CENTRALSQUARE

TECHNOLOGIES

TRAKiT.Net User

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Documentation

This document is maintained by the Documentation team. To contact the Documentation team, email documentation@centralsquare.com.

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To access additional documentation, articles, and forums, visit community.centralsquare.com.

Education and Training

To contact the Customer Education team, email csu@centralsquare.com or call (800) 727-8088.

To find continuing education opportunities, visit train.superion.com/csu.

Support

To access the Support Portal, visit support.centralsquare.com.

To contact the Support team, call 1-800-292-4526, option 4.

Legal notices

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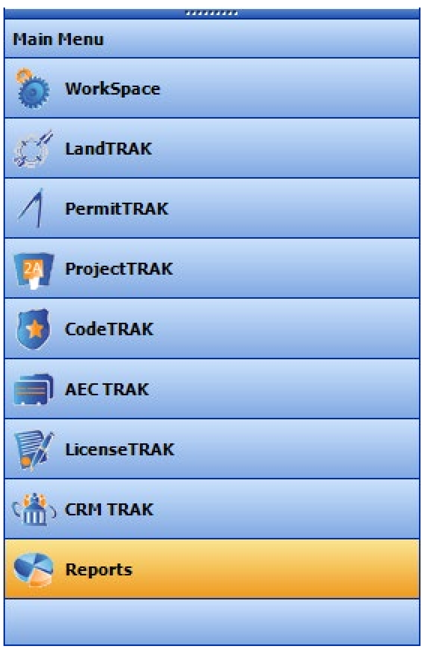
Introduction to TRAKiT®

Overview

TRAKiT is a suite of comprehensive software applications that streamline the workflow within supported departments. TRAKiT enables agencies to automate the tracking of project development, permitting, code compliance, citizen issues, and business/occupational licenses, through its applications:

- Workspace
- LandTRAK
- PermitTRAK
- ProjectTRAK
- CodeTRAK
- AEC TRAK
- LicenseTRAK
- CRM TRAK
- eTRAKiT



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 to the reader, including notes about special cases or setup-related variables, alternative methods, and benefits or suggested uses of program features.

Contacting Us

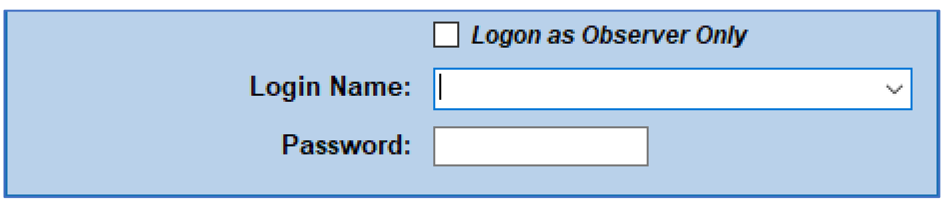
If you have TRAKiT questions or issues, contact TRAKiT Support at 1-800-292-4526, option 4.

Visit https://support.centralsquare.com for additional support resources.

Logging On

To log on to TRAKiT:

1. Double-click the TRAKiT icon  on your desktop.
2. (Optional) Select the **Logon as Observer Only** option to log on with read-only capabilities.
3. Select your login name from the list, or start typing it and when your name appears, press Tab.
4. Enter your password.



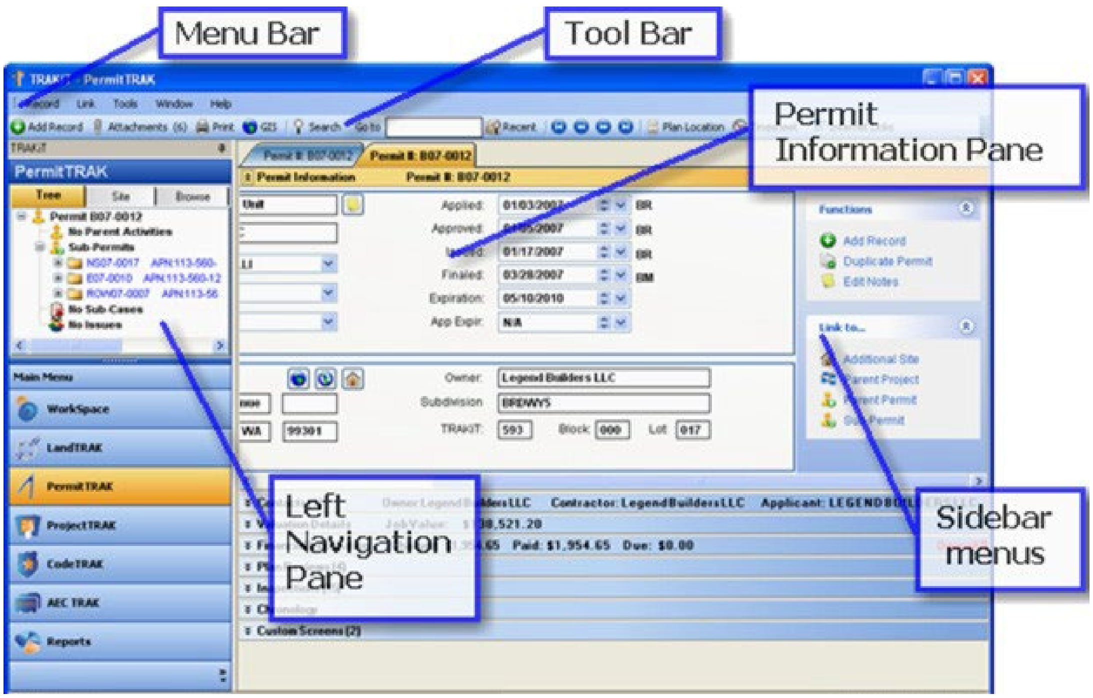
5. Press Enter.

Enterprise Interface

User Interface Elements

TRAKiT Enterprise offers numerous navigational and functional elements to improve your access to information. The following diagrams illustrate common elements in the Enterprise user interface.

User Interface Overview



- The menu bar across the top of the window organizes commands into menus.
- The toolbar provides quick access to common functions, such as adding records, adding attachments, and printing documents.
- Information panes organize record data into functional areas. For example, the **Permit Information** pane contains general information about a permit record, and the **Contacts** and **Inspections** panes are available in many modules. Users can open, close, and resize panes. Panes have sidebar menus and pane-specific functions.
- Sidebar menus provide quick access to pane-specific functions.
- The navigation pane provides links to related records, search results, and other modules.

  Tip: You can right-click in any pane to access pane-specific functions.

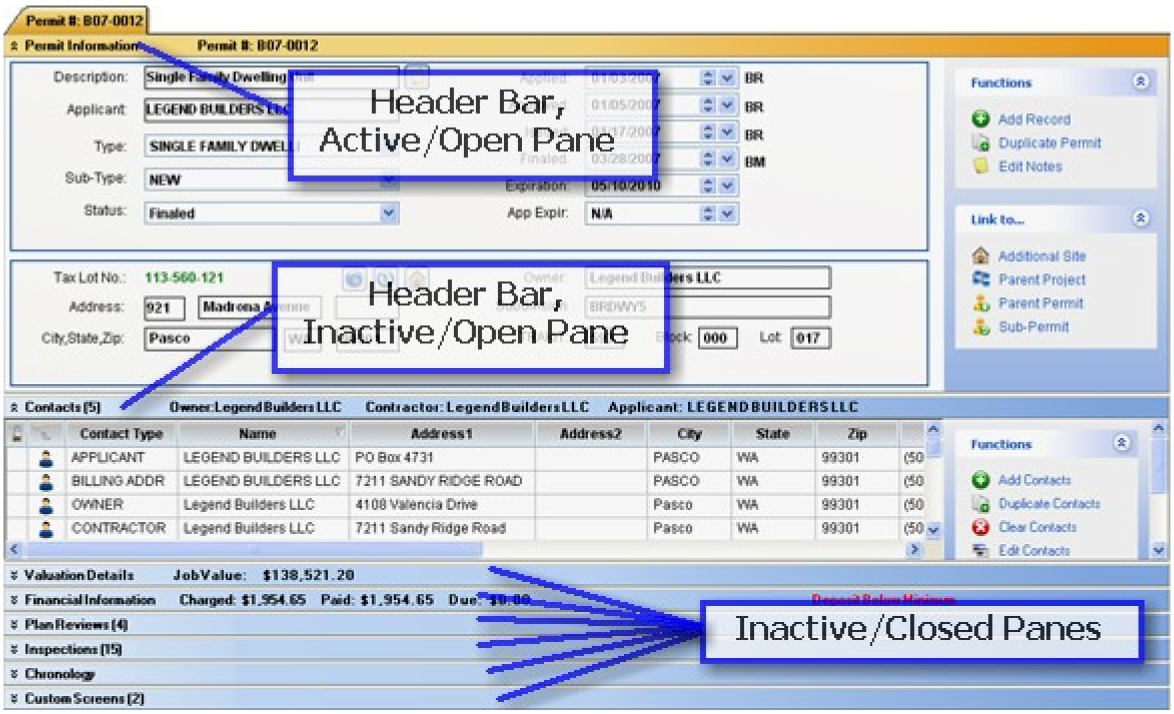
Tabs and Panes

- The active tab displays the record you are working on and appears orange.
- Inactive tabs display other open records and appear blue. Click an inactive tab to make it the active tab and view the record on that tab.

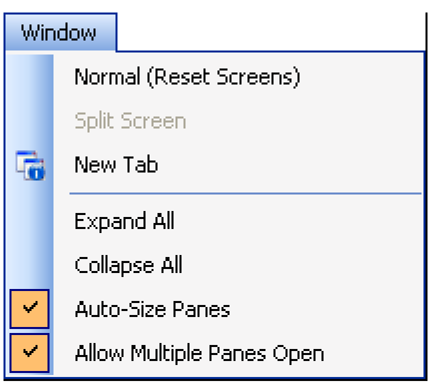
Changing Your Screen Layout

You can manipulate panes, tabs, and other elements to view record information in a number of ways.

Panes



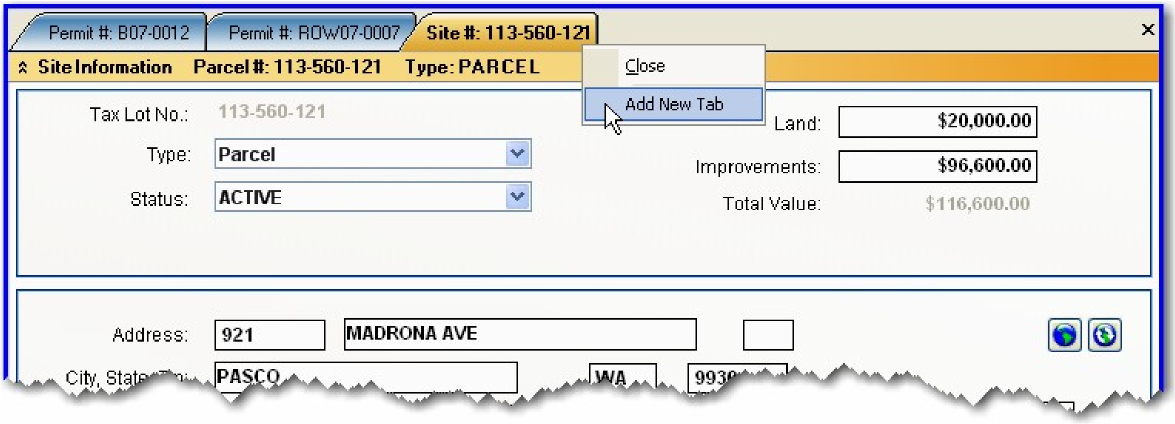
- To open or close a pane, click the **Toggle Pane** button ( ) or double-click the header bar.
- To open or close the active pane, press Ctrl+F3.
- To resize a pane manually, rest the pointer on the boundary of the pane until it becomes the resize pointer ( ), then drag the pane to the desired size.
- To allow the program to resize panes automatically, select the **Auto-Size Panes** option on the **Window** menu. Clear the option to open panes at the default size.



- The top pane can be open with any other pane. To allow more than one pane plus the top pane to be open at the same time, select the **Allow Multiple Panes Open** option on the **Window** menu. Clear the option to allow a maximum of one other pane to be open. When this option is cleared, open panes close automatically when you open another pane.
- To open all panes, select **Expand All** on the **Window** menu.
- To close all open panes except the top pane, select **Collapse All** on the **Window** menu.

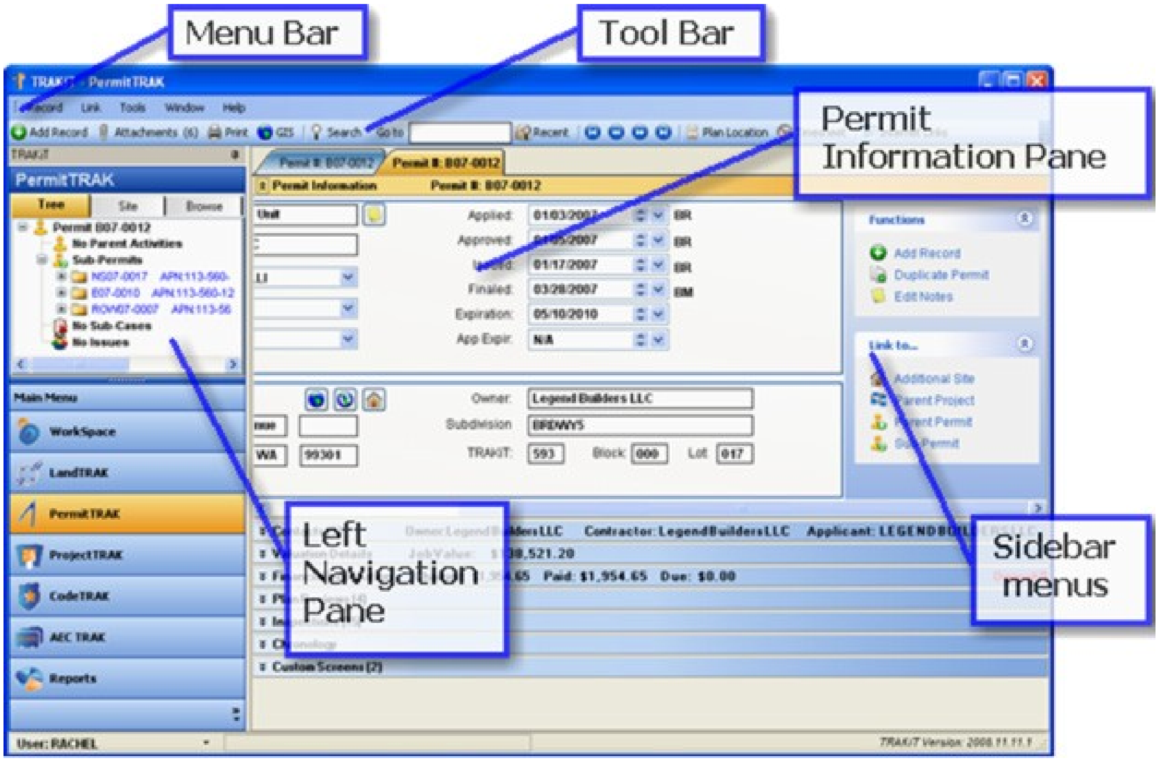
  Tip: You can restore the default appearance at any time by selecting **Normal (Reset Screens)** on the **Window** menu.

Tabs



- To open a tab, right-click a tab or click the **Window** menu and select **Add New Tab**. The record you are currently viewing is loaded into the new tab, and the new tab becomes the active tab.
- To close a tab, right-click the tab and select **Close** or click the **Close button** (×) to close the active tab. At least one tab must remain open.

Navigation Elements



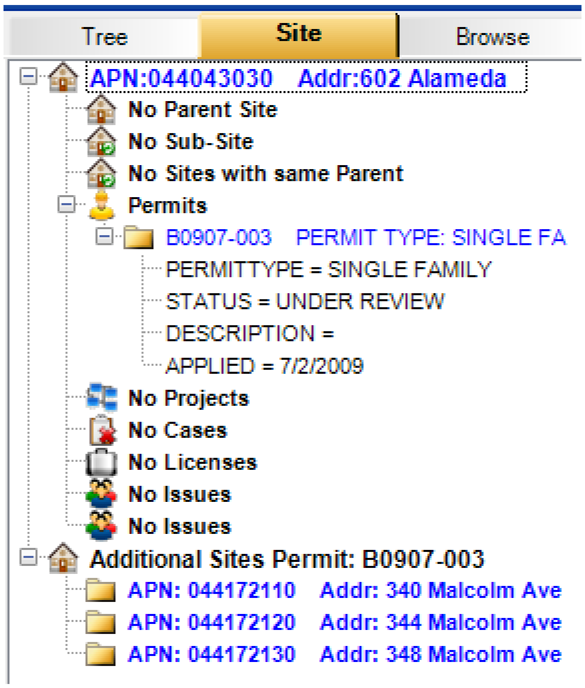
- To hide or show the sidebar menus for the current session, press Ctrl+F1.
- To hide or show the navigation pane for the current session, press Ctrl+F2.

Using the Navigation Pane

The navigation pane provides links to related records, search results, and other modules. Links to related records and search results are presented in tabs at the top of the pane.

Tip: You can hide or show the navigation pane by pressing Ctrl+F2.

Site Tab



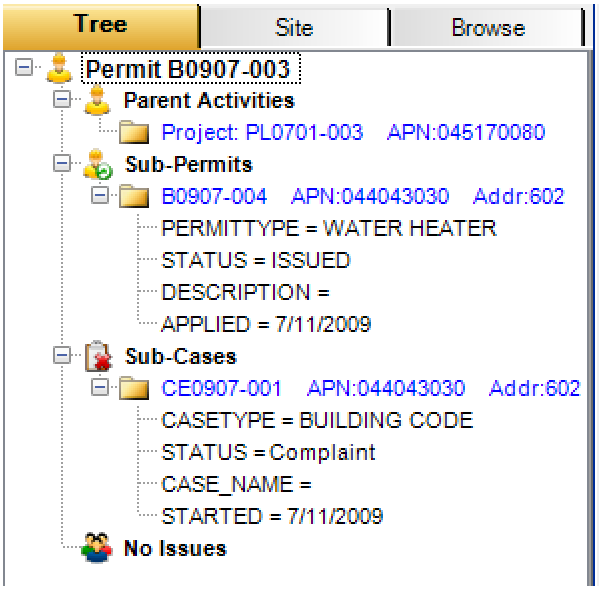
The **Site** tab displays records related to the site record in LandTRAK as well as additional sites to which the current record is linked. It represents activities that involve the same location as the current record. These records are not necessarily involved in the same process as the record. For example, the site may have a closed permit for the hot tub installed by the previous owners, while the current record may be a permit for a new garage on the same property, five years later.

- A permit, project, case, license, or issue may be linked to a site.
- An issue may be linked to an issue site as well as a complainant site.
- A permit, project, case, or license may be linked to additional sites.
- In LandTRAK, the **Site** tab displays all records linked to that site.

Tip: You can open a linked record in the current tab or on a separate tab by right-clicking on the record and selecting either **Go To Record** or **Open in New Tab**.

Tree Tab

The **Tree** tab displays records related to the current record. It represents other activities that are involved in the same process as the record. These related records are not necessarily linked to the same site in LandTRAK. For example, a project for a new development may have a subpermit for a new single family house on one lot in the development.



A permit may be linked to a parent permit, a parent project, subpermits, subcases, and issues.

- A project may be linked to a parent project, subpermits, subcases, and issues.
- A case may be linked to a parent project, a parent permit, cases, and issues.
- An issue may be linked to permits, projects, cases, and issues.
- An AEC record may be linked to a parent AEC record and sub-AEC records.
- An AEC record may be associated with permits, projects, cases, and licenses.

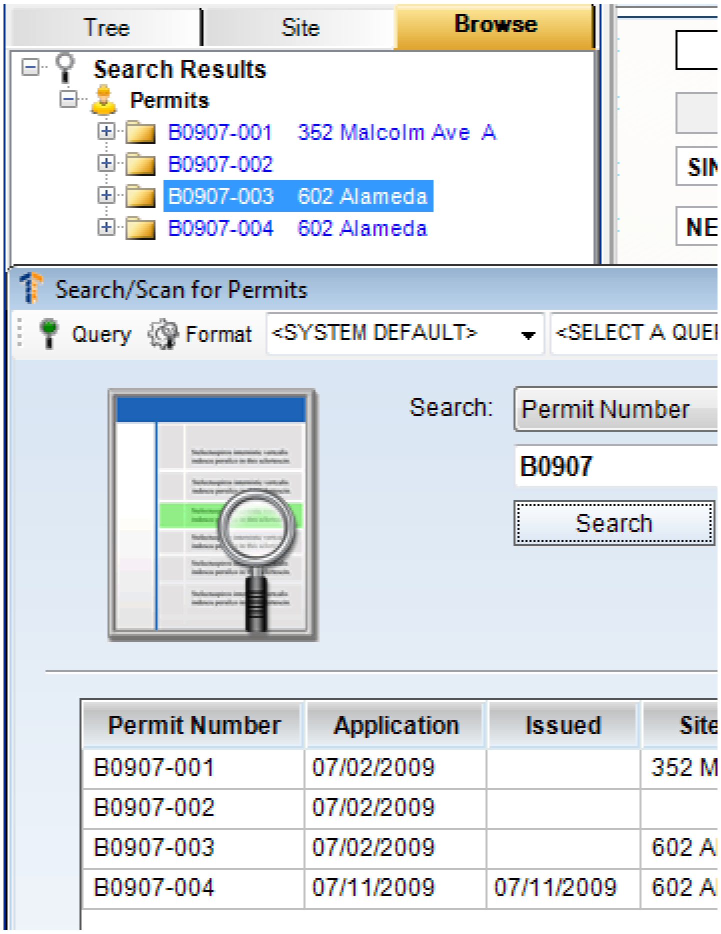
Using the Tree and Site Tabs

To use the **Tree** or **Site** tab:

1. Locate the permit, project, case, license, issue, or AEC record.
2. Click the **Tree** or **Site** tab to make it active. The active tab appears orange.
3. On the tab:
   - To view related records, click the plus sign next to a category.
   - To view more information about a record, click the plus sign next to the record.
   - To navigate directly to a related record, double-click the record name or right-click and select **Go To Record**.
   - To break the link to a record in the Tree tab, right-click the record name and select **Break Link**.

Tip: A plus sign next to a record or category indicates that it can be expanded; a minus sign indicates that it can be collapsed.

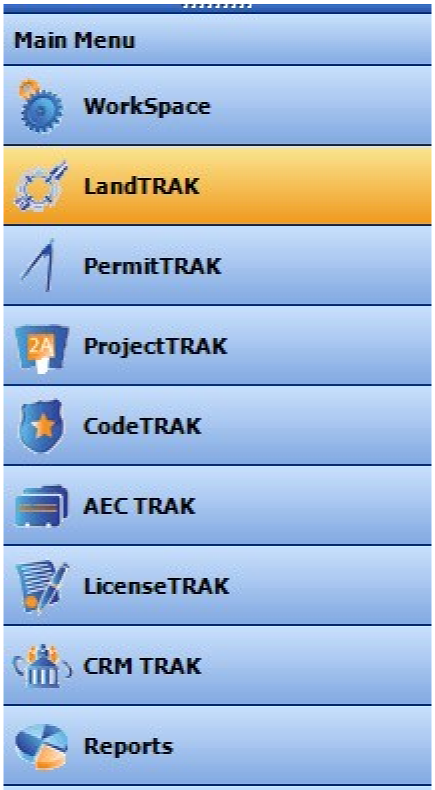
Browse Tab



The **Browse** tab displays the results of the most recent search. If the most recent search returned more than one page of results, then only the results on the same page as the selected record are loaded into the **Browse** tab.

- To step through the records in the **Browse** tab, click the move buttons ( ) on the toolbar or press the up or down arrow keys.
- To navigate directly to a record in the **Browse** tab, click the record.

Module Button



Module buttons provide a quick link to modules in TRAKiT.

- To navigate between modules using the navigation pane, click the desired module button.

User Preferences

Overview

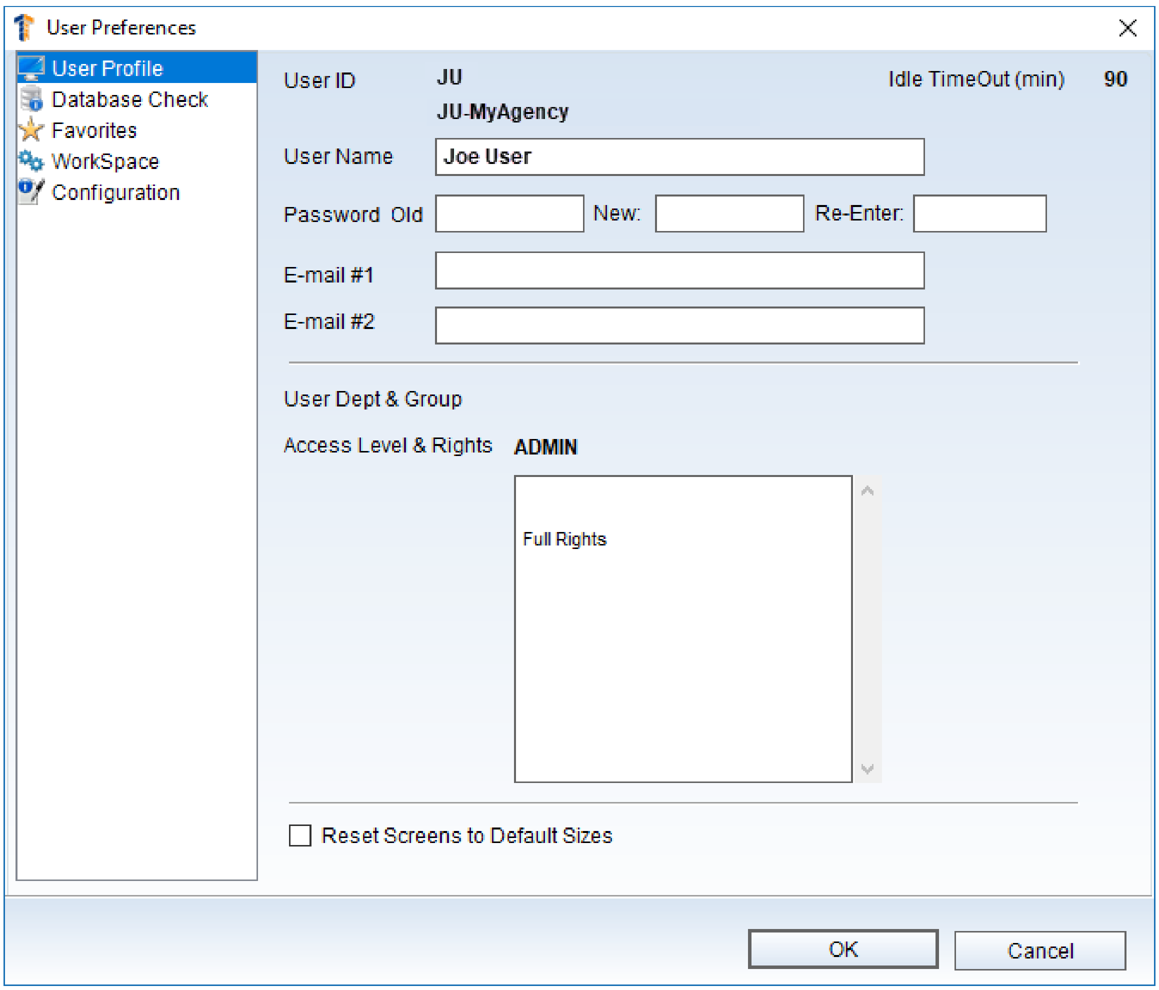
You can change your logon password (user privilege), define your email address (user privilege), view your TRAKiT privileges, define your workspace, and set additional options on the **User Preference** dialog box.

To open the **User Preference** dialog box:

1. Click your user name in the lower left corner of the TRAKiT main screen or click the arrow to the right of your name and then click **User Preference**.

   Tip: The **User Preference** dialog box is also available from the **Help** menu.

2. Click **User Profile**.

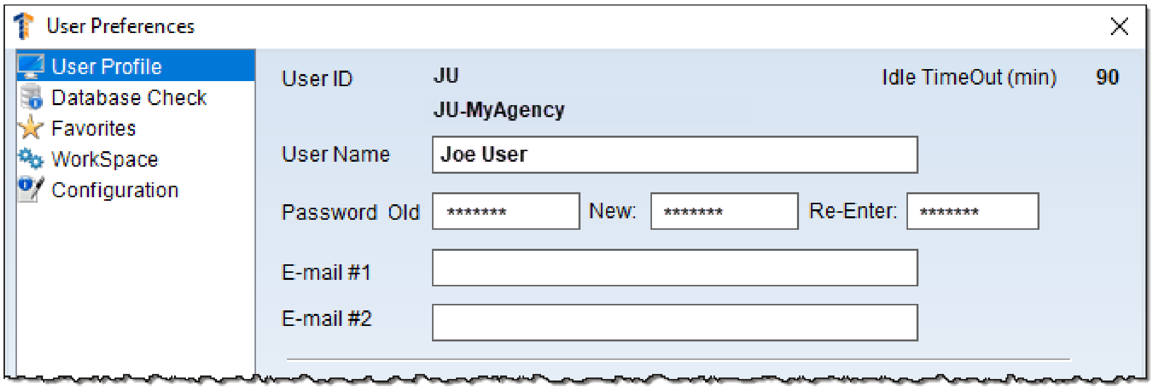


Tip: The **User Preference** dialog box can also be accessed from within each module from Help > User Preferences.

Changing Your Password

To change your TRAKiT password:

1. Open the **User Preference** dialog box.



2. Click **User Profile**.
3. Enter your current password in the **Password Old** field.
4. Enter your new password in the **New** field.
5. Enter your new password in the **Re-Enter** field.
6. Press the Tab key or click **OK**. A confirmation message appears.

Email

Overview

You can send email directly from any TRAKiT application. Depending on your setup, your system may also send certain email messages automatically. TRAKiT does not keep a record of email that has been sent; instead, copies are sent to the email address(es) you define in your user email setup.

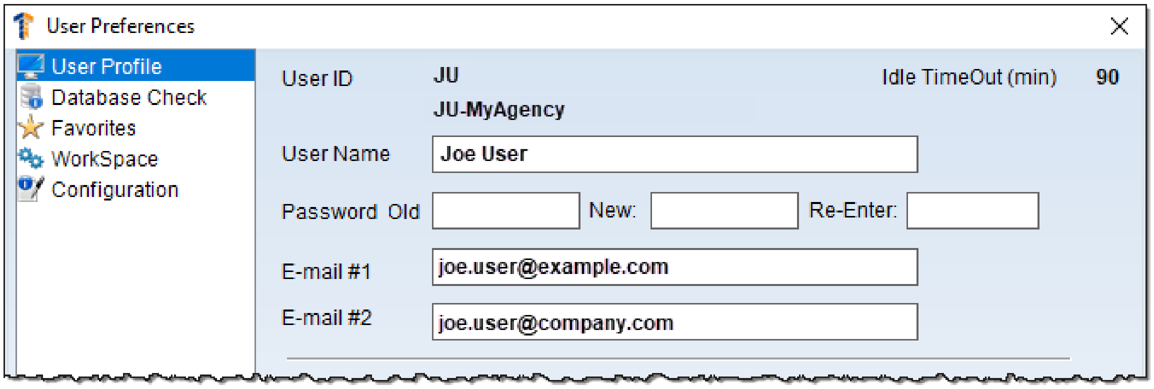
Setting up Your User Email

Tip: The system email client must be installed by a system administrator.

To set up your TRAKiT user email:

1. Open the **User Preference** dialog box.

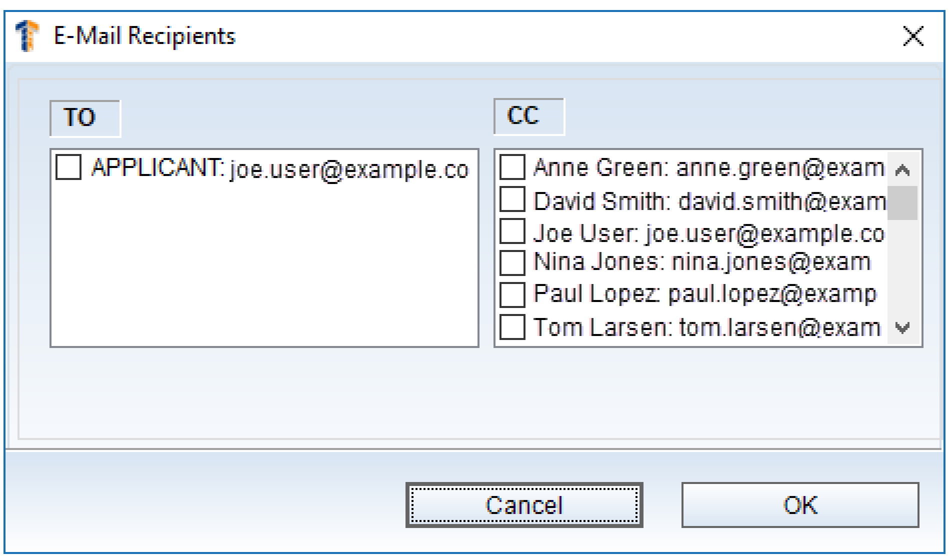
2. Click **User Profile**.
3. Enter your email address in **E-mail #1**.
4. Enter a second email address in **E-mail #2**. This email address is placed in the BCC (Blind Carbon Copy) section of your email.



Sending Email

To send email from any TRAKiT application screen:

1. On the toolbar, click **Send E-Mail** or click on the email address in the email field of a record.
2. On the left side of the screen, select the check box next to the contacts to whom you are sending the email. All contacts that are associated with the record and have an email address defined are listed.



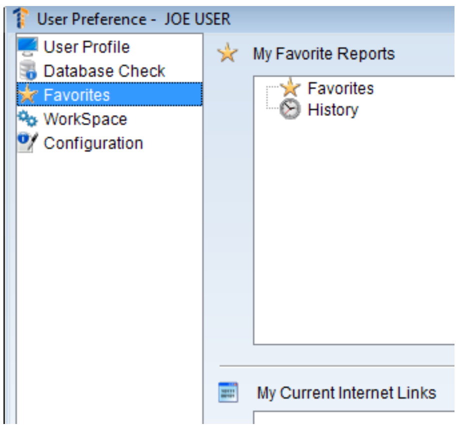
3. On the right side of the screen, select the check box next to the staff members you are copying on the email. All staff members with a user account and email address in TRAKiT are listed.
4. Click **OK**.
5. Enter your email message.

Tip: A copy is sent to your email address for record keeping.

Creating User-Defined Web Links

Users can create links to favorite websites. To add a user-defined web link:

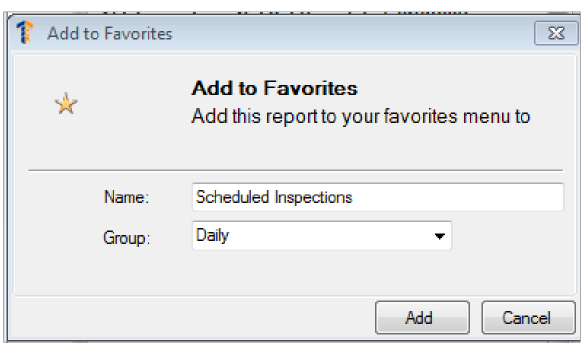
1. Click on your user name in TRAKiT.
2. Click **Favorites** from the menu.
3. Click **Add** next to **My Current Links**.
4. Enter the URL and a title for the website.
5. Click **OK**.



Favorite Reports

The **Report Favorites** tab provides the ability for the user to create a unique, grouped list of TRAKiT reports.

1. Click on your user name in TRAKiT.



2. Click **Favorites** from the menu.
3. Click **Add** next to **My Favorite Reports**.
4. Select the report from the **Report Tree**.
5. Click **OK**.
6. In the **Name** field, type a title for the report.
7. Create a group title or select from an existing group.
8. Click **Add**.

To remove a report from the favorites tab:

1. Click **Help** on the menu.
2. Select **User Preferences**.
3. Select **Favorites**.
4. Select the report you want to remove from your favorites list.
5. Click **Remove** next to My Favorite Reports.
6. Click **Yes** to confirm removal of the report from your favorites list.

WorkSpace

Overview

WorkSpace provides a central location from which you can perform your daily activities and review key information. You can set WorkSpace to open when you start TRAKiT, and you can customize the way your WorkSpace appears.

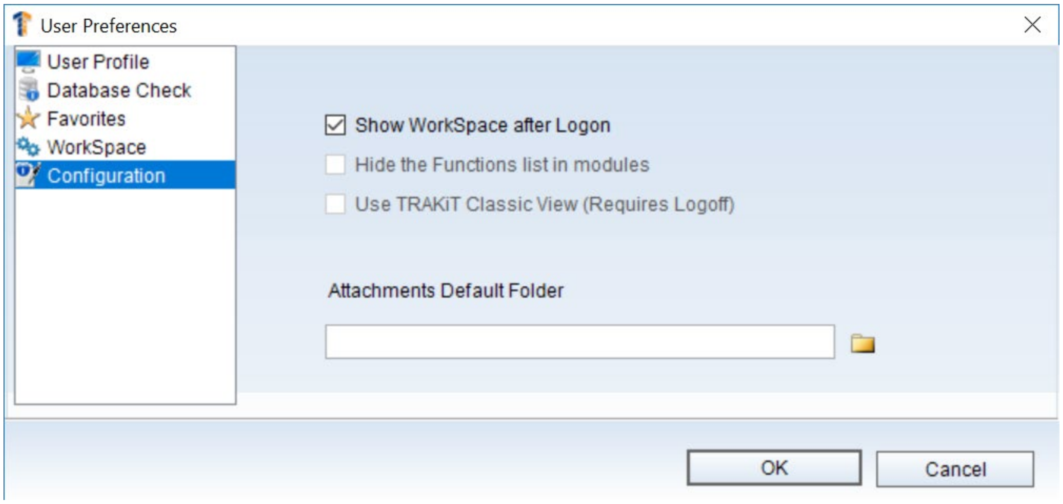
Using WorkSpace, you can:

- View inspections, reviews, and action items that are assigned to you or your staff
- Edit your inspections, reviews, and action items on any permit, project, case, or license
- Monitor and edit issues
- View open projects or cases
- Access your favorite reports
- View your email (Outlook only)
- View live charts of key business information

Customizing Your WorkSpace

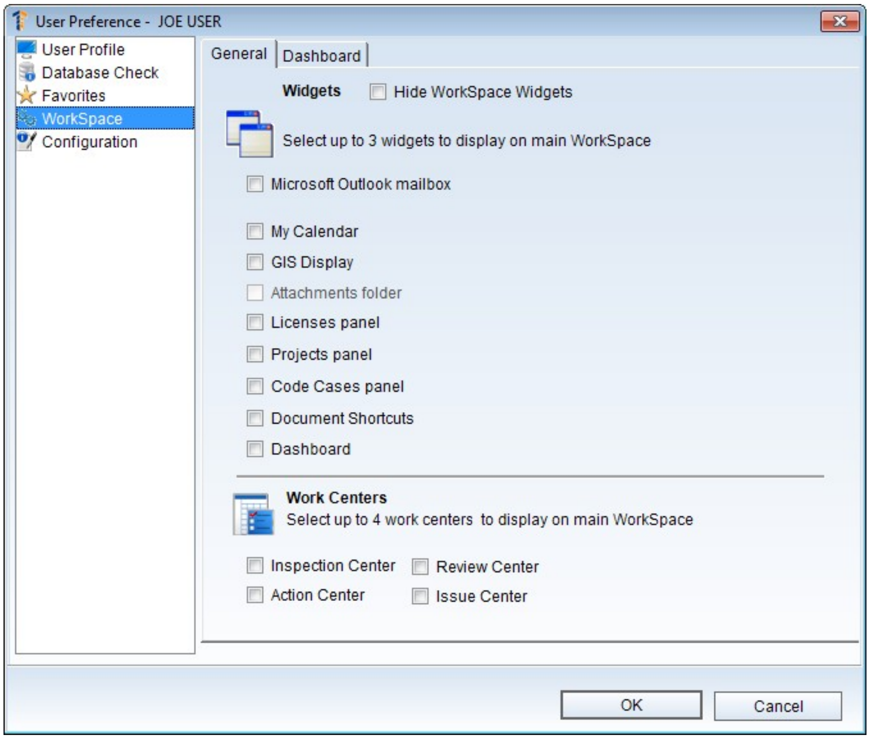
To customize your WorkSpace:

1. Open your **User Preferences**.
2. Click **Configuration** in the left pane.



Tip: Select **Show WorkSpace after Logon** to go directly to WorkSpace after logon instead of the main TRAKiT screen.

