



2024 Education Schedule

for CSC LicenseHQ® and CSC License Pro®



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Product Training Information

Product Training Information

CSC offers a wide selection of courses for both the new and advanced users, most of which are eligible for CPE credit. All sessions are taught by experienced trainers and are designed to help address real-life issues through case studies and hands-on exercises.

We offer many convenient learning options to help address your learning needs on your terms:

- **Webcasts.** View free live webcasts or our library of on-demand webcasts over hot topics. The webcasts are designed to help you learn and work more efficiently.
- **Online Training.** Online instructor-led sessions provide detailed learning on specific subjects without having to leave your office.
- **Self-Study.** Online product training courses that are available on demand from our recording library, including interactive videos.
- **Classroom Training.** Immerse yourself in instructor-led sessions. Sessions are limited to a small number of participants to allow for individual instruction and knowledge-sharing. