



August 29, 2017 | DoubleTree by Hilton Fresno Convention Center

The Accele Environmental Health team is pleased to present the agenda and course descriptions for our 2017 EnvisionConnect Training. This annual event is an opportunity for EnvisionConnect users and Accele staff to come together for training, networking, sharing updates and ideas, and Q&A.

Agenda

7:45 AM – 8:45 AM	Breakfast	
8:45 AM – 9:45 AM	Welcome Presentation and Company/Product Updates	
9:45 AM – 10:30 AM	Networking	
10:30 AM – 11:30 AM	Daily Financial Activities	Accele Environmental Health on the Civic Platform
11:30 AM – 12:15 PM	Lunch	
12:15 PM – 1:15 PM	Introduction to Report Builder for EnvisionConnect	EnvisionConnect 5.4
1:30 PM – 2:30 PM	Strategic Planning for Report Builder	EnvisionConnect Online
2:30 PM – 3:00 PM	Break	
3:00 PM – 4:00 PM	CERS Updates	EnvisionConnect Remote Basics and Advanced
4:15 PM – 5:15 PM	Streaming, Billing, Printing and Receipting	EnvisionConnect Basics and Advanced

Class Descriptions

Daily Financial Activities | 1.00 CEU

Tuesday, August 29

10:30 AM – 11:30 AM

Instructor: Erika Falcon

This course is designed for anyone who works with daily back office activities in the accounting department (accounts, invoices, reports, etc.), and the user should know typical accounting terms and principles. If you are new to the EnvisionConnect Financial System, or wish to learn the best ways to work with the Financial System, this course is for you.

This course will detail the best method of utilizing EnvisionConnect's financial system. We will walk through creating invoices, system configuration, invoice research, and other best practices. The goal of this course is to gain knowledge to reduce errors and increase efficiency.

This class will expose you to techniques and features to make your agency more efficient and responsive to your monitored programs and facilities, including:

System Configuration

- Using reports when you don't have access to the Configuration Wizard
- What can happen if you don't know your configuration

Invoice Research

- Understand when and how to use the account, invoice and line item history records

Driving Efficiency in Everyday Activities

- Apply payment to either non-permitted or permitted line items
- Action item to adjust a full or partial amount of a line item
- Write off an entire invoice
- Transfer payments from one account to another on the same owner
- Manually change data elements on an invoice line item
- Using the Dispatch Center and Action button

Payment Techniques

- The fastest payment processing techniques
 - Using the Batch Payment Import workflow
 - Using the Batch Payment Processing workflow
 - Using bar codes

Accela Environmental Health on the Civic Platform | 1.00 CEU

Tuesday, August 29

10:30 AM – 11:30 AM

Instructors: Darryl Booth, Tom Edwards

Let by experts with experience in both your EnvisionConnect products and the new Accela Environmental Health solution, we will introduce how health department processes and activities will function on the Accela Civic Platform.

- Overview and introduction
- Records used for inspections
 - How the records work as the foundation for the inspections
- Inspections
 - Setup and scheduling
 - Checklists and finalizing inspections
 - Mobility
- Mobile Office and the Inspector App
- Q/A

LUNCH BREAK | 11:30 AM – 12:15 PM

Introduction to Report Builder for EnvisionConnect | 1.00 CEU

Tuesday, August 29

12:15 PM – 1:15 PM

Instructor: Chee Chang

The goal of this course is to provide and build upon a user's knowledge and skills to create various types of reports using Report Builder 3.0. We will focus on how to use Report Builder 3.0's powerful features and tools.

Attendees will be able to:

- Create a basic columnar report
 - Selecting tables and fields
 - Creating relationships and filtering
 - Grouping and sorting
- Create a click-through report
 - Using SQL queries
 - Free-form formatting
 - Using sub-reports
- Enhance reports advanced features
 - Saving time by saving and using existing data sets
 - Create custom fields using expression formulas
 - Date and Time functions
 - String functions
 - Decision functions
 - Adding gauges, spark lines, data bars and KPI

EnvisionConnect 5.4 | 1.00 CEU

Tuesday, August 29

12:15 PM – 1:15 PM

Instructor: Josh Carey

This class will expose you to several enhancements in EnvisionConnect and EnvisionConnect Remote 5.4 that can make your agency more efficient and more responsive to your monitored programs and facilities. These include:

