CENTRALSQUARE

TECHNOLOGIES

TRAKiT.NET
System Administrator

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TRAKiT System Administration

TRAKiT System Administrators

CentralSquare maintains an email list of TRAKiT System Administrators. TRAKiT System Administrators are notified about software and licensing updates, as well as CentralSquare sponsored events. To add, change, or remove a TRAKiT System Administrator from our email list, contact the TRAKiT Support team.

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 thru 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:

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.

About this Manual

This document uses stylistic conventions to enhance your access to information.

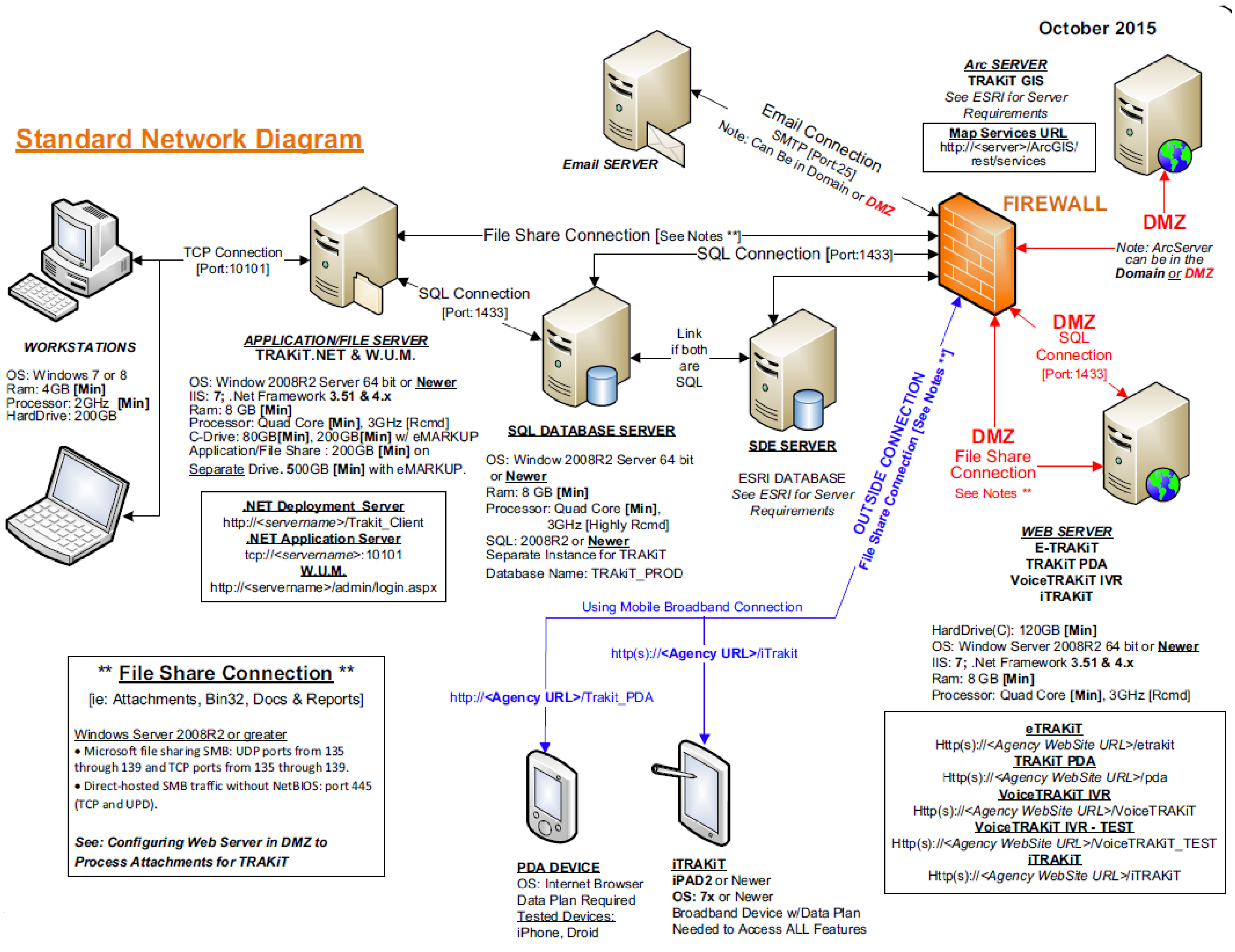
- Button, tab, menu, and field names appear in bold formatting.

  Example: Click **OK**.

- Tips contain information that is not essential to a procedure but may prove useful, including notes about special cases or setup-related variables, alternative methods, and benefits or suggested uses of program features.

  Example:

  Tip: Perform a database structure check on all databases when upgrading to a new version of TRAKiT.

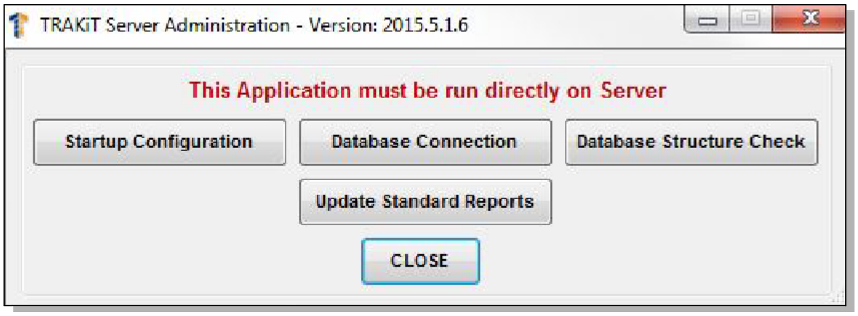


October 2015
Standard Network Diagram
Email SERVER
Email Connection
SMTP [Port:25]
Note: Can Be in Domain or DMZ
Arc SERVER
TRAKiT GIS
See ESRI for Server Requirements
Map Services URL
http://<server>/ArcGIS/rest/services
FIREWALL
DMZ
Note: ArcServer can be in the Domain or DMZ
WORKSTATIONS
OS: Windows 7 or 8
Ram: 4GB [Min]
Processor: 2GHz [Min]
HardDrive: 200GB
TCP Connection [Port:10101]
File Share Connection [See Notes **]
SQL Connection [Port:1433]
SQL Connection [Port: 1433]
APPLICATION/FILE SERVER
TRAKiT.NET & W.U.M.
OS: Window 2008R2 Server 64 bit or Newer
IIS: 7; .Net Framework 3.51 & 4.x
Ram: 8 GB [Min]
Processor: Quad Core [Min], 3GHz [Rcmd]
C-Drive: 80GB[Min], 200GB[Min] w/ eMARKUP
Application/File Share : 200GB [Min] on Separate Drive. 500GB [Min] with eMARKUP.
.NET Deployment Server
http://<servername>/Trakit_Client
.NET Application Server
tcp://<servername>:10101
W.U.M.
http://<servername>/admin/login.aspx
Link if both are SQL
SQL DATABASE SERVER
OS: Window 2008R2 Server 64 bit or Newer
Ram: 8 GB [Min]
Processor: Quad Core [Min], 3GHz [Highly Rcmd]
SQL: 2008R2 or Newer
Separate Instance for TRAKiT
Database Name: TRAKiT_PROD
SDE SERVER
ESRI DATABASE
See ESRI for Server Requirements
DMZ
SQL Connection
[Port:1433]
DMZ
File Share Connection
See Notes **
OUTSIDE CONNECTION
File Share Connection [See Notes **]
WEB SERVER
E-TRAKiT
TRAKiT PDA
VoiceTRAKiT IVR
iTRAKiT
HardDrive(C): 120GB [Min]
OS: Window Server 2008R2 64 bit or Newer
IIS: 7; .Net Framework 3.51 & 4.x
Ram: 8 GB [Min]
Processor: Quad Core [Min], 3GHz [Rcmd]
eTRAKiT
Http(s)://<Agency WebSite URL>/etrakit
TRAKiT PDA
Http(s)://<Agency WebSite URL>/pda
VoiceTRAKiT IVR
Http(s)://<Agency WebSite URL>/VoiceTRAKiT
VoiceTRAKiT IVR - TEST
Http(s)://<Agency WebSite URL>/VoiceTRAKiT_TEST
iTRAKiT
Http(s)://<Agency WebSite URL>/iTRAKiT
Using Mobile Broadband Connection
http(s)://<Agency URL>/iTrakit
http://<Agency URL>/Trakit_PDA
PDA DEVICE
OS: Internet Browser
Data Plan Required
Tested Devices:
iPhone, Droid
iTRAKiT
iPAD2 or Newer
OS: 7x or Newer
Broadband Device w/Data Plan
Needed to Access ALL Features
** File Share Connection **
[ie: Attachments, Bin32, Docs & Reports]
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 for TRAKiT

TRAKiT Server Administration

TRAKiT Server Administration is a program that allows you to make various administrative changes to TRAKiT and eTRAKiT (see the *eTRAKiT System Administrator Guide* for configuration).

Launch the TRAKiT Server application by double-clicking the TRAKiT server icon ( ).

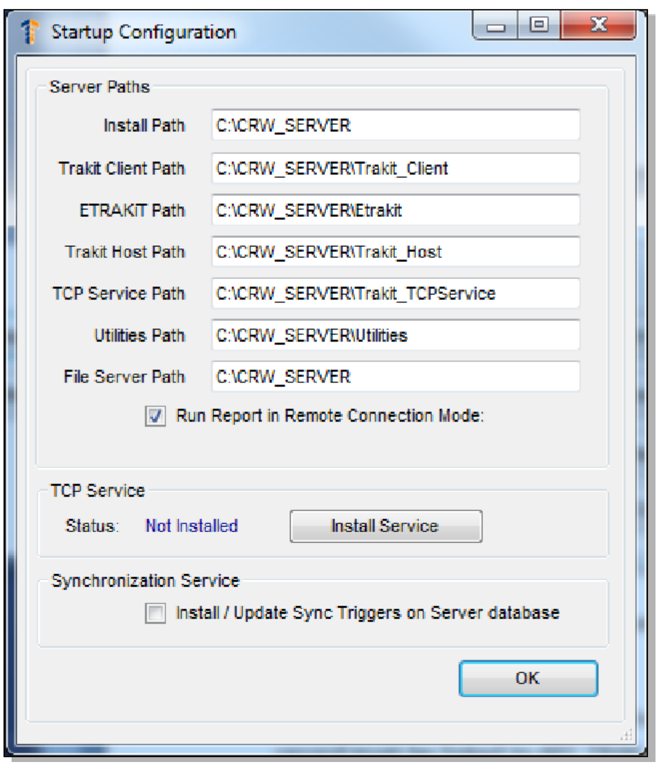


Note: You can only run the TRAKiT Server Administration application directly on the application server. Also, the Windows user must be an administrator with full access to the registry in order to open the **Startup Configuration**, **Database Connection** and **eTRAKiT Configuration**.

Tip: Press **Alt+R** from the TRAKiT Server Administration Screen to auto-populate the **Record Id** field.

Startup Configuration

Startup configuration sets the TRAKiT path locations, TCP Service, and Synchronization Services.



Server Paths Set at Installation

- **Install Path** sets the location where the TRAKiT Server application is installed.
- **TRAKiT Client Path** sets the location where the client (user workstations) will look to update the TRAKiT application.
- **eTRAKiT Path** sets the location where the eTRAKiT application is installed.
- **TRAKiT Host Path** sets the location where the TRAKiT application is installed.
- TCP Service Path displays the TCP Service location. For more information about configuring the TCP connection, see “Set up a TCP Connection.”
- **Utilities Path** displays where the TRAKiT Utilities folder is located.
- **File Server Path** displays the File Server location.

Run Reports in Remote Connection Mode

- Enabled is the default setting.

TCP Service

- Click to install the TCP service. For more information about the TCP service, see “TCP Connection.”

Synchronization Services

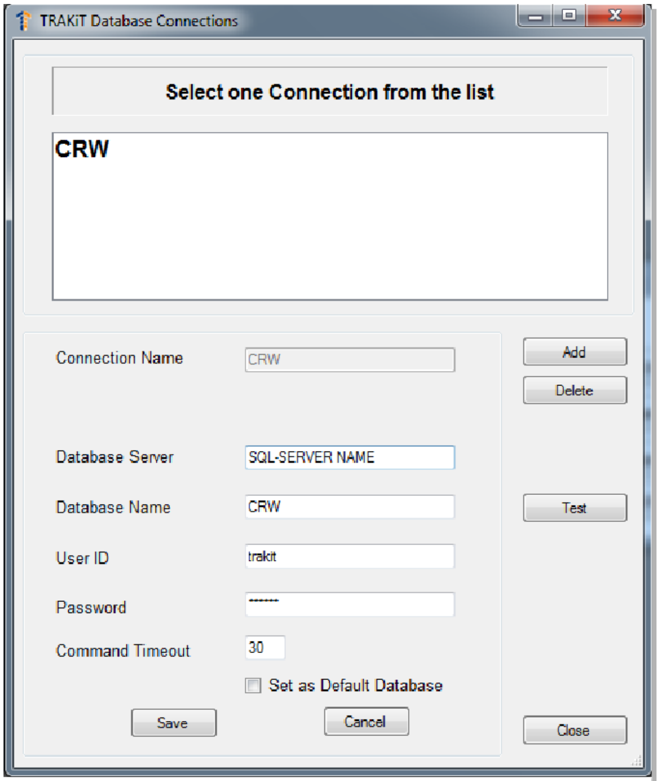
- Synchronizes data between the TRAKiT database and a remote mobile computer.

  Important: Do *not* enable this feature without specific instructions from CentralSquare.

Database Connection

Defines the connection string to the database.

Tip: This is where you can add a test or training database.



Add a Database Connection

1. Select the **Add** button.
2. Type a name in the **Connection Name** field.
3. Enter the name of the database server.
4. Enter the name of the database.
5. Enter the SQL Server user name for the TRAKiT database.
6. Enter the SQL Server user name password for the TRAKiT database.
7. Command Timeout (default is 30 seconds). Cancels the executing command for the connection if it does not respond within the specified time.
8. Select **Set as Default Database** if there is more than one database connection and this connection is the default.
9. Select **Save**.

Change the Default Database

1. Select the database to set as the default.
2. Select **Set as Default Database**.
3. Select **Save**.

Database Structure Check

This allows an Administrator to verify the database structure. This will ensure that the database structure matches the current version of TRAKiT.

> **Tip**: If you have more than one database, you will be presented with a full list of databases.
>
> **Tip**: Perform a database structure check on all databases when upgrading to a new version of TRAKiT.

eTRAKiT Database

This sets the default database for eTRAKiT.

eTRAKiT Configuration

Refer to the eTRAKiT guide.

Web Utilities & Maintenance (WUM)

This opens the TRAKiT Web Utilities & Maintenance (WUM) application.

Web Map Configuration

This sets the default web map parameters.

Update Standard Reports

This updates all of TRAKiT's standard reports to the most current version available.

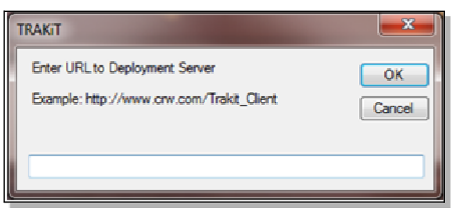
> **Tip**: This is also presented as an option to select when you update TRAKiT software.

TRAKiT Enterprise Client Installation

Install the TRAKiT Enterprise client on a workstation:

1. Open a web browser window on the client machine and enter: http://<YourApplicationServerName>/TRAKiT_Client
2. Click **Full Install** on the TRAKiT Enterprise Installation screen and follow the instructions.
3. Close the web browser after TRAKiT finishes installing the client software.
4. Double-click the TRAKiT Enterprise icon.
5. Enter the web address of the TRAKiT Deployment Server:

   http://<YourApplicationServerName>/TRAKiT_Client

6. Click **OK**.
7. On the TRAKiT Application Server screen, delete the predefined website address.
8. Enter the address of the TRAKiT application server:

   tcp://<YourApplicationServerName>:10101

Note: TRAKiT is configured to use a TCP connection between the application server and the client computer. Contact the TRAKiT Support team if you have questions concerning this connection. For more information about the TCP connection see “TCP Connection.”

9. Click **OK**.
10. After the installation is complete, the TRAKiT logon screen appears.

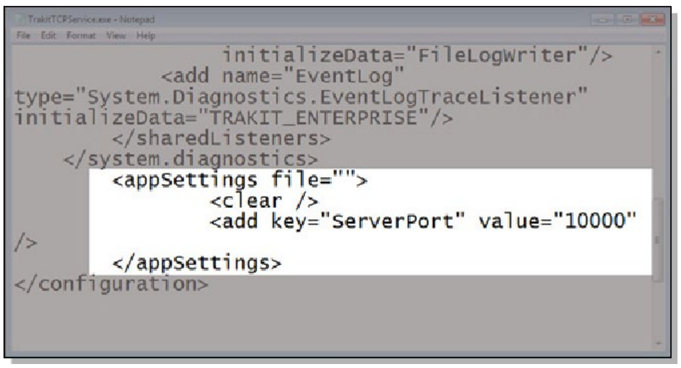
TCP Connection

TRAKiT.Net can be configured to communicate with the application server via TCP/IP or HTTP.

The TCP connection is installed on the Application Server using TRAKiT Server Administration. Access to TCP requires a server administrator account.

Set up a TCP Connection

1. Open File Explorer.
2. Navigate to the TRAKiT TCP service folder on the application server (\\<YourAppServer>\TRAKiT\TRAKiT_TCPService).
3. Open **TRAKiTTCPService.exe.config** in Windows Notepad.

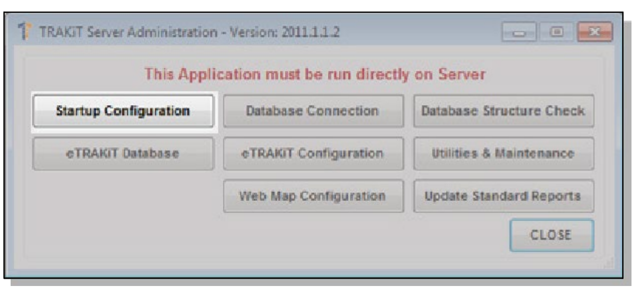


```
                 initializeData="FileLogWriter"/>
            <add name="EventLog"
type="System.Diagnostics.EventLogTraceListener"
initializeData="TRAKIT_ENTERPRISE"/>
        </sharedListeners>
    </system.diagnostics>
        <appSettings file="">
                <clear />
                <add key="ServerPort" value="10000"
/>
        </appSettings>
</configuration>
```

4. Locate the following line, <add key="ServerPort" value = "10000" />.
5. Change value = "10000" to value = "10101".
6. Save file and exit Windows Notepad.
7. Double-click the TRAKiT Server Admin icon.

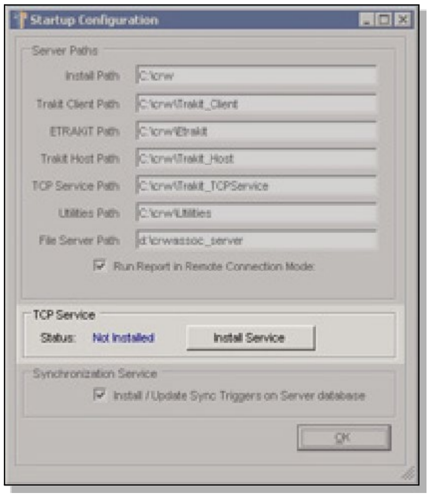
Tip: On Windows Server 2008 R2 64 bit, right-click the TRAKiT Server Admin shortcut and select **Run As Administrator** to install TCP.

8. Click **Startup Configuration**.



9. Click **Install Service**.
10. Click **Yes** on the **Do You Want to Start the TCP Service** dialog box.
11. The service is installed and the log file (InstallUtil.InstallLog) is added on the desktop.

Tip: A dialog box opens if the TCP service cannot be started. See "TCP Troubleshooting."

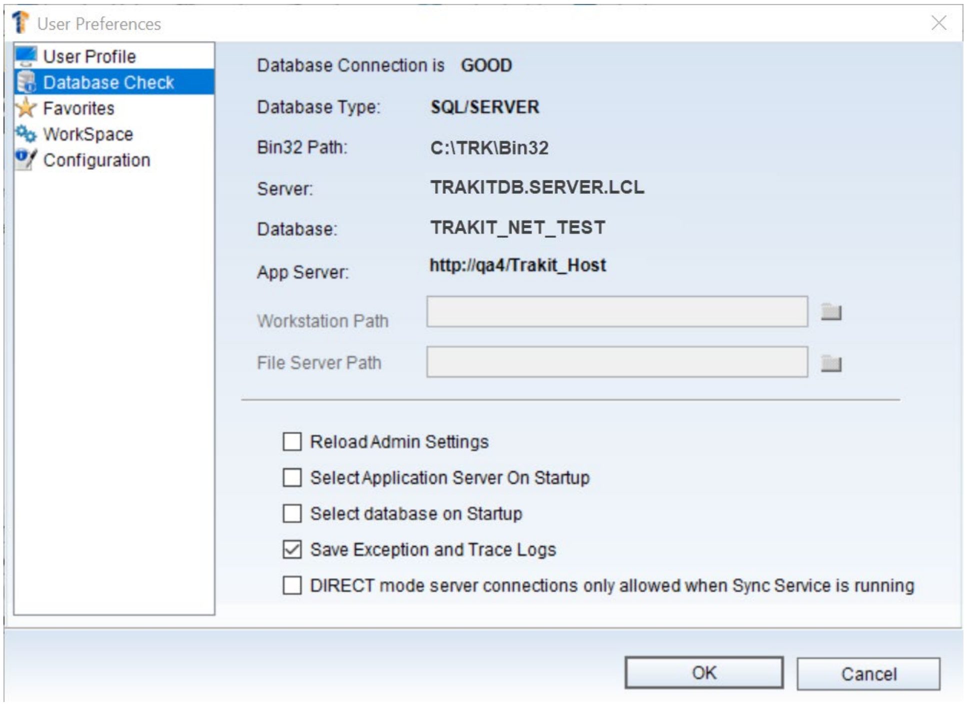


12. If the service starts correctly, the TCP Service Status is Running.

Change a TRAKiT Client from an HTTP to a TCP Connection

Note: This section is only for TRAKiT Client installations that are currently using HTTP. Any new TRAKiT Client installations should follow the TRAKiT Enterprise Client Installation instructions.

1. Start TRAKiT client.
2. Click on **User** name.
3. Click on **Database Check**.
4. Enable **Select Application Server on Startup**.
5. Click **Ok**.
6. Close TRAKiT.
7. Restart TRAKiT.
8. Click **Add** on the **Application Server** window.
9. Enter the TCP address of the TRAKiT application server.
   tcp://<YourApplicationServerName>:10101
10. Click **OK**.
11. Click **OK** on the **Application Server** window.
12. To verify that the client is using the TCP service:
    a. Open the **User Preferences** screen.
    b. Select **Database Check**.
    c. Verify that the TCP connection is displayed in App Server.
    d. Clear the **Select Application Server on Startup** check box.
    e. Click **OK**.



TCP Troubleshooting

If the **There was an issue with starting the service** dialog box, it usually means:

- The default TCP Port is being used, or
- The user does not have the proper windows permissions to install a service
- The port needs to be opened in the firewall.

Configure TRAKiT TCP to Use a Different Port

1. Open File Explorer.
2. Navigate to the TRAKiT TCP service folder on the application server (\\<YourAppServer>\TRAKiT\TRAKiT_TCPService).
3. Open **TRAKiTTCPService.exe.config** in Windows Notepad.
4. Locate the following line, **<add key=”ServerPort” value = “10101” />**.
5. Change **value = “10101”** to **value = “<New Port Number>”**.
6. Save the file and exit Windows Notepad.
7. Double-click on the TRAKiT Server Admin icon.
8. Click **Startup Configuration**.
9. Click **Start Service**.

   Note: The status should change from **Stopped** to **Running**. Make a note of the port number, which you need to configure the workstations.
10. Follow the instructions in “Change a TRAKiT Client from an HTTP to a TCP Connection to configure each workstation.

Server Update

CentralSquare will periodically release TRAKiT software updates that include both enhancements and fixes. System Administrators will be notified by email when updates are available for download.

The software update will include a Release Notes document that outlines the new features and fixes. To be included on the mailing list, please ensure that you are registered as a TRAKiT System Administrator with CentralSquare. For more information about registering with CentralSquare, see TRAKiT System Administrators."

In preparation for the server update:

1. Ensure all users are logged off TRAKiT.
2. Stop TCP service (if applicable).

Download the update

1. Log in to the Customer Support website at support.centralsquare.com.
2. Download the update (e.g., TraktServerUpdate_2011_1_1_Release.exe) and Release Notes (e.g., Customer Release Notes 2011.1.1.pdf) to the updates folder (\\<appserver>\trakit\updates) on your application server.

Install the update

1. Double-click the update.
2. Click **Next**.
3. Verify the destination folder and click **Next**.
4. Verify the setup type (the default is Server Update) and click **Next**.

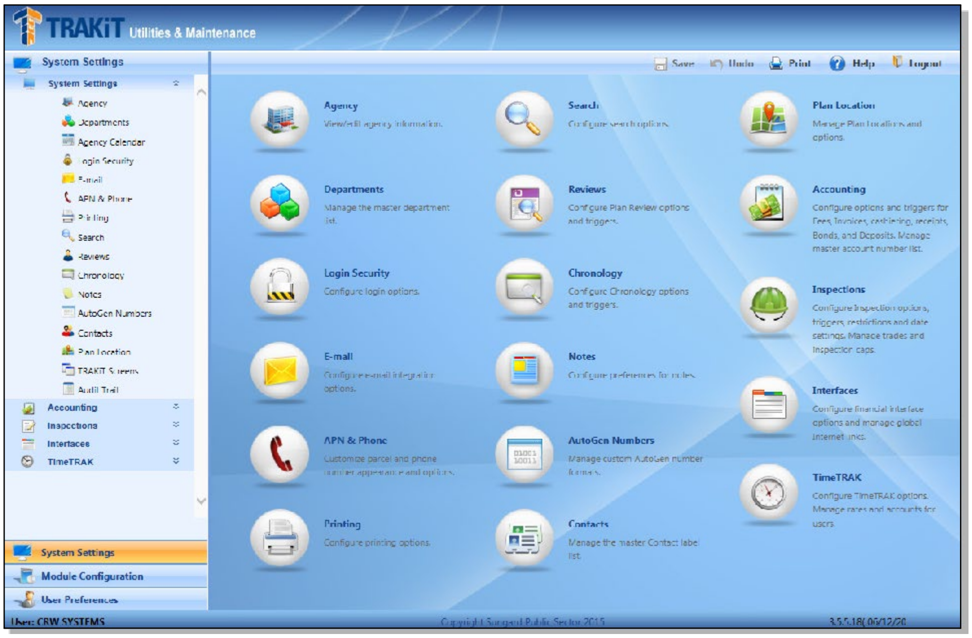
   Tip: **New Server Install** is used for the initial installation of TRAKiT. **Custom** enables you to to select specific TRAKiT components.
5. Click **Install**.
6. Click **Finish**.
7. Click **Yes**.

   Note: A database structure check should always be run when an update is applied. This ensures your database structure is consistent with the current version of the TRAKiT client and all tables are correctly keyed and record identifiers assigned.
8. Click **OK** when the database structure check is finished.
9. Click **Yes** (installs the latest version of the standard TRAKiT reports and documents; does not affect your agency's custom reports).

Web Utilities & Maintenance (WUM) Interface

Interface Overview

The following diagram illustrates common elements in the interface:



- The tool bar provides quick access to common functions (e.g., Save, Undo, Print, and Help).
- The left navigation pane provides access to the sections of WUM.

Save Changes

Select **Save** ( ) on the top menu bar to save any changes made to the current screen.

> **Tip**: In the lower right corner of the screen, the user ID and date of the last recorded change displays.
> **Tip**: Saved changes are visible to the TRAKiT user the next time they log into TRAKiT, after the change is made.

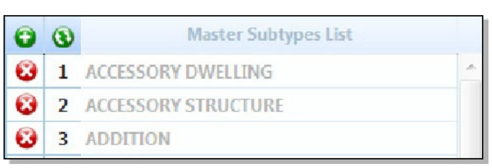
Undo Changes

Select **Undo** ( ) on the top menu bar to discard any changes made since the last save.

Print

Select **Print** ( ) on the top menu bar to print the contents of a screen.

The following is a list of common features when working with entries in the WUM grids:



Add Object

To add an object to a grid, select **Add** ( ).

Delete Object

To delete an object from the grid, select **Delete** ( ).

Reorder List

There are three methods to reorder a list:

Method 1:

1. Click an item to select it.
2. Click and hold the left mouse button.
3. While continuing to hold the left mouse button down, drag the item to its new location.

Method 2:

1. Change the number in the order column to indicate the new position for the item.
2. Select **Reorder** ( ).

Method 3:

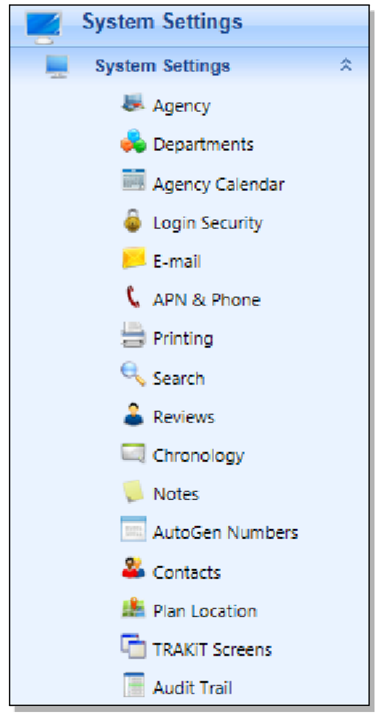
1. Click on the column heading to sort the column in either ascending or descending order.
2. Select **Save**.

System Settings

System Settings

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

- Agency information
- Department(s) information
- Agency Calendar
- Login Security
- Email configuration
- APN & Phone: parcel and telephone number masks
- Printing configuration
- Search configuration
- Reviews
- Chronology
- Notes
- AutoGen Numbers: auto-generated numbers
- Contacts
- Plan Location
- TRAKiT Screens
- Audit Trail



Agency

The Agency screen contains TRAKiT licensing and agency information.

Agency Information

Agency information provides the ability to define the agency address including city, state, and zip code, as well as phone and fax numbers.

- **Name**: This field is displayed on the TRAKiT Main screen and is controlled by the TRAKiT key.

  Note: To change the name listed in this field, a new TRAKiT key must be requested from CentralSquare.

The following agency information is manually entered:

- Address
- City
- State
- Zip Code
- Phone Number
- Fax Number

- **Display Name**: This field is displayed on the TRAKiT main screen below the agency name.

License Key

- **Expires**: Expiration date of the TRAKiT Key.
- **Licenses**: Total number of TRAKiT user licenses.
- **Licenses in Use**: Total number of licenses currently in use.
- **Current Activity**: Provides a link to in **User Preferences** > **Current Activity**. For more information, see "Current Activity."

Departments

Departments defines the master list of agency departments used throughout the TRAKiT application.

Add a New Department

1. Select the **Add** button.
2. Enter a title in the added **Departments** field.
3. Select **Save**.

Delete an Existing Department

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

   Tip: TRAKiT provides the ability to limit the types of records that a user can create based on the assigned department. For more information about configuring TRAKiT to employ this feature, see "Departments."

Agency Calendar

The agency calendar provides the ability to define operational and nonoperational days for the purpose of inspection scheduling.

This feature defines the beginning and end of the workday for inspection scheduling.

To set the agency hours, select the **Work Day Start Time** and **Work Day End Time** from the lists.

Inspection Scheduling Validation

Validate Inspection Scheduled and Completed Dates with Work Dates Calendar: The inspection scheduled and completed dates are compared to the calendar to validate whether the date the user enters is a workday.

