LicGrade3
LicGrade4
LicGrade5
LicGrade6
LocationRecordID
Notes
OwnerName
ParentAECStLicNo
Password
PasswordChangeDate
Phone1
Phone2
Phone3
PIN
RecordID
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
State
Status
StatusName
StLicExpire
StLicIssue
StLicNo
SubTypeName
TaxID
TrustAcctBalance
TrustAcctNo
TypeName
WebSite
Zip

CodeTRAK

ActivityNo
AssignedTo
BalanceDue
CaseLocation
CaseName
CaseNo
CaseSubType
CaseType
ClosedBy
ClosedDate
CodeSection
ComplainantName
DefaultInspector
DefaultPayer
Description
FeesCharged
FeesPaid
FeesSelected
FollowUpBy
FollowUpDate
GroupImage
HasGeoRecordLock
HasGeoRestrictions
HistoricalAPN
HowReceived
LastActionBy
LastActionDate
LocationRecordID
LockID
MaskedSiteAPN
OtherBy1
OtherDate1
OwnerName
ParentLicenseNo
ParentPermitName
ParentPermitNo
ParentProjectName
ParentProjectNo
Prefix
RecordID
ReferredTo
ResidentName
Selected
SeqNo
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStreetID
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
StartedBy
StartedDate
Status
StatusName
SubTypeName
TypeName
YRMO

GeoTRAK

ActivityNo
BalanceDue
BldgData01
BldgData02
BldgData03
BldgData04
BldgData05
BldgData06
Census
Coord_X
Coord_Y
DefaultCaseInspector
DefaultCaseOfficer
DefaultInspector
DefaultLicenseInspector
DefaultPayer
DefaultPermit2Inspector
DefaultPermitInspector
DefaultProjectInspector
FeesCharged
FeesPaid

FeesSelected
GeneralPlan
GeoType
GroupImage
HistoricalAPN
ImprovedValue
IsChanged
LandUse01
LandUse02
LandUse03
LandUse04
LandUse05
LandUse06
LandValue
LegalDescription
LocationRecordID
Locked
LotSizeSF
MaskedSiteAPN
MultiAddress
NumberOfBathrooms
NumberOfBedrooms
NumberOfStories
NumberOfUnits
OwnerAddress1
OwnerAddress2
OwnerCell
OwnerCity
OwnerConfidentiality
OwnerCountry
OwnerEmail
OwnerFax
OwnerFirst
OwnerLast
OwnerName
OwnerPager
OwnerPhone
OwnerState
OwnerZip
ParentLocationRecordID
ParentSiteAddress
ParentSiteAPN
RecordID
RestrictionNotes
RestrictionOtherNotes
RestrictionType
SchoolDistrict
SectionTwpRng
Selected
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStName
SiteStPrefix
SiteStreetID
SiteStreetName
SiteStSuffix
SiteStType
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
Status
StatusName
StructureSF
SubTypeName
TotalValue
TRA
TypeName
YearBuilt
ZoneCode1
ZoneCode2

LicenseTRAK

ActivityNo
BalanceDue
CheckBox1
CheckBox2
CheckBox3
CheckBox4
CheckBox5
CheckBox6
CheckBox7
CheckBox8

Classification
Company
CompanyPrintAs
DefaultInspector
DefaultPayer
Email
EmergencyPhone
ExpiredBy
ExpiredDate
Fax
FeesCharged
FeesPaid
HasGeoRestrictions
HistoricalAPN
IssuedBy
IssuedDate
LiabilityCarrier
LiabilityExpiresDate
LiabilityIssuedDate
LiabilityNumber
LicenseNo
LicenseSubType
LicenseType
LocationRecordID
LockID
MailAddress1
MailAddress2
MailCity
MailState
MailZip
MainTextField1
MainTextField2
MainTextField3
MainTextField4
MainTextField5
MainTextField6
MainTextField7
MainTextField8
NumberOfEmployees
OwnerName
OwnershipType
ParentLicenseNo
ParentRecordID
Phone
Prefix
RecordID
ReferenceNo
ResaleID
Selected
SeqNo
SIC1
SIC2
SIC3
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStNo
SiteStreetID
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip

StateLicenseExpiresDate
StateLicenseIssuedDate
StateLicenseNumber
Status
StatusBy
StatusName
SubTypeName
Tag
TaxID
TextField1
TextField2
TextField3
TextField4
TextField5
TextField6
TextField7
TextField8
TypeName
WorkersCompensation
WorkersCompensationExpiresDate
WorkersCompensationIssuedDate
WorkersCompensationNumber
YRMO

