

Virtual Lab

Event Schedule

Enterprise Permitting & Licensing

June 2024 – September 2024

Table of Contents

Virtual Lab Event Schedule	3
Class/Event Descriptions	5
Business License & Civic Access	5
Cashiering Fee Basics & Configuration - Admin	5
Cashiering – End User.....	5
Civic Access – Admin	5
Civic Access – End User	6
Code Enforcement Mobile – Demo VL.....	6
Code Management App & Configuration.....	6
Contact Management.....	6
Custom Fields	7
eReviews Admin – Demo VL.....	7
eReviews – Review Coordinator & Manage My Reviews– Demo VL	7
Inspections Mobile – Demo VL	7
Inspection Configuration.....	8
Inspection Management App.....	8
IO, IAA, & Geo Rules.....	8
Navigation – System Overview with Hub.....	8
Permit Configuration.....	9
Permit Management App.....	9
Plan Configuration.....	9
Plan Management App.....	9
Professional License	9
Standard Review – Manage My Reviews.....	10
System Settings & Global Setups	10
User Setup & User Roles	10
Workflow Basics – End User.....	10
Workflow Basics & Configuration – Admin	10
Tyler University.....	11
APPENDIX A: Certification Tracks.....	12
Civic Access Track.....	12
eReviews Track	12
End User Apps Track	12
Community Development Track	12
System Admin Track.....	12
APPENDIX B: End-user vs. Admin Training.....	13



Virtual Lab Event Schedule

Tyler Technologies offers more than 25 different training opportunities as part of its Enterprise Permitting & Licensing (EPL) Virtual Lab Program. Class registration is available in Tyler University. Please contact liz.anderson@tylertech.com with any questions about the program.

June	Event	Hours	Eastern Time
June 11	Workflow Basics & Configuration – Admin	3	10:30 AM – 1:30 PM
June 13	IO, IAA, & Geo Rules	3	10:30 AM – 1:30 PM
June 17	Navigation – System Overview with Hub	2.5	10:30 AM – 1:00 PM
June 18	Plan Management app	2	10:30 AM – 12:30 PM
June 20	Custom Fields Configuration	3	10:30 AM – 1:30 PM
June 24	Contact Management	2	10:30 AM – 12:30 PM
June 25	Cashiering Fee Basics & Configuration - Admin	3	10:30 AM – 1:30 PM
June 26	Business License & Civic Access	2.5	10:30 AM – 1:00 PM
June 27	Professional License	2	10:30 AM – 12:30 PM
July	Event	Hours	Eastern Time
July 9	Permit Management app	2	10:30 AM – 12:30 PM
July 10	Inspection Management app	2	10:30 AM – 12:30 PM
July 11	Cashiering – End User	2.5	10:30 AM – 1:00 PM
July 16	System Settings & Global Setups	5	11:00 AM – 4:00 PM
July 17	eReviews – Review Coordinator & Manage My Reviews – Demo VL	2.5	10:30 AM – 1:00 PM
July 18	eReviews Admin – Demo VL	5	11:00 AM – 4:00 PM
July 29	Permit Configuration	2	10:30 AM – 12:30 PM
July 30	Inspection Configuration	2.5	10:30 AM – 1:00 PM
July 31	User Setup & User Roles	2	10:30 AM – 12:30 PM
August	Event	Hours	Eastern Time
August 6	Navigation – System Overview with Hub	2.5	10:30 AM – 1:00 PM
August 7	Workflow Basics & Configuration - Admin	3	10:30 AM – 1:30 PM
August 8	IO, IAA, & Geo Rules	3	10:30 AM – 1:30 PM
August 19	Code Management app & Configuration	3	10:30 AM – 1:30 PM
August 20	Custom Fields Configuration	3	10:30 AM – 1:30 PM
August 21	Civic Access – End User	3	10:30 AM – 1:30 PM
August 22	Civic Access – Admin	5	9:00 AM – 2:00 PM
August 26	Contact Management	2	10:30 AM – 12:30 PM