Configure the Agency Calendar

TRAKiT provides the ability to define the agency **Work** and **Non-Work** days for a 12-month period.

1. Select the **Set** button. This will automatically set all weekends, January 1, July 4, and December 25 as non-workdays for the next six months.
2. Set unique workdays/non-workdays not included in step 1 by clicking on the date. From the drop-down, select one of the following options:
   - **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, selected in half-hour increments, to mark the office closed.

3. Select **Save** to add unique workday settings to the agency calendar.

Login Security

Login Security defines the method or methods that are used by TRAKiT users to access the application.

- **TRAKiT Login**: Select from the drop-down menu to require the user to enter a TRAKiT Userid and Password.
- **Windows Login**: Select to provide the ability to link the TRAKiT login to the MS Windows user account. Enable the Windows Login feature:
  1. Select **Windows Login** from the **Login Method** drop-down menu.
  2. Select the main **User Preferences** panel.
  3. Select **User Preferences** > **User Names**.
  4. Add and enter the MS Windows user name in the **Windows ID** column now displayed for each TRAKiT user account.
- **Both**: Select to ensure that a user always has access to TRAKiT. If the MS Windows account does not match an existing TRAKiT account, the TRAKiT Login screen is displayed for the user to select an account and provide the password.

Login Options

- **Use TRAKiT Enterprise Only**: The TRAKiT Enterprise interface is the default for all users. This feature should be enabled for all new TRAKiT implementations.
- **Disable Auto-Timeout Mechanism**: This feature disables the TRAKiT user account auto-timeout feature. For more information about setting the auto-timeout for a user, see “User Names.”

Email Configuration

Email settings provide the ability to configure access to an external email client.

The following email protocols are supported:

- SMTP
- Microsoft Outlook

Configure SMTP Protocol:

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

   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. Then, select Use Registered Email Client under Email Options and Save.

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.

Tip: For more information about User Account Settings, see "User Privileges."

APN & Phone

APN & Phone provide the ability to define a data mask for the Assessor's Parcel Number and telephone numbers.

Text Parcel ID (APN) Format

The text parcel ID format provides the ability to apply a mask (format) to unformatted APNs.

To apply a mask:

1. Select the desired format.
2. To see how the mask will affect your data, enter a parcel number in **Test a Sample Entry**.

Tip: Parcel numbers are created using defined groups. By entering the number of digits/characters in the parcel ID components, the speed and efficiency of an APN search is increased.

Phone and Fax No. Format

The phone and fax number format provides the ability to apply a mask (format) to unformatted phone/fax numbers.

To apply a mask:

1. Select the desired format.
2. To see how the mask will affect your data, enter a phone number in **Test a Sample Entry**.

   Tip: A default area code is set by entering the number in **Default Area Code**.

Custom Format

To create a custom format:

1. Select **Custom Format** from either the **Text Parcel ID (APN) Format** or **Phone and Fax No. Format**.
2. Enter a desired format. Numbers are represented by the number symbol (#) and alphanumeric characters are represented by the ampersand (&). Here is an example of a custom format for a phone number: ###.###.####

Printing

Printing provides the ability to set the default output when using the **Print** function and set the number of seconds between print requests.

To view the document or report prior to printing, select **Display**.

To automatically send the document or report to the default printer, select **Print**. To automatically create an email attachment, select **Email**.

To save the document as an electronic file to a selected location, select **File**.

To automatically print the document and attach it to the record, select **Print & Attach**.

Note: Users can override this setting as needed, but the default output format should be set to the format most commonly used.

Grouped Print Queue Entries

This feature inserts a pause when multiple print requests are submitted. This number only needs to be adjusted if there is network printing problem when multiple print requests are submitted. The default time is 3 seconds.

Search

Search provides the ability to define Search/Scan screen labels and whether to include Custom Screen fields as searchable parameters.

- Select **Use Header names in the Search Field drop-down** to customize how standard TRAKiT fields are labeled in the Search/Scan screens.

  Tip: Only System Administrators can change the Search/Scan screen's **System Default** format.

- Select **Include Custom field in Searches for CodeTRAK, PermitTRAK, ProjectTRAK and LandTRAK** to access custom screen fields in the Search/Scan screens.

Reviews

Reviews provides the ability to set standard options for the Plan Reviews panel.

- **Add Review Group Column to Review**: Select to add an additional column to the standard TRAKiT setup which is used to track the number of submissions for a unique review. The Review Group column headings are derived from Module Configuration Review Groups.

  Tip: For more information about configuring Review Groups, see "Grouped Reviews."

- **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.
- **Show Returned Date on Review Entry Screen**: Select to add the **Returned Date** to the **Add Review** cardview screen.
- **Activate Print Queue for Reviews**: Select to enable the Print function in the Reviews panel.
- **Set Date Sent on 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**.
- **Show Username on Review Items** (**default** = **UserID**): Select to display the full name of the user in the Review drop-down list as defined in the User Account.
- **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.

Chronology

Chronology provides the ability to set standard options for the Chronology panel.

- **Time Stamp Chronology Actions on Creation**: Select to automatically insert the User ID along with the Date and Time the Chronology Activity was added to the record.
- **Display Completion Date in Chronology Screen**: Select to add the Completed Date to Chronology.
- **Show Completed Date on 'ACTION' entry screen**: Select to add the Completed Date to the Add Actions screen.

- **Enable notes field in Add chronology action screen**: Select to add the **Notes** field to the **Add Actions** screen.

Notes

Notes provides the ability to set standard options for the Notes screen.

- **Use Standard Notes Form for Entry of Notes in Custom Screens**: Enables the user to enter notes in the Custom Screens using the standard TRAKiT Notes screen.
- **Disable Time Stamp on User Notes—Default Setting**: Disables the date and time stamp when notes are entered using the **Add** function. Only the user ID is appended to the notes.

AutoGen Numbers

AutoGen Numbers provides the ability to create a sequential numbering scheme.

1. Select the **Add** button.
2. Enter a **Name/Description**.
3. (Optional) Enter a prefix.
4. Enter a starting value in **Last Value Used**.
5. Enter the number of digits in **Width**.

   Example: If you enter 4, the maximum number that could be created is 9999.
6. Enter the increment number in **Increment By**.

   Example: If the current number is 50 and increments by 1, the next available autogen number is 51.
7. (Optional) Select **Leading Zero** if you want leading zeros displayed in your autogen number.
   - With leading zeros: 0051
   - Without leading zeros: 51
8. **Save** to apply changes.

   Tip: AutoGen numbers can be used on Custom Screens. For more information, see "Custom Screens."

Contacts

Contacts provides the ability to define the master contact list and enable Direct Lookup.

Enable Direct Lookup in Contacts: Select to provide the ability to automatically search the AEC TRAK module when a name is entered in the **Name** field of any contact *and* the **TAB** key is pressed.

Contact Types

Contact Types provides the ability to define the Master Contact Type List for all TRAKiT modules.

Add a Contact Type

1. Select **Add**.
2. Enter the **Contact Type**.
3. (Optional) Reorder as required.
4. Save changes.

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

Plan Location

Plan Location provides the ability to define and track the physical location of a set of plans associated with a TRAKiT record.

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

Plan Locations

Add a new Plan Location:

1. Select the **Add** button.
2. Enter the name or description of a location.
3. Enter the low number or starting position in the physical file.
4. Enter the high number of the last position in the physical file.
5. **Save** changes.

TRAKiT Screens

TRAKiT Screens contains the system preference related to the TRAKiT interface.

- **Disable mouse wheel on Date fields**: This option disables the interaction between the user's mouse and date fields.

Audit Trail

Audit Trail provides the ability to capture and log system changes.

- **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 to enable the Follow Me feature in Workspace. Follow Me provides the ability to receive notification on a per-record basis when changes occur.
- **Enable Detailed Audit Trail:** Select to provide the ability to create of log changes made to TRAKiT records. The feature will create two new tables in the TRAKiT database:
    - Prmry_AuditTrail—Is the 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 the 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.

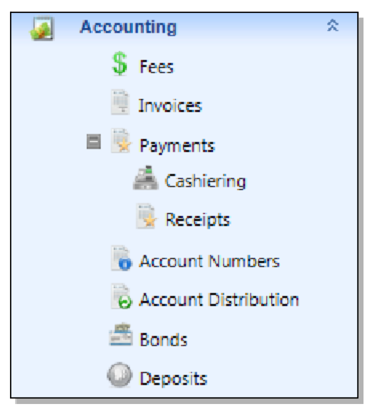
- **Enable User Login Audit Trail:** Select to create a unique table in the TRAKiT database that logs each user's changes. The tables are named **PRMRY_HISTORY_XXXX** (where XXXX is the month and year).

Access to Audit Trail Data

Access to data in the Audit Trail tables is available using custom Crystal Reports or SQL Server Reporting Services (SSRS).

Accounting

Accounting contains preferences that apply to the entire TRAKiT application.



Accounting includes information and configuration for the following:

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

Fees

Fees provide the ability to set the standard options associated with fee assessment and collection.

- 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.

View a Record Audit Trail:

1. Open a TRAKiT record.
2. Expand the **Financial Information** pane.

3. Select **Fee History** on the **Functions** menu.
    - Enable Sort by Fee Order—This option provides the ability to ensure fees are sorted in the financial pane based on the order of the allowable fee schedule.
    - Show Pay Method on Fees Grid—This option adds the method of payment to the Financial Information grid.
    - 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 will be displayed that requires 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.
    - Enable Comments Field—This option adds a **Comments** field to the **Financial Information** pane. This provides users the ability to add short notes to a specific fee item (maximum of 10 characters). The **Comments** field can be enabled for both fee groups and fee items and within each module.
    - Deny Observer Access—This option disables the **Financial Information** pane for users logged in with Observer access.

Invoices

Invoices provide the ability to generate and track 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.

- Enable Invoicing—Enables TRAKiT Invoicing. The following fields are added to the **Financial Information** pane: an invoice flag, number, and date. Also, an invoice payment screen is added to the user's tool bar.
- Enable Check Entry—If enabled, this option provides the user with the ability to receipt a check and disburse the funds manually.
- Number of Days for Invoices to be Overdue—This option defines the number of days after which an invoice is considered overdue.

Payments

Payments contains the options available for cashiering and receipt of payments.

Cashiering

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

Payment Methods

Defines the list of available payment methods (e.g., cash, credit card, check, etc.).

Add a payment method

1. Select **Add**.

2. Enter the payment method description.
3. (Optional) Reorder as required.

Convenience Fees

The credit card convenience fee option provides the ability to charge a fee based on the percentage of the transaction total.

Create a credit card convenience fee

1. Select **Enable Credit Card Convenience Fee**.
2. Select the account number for the convenience fee.
3. Enter the convenience fee percentage.

   Tip: If an account number does not exist for the convenience fee, click **Standard Accounts** to enter a new account number to TRAKiT.

Cash Register Options

The following are system options for the Cash Register feature.

Note: The Cash Register function requires a special multi-item receipt which is not a part of standard implementation. Contact the Support team for a copy of a generic receipt for use with this feature.

Generate a Receipt from Cash Register

1. Copy the multi-item receipt into the \\<app server>\TRAKiT\REPORTS\CUSTOM folder.
2. Create an autogen number.

   Tip: If an autogen number does not exist for the multi-item receipt, click **Autogen Numbers**.
3. Select the autogen number from **Receipt Number Autogen Name**.
4. Select the multi-item receipt name from **Receipt Name**.

The Cash Register Options pane includes the following additional options:

- Mark all Available Records as Selected—This option will automatically select all unpaid fees on any record added to the Cash Register.
- Enable Button to Load Records from eTRAKiT—This option enables the user to import fees assessed in eTRAKiT to the Cash Register.
- Advance Payment Date to Next Business Day (Work Calendar) After—This option provides the ability to specify the time the default payment date will advance to the next business day. To set a specific time, enter the hour, minute and select either **AM** or **PM**.

Financial Pane Options

- Lock Description and Account fields after Fees have been Paid—This option provides the ability to lock both the account number fields and the fee description after the fee has been paid.

Receipts

This feature allows the system administrator to determine how receipt numbers are generated.

- Allow Duplicate Numbers—This preference will allow TRAKiT to generate a receipt number even if that receipt number already exists in the TRAKiT database. This option is used by jurisdictions that do not require a unique receipt number for every transaction.

- Warning Message Only—This preference will warn the user that the receipt number that was entered already exists. This option is typically used by jurisdictions that are manually entering receipt numbers.
- Prevent after [number] tries—This preference allows the system administrator to set the number of attempts that TRAKiT will make in trying to generate a unique receipt number.
- **Do Not Auto—Print Receipt**
- If using a customized receipt, enter the name of the SSRS report name in the **Custom Receipt Name** field.
- Select **Disable Print Receipt Prompt** if a receipt from TRAKiT is not required.
- Select **Print Receipt Without Prompting** to automatically send the receipt to the printer.
- **Receipt Destination** provides the ability to define the default output destination for a receipt (i.e., user-selected, printer, or display).
    1. **User Selected**—Prompts user to select either **Printer** or **Display**.
    2. **Printer**—Automatically sends receipt to the default printer.
    3. **Display**—Automatically send receipt to the display.

Account Numbers

Account Numbers contains the master list of financial account numbers used in all TRAKiT modules.

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.

Account Distribution

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

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.

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

10. To use the distribution, insert the **Account Code** in the **Account Number** field of the fees or subfees.

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 **Bond** pane.

To track bonds, select **Enable Bonds**. For information about creating bond definitions see "Bonds."

Select **Allow Bond Reduction even if Fees are Still Due** to allow the user to reduce a bond when there is an outstanding bond amount on the record.

Select **Limit 'Paid By' to Bond Contacts** if you want the 'Paid By' drop-down list to include only those names found on the Bond Contacts screen.

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

Add a new Bond Contact Type

1. Select **Add**.
2. Enter a unique **Contact Type**.
3. (Optional) Reorder.

Add a Secured By Code

1. Select **Add**.
2. Enter a unique **Secured By** code.
3. (Optional) Reorder.

Deposits

Deposits provides general options for the deposits feature.

To use deposits, select **Enable Deposits**.

- Pay Fees with Deposits Automatically (No Prompt)—This option will automatically pay all unpaid fees directly from available deposits without any user interaction.
- Deposit Threshold Warning—This option allows the system administrator to set a minimum threshold level for deposits. When enabled, a warning is displayed on the record if the deposit balance goes below the established threshold.

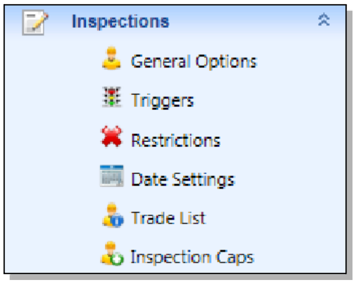
Tip: For more information about Creating Deposits, see "Deposits."

Inspections

Inspections contains preferences that apply to the entire TRAKiT application.

Inspections includes information and configurations for the following functional areas:

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



General Options

- Show City Fields—This option will add the **City** field to the inspection pane.
- Inspection Grid Default Sort Order—Defines the default sort order for the inspections pane.
- Enable Custom Screens for Inspection Types—Enables Custom Screens unique to an inspection type. Click **Enable Custom Screens for Inspections Types**.

  Tip: For more information about how to build a Custom Screen, see "Custom Screens."
- Show User Name on Inspections—The TRAKiT default displays the user ID in the inspector list. Enabling this feature displays the user's name instead of the user ID.

IVR & .WAV Options

The following options support IVR systems:

- Enable Inspector (PIN) usage (IVR)
- Enable Inspection Type Code (IVR)
- Make WAV files.
- Enable VoiceTRAKiT IVR Messaging

Note: Your specific implementation will determine if these options need to be enabled.

Triggers

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

- 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.
- Select **Enable Inspection Completed Date Prompt** to prompt the user prior to setting the completion date. The user is able to either confirm or cancel the setting of the Completed date to the current date.
- Select **Suppress user prompt when a re-inspection fee is added** to automatically insert the re-inspection fee.
- 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.