PermitTRAK

ActivityNo
ApplicantName
ApplicationNo
AppliedBy
AppliedDate
ApprovedBy
ApprovedDate
BalanceDue
Bldg2SF
BldgSF
Census
ConstType
ContractorName
DefaultInspector
DefaultPayer
Description
ExpiredBy
ExpiredDate
FeeAdjustments
FeesCharged
FeesPaid
FinaledBy
FinaledDate
FWDodge
Gar2SF
GarSF
GroupCode
HasGeoRestrictions
Height
HistoricalAPN
IssuedBy
IssuedDate
JobValue
LocationDesc
LocationRecordID
LotSF
MaskedSiteAPN
NoBldgs
NoStories
Notes
NoUnits
OccupancyType
OtherBy1
OtherDate1
OwnerName
ParentPermitName
ParentPermitNo
ParentProjectName
ParentProjectNo
PermitNo
PermitSubType
PermitType
PlanCheckNo
Porch2SF
PorchSF
Prefix
RecordID
ReferenceNo
School
SeqNo

SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteState
SiteStNo
SiteStreetID
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
Status
StatusName
SubTypeName
TaxRateArea
TypeName
ValidFor
YRMO
ZoningCode1
ZoningCode2

ProjectTRAK

ActivityNo
ApplicantName
AppliedBy
AppliedDate
ApprovedBy
ApprovedDate
BalanceDue
ClosedBy
ClosedDate
ContractorName
DefaultInspector
DefaultPayer
Description
DeveloperName
ExpiredBy
ExpiredDate
FeesCharged
FeesPaid
FeesSelected
GenPlan
HasGeoRestrictions
HistoricalAPN
LandUse
LocationRecordID
MaskedSiteAPN
OtherBy1
OtherDate1
OwnerName
ParentProjectName
ParentProjectNo
Planner
Prefix
PrimaryPin
ProjectLoc
ProjectName
ProjectNo
ProjectSubType
ProjectType
RecordID
ResolutionNo
SeqNo
SiteAddress
SiteAlternateID
SiteAPN
SiteBlock
SiteCity
SiteDescription
SiteGeotype
SiteLotNo
SiteNumber
SiteOwner
SiteState
SiteStreetID
SiteStreetName
SiteSubdivision
SiteTract
SiteUnitNo
SiteZip
Status
StatusBy
StatusDate
StatusName
SubTypeName
TypeName
YRMO
Zoning

User-Defined Fields (UDF)

Syntax: UDF.[field name]

Example: UDF.MODEL

For more information about creating user-defined fields, see “Adding Data Fields.”

Contacts

Syntax: CONTACTS.[property] - for any contact CONTACTS.[CONTACTTYPE].[property] - for a specific contact

Example: CONTACTS. OWNER.ActivityNo

CONTACTS.ActivityNo

CONTACTS.Address1

CONTACTS.Address2

CONTACTS.BusLicense

CONTACTS.Cell

CONTACTS.City

CONTACTS.Confidentiality

CONTACTS.CONTACTSummary

CONTACTS.Country

CONTACTS.Email

CONTACTS.Fax

CONTACTS.Geo_ActivityNo

CONTACTS.ID

CONTACTS.LocationRecordID

CONTACTS.Name

CONTACTS.NameType

CONTACTS.OtherName

CONTACTS.Pager

CONTACTS.Phone

CONTACTS.RecordID

CONTACTS.SiteAPN

CONTACTS.State

CONTACTS.Zip

Chronology

Syntax: ACTIONS.[property] - for any action ACTIONS.[ACTIONTYPE].[property] - for a specific action

Example: ACTIONS.EMAIL.ACTIONDate

ACTIONS.ACTIONBy

ACTIONS.ACTIONDate

ACTIONS.ACTIONDateString

ACTIONS.ACTIONDescription

ACTIONS.ACTIONType

ACTIONS.ActivityNo

ACTIONS.CompletedDate

ACTIONS.CompletedDateString

ACTIONS.IsVoided

ACTIONS.RecordID

ACTIONS.SiteAddress

Inspections

Syntax: INSPECTIONS.[property] - for any inspections INSPECTIONS.[INSPECTIONTYPE].[property] - for a specific inspection