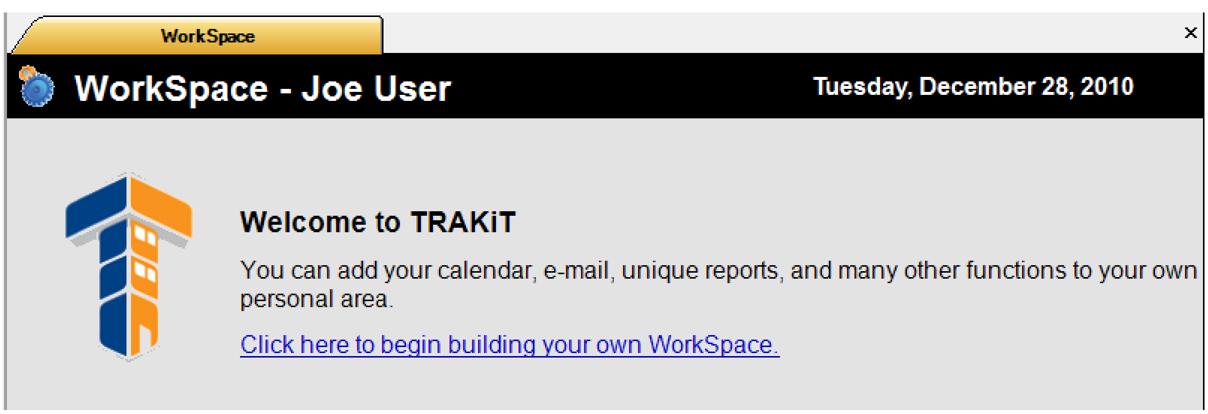
3. Click **WorkSpace** in the left pane.
4. On the **General** tab, select up to three widgets to display as top panes.
    - E-Mail
    - My Calendar
    - GIS Display
    - Attachments
    - Licenses
    - Projects
    - Cases
    - Document Shortcuts
    - Dashboard



Tip: If you don't use Widgets, select **Hide WorkSpace Widgets** to provide extra space for the Work Centers.

5. On the **General** tab, select up to four work centers to display as lower panes.
   - Inspection Center
   - Review Center
   - Action Center
   - Issue Center
6. Complete the settings for the Widgets and Work Centers you selected.

   Tip: The first time you open WorkSpace, the **Welcome** screen appears. Click the link to start customizing your WorkSpace.



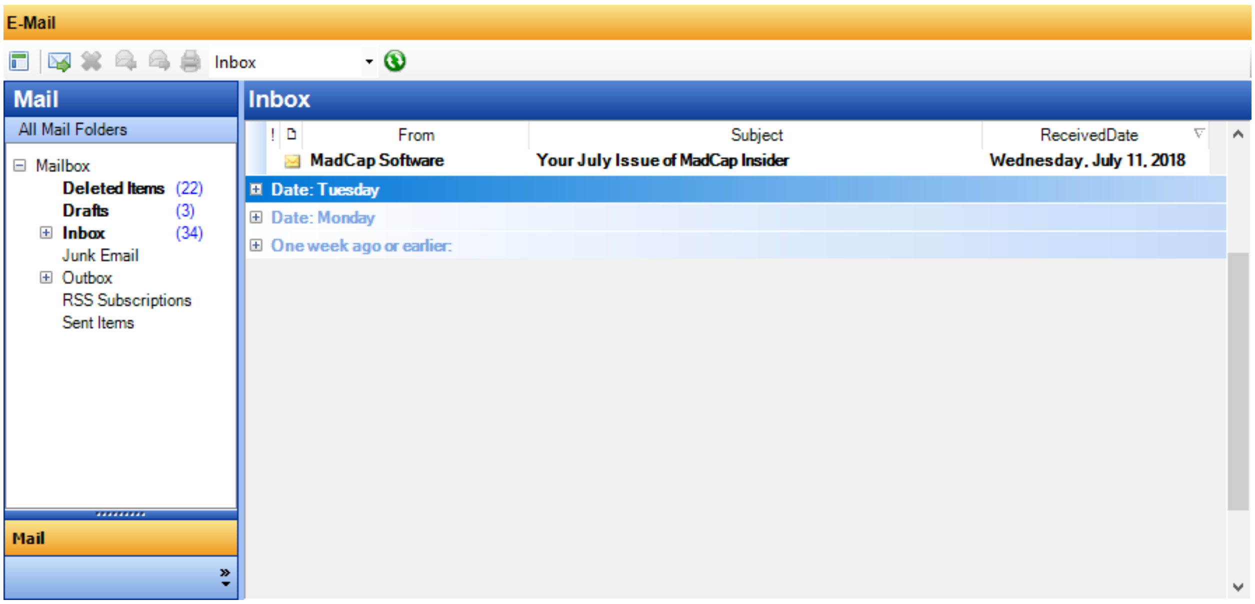
Widgets

Widgets are tools that enhance productivity and provide at-a-glance information. Widgets are enabled based on a user's unique requirements and preferences.

To enable or disable a Widget, see "Customizing Your WorkSpace."

Microsoft Outlook Mailbox

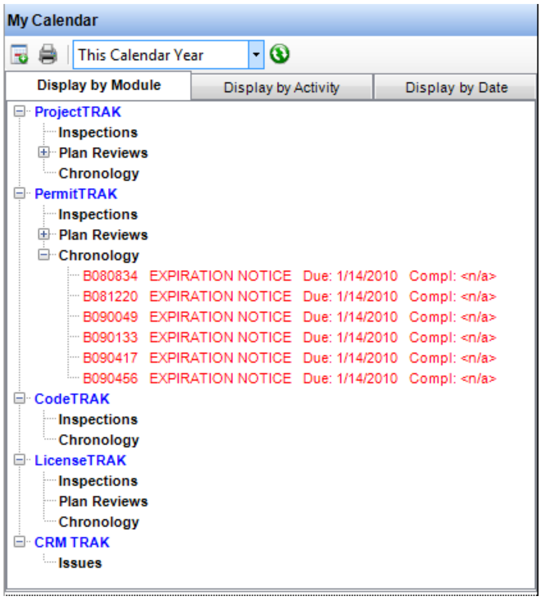
The Microsoft Outlook Mailbox widget provides the ability to interact with your email in WorkSpace.



- To display/hide the **All Mail Folders** pane, click **Toggle E-mail Navigation Pane** ( ).
- To change mailbox folder, select the new folder from the drop-down list.
- To create a new message, click **New Message** ( ).
- To delete a message, select the message and click **Delete** ( ).
- To reply to a message, select a message and click **Reply** ( ).
- To forward a message, select a message and click **Forward** ( ).
- To print a message, select the message and click **Print** ( ).
- To refresh the Inbox, click **Refresh** ( ).

My Calendar

Displays links to assigned activities (i.e., inspections, reviews, and Chronology activities) based on a specific time frame.



To configure the **My Calendar** widget:

1. Click your user name in the lower left corner of the TRAKiT main screen or click the arrow to the right of your name and click **User Preferences**.
2. Click **WorkSpace**.
3. Select the **My Calendar** widget.
4. Click **Settings**.
5. Select the modules to include in the widget.
6. Select which activities to display based on the scheduled or due date, or the completed or returned date.

   Tip: To configure **My Calendar** as a **To Do** list, select **Scheduled** or **Due** in the **Activities to Display**.
7. Outlook transfer provides the ability to select an activity and transfer it to Microsoft Outlook calendar or tasks list.

To display assigned activities in My Calendar:

1. Select a date range from the drop-down list.
2. Click **Go** ( ).
3. Activities can be viewed by module, activity, or date.

To transfer an activity to Microsoft Outlook:

1. Select the activity.
2. Click Add to Outlook ( ).

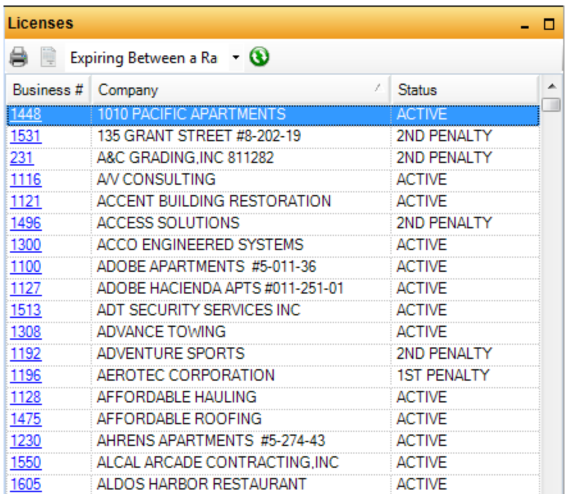
To print a list of activities:

1. Click **Print** ( ).
2. Select a **To Do List** report.
3. Click **Print**.

   Tip: Double-click on the activity to open the record that contains the activity.

Licenses Panel

The **Licenses** panel provides the ability to identify expiring licenses within a specified date range, or licenses with a specific status.



To display a list of expiring licenses:

1. Select either a predefined date range or enter a custom date range from the drop-down list.
2. Click **Go** ( ).

To display a list of licenses based on a specific status:

1. Select **Status Is**.. from the drop-down list.
2. Select one or more statuses.
3. Click **Add**.

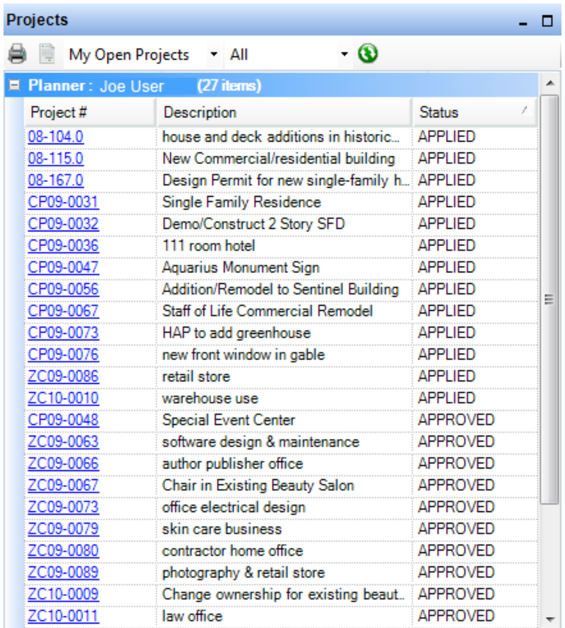
To print the list of licenses, click **Print Grid** ( ).

To export the list of licenses to Microsoft Excel, click **Export to Excel** ( ).

Tip: Double-click on the **Business #** to open the license record.

Projects Panel

The **Projects** panel provides the ability manage open projects from a centralized location.



To display your open projects (projects with no closed date in ProjectTRAK):

1. Select **My Open Projects** from the drop-down list.
2. Click **Go** ( ).

Tip: To display specific project types, select **Select Types** from the type drop-down list prior to clicking **Go**.

Tip: The **Projects** drop-down list also provides the ability to display all open projects or open projects for specific users.

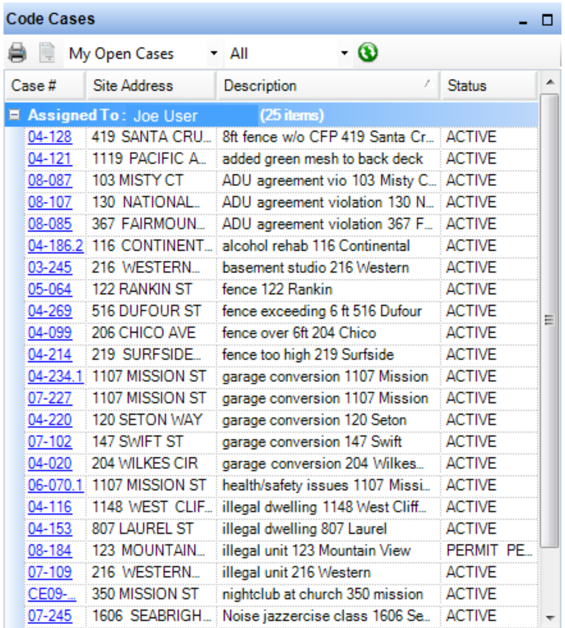
To print the list of projects, click **Print Grid** ( ).

To export the list of project to Microsoft Excel, click **Export to Excel** ( ).

Tip: Double-click on the **Project #** to open the project record.

Code Cases Panel

The **Code Cases** panel provides the ability manage active or open cases from a centralized location.



Case #	Site Address	Description	Status
04-128	419 SANTA CRU...	8ft fence w/o CFP 419 Santa Cr...	ACTIVE
04-121	1119 PACIFIC A...	added green mesh to back deck	ACTIVE
08-087	103 MISTY CT	ADU agreement vio 103 Misty C...	ACTIVE
08-107	130 NATIONAL...	ADU agreement violation 130 N...	ACTIVE
08-085	367 FAIRMOUN...	ADU agreement violation 367 F...	ACTIVE
04-186.2	116 CONTINENT...	alcohol rehab 116 Continental	ACTIVE
03-245	216 WESTERN...	basement studio 216 Western	ACTIVE
05-064	122 RANKIN ST	fence 122 Rankin	ACTIVE
04-269	516 DUFOUR ST	fence exceeding 6 ft 516 Dufour	ACTIVE
04-099	206 CHICO AVE	fence over 6ft 204 Chico	ACTIVE
04-214	219 SURFSIDE...	fence too high 219 Surfside	ACTIVE
04-234.1	1107 MISSION ST	garage conversion 1107 Mission	ACTIVE
07-227	1107 MISSION ST	garage conversion 1107 Mission	ACTIVE
04-220	120 SETON WAY	garage conversion 120 Seton	ACTIVE
07-102	147 SWIFT ST	garage conversion 147 Swift	ACTIVE
04-020	204 WILKES CIR	garage conversion 204 Wilkes...	ACTIVE
06-070.1	1107 MISSION ST	health/safety issues 1107 Missi...	ACTIVE
04-116	1148 WEST CLIF...	illegal dwelling 1148 West Cliff...	ACTIVE
04-153	807 LAUREL ST	illegal dwelling 807 Laurel	ACTIVE
08-184	123 MOUNTAIN...	illegal unit 123 Mountain View	PERMIT PE...
07-109	216 WESTERN...	illegal unit 216 Western	ACTIVE
CE09-...	350 MISSION ST	nightclub at church 350 mission	ACTIVE
07-245	1606 SEABRIGH...	Noise jazzercise class 1606 Se...	ACTIVE

To display your open cases (cases with no closed date in CodeTRAK):

1. Select **My Open Cases** from the drop-down list.
2. Click **Go** ( ).

Tip: To display specific case types, select **Select Types** from the type drop-down list prior to clicking **Go**.

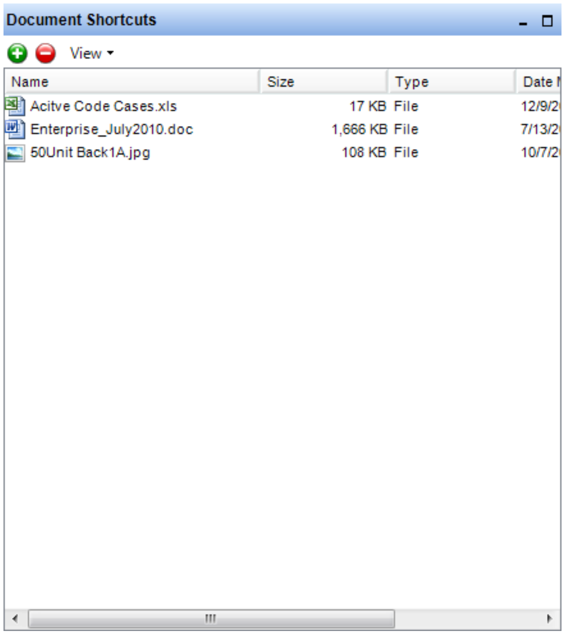
Tip: The **Cases** drop-down list also provides the ability to display all open cases or open cases for specific users.

To print the list of cases, click **Print Grid** ( ).

To export the list of cases to Microsoft Excel, click **Export to Excel** ( ).

Document Shortcuts

Document shortcuts provides the ability to add links to electronic files stored on your local computer or the network.



To add a shortcut link:

1. Click **Add Shortcut** ( ).
2. In Windows Explorer, navigate to the directory containing the file you want to link.
3. Select the file and click **Open**, or double-click the document name.

   Tip: The default shortcut name is the name of the linked file. To change the shortcut name. Click on the name and enter a new shortcut name.

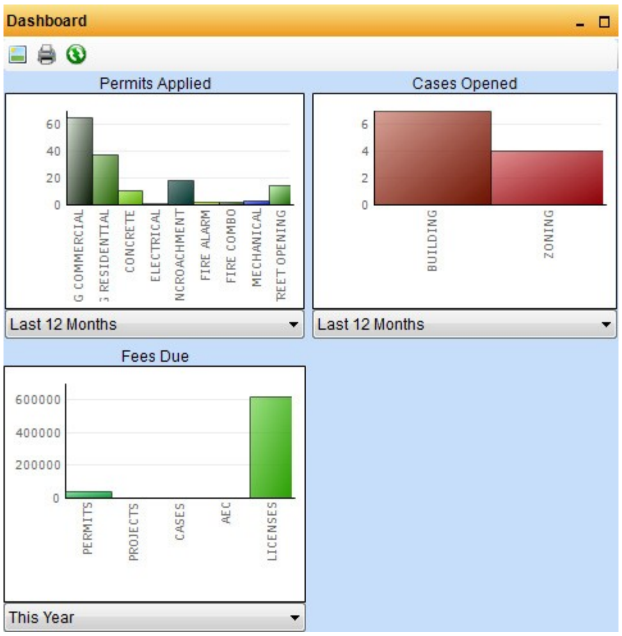
To delete a shortcut link:

1. Select the shortcut.
2. Click **Delete Shortcut** ( ).
3. Click **Yes** to confirm the deletion.

   Tip: The **View** drop-down list gives you the ability to change how your document shortcuts are displayed.

Dashboard

Dashboard provides at-a-glance access to TRAKiT data through live charts.



To configure the dashboard:

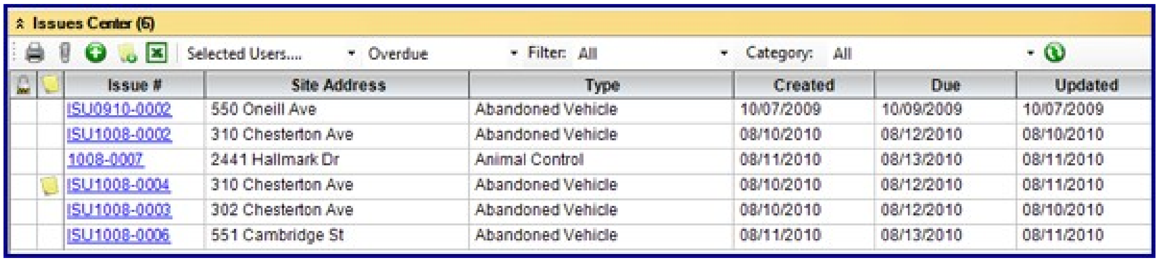
1. Click your user name in the lower left corner of the TRAKiT main screen or click the arrow to the right of your name and click **User Preferences**.
2. Click **WorkSpace**.
3. Select **Dashboard**.
4. Click the **Dashboard** tab at the top of the screen.
5. Select a maximum of four charts.
6. Click **OK**.

The following features are available in Dashboard:

- To save a chart as an image, click **Save to Image** ( ).
- To print a chart, click **Print** ( ).
- To refresh the chart, click **Go** ( ).
- To change the date range of the data in the chart, click on the date range drop-down list below the chart.

Inspection Center

The Inspection Center provides a central location from which you can view and edit inspections on any permit, project, case, or license.

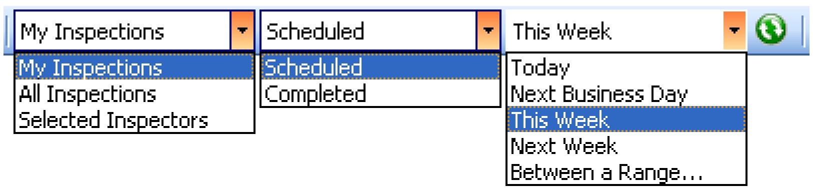


		Issue #	Site Address	Type	Created	Due	Updated
		ISU0910-0002	550 Oneill Ave	Abandoned Vehicle	10/07/2009	10/09/2009	10/07/2009
		ISU1008-0002	310 Chesterton Ave	Abandoned Vehicle	08/10/2010	08/12/2010	08/10/2010
		1008-0007	2441 Hallmark Dr	Animal Control	08/11/2010	08/13/2010	08/11/2010
		ISU1008-0004	310 Chesterton Ave	Abandoned Vehicle	08/10/2010	08/12/2010	08/11/2010
		ISU1008-0003	302 Chesterton Ave	Abandoned Vehicle	08/10/2010	08/12/2010	08/10/2010
		ISU1008-0006	551 Cambridge St	Abandoned Vehicle	08/11/2010	08/13/2010	08/11/2010

Configuring the Inspection Center

To configure the Inspection Center:

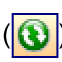
1. Open **User Preferences**.



2. Click **WorkSpace** in the left pane.
3. On the **General** tab, select the **Inspection Center** check box.

Retrieving Inspections with the Inspection Center

To retrieve inspections you wish to review or edit:

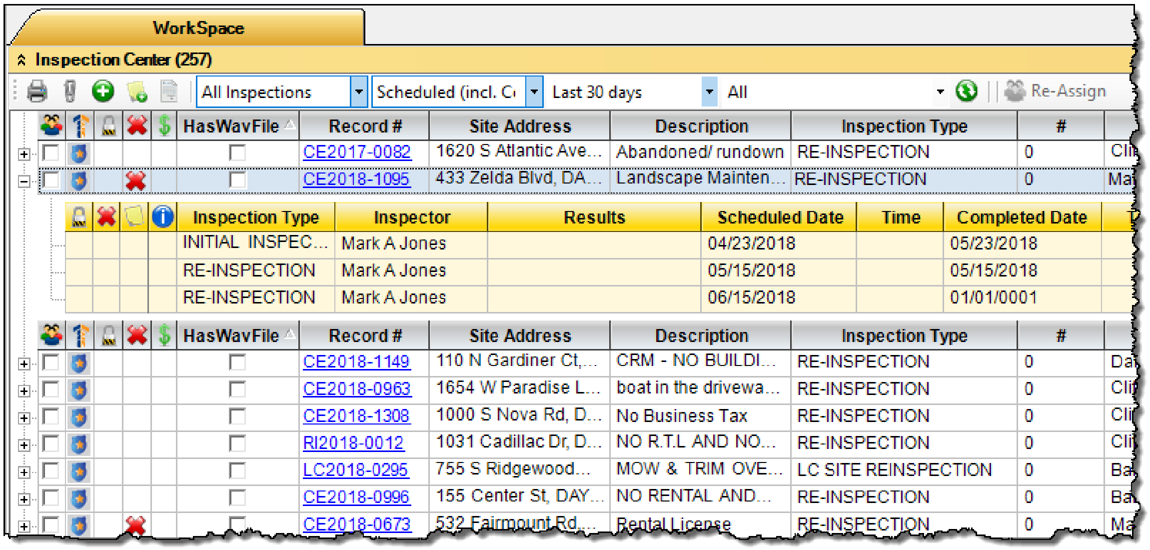
1. Select the inspections you want to view: **My Inspections** (currently logged on user), **All Inspections**, or **Selected Inspectors**.
2. Select the date by which to retrieve inspections: **Scheduled** or **Completed**.
3. Select a predefined date range from the list, or set your own date range by selecting **Between a Range**.
4. Click the **Go** button ().
5. If you chose **Selected Inspectors** in step 1, select the check box next to the inspectors' names and then click **OK**.
6. If you retrieved inspections for a range of dates in step 3, enter the date range and click **OK**.

   Tip: Overdue inspections appear in red.

Inspection Center Grid

- To sort your inspections, click the column header.
- To edit an inspection, enter information in the appropriate field.
- To view restrictions on the site address, double-click the Restrictions icon ().

- To view the balance due on the associated permit, project, case, or license record, double-click the Fees icon ($).
- To open the associated permit, project, case, or license record, click the record number link.
- To view inspection details and other inspections on the same record, click the plus sign next to the row in the grid.



Tip: The retrieved inspection appears bold in the inspection details subgrid.

Inspection Center Functions

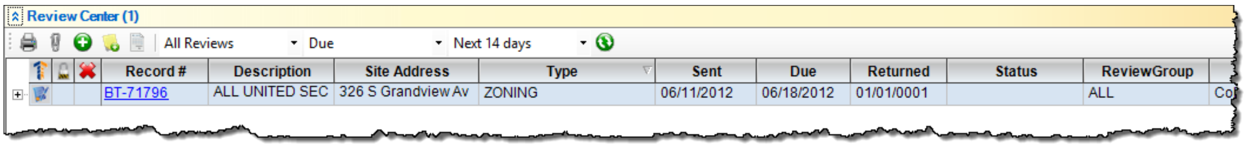
To re-assign inspections to another inspector:

1. Select the check box next to the inspections you wish to reassign.
2. Click **Re-Assign**.
3. Select the inspector to which you wish to reassign the selected inspections.

- To add attachments to the associated permit, project, case, or license record, click the Attachments button ( ).
- To add inspections to the associated permit, project, case, or license record, click the Add Inspections button ( ) or right-click and select Add Inspections.
- To generate a document for the highlighted inspection, click the Print button ( ) or right-click and select Print Inspections.
- To void the highlighted inspection, right-click and select Void Inspection.
- To add or view notes on the highlighted inspection, click the Add Notes button ( ) or right-click and select Add Notes.
- To schedule the highlighted inspection using the calendar, right-click and select **Calendar Scheduling**.
- To export the Inspection Center grid to a Microsoft Excel document, click the **Export to Excel** button.

Review Center

The Review Center provides a central location from which you can view and edit reviews on any permit, project, or license.



Configuring the Review Center

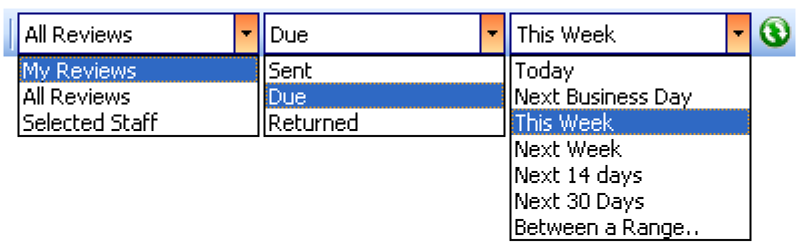
To configure the Review Center:

1. Open User Preferences.
2. Click **WorkSpace** in the left pane.
3. On the **General** tab, select the **Review Center** check box.

Retrieving Information with the Review Center

To retrieve the reviews you wish to view or edit:

1. Select the review you want to view: **My Reviews** (currently logged on user), **All Reviews**, or **Selected Staff**.



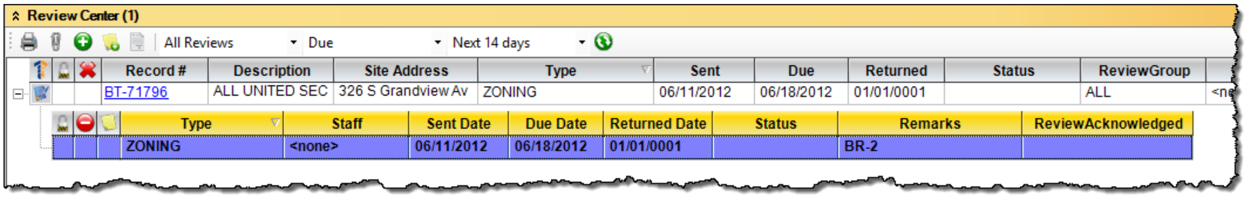
2. Select the date by which to retrieve reviews: **Sent**, **Due**, or **Returned**.
3. Select a predefined date range from the list, or set your own date range by selecting **Between a Range**.
4. Click the Go button ( ).
5. If you retrieved selected staff in step 1, select the check box next to the reviewers' names and click **OK**.
6. If you retrieved reviews for a range of dates in step 3, enter the date range and click **OK**.

   Tip: Overdue reviews appear in red.

Review Center Grid

- To sort your reviews, click the column header.
- To edit a review, enter information in the appropriate field.
- To view restrictions on the site address, double-click the Restrictions icon ( ).
- To open the associated permit, project, or license record, click the record number link.

- To view review details and other reviews on the same record, click the plus sign next to the row in the grid.



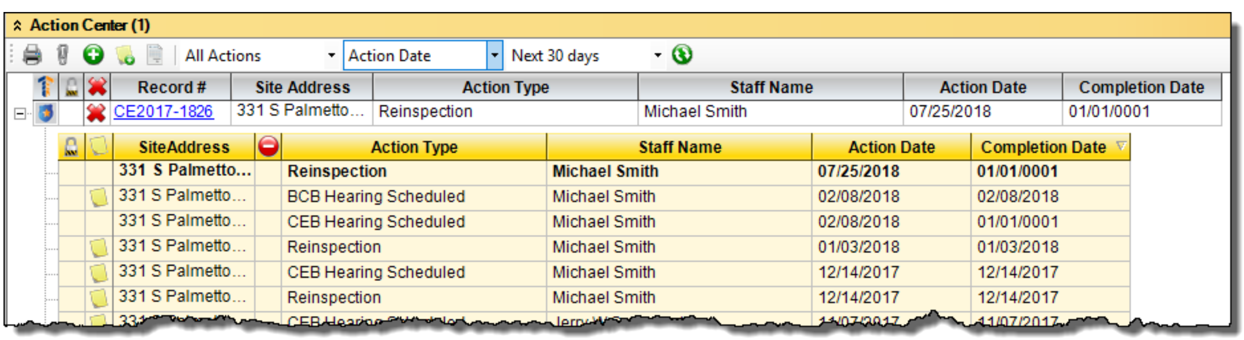
Tip: The retrieved review appears bold in the review details subgrid.

Review Center Functions

- To add attachments to the associated permit, project, or license record, click the Attachments button ( ).
- To add reviews to the associated permit, project, or license record, click the Add Reviews button ( ) or right-click and select **Add Reviews**.
- To print a Reviews History report for the associated permit, project, or license record, click the Print button ( ) or right-click and select **Print Reviews**.
- To void the highlighted review, right-click and select **Void Review**.
- To add or view notes on the highlighted review, click the Add Notes button ( ) or right-click and select **Add Notes**.
- To export the Review Center grid to a Microsoft Excel file, click the **Export to Excel** button.

Action Center

The Action Center provides a central location from which you can view and edit chronology action items on any permit, project, case, or license. When you open the Action Center after logging in, the listing is empty. Perform a search to see actions that meet specific criteria such as actions for specific staff members or with a specific completion date.



Configuring the Action Center

To configure the Action Center:

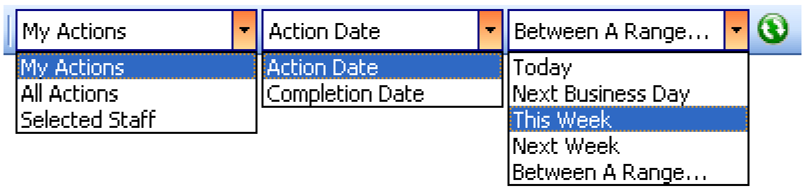
1. Open User Preferences.
2. Click WorkSpace in the left pane.

3. On the **General** tab, select the **Action Center** check box.

Retrieving Information with the Action Center

To retrieve the actions you wish to view or edit:

1. Select the staff members for whom you want to retrieve actions: **My Actions** (currently logged on user), **All Actions**, or **Selected Staff**.
2. Select the date by which to retrieve actions: **Action Date** or **Completion Date**.
3. Select a predefined date range from the list, or set your own date range by selecting **Between a Range**.



4. Click the Go button .
5. If you retrieved selected staff members in step 1, select the check box next to the staff members' names and click **OK**.
6. If you retrieved actions for a range of dates in step 3, enter the date range and click **OK**.

   Tip: Overdue actions appear in red.

Action Center Grid

- To sort your actions, click the column header.
- To edit an action, enter information in the appropriate field.
- To view restrictions on the site address, double-click the Restrictions icon ().
- To open the associated permit, project, case, or license record, click the record number link.
- To view action details and other actions on the same record, click the plus sign next to the row in the grid.

Tip: The retrieved action appears bold in the action details subgrid.

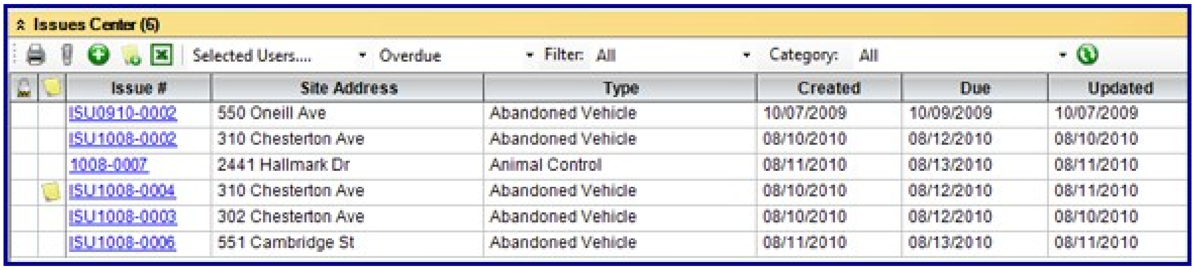
Action Center Functions

- To add attachments to the associated permit, project, case, or license record, click the Attachments button ().
- To add actions to the associated permit, project, case, or license record, click the Add Actions button () or right-click and select **Add Actions**.
- To schedule an event on the associated permit, project, case, or license record, right-click and select **Schedule Event**.
- To print a Chronology History report for the associated permit, project, case, or license record, click the Print button .

- To void the highlighted action, right-click and select **Void Action**.
- To add or view notes on the highlighted action, click the Add Notes button or right-click and select **Add Notes**.
- To export the Action Center grid to a Microsoft Excel file, click the **Export to Excel** button.

Issue Center

The Issue Center provides a central location from which you can view and edit CRM TRAK issues.



Issue #	Site Address	Type	Created	Due	Updated
ISU0910-0002	550 Oneill Ave	Abandoned Vehicle	10/07/2009	10/09/2009	10/07/2009
ISU1008-0002	310 Chesterton Ave	Abandoned Vehicle	08/10/2010	08/12/2010	08/10/2010
1008-0007	2441 Hallmark Dr	Animal Control	08/11/2010	08/13/2010	08/11/2010
ISU1008-0004	310 Chesterton Ave	Abandoned Vehicle	08/10/2010	08/12/2010	08/11/2010
ISU1008-0003	302 Chesterton Ave	Abandoned Vehicle	08/10/2010	08/12/2010	08/10/2010
ISU1008-0006	551 Cambridge St	Abandoned Vehicle	08/11/2010	08/13/2010	08/11/2010

Configuring the Issue Center

To configure the Action Center:

1. Open User Preferences.
2. Click **WorkSpace** in the left pane.
3. On the **General** tab, select the **Issue Center** check box.

Retrieving Information with the Issue Center

To retrieve the issues you wish to view or edit:

1. Select users for which to retrieve actions: **My Issues** (currently logged on user), **All Users**, or **Selected Users**.
2. Select the status of the issue: **Open**, **All**, **Overdue**, or **Closed**.
3. Select a filter: **Prefix**, **Status**, **Category**, **Department**, **Nature/Type**, or **Created Via**.
4. Select a category to apply to the filter.
5. Click the Go button .
6. If you retrieved selected users in step 1, select the check box next to the staff members' names and click **OK**.

Issue Center Grid

- To sort your issues, click the column header.
- To edit an issue, enter information in the appropriate field.
- To open the associated issue, click the Issue #.

Issue Center Functions

- To add attachments to the issue, click the Attachments button.
- To add an issue, click the Add Issues button ().
- To print a CRM TRAK document, click the Print button.
- To add or view notes on the highlighted issue, click the Add Notes button or right-click and select **Add Notes**.
- To export the Action Center grid to a Microsoft Excel file, click the **Export to Excel** button.