- Improvements to water system monitoring
- Enhanced email communication
- Improved GIS functionality and user experience
- Better invoice handling
- Improved batch billing
- Streamlined online payments and permit printing
- New visual alerts for critical events/information at record detail pages
- EnvisionConnect improvements that affect EnvisionConnect Online
- Improvements to EnvisionConnect Remote 5.4

Strategic Planning for Report Builder | 1.00 CEU

Tuesday, August 29

1:30 PM – 2:30 PM

Instructor: Holly Adams - Environmental Health Informatics Specialist at Tri-County Health Department in Colorado

If you know the basics of Report Builder 3.0's tools and features, you may be ready to start building more comprehensive reports. In this session, we will walk you through the strategic questions and planning items you should consider when building a new report. The class will also cover specific changes you can make to reports to make them more user-friendly and actionable.

Planning for your new report

- Multiple reports or one report with multiple categories?
- Layout formatting, designing and branding
- Considerations for report design: layout, choosing colors, etc
- Important questions to ask before you start

Parameters

- Setting date defaults
- Show descriptions instead of codes for Program Category/Program Element
- Identify employees by names
- Hide columns based on a parameter

Report Subscriptions

- Set up a report subscription
- Set email frequency

EnvisionConnect Online | 1.00 CEU

Tuesday, August 29

1:30 PM – 2:30 PM

Instructor: Darryl Booth

This course will cover recent updates to EnvisionConnect Online, the online portal for easy and automated transactions between your citizens/registered business owners and EnvisionConnect. We will cover such as topics as complaint, service request, application/plan check/renewal, public record request and payment submission.

Anyone who has already, plans to, or is interested in implementing EnvisionConnect Online, or in automating submissions (complaints, service requests, applications/plan checks/renewals, public record requests, and payments) over the web, will find this session informative.

COFFEE BREAK | 2:30 PM – 3:00 PM

EnvisionConnect Remote Basics and Advanced | 1.00 CEU

Tuesday, August 29

3:00 PM – 4:00 PM

Instructor: Joseph Palazuelos

EnvisionConnect Remote offers the one-stop-shop that inspectors are looking for and gives them the ability to maintain a schedule, review records, and perform inspections (even multiple inspections at the same time) using a familiar and easy-to-use interface.

This class will provide best practices and tips to existing users. The focus is to ensure the students discover and embrace the most efficient and automated method to manage not only their inspection data, but related information as well.

This includes:

- Adding
 - Appointments to the calendar
 - Custom views
 - Daily time and activity
 - Complaints
 - Service requests
 - Special event booths
 - Vector sites
 - Attachments
 - Comments
- Conducting
 - Routine inspections for general programs, water systems, septic systems, water well permits, service requests, vector sites, and special events
 - Follow-up for violations, complaints, etc.
 - Unscheduled inspections for general programs, complaints, service requests, special event booths, and vector sites
 - Team inspections

CERS Updates | 1.00 CEU

Tuesday, August 29

3:00 PM – 4:00 PM

Instructor: Erika Falcon

This course will cover the latest CERS topics and is for CUPA clients only.

Streamlined Billing, Printing and Receipting | 1.00 CEU

Tuesday, August 29

4:15 PM – 5:15 PM

Instructor: Aisha Mondol

Reinforce the practices and principles underlying the design of EnvisionConnect's Financial System, and learn about simpler and more cost-effective methods an agency can follow to reduce the effort and cost of managing your financial data.

Note: Only personnel responsible for and who have knowledge of their agency's financial matters, including the agency's policies regarding annual permit billing, service billing, receipting and aging and penalization, should attend this class.

We will also discuss the roadmap to go from an inefficient method to the efficient method of billing, including:

- The proper configuration of support codes even if agency policies change
- Best practices for batch invoicing – Permits, Daily Time and Activity, and Site Remediation
- The difference between generating invoice records and printing invoices
- The best and most efficient invoice report format
- The fastest payment processing techniques

EnvisionConnect Basics and Advanced | 1.00 CEU

Tuesday, August 29

4:15 PM – 5:15 PM

Instructor: Joseph Palazuelos

Are you a new user to EnvisionConnect? Are you looking to learn the basic and key features offered within EnvisionConnect? Do you want to learn the easiest and most efficient ways to navigate the application? If so, then this course is right for you.

This course will cover the basic and fundamental functions of EnvisionConnect so you can more comfortably maneuver with ease and confidence. Topics covered include:

- Search Techniques
- Data Entry Techniques
- Quick Launch and Favorites
- Reports
- Action Button