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 **Prevent users from manually typing an inspector's name** to require users to select a predefined inspector.
- Select **Can't Edit Inspector Name without OVERRIDE_INSPECTOR_LOCK Permission** to restrict the ability to re-assign 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.

Define a List of Inspection Durations

1. Select **Enable Duration**.
2. Select **Add**.
3. Enter the inspection duration.
4. (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.

Work Calendar Settings

Work calendar settings define the parameters for the internal inspections calendar.

Note: This feature is required for Inspection Capping.

Define the Work Dates Calendar

1. Set the number of days prior to the current date and the number of days after the current date. These dates define the range that is available in the calendar. For example, if the current date is February 15, 2011 and you set **# of Days to Show Before Date** to 60 and you set the **# of Days to Show After Date** to 365, the available range of dates is December 17, 2010–February 15, 2012.
2. Set the time for the start and end of the work day.
3. (Optional) Select **Validate Inspection Scheduled and Completed Dates with Work Dates Calendar** to limit users' ability to select only work days. Users will not be able to enter a scheduled or completed date on a non-workday.

Trade List

Trade List supports the functionality of trade-specific inspections.

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 provides the ability to limit the number inspections that can be scheduled each day on a per inspector basis.

Configure Inspection Capping

1. Select **Enable Inspection Capping**.
2. (Optional) Select **Enable Record Based Inspection Capping**. Enabling this preference will count multiple inspections on the same record as one inspection towards the daily cap.
3. Select the inspector(s) that will be capped from **Inspectors Available for Inspection Capping** list and drag them to the **Capped Inspector** list on the right.
4. Assign the capped inspector that you created in step 3 as the default inspector on the inspection(s) you want to cap. For more information about setting a default inspector, see "Create Inspection Types."
5. Ensure that all holidays and non-workdays are set on your agency's calendar.

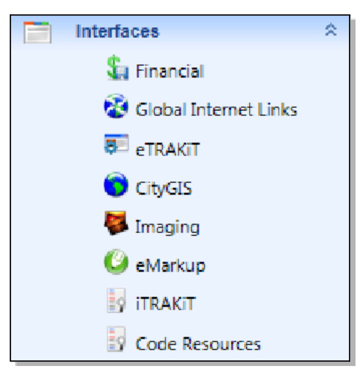
Set the specific daily inspection cap

1. Start TRAKiT.
2. Open either PermitTRAK or ProjectTRAK.
3. Select **Tools** > **Calendar**.
4. On the Tool bar select **Set Inspection Cap**.
5. On the grid, enter the daily inspection cap per inspector.

Create a Cappable 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).

Interfaces



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

These applications include:

- Financial
- Global Internet Links
- eTRAKiT
- CityGIS

- Imaging
- eMarkup
- iTRAKiT
- Code Resources

Financial

Configure the Quadrant Interface

1. Enter the path for the interface files.
2. Select a frequency.
3. Click **Create Initialization file for TRAKiT Monitor**.
4. Payment Plug-In Connection Settings—Defines the payment plug-in settings for a USB credit card reader.

Global Internet Links

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

Create a Link

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

    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 (LandTRAK)
    - {**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**. For more information about parcel number formatting, see “APN & Phone.”
    - {**LOC_RECORDID**}—LOC_RECORDID (all modules). Will return blank if not present.
    - {**RECORD_GROUP**}—Will return group PERMIT, PROJECT, CASE, LICENSE, AEC, PARCEL.

eTRAKiT

- Show eTRAKiT field in Attachments—This feature provides the jurisdiction 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.

  The default behavior for this feature is that attachments are not automatically visible in eTRAKiT.

CityGIS

Enter the URL string for the city GIS system.

Imaging

Enter URL strings for the following document imaging systems:

- Alchemy
- Hummingbird Web Interface
- SIRE

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 WUM.

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 one 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.

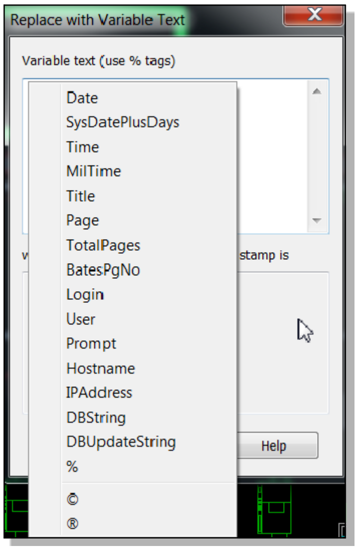
Edit Stamp Templates

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 Var Text) button. Select and enter a percent sign (**%**) to display the list of possible choices for variables.

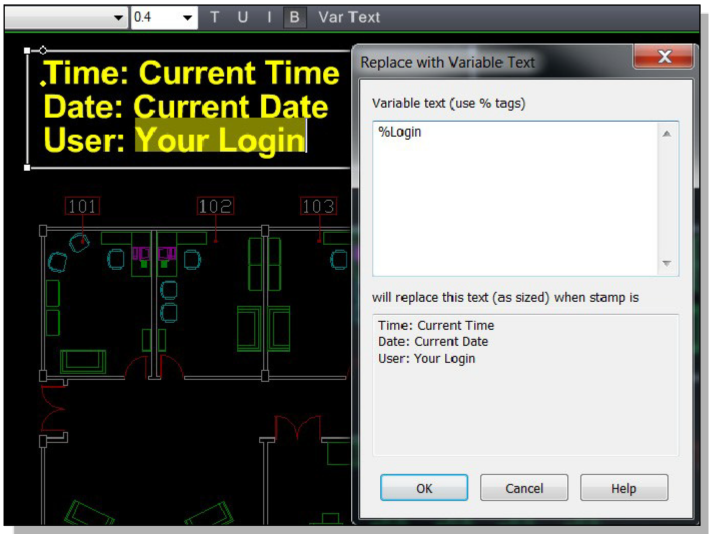


- %**Date**—Inserts the date the print was spooled.
- %**SysDatePlusDays**(x)—Inserts a date the specified number of days past the system date. Replace x with the desired number of days.
- %**Time**—Inserts the time the print was spooled based on a 12-hour clock (AM/PM).
- %**MilTime**—Inserts the time 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—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

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

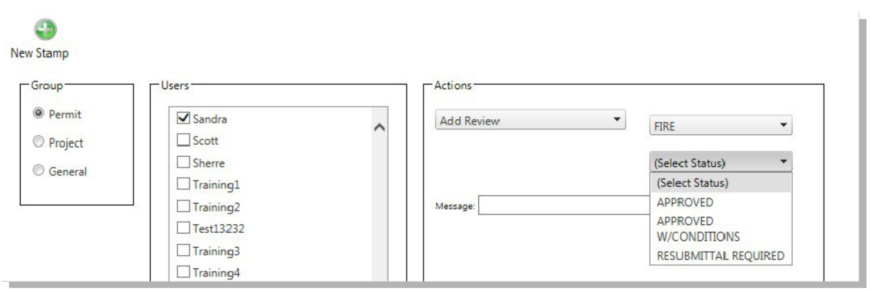


2. Enter the descriptive text for each item. This text is considered the stamp ***preview text***.
3. Use the **Select** tool to highlight the text to be replaced and select the (Var Text) button.
4. Enter **%** to display the list of possible variables and choose the corresponding one to insert. Repeat steps 3–4 for each variable token desired.
5. Select all stamp items and save the group as a stamp template by selecting the **Markup File** icon, **Stamp Templates** and **Save** or **Save As**.
6. 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.
7. To exit the Stamp Template tool, select the **Markup File** icon ( ), **Stamp Templates** and **Close**.

Stamp Automation

Stamp automation is set up in WUM. When enabled, a stamp is associated with a permit or project action and may be activated for specific users only.

1. Select the **eMarkup Stamp Admin** hyperlink to access the automation settings.



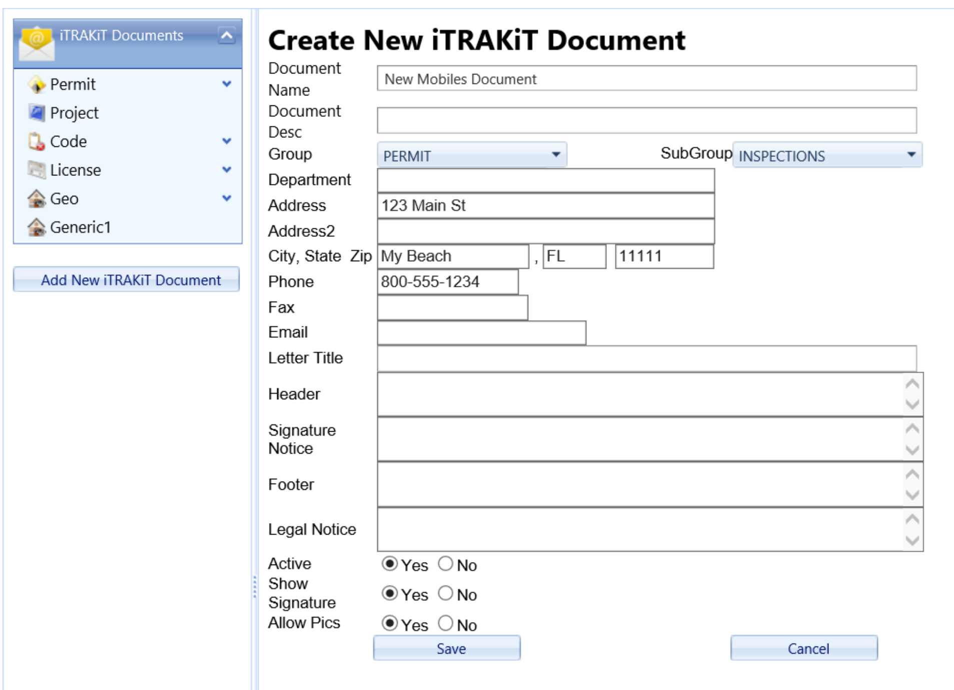
2. Choose the **Group** module to which the stamp will apply: **Permit**, **Project**, or **General** (for global use).
3. Select the **Users** that can have access to the stamp.
4. Under **Actions**, choose the type of action for which to apply the stamp (for example: Add **Review**).
5. Update Review 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.

iTRAKiT

The iTRAKiT document definition provides the ability to create documents printed via the CentralSquare Mobiles applications.

To define a document for use in CentralSquare Mobiles, complete the following steps:

1. Select **Add New iTRAKiT Document**.



2. Enter the document name.
3. Enter the document description.
4. Select the group (module) to which it will apply.
5. Enter the document header information (department name, address, phone/fax, email).
6. Enter the title of the document.
7. Enter the document's header.
8. Enter a signature notice.
9. Enter a footer.

10. Enter a legal notice.
11. Active: Select **Yes** to make this document available in CentralSquare Mobiles.
12. Show Signature: Select **Yes** to enable the user to sign the document on the iPad.
13. Allow Pics: Select **Yes** to enable the attachment of images (maximum of 3) to the letter.
14. Select **Save**. (Below is an example result of printing a document in CentralSquare Mobiles with these settings.)

Tip: The new document might not appear until CentralSquare Mobiles feeds are refreshed in the WUM, usually every hour.

Duplicate/copy an existing document

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 an existing document

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**.

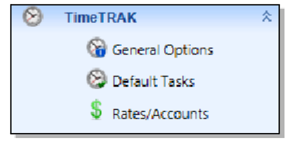
Code Resources

Manage the eCodes user name and password.

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 WUM notification options.

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**.

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 the options to use specific action, inspection, or review type.
2. Select **Create Tasks for all Actions**, **Inspections or Review Types**. This will create a separate entry for each activity.

Rates / Accounts

Set the Rate and Accounts for a User

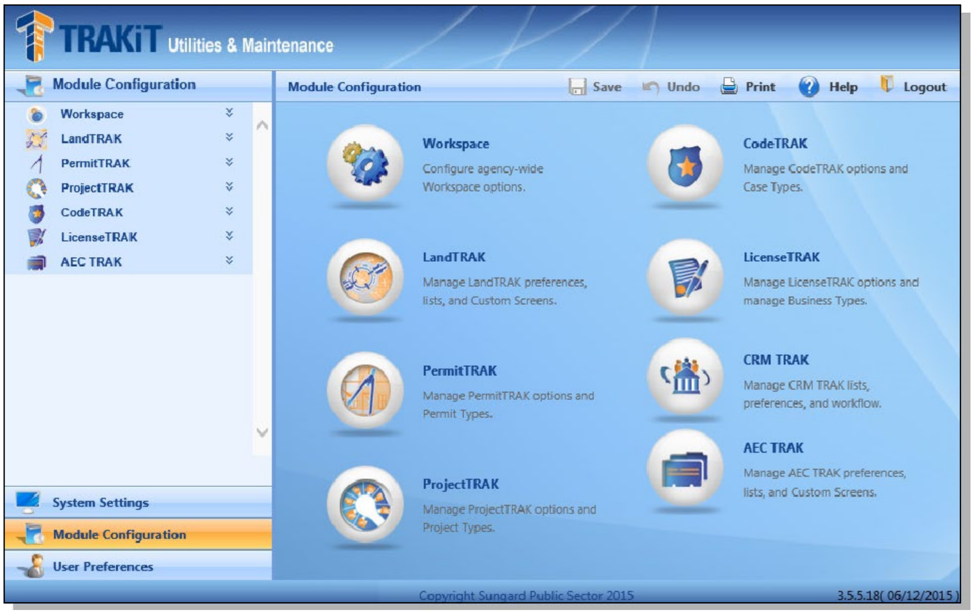
1. Select the user from the drop-down menu.
2. Enter the rate ($/hour) and account number for each activity.
3. Select **Save**.

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

Enable optional Workspace features.

Module Configuration > Workspace Show City Field

Displays the **Site City** field in the **Inspection Center**.

- **Enable Extended Filter**: Adds the ability for the user to filter inspections in the Inspection center by zip code or city name.

LandTRAK

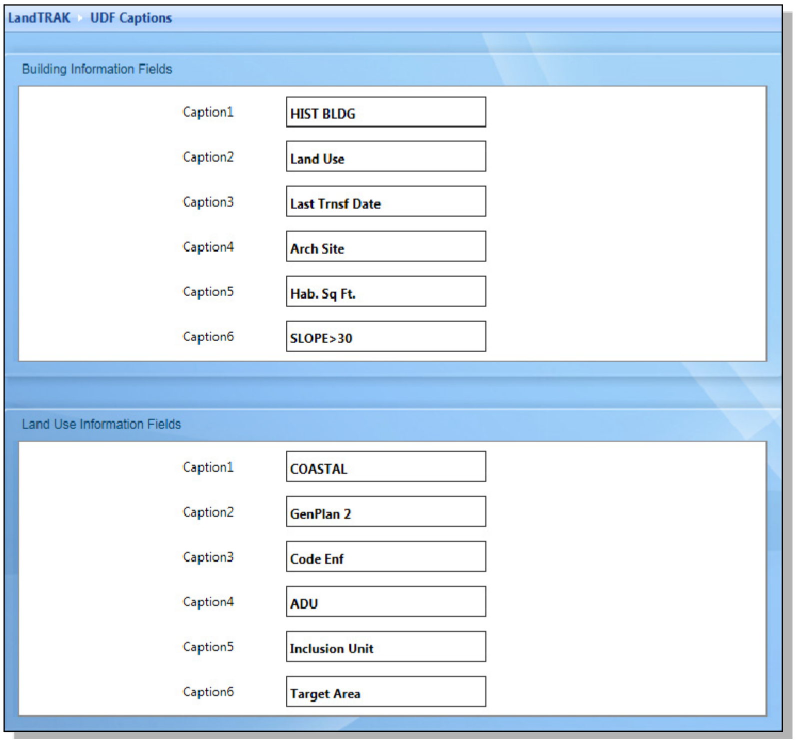
LandTRAK contains the module-specific configurable components and preferences.

Site Info

- Site Address Validation—Requires users to link every newly created record to a LandTRAK record. Prevents users from entering Site Information directly onto the record.
- Site Address Labels—Provides the ability to customize the labels attached to the data fields in the Site Address section of LandTRAK. Enter unique labels on an as needed basis. The reset button will return the fields to their original titles.