Locating Records

Overview

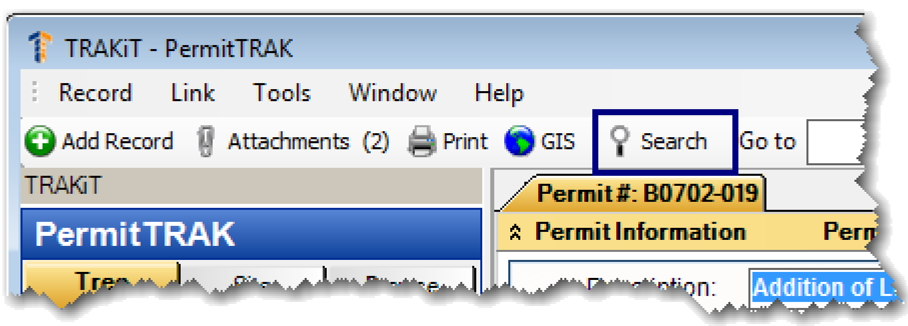
There are a number of ways to locate records in your database:

If you want to…	see this topic…
Search the database by one data field	Using Search
Customize your search screen	Creating a User-Defined Search Format
Search the database by more than one field	Creating a Query
Search multiple fields and modules	Global Search
Navigate through your search results	Using the Move Navigation Buttons
Retrieve a record when you know the record number	Using Go To
Retrieve a record you viewed recently	Using Recent

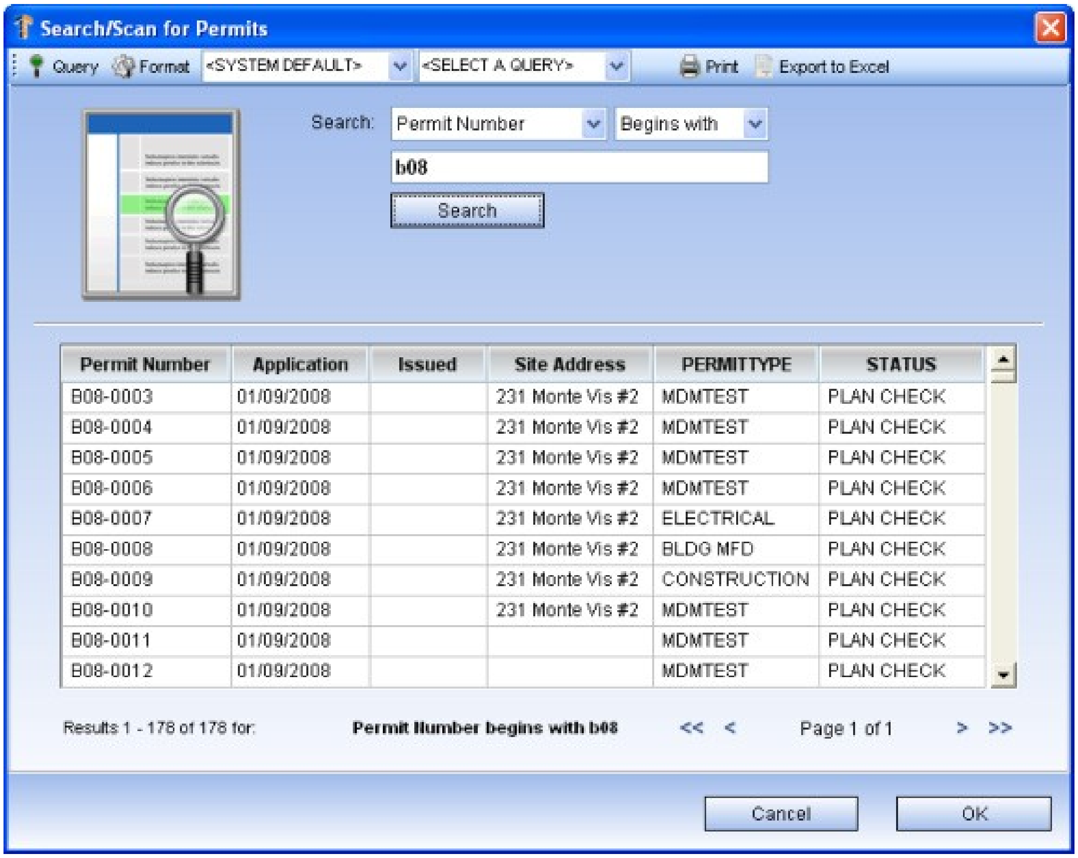
Using Search

To locate a record using Search:

1. Open PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LandTRAK, or LicenseTRAK.
2. Click **Search**.



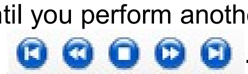
3. Select a database field to search.
4. Select an operator for the search.
5. Enter your search criteria in the **Search String** field.



Tip: The percent sign (%) can be used as a wild card to match any number of occurrences of any character. The underscore (_) can be used to match any single character.

6. Click **Search** or press Enter to display the search results in the grid.
7. Double-click a row in the grid to view a record in the application main screen.

Tips:

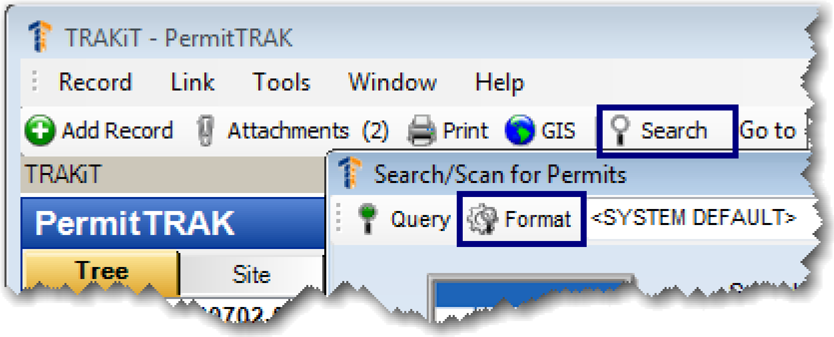
- Your search results are maintained in memory until you perform another search. To navigate through the search results, use the Move buttons  .
- Your search results can be sorted by clicking on the column headings.
- Navigate between pages of your search results by clicking next page, last page, previous page, or first page arrows.

Creating a User-Defined Search Format

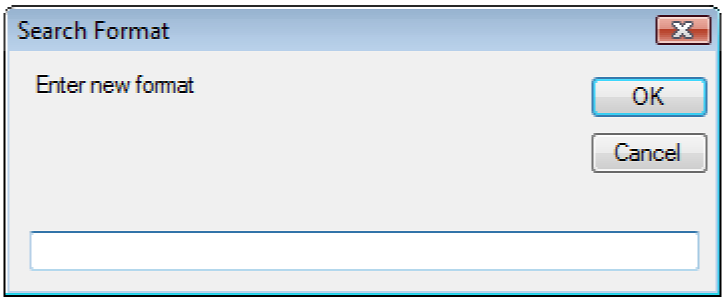
You can customize your search screen by creating your own search format in PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LandTRAK, or LicenseTRAK.

To create a user-defined search format:

1. Open PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LandTRAK, or LicenseTRAK.
2. Click **Search**.
3. Click **Format**.

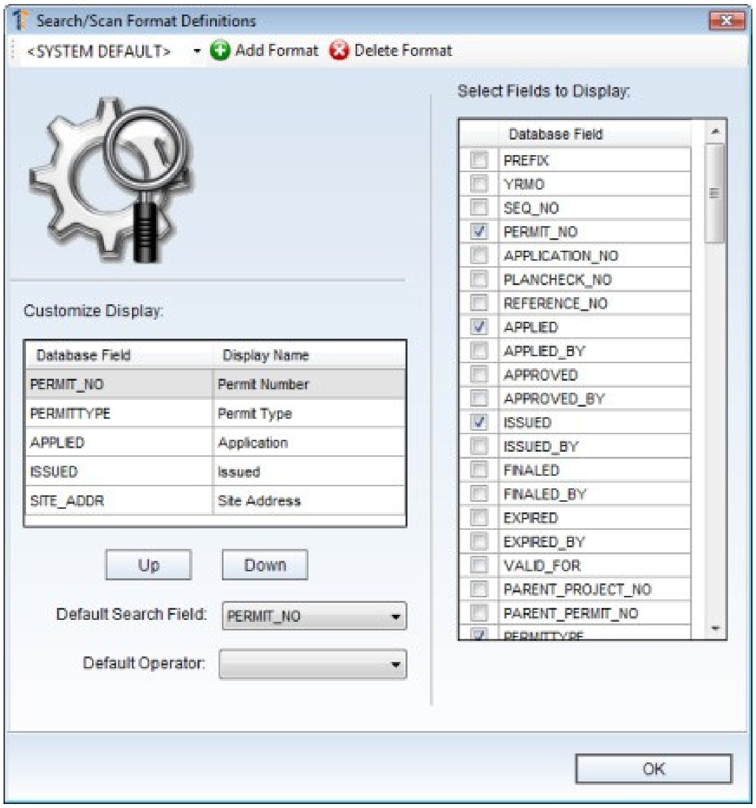


4. Click **Add Format**.
5. At the prompt, enter a name for the format, and click **OK**.



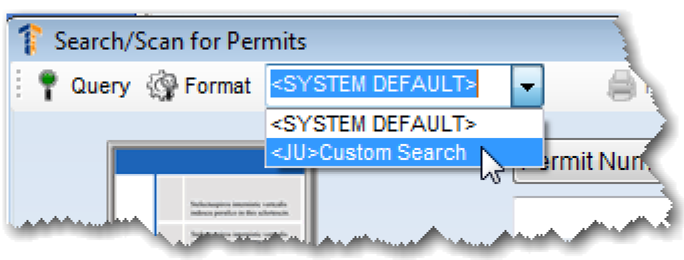
Tip: A maximum of 15 fields can be added to any single search format.

6. In **Select Fields to Display**, select which database fields to include in the **Search Fields** drop-down.
7. In **Customize Display**, enter the column names of your results grid in the **Display Name** column.
8. In **Customize Display**, define the order of the columns in your results grid by selecting a row and clicking **Up** or **Down**.
9. Select the **Default Search** field.
10. Select the **Default Operator**.



11. Click **OK** to save the format.

Tip: To switch to another search format, click the down arrow and select from the list. User-defined formats become available to all users, so it is a good idea to assign the task of format maintenance to a specific user. Many agencies maintain formats by department.



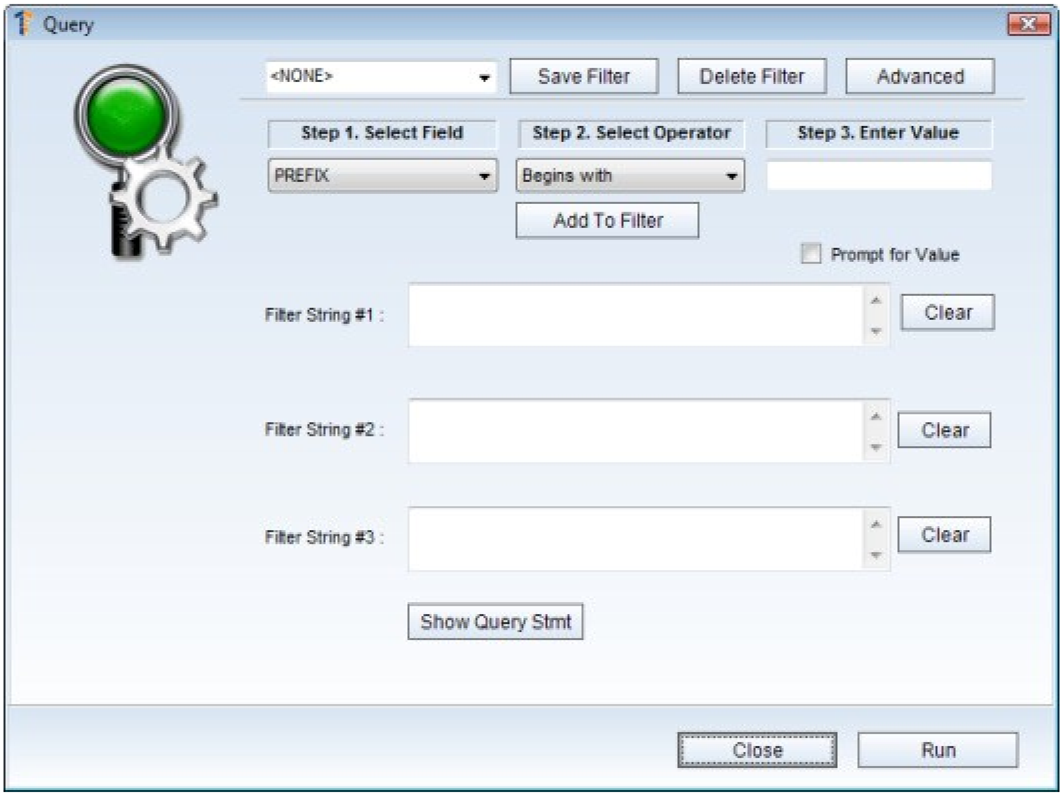
Creating a Query

A query allows you to search the database by multiple fields.

To locate a record using a query:

1. Open PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LandTRAK, or LicenseTRAK.
2. Click **Search**.
3. Click **Query**.
4. Select a field from the database.
5. Select an operator.

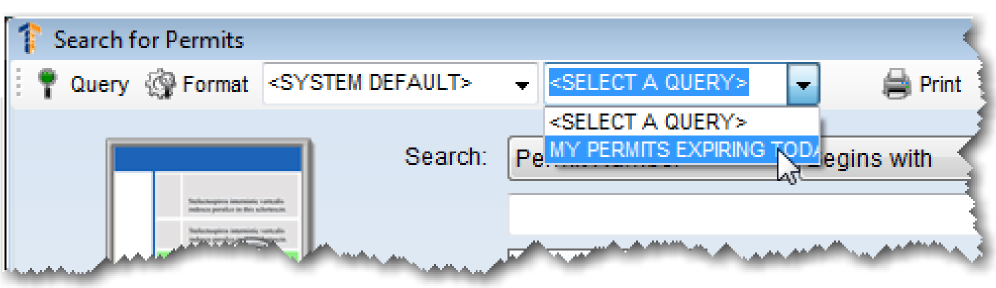
6. Enter a search value, or select the **Prompt for Value** check box to enter a value when you execute the filter.
7. Click **Add to Filter**.
8. Repeat steps 4–7 to specify up to three conditions for your filter.



Tip: If more than three fields are needed, click **Advanced** and type a query statement (requires knowledge of SQL).

9. (Optional) To save the query, click **Save Query** and enter a name at the prompt.
10. Click **Run**.

Tip: To execute a saved query from the search screen, click the down arrow and select a query from the list. Queries are unique to each user.



Global Search

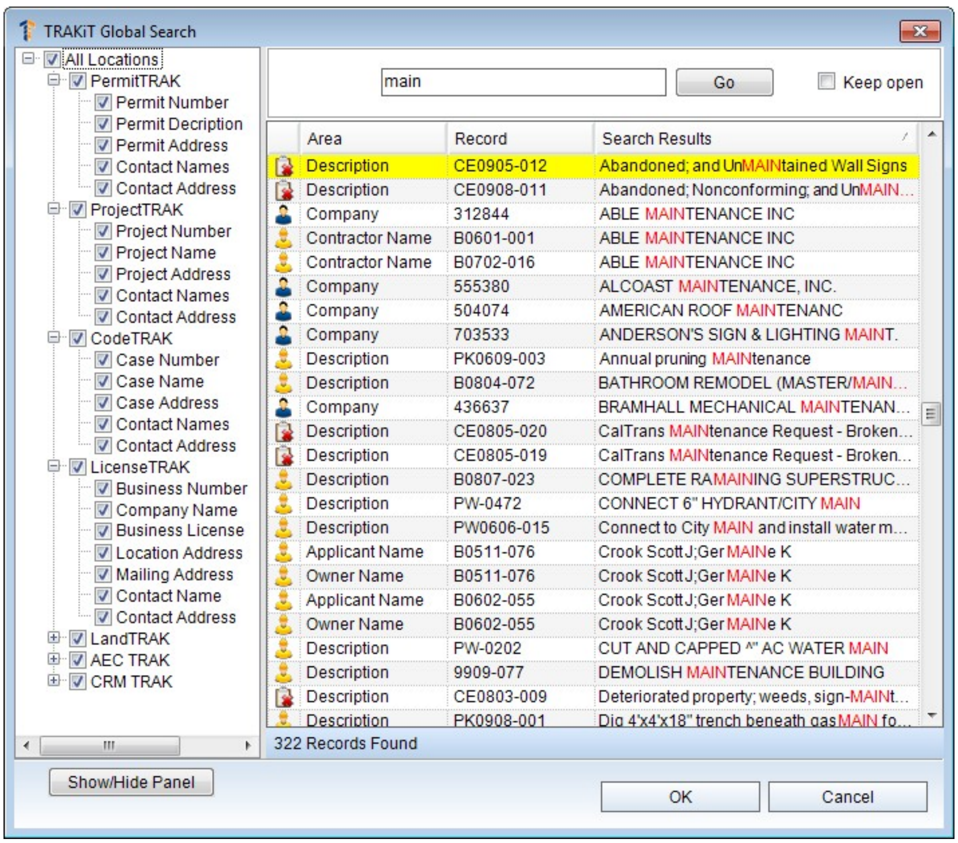
Global Search allows you to locate records by searching within specific fields and within all or specific modules. The search fields include record number, address, and contact information.

To locate record(s) using Global Search:

1. Press Ctrl+f or select Global Search from the **Tools** menu.
2. Enter your search criteria and click **Go**.

   Note: The search/scan screen wildcards (_ %) are not available in the global search.
3. Double-click a row in the grid to view a record in the application.

Tip: If you want the **Global Search** screen to remain open after selecting a record, select **Keep Open**.



Tip: To refine or limit your search, click the Show/Hide Panel button and deselect the modules or fields that you do not want searched. The default is search **All Locations**.

Using the Move Navigation Buttons

The Move buttons ( ) allow you to navigate through your search results from the main screen of a TRAKiT application.

To use the Move buttons:

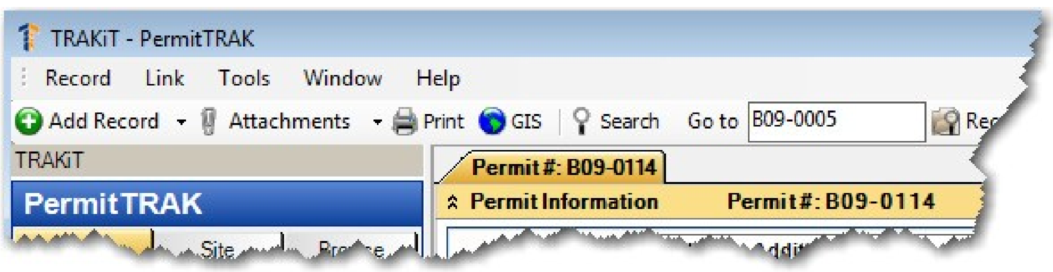
- Click the Move First button ( ) to navigate to first record in the data set.

- Click the Move Last button ( ) to navigate to last record in the data set.
- Click the Move Next button ( ) to navigate to the next record.
- Click the Move Previous button ( ) to navigate to the previous record.
- Click the Reset to Record # button ( ) to display a sequential list of records based on the current record number (i.e., permit number, project number, case number etc.). For example, if your current record is BLD10-0030 and you click **Rest to Record #**; the **Browse** tab displays a list of records in sequential order (i.e., BLD10-0029, BLD10-0030, BLD10-0031 etc.).

Using Go To

To retrieve a record using Go To:

1. Open PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LandTRAK, or LicenseTRAK.
2. Enter the permit, project, case, registration, parcel, license number.



3. Press **Enter**.

Tip: Go To locates exact matches, only. Wild card characters cannot be used with Go To.

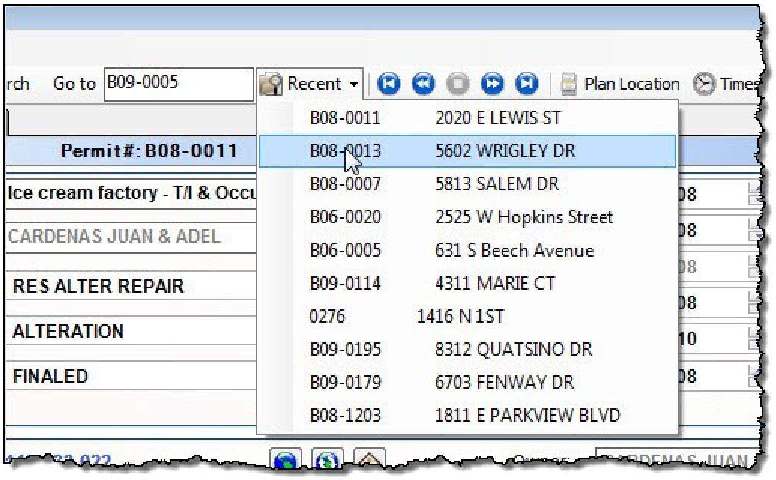
To retrieve a linked record using **Go To** on the **Link** menu:

1. Click **Link** on the menu bar.
2. Click **Go To**.
3. Select the linked record.

Using Recent

To retrieve a record using Recent:

1. Open PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LandTRAK, or LicenseTRAK.
2. Click **Recent** to display a list of up to 10 recently viewed records.



3. Select the record you wish to retrieve.

Adding Records

Overview

TRAKiT records manage information associated with various departments, including:

- Locations (LandTRAK), such as parcels, buildings, and suites;
- Activities that occur at locations, such as permits (PermitTRAK), projects (ProjectTRAK), code enforcement cases (CodeTRAK), and business licensing (LicenseTRAK);
- People who are associated with activities (AEC TRAK), such as architects, engineers, and contractors.

Just as these concepts are dependent upon one another, so can TRAKiT records be related, or linked, to each other. When creating a new TRAKiT record, consider what it is and how it is related to existing information in TRAKiT:

If you want to…	see this topic…
Create a new location	Adding LandTRAK Records
Create a new permit, project, or case record that is linked to a location	Adding a Record
Create a new permit, project, or case record	Adding Activity Records
Create a new permit or project record that is linked to an existing permit or project record	Adding a Linked Record (in Linking Permit and Project Records)
Create a new case record that is linked to an existing case record	Adding a Linked Record (in Linking Case Records)
Add a license to an existing business record (if your system setup allows multiple licenses for a single business record)	Adding a License to a Business Record
Create a new AEC TRAK record	Adding a Record in AEC TRAK
Create a new AEC TRAK record that is associated with a permit, project, case, or business record	Adding an AEC Record through the Contacts Panel
Create a record that has the same basic information as another record in PermitTRAK, ProjectTRAK, or AEC TRAK	Adding Duplicate Records

Adding LandTRAK Records

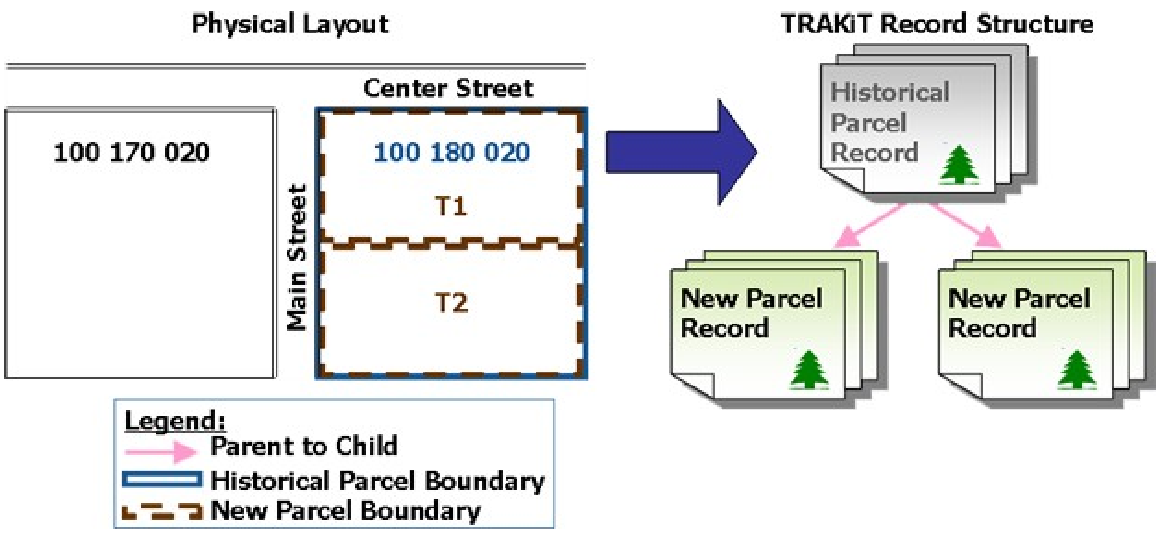
About LandTRAK Records

LandTRAK records manage information associated with locations within a municipality, including parcels, buildings on parcels, suites within buildings, historical parcels that have since been subdivided, or any combination thereof. Additionally, these records can be linked to one another in parent-child relationships.

When creating a new LandTRAK record, you must choose to either duplicate an existing parcel number (if the parcel number is not changing) or use a temporary parcel number (if the parcel number will be changing). Depending on your setup, TRAKiT may automatically generate a temporary parcel number, or you may enter it manually.

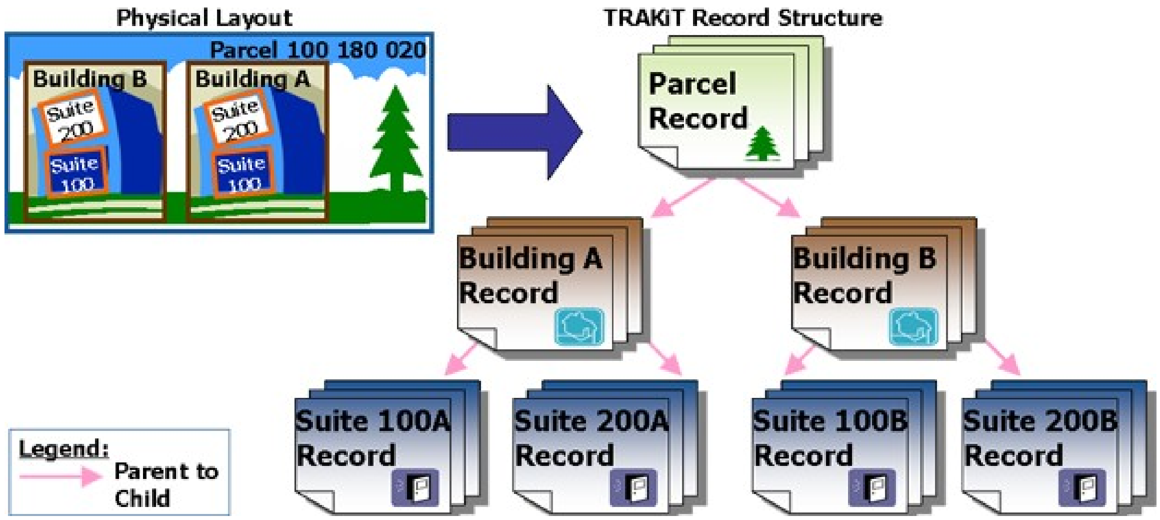
Example 1: Subdivided Parcels

For example 1, suppose you have a new subdivision that has been approved for development, and an existing parcel (Parcel 100 180 020) is being split into two parcels. You may want to retain all historical information about the original parcel, but issue permits on the new parcels. In this example, there are three potential LandTRAK records: the historical parcel and the two new parcels. The two new parcels may be created as subrecords of the original parcel, and the status of the original parcel may be set as Inactive. Also, since the parcel numbers may be changing, you may create the new parcels using temporary parcel numbers (Parcels T1 and T2).



Example 2: Parcels with Multiple Units

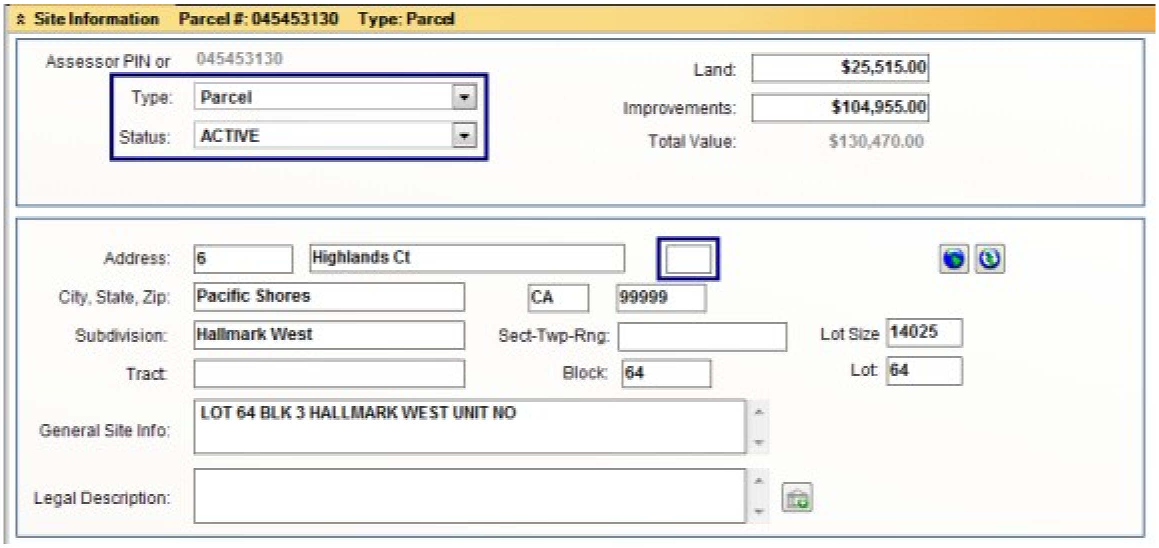
For example 2, suppose you have a parcel (Parcel 100 180 020) with two buildings (Buildings A and B) on it, and each building has two suites in it (Suites 100 and 200). In this example, there are seven potential LandTRAK records: Parcel 100 180 020, Building A, Building B, Suite 100A, Suite 200A, Suite 100B, and Suite 200B. Also, Suites 100A and 200A are subrecords (children) of Building A, Suites 100B and 200B are subrecords of Building B, and Buildings A and B are subrecords of Parcel 100 180 020. The building and suite subrecords may have the same parcel number as the main parcel record, so you may choose to duplicate the existing parcel number when creating the subrecords.



Adding a Record

To add a LandTRAK record:

1. Open LandTRAK.
2. Click **Add Record**.
3. Perform one of the following options for creating LandTRAK records:
    - To create a subsite of the current parcel with a temporary parcel number, select Sub-Site of from Create New and click New from Site APN. (In Example 1, use this option to create Parcel T1 as a subrecord of Parcel 100 180 020.)
    - To create a subsite of the current parcel with the same parcel number as the current parcel, select Sub-Site of from Create New and click Copy Current from Site APN. (In Example 2, use this option to create Building A as a subrecord of Parcel 100 180 020.)
    - To create a new record with the same parcel number as the current parcel, select Site from Create New and click Copy Current from Site APN. (In Example 2, use this option to create Building A without a link to main Parcel 100 180 020.)
    - To create a new record with a temporary parcel number, select Site from Create New and click New from Site APN. (In Example 1, use this option to create Parcel T1 without a link to historical Parcel 100 180 020.)
4. Select a type from the drop-down list, if applicable. (In Example 2, you may select **Building** for Building A.)
5. Select a Status from the drop-down list, if applicable. (In Example 1, you may select **Inactive** for the historical parcel.)
6. Enter a unit number in the address block, if applicable. (In Example 2, you may enter **100A** for Suite 100A.

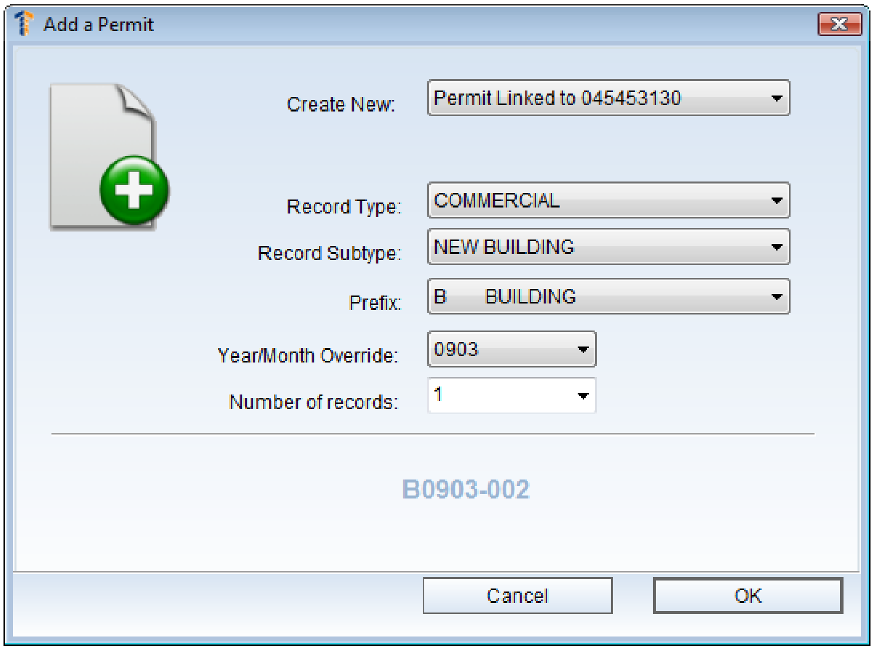


Adding Activity Records

Activity records (permits, projects, cases, licenses, issues, and contractor) can be created with or without a link to a LandTRAK record.

To create an activity record linked to a LandTRAK record:

1. Locate the LandTRAK record
2. Click **Add Record**.
3. Select the type of record (e.g., permit, project, case etc.). The list is based on the module and your user privileges.
4. Select a type.
5. Select a subtype, if required.
6. Select a prefix, if required for your configuration.
7. (Optional) Select the number of records you want to create from the list (maximum of 25).
8. Click **OK**.



Tip: Depending on your setup, you may use a year/month code in your record numbering format. For example, permit numbers for building permits entered in December 2008 may begin with B0812, where B is the prefix for the building, 08 is the year code, and 12 is the month code. This option gives you a grace period to account for interruptions such as vacations and holidays. If you are using the year and month in your record numbering format, this option is available at the beginning and end of each month. If you are using the year only, this option is available at the beginning and end of each year. If applicable, select the year/month in which you want to track the record.

To create an activity record not linked to a LandTRAK record:

1. From the module main screen (e.g., PermitTRAK).
2. Click **Add Record**.
3. Select a type.
4. Select a subtype, if required.
5. Select a prefix. (Note: Not required for all configurations)
6. (Optional) Select the number of records you want to create from the list (maximum of 25).
7. Click **OK**.

Note: The site information on the activity record is blank. This record can be linked to a LandTRAK record at a future date.

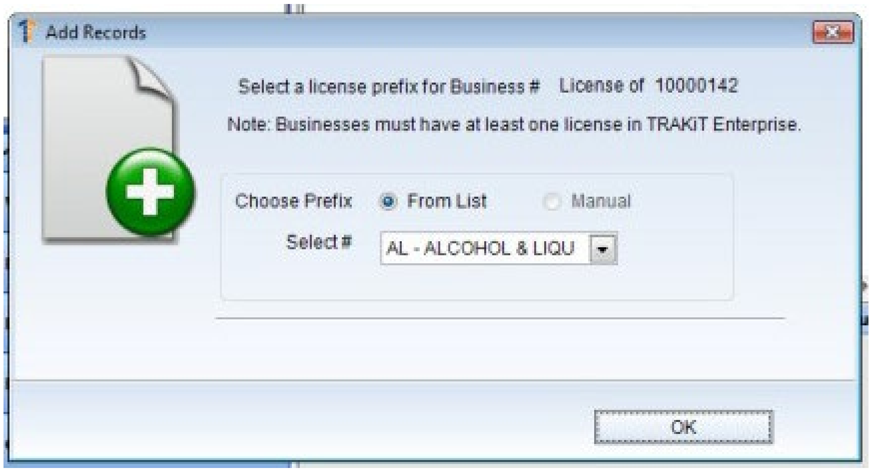
Adding a License to a Business Record

Tip: This procedure only applies if your system setup allows multiple licenses for a single business record.

To add a license to an existing business record:

1. Find the business record in LicenseTRAK.
2. From the **License** panel **Functions** menu, click **Add License**.

3. Depending on your setup, either select a prefix from a list or enter it manually.

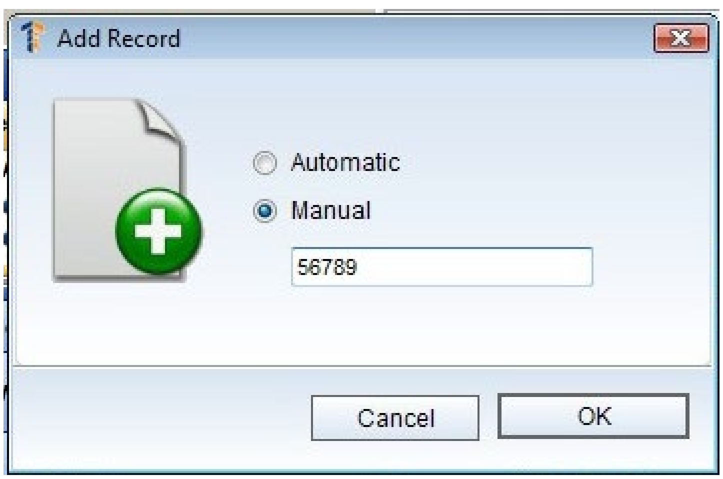


Adding a Record in AEC TRAK

Tip: You can also create an AEC record through the Contacts panel in other applications.

To create a record in AEC TRAK:

1. From the AEC TRAK, click **Add Record**.
2. Depending on your setup, at the prompt, enter a unique numerical identifier for the AEC registration number, and click **OK**. An AEC registration number is automatically assigned.



Tip: CentralSquare recommends that the contractor's state registration number is used as the AEC registration number whenever available. Use Automatic for contacts that do not have a state registration number (e.g., architects). TRAKiT assigns a unique registration number to the contact.

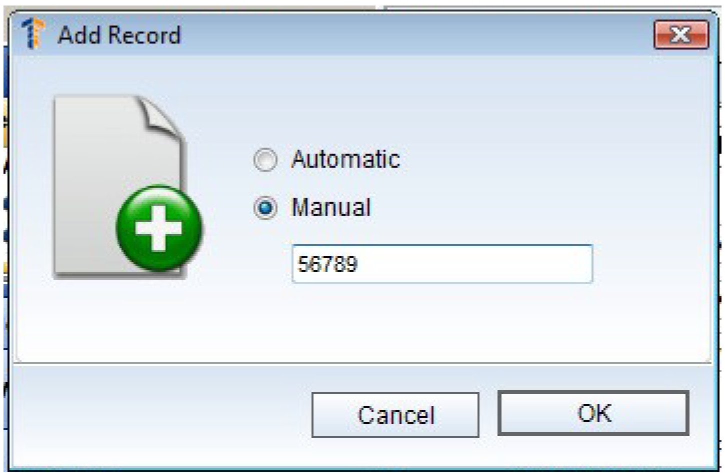
Tip: AEC TRAK records contain both an interactive voice response (IVR) PIN and password. The IVR PIN is used as the password for the IVR system. The **Password** field is used to log in to eTRAKiT. When you add or update the IVR PIN, TRAKiT automatically sets the password field to the value entered into the **IVR PIN #** field.

Adding an AEC Record through the Contacts Panel

Tip: Creating an AEC record through the **Contacts** panel establishes an association between the AEC record and the permit, project, or case record.

To create an AEC record through the **Contacts** panel:

1. Open the **Contacts Panel** in PermitTRAK, ProjectTRAK, CodeTRAK, or LicenseTRAK.
2. Click the contact in the grid you are adding to AEC TRAK.
3. Enter the contact details in the information fields.
4. Either right-click on the contact or click **Add to AEC TRAK** from the **Utilities** menu.
5. Depending on your setup, at the prompt, an AEC registration number is automatically assigned. Or manually enter a unique numerical identifier for the AEC registration number, and click **OK**.



6. Click **OK**.
7. Click **OK** on the **Add to AEC TRAK** confirmation dialog box.

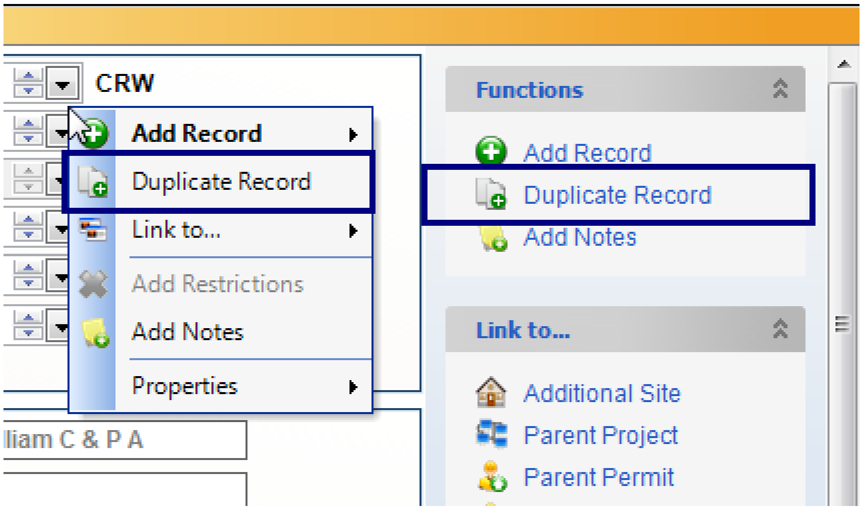
Adding Duplicate Records

You can add a duplicate record—a record that has the same basic information as another record—in PermitTRAK, ProjectTRAK, CodeTRAK and AEC TRAK.