Example: INSPECTIONS.R-FRAME.DefaultInspector

INSPECTIONS.ActivityNo

INSPECTIONS.City

INSPECTIONS.CompletedDate

INSPECTIONS.CompletedDateString

INSPECTIONS.CompletedTime

INSPECTIONS.CreatedBy

INSPECTIONS.CreatedDate

INSPECTIONS.CreatedTime

INSPECTIONS.DefaultInspector

INSPECTIONS.Duration

INSPECTIONS.DurationEst

INSPECTIONS.HasFeeBalance

INSPECTIONS.HasNotes

INSPECTIONS.INSPECTIONTrade

INSPECTIONS.INSPECTIONType

INSPECTIONS.Inspector

INSPECTIONS.InspectorName

INSPECTIONS.IsVoided

INSPECTIONS.Notes

INSPECTIONS.RecordID

INSPECTIONS.Remarks

INSPECTIONS.Result

INSPECTIONS.ScheduledDate

INSPECTIONS.ScheduledDateString

INSPECTIONS.ScheduledTime

INSPECTIONS.SEQID

INSPECTIONS.SiteAddress

INSPECTIONS.SiteStreetNameNumber

Reviews

Syntax: REVIEWS.[property] - for any review REVIEWS.[REVIEWTYPE].[property] - for a specific review

Example: REVIEWS.BUILDING.ContactName

REVIEWS.ActivityNo

REVIEWS.Contact

REVIEWS.ContactID

REVIEWS.ContactName

REVIEWS.DueDate

REVIEWS.DueDateString

REVIEWS.IsVoided

REVIEWS.Notes

REVIEWS.ParentDescription

REVIEWS.ReceivedDate

REVIEWS.ReceivedDateString

REVIEWS.RecordID

REVIEWS.Remarks

REVIEWS.REVIEWType

REVIEWS.SentDate

REVIEWS.SentDateString

REVIEWS.Status

Violations

Syntax: VIOLATIONS.[property] - for any violation VIOLATIONS.[VIOLATIONTYPE].[property] - for a specific violation

Example: VIOLATIONS.USE PERMIT VIOLATION.ViolationNotes

VIOLATIONS.CaseNo

VIOLATIONS.RecordID

VIOLATIONS.Notes

VIOLATIONS.ViolationType

Conditions

Syntax: CONDITIONS.[property] - for any condition CONDITIONS.[CONDITIONTYPE].[property] - for a specific condition

Example: CONDITIONS.LANDSCAPING.DateRequired

CONDITIONS.ActivityNo

CONDITIONS.Notes

CONDITIONS.ConditionLocation

CONDITIONS.ConditionType

CONDITIONS.Contact

CONDITIONS.DateAdded

CONDITIONS.DateAddedString

CONDITIONS.DateRequired

CONDITIONS.DateRequiredString

CONDITIONS.DateSatisfied

CONDITIONS.DateSatisfiedString

CONDITIONS.Department

CONDITIONS.IsVoided

CONDITIONS.RecordID

CONDITIONS.Remarks

CONDITIONS.Seq_No

CONDITIONS.Status

CONDITIONS.UserID

Restrictions

Syntax: RESTRICTIONS.[property] - for any restriction
RESTRICTIONS.[RESTRICTIONTYPE].[property] - for a specific restriction

--Restriction types are **HOLD**, **NONE**, and **WARNING**

Example: RESTRICTIONS.NONE.DateAdded

RESTRICTIONS.ActivityNo

RESTRICTIONS.DateAdded

RESTRICTIONS.DateAddedString

RESTRICTIONS.DateCleared

RESTRICTIONS.DateClearedString

RESTRICTIONS.LocationRecordID

RESTRICTIONS.RecordID

RESTRICTIONS.RESTRICTIONNotes

RESTRICTIONS.RESTRICTIONOtherNotes

RESTRICTIONS.RestrictionType

RESTRICTIONS.SiteAPN

RESTRICTIONS.UserAdded

RESTRICTIONS.UserCleared

Commands

Syntax: CMD.[COMMANDNAME]

Example: CMD.TODAY

TODAY—Todays Date

DATE1—1 day from today

DATE7—7 days from today

DATE10—10 days from today

DATE15—15 days from today

DATE30—30 days from today

DATE60—60 days from today

DATE90—90 days from today

USER—User name

USERID—User ID

TIMESTAMP—Timestamp

CRM TRAK Email Templates

Module Configuration > CRM TRAK > Auto eMail Keywords

Lists the available CRM TRAK fields and their associated keywords.

To create a CRM TRAK email template:

1. Open Windows Notepad, or any text editor.
2. The first line of text in the file is placed in the subject of the email.
3. The second and subsequent lines of text are placed in the body of the email. Enter text and CRM TRAK keywords as needed. A complete list of CRM TRAK key words is available in **Module Configuration** > **CRM TRAK** > **Keywords**. The following is an example of an email template:

    New CRM TRAK Record

    A new CRM TRAK record has been created: Issue #: [ISSUE]

    Type: [ISSUE_TYPE]

    Category: [CATEGORY] Title: [TITLE]

    Created Via: [CREATEDVIA]

    Due Date: [DUE_DATE]

    Issue Address: [ISSUE_ADDRESS]

4. Save the file (filename.txt) to: \\file server\DOCUMENTS.