UDF Captions

Provides the ability to rename six captions in the Building and Land Use pane. 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 Geo Types that are used in LandTRAK type list.

Add a New Geo Type

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

Status List

Define the LandTRAK 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 LandTRAK 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 LandTRAK record using the status field. For additional information about maintaining the LandTRAK status list, see “Status List.”
- **Lock Parcel when Permit, Project, Case, or License Status has Parcel-Lock flag on**: see “LandTRAK Record Lock.”
- **Use AutoGen Number for New Parcels**: Used to identify the autonumber generator for temporary LandTRAK records. **Important:** The prefix for the autogenerated number used for temporary LandTRAK records **MUST** begin with the letter **T**. CentralSquare recommends using the prefix **TEMP**. For additional information about configuring an autogenerated number, see “Autogen Numbers.”
- **Prevent LandTRAK from creating a new Geo record with same ParcelID as an existing record**: Enforces the requirement that all LandTRAK record numbers are unique.
- **Use Multiple Restrictions**: Enables the multirestrictions feature. If this feature is disabled, the system will maintain restriction notes in a single field. CentralSquare recommends enabling this feature for all clients.
- **Disable Attachments DELETE**: Disables all user’s 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 MS Windows Word documents (.DOC) to read-only when attached to a record.
- **Hide Maintenance Log** Removes the Maintenance Log pane from the user interface.
- **Use Site Change Log** This preference enables the automatic logging of changes made to a LandTRAK record. Changes made to the LandTRAK record are displayed in the **Site Change Log** pane.
- **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 LandTRAK 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.

LandTRAK Subscreen Indicators

Provides the ability to define whether a record indicator is displayed on the panes. An indicator can be either an asterisk (*) or a number. If number is selected, the number indicates the total number of records in the pane.

Contact Options

- **Disable Last Name and First Name (Use only FULL name field)**: Enabling this preference combines the owner last and first names into a single name field.
- **Use Multiple Contacts**: Enables the Contacts pane in LandTRAK. CentralSquare recommends enabling this feature for all clients.

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. For more information about creating a department, see "Departments."
2. Associate each user with a department. For more information about associating 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 associating 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 associating a prefix with a department, see "Add 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 Name > Prefixes. 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.

Add 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 create, 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 LandTRAK 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)

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

Record Types

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

Create a new 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 “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) Enter a Description for the record.
11. (Optional) Reorder the type list as required. CRM TRAK only: To set a type as the default, move it to the first position and click Save.
12. (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.”
13. (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

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, printed documents, 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 (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 and drop 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 LandTRAK will not be copied to the record.
5. (PermitTRAK > Type > Status) **Prevent eTRAKiT Payment**—Provides the ability to define which status allow 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 and drop 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 and drop 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 and drop 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.

Printed Documents

The print feature provides the ability to define a specific list of reports or documents by record type.

Create a list of Available Documents or Reports for a Specific Record Type

1. Expand the record's configurable components list.
2. Expand the record type.
3. Click **Printed Documents**.
4. Click **Add**.
5. Enter a description that the user will see for the document or report.
6. Select the document or report from **File Name**. These files are stored in \\<app server>\TRAKiT\Documents. (Optional) Reorder as required.

Auto Email by Status

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

Configure TRAKiT to Automatically Generate Emails based on the Record Status

1. Configure TRAKiT's email feature (for more information, see "Email"), if needed.
2. Create the email template(s).
   a. Open Windows Notepad.
   b. Enter the subject & body.

Example:

SUBJECT: Permit is ready for Pickup.

BODY: This is to inform you that Permit Number [PERMIT_NO], applied for on [APPLIED], by [APPLICANT_NAME] is ready for pickup during normal business hours.

The body of the email template can dynamically insert any field from the records primary table (e.g., Permit_Main, Project_Main, Case_Main etc.) for the module by specifying the field name within square brackets (e.g., [PERMIT_NO]).

   c. Save the file (e.g., ISSUED_EMAIL.txt) to the following folder on your application server \\<YourAppServer>\TRAKiT\DOCUMENTS\EMAIL.

3. In WUM, expand the record's configurable components list.
4. Expand the record type.

5. Click Auto Email by Status.
6. Click Add.
7. Select the Status that triggers the email.
8. Select the Email Template.
9. Enter either a contact type in brackets or an email address (e.g., [applicant];user@trakit.com). Multiple email address are separated by a semicolon.

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 “Create a CRM TRAK Email Template.”
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.

System Preferences by Record Type (PermitTRAK only)

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

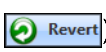
Enable or disable a system preference:

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 apply 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 tool bar.
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. For more information about creating departments, see “Departments.”

Master Subtypes List

Add an item to the Master Subtypes list:

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

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 LandTRAK record. For additional information about configuring record lock see “LandTRAK 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.

Delete an item from the Master Status list click Delete.

Master Categories List (CRM TRAK only)

Add an item to the Master Categories list:

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

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

Add an item to the Master Status list:

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

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.

Delete an item from the Master Chronology list click Delete.

Chronology System Preference

Permit Activities History Report—Defines the report that is generated from the Chronology Pane print queue.

LandTRAK Record Lock

The LandTRAK record lock provides the ability for the user 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 LandTRAK record.

Enable this feature:

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

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

Tip: Clicking on the Locked indicator in LandTRAK will display the record number(s) and the user that applied the status lock.

Custom Screens

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

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

There are two steps in creating Custom Screens:

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

Adding Data Fields

Create a new data field**:**

1. Click Data Fields under Custom Screens.
2. Click Add.
3. 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 (: - ; , / & ! = ? + 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)
4. Select the field type (i.e., TEXT, DATE, INTEGER, FLOAT, MEMO, BOOLEAN)
    - TEXT: Consists of alphanumeric data along with special characters. Maximum 8000 characters.
    - DATE: Allows users to select a date from the calendar on the Custom Screen. Date and time data from January 1, 1753, through December 31, 9999, 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: A unique field type developed for use in TRAKiT. MEMO should be used when the TEXT field exceeds the 8000 character maximum or the user would prefer the data to be displayed in a notes or memo window instead of a text box. MEMO stores data that exceeds 2000 characters in length in the MEMOS table (e.g., Permit_Memos, Project_Memos, Case_Memos, etc.).
    - BOOLEAN: Creates a check box on the custom screen. 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.
5. For text fields, set the Size to the desired field length (the default for text fields is 10 characters).

    Tip: If you delete a Custom Screen field, it WILL also delete the associated data.

Designing the Screen

Add a new screen**:**

1. Click Add Custom Screen or New.
2. Select the appropriate Custom Screen Type. TRAKiT provides the ability to create a custom screen with either 10 or 12 fields.

Note: There is a maximum of eight (9) 10 Field Layout screens and eight (9) 12 Field Layout screens per record type. This means that any one TRAKiT record type has a maximum of 18 custom screens.

3. Enter a title that the user will see on a tab in the Custom Screens pane in **Screen Label**.
4. For each data field on the screen:
    - Enter a caption.
    - 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 the green arrows to arrange/rearrange the order of the fields.
5. Select from the following options as required:
    - Select **Read Only** for data that is for information only.
    - Click **Options** to create a pick list or Autogen number.

Create a Pick List**:**

1. Click **Options** next to the field.
2. Click **Pick List**.
3. Click **Add** in the Pick List window and enter the pick list item. Repeat as needed and click **OK**.
4. (Optional) Reorder the list.

Create an Autogen (autogenerated) Number**:**

1. Create your autogenerated number in System Settings. For more information about creating autogenerated numbers, see “Autogen Numbers.”
2. Click **Options** next to the field.
3. Click **Autogen** and select the title of the autogen number created in step 1 from the list and click **OK**.

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

Tip: Deleting a Custom Screen will only remove the screen. Deleting a Custom Screen DOES NOT delete the associated field or the associated data.

Tip: There is a system setting that allows users to include the custom fields in the module (Permit, Project, Code and LandTRAK) Search/Scan screen. The setting is located at System Settings > Search > Include Custom field in Searches for CodeTRAK, LandTRAK, PermitTRAK, and ProjectTRAK (see “Search configuration”).

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.
7. For additional units of measure, see “Fee Preferences.”
8. (Optional) If the valuation is a subvaluation, select the valuation category from the **Sub-Valuation of** drop-down list.
9. Associate the new valuation(s) with specific permit type(s), as applicable.

Create 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 Option

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.

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:

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

Fee Schedule

The Fee Schedule feature allows jurisdictions to enter multiple changes to a fee schedule and assign an effective date that the changes are available in TRAKiT.

Create a new Fee Schedule

1. Open Module Configuration > Module > Fees > Fees List.

2. Click Add next to Schedule Name.
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 creates a new fee schedule for all TRAKiT modules. TRAKiT can have only one active fee schedule. Only one nontest 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 Client

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

Creating 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:
  1. **BLDGSF**—Permit_Main.BLDG_SF; no standard entry in PermitTRAK, but can be included on Custom Screens
  2. **BLDG2SF**—Permit_Main.BLDG2_SF; no standard entry in PermitTRAK, but can be included on Custom Screens
  3. **JOBVALUE**—Permit_Main.JOBVALUE; calculated on the Valuation Details screen
  4. **UNITS**—Permit_Main.NO_UNITS; no standard entry in PermitTRAK, but may be included on Custom Screens if desired
  5. **GARSF**—Permit_Main.GAR_SF; no standard entry in PermitTRAK, but may be included on Custom Screens if desired
  6. **GAR2SF**—Permit_Main.GAR2_SF; no standard entry in PermitTRAK, but may be included on Custom Screens if desired
  7. **BLDGS**—Permit_Main.NO_BLDGS; no standard entry in PermitTRAK, but may be included on Custom Screens if desired

Note: For more information about creating 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:***MinimumFee***]**—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 are 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**

Description	Fee Formula
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)***
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): 1. BLDG_SF 2. BLDG2_SF 3. GAR_SF 4. GAR2_SF 5. NO_BLDGS	***JOBVALUE * .05***

Description	Fee Formula
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)***
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***

Creating Fee Definitions

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

Create 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

1. Open Module Configuration > Module > Lookup Tables.
2. Select the Table Name to edit or click Add to create a new Lookup Table.
3. Enter or edit the table's description (this is for internal use only).
4. 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).
5. 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
$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 Document Name (PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**—Defines the document that is used to generate a receipt. These documents are stored in \\<app server>\TRAKiT\Document.
    - **Receipt Numbers AutoGen Name (PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LicenseTRAK)**—Defines the AutoGen number used on the receipt. For more information about how to create or manage AutoGen numbers, see “Autogen Numbers.” 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):

1. 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 creating valuations, see “Create a Valuation.”
2. 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.

- Enable Comments field in Fees (PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, AEC TRAK)—Adds a comments column to Fee item in the Financial pane (limited to 10 characters).
- Enable Comments field in Sub-Fees (PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, AEC TRAK)—Adds a comments column to the Sub-Fee item in the Financial pane (limited to 10 characters).
- **Set Type Specific Receipt Numbers (PermitTRAK, ProjectTRAK, CodeTRAK)**—Provides the capability to generate receipt number for a specific type permit.

1. Click Set Type Specific Receipt Number.
2. Click **Add** and select **Type Name**.
3. Select **AutoGen Name**. See “Autogen Numbers” for additional information.
4. Click **Save**.

- **Pro-Rate/Penalty % (LicenseTRAK)**—Used to define the percentages applied to LicenseTRAK fee that is defined as prorated amount or a penalty.

Add a new Percentage

1. Click **Add**.
2. Enter the percentage.

Deposits

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

Creating Deposit Definitions

Tip: It is recommended that your standard account numbers are set up before deposits are created.

Create 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**.

Tip: 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 “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

Create Bond Definitions

Create 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**.

    Tip: 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 Deposits 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.

Setup reviews using the following procedures:

- Create Review Types
- Edit Review Types
- Delete Review Types
- Group Review Types
- Define the List of Reviewers
- Define the List Review Status Codes
- Create Standard Notes

Creating Review Types

Create a Review Type in your System Setup

1. Open Module Configuration > Module > Reviews > Reviews List
2. Click Add.
3. Enter a Review Name (Maximum of 20 characters).
4. (Optional) Enter a Review Description (Maximum of 60 characters).
5. (Optional) Select a Default Reviewer.
6. (Optional) Select a Required Previous Review. Users cannot schedule the review until the required review is passed.
7. (Optional) Enter the number of days after the review is created that the review is due in the Default Due Date aging from 'Sent Date' field. If a value is specified, 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. To base the returned date on the TRAKiT Workdates Calendar, see "APN & Phone."
8. (Optional) Exclude from Approval Trigger—Depending on your system preferences, TRAKiT may automatically set a record's status to **Approved** when all reviews are set to a certain status. To exclude this review from the record approval, select the check box. 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."

(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 wish to edit or edit the review properties directly in 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 newly created record, remove the review from each record type in your record's configurable components.

Grouped Reviews

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

Create a new 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 click Save. Edit a Review Group Title
4. Open Module Configuration > Module > Reviews > Grouped Reviews.
5. Select the Group.
6. Click Edit and enter the new review group name.
7. Click Save.

Delete a Review Group

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

Add 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.

Delete 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. For more information about adding the Review Group column to the reviews pane, see Add Review Group Column to Review under "APN & Phone." 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.

Tip: To automatically set the returned date when any status is set, see “APN & Phone.”

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.

Create 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.

Create a Standard Note(s) 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.
- **Send an automatic email to Default Reviewer when a review is added (PermitTRAK and ProjectTRAK)**: A TRAKiT generated email is automatically sent to the default reviewer when a review is first added to the record.

  Note: Changing the assigned reviewer **does not** generate an email to the new reviewer.
- Enable email messagebox when sending auto review emails (PermitTRAK and ProjectTRAK): TRAKiT generated emails are displayed to user for editing.
- **Review History Report (F5) (PermitTRAK and ProjectTRAK):** Defines the report that is generated from the review pane.

  Note: Report is stored in \\<app server>\TRAKiT\Reports.
- **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.
- **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 the status of each unique review on the record is to 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.

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.

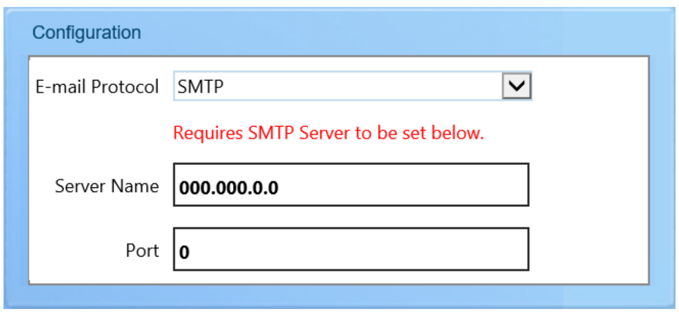
Enable the Print Queue and Define the List of Available Documents

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

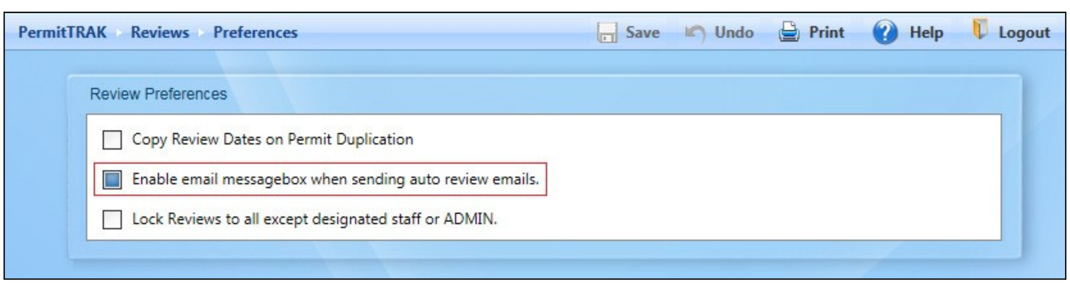
This feature automatically generates email from optional custom templates both by Module and Review Type. When enabled, each review type generates an email to the assigned reviewer when a review is added.