Tip: Duplicate records work well with the Model prefix in PermitTRAK for floor plans that have been reviewed and approved, and the contractor intends on building more than one. Use the Model prefix to create and track the basic information, plan reviews, and approvals for the first permit, and then create duplicates of the model permit for each subsequent permit with the same floor plan.

To add a duplicate record:

1. Open PermitTRAK, ProjectTRAK, CodeTRAK, or AEC TRAK.
2. Click **Duplicate Record** on the Functions menu or right-click in the **Information** panel and select **Duplicate Record**.

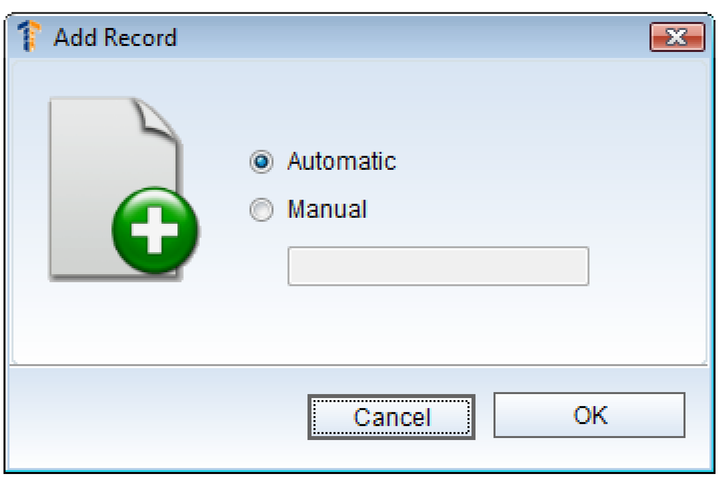


3. Select a prefix.
4. Select a year/month code, if applicable.
5. (Optional) Select how many records you want to add from the drop-down list (maximum of 25).
6. Click **OK**.

Tip: Depending on your setup, you may use a year/month code in your record numbering format. For example, permit numbers for building permits entered in December 2017 may begin with B1712, where B is the prefix for building, 17 is the year code, and 12 is the month code. This option gives you a grace period to account for such interruptions as vacations and holidays. If you are using the year and month in your record numbering format, this option is available at the beginning and end of each month. If you are using the year only, this option is available at the beginning and end of each year. If applicable, select the year/month in which you wish to track the record.

In AEC TRAK:

1. Enter a unique numerical identifier for the AEC registration number, and click **OK**. Or, an AEC registration number is automatically assigned.



2. Select the information you wish to copy to the duplicate record.

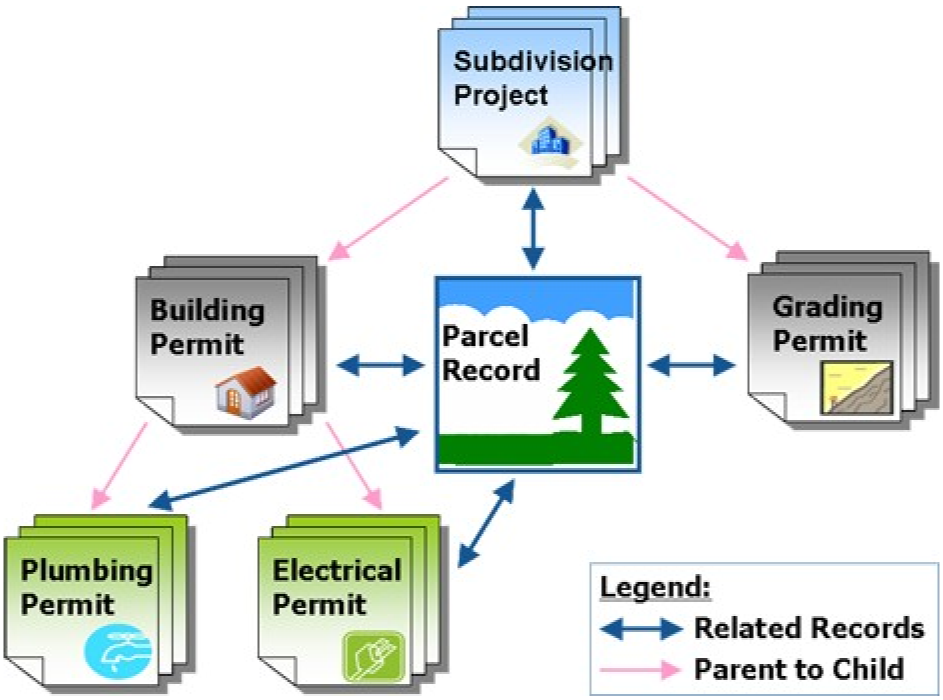
3. Click **OK**.
4. If you chose the **Selected Contacts** or **Selected UDF fields** option, click **OK** for each contact or user-defined field you wish to copy.

Linking Records

Overview

TRAKiT records can be linked together in a number of ways:

- Permit, project, case, business, parcel, and CRM records can be linked to a LandTRAK record. Linked records can be accessed directly through the Tree or Site tabs in the Navigation panel.
- Permit, project, case, and property records can be linked in parent-child relationships. For example, a building permit may have a subpermit for electrical work. In this example, the main building permit is the parent record and the electrical permit is the child record.

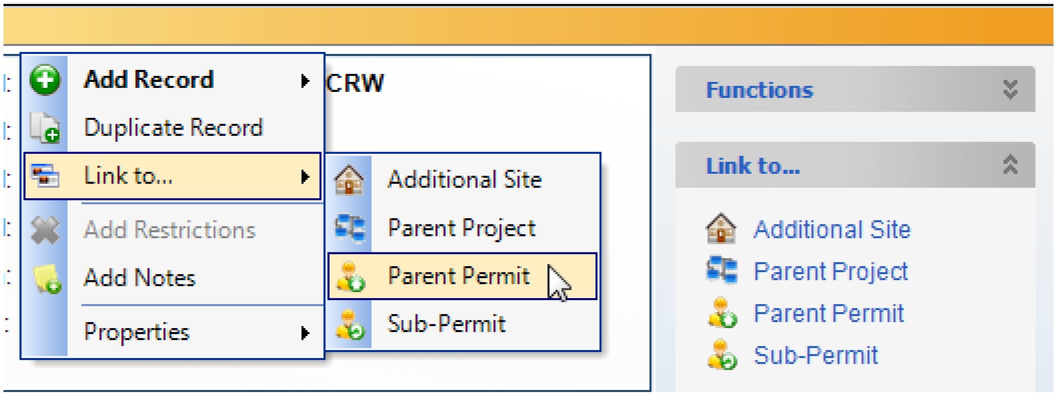


- Case records can be cross-linked to one another.
- An association can be established between AEC records and permit, project, and case records that allows you to navigate to related permits or pay fees on related records directly from AEC TRAK.

Linking and Unlinking Records

To link records:

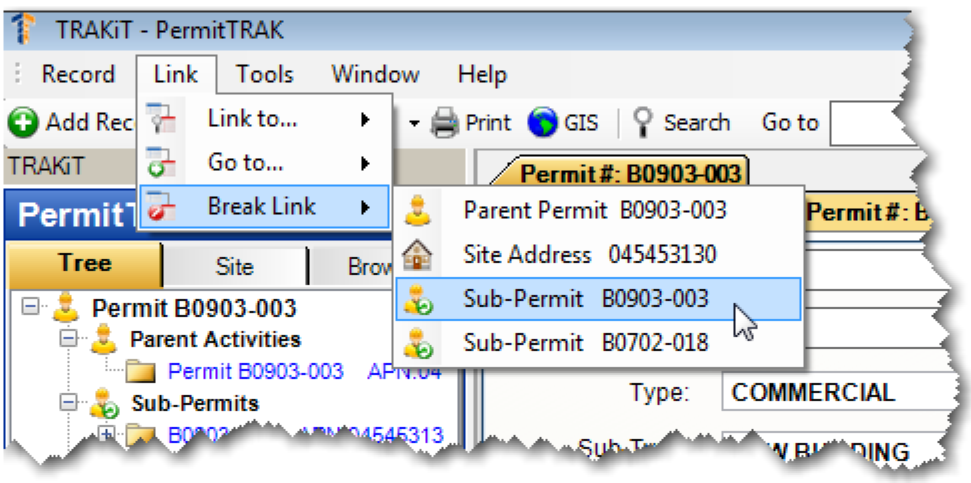
1. Locate a record that you want to link.
2. Select the record relationship from either the **Link to** menu or by right-clicking in the record's information panel.



3. Locate the record using the **Search** screen.
4. Double-click the record in the results grid.

To Unlink Records:

1. Locate the record.
2. Select the **Link** menu from the toolbar.
3. Select the **Break link** submenu.
4. Select the record to unlink.

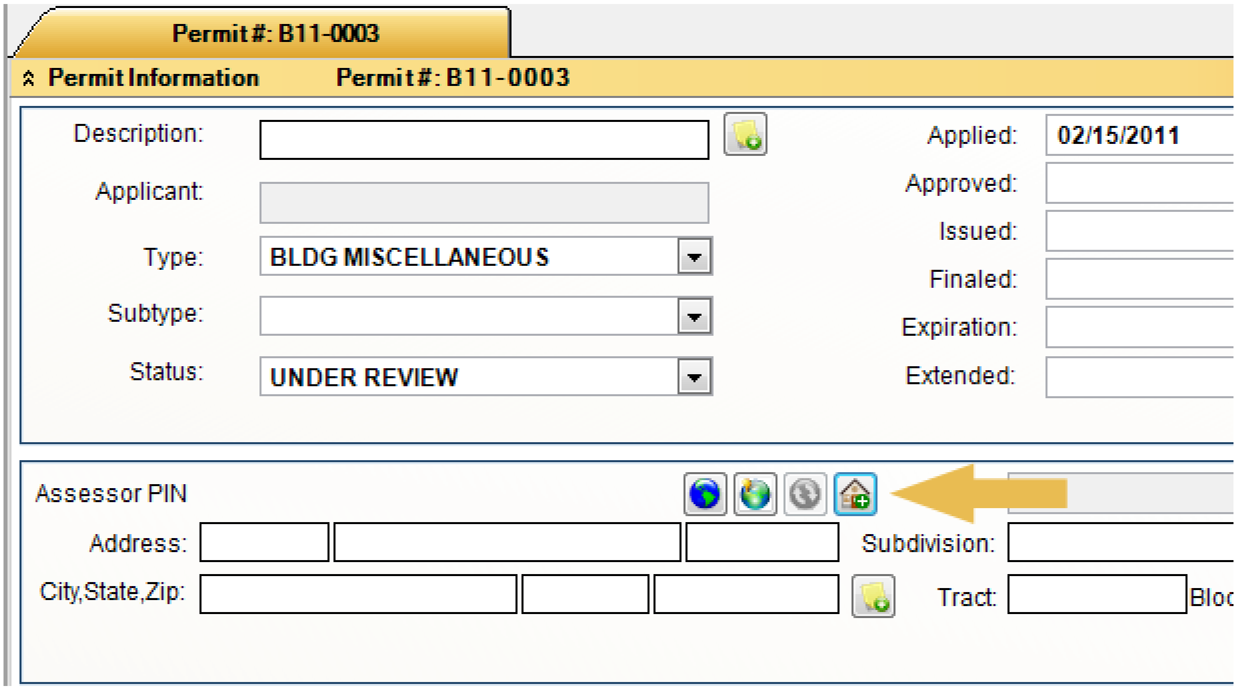


Linking a Record to a LandTRAK Record

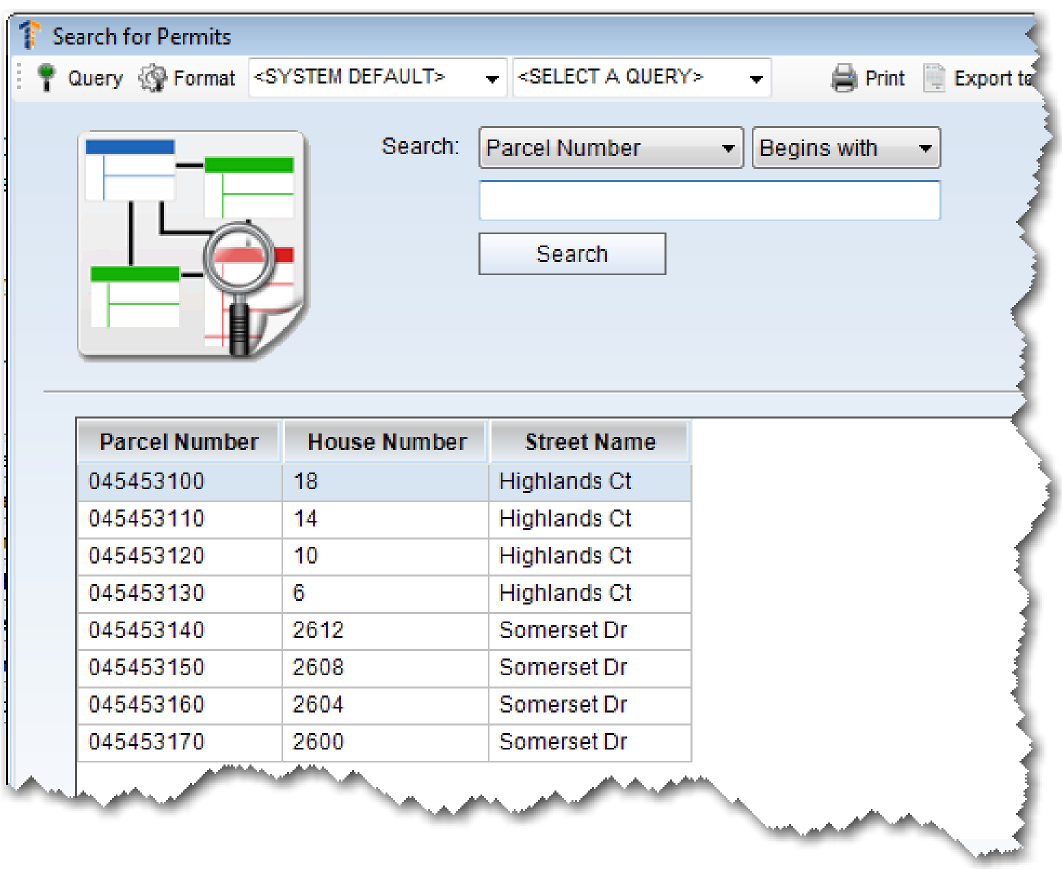
Tip: Adding a permit, project, or case through LandTRAK automatically establishes a link between the LandTRAK record and the PermitTRAK, ProjectTRAK, or CodeTRAK record.

To link a permit, project, case, issue, or business record to a LandTRAK record:

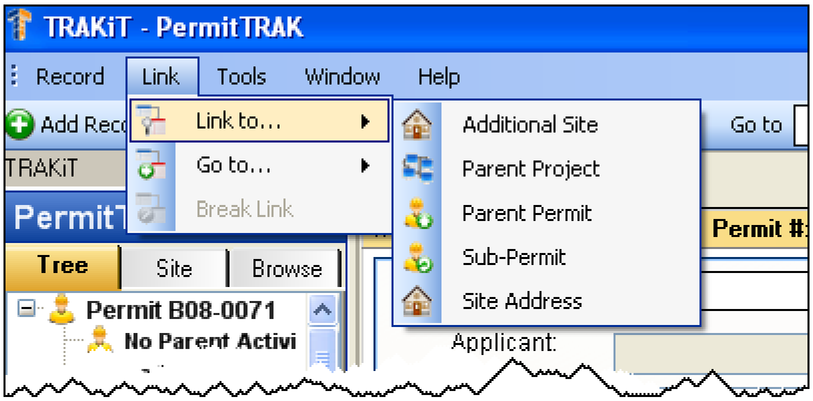
1. Locate the record in PermitTRAK, ProjectTRAK, CodeTRAK, or LicenseTRAK.
2. Click the Link to Site Address () icon.



3. Locate the LandTRAK record using the **Search** screen.



4. Double-click a parcel in the results grid to automatically populate the site information.
5. (Optional) To link additional parcel records to a single permit, project or case, click on the **Link to** menu, select **Additional Site** to link to the record:
   a. Click **Add a Parcel**.
   b. Locate the parcel in LandTRAK using the **Find** screen.
   c. Double-click a parcel in the results grid to select it.
   d. Repeat steps a–c until all relevant records are added.



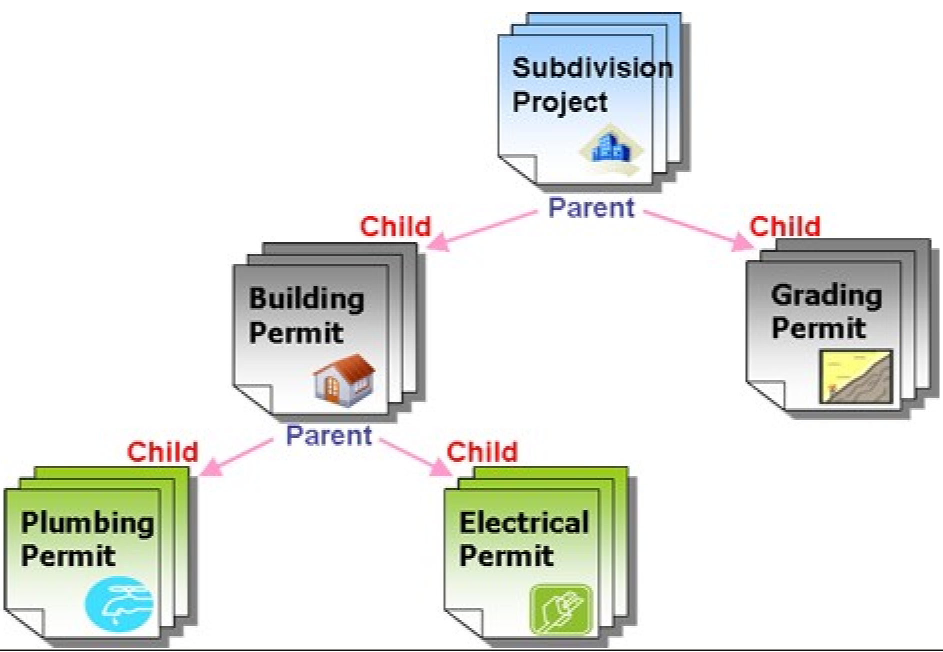
6. Click **Accept**.

Tip: Records that are linked to a LandTRAK record are listed on the Site tab (navigation pane).

Tip: Refresh ( ) updates the site information and owner information from LandTRAK.

Linking Records

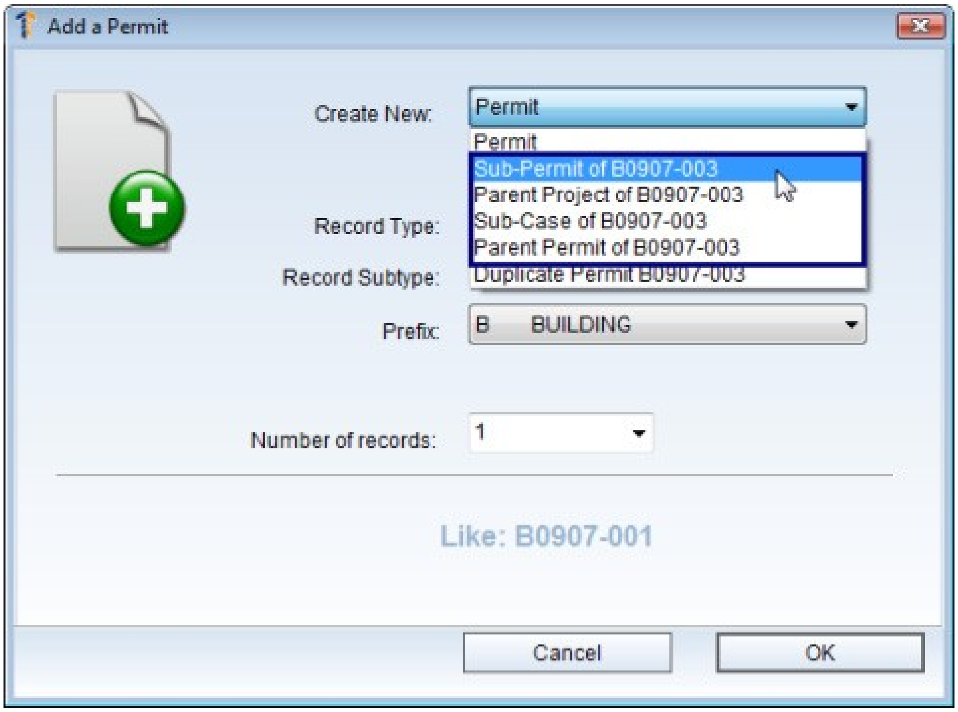
Records can be linked together in a parent-child relationship. There are two ways to establish this link: add a new linked record or link existing records.



Adding a Linked Record

To add a new linked record:

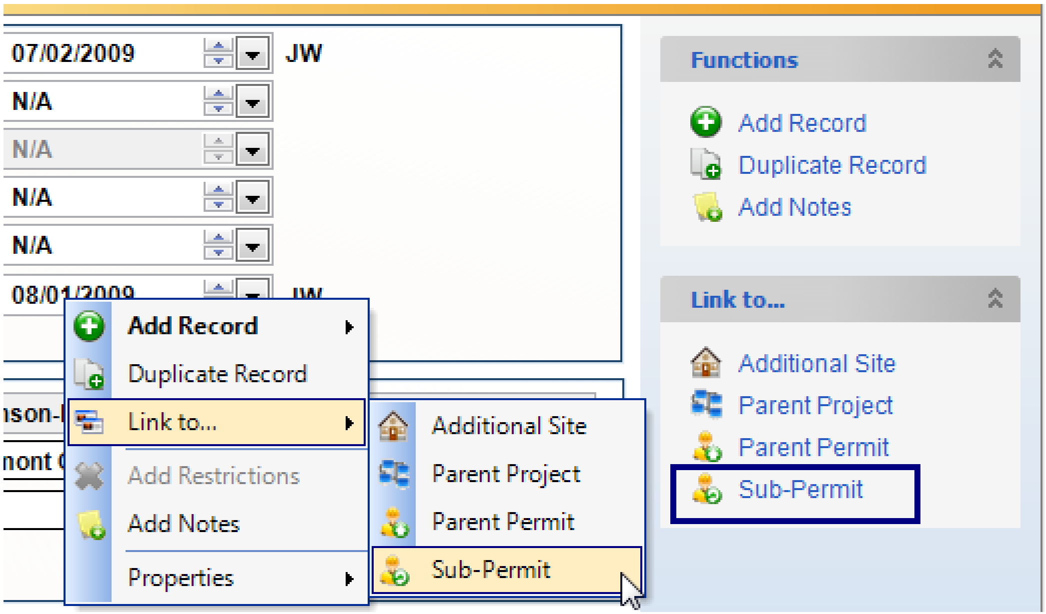
1. Locate the existing record.
2. Click **Add Record**.
3. Select **Sub-** or **Parent** from the **Create New** field.



Linking Existing Records

To link an existing record to another record:

1. Locate the record.
2. Right-click or select the type of record to link from the **Link To** menu.



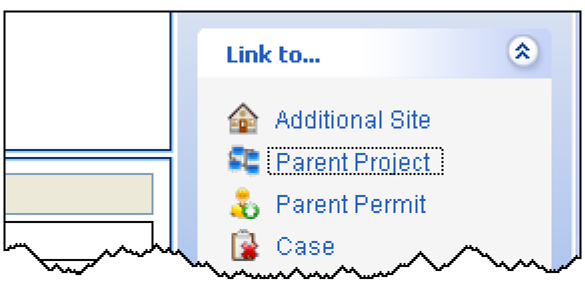
3. Locate the record using the **Search** screen.
4. Double-click a record in the results grid.

Linking Project and Case Records

Projects and cases can be linked together in a parent-child relationship.

To link a case to a parent project:

1. Locate the case in CodeTRAK.
2. Click **Parent Project** link.



3. Locate the ProjectTRAK record using the **Search** screen.
4. Double-click a record in the results grid.

Tips:

- To delete a link, highlight the project number and press the Delete key.
- Click **Go** to navigate directly to a linked record.

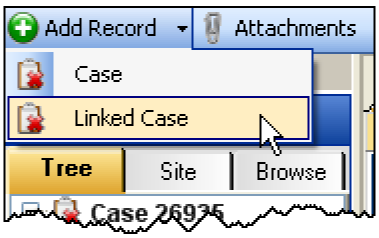
Linking Case Records

Case records can be cross-linked to one another.

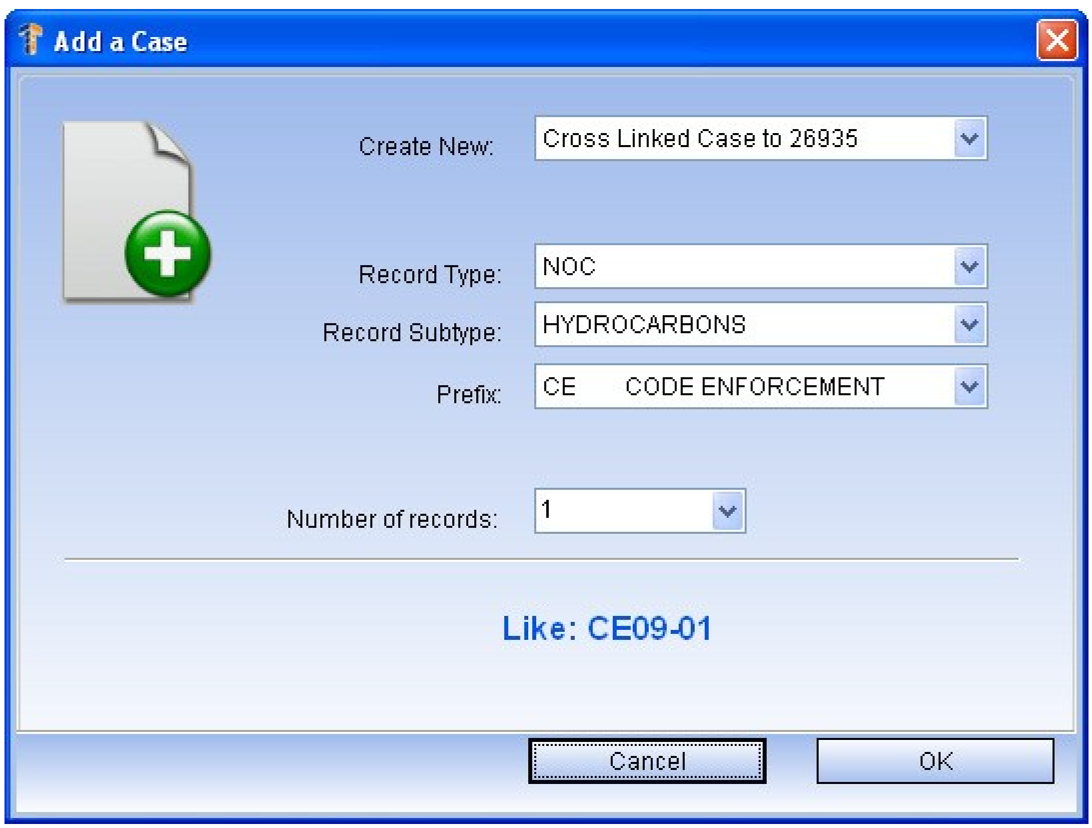
Adding a Linked Record

To add a case record that is linked to an existing case record:

1. Locate the existing record in CodeTRAK.
2. Click **Add Record**.
3. Select **Linked Case**.



4. Add the linked case as you would add a new record.

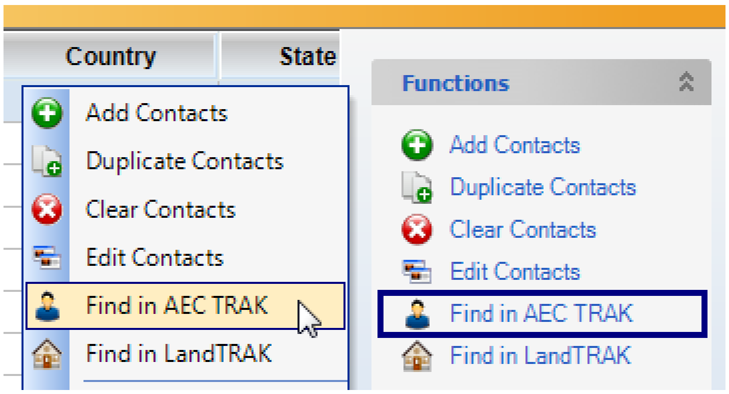


Associating Records with AEC Records

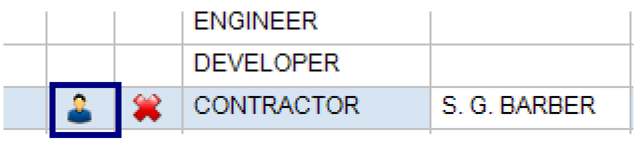
Tip: Associations between AEC records and permit, project, case and license records allow you to navigate to related permits or pay fees on related records directly from AEC TRAK. However, in order to preserve historical information, contact information is not updated automatically. Adding an AEC record through the Contacts screen automatically makes an association.

To associate a permit, project, or case record with an AEC record:

1. Locate the record in PermitTRAK, ProjectTRAK, or CodeTRAK.
2. Open the **Contacts** panel.
3. Add the AEC contact in one of two ways:
   - Right-click or click **Find in AEC TRAK** on the **Functions** menu.



   - Use the direct lookup function.
4. Associated records will display the AEC TRAK icon under the link column.



Locking Records

Overview

TRAKiT has the ability to lock LandTRAK records. Record locking allows you to freeze activity for a property that has an outstanding issue on a permit, project, or case record.

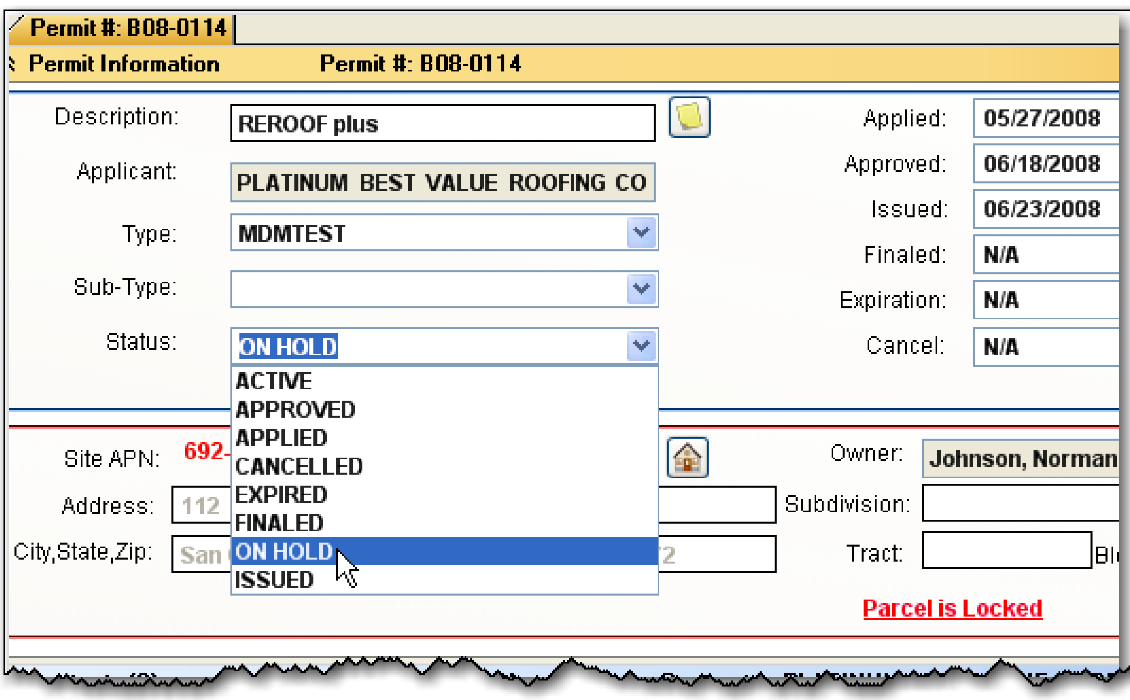
When a LandTRAK record is locked, no records can be created from or linked to that property and a red flag appears on the property record and on all linked permit, project, and case records.

Locking a Record through an Activity

Your agency may choose to lock a LandTRAK record when there is an outstanding issue on a permit, project, or case that is linked to the property. Depending on your setup, an outstanding issue is identified by certain status codes in PermitTRAK, ProjectTRAK, and CodeTRAK. For example, your agency may choose to lock a property that is in violation of a code (CodeTRAK status of Non-compliance). When a permit, project, or case record is set to one of these record locking status codes, the property is locked by the activity.

To lock a property record through an activity:

1. Locate the permit, project, or case record with an outstanding issue in PermitTRAK, ProjectTRAK, or CodeTRAK.
2. Ensure that the record is linked to LandTRAK.
3. Select a lock status (as defined by the System Administrator) from the drop-down list.

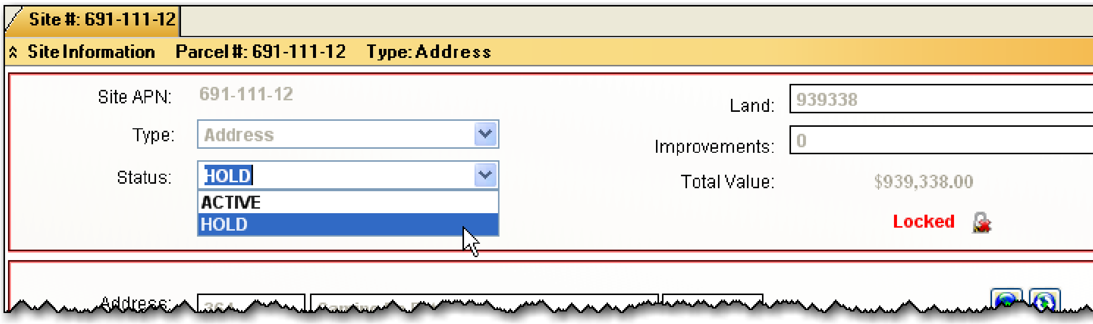


4. Click CLOSE. The linked LandTRAK record is set to **Parcel is Locked** and a red flag appears on the LandTRAK record and on all records linked to the property.

Locking a Record through LandTRAK

To lock a property record manually (through LandTRAK):

1. Locate the record in LandTRAK.
2. Select a lock status (as defined by the System Administrator) from the drop-down list.



3. Click in any other field. The text appears red on the LandTRAK record and on all system records linked to the property.

Tip:

- If you lock a record manually (through LandTRAK), TRAKiT lists the record as being locked by status.
- Only system administrators or users with the CAN UNLOCK A LOCKED PARCEL privilege can unlock a record that is locked through LandTRAK.

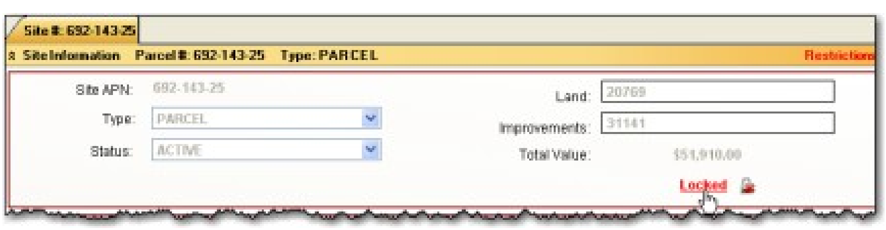
Viewing Locking Information

When a LandTRAK record is locked, the text appears red on the property record and on all linked permit, project, and case records.

To view locking information on a LandTRAK record or from a linked PermitTRAK, ProjectTRAK, or CodeTRAK record:

1. Locate the record in LandTRAK, PermitTRAK, ProjectTRAK, or CodeTRAK.
2. Click **Locked**.
3. If the property record is locked by an activity, a list appears of the permits, projects, or cases that have outstanding issues.

   If the record is locked through LandTRAK (manually), the record is listed as being locked by status.



Unlocking Records

To unlock a LandTRAK record:

1. Locate the record in LandTRAK.
2. Click the down arrow next to the **Status** field.
3. (System administrators and users with the Can Unlock a Locked Parcel privilege only) If the record is locked by status, click **Yes** and then select a nonlocking status (as defined by the System Administrator) from the drop-down list.

   If the record is locked by a permit, project, or case activity, click **No** and continue to step 4.

4. If the record is locked by a permit, project, or case activity, resolve the outstanding issue and update the status of the PermitTRAK, ProjectTRAK, or CodeTRAK record.

Tips:

- Although it is possible for system administrators to override a lock that is set by a permit, project, or case activity, it is not recommended. To ensure data integrity, a record locked by an activity should be unlocked by resolving the outstanding issue (step 4).
- Only system administrators or users with the Can Unlock a Locked Parcel privilege can unlock records that are listed as being locked by an unknown activity (locked manually through LandTRAK).

Contacts

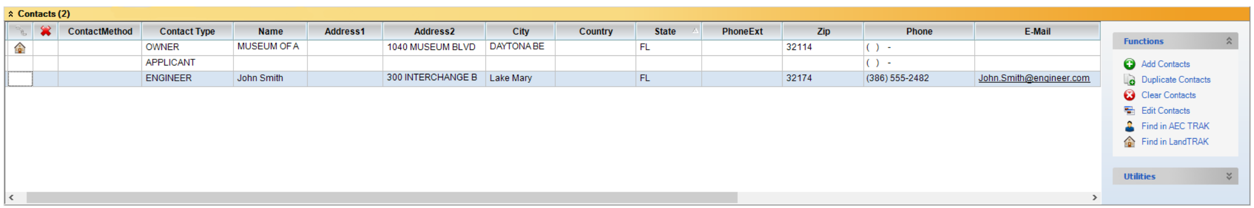
Overview

The Contacts pane stores the contact information of individuals or companies associated with a record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK.

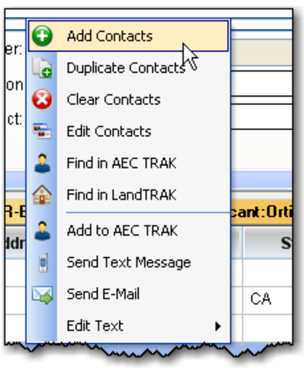
Adding a Contact

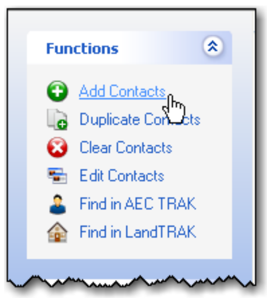
To add a contact to a PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK record:

1. Open the **Contacts** screen.

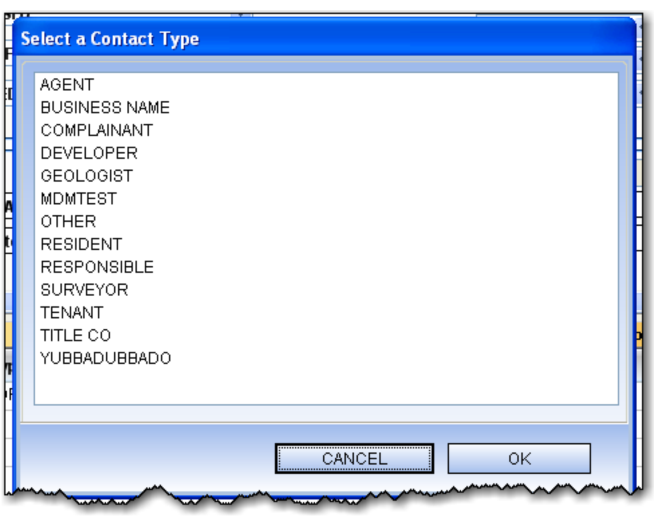


2. Right-click in the Contacts table list and select Add Contacts. Or in the Functions menu click **Add Contacts**.





3. Select a contact type
4. Click **OK**.



5. Double-click the contact type.
6. Enter the contact information in one of the following ways:
    - Use direct lookup to add a record from AEC TRAK.
    - Use **Find in AEC TRAK** or **Find in LandTRAK** to add a record.
    - Copy the information from another contact.
    - Enter the information manually.