August	Event	Hours	Eastern Time
August 27	Standard Review – Manage My Reviews	2	10:30 AM – 12:30 PM
August 28	Business License & Civic Access	2.5	10:30 AM – 1:00 PM
August 29	Cashiering Fee Basics & Configuration	3	10:30 AM – 1:30 PM
September	Event	Hours	Eastern Time
September 4	Plan Management app	2	10:30 AM – 12:30 PM
September 5	Plan Configuration	2	10:30 AM – 12:30 PM
September 9	Navigation – System Overview with Hub	2.5	10:30 AM – 1:00 PM
September 10	Professional License	2	10:30 AM – 12:30 PM
September 11	Cashiering - End User	2.5	10:30 AM – 1:00 PM
September 12	IO, IAA, & Geo Rules	3	10:30 AM – 1:30 PM
September 16	Workflow Basics – End User	2	10:30 AM – 12:30 PM
September 17	eReviews – Review Coordinator & Manage My Reviews – Demo VL	2.5	10:30 AM – 1:00 PM
September 18	User Setup & User Roles	2	10:30 AM – 12:30 PM
September 19	Custom Fields Configuration	3	10:30 AM – 1:30 PM
September 23	Permit Management app	2	10:30 AM – 12:30 PM
September 24	Inspection Management app	2	10:30 AM – 12:30 PM
September 25	Workflow Basics & Configuration	3	10:30 AM – 1:30 PM
September 26	System Settings & Global Setups	5	9:00 AM – 2:00 PM
September 30	Permit Configuration	2	10:30 AM – 12:30 PM

Virtual Lab schedules are published quarterly on [Tyler Community](#).



Class/Event Descriptions

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

Business License & Civic Access

Length: 2.5 Hours

Intended Audience: Enterprise Permitting & Licensing users who need to understand how customers apply and manage business licenses through Tyler’s public-facing web application, Civic Access.

Description: Instructors explain how a customer submits a business license application in Civic Access. Once a customer applies, jurisdictions use the EPL Business module to manage businesses. In the class, attendees learn how to manage a business and a business license, view attached licenses, create a tax remittance account, and view attached tax remittance accounts from a business record. Attendees also renew a business license and learn to manage the fees associated with a renewal in EPL. Instructors also explain how customers renew a business license in Civic Access.

Cashiering Fee Basics & Configuration - Admin

Length: 3 Hours

Intended Audience: Jurisdiction administrators who are responsible for various components of set up and configuration of Enterprise Permitting & Licensing.

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

Cashiering – End User

Length: 2.5 Hours

Intended Audience: Users who need to understand the Cashiering module in Enterprise Permitting & Licensing. If you click Pay Now inside of EPL, then this class is for you.

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

Civic Access – Admin

Length: 5 Hours

Intended Audience: Jurisdiction administrators who need to understand the administration of Civic Access.

Description: This class is designed for individuals who are responsible for the administration of Civic Access, focusing on how to manage the site configuration options and setting up the online portal to provide customers with access to information. At the end of the training class, students understand the key functional and technical components that are part of Civic Access administration.



Civic Access – End User

Length: 3 Hours

Intended Audience: Enterprise Permitting & Licensing users who need to understand the user experience of the Civic Access online portal and its relationship to EPL.

Description: This class is designed for any EPL user who needs understanding of its integration to Civic Access. Attendees learn how to navigate through a sample Civic Access site and perform various activities, such as applying for a permit. Instructors also explain the Civic Access account registration process and how it links to related records in EPL. Students have access to EPL during this virtual session so they can perform and witness data updates between applications in real time.

Code Enforcement Mobile – Demo VL

Length: 1.5 Hours

Intended Audience: Users who need to understand the Code Enforcement Mobile app.

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

Code Management App & Configuration

Length: 3 Hours

Intended Audience: Jurisdiction administrators who are responsible for various components of setup and configuration of the EPL Code module.

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

Contact Management

Length: 2 Hours

Intended Audience: Jurisdiction administrators who are responsible for various components of setup and configuration of the EPL Contact module.