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

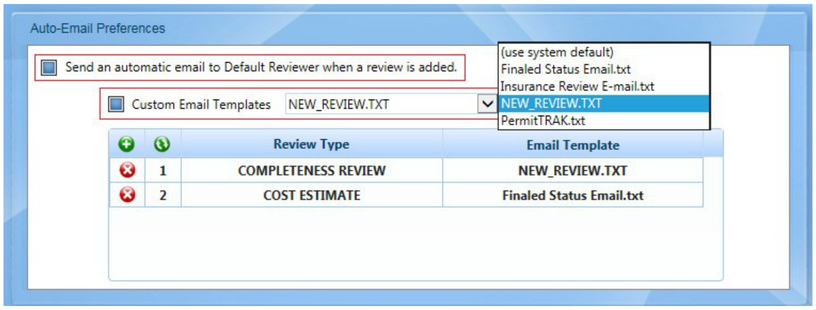


Module Configuration > PermitTRAK / ProjectTRAK / LicenseTRAK > Reviews > Preferences

1. Expand the Configurable Components Record List, expand **Reviews**, and 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 Default Reviewer when a Review is Added**. This will send a default email to the Reviewer. This email cannot be edited.



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.

Auto Email Template Creation

In Windows Notepad, create a text file (.txt) template that includes Subject and Body elements and then save (*filename example:* `Planning_Review.txt`) 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

Template 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]**.

As shown in the above example, fields can be dynamically inserted into the body of the email template. Available choices for fields are shown in the following examples:

Primary Tables**:** Permit_Main**,** Project_Main**,** License_Main

Primary table field names are referenced by inclusion in square brackets, e.g.: **[PERMIT_NO]**.

Module Review Tables**:** Permit_Reviews**,** Project_Reviews**,** License_Reviews

Module review field names are referenced by inclusion in square brackets and an exclamation point at the beginning, e.g.: **[!ReviewType]**.

Trades

The trades feature provides the jurisdiction with the ability 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. For more information about defining Trade titles, see "Trade List."
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 associating 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. For more information about defining Trade titles, see “Trade List.”
2. Associate an inspector with a trade. For more information about associating an inspector with a trade, see “Define Trade Specific Inspectors.”
3. Associate a result code set with a trade. For more information about associating an inspector with a result code set, see “Define Trade-Specific Results.”

Inspections

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

Set up inspections using the following procedures:

- Create Inspection Types
- Edit Inspection Types
- Delete Inspection Types
- Create Custom Screens for Inspection Types
- Group Inspection Types
- Define Inspector List for Inspections
- Define Automatic Reinspection Fees
- Create Standard Notes for Inspectors
- Create Standard Remarks for Inspections

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. For more information about defining the Trade list, see “Trade List.”

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

1. Select the result codes 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 creating a prefix, see “Add 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.”

Define the Inspector List

Define the inspector drop-down 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 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."

   Tip: You can set an Inspections System Preference to assess the re-inspection fee without prompting the user to confirm the fee. For more information about setting this preference, see "Reinspection Fee (Graduated Schedule)."
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 Note(s) 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.

Inspection Preferences

Inspection Preferences are the systems preferences/features that are available for the inspections feature.

Set an Inspection Preference for a Module

1. Open Module Configuration > Module > Inspections > Preferences > Preferences.
2. Enable one or more preferences by either selecting the box or item from the drop-down menu.

Inspection Preferences

The following is an explanation of the Inspection Preferences:

- **Show eTRAKiT inspection request types in Permits Type Definitions (PermitTRAK)**: Adds eTRAKiT inspections as a configurable component in PermitTRAK type definitions. For more information, see "Configurable Components."
- **Permits Inspections Posting Report (PermitTRAK)**: Defines the report that is generated when inspections are posted using the batch scheduling feature.
- **Inspection Time Increments (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: Defines how time increments are displayed to the user. Select **Military Time** if required (e.g., 1500 vs. 3:00 p.m.).

Inspection Triggers

Module Configuration **>** Module **>** Inspections **>** Preferences **>** Triggers

- **Set Default Inspector by Type of Inspection (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: The default inspector based on the inspection type. For more information about assigning 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 (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: The default inspector is based on the inspector assigned to a specific LandTRAK record.

- **Insp Type Overrides Geo (PermitTRAK)**: If a default inspector is assigned to both the Inspection type and a LandTRAK record. The Inspector assigned to the type will take precedence over the inspector assigned to the LandTRAK record.
- **Set Default Inspector when new record is created (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: When a new record is created, the user is presented with a list of inspectors from which to select the default inspector for all inspections associated with the record.
- **Set on first inspection (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: User is prompted to select the default inspector when the first inspection is added to the record.
- **Use Default Inspector2 when Permit Prefix is (PermitTRAK)**: 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.
- **Set Permit Final date when Inspection Type Contains ** (double asterisk) and when Result is (PermitTRAK)**: 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).

Reinspection Fee (Graduated Schedule)

This option provides the ability to use a graduated fee schedule for assessing reinspection fees.

Configure a Graduated Reinspection Fee Schedule

1. Select Use Reinspection Schedule.
2. Select a result code to trigger the reinspection fee schedule.
3. Enter the re-inspection fee Account Number
4. Select either:
    - **User Inspection Date and Type as Fees Description** if you want the inspection title and date included in the reinspection fee description

      or
    - **Manual Type Fee Description** and enter a description.
5. Click **Add** in the graduated re-inspection fee schedule.
6. Enter the **Failure #**.
7. Enter the re-inspection fee amount for failure.
8. Repeat steps 5–7, if needed.

Note: Failures that exceed the graduated reinspection fee schedule will not be assessed a reinspection fee.

Inspection Restrictions

Module Configuration **>** Module **>** Inspections **>** Preferences **>** Restrictions

- **Lock Inspection when COMPLETED (Except Admin) (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: Locks the inspection record when the completed date is entered. Does not apply to System Administrators.
- **Designated Inspector OK (LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK)**: Locks the inspection record for all users except the assigned inspector when a completed date is entered.

Enable Per-Record Inspection Sequencing

TRAKiT provides the ability to define a per permit inspection sequence. A user will not be able to schedule an inspection until all prerequisite inspections have been cleared.

Enable Inspection Sequencing

1. Select **Enable per record inspection sequencing**. Enabling this feature adds an additional column to the Inspections pane and the Inspections Center (Workspace) labeled with a pound sign (#).
2. Number each inspection. An inspection numbered zero (0) is exempt from sequencing. This feature precludes the user from scheduling an inspection until an inspection with a lower sequence number has been cleared.
3. Select one or more inspection result codes that satisfies the sequencing requirement from **Inspection Result Codes that Satisfy Prerequisites/Sequencing**.

   Note: This feature overrides the inspection's REQUIRED PREVIOUS INSPECTION setting. For more information about this setting, see "Create Inspection Types."

   - **Allow Inspections Scheduling based on Permit Status (PermitTRAK)**: When enabled, defines the required permit status to set the inspection scheduled date.

   Note: This does not preclude an inspection being added to the record. It just precludes the schedule date from being set.

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 (CodeTRAK): Automatically sets the Follow-Up date to the most recent inspection Scheduled Date.
- Set Last Action Date to Most Recent Inspection Scheduled (CodeTRAK): Automatically sets the Last Action date to the most recent inspection Scheduled Date.

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.

Creating Events and Activities

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 > (PermitTRAK, ProjectTRAK or LicenseTRAK) > Conditions > Conditions List.
2. Click Allow Multiple Conditions.

Create a new condition

1. Open Module Configuration > (PermitTRAK, ProjectTRAK or LicenseTRAK) > 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 defining this list.
6. (Optional) Create a Custom Screen. For more information about custom screens, see “Custom Screens.”
7. (Optional) Reorder as required.

Departments

Create a new Department

1. Open Module Configuration > (PermitTRAK or ProjectTRAK) > 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 > (PermitTRAK or ProjectTRAK) > 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 > (PermitTRAK or ProjectTRAK) > 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.

Module System Preferences

This chapter defines the module-specific system preferences.

PermitTRAK

Enable or Disable a System Preference

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

Preferences

The following are PermitTRAK System Preferences that 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 only)."

Preferences

Main Permit Screen—Site Information Options

The following preferences apply to the Site Information of the Permit Information pane:

- **Show City Name with Site Address**: When enabled, displays the City name in the Site Information area.
- **Show Parcel Number on Main Screen**: When enabled, displays the Assessor Parcel Number in the Site Information area. The Assessor Parcel number when displayed also enables the user to open the LandTRAK record by clicking on the number.
- **Set Restriction Flag Color**: Defines the color of the word Restriction when displayed in the permit information pane.
- **Delete Permit**: Deletes the specified permit record.

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.
- **Generate Permit PINs (NOTE: Must run RecordID generator to create PINs)**: This feature generates a unique identification number for each PermitTRAK record. This PIN is stored in Permit_Main, PIN (integer).

1. Open Module Configuration > PermitTRAK > Preferences > Preferences.
2. Select Generate Permit PINs

   Note: You must run RecordID generator to create PINs.
3. System Administrator must run the database structure check. For more information about running a database structure check, see "Database Structure Check."

- **Set Word (.DOC) to Read-Only**: Automatically sets the attribute flag for Microsoft Word documents (.DOC) to read-only when attached to a record.

- **Disable Attachments DELETE**: Disables all users' ability to delete attachments (this feature overrides the users' 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.
- **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

- **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))

Contractor Records

- **Check all records in AEC Insurance for each Contractor**: Alerts the user to any AEC TRAK record with an expired insurance entry.

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 (PermitTRAK).”
- **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

- **Require PERMIT Attachment to a PROJECT**: Presents a warning message if a permit is not created (attached) from an existing project record. Answering yes displays the ProjectTRAK Search/Scan Screen. Answering no allows to user to continue on to the permit record. The warning message will continue to be displayed until the permit is linked to a project.
- **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 user's 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

Enable or Disable a System Preference

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

Preferences

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

- **Delete Project**: Deletes the specified project record.
- **Show City Name with Site Address**: When enabled, displays the City name in the Site Information area.
- **Show Parcel Number on Main Screen**: When enabled, displays the Assessor Parcel Number in the Site Information area. The Assessor Parcel number when displayed also enables the user to open the LandTRAK record by clicking on the number.
- **Set Restriction Flag Color**: Defines the color of the word Restriction when displayed in the project information pane.
- **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.
- **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.

- **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))
- **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 My Projects widget in Workspace uses the Closed date to define which records are displayed.

Warning: Changing the Closed label might cause the My Projects to incorrectly display 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.

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 user's ability to create a subproject when the record lock is set.
- **Prevent Creating Sub-Permits When Locked**: Disables the user's ability to create a subpermit when the record lock is set.
- **Prevent Linking Cases to CLOSED Projects**: Disables the user's 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 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.
- **Disable Attachments DELETE**: Disables all users' ability to delete attachments (this feature overrides the users' privileges). Does not apply to System Administrators.
- **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.

CodeTRAK

Enable or Disable a System Preference

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

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**.
- **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.

Triggers

- **Show City Name with Site Address**: When enabled, displays the City name in the Site Information area.
- **Show Parcel Number on Main Screen**: When enabled, displays the Assessor Parcel Number in the Site Information area. The Assessor Parcel number when displayed also enables the user to open the LandTRAK record by clicking on the number.
- **Show Restrictions Flag on CodeTRAK Main Screen with Color**: Provides the ability to enable or disable and set the color of the restrictions flag on the Case Information pane.
- **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 LandTRAK record or an individual from the drop-down list. Select GEO Based to assign the officer based on the LandTRAK record.
- **Default Status for New Cases**: Defines the initial status when the record is created.
- **Email Notify Officer when New Case is Created from LandTRAK**: 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.
- **Disable Violations**: Disables and removes the violations pane from the user interface.
- **Disable Chronology**: Disables and removes the chronology pane from the user interface.

Allow Multiple Violations per Case

The default behavior for CodeTRAK provides the ability to associate a single violation per case record. This feature allows the jurisdiction to create case records with one or more associated violations.

Enable the Multiple Violations Feature

1. Enable the Allow Multiple Violations per Case preference.
2. Click Configure Types.

Creating Standard Violation Notes for Officers

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

Create a Standard Note(s) for Inspectors

1. Select an Officer's name or All Inspectors.
2. Click **Add**.
3. Enter the comment/note in the **Standard Note** field.
4. Select whether this Standard note is available for all inspection types or one specific violation type.
5. (Optional) Reorder as required.

Delete a Standard Note

1. Select an Officer's name or All Officers.
2. Click **Delete** next to the Standard Note.

Copy a Standard Note to One or More Officers

1. Select an Officer's name.
2. Select the note to copy.
3. Click **Copy Notes to Another User**.
4. Select one or more Officers.
5. Click **Save**.

- **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 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.
- **Disable Attachments DELETE**: Disables all users' ability to delete attachments (this feature overrides the users' privileges). Does not apply to System Administrators.
- **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.
- **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))

- **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

Enable or Disable a System Preference

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

Triggers

- **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, 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.
- **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.”
- **Record Sub-Screens Indicators**: Defines how panes with multiple items display the total number. Options:
  - No indicator (e.g., Contacts)
  - Asterisk indicator (e.g., Contacts*)
  - Record Count Indicators (e.g., Contacts (4))

Restrictions

- **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.
- **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.
- **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

Enable or Disable a System Preference

1. Open Module Configuration > CRM TRAK > Preferences.
2. Select 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.
- **On Issue Completion**, **Issues are Locked**: The record is locked when the status that is marked as This Status Marks the Issue as Completed is selected.

AEC TRAK

Enable or Disable a System Preference

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

Autogen Options

- **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.

  Tip: For more information about creating or managing AutoGen numbers see "AutoGen Numbers."
- **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.

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 (Workers Compensation 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 (Workers Compensation 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 (Workers Compensation 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 users' 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). For more information how to configure Autogen numbers see "Autogen Numbers."

- **Default Status for New AEC Record**: Defines the default status when an 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. For more information about configuring global internet links, see "Global Internet 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 **Internet Links** in CodeTRAK on the Notes screens.
    - Imaging Links—Accessible through **Imaging Links** feature.
3. Enter a title or description for the link.
4. Enter the URL.
5. (Optional) Select Browser if you want the link to open in a separate browser window.

Tip: There are special tags that can be used in URLs that will allow TRAKiT to pass data to the web—site. 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 (LandTRAK)

{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. For more information about parcel number formatting, see "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}

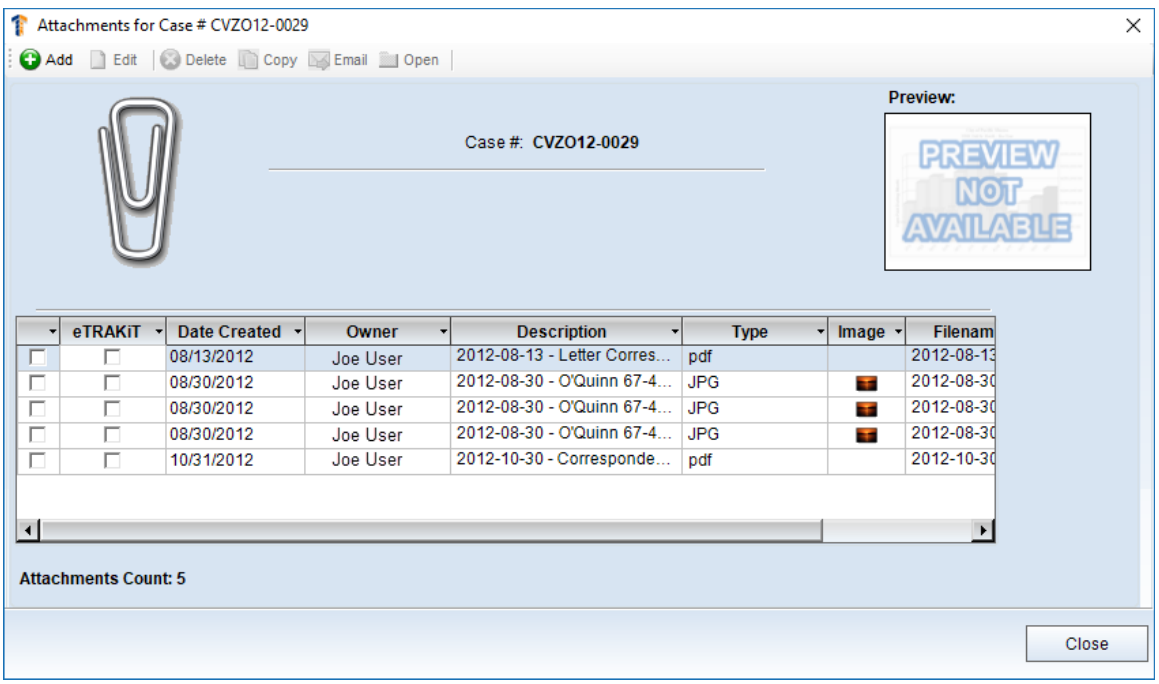
AEC TRAK—{ST_LIC_NO}, {AECTYPE}

LandTRAK—{GEOTYPE}

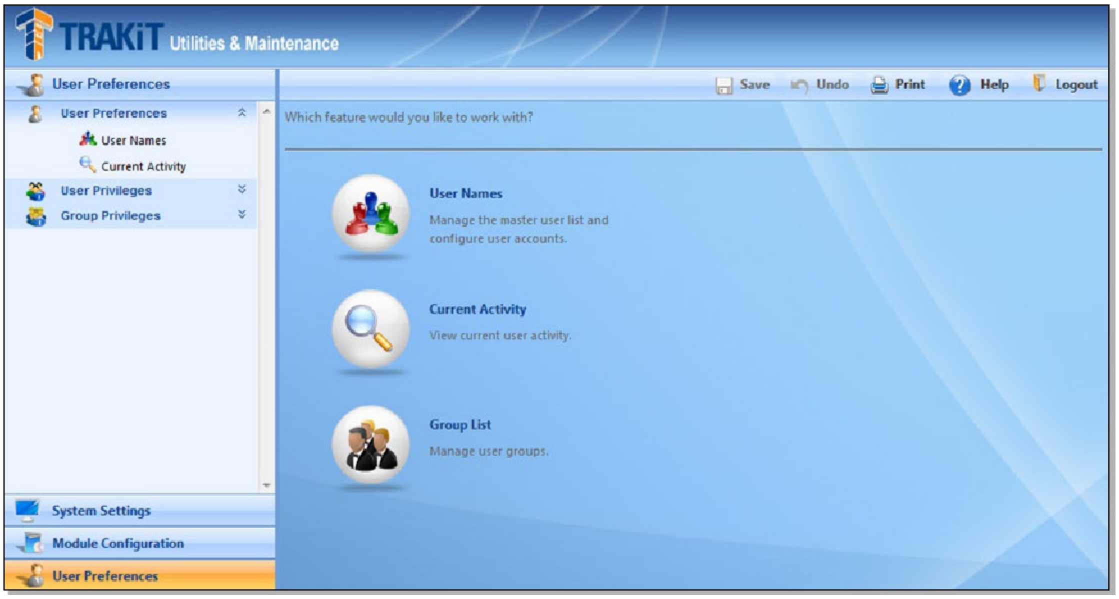
Attachments

Version Number

When logged in as a System Administrator, the Attachments screen displays a **Version** column. This column displays the number of times a file of the same name has been attached to the record.



User Preferences



User Preferences provide the ability to create and control access to TRAKiT and its functions.

User Preferences

User Names

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

Create a new TRAKiT Account

1. Click **Add**.
2. Enter the **User Name** (maximum 30 characters).
3. Enter a **User ID** (user IDs must be unique and a maximum of 6 characters).
4. Enter a **Password** (maximum 30 characters). 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 into TRAKiT and enter their 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, and officer). If an account is subsequently set to active the user will have to be reassociated with previously held TRAKiT roles (i.e., inspector, reviewer, project manager, and 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 on users. The list can be filtered by department or currently logged on 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 Display Users Currently Logged On.
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 users session by clicking Force Out**.**

User Privileges

User privileges provides the ability to assign access to modules or functions.

Tip: A user account (User Preferences > User Names) must be created before assigning 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. That means that if the group definition changes it does not automatically change the privileges assigned to a user.
3. Select any applicable roles (i.e., inspector, reviewer, officer etc.).

Module	Privilege Title	Description
AEC TRAK	AEC_DENY_FINANCIAL_PANE	Denies access to Financial Pane
AEC TRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
AEC TRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
AEC TRAK	CAN EDIT AEC RECORD	
AEC TRAK	CAN PAY FEE	

Module	Privilege Title	Description
AEC TRAK	CAN UNPAY FEE	
AEC TRAK	CAN_DISABLE_NOTES_DATESTAMP	
AEC TRAK	CAN_EDIT_CHRONOLOGY_NOTES	
AEC TRAK	DENY ACCESS	
AEC TRAK	DENY APPLY CREDIT	
AEC TRAK	DENY_HOLD_NOTES	This Access Right will prevent the User from viewing HOLD NOTES.
AEC TRAK	DENY_VIEW_FEINSSN	This Access Right will prevent the User from viewing the FEIN or SSN field in the AEC TRAK module.
AEC TRAK	EDIT_RESTRICTED_MORE_INFO	
AEC TRAK	FULL ACCESS	This Access Right is equivalent to granting the User all other rights (except DENY_ACCESS, CAN_ATTACH & DELETE DOCUMENTS, CAN_ATTACH & DELETE IMAGES)
AEC TRAK	RESTRICT_VIEW_ATTACHMENTS	This Access Right will prevent 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, “Record Types.”
CodeTRAK	CAN ADD CHRONOLOGY	
CodeTRAK	CAN ADD FEE	User must have CAN EDIT FEE.
CodeTRAK	CAN ADD INSPECTIONS	
CodeTRAK	CAN ADD VIOLATIONS	
CodeTRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
CodeTRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
CodeTRAK	CAN DELETE CHRONOLOGY	
CodeTRAK	CAN DELETE FEE	User must have CAN EDIT CASE and CAN EDIT FEE.
CodeTRAK	CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS
CodeTRAK	CAN EDIT CASE	
CodeTRAK	CAN EDIT CHRONOLOGY	
CodeTRAK	CAN EDIT FEE	
CodeTRAK	CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
CodeTRAK	CAN EDIT INSPECTIONS	
CodeTRAK	CAN EDIT VIOLATION NOTES	

Module	Privilege Title	Description
CodeTRAK	CAN EDIT VIOLATIONS	
CodeTRAK	CAN PAY FEE	
CodeTRAK	CAN UNPAY FEE	
CodeTRAK	CAN_ATTACH_PARENT_PROJECT	
CodeTRAK	CAN_ADD_CASE	
CodeTRAK	CAN_DISABLE_NOTES_DATESTAMP	
CodeTRAK	CAN_DUPLICATE_CASE	
CodeTRAK	CAN_EDIT_CHRONOLOGY_NOTES	User must have CAN EDIT CHRONOLOGY
CodeTRAK	CAN_OVERRIDE_PREFIX	
CodeTRAK	DENY ACCESS	This Access Right will prevent the User from accessing the CodeTRAK module.
CodeTRAK	DENY APPLY CREDIT	
CodeTRAK	DENY FEE OVERRIDE	
CodeTRAK	FULL ACCESS	This Access Right is equivalent to granting the User all other rights (except DENY_ACCESS, CAN_ATTACH & DELETE DOCUMENTS, CAN_ATTACH & DELETE IMAGES)
CodeTRAK	VIEW_PROTECTED_CONTACTS	
CRM TRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
CRM TRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
CRM TRAK	CAN CREATE NEW ISSUE	
CRM TRAK	CAN EDIT ISSUE	
CRM TRAK	CAN EDIT ISSUE NOTES	
CRM TRAK	DENY ACCESS	This Access Right will prevent the User from accessing the CRM TRAK module.
CRM TRAK	FULL ACCESS	This Access Right is equivalent to granting the User all other rights (except DENY_ACCESS, CAN_ATTACH & DELETE DOCUMENTS, CAN_ATTACH & DELETE IMAGES)
LicenseTRAK	CAN ADD INSPECTIONS	
LicenseTRAK	CAN ADD REVIEWS	
LicenseTRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
LicenseTRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.

Module	Privilege Title	Description
LicenseTRAK	CAN CREATE NEW BUSINESS	This Access Right will allow the User to Create a new business or license in the LicenseTRAK module.
LicenseTRAK	CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
LicenseTRAK	CAN DELETE REVIEWS	
LicenseTRAK	CAN EDIT BUSINESS	
LicenseTRAK	CAN EDIT CONTACTS AND SITE INFO	
LicenseTRAK	CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
LicenseTRAK	CAN EDIT INSPECTIONS	
LicenseTRAK	CAN EDIT REVIEW NOTES	
LicenseTRAK	CAN EDIT REVIEWS	
LicenseTRAK	CAN PAY FEE	
LicenseTRAK	CAN PRINT RESTRICTED DOCUMENTS	
LicenseTRAK	CAN PROCESS LOCKBOX	
LicenseTRAK	CAN UNPAY FEE	
LicenseTRAK	CAN VIEW FEE HISTORY	
LicenseTRAK	CAN_ADD_MULTICONDITIONS	
LicenseTRAK	CAN_DELETE_MULTICONDITIONS	
LicenseTRAK	CAN_DISABLE_NOTES_DATESTAMP	This Access Right will allow the User to switch OFF the automatic date/time stamping.
LicenseTRAK	CAN_EDIT_CHRONOLOGY_NOTES	
LicenseTRAK	CAN_EDIT_MULTICONDITION_NOTES	User must have the CAN_EDIT_MULTICONDITION privilege.
LicenseTRAK	CAN_EDIT_MULTICONDITIONS	
LicenseTRAK	CAN_VIEW_FEE_HISTORY	
LicenseTRAK	DENY ACCESS	This Access Right will prevent the User from accessing the LicenseTRAK module.
LicenseTRAK	DENY APPLY CREDIT	User must have CAN EDIT LICENSE.
LicenseTRAK	DENY EDIT CONTACTS AND SITE INFO	
LicenseTRAK	DENY FEE DETAILS	This right denies access to viewing fee details in the LicenseTRAK module
LicenseTRAK	DENY FEE OVERRIDE	
LicenseTRAK	DENY_VIEW_FEINSSN	This Access Right will prevent the User from viewing the FEIN or SSN field in the LicenseTRAK module.

Module	Privilege Title	Description
LicenseTRAK	FULL ACCESS	This Access Right is equivalent to granting the User all other rights (except DENY_ACCESS, CAN_ATTACH & DELETE DOCUMENTS, CAN_ATTACH & DELETE IMAGES)
PermitTRAK	CAN ADD CHRONOLOGY	
PermitTRAK	CAN ADD FEE	User must have CAN EDIT PERMIT and CAN EDIT FEE.
PermitTRAK	CAN ADD INSPECTIONS	
PermitTRAK	CAN ADD REVIEWS	
PermitTRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
PermitTRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
PermitTRAK	CAN CREATE NEW PERMIT	
PermitTRAK	CAN DELETE CHRONOLOGY	User must have CAN EDIT CHRONOLOGY.
PermitTRAK	CAN DELETE FEE	
PermitTRAK	CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.
PermitTRAK	CAN DELETE REVIEWS	User must have CAN EDIT REVIEWS.
PermitTRAK	CAN DUPLICATE PERMIT	
PermitTRAK	CAN EDIT CHRONOLOGY	
PermitTRAK	CAN EDIT FEE	User must have CAN EDIT PERMIT.
PermitTRAK	CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
PermitTRAK	CAN EDIT INSPECTIONS	
PermitTRAK	CAN EDIT PERMIT	
PermitTRAK	CAN EDIT REVIEW NOTES	User must have CAN EDIT REVIEWS.
PermitTRAK	CAN EDIT REVIEWS	
PermitTRAK	CAN PAY FEE	User must have CAN EDIT PERMIT and CAN EDIT FEE.
PermitTRAK	CAN UNPAY FEE	User must have CAN EDIT PERMIT and CAN EDIT FEE.
PermitTRAK	CAN_ADD_MULTICONDITIONS	
PermitTRAK	CAN_ADD_VALUATION	
PermitTRAK	CAN_ATTACH_ON_LOCKED_PERMITS	
PermitTRAK	CAN_ATTACH_PARENT_PERMIT	User must have CAN EDIT PERMIT.
PermitTRAK	CAN_ATTACH_PARENT_PROJECT	
PermitTRAK	CAN_DELETE_MULTICONDITIONS	

Module	Privilege Title	Description
PermitTRAK	CAN_DISABLE_NOTES_DATESTAMP	User must have FULL ACCESS.
PermitTRAK	CAN_EDIT_CHRONOLOGY_NOTES	User must have CAN EDIT CHRONOLOGY.
PermitTRAK	CAN_EDIT_MULTICONDITION_NOTES	User must have CAN_EDIT_MULTICONDITIONS.
PermitTRAK	CAN_EDIT_MULTICONDITIONS	
PermitTRAK	CAN_EDIT_VALUATION	User must have CAN EDIT PERMIT.
PermitTRAK	CAN_OVERRIDE_PREFIX	
PermitTRAK	DENY ACCESS	This Access Right will prevent the User from accessing the PermitTRAK module.
PermitTRAK	DENY APPLY CREDIT	
PermitTRAK	DENY FEE OVERRIDE	
PermitTRAK	FULL ACCESS	This Access Right is equivalent to granting the User all other rights (except DENY_ACCESS, CAN_ATTACH & DELETE DOCUMENTS, CAN_ATTACH & DELETE IMAGES)
PermitTRAK	PERM DELETE BOND	User must have PERMIT EDIT BOND and CAN EDIT FEE.
PermitTRAK	PERM EDIT BOND	
PermitTRAK	PERM FULL BOND ACCESS	This Access Right is equivalent to granting the user all BOND privileges
PermitTRAK	PERM INSERT BOND	
PermitTRAK	PERM PAY BOND	
PermitTRAK	PERM REDUCE/RELEASE BOND	
PermitTRAK	PERM UNPAY BOND	User must have CAN EDIT PERMIT and CAN EDIT BOND.
ProjectTRAK	CAN ADD CHRONOLOGY	
ProjectTRAK	CAN ADD FEE	User must have CAN EDIT PROJECT.
ProjectTRAK	CAN ADD INSPECTIONS	
ProjectTRAK	CAN ADD REVIEWS	
ProjectTRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
ProjectTRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
ProjectTRAK	CAN CREATE NEW PROJECT	
ProjectTRAK	CAN DELETE CHRONOLOGY	User must have CAN EDIT CHRONOLOGY.
ProjectTRAK	CAN DELETE FEE	User must have CAN EDIT FEE and CAN EDIT PROJECT.
ProjectTRAK	CAN DELETE INSPECTIONS	User must have CAN EDIT INSPECTIONS.