Tip: You can add a record in AEC TRAK directly from the **Contacts** panel if you are entering a new contact.

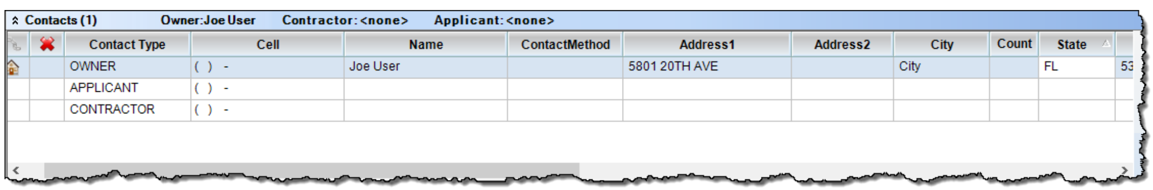
Using Direct Lookup

Tip: This feature must be enabled by a system administrator.

Direct lookup allows you to add a contact from AEC TRAK to a record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK.

To use direct lookup:

1. Open the **Contacts** screen.



2. Click the **Name** field of the contact you are adding.
3. Type the first few letters of the contact name in the **Name** field, and press the Tab key.
4. Select the correct contact from the list of AEC records.

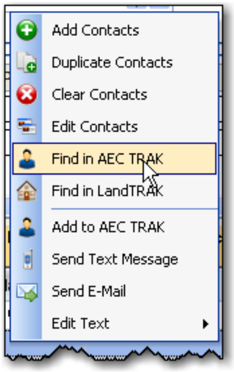
Tip: Using direct lookup establishes an association between the permit, project, or case record and the AEC TRAK record.

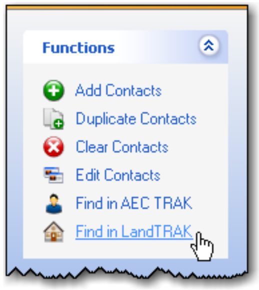
Using Find in AEC or LandTRAK

Find in allows you to add an AEC TRAK record or an owner in LandTRAK as a contact in a PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK record.

To use Find in:

1. Open the **Contacts** screen.
2. Right-click in the **Contacts** table list and select **Find in AEC TRAK** or **Find in LandTRAK**. Or in the **Functions** menu click **Find in AEC TRAK** or **Find in LandTRAK**.





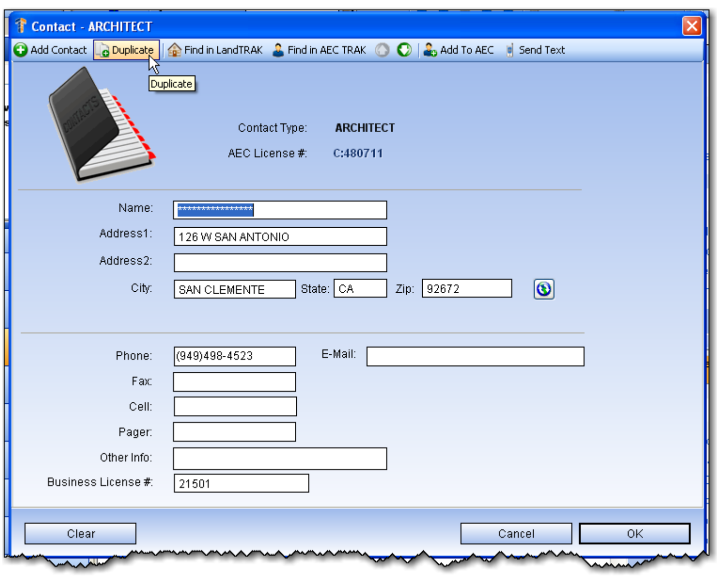
3. Locate the AEC TRAK record or LandTRAK owner using the **Search** screen.
4. Double-click a record in the results grid.

Tip: Using **Lookup From** establishes an association between the permit, project, or case record and the AEC TRAK record.

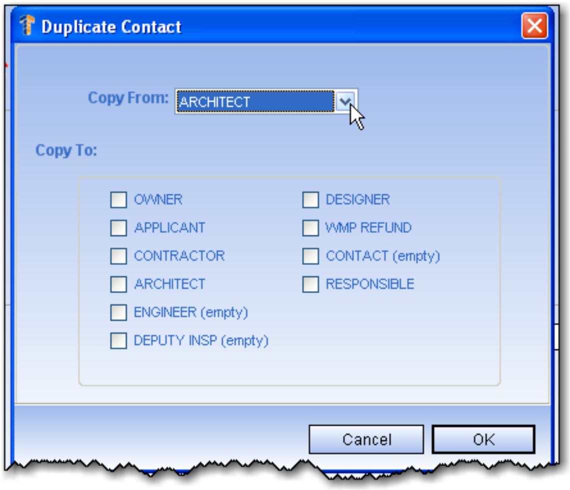
Duplicating Contact Information

To copy information from one contact to one or more contacts in the same PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK record:

1. Open the **Contacts** screen.
2. Click any contact type.
3. Click **Duplicate**.



4. Select the contact label to copy from.



5. Select the contact(s) to copy to.
6. Click **OK**.

Using Association Icons

Association Icons allow you to open linked or associated records in AEC TRAK and LandTRAK from the Contacts screen in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK.

To use the Association Icons:

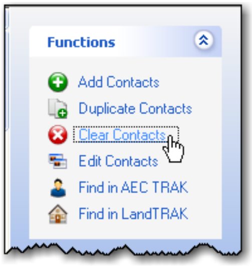
1. Open the **Contacts** screen.
2. Select a contact type.
3. Double-click one of the following options:
   - Click the AEC TRAK icon ( ) to open the associated AEC TRAK record.
   - Click the LandTRAK icon ( ) to open the associated LandTRAK record.

Clearing a Contact

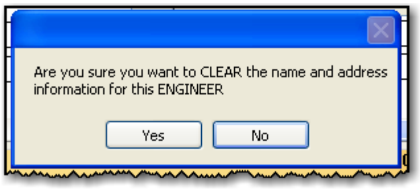
Clearing a contact removes all of the information from the selected contact.

To clear a contact:

1. Open the **Contacts** pane.
2. Select the contact you are clear.
3. Right-click in the **Contacts** table list and select **Clear Contacts**. Or in the **Functions** menu click **Clear Contacts**.



4. Click **Yes** to confirm the deletion.

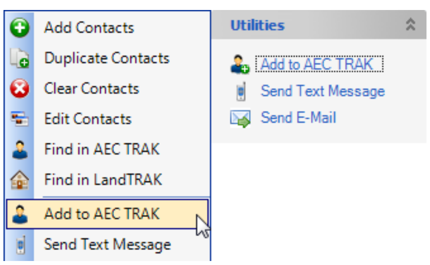


Add to AEC TRAK

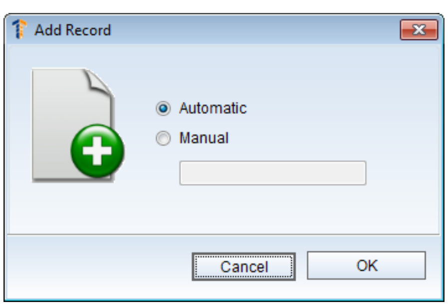
Add to AEC TRAK provides the ability to add a new AEC TRAK record from the information entered into a contact record.

To add a new AEC TRAK record from a contact record:

1. Open the **Contacts** pane.
2. Select the contact you want to add the AEC TRAK record from.
3. Right-click in the **Contacts** table list and select **Add to AEC TRAK**. Or in the **Utilities** menu click **Add to AEC TRAK**.



4. Select the method used to create the record number (automatic or manual).



Tip: Automatic is used when you want TRAKiT to generate a record number. Manual is used when you want to enter a registration number assigned by another agency (e.g., state contractor registration number).

5. Click **OK**.

Reviews

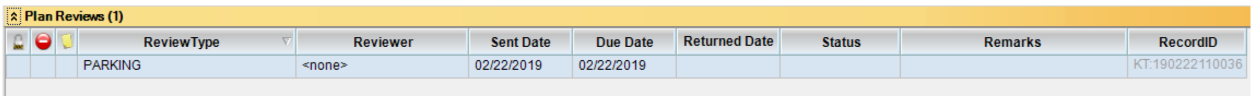
Overview

TRAKiT can track reviews associated with records in PermitTRAK, ProjectTRAK, and LicenseTRAK.

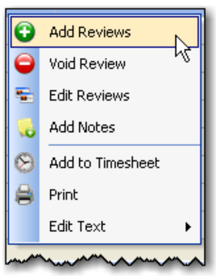
Adding Reviews

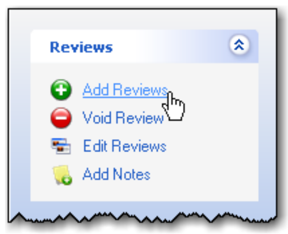
To add a review to a record in PermitTRAK, ProjectTRAK, or LicenseTRAK:

1. Open the **Reviews** screen.

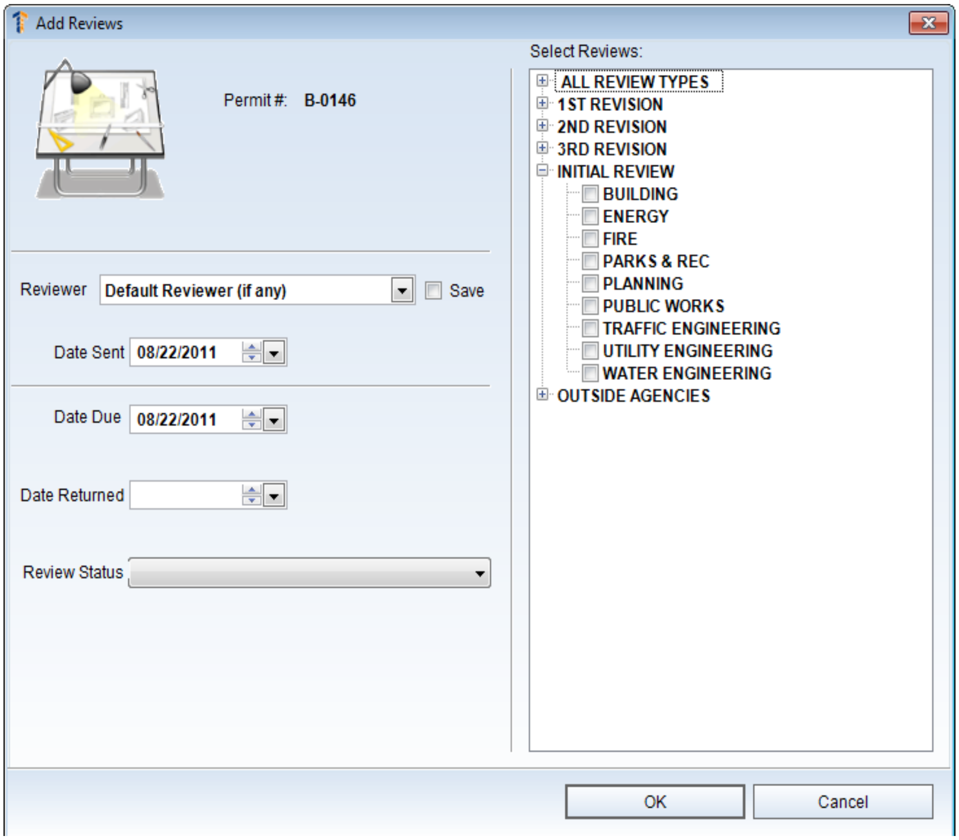


2. Right-click in the **Plan Reviews** table list and select **Add Reviews**. Or in the **Reviews** menu click **Add Reviews**.





3. Select one or more reviews on the right side of the screen.
   - Reviewer—Select the staff member conducting the review from the drop-down list.
   - Date Sent—Enter the date the review items are sent to the reviewer.
   - Date Due—Enter the date the review items are due back.
   - Review Status—Enter the status of the review.



Tip: The date fields default to the current date unless another date is entered or **No Specified Date** is selected. Depending on your setup, the due date may be calculated automatically.

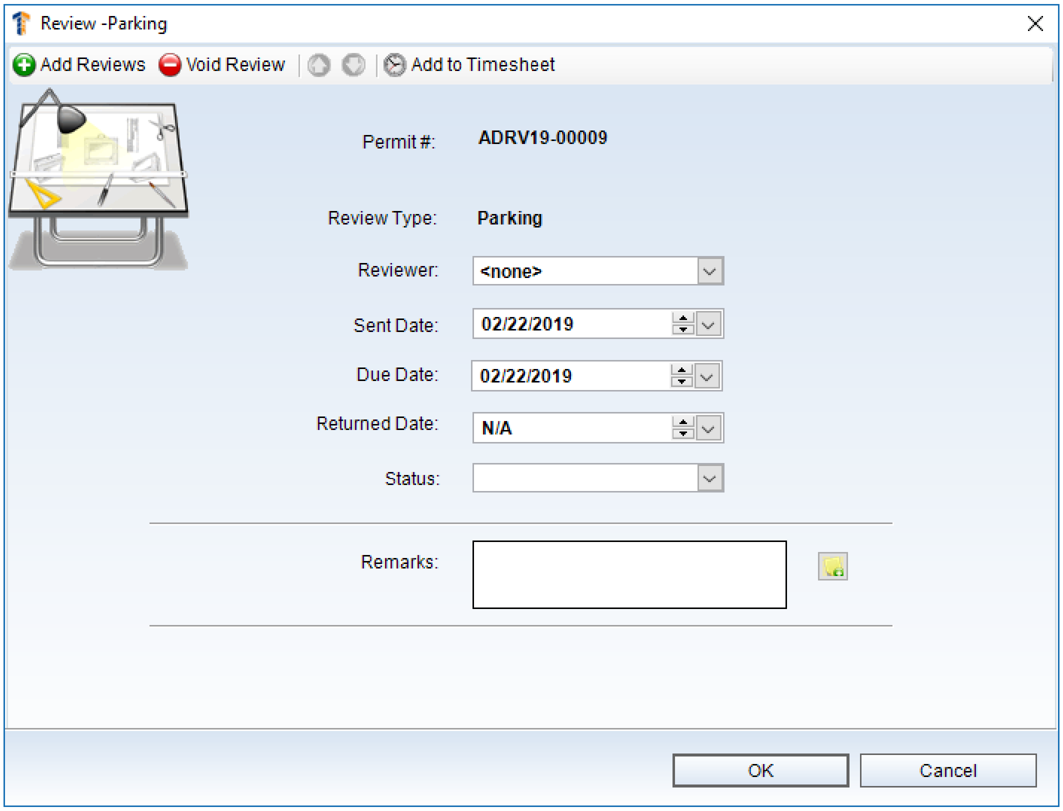
Tip: Select **Save** to retain (remember) the selected reviewer.

4. Click **OK**.

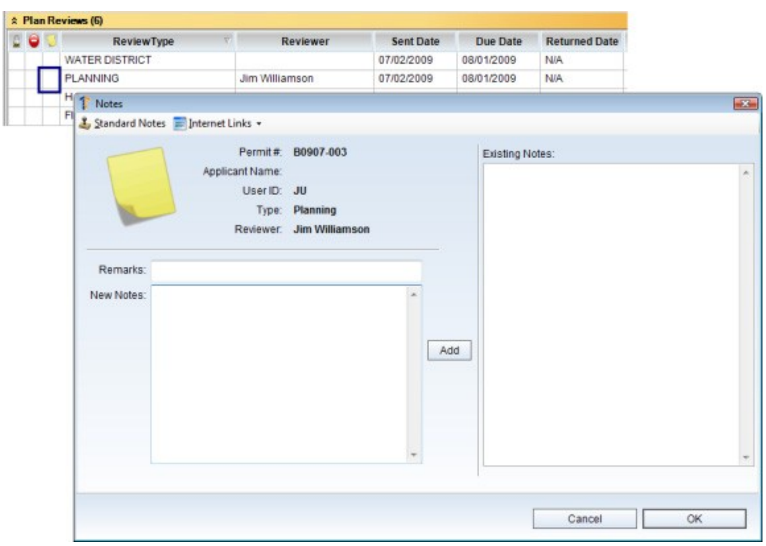
Editing Reviews

To edit reviews on a single record in PermitTRAK, ProjectTRAK, or LicenseTRAK:

1. Open the **Reviews** panel.
2. Enter the review details for each review you wish to edit.
3. Double-clicking on the **Review Type** will open the Card View for the selected review.



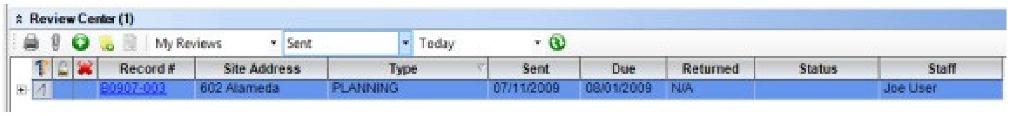
4. Click the **Notes** icon to enter unique or standard notes.



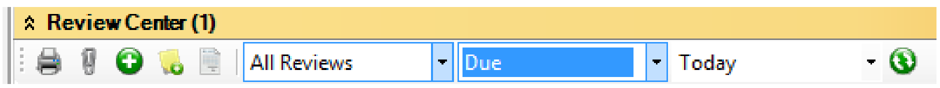
Editing Reviews in Review Center

To edit reviews for multiple records from a single screen:

1. Open the **Review Center** in WorkSpace.
2. By default, all reviews sent today for the logged in user are displayed.



3. Review results are recorded by selecting the returned date, status and recording any notes or remarks from the appropriate drop-downs or screen.
4. Other reviews are displayed by changing the search parameters (Reviewer; sent, due, or returned date; or the date range). After setting your parameters click the Refresh button ( ).



5. To retrieve reviews for specific reviewers, select **Selected Staff** from the first drop-down. Select sent, due, or returned date from the second drop-down and set a date range from the third drop-down. Click the Refresh button and select one or more names from the list of reviewers.
6. Sort order is changed by clicking any of the Review Center column headings.

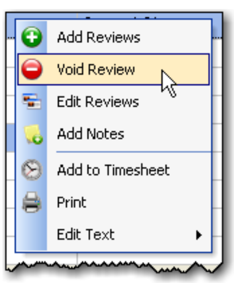
Tip: Clicking the plus sign next to the review displays all reviews associated with the record.

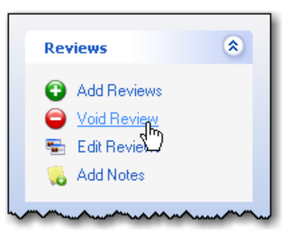
Voiding and Deleting Reviews

Users can void reviews, not delete them. Only system administrators or users with the Can Delete Reviews privilege can delete reviews.

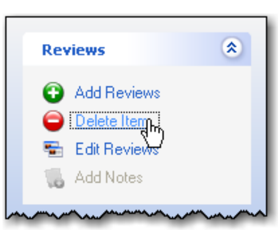
To void/delete reviews:

1. Open the **Reviews** screen.
2. In the **Plan Reviews** table list select the review to be voided/deleted.
3. On the selected review, right-click and select **Void Review**. Or in the **Reviews** functions menu click **Void Review**.





4. Click **Yes**.
5. To delete the voided review (requires a user privilege), click **Delete Item**.



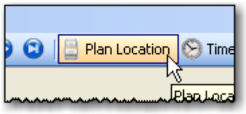
6. Click **Yes** to confirm the deletion.

Plan Location

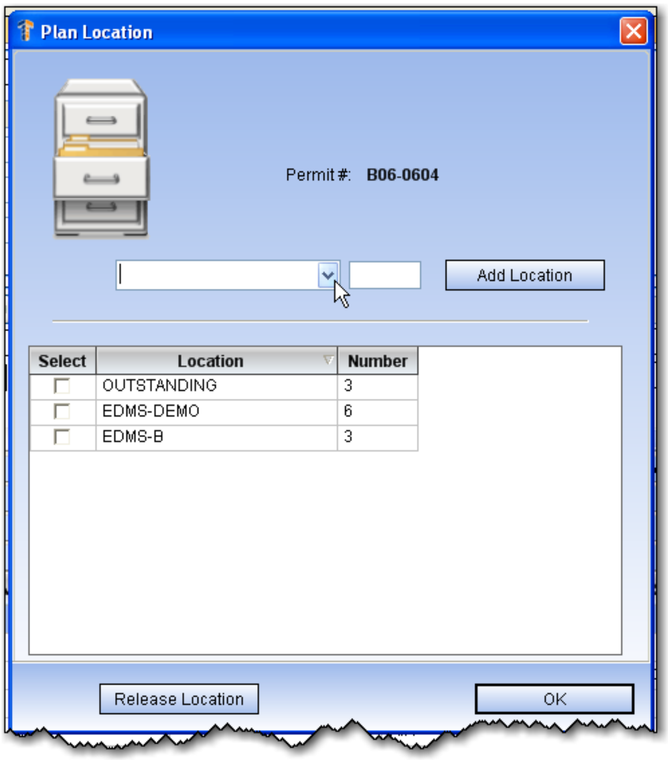
Plan Location manages and tracks the physical location of all plan items that are associated with a record in PermitTRAK, ProjectTRAK, or CodeTRAK.

To use Plan Location:

1. On the menu bar click **Plan Location** to open the **Plan Location** screen.



2. To assign a new location, select from the location list, click **Add Location**. An open location number is automatically assigned to the record.



Tip: The location list must be set up by a system administrator.

3. To manually assign a location, double-click the location field and then enter a new location. Location names must be in the format Name #, where the name and number are separated by a space (e.g., Tube 123).

4. To release a location that is no longer in use, select the location on the **Plan Location** screen and click **Release Location**. Click **Yes** to confirm the release. TRAKiT holds locations until they are released.

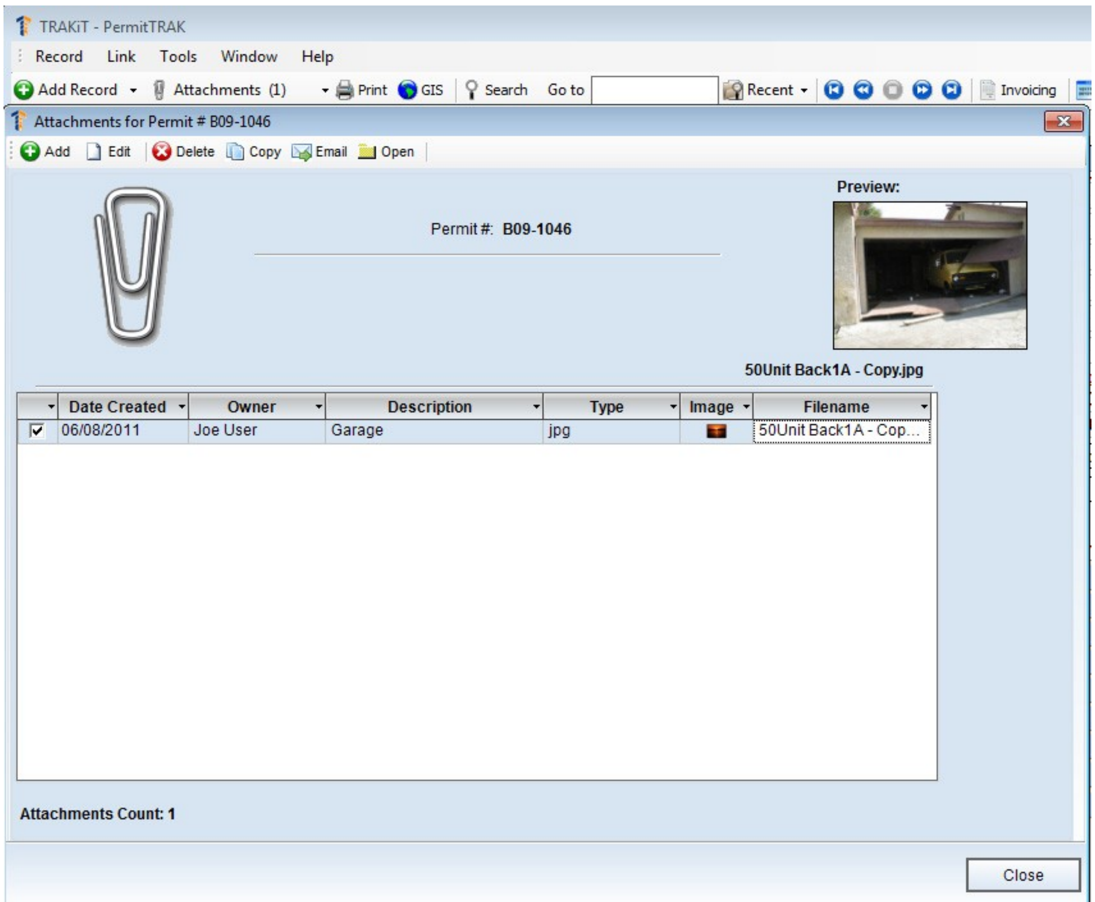
Attachments

Overview

You can attach a file with any file format to a record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, AEC TRAK, LandTRAK, or CRM TRAK. Attachments are stored on the server and can be accessed directly through the Attachments screen.

Attachments are viewed using the external applications associated viewer (e.g., PDF files are viewed using Adobe Acrobat Reader).

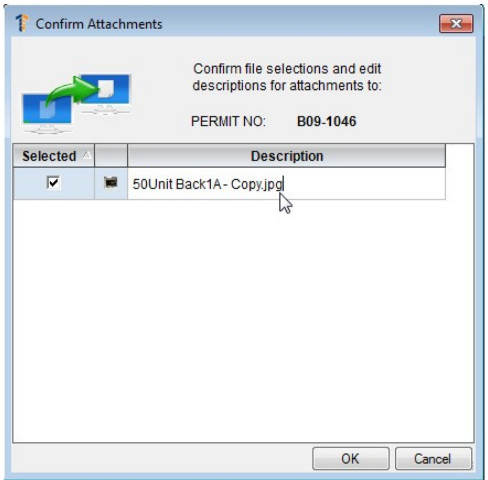
Attachments is available on the main toolbar.



Attaching Files

To attach a file to a TRAKiT record:

1. On the menu bar click **Attachments** to open the **Attachments** screen.
2. Click **Add**.
3. In Windows Explorer, navigate to the directory containing the document(s) you wish to attach.
4. Select the document(s) and click **Open**, or double-click the document name. Confirm the attachment.



5. Enter a description (the file name is the default description).
6. Click **OK**.

Tip: The date and the name of the individual who attached the document are recorded automatically.

Tip: Define the default location for attachments in Help > User Preferences > Configuration. Click the folder ()and select your default attachment location.

Editing Attachments

To edit an existing attachment:

1. On the toolbar click **Attachments** to open the **Attachments** screen.
2. Select the attachment.
3. Click **Edit**.
4. Edit the attachment.
5. Save the attachment.
6. Close the application.
7. Click UPLOAD AND EXIT. (This replaces the existing attachment with the modified attachment).

Tip: The description of the attachment can be changed by a System Administrator or any user that can add an attachment.

Delete Attachments

To delete an attachment from a TRAKiT record:

1. On the toolbar click **Attachments** to open the **Attachments** screen.
2. Select the attachment.
3. Click **Delete**.
4. Click **Yes** to confirm the deletion.

Add a Copy of an Attachment

To add a copy of an attachment:

1. On the toolbar click **Attachments** to open the **Attachments** screen.
2. Select the attachment.
3. Click **Copy**.
4. Select a destination location.
5. Click **OK**.

Add an Attachment to an Email

To automatically add the TRAKiT attachment as an attachment to an email:

1. On the toolbar click **Attachments** to open the **Attachments** screen.
2. Select the attachment.
3. Click **E-Mail**.

Open or View Attachments

You can view images and documents that are attached to a TRAKiT record.

To view images and documents:

1. On the toolbar click **Attachments** to open the **Attachments** screen
2. Select the attachment.
3. Click **Open**.
4. The image/document opens the default associated application to view the image/document.

Default Attachment Location

TRAKiT provides the ability to define a default location for attaching files.

To define a default attachment location:

1. Click **Help** from the menu.
2. Select **User Preferences**.
3. Select **Configuration**.
4. Click the folder ( ).
5. Navigate to the location you want to set as the default.
6. Click **OK**.

Valuations

Overview

TRAKiT can calculate and track the job value for a record in PermitTRAK from the Valuations panel.

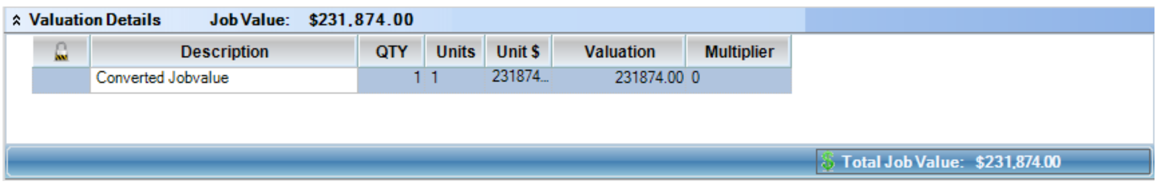
To open the **Valuation Detail** panel:

1. Locate the PermitTRAK record.
2. On the permit screen, click **Valuation Details** panel.

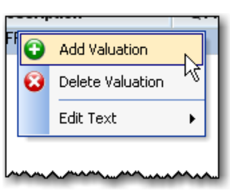
Adding Valuations

To add a valuation:

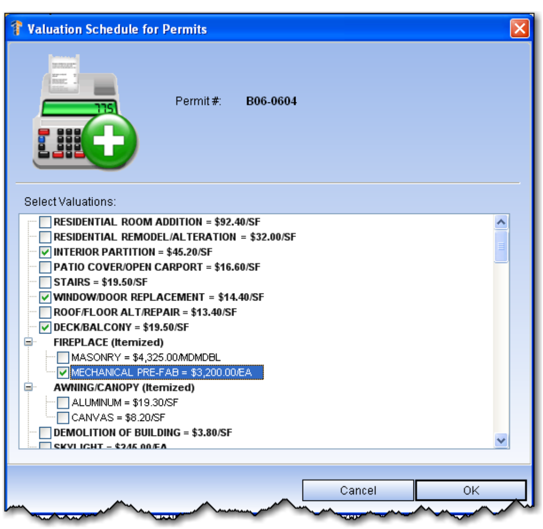
1. Open the **Valuation Details** panel.



2. Right-click in the **Valuations Detail** table list and select Add Valuation. Or in the **Valuations** functions menu click **Add Valuations**.



3. Select one or more valuation items by which the job value is calculated. To expand a valuation category, click the plus sign or double-click the category name.



4. Click **OK**.

Deleting Valuations

To delete a valuation:

1. Open the **Valuation Details** panel.
2. In the grid, select the valuation category or the valuation item to be deleted.
3. Right-click and select **Delete Valuations** or in the **Valuations** function menu click **Delete Valuation**.
4. Click **Yes** to confirm the deletion.

Fees

Overview

You can assess fees, collect payments, print receipts, and perform other cashiering functions from the Financial Information panel.

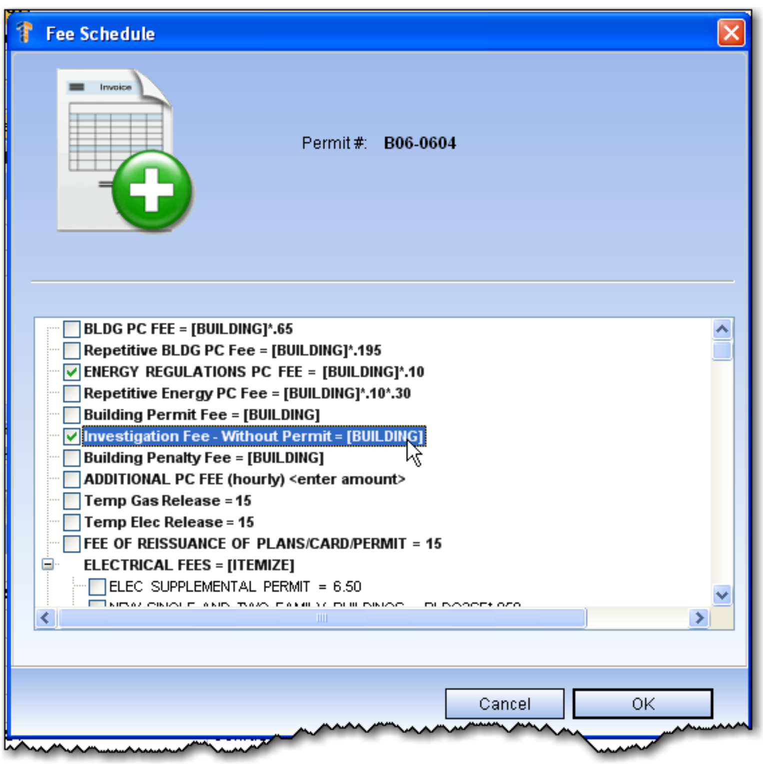
To open the **Financial Information** panel:

1. Locate the PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK record.
2. From the application main screen, click **Financial Information**.

Assessing Fees

To assess fees in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK:

1. Open the **Financial Information** panel.
2. Right-click in the **Financial Information** panel and select **Add Fee**. Or in the **Financial Information** functions menu click **Add Fee**.
3. Select one or more fees to assess. To expand a fee category, click the plus sign or double-click the category name.



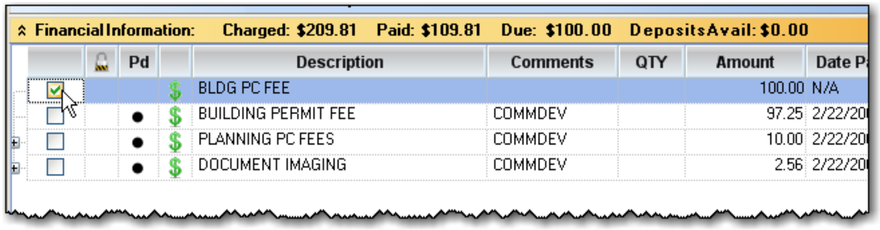
4. Click **OK**.

Tip: In LicenseTRAK, you can assess a prorated fee (less than 100 percent) or a penalty fee (more than 100 percent). Select the fee(s) to assess, and then select a percentage from the **Pro-Rate/Penalty %** drop-down list.

Deleting Fees

To delete a fee:

1. Open the **Financial Information** panel.
2. In the **Financial Information** grid, select the fee or subfee to be deleted.



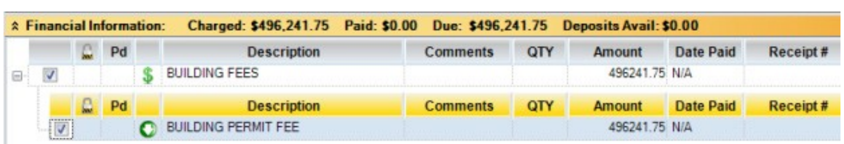
3. Right-click and select **Delete Item** or in the **Financial Information** functions menu select **Delete Item**.
4. Click **Yes** to confirm the deletion.

Tip: If a fee has already been paid, you must unpay it before it can be deleted.

Deleting a Subfee

To delete a subfee:

1. Open the **Financial Information** panel.
2. In the **Financial Information** grid, select the subfee item to be deleted.



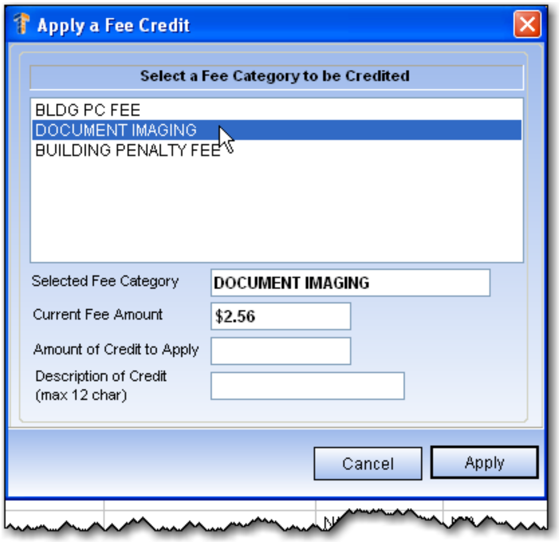
3. Right-click and select **Delete Item** or in the **Financial Information** functions menu select **Delete Item**.
4. Click **Yes** to confirm the deletion.

Tip: If a fee has already been paid, you must un-pay it before it can be deleted.

Applying a Credit

To apply a credit toward a fee that has been assessed on a PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK record:

1. Open the **Financial Information** panel.
2. Right-click and select **Apply Credit** or in the **Financial Information Payment Options** menu select **Apply Credit**.
3. Select the fee category to which you are applying a credit.

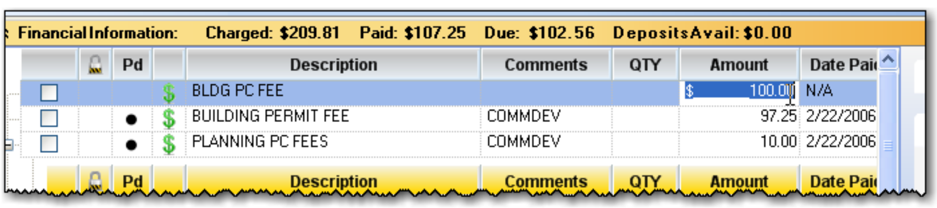


4. Enter the credit amount.
5. Enter a description of the credit (maximum length of 12 characters).
6. Click **Apply**. The credit is added as a subfee item and appears in red.

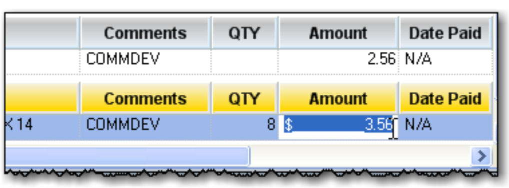
Overriding a fee

To override a fee amount:

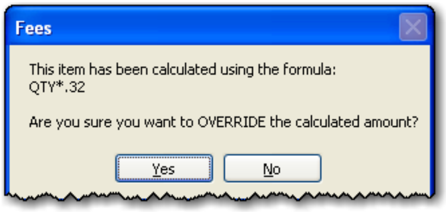
1. Open the **Financial Information** panel.
2. In the **Financial Information** grid, select the fee category or fee item.