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



Custom Fields Configuration

Length: 3 Hours

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

Description: Instructors explain the purpose of custom fields and how they capture information that EPL does not collect in the standard fields. Admins learn which types of custom fields they can add to a layout and how to insert tabs on a layout to keep information organized. Instructors review how EPL uses the database names of custom fields and how to connect the custom field layout to a type/work class and an activity. Students learn how Civic Access leverages custom fields when different than the back office.

eReviews Admin – Demo VL

Length: 5 Hours

Intended Audience: Jurisdiction administrators who are responsible for set up and configuration of eReviews in Enterprise Permitting & Licensing.

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

eReviews – Review Coordinator & Manage My Reviews– Demo VL

Length: 2.5 Hours

Intended Audience: Enterprise Permitting & Licensing users who manage reviews conducted by multiple people or departments and who need to understand the process how eReviews interact with Bluebeam.

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

Inspections Mobile – Demo VL

Length: 1.5 Hours

Intended Audience: Users who need to understand the Inspections Mobile app.

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



Inspection Configuration

Length: 2.5 Hours

Intended Audience: Jurisdiction administrators who are responsible for various components of setup and configuration of the EPL Inspection module.

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

Inspection Management App

Length: 2 Hours

Intended Audience: Enterprise Permitting & Licensing users who need to understand the Inspection module.

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

IO, IAA, & Geo Rules

Length: 3 Hours

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

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

Navigation – System Overview with Hub

Length: 2.5 Hours

Intended Audience: All users of Enterprise Permitting & Licensing.

Description: Attendees learn fundamental concepts of EPL and their application to everyday computer use. The class begins with the Hub My Enterprise Permitting & Licensing Home page, which is the landing page for EPL. Topics include notifications, tasks, favorites, custom links, and recent cases. This class also covers the functionality of the Omnibar, Advanced Search, and how to navigate of the various apps such as Parcel Manager. The hands-on lab environment allows users to become familiar navigating in EPL, inputting, collecting, and analyzing information, and generating reports and documents. Also in this class, students explore the global relationships in EPL that allow the suite to be used by multiple departments serving numerous functions and still be the central source of information accessible to all users. EPL provides a wide variety of approaches to searching for information/applications in the suite.



Permit Configuration

Length: 2 Hours

Intended Audience: Jurisdiction administrators who are responsible for various components of setup and configuration of the EPL Permit module.

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

Permit Management App

Length: 2 Hours

Intended Audience: Enterprise Permitting & Licensing users who need to understand the Permit module.

Description: Attendees learn the tasks involved in processing a permit, including how to invoice and process fees, understand/manage workflow, complete Additional Info fields, create record-specific activities, create and manage conditions and holds, and track bonds.

Plan Configuration

Length: 2 Hours

Intended Audience: Jurisdiction administrators who are responsible for various components of setup and configuration of the EPL Plan module.

Description: Each user learns about the setting up the EPL Plan module components in correct order. Students learn how to identify the system settings that relate to the Plan module and the impact of the setup for a jurisdiction. Instructors share tricks and tips for configuration with users.

Plan Management App

Length: 2 Hours

Intended Audience: Enterprise Permitting & Licensing users who need to understand the Plan module.

Description: Users learn the tasks involved in plan intake in EPL. These tasks include invoicing and processing fees, understanding and managing workflow, completing additional info fields, creating record-specific activities, applying and managing specific conditions and holds. Students learn how to schedule and manage hearings and meetings and generate letters in the Plan module.

Professional License

Length: 2 Hours

Intended Audience: Enterprise Permitting & Licensing users who need to understand the Professional Licensing module.

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



Standard Review – Manage My Reviews

Length: 2 Hours

Intended Audience: Enterprise Permitting & Licensing users who are involved with a submittal or review process.

Description: Instructors demonstrate the standard review process that EPL manages through the workflow of a plan, permit, or licensing case, showing how reviewers access and manage item reviews in the Manage My Reviews app. Students complete item reviews and understand the review process cycle in the workflow.