Module	Privilege Title	Description
ProjectTRAK	CAN DELETE REVIEWS	User must have CAN EDIT REVIEWS.
ProjectTRAK	CAN DUPLICATE PROJECT	
ProjectTRAK	CAN EDIT CHRONOLOGY	
ProjectTRAK	CAN EDIT FEE	User must have CAN EDIT PROJECT.
ProjectTRAK	CAN EDIT INSPECTION NOTES	User must have CAN EDIT INSPECTIONS.
ProjectTRAK	CAN EDIT INSPECTIONS	
ProjectTRAK	CAN EDIT PROJECT	
ProjectTRAK	CAN EDIT REVIEW NOTES	User must have CAN EDIT REVIEWS
ProjectTRAK	CAN EDIT REVIEWS	
ProjectTRAK	CAN PAY FEE	User must have CAN EDIT FEE and CAN EDIT PROJECT.
ProjectTRAK	CAN UNPAY FEE	User must have CAN EDIT FEE and CAN EDIT PROJECT.
ProjectTRAK	CAN_ADD_MULTICONDITIONS	
ProjectTRAK	CAN_ADD_PROFFERS	NOT AVAILABLE TO ALL TRAKIT IMPLEMENTATIONS
ProjectTRAK	CAN_ATTACH_PARENT_PROJECT	User must have CAN CREATE NEW PROJECT and CAN EDIT PROJECT.
ProjectTRAK	CAN_DELETE_MULTICONDITIONS	User must have CAN_EDIT_MULTICONDTIONS.
ProjectTRAK	CAN_DELETE_PROFFERS	NOT AVAILABLE TO ALL TRAKIT IMPLEMENTATIONS
ProjectTRAK	CAN_DISABLE_NOTES_DATESTAMP	
ProjectTRAK	CAN_EDIT_CHRONOLOGY_NOTES	User must have CAN EDIT CHRONOLOGY.
ProjectTRAK	CAN_EDIT_MULTICONDITION_NOTES	User must have CAN_EDIT_MULTICONDITIONS.
ProjectTRAK	CAN_EDIT_MULTICONDITIONS	
ProjectTRAK	CAN_EDIT_PROFFERS	NOT AVAILABLE TO ALL TRAKIT IMPLEMENTATIONS
ProjectTRAK	CAN_OVERRIDE_PREFIX	
ProjectTRAK	DENY ACCESS	
ProjectTRAK	DENY APPLY CREDIT	
ProjectTRAK	DENY FEE OVERRIDE	
ProjectTRAK	FULL ACCESS	This Access Right is equivalent to granting the User all other rights (except DENY_ACCESS, CAN_ATTACH & DELETE DOCUMENTS, CAN_ATTACH & DELETE IMAGES)
ProjectTRAK	PROJ DELETE BOND	

Module	Privilege Title	Description
ProjectTRAK	PROJ EDIT BOND	
ProjectTRAK	PROJ FULL BOND ACCESS	This Access Right is equivalent to granting the user all BOND privileges
ProjectTRAK	PROJ INSERT BOND	
ProjectTRAK	PROJ PAY BOND	
ProjectTRAK	PROJ REDUCE/RELEASE BOND	User must have CAN EDIT BOND
ProjectTRAK	PROJ UNPAY BOND	User must have CAN EDIT BOND privileges.
Land/GeoTRAK	CAN ATTACH & DELETE DOCUMENTS	Additionally, users can edit the description.
Land/GeoTRAK	CAN ATTACH & DELETE IMAGES	Additionally, users can edit the description.
Land/GeoTRAK	CAN CREATE NEW PARCEL RECORD	
Land/GeoTRAK	CAN EDIT PARCEL RECORD	
Land/GeoTRAK	CAN UNLOCK A LOCKED PARCEL	
Land/GeoTRAK	CAN_EDIT_CUSTOM_SCREENS	User must have FULL ACCESS.
Land/GeoTRAK	CAN_EDIT_MAINTENANCE_LOG	
Land/GeoTRAK	CAN_EDIT_RESTRICTION_NOTES	User must have CAN_EDIT_RESTRICTIONS
Land/GeoTRAK	CAN_EDIT_RESTRICTIONS	User must have FULL ACCESS.
Land/GeoTRAK	DENY ACCESS	Prevents using from accessing LandTRAK/ GeoTRAK
Land/GeoTRAK	FULL ACCESS	
Reports	CAN RUN RESTRICTED REPORTS	
Reports	DENY ACCESS	This Access Right will prevent the User from accessing the REPORTS module
System	CAN EDIT KEYWORDS	This Access right will allow the User to add, edit or delete Keyword definitions.
System	CAN_CHANGE_NAME	This Access Right will allow the User to change their own name in the User Information screen.
System	CAN_CHANGE_PASSWORD	This Access Right will allow the User to change their own password in the User Information screen.
System	CAN_EDIT_AEC_SETUP	This Access Right will allow the User to add or edit AEC definitions
System	CAN_EDIT_CRM_SETUP	This Access Right will allow the User to add or edit CRM TRAK settings.
System	CAN_EDIT_DLI_TABLES	Allows User to Edit DLI Tables [WHAT ARE DLI TABLES]

Module	Privilege Title	Description
System	CAN_EDIT_FEE_SCHEDULE	This Access Right allows the User to create, modify or delete Fee Schedule items from the Utilities/Maintenance screen.
System	CAN_EDIT_GEO_SETUP	This Access Right will allow the User to add or edit LandTRAK definitions
System	CAN_EDIT_INSPECTION_CONTROL	This Access Right will allow the User to create, modify or delete Inspection types Inspector names and standard inspection comments.
System	CAN_EDIT_LICENSE_TYPES	This Access Right will allow the User to add or edit Business License definitions
System	CAN_EDIT_MAIN_CONTROL	This Access Right will allow the User to edit the System-wide Main control table (located in the CentralSquare primary database).
System	CAN_EDIT_PERMIT_TYPES	This Access right will allow the User to add, edit or delete Permit Type definitions.
System	CAN_EDIT_PROJECT_TYPES	This Access right will allow the User to add, edit or delete Project Type definitions.
System	CAN_EDIT_REVIEW_CONTROL	This Access Right will allow the User to create, modify or delete Review types Reviewer names and standard review comments.
System	CAN_EDIT_STREET_NAMES	This Access Right will allow the User to create or edit standard Street Names as well as address ranges and Street Name aliases.[Is this available in .Net]
System	CAN_EDIT_SYSTEM_PREFERENCES	This Access Right will allow the User to edit the SYSTEM-wide Preferences.
System	CAN_EDIT_TIMETRAK_TYPES	This Access Right will allow the User to edit the TimeTRAK types.
System	CAN_EDIT_USER_NAMES	This Access Right will allow the User to create modify or delete other User Names from the system.
System	CAN_EDIT_VALUATION_SCHEDULE	This Access Right will allow the User to create, modify or delete Valuation Schedule items from the Utilities/Maintenance screen.
System	CAN_EDIT_VIOLATION_TYPES	This Access Right will allow the User to add, edit or delete Code Enforcement Type definitions.
System	CAN_UPDATE_REPORTS	This Access Right will allow the User to select the <Update Standard Reports> function on the Utilities/Maintenance screen.
System	CAN_VIEW_EMARKUPS	Allows user to view eMarkups.

Module	Privilege Title	Description
System	CAN_VIEW_RECENT_MODS	This Access Right will allow the User to view the summary of Recent Modifications.
System	CAN_VOID_INVOICES	Allows User to void Invoices.
System	DENY_VIEW_EMARKUPS	Prevents user from viewing eMarkups
System	FULL ACCESS	This Access Right is equivalent to granting the User all other rights for accessing the System-wide functions on the Utilities/Maintenance screen.
System	OVERRIDE_INSPECTOR_LOCK	This Access Right will allow User to edit Inspector name.
System	OVERRIDE_UDFNOTES_LOCK	This Access Right will allow 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

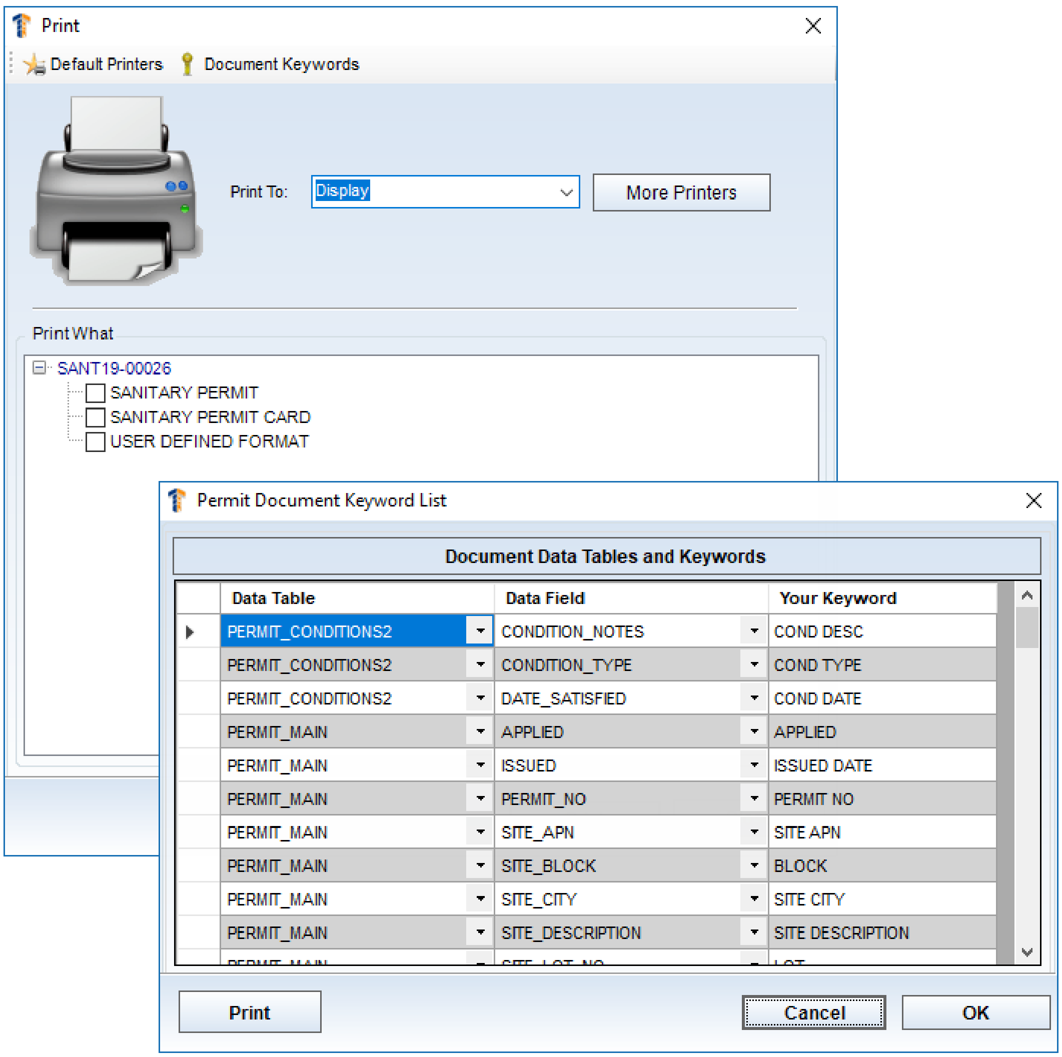
1. Click the group name in the Group Privileges list.
2. Select the privileges to apply to the group from the **Available Privileges**. For a list of TRAKiT privileges and their definitions, see "User Privileges."
3. Click **Save**.

Merge Documents

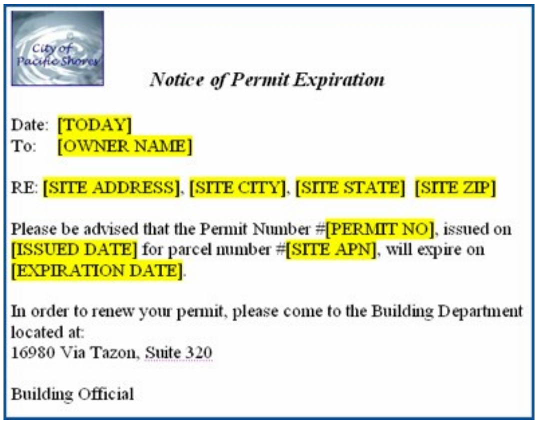
Merge documents provide the ability to insert data from a TRAKiT record into a Microsoft Word document template.

Create a Merge Document

1. Create the main document in Microsoft Word. For example, if you are creating a new notification letter to property owners in TRAKiT, add the logos, formatting, and text that are the same for every owner.
2. Add keywords to the document where you want to insert unique record information from TRAKiT:
    a. Open the Print screen and click Document Keywords to view a list of keywords for that TRAKiT application. You can click Print to print the list for easy reference.



    b. In your document, enclose keywords in square brackets (e.g., [PERMIT NO]).



City of Pacific Shores

Notice of Permit Expiration

Date: [TODAY]
To: [OWNER NAME]

RE: [SITE ADDRESS], [SITE CITY], [SITE STATE] [SITE ZIP]

Please be advised that the Permit Number #[PERMIT NO], issued on [ISSUED DATE] for parcel number #[SITE APN], will expire on [EXPIRATION DATE].

In order to renew your permit, please come to the Building Department located at:
16980 Via Tazon, Suite 320

Building Official

c. Ensure that keywords are spelled exactly as they appear in the Your Keyword column.

d. Insert nonbreaking spaces before and after your keywords as necessary to ensure that the spaces are maintained during the merge. To insert a nonbreaking space, press CTRL+SHIFT+SPACEBAR.

e. If you are printing your document from the inspections screen and want to merge data for the highlighted inspection only, insert a period and an exclamation point after the keywords from the inspections table (e.g., [INSPECTION TYPE.!]).

City of Pacific Shores

Inspection Correction Notice

A/An [INSPECTION TYPE.!] inspection was conducted on [COMPLETED DATE.!] at the following address:

[SITE ADDRESS]
[SITE CITY], [SITE STATE] [SITE ZIP]

The details of the inspection include:
Result: [RESULT.!]
Notes: [INSPECTION NOTES.!]

If you have questions, please call me at (222) 555-1212.

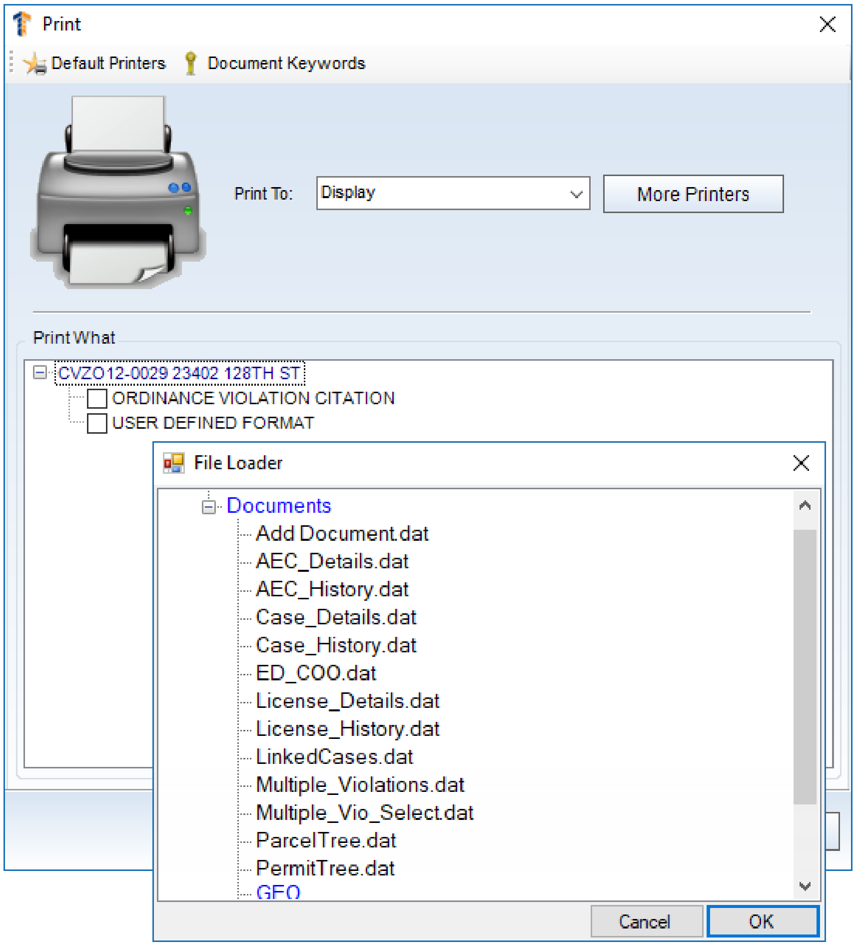
Sincerely
Mary Inspector

Tip: Step 2e can be used to create Inspection Correction notices, which are often generated for only one inspection on a record with multiple inspections.

3. Save the document and give a copy to your system administrator for inclusion in the Documents folder of the TRAKiT application server. After the system administrator has completed this task, continue to Step 4.

4. Open the Print screen.

5. Select User Defined Format.



6. Select your document from the list.
7. Set up your document options.
8. Click OK.

   Tip: Once you have tested your document, add it to the Print screen.

Create a CRM TRAK Email Template

1. Open MS 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. 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.