3. Click the **Amount** column of the fee item you wish to override.



4. Enter the new desired fee amount in the **Amount** column.
5. Click **Yes** to confirm the fee override.

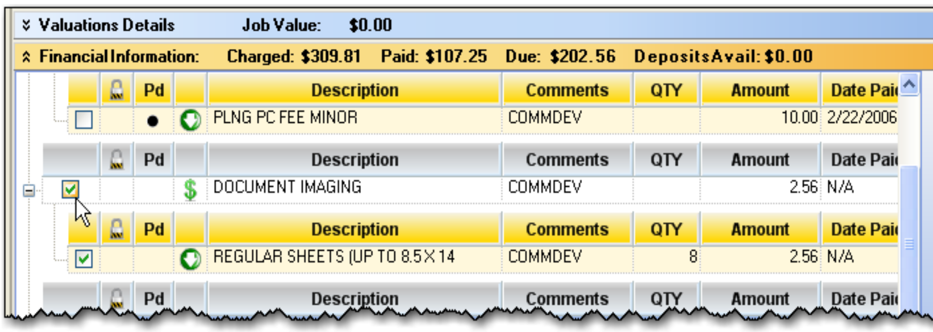


Note: The ability to override a fee is controlled by user privilege.

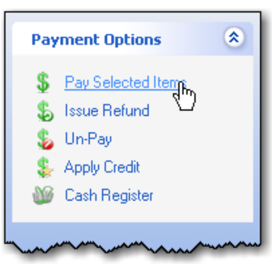
Paying Fees

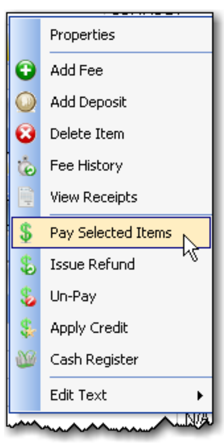
To pay a fee:

1. Open the **Financial Information** panel.
2. In the **Financial Information** grid, select the fee(s) you wish to pay, or



Right-click and select **Pay Selected Items** or in the **Financial Information Payment Options** menu select **Pay Selected Items**.

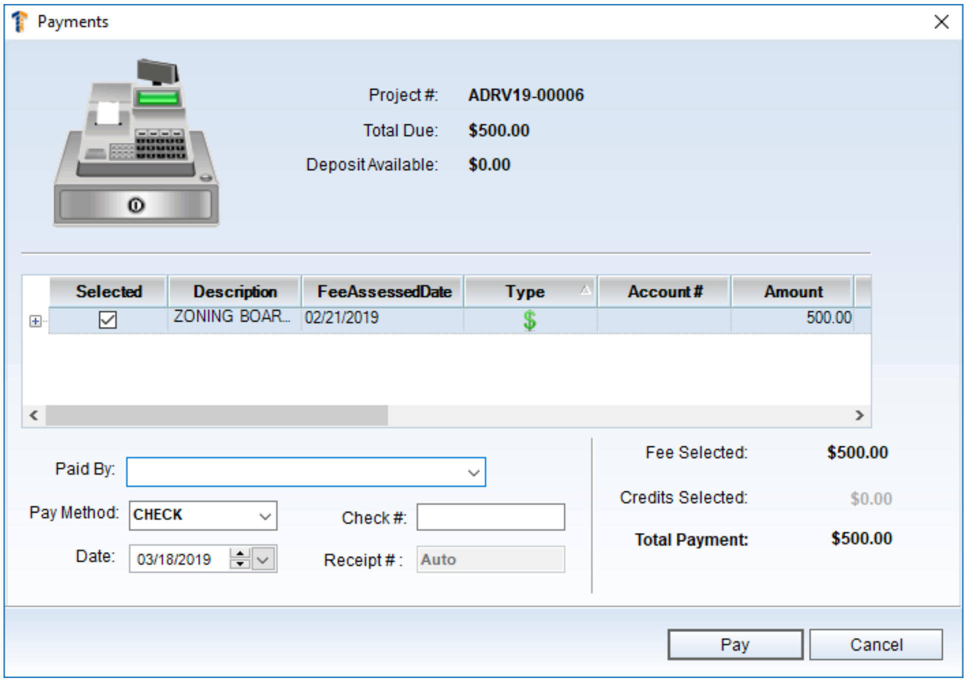




3. Complete the payment information in the lower half of the screen:
   a. Enter the name of the person who is paying the fee (Paid By). You can select a record contact name from the drop-down list or type in another name.
   b. *Optional* Enter the amount of payment if it is less than the total amount selected.
   c. Change the date of payment, if needed. Default is the current date.

d. Select the pay method from the drop-down list. If you select **Check**, then a check number is required in the next step. If you select **Credit Card**, then a credit card authorization number is recommended in the next step.

e. Enter the check or credit card authorization number, if applicable.



4. Click **Pay**. The symbol appears in the Paid column and a receipt number may appear in the Receipt # column of the upper grid, depending on your setup.

Paying Fees Using a Trust Account

Trust accounts are deposited funds that are held by the agency on behalf of anyone doing business with the agency (e.g., a contractor). The contractor can draw on these funds to pay fees assessed on activities in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, and AEC TRAK.

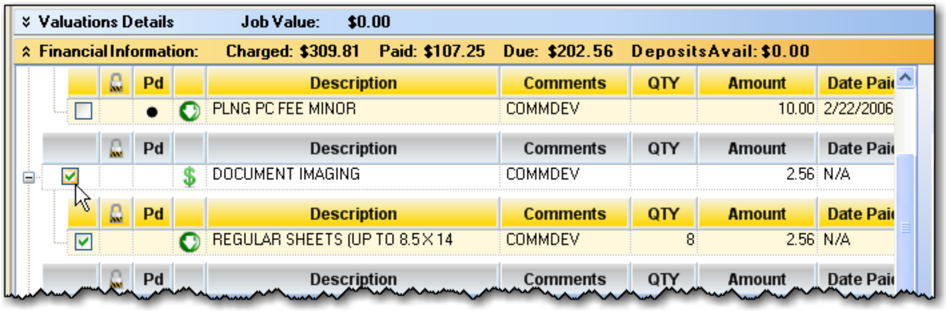
1. Ensure that the individual or contractor record from AEC TRAK is associated.
2. Select the individual or contractor AEC TRAK record from the **Paid By** list.

   Note: If you do not see the individual or contractor in the **Paid By** list, then the record is not correctly linked in the **Contacts** pane.
3. Select Trust Account as the method of payment. An AEC TRAK record with an attached trust account will display the trust account number link. Click on this link to display the trust account's current balance. If the paid by name does not have an attached trust account, a warning notice is displayed.
4. Change the date of payment, if needed. Default is the current date.
5. Click **Pay**. The symbol appears in the **Paid** column and a receipt number may appear in the **Receipt #** column of the upper grid, depending on your setup.

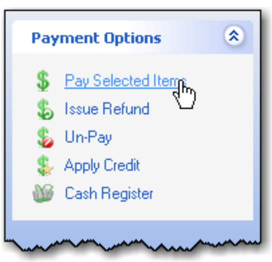
Paying Subfees

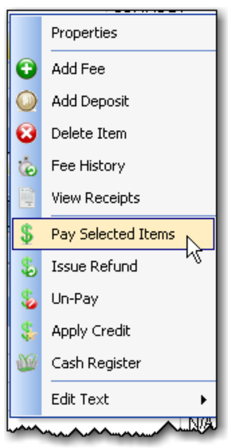
To pay a subfee:

1. Open the **Fee Payment Details** screen.
2. In the **Financial Information** grid, select the subfees you wish to pay.

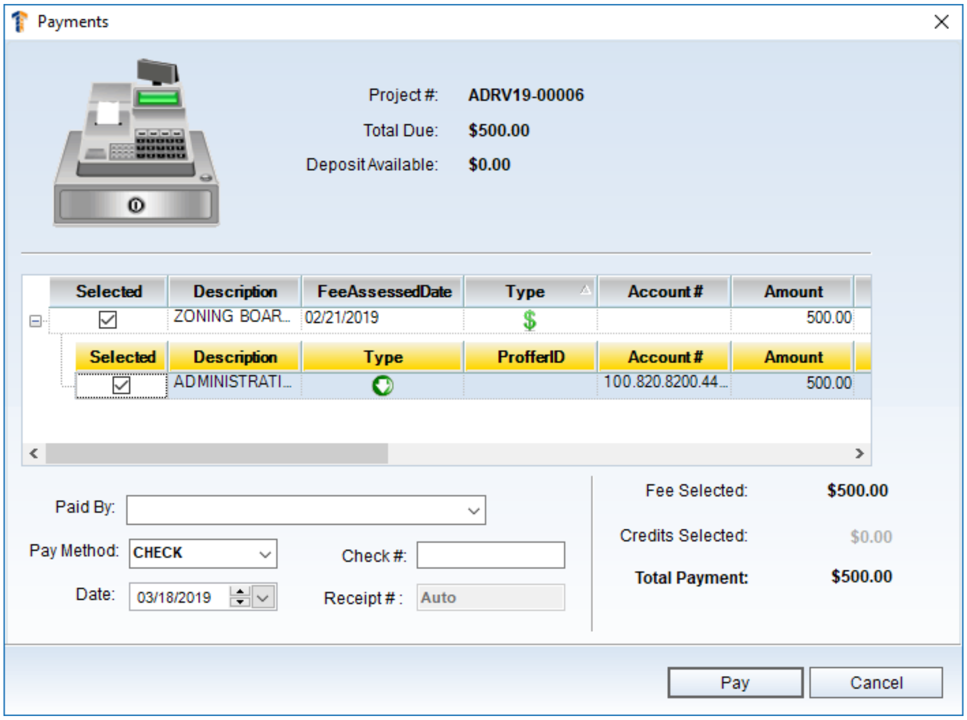


3. Right-click and select **Pay Selected Items** or in the **Financial Information Payment Options** menu select **Pay Selected Items**.





4. Click the plus sign to display the subfee you wish to pay.
5. Select the subfees you wish to pay.



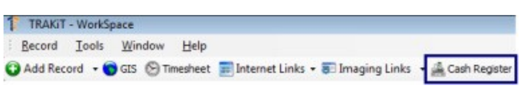
6. Complete the payment information in the lower half of the screen:
    a. Enter the name of the person who is paying the fee (Paid By). You can select a record contact name from the drop-down list or type in a name.
    b. (Optional) Enter the amount of payment if it is less than the total amount selected.
    c. Enter the payment date.
    d. Select the payment method from the drop-down list. If you select **Check**, then a check number is required. If you select **Credit Card**, then a credit card authorization number is recommended. To pay by trust account, see “Managing Trust Accounts.”
    e. Enter the check or credit card authorization number, if applicable.
7. Click **Pay**. The  symbol appears in the **Paid** column and a receipt number may appear in the **Receipt #** column of the upper grid, depending on your setup.

Cash Register

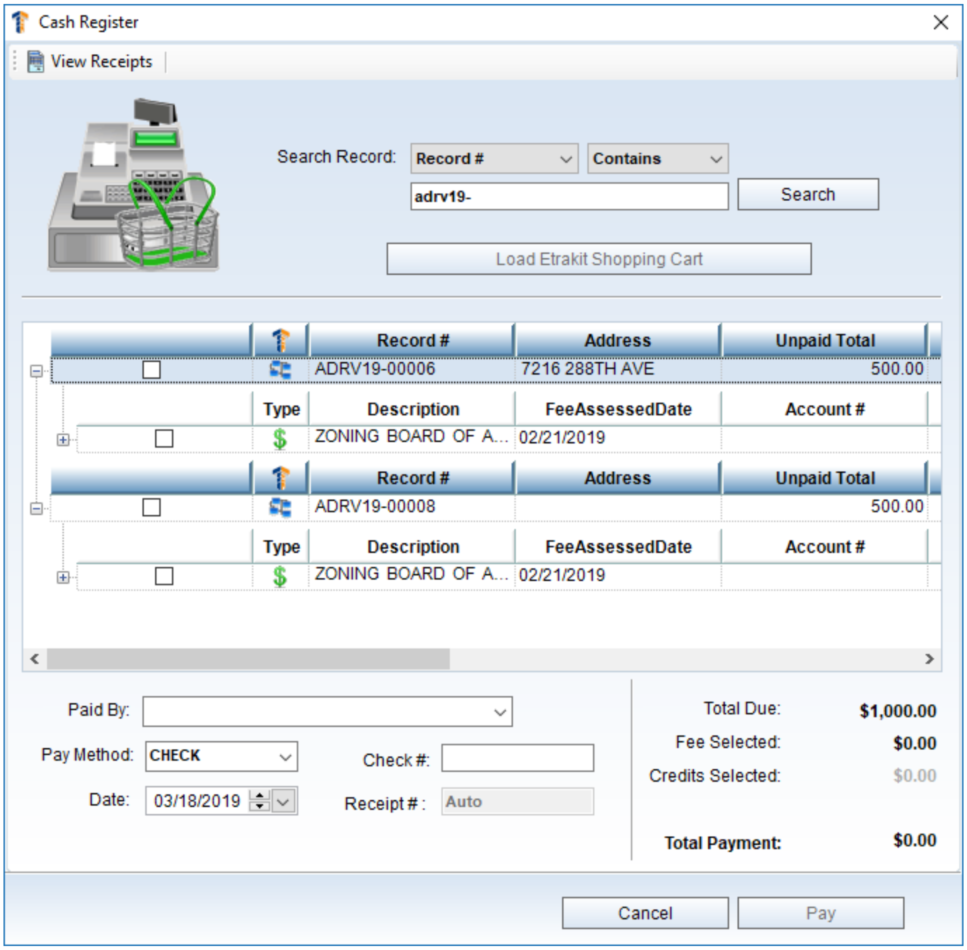
Cash Register allows you to directly access unpaid fees.

To use Cash Register:

1. Open WorkSpace.
2. Click **Cash Register** on the menu bar.



3. Enter the record number, address, contact name, or reference number of the record you wish to pay.

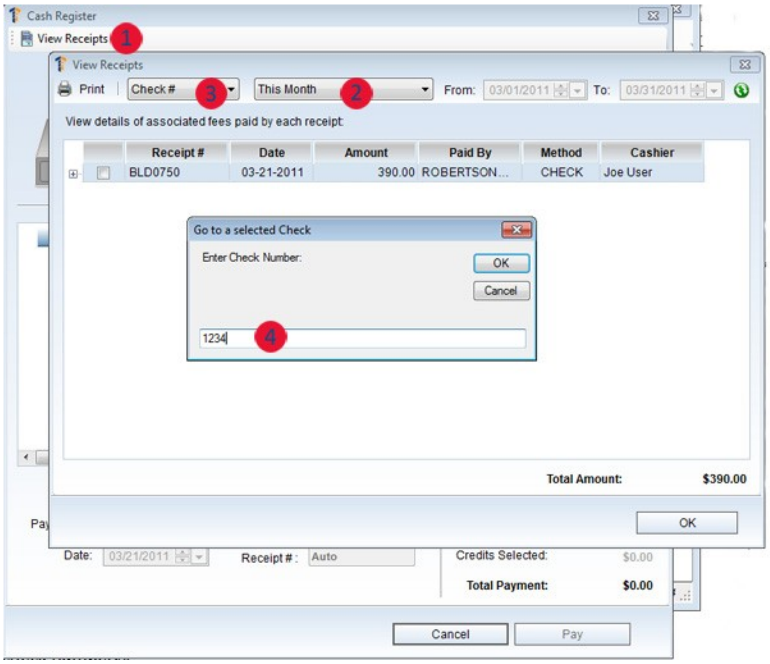


4. A list of records that match your search criteria appears.
5. If only one record matches your search criteria, it is loaded automatically to the Cash Register. If multiple records match your search criteria, a selection list appears.
6. Complete the payment information in the lower half of the screen:
7. Enter the name of the person who is paying the fee (Paid By). You can select a record contact name from the drop-down list or type in another name.
8. (Optional) Enter the payment amount if it is less than the total amount selected.
9. Enter the payment date.
10. Select the payment method from the drop-down list. If you select **Check**, then a check number is required. If you select **Credit Card**, then a credit card authorization number is recommended. To pay by trust account, see “Managing Trust Accounts.”
11. Enter the check or credit card authorization number, if applicable.
12. Click **Pay**. The  symbol appears in the **Paid** column and a receipt number may appear in the **Receipt #** column of the upper grid, depending on your setup.

To search payments by check number:

1. Click **View Receipts** on the **Cash Register** window.

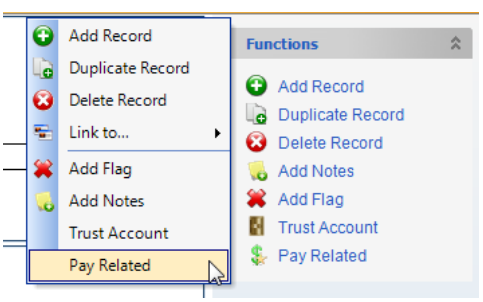
2. Set a time frame to search.
3. Select **Check #**.
4. Enter the check number.



Paying Fees from AEC TRAK

To pay fees on permit, project, and code records that are associated with an AEC record:

1. Open AEC TRAK
2. Right-click and select **Pay Related** or in the **Company Information** panel **Functions** menu select **Pay Related** to display all outstanding fees on related records.



3. Process the payment as described in “Paying Fees.”

Tip: To pay additional records from this screen, follow the instructions for adding a record to the Cash Register.

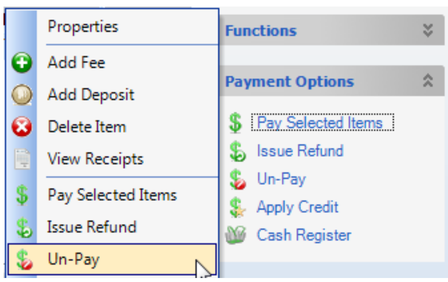
Un-Paying Fees

Un-Pay allows you to correct a data entry mistake during the fee collection process. If you wish to return fees that have already been collected and processed, follow the procedure to issue a refund.

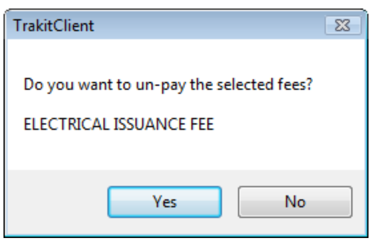
To use Un-Pay:

1. On the **Financial Information** screen, select the fee or fees you wish to un-pay.

2. Right-click and select **Un-pay** or in the **Financial Information Payment Options** menu select **Un-pay**.



3. Click **Yes** to confirm the un-pay.

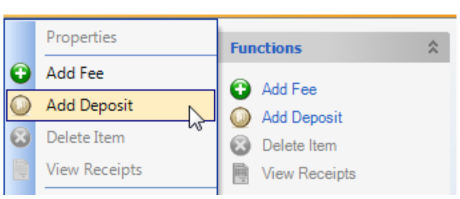


Collecting Deposits

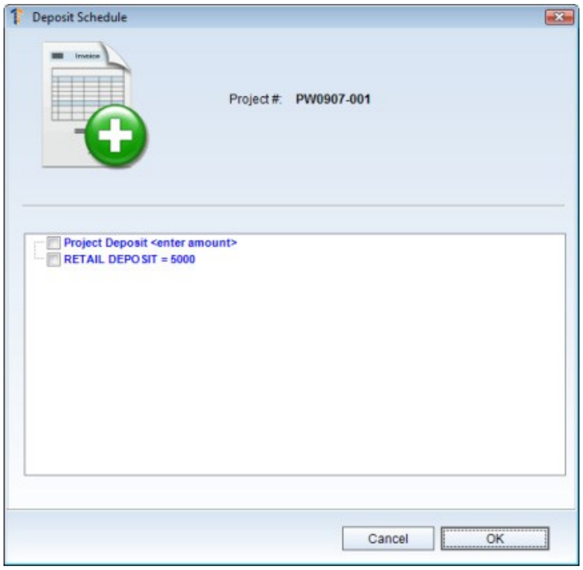
Tip: This feature must be set up by a system administrator.

To collect deposits on a TRAKiT record:

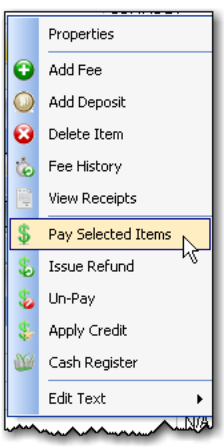
1. Open the **Financial Information** panel.
2. Right-click and select **Add Deposit** or in the **Financial Information Functions** menu select **Add Deposit**.

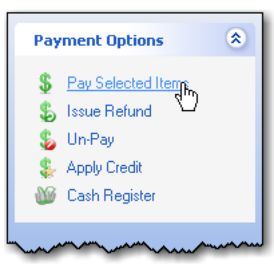


3. Select one or more deposits to collect.



4. Click **OK**.
5. Enter the amount of the deposit(s), if required. Depending on your setup, deposit amounts may be calculated automatically.
6. Right-click and select **Pay Selected Items** or in the **Financial Information Payment Options** menu select **Pay Selected Items**.





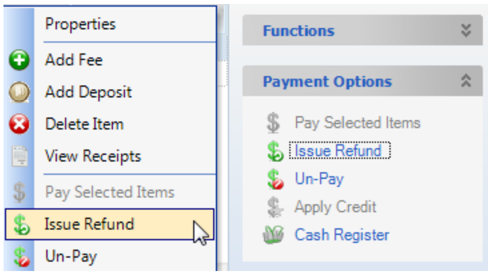
7. Process the deposit payment as you would for a fee.
8. Depending on your setup, you may be prompted to pay fees with the deposit. Click **Yes** to pay outstanding fees with the deposit or click **No** to process payments by another means.

Tip: If your system is set up as in step 8, once a deposit has been collected for a record, TRAKiT prompts you to pay fees with the deposit whenever new fees are assessed.

Issuing a Refund

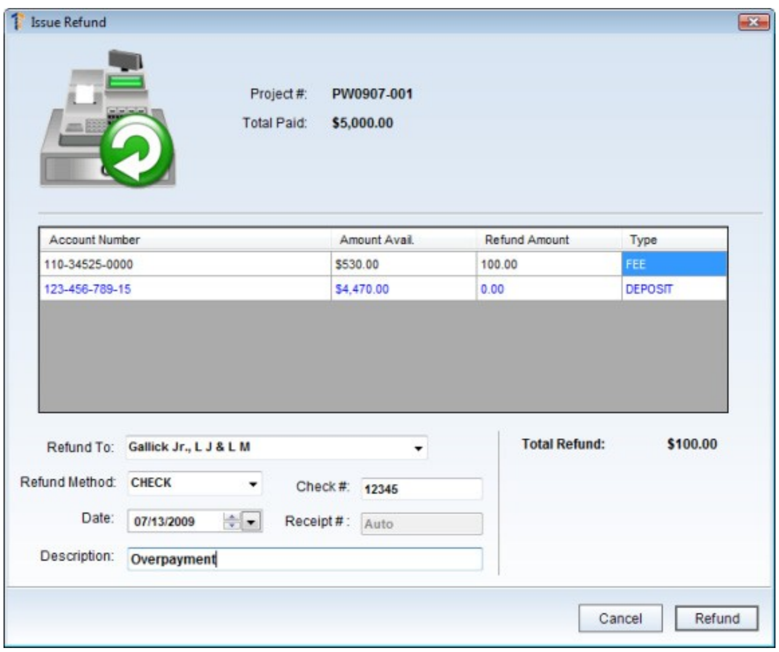
To issue a refund of fees or deposits that have been collected and processed:

1. Open the **Financial Information** panel.
2. Right-click and select **Issue Refund** or in the **Financial Information Payment Options** menu select **Issue Refund**.

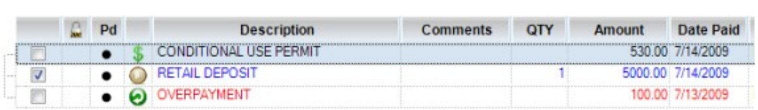


Tip: Ensure that an account number is assigned to the fee you wish to refund. Depending on your setup, account numbers may be assigned automatically or added on the Fee Information panel Account # column.

3. Enter the amount of the refund in the **Refund Amount** column.
4. Enter a description of the refund in the **Description** field.



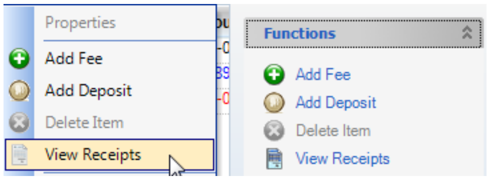
5. Click **Refund**. The refund is added as a fee transaction and appears in red.



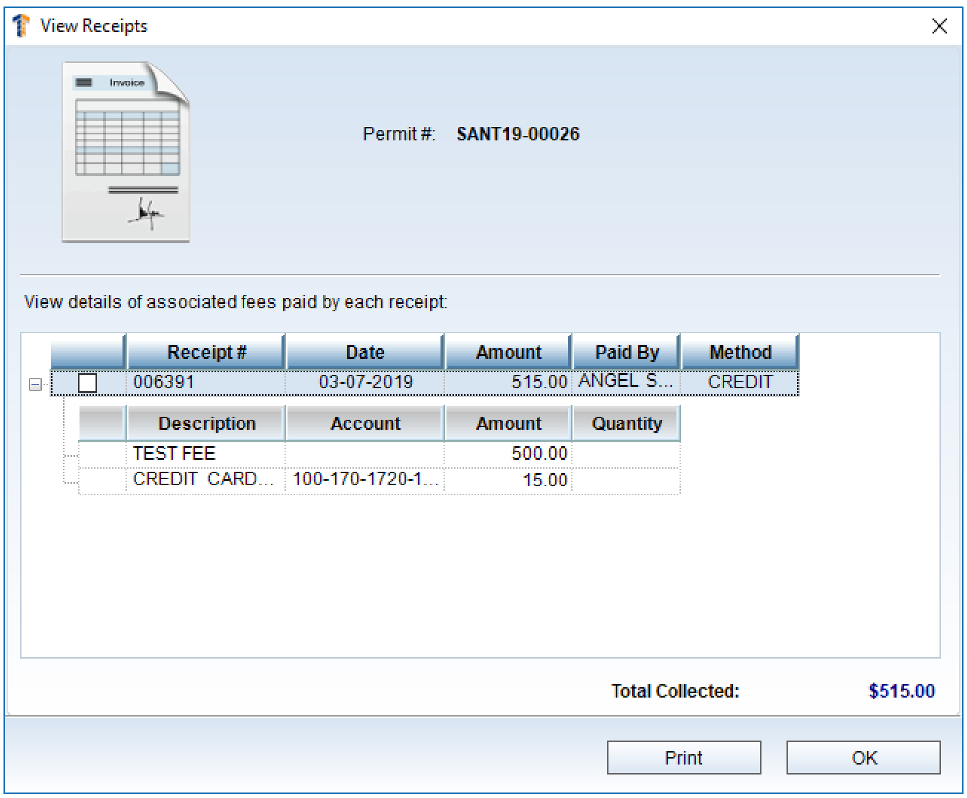
Printing a Receipt

To print a receipt for a fee transaction:

1. Open the **Financial Information** panel.
2. Click **View Receipts**.



3. Select the receipt you want to print.



4. Click **OK**.

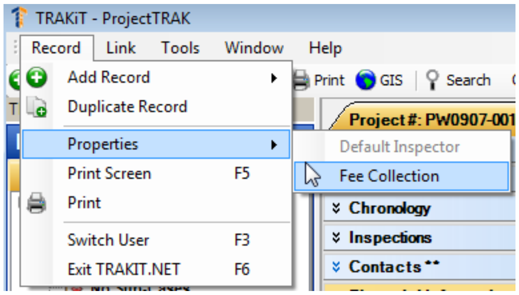
Tip: Clicking the plus sign next the receipt number will display all fees that were paid on that receipt.

Changing the Fee Collection Settings for a Record

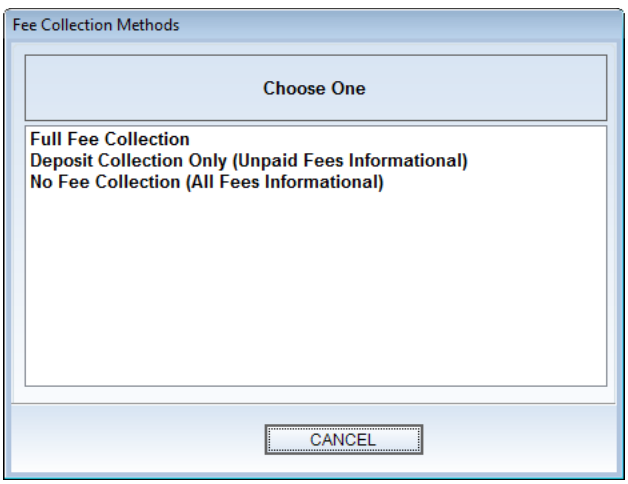
The fee collection settings determine how a fees are processed and tracked on a given record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK.

To change the fee collection settings for a record:

1. Locate the record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK.
2. From the **Record** menu, select the **Properties** submenu.
3. Click **Fee Collection**.



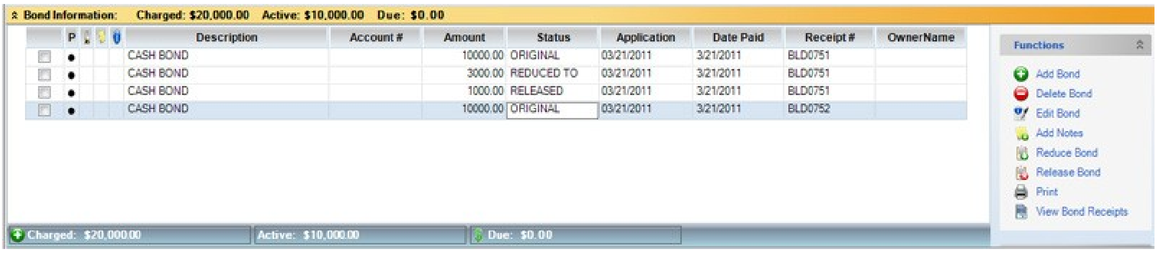
4. Select one of the fee collection methods for the record:
   - Select **Full Fee Collection** (default) for records on which all fees must be paid. If deposits are enabled, fees that are added after deposits have been expended are processed as receivables.
   - Select **Deposit Collection Only (Unpaid Fees Informational)** for records on which fees are charged against a deposit and the total fees collected cannot exceed the deposit amount. Once deposits have been exhausted, additional fees are informational.
   - Select **No Fee Collection (All Fees Informational)** for records on which no payments are taken nor deposits made, but the dollar amount of the project is tracked (for example, exempt permits issued to the jurisdiction to build a fire station).



Bonds

Overview

The Bond Information Panel provides the capability to add, edit, reduce, release, and delete bond information and is available in PermitTRAK and ProjectTRAK.



To open the **Bond Information** panel:

1. Locate the PermitTRAK or ProjectTRAK record.
2. From the application main screen, click **Bond Information**.

Adding Bonds

To add a bond:

1. Open the **Bond** panel.
2. Right-click in the **Bond Information** panel and select **Add Bond**. Or in the **Bond Information** functions menu click **Add Bond**.
3. Select one or more bonds.
4. Click **OK**.

To add the detail information about the bond:

1. Right-click in the **Bond Information** panel and select **Edit Bond**. Or in the **Bond Information** functions menu click **Edit Bond**.
2. (Optional) Enter the bond amount in **Amount**.
3. (Optional) Enter remarks in **Remarks**.
4. (Optional) Enter contact information.

To add notes to a bond:

1. Right-click in the **Bond Information** panel and select **Add Notes**. Or in the **Bond Information** functions menu click **Add Notes**.
2. Add notes in **New Notes**.
3. Click **Add**.

Deleting Bonds

To delete a bond:

1. Right-click in the **Bond Information** panel and select **Delete Bond**. Or in the **Bond Information** functions menu click **Delete Bond**.
2. Click **Yes** to confirm deletion.

Paying Bonds

To pay bonds:

1. Right-click in the Bond Information panel and select Pay Selected Bond. Or in the **Payment Options** menu click **Pay Selected Bond**.
2. Select or enter the paid-by name.
3. Select the payment method.
4. (Optional) Enter a check number, if required.
5. (Optional) Enter an expiration date, if required.
6. Click **Pay**.
7. (Optional) Print a receipt.

Tip: Clicking on **Due** will open the **Unpaid Bonds** window.

To view or print receipts for previously paid bonds:

1. Click **View Bond Receipts**.
2. Click the plus sign to expand a specific item.
3. Select the check box and click **Print** to reprint a receipt.

Tip: Clicking on **Active** will open the **View Bond Receipts** window.

To unpay a bond:

1. Select the bond to unpay.
2. Right-click in the **Bond Information** panel and select **Un-Pay Bond**. Or in the **Payment Options** menu click **Un-Pay Bond**.

Reducing and Releasing Bonds

To reduce a bond:

1. Select the bond to reduce.
2. Right-click in the **Bond Information** panel and select **Reduce Bond**. Or in the **Bond Information** functions menu click **Reduce Bond**.
3. Click **Yes** to confirm you have selected the correct bond.
4. Enter the reduced bond amount.
5. To copy the payment information from the original bond, click **Yes**. To enter new payment information click **No**.

To release a bond:

1. Select a bond.
2. Right-click in the **Bond Information** panel and select **Release Bond**. Or in the **Bond Information** functions menu click **Release Bond**.
3. Click **Yes** to confirm the release.

Documents

Overview

You can generate documents, such as inspection cards, notification letters, and certificates of occupancy, directly from the **Print** screen of a record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK. You can also create your own merge documents to use with TRAKiT. All documents can be printed, sent to contacts via email, displayed on your screen, and attached to a record.

Print Screen

To open the Print screen for a record:

1. Locate the PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK record.
2. Click the Print button (Print) on the toolbar or press Alt+p.

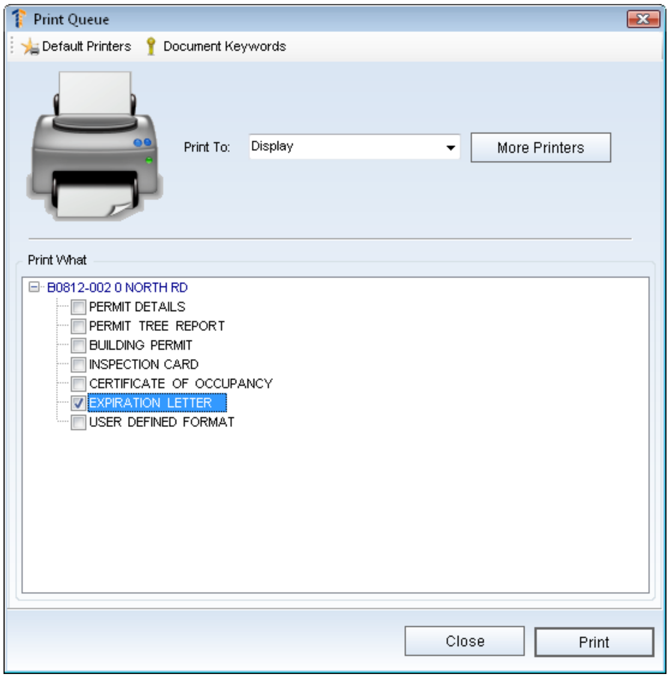
To open other Print screens:

- Open the **Inspections** panel, and click **Print Inspections** from the **Utilities** sidebar menu.
- Open the **Review** panel, and click **Print Review** from the **Utilities** sidebar menu.
- Open your WorkSpace, and click the Print button.
- Open the **Multiple Violations** panel, and click **Print** from the **Functions** sidebar menu.

Printing Documents

To print a document for a TRAKiT record:

1. Open the **Print** screen.
2. Select one or more documents. To create a document that is not on the list, select **User Defined Format** (see "Creating a Merge Document").
3. Select the print destination.
    - To print the document without previewing it, select **Default Printer 1** or **Default Printer 2**.
    - To preview the document, select **Display Window**. You will be able to print, save, or modify the document in the application that created it (e.g., Microsoft Word).
    - To send the document via email as an attachment, select **E-Mail**. You will be able to add comments and recipients before sending the email.
    - To export (save) the document to a file, select **File**. You will need to specify the file name and an export location.
4. (Optional) If you selected Default Printer 1 or 2 or **File** in step 3, select **Attach copy to record** to automatically add the document to the Attachments screen of the record. You will be able to enter a description for the attachment.
5. (Optional) If you selected **E-Mail** in step 3, you need to select which contacts to add. Use the Ctrl key to select more than one contact and click the CONTINUE button.



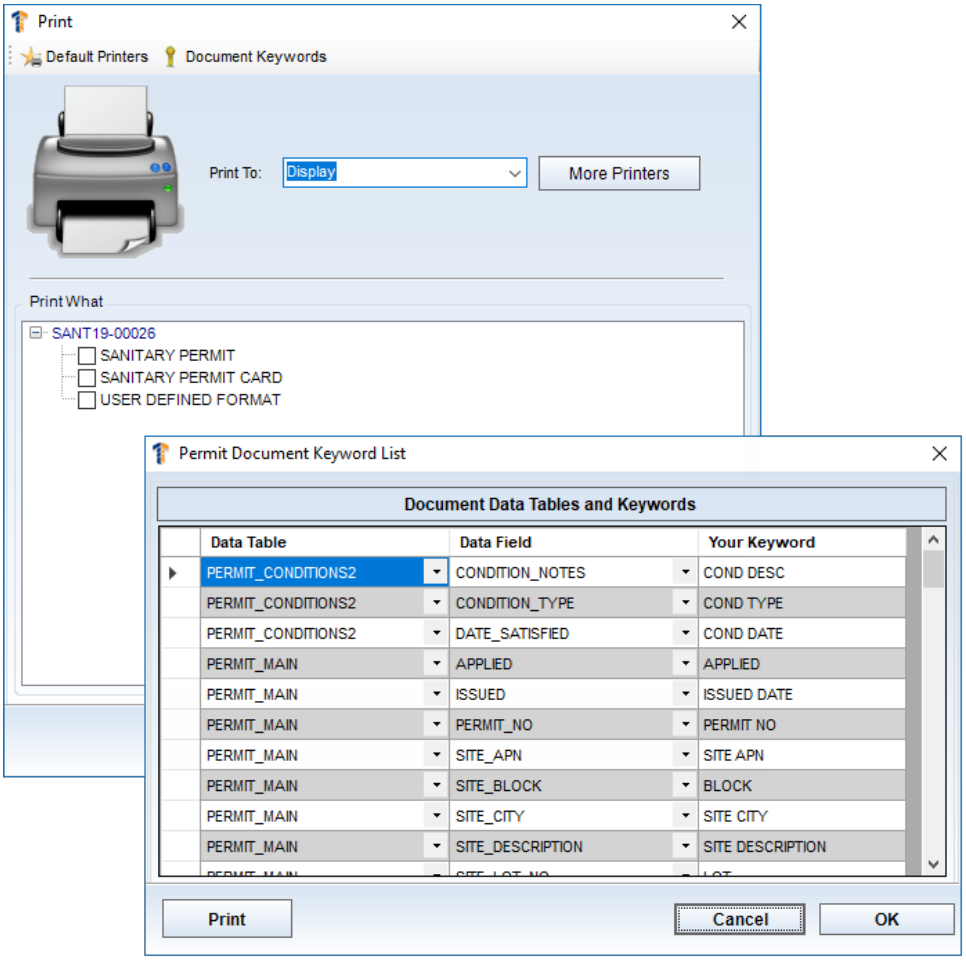
6. Click **Print**.