System Settings & Global Setups

Length: 5 Hours

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

Description: Instructors explain the purpose of system settings and global setups. Attendees learn about the components associated with District setup including department, district, system settings, zone, and holiday. Instructors explain the purpose and configuration of attachment groups, conditions, mailing address types, global meetings, global hearings, hearing types, cycle recurrences, meeting types, offices, tasks, and time types. Attendees learn how these components are related to other settings in EPL.

User Setup & User Roles

Length: 2 Hours

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

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

Workflow Basics – End User

Length: 2 Hours

Intended Audience: All users of Enterprise Permitting & Licensing.

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

Workflow Basics & Configuration – Admin

Length: 3 Hours

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

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



Tyler University

Tyler changes Virtual Lab class offerings based on client demand. If a topic is unavailable in the current schedule, please browse through the videos in Tyler University. Please see the post on [Tyler Community for more video information](#).

Some classes that may be found in video format in [Tyler University](#) are:

1. Maps app
2. Advanced Search
3. Print Documents and Reports
4. Environmental Health - Manage Site, Business, and Operational Permit
5. Environmental Health – Add Site, Business, and Operational Permit
6. Environmental Health Setup, a four-part series
7. Add/Manage Object Cases



APPENDIX A: Certification Tracks

Certification Tracks are a combination of Virtual Lab classes. Certification Tracks are woven into the regular offerings in 2024. The tracks provide guidance on training plans or suggestions for developing Enterprise Permitting & Licensing training. Jurisdictions are responsible for managing the tracks in their own local processes.

Certification Tracks could include the following topics:

Civic Access Track

- Civic Access – End User
- Civic Access – Admin

eReviews Track

- Permit/Plan Management apps
- Standard Review – Manage My Reviews
- eReviews – Review Coordinator & Manage My Reviews – Demo VL
- eReviews Admin – Demo VL

End User Apps Track

- Navigation – System Overview with Hub
- Plan Management app
- Permit Management app
- Workflow Basics – End User
- Inspection Management app
- Code Management app
- Business License & Civic Access
- Professional License

Community Development Track

- Navigation – System Overview with Hub
- Permit Management app
- Permit Configuration
- Plan Management app
- Plan Configuration
- Standard Review – Manage My Reviews
- eReviews – Review Coordinator & Manage My Reviews – Demo VL
- eReviews Admin – Demo VL
- Inspection Management app
- Inspection Configuration
- Inspections Mobile – Demo VL

System Admin Track

- Navigation – System Overview with Hub
- Contact Management
- User Setup & User Roles
- System Settings & Global Setups
- Custom Fields
- Workflow Basics & Configuration
- Cashiering Fee Basics & Configuration
- IO, IAA, & Geo Rules



APPENDIX B: End-user vs. Admin Training

	Event name	End user	Admin
1.	Business License & Civic Access	X	
2.	Cashiering Fee Basics & Configuration - Admin		X
3.	Cashiering – End User	X	
4.	Civic Access – Admin		X
5.	Civic Access – End User	X	
6.	Code Enforcement Mobile – Demo VL	X	
7.	Code Management app & Configuration		X
8.	Contact Management		X
9.	Custom Fields		X
10.	eReviews Admin – Demo VL		X
11.	eReviews – Review Coordinator & Manage My Reviews – Demo VL	X	
12.	Inspection Configuration		X
13.	Inspection Management app	X	
14.	Inspections Mobile – Demo VL	X	
15.	IO, IAA, & Geo Rules		X
16.	Navigation – System Overview with Hub	X	
17.	Permit Configuration		X
18.	Permit Management app	X	
19.	Plan Configuration		X
20.	Plan Management app	X	
21.	Professional License	X	
22.	Standard Review – Manage My Reviews	X	
23.	System Settings & Global Setups		X
24.	User Setup & User Roles		X
25.	Workflow Basics & Configuration – Admin		X
26.	Workflow Basics – End User	X	