Creating a Merge Document

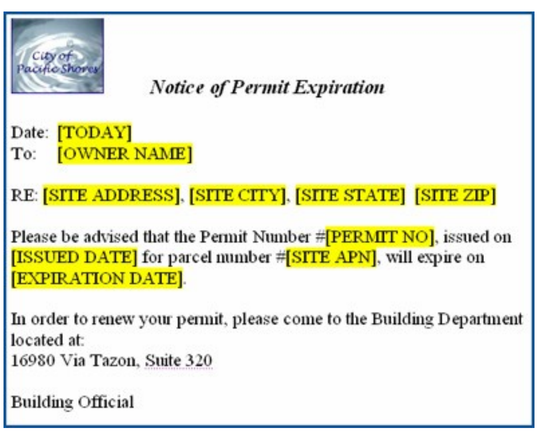
You can create your own merge document to insert data from a TRAKiT record into a Microsoft Word document template.

To 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:
    - 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.



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



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].

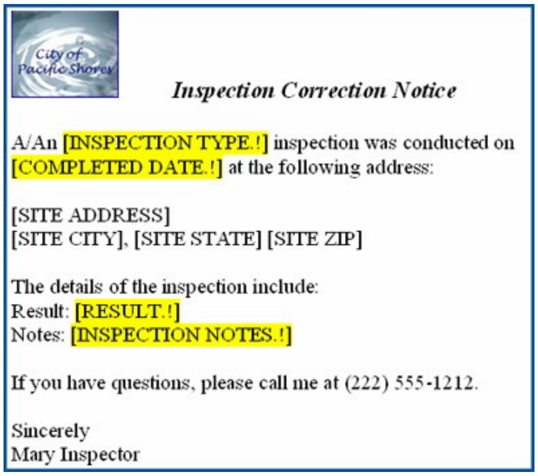
In order to renew your permit, please come to the Building Department located at:
16980 Via Tazon, Suite 320

Building Official

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

c. 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.

d. 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]

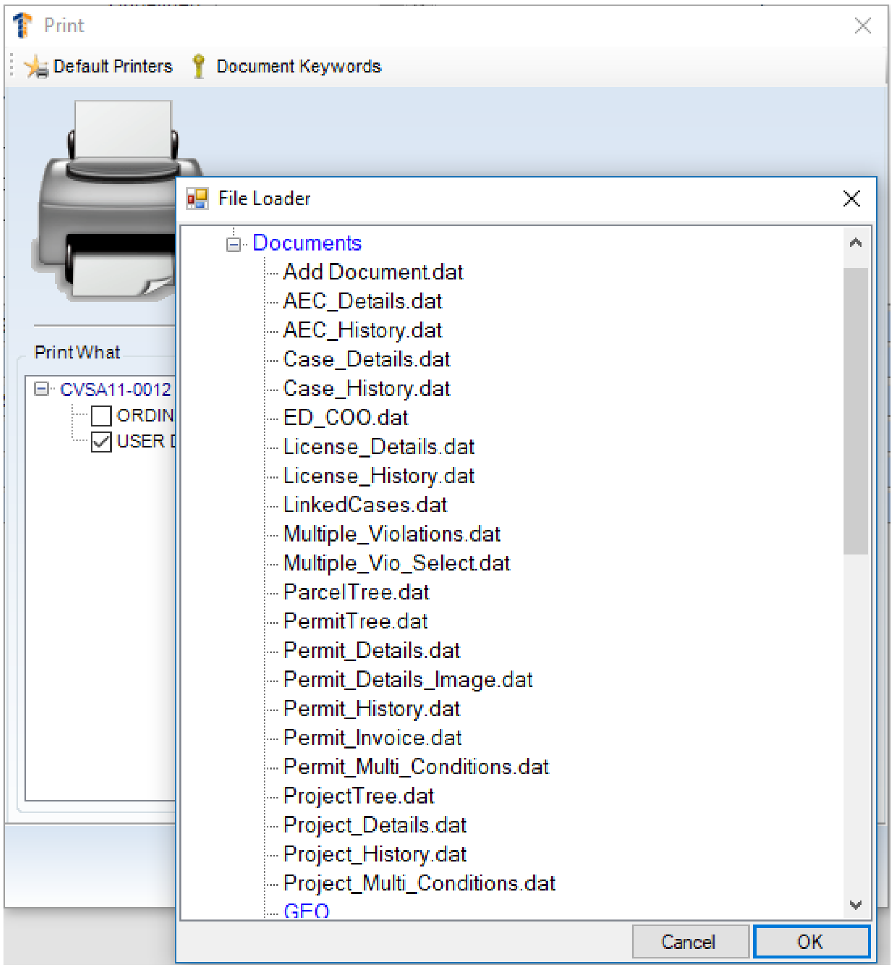
The details of the inspection include:
Result: [RESULT.!]
Notes: [INSPECTION NOTES.!]

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, as desired (see "Creating Documents").



8. Click **OK**.

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

Printing Documents for Multiple Records with the Print Queue

You can create documents for multiple records from the same screen using the print queue feature.

To use the print queue:

1. Locate a record for which you wish to create documents.
2. Open the **Print** screen.
3. Select the documents you wish to create for each record.
4. Create the documents as you would for a single record.

Tip:

- The print queue must be enabled by a system administrator.
- Records remain in the print queue until documents are created or until the record is removed from the queue.

Inspections

Overview

The Inspections screen manages inspection information associated with a record in PermitTRAK, ProjectTRAK, CodeTRAK, or LicenseTRAK.

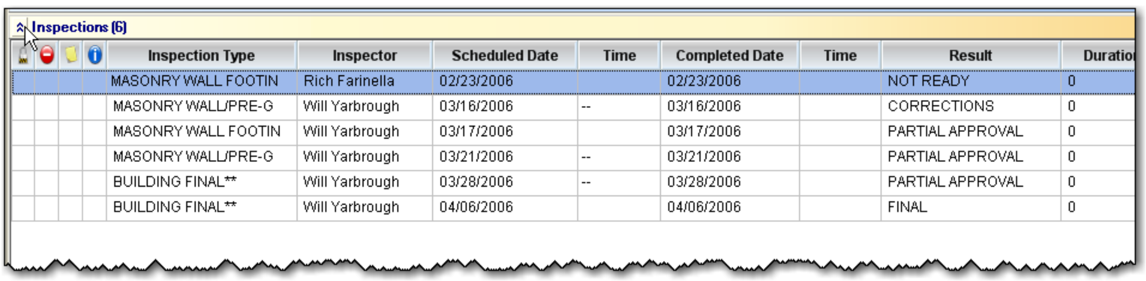
To open the Inspections panel:

1. Locate the PermitTRAK, ProjectTRAK, CodeTRAK, or LicenseTRAK record.
2. From the application main screen, click the **Inspections** panel.

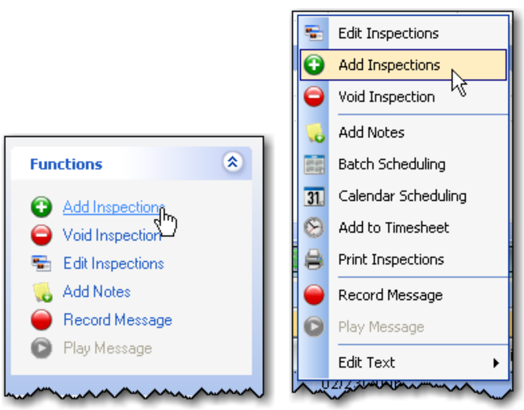
Scheduling Inspections

To schedule inspections on a single record in PermitTRAK, ProjectTRAK, CodeTRAK, or LicenseTRAK:

1. Open the **Inspections** panel.



2. Right-click in the **Inspections** table list and select **Add Inspections**. Or in the **Inspections** functions menu click **Add Inspections**.



3. Complete the inspections information.
   a. Select Inspection—select one or more inspections to schedule.
   b. Select Inspector—select the inspector conducting the inspection from the drop-down list, or select **Default Inspector (if any)**.
   c. Scheduled Date—enter the scheduled date of the inspection or select one of the following predefined date settings:
      - Next Day—sets the scheduled date to the next calendar day.
      - Today—sets the scheduled date to the current date.

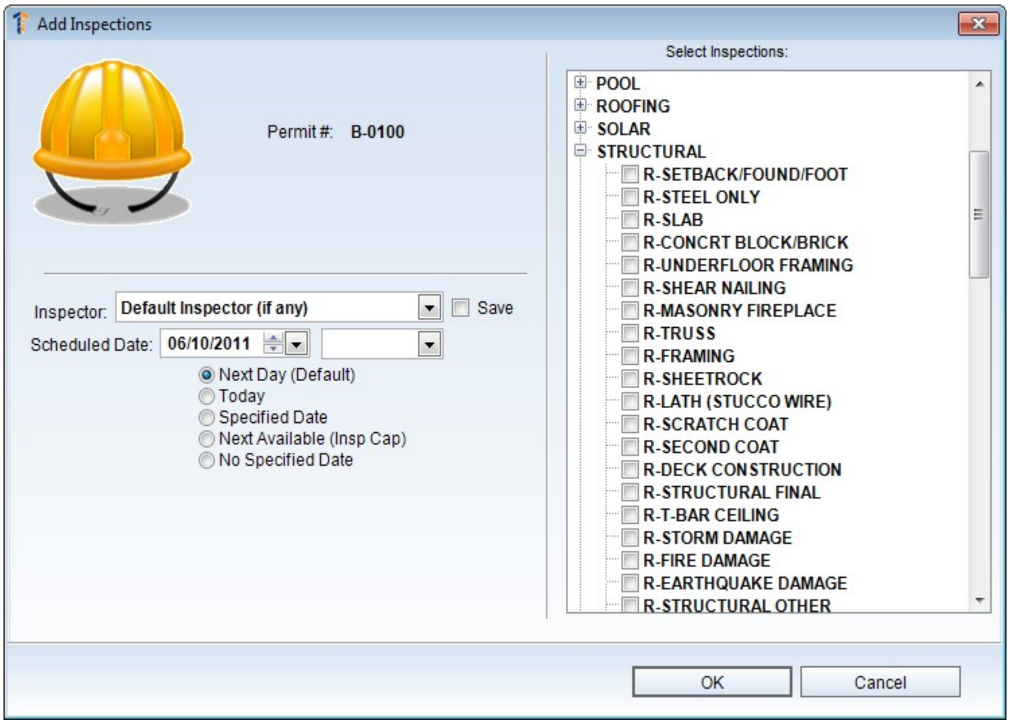
- Specified Date—maintains the date the user manually enters.
- Next Available—sets the scheduled date to the next day an inspection can be scheduled.

Note: Inspection Capping must be enabled to use this setting.

- No Specified Date—No date is entered.

d. Scheduled Time—enter the scheduled time of the inspection, if applicable.

Tip: Select **Save** to maintain all settings.

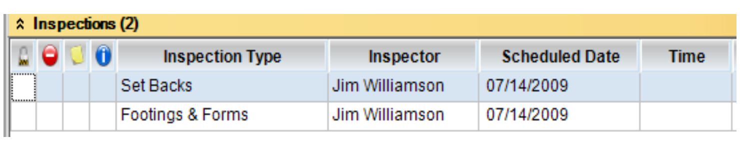


4. Click **OK**.

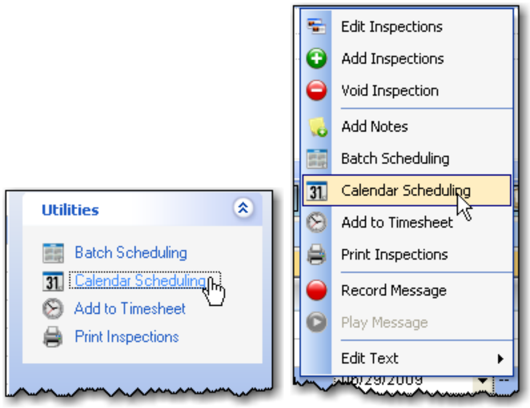
Using the Calendar to Schedule Inspections

To use the calendar function to schedule inspections:

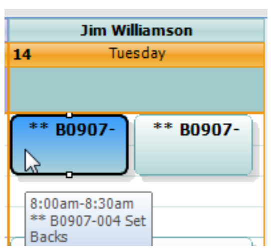
1. Open the **Inspections** panel.



2. In the **Inspections** grid, select the inspection you wish to schedule.
3. Ensure that an inspector is assigned to the inspection and a scheduled date has been selected.
4. To display the inspector's schedule, right-click in the Inspections grid and select **Calendar Scheduling**. Or, in the **Inspections** utilities menu, click **Calendar Scheduling**.



5. The inspection(s) are listed at the beginning of the workday if they are not scheduled for a specific time (e.g., 8:00 a.m.).
6. An inspection item can be dragged and dropped to another date or another authorized inspector's calendar.

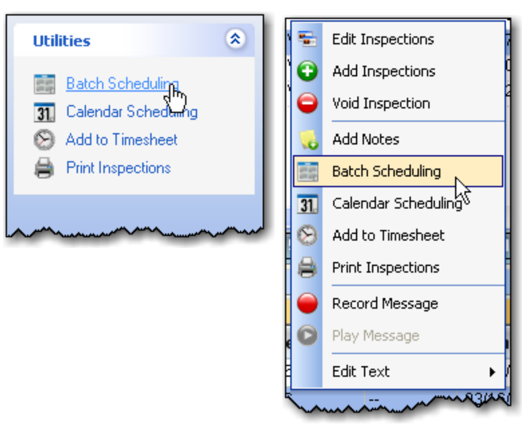


7. Click **Close** to save the changes.

Batch Scheduling Inspections

To schedule inspections for multiple records from a single screen:

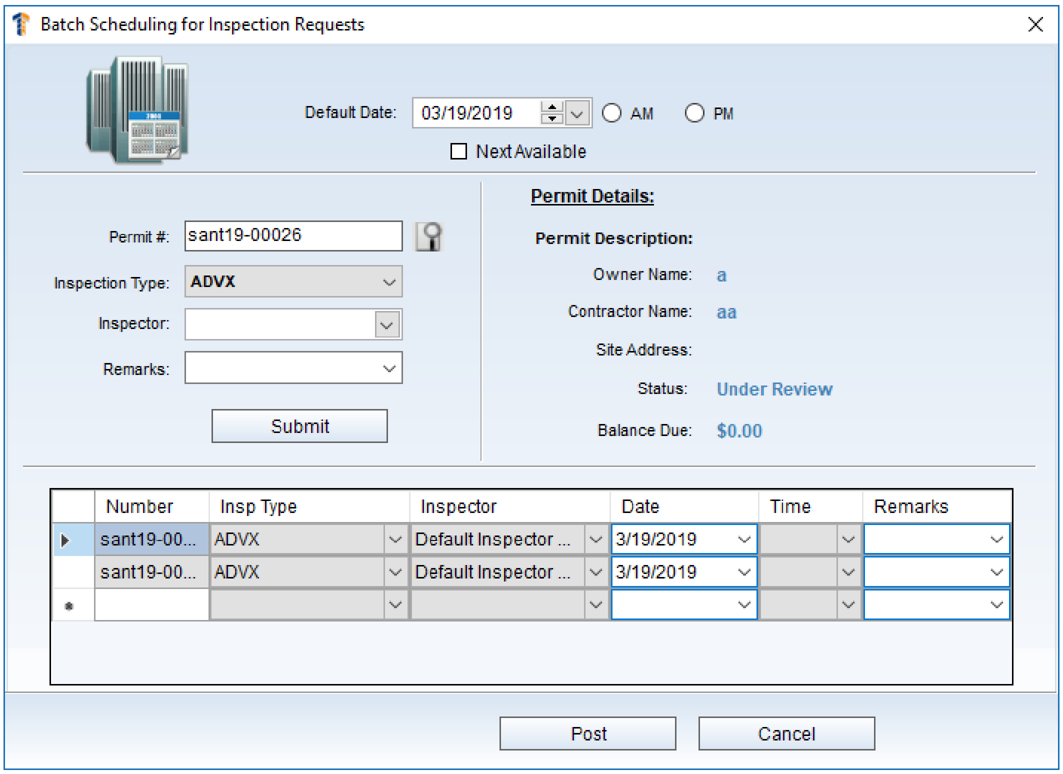
1. Open the **Inspections** panel in PermitTRAK, ProjectTRAK, or CodeTRAK.
2. Right-click in the **Inspections** grid and select **Batch Scheduling**. Or, in the **Inspections** utilities menu, click **Batch Scheduling**.



Tip: Batch Scheduling is also available from the WorkSpace toolbar.

3. Enter a default date and time (optional) to apply to all the inspections.

4. Enter the permit number and press the Tab key or click Search ( ).
5. Validate the permit using the **Permit Details** information.
6. Select the inspection type from the drop-down list.
7. (Optional) Select the inspector from the drop-down list if not automatically assigned.
8. (Optional) Enter or select remarks from the drop-down list.
9. Click **Submit**. The inspection is added to the grid.
10. (Optional) Inspections in the grid can be edited using the drop-down menus. To delete an inspection, select the inspection and press the Delete key.

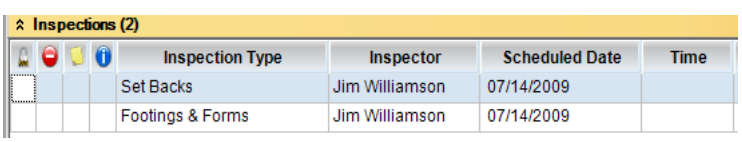


11. Click **Post** to schedule the inspections.
12. (Optional) To view the Inspection Posting Report, select **Printer** or **Display**.

Entering Inspection Results

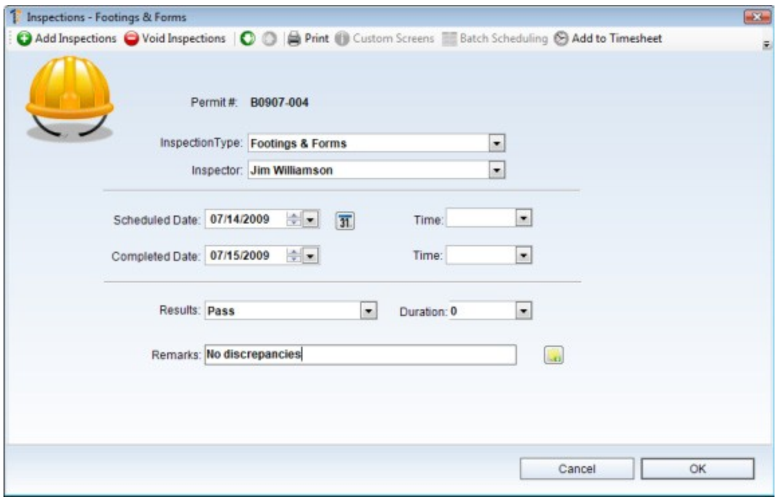
To enter inspection results on a single record in PermitTRAK, ProjectTRAK, CodeTRAK, or LicenseTRAK:

1. Open the **Inspections** panel.



2. Enter the results in the grid or double-click the **Inspection Type** to enter the results in the **Card View**.

3. Enter the results for each completed inspection:
   a. Enter the date/time completed (optional).
   b. Select the result code from the **Results** drop-down list.
   c. (Optional) Enter comments/remarks.
   d. (Optional) Click **Notes** to enter standard notes.



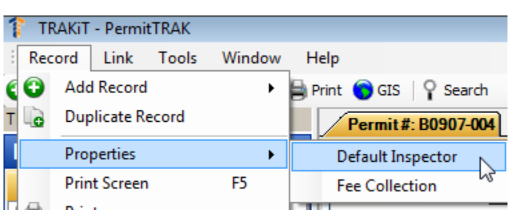
Tip: Depending on your setup, inspection results may trigger automatic re-inspections or re-inspection fees.

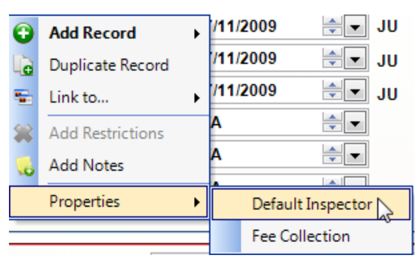
Changing the Default Inspector

Depending on your setup, the default inspector may be assigned by location, by inspection type, when a record is added, or when the first inspection is scheduled. If your inspections are assigned when a record is added or when the first inspection is scheduled, you can change the default inspector, as necessary.

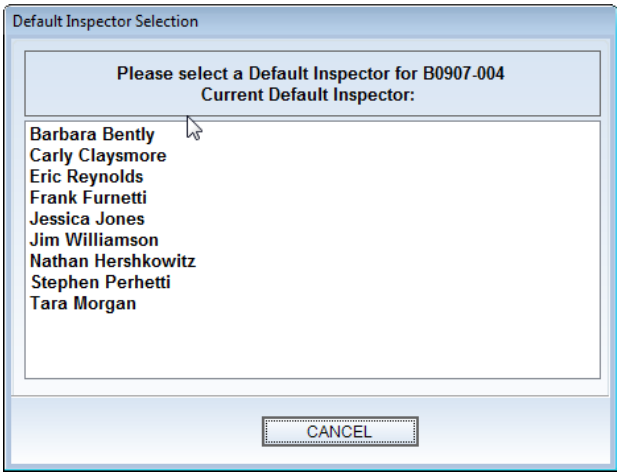
To change the default inspector for a PermitTRAK, ProjectTRAK, or CodeTRAK record:

1. Locate the PermitTRAK, ProjectTRAK, or CodeTRAK record.
2. On the **Record** menu, select **Properties** and click **Default Inspector** or right-click in the main information panel and select **Properties** and click **Default Inspector**.





3. Select the new default inspector from the list.



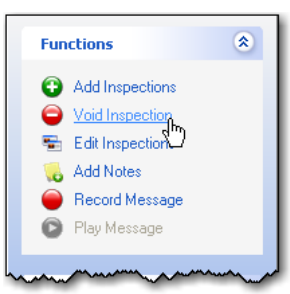
Voiding and Deleting Inspections

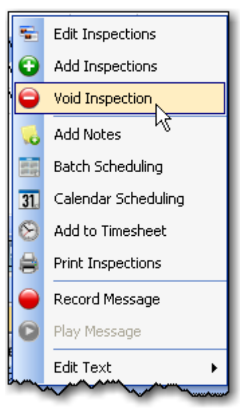
Users can void inspections, not delete them. Only system administrators or users with the Can Delete Inspections privilege can delete inspections.

To void/delete inspections:

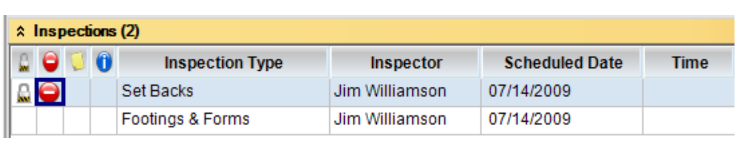
1. Open the **Inspections** panel.

2. In the **Inspections** grid, select the inspection to be voided.
3. Right-click in the **Inspections** grid and select **Void Inspection**. Or in the **Inspections** functions menu click **Void Inspection**.





4. Click **Yes**.
5. The **Void** icon appears next to the voided inspection.



6. To delete the voided inspection (requires a user privilege), click **Delete I**tem from the **Inspections** function menu.
7. Click **Yes** to confirm the deletion.

Chronology

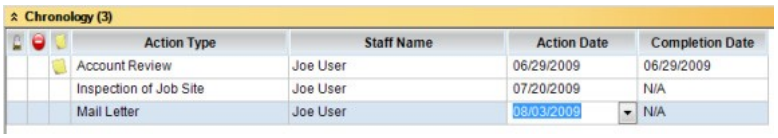
Overview

The **Chronology** panel tracks actions items associated with a record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK.

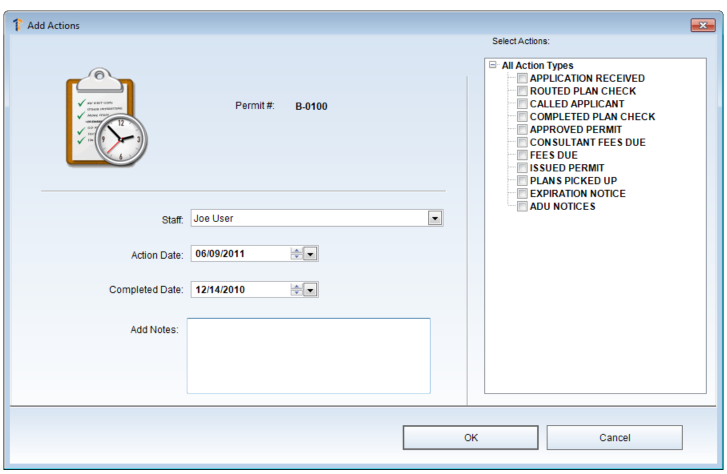
Tracking Action Items

To track actions items on a single record in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK:

1. Open the **Chronology** screen.



2. To add a new action item, right-click in the **Chronology** grid and select **Add Actions**. Or in the **Chronology** functions menu click **Add Action**.
3. To enter activity details for an action item:
   a. Select the action type(s) to track.
   b. Select the staff member responsible for completing the action from the drop-down list. The action items are added to the staff member's WorkSpace.
   c. Enter the action date.
   d. Enter a completion date (optional).
   e. Enter notes.
   f. Click **OK**.



Tip: When the **Chronology** screen is open, press the F5 key to print an Activity History Report for the current record.

Using the Event Scheduler

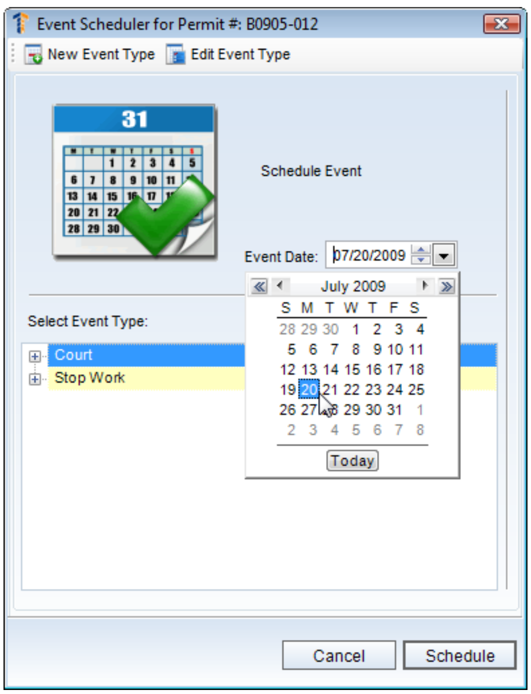
The Event Scheduler feature automatically schedules action items that are prerequisites for a major event. The due dates of prerequisite action items are calculated based on the target date for the major event.

For example, if you want to a schedule a public hearing for April 1, but the hearing requires a staff meeting 30 days prior to it and a public notice 15 days prior to it, the public hearing event scheduler adds a staff meeting on March 1 and a public notice on March 15.

Tip: This feature must be set up by a system administrator.

To use the Event Scheduler in PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or AEC TRAK:

1. Open the **Chronology** screen.
2. Right-click in the **Chronology** grid and select **Schedule Events**. Or in the **Chronology** functions menu click **Schedule Events**.
3. Select the date of the **Event**.
4. Select an **Event Type** from the list.



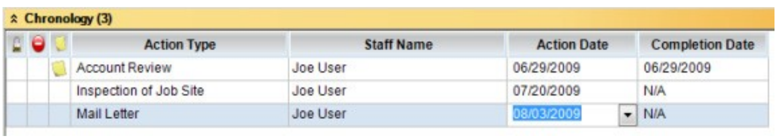
5. Click **Schedule** to confirm the event date and type.
6. Click **Yes** to confirm the event.
7. All actions associated with the event type is inserted automatically into **Chronology**.

Voiding and Deleting Action Items

Users who do not have the Can Delete Chronology privilege can void action items but not delete them in PermitTRAK, ProjectTRAK, and CodeTRAK. Only system administrators or users with the Can Delete Chronology privilege can delete PermitTRAK, ProjectTRAK, and CodeTRAK action items. In LicenseTRAK and AEC TRAK, actions can be deleted, not voided. Users can delete LicenseTRAK and AEC TRAK action items.

To void and delete action items:

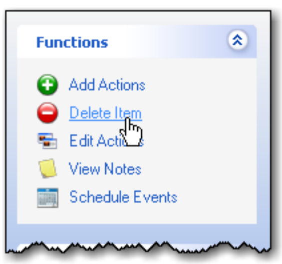
1. Open the **Chronology** screen.
2. In the **Chronology** grid, select the action to be voided.



3. Right-click in the **Chronology** grid and select **Void Action**. Or in the **Chronology** functions menu click **Void Action**.

Tip: In LicenseTRAK and AEC TRAK, click **Delete an Action**, and then click **Yes** to confirm the deletion.

4. Click **Yes**.
5. To delete the voided action item (requires a user privilege), click **Delete Item**.



6. Click **Yes** to confirm the deletion.

Violations

Overview

TRAKiT manages code enforcement violations through the Violations feature. Depending on your setup, CodeTRAK handles violations in one of two ways: a single violation per case record or multiple violations per case record.

To use the Violations feature:

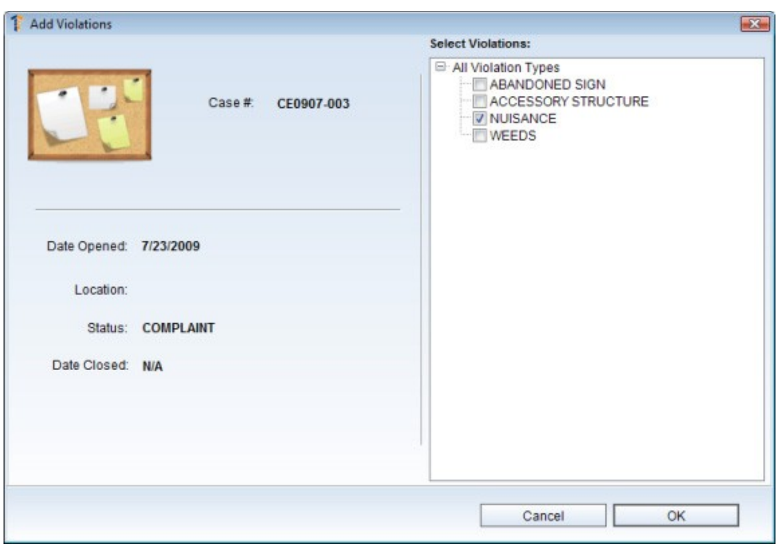
If your setup allows…	see…
exactly one violation per case record	Tracking a Violation (Single)
multiple violations per case record	Tracking Violations (Multiple)

Tracking a Violation (Single)

Tip: This procedure only applies if your system setup allows exactly one violation for a single case record. If your setup allows multiple violations per case record, see "Tracking Violations (Multiple)."

To track a violation on a case record:

1. Locate the case in CodeTRAK.
2. Open the **Violations** panel.
3. To add a new violation, right-click in the **Violation** panel and select **Add Violation**. Or in the **Violations** functions menu click **Add Violation**.
4. Select the violation from the list.



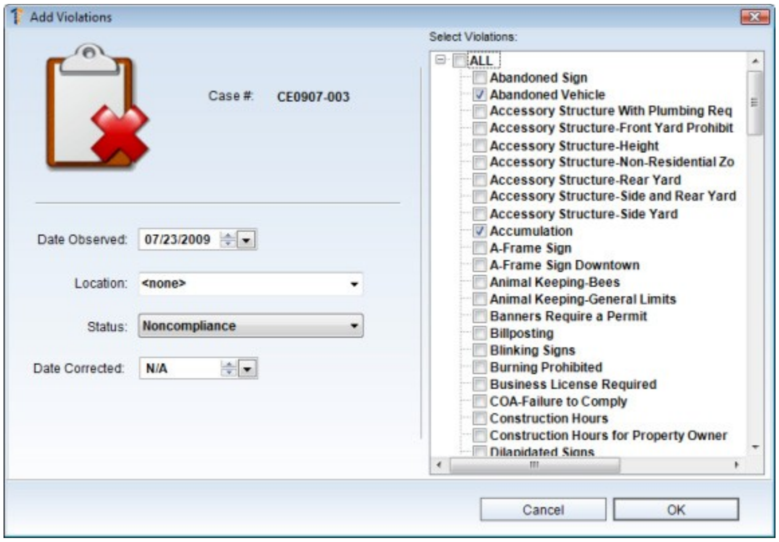
5. Click **OK**.
6. Edit the violation description as necessary.

Tracking Violations (Multiple)

Tip: This procedure only applies if your system setup allows multiple violations for a single case record. If your setup allows exactly one violation per case record, see “Tracking a Violation (Single).”

To track violations on a case record:

1. Locate the case in CodeTRAK.
2. Open the **Violations** panel.
3. To add a new violation, right-click in the **Violation** panel and select **Add Violation**. Or in the **Violations** functions menu click **Add Violation**.
4. Select the violation or violations to add to your case and click **OK**.



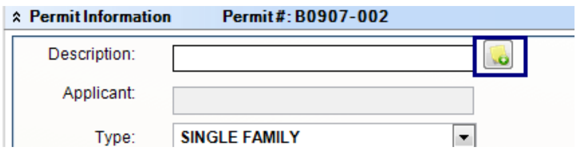
5. Enter the details about the violations in the grid:
   a. Enter the date corrected.
   b. Select a status for the violation.
   c. Enter comments/remarks.
6. Enter location information (optional).
7. Click **OK**.

Description

The **Description** screen allows you to add a longer description to a PermitTRAK, ProjectTRAK, CodeTRAK, or AEC TRAK record.

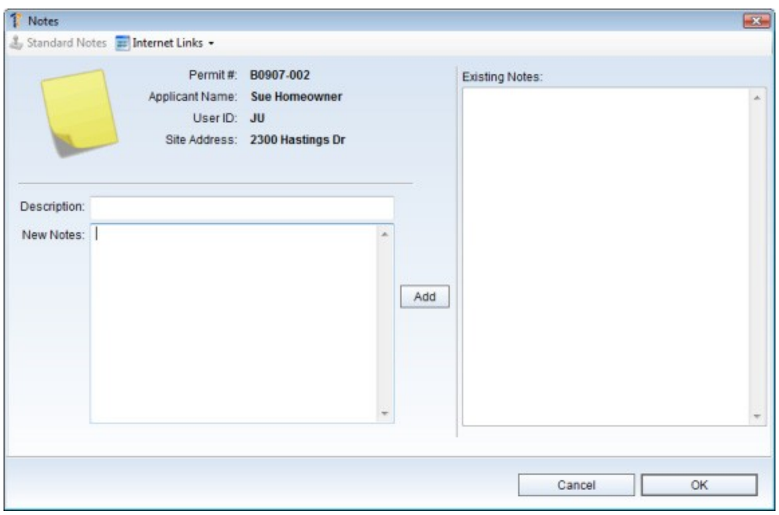
To use the **Description** screen:

1. Locate the PermitTRAK, ProjectTRAK, CodeTRAK, or AEC TRAK record.
2. From the application main panel, click the Description button ( ).



Tip: The green plus on the button indicates that a description has not been entered on this record. After a description is entered, the green plus is removed from the sheet of paper icon.

3. Enter or edit your description in **New Notes** field.
4. Click **Add** to add a time stamp to your description.



5. Click **OK**.

Tip: Press F7 from the description field to check your spelling.

Conditions

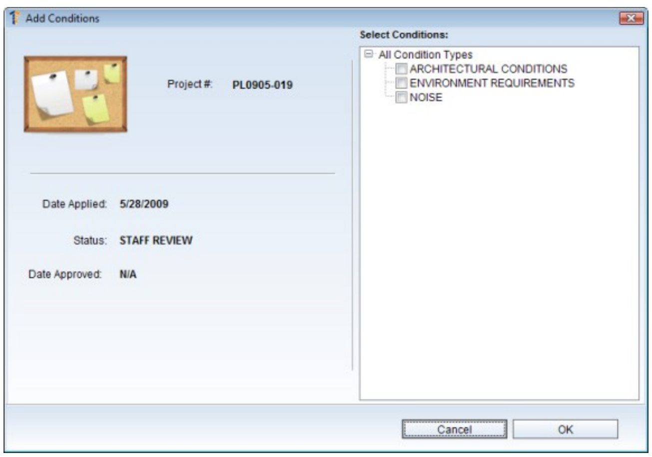
The Conditions feature allows you to track conditions imposed on a PermitTRAK, ProjectTRAK, or LicenseTRAK record. Conditions can be entered manually or using standard text (requires setup by a system administrator) and can be edited for each record, as necessary. PermitTRAK and ProjectTRAK offer the ability to configure the Conditions feature for either single or multiple conditions. LicenseTRAK has a single condition configuration only.

Single Conditions

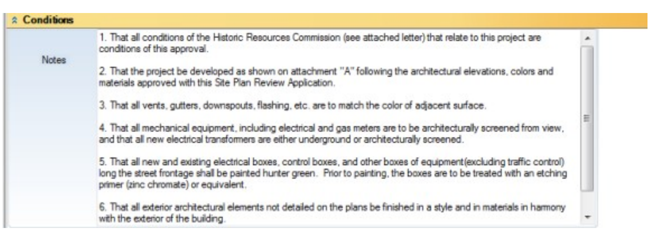
Tip: Single conditions can be merged into documents or reports.

To add conditions to a permit, project, or business record:

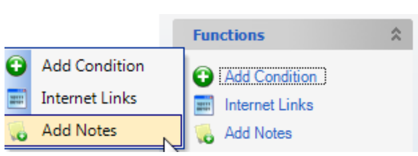
1. Locate the record in PermitTRAK, ProjectTRAK, or LicenseTRAK.
2. Open the **Conditions** panel.
3. To insert standard text, right-click and select **Add Condition** or in the **Conditions** function menu select **Add Condition**.
4. Select a conditions category or categories from the list and then click **OK**.



5. The standard text appears in the notes field.



6. To add nonstandard conditions, right-click and select **Add Notes** or in the **Conditions** function menu select **Add Notes**.



7. Type in your notes or conditions.

8. Enter or edit the conditions in the **Notes** field, as necessary.

Tip: Press F7 from the description field to check your spelling.

Multiple Conditions

To add conditions using the multiple conditions configuration:

1. Right-click in the **Conditions** panel and select **Add Condition**. Or in the **Conditions** functions menu click **Add Condition**.

2. Select one or more conditions.
3. (Optional) Add a date required.
4. (Optional) Add a date satisfied.
5. (Optional) Select a department.
6. (Optional) Select a status.
7. Click **OK**.

To void a condition:

1. Select a condition.
2. Right-click in the **Conditions** panel and select **Void Condition**. Or in the **Conditions** functions menu click **Void Condition**.
3. Click **Yes** to mark the condition as voided.

Tip: Users who do not have the Can Delete Conditions privilege can void conditions but not delete them.

To edit an existing condition:

1. Select the condition.
2. Right-click in the **Conditions** panel and select **Edit Condition**. Or in the **Conditions** functions menu click **Edit Condition**.
3. Update information as required.
4. Click **OK**.

Tip: Notes associated with a condition are accessed either through the **Edit Condition** screen or by right-clicking in the **Conditions** panel and selecting **Edit Notes**. Or in the **Conditions** functions menu by clicking **Edit Notes**.

Tip: Custom screens are available through the multiple conditions configuration.

CRM TRAK

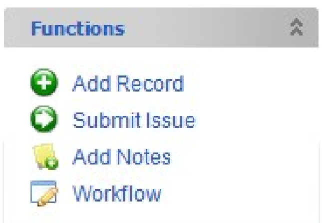
Overview

CRM (Citizen Response Management) TRAK provides the tools to efficiently and effectively manage citizen issues. It allows users to monitor open or closed issues, locations with recurring issues and contains built-in workflow tracking.

Issues

To add an issue:

1. Open CRM TRAK.
2. Click **Add Record**.



3. Select a record type.
4. Select a prefix.

   Note: This selection is not required for some configurations.
5. Click **OK**.
6. Enter the detailed information relating to the issue in the following fields:
   a. Title—if no title is entered when the issue is submitted, TRAKiT automatically enters the issue type and the address of the issue location in this field
   b. Notes
   c. Category
   d. Created Via
   e. Issue location
   f. Complainant information
   g. Description
7. Click **Submit Issue**.

To add a log entry:

1. Open the **Log & History** pane.
2. Click **Add Entry**.
3. Enter **Notes**.

   Tip: Press F7 to spell check your entry.
4. Click **OK**.

To enter an issue resolution:

1. Open the **Description & Resolution** pane.
2. Enter the resolution in the **Resolution** section.

To link an issue to a LandTRAK record:

1. Click Link to LandTRAK ( ) in either the **Issue Information** or **Complainant Information** areas.
2. Enter the address of either the issue location or complainant location.
3. Click **Search**.
4. Double-click on the property record.

Tip: Click the Assessor PIN link to open the linked LandTRAK record in a separate tab.

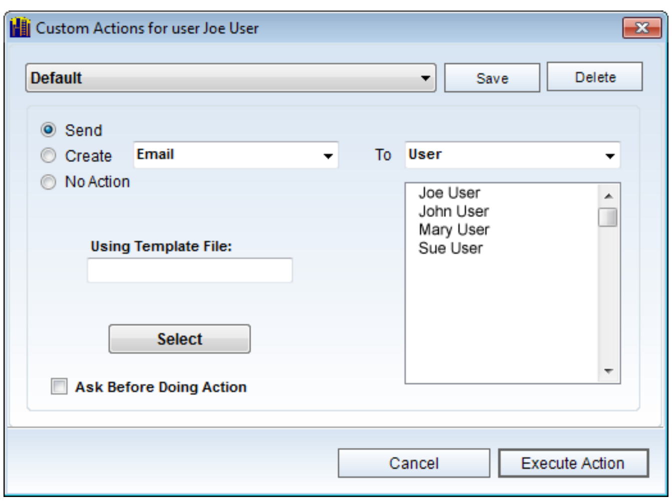
To link an issue to a different LandTRAK record:

1. Click Link to LandTRAK ( ) in either the **Issue Information** or **Complainant Information** areas.
2. Enter the new address of either the issue location or complainant location.
3. Click **Search**.
4. Double-click on the property record.

Workflow

To send a predefined email:

1. Click **Workflow** in the **General Information** pane.
2. Select **Send**.
3. Select email.
4. Click **Select**.
5. Select the email template.
6. Select either **User**, **Complainant**, or **Subject of Complaint**. If you select **User**, select all TRAKiT users from the list that you want receive the email.



7. Click **Execute Action**.

To send a predefined letter:

1. Click **Workflow** in the **General Information** pane.
2. Select **Send**.
3. Select letter.
4. Click **Select**.
5. Select the letter template.
6. Click **Execute Action**.

To add a PermitTRAK, ProjectTRAK, or CodeTRAK record:

1. Click **Workflow** in the **General Information** pane.
2. Select **Create**.
3. Select **Permit**, **Project**, or **Case**.
4. Select a prefix.
5. Select a type.
6. Click **Execute Action**.

Tip: To save an activity definition, configure an email, letter, or record (as outlined previously), then click **Save**, and enter a title for the activity. The new activity is added to the drop-down list.

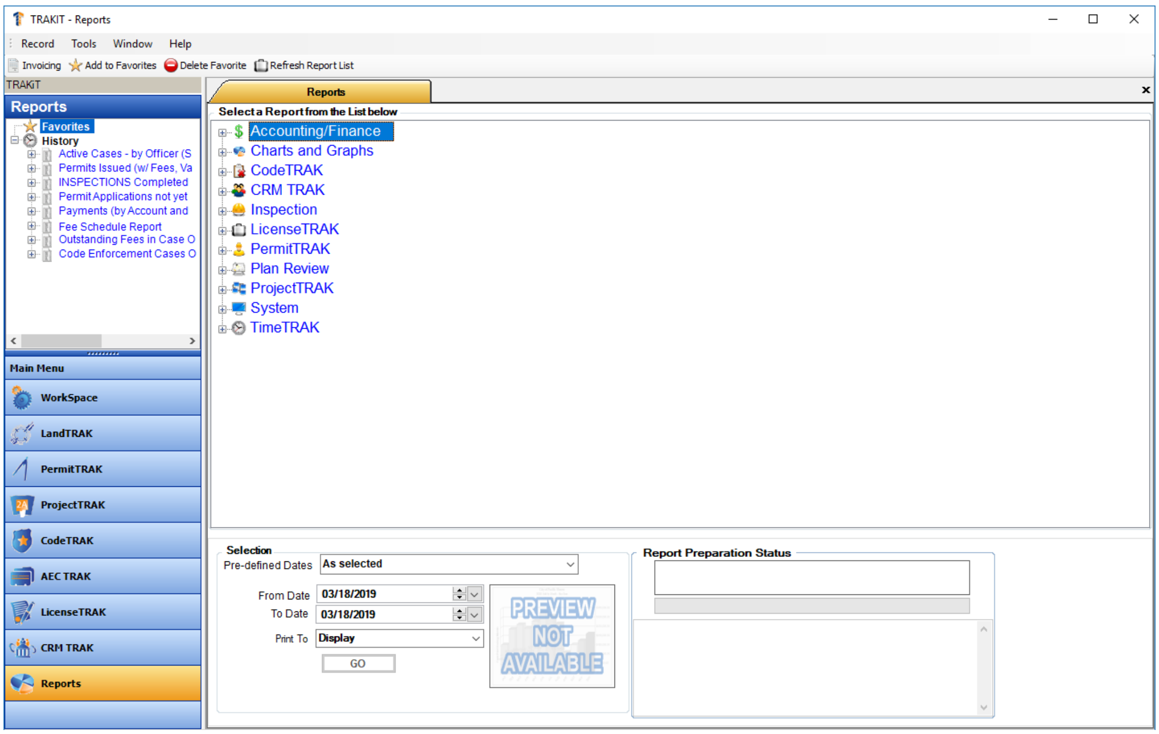
Tip: To delete a saved activity, select the activity from the drop-down list and click **Delete**.

Reports

Overview

TRAKiT includes many standard reports to meet your reporting needs. TRAKiT reports are dynamic, allowing you to specify the type, application, date/time, or any other pertinent information to include in a report or chart.

Additionally, custom reports can be created using Crystal Reports. Reports are organized by activity or application and are accessed by clicking **Reports** on the TRAKiT main screen or module menu.

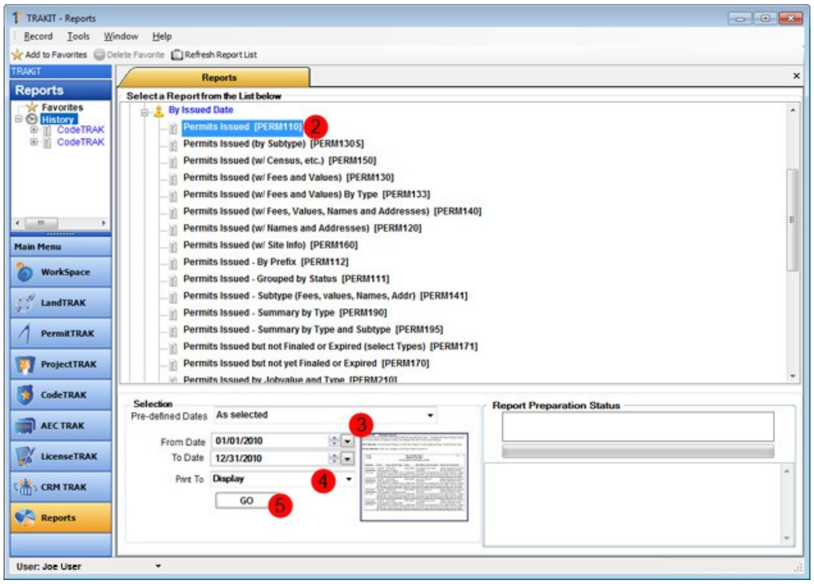


Running Reports

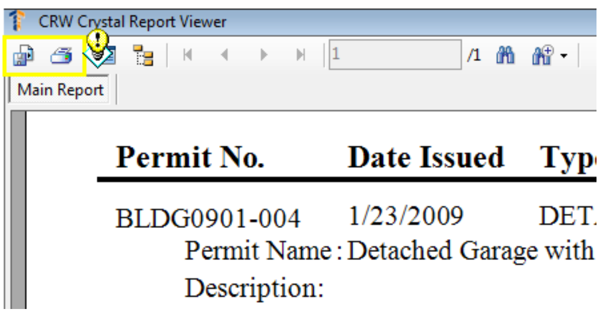
To run a report:

1. From the TRAKiT main screen, click Reports or click the Reports button on the module menu.
2. Select the report you wish to run. To expand a category, click the plus sign or double-click the category name.

   Tip: Click **Sample Report** for more information about a report.
3. Select a date range from the **Pre-defined Dates** drop-down list or enter from date and to date.
4. Select whether to send the report directly to the printer or to preview it in the display window.
5. Click **GO** or right-click on the report and select either **Display Report** or **Print Report**.



Tip: If you choose to preview your report, you can click the print ( ) button to print the report or the export ( ) button to export the report from the report viewer.



Tip: The report preview can be disabled by selecting **Disable Report Preview** in **User Preferences**, **Database Check**.

Exporting a Report

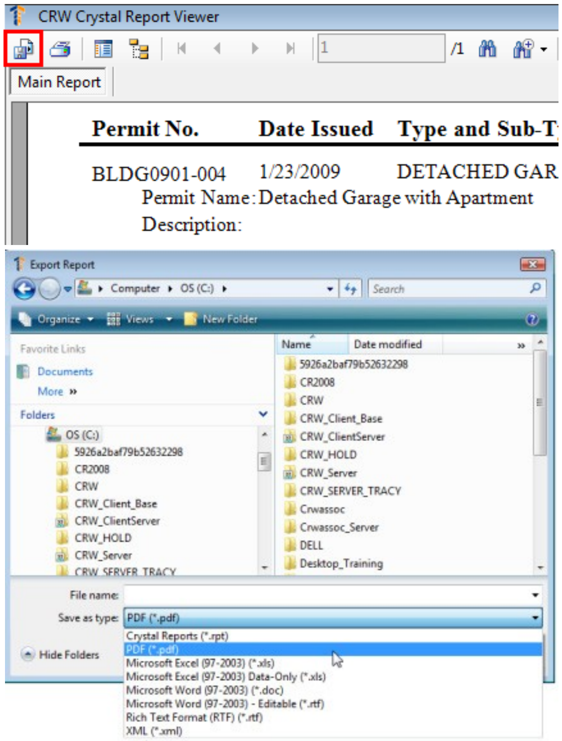
You can export a report (save a TRAKiT report in a specific file format) using the file conversion utility in Crystal Reports.

To export a report:

1. Run the report with **Display Window** as the report destination.
2. Click the Export ( ) button.
3. Select the file format with which you wish to save your report:
   - Acrobat (PDF)
   - Microsoft Excel
   - Microsoft Word
   - Crystal Report (RPT)
   - Rich Text Format

- XML

4. Select a destination for the file.



5. Click **OK**.

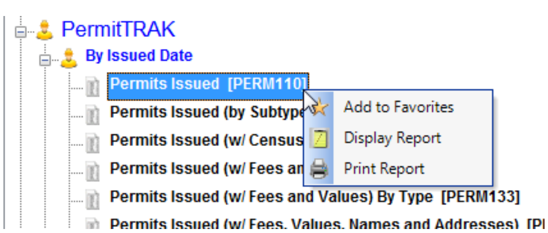
Tip: When you run a report in TRAKiT, a temporary Microsoft Access database containing your report data is created in the TRAKiT\Temp_files directory of your computer.

Favorite Reports

The **Report Favorites** tab provides the ability for the user to create a unique grouped list of TRAKiT reports. Reports can be added to the favorites list from either the Reports module or the **User Preferences** screen.

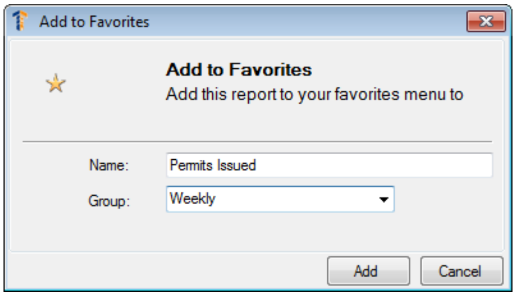
To add a report to the **Favorites** tab:

1. Open the **Reports** module.
2. Select the report you want to add to the favorites list.
3. Right-click on the report.
4. Click **Add to Favorites**.



5. Enter your title for the report.

6. Enter or select a group.



7. Click **Add**.

To remove a report from the favorites tab:

1. Open the **Reports** module.
2. Select the report you want to remove from your favorites list.
3. Right-click on the report.
4. Select **Remove Favorite**.
5. Click **Yes** to confirm removal of the report from your favorites list.

Supporting Features & Functions

Many programmatic features and functions support multiple applications and screens in TRAKiT:

- Restrictions
- Using Notes
- TimeTRAK
- Trust Accounts
- Internet and Imaging Links
- Using Keyboard Shortcuts
- Using Spell Check
- Text Messaging
- Copy TRAKiT Record Number to Clipboard

Restrictions

The Restrictions function flags essential property information in multiple TRAKiT applications. This feature allows other departments to view important information, such as whether a property is in a flood zone, on a fault line, or in a historical district, before issuing a permit, project, case, or license. Restrictions can be configured by System Administrator to display either single or multiple restrictions.

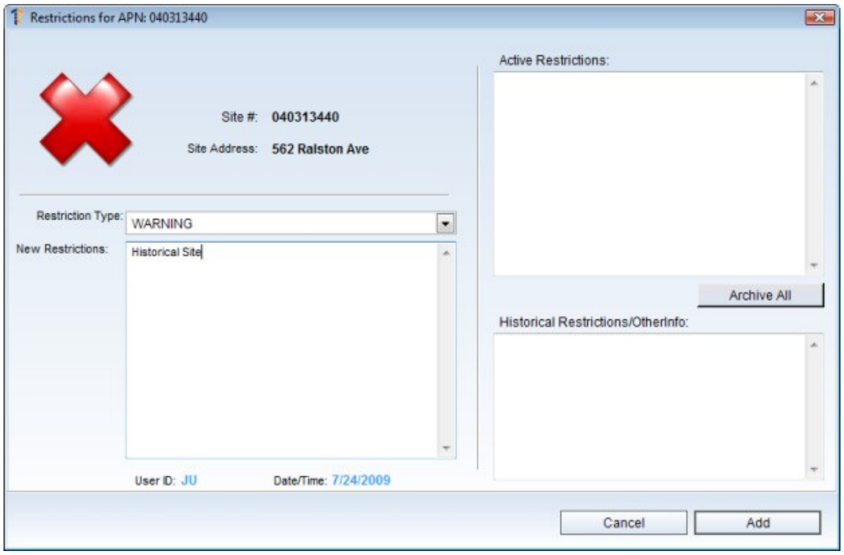
Adding Restrictions to a Property

To add restrictions to a property record:

1. Locate the property in LandTRAK.
2. To add a restriction, right-click in the **Site Information** panel and select **Add Restrictions** (single restrictions configuration). Or open the **Restrictions** pane and either click **Add Restriction** on the functions menu or right-click and select **Add Restriction** (multiple restriction configuration).

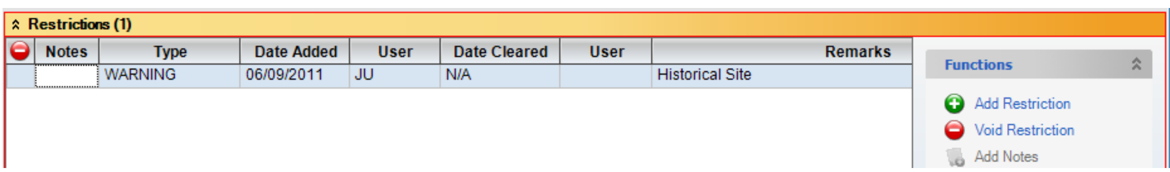
For single restriction configuration:

1. Select the **Restriction Type** from the drop-down list.
2. Enter your restrictions in the **New Restrictions** field. Click **Add** to add a time stamp to your comments.



Tip: To remove a restriction, set the **Restriction Type** to **None** and click the **Archive All** button.

For multiple restriction configuration:



1. Select the restriction type from the drop-down list.
2. Enter remarks.
3. (Optional) Add notes.

Tip: To clear a restriction, enter the date cleared. The user ID of the individual clearing the restriction is automatically entered. Cleared restrictions do not display the restriction icon.

A restrictions icon (Restrictions) appears on the LandTRAK **Site Information** panel and on any permit, project, code, business, and issue records that are linked to the property record.

Viewing Restrictions

To view restrictions on a property from PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK, or CRM TRAK:

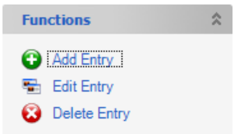
1. Locate a record that is linked to the property.
2. Click the restrictions icon (Restrictions) on the record's information panel.
3. A **Restrictions Information** window displays the active (noncleared) restrictions for the property.

Maintenance Log

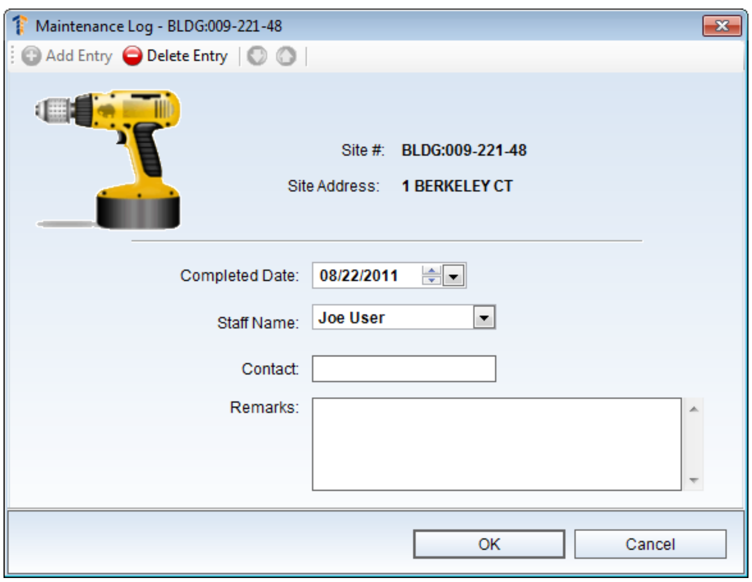
The maintenance log provides the TRAKiT user with the ability to record activities that occur on a specific geo record. The log has the ability to record the activity date, staff member that performed or observed the activity, a local contact name, and remarks.

To add an activity to the maintenance log:

1. Open the **Maintenance Log** panel.
2. Right-click in the **Maintenance Log** panel and select **Add Entry**. Or in the **Maintenance Log** functions menu click **Add Entry**.



3. Complete the activity information:
   - Completed Date—date the activity was finalized.
   - Staff Name—select the staff name from the drop-down list.
   - Contact—enter the name of a local contact.
   - Remarks—enter any notes or remarks.



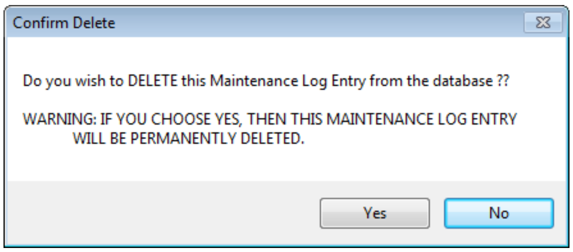
4. Click **OK**.

To edit a maintenance log activity:

1. Open the **Maintenance Log** panel.
2. Select the activity to edit.
3. Right-click in the **Maintenance Log** panel and select **Edit Entry**. Or in the **Maintenance Log** functions menu click **Edit Entry**.
4. Edit the entry items as required.

To delete a maintenance log activity:

1. Open the **Maintenance Log** panel.
2. Select the activity to delete.
3. Right-click in the **Maintenance Log** panel and select **Delete Entry**. Or in the **Maintenance Log** functions menu click **Delete Entry**.
4. Click **Yes** to confirm deletion.

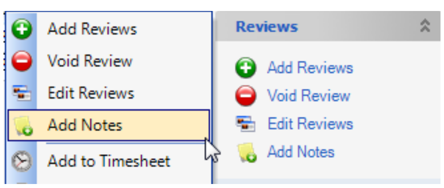


Using Notes

Notes provides an unlimited length, text field to enter any conditions or comments pertaining to reviews or inspections. The notes icon ( ) indicate that there are notes associated with the review or inspection.

To use the Notes feature:

1. Open the Reviews screen (PermitTRAK, ProjectTRAK, LicenseTRAK) or the **Inspections** screen (PermitTRAK, ProjectTRAK, CodeTRAK, LicenseTRAK).
2. Select the review or inspection to which you are adding notes.
3. To add a note, right-click **Reviews** or **Inspections** panel and select **Add Notes**. Or in the **Reviews** or **Inspections** functions menu click **Add Notes**.



4. Enter notes pertaining to the review or inspection:
   - To enter standard notes, click **Add Standard Notes** and select one or more of the predefined comments.

     Tip: The standard notes list must be set up by a system administrator.
   - To manually enter a comment, enter your comments in the **New Notes** field, click **Add**, and then click **OK**.

     Tip: Spell check your notes before you close the screen.

     Tip: You cannot edit your notes after you click **Add** unless you have the Can Edit Notes user privilege.

TimeTRAK

TimeTRAK provides the capability to record the amount of time spent on a review, inspection, or activity and asses a fee based on the users established rate for that activity.

The TimeTRAK process:

1. Enter time for an activity.
2. Validate recorded entries.
3. Post activities.

To enter time for an activity:

1. Right-click on the activity (Inspection, Review, or Chronology Activity) and select **Add to Time Sheet**. Or in the functions menu click **Add to Time Sheet**.
2. Enter the amount of accumulated time spent on the activity (e.g., 1, 1.25, 2.5, 8, and so on).

   Tip: Only one TimeTRAK entry is allowed per activity.
3. Click **OK**.

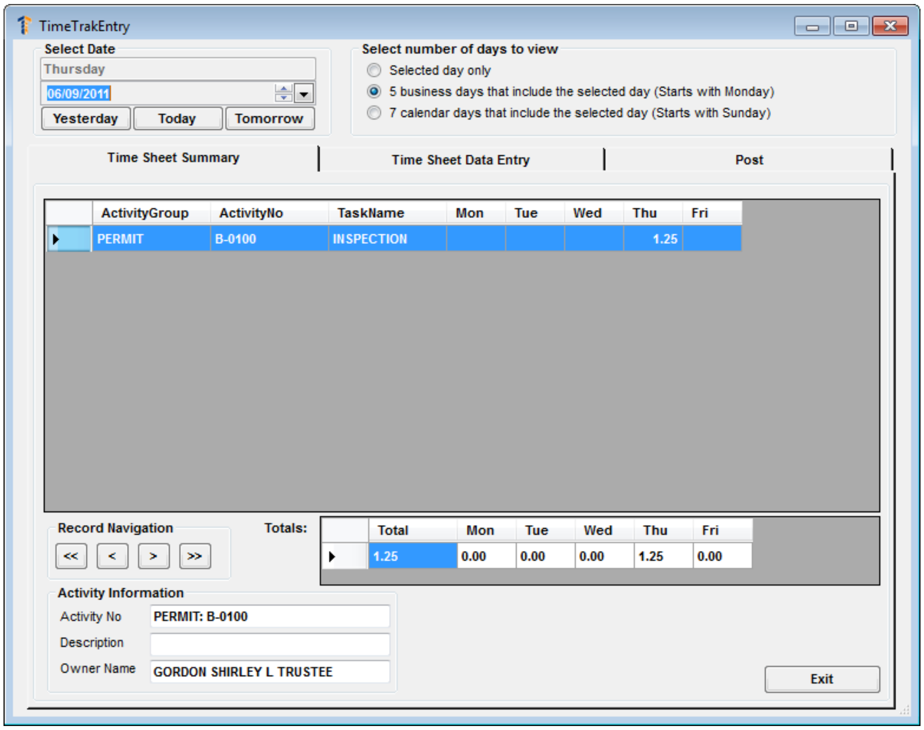
TimeTRAK Entry Screen

Access the TimeTRAK Entry screen by pressing F8 or selecting **Time Sheet** from the **Tools** menu on the toolbar.

The TimeTRAK Entry screen is divided into three tabs: Time Sheet Summary (default), Time Sheet Data Entry, and Post.

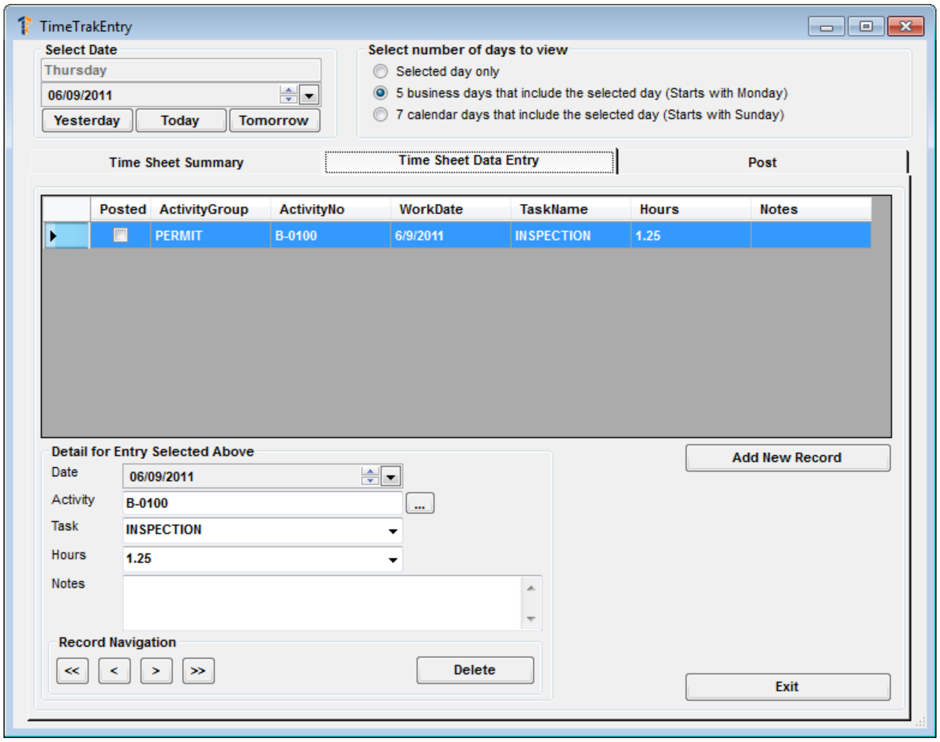
- The **Time Sheet Summary** tab provides a list of all recorded activities based on the selected time frame.
- The **Time Sheet Data Entry** tab provides the user the ability to add, edit, or delete recorded entries.
- The **Post** tab allows the user or System Administrator to post or apply the recorded activities to the appropriate records.

  Note: This is the function that generates a fee and applies it to the record.



To display a list of recorded activities:

1. Select the beginning date either by manually entering the date or using the calendar feature. There are also three buttons (**Yesterday**, **Today**, and **Tomorrow**) that allow you to automatically set the date based on the current date.
2. Set the date range by selecting one of the options from **Select number of days to view**.
3. All recorded activities are displayed.
4. Use the **Record Navigation** buttons or click on an item in the grid to display the details of the activity.



To add an activity:

1. Click **Time Sheet Data Entry** on the **TimeTRAK Entry** screen.
2. Click **Add New Record**.
3. Either manually enter the date of the activity or use the calendar feature.
4. Enter the complete record number (permit number, project number, or case number) or search for the record using the ellipsis (...) button.
5. Select a task.
6. Select or enter the time spent on the activity.
7. Add notes.

To modify a recorded time entry:

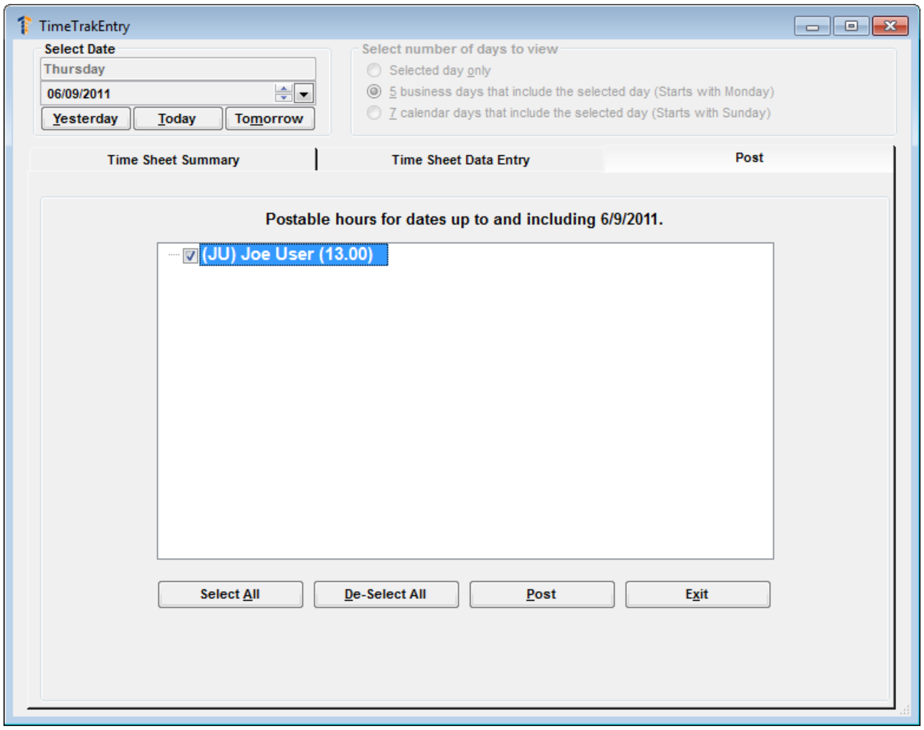
1. Click **Time Sheet Data Entry** on the **TimeTRAK Entry** screen.
2. Select the record using the **Record Navigation** buttons or click on an item in the grid.
3. Modify the record by changing a value in the **Detail for Entry Selected Above** section.

After all the entries are added and validated, either the user or System Administrator posts the entries to their associated record.

Tip: Use **Delete** to remove an erroneous entry.

To post activities:

1. Click **Post** on the **TimeTRAK Entry** screen.
2. Select the user account to post.



Note: Users are only allowed to post their own account. System Administrators have the ability to post all user accounts.

3. Click **Post**.

Trust Accounts

Trust Accounts are an additional payment source that can be created for an AEC TRAK record. The feature allows for a company or individual to place on deposit a sum of money that can then be used to pay for fees in any TRAKiT module.

To add a trust account:

1. Open or add an AEC TRAK record.
2. Right-click in the **Company Information** pane and select **Create Trust Account**. Or in the **Company Information** functions menu click **Create Trust Account**.
3. Click **Yes** to confirm. The trust account number is a combination of the prefix CTA (Contractor Trust Account) and the AEC TRAK registration number.

To deposit money into the trust account:

1. Open the AEC TRAK record.
2. Right-click in the **Company Information** pane and select **Trust Account**. Or in the **Company Information** functions menu click **Trust Account**.
3. Click **New Entry** on the **Trust Account Details** screen.
4. Enter the transaction details:
    - Paid By—Company or person’s name making the deposit.
    - Amount—Amount of the transaction.

- Pay Method—Method of payment (i.e., cash, check, charge etc.). For check and charge, enter the check number and for charge, enter the credit card authorization number.
- Date—Transaction date.
- (Optional) Receipt Number—Used to enter the receipt number for the transaction from a point-of-sale system or receipt book.
- Description—Enter a description of the transaction (i.e., deposit).

5. Click **OK**.

Tip: Every transaction that effects the trust account is recorded in the **Trust Account Details** screen.

Internet & Imaging Links

Links to frequently used websites—such as contractor licensing, building codes, state or county ordinances, or document imaging systems—can be accessed directly from TRAKiT via the **Internet Links** or **Imaging Links** buttons. Default web links must be set up by a system administrator. Users can also define their own favorite unique web links.

1. Access internet links or imaging links by clicking the **Internet Links** ( ) or **Imaging Links** ( ) buttons on the toolbar. This will display a list of both system administrator and user-defined links.
2. Click on a title.
3. The site opens in a browser window.

   Tip: If your web links open in a separate browser, you can leave the website open when the TRAKiT record is closed.

   Tip: Your system administrator may configure your web links to include TRAKiT data in the website address. For example, your LandTRAK links may be configured to open directly to information about the current parcel number.

   Tip: Imaging Links allow access to web-enabled Document Imaging Systems (e.g., Laserfiche).

Using Keyboard Shortcuts

The following keyboard shortcuts are available in TRAKiT:

Key	Function	Description
F1	Help	Press F1 from any screen to open a help topic about the current screen (Requires internet access).
F2	WorkSpace	Press F2 to open WorkSpace.
F3	Logout/Change TRAKiT User	Press F3 to switch users (logon required) or to end your current session.

Key	Function	Description
F5	Screen Print	• Press F5 from the **Chronology** screen to print an Activity History Report for the current record. • Press F5 from the **Reviews** screen to print a Review History Report for the current record. • Press F5 from any other screen to print the current screen.
F6	Exit	Press F6 to log off from and close the TRAKiT application.
F7	Spell Check	Press F7 from any text field to spell check your entry.
F8	TimeTRAK	Press F8 to open the TimeTRAK time sheet for the current user.
F12	Reload Admin Settings	Press F12 to reload the TRAKiT administrative settings from TRAKiT Web Utilities and Maintenance.
Ctrl+F1	Show/Hide Side Bars	Press Ctrl+F1 to hide the right side menus. Press CRTL+F1 again to show the right side menus.
Ctrl+F2	Show/Hide Navigation Pane	Press Ctrl+F2 to hide the left side navigation pane (**Tree**, **Site**, and **Browse**). Press Crtl+F2 again to show the left side navigation pane.
Ctrl+F3	Open/Close Active Panel	Press Ctrl+F3 to open or close the active panel (highlighted in gold).
Ctrl+f	Global Search	Press Ctrl+F to open the global search screen.
Common Functions		
Tab		Press the Tab key to navigate between data entry fields.
Ctrl+c		Press Ctrl+c to copy selected text.
Ctrl+v		Press Ctrl+v to paste text from the clipboard.

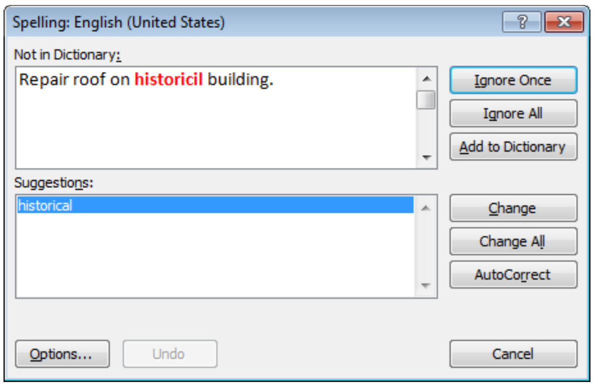
Key	Function	Description
Ctrl+x		Press Ctrl+X to cut selected text.
Ctrl+a		Press Ctrl+A to select all text.
Alt+a		Opens **Add Record** screen.
Alt+b		Opens **Bonds** pane.
Alt+c		Opens **Chronology** pane.
Alt+d		Opens **Conditions** pane.
Alt+e		Opens **Plan Reviews** pane.
Alt+f		Opens **Financial Information** pane.
Alt+G		Places cursor in the **Go To** text entry box.
Alt+h		Displays Help menu.
Alt+i		Opens **Inspections** pane.
Alt+k		Displays **Link** menu.
Alt+l		Displays **Tools** menu.
Alt+m		Opens email screen.
Alt+N		Displays **Recent** list.
Alt+o		Opens **Contacts** pane.
Alt+p		Opens **Print** screen.
Alt+r		Displays **Record** menu.
Alt+s		Opens **Search** screen.
Alt+t		Opens **Attachment** screen.
Alt+u		Opens **Custom Screen** pane.
Alt+v		Opens **Valuations** pane.
Alt+w		Displays **Window** menu.

Using Spell Check

You can perform a spelling check in any text field in TRAKiT using the Spell Check feature.

To use the Spell Check:

1. Press F7 from the text field you wish to check.
2. When Spell Check finds a possible spelling problem:
   - To replace the word, select a replacement from the suggestions list or type the correct word in the field above the suggestions list, and then click **Change**, **Change All**, or **AutoCorrect**.
   - To ignore the word and continue the spell check, click **Ignore Once** or **Ignore All**.
   - Click **Add to Dictionary** to add unique spelling to your personal MS Office dictionary.



Text Messaging

Text messages can be sent directly from TRAKiT to any cell phone or pager that has text messaging capability.

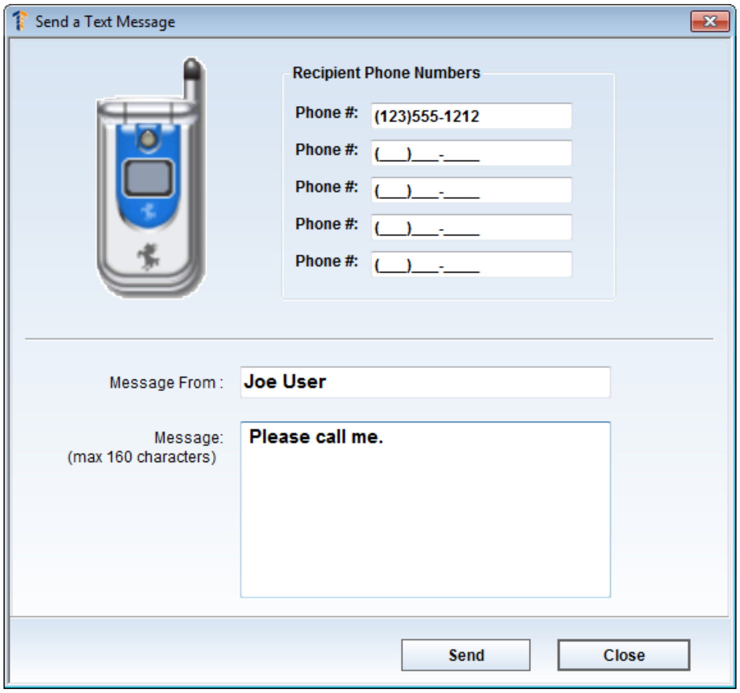
Tip: The text messaging function in TRAKiT requires a third-party service. Contact the Support team for more information regarding an interface with your system.

To send a text message from TRAKiT:

1. Press F4 from any screen, right-click on a cell phone number and click **Send Text Message**; or click **Send Text Message** from the **Utilities** menu.
2. Enter the cell phone or pager number(s) to which you wish to send a message.

Tip: The recipient’s phone number is automatically populated when you use the **Send** button under **Contacts**.

3. Enter the message you wish to send.
4. Click **Send**.



Copy TRAKiT Record Number to Clipboard

To copy the active record number to the operating system's clipboard:

1. Right-click on the active tab of a LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, LicenseTRAK, or CRM TRAK record.
2. Select **Copy to Clipboard**.
3. Use Ctrl+v to paste the contents of the clipboard into another destination (e.g., note, remark, word document, TRAKiT report that requires the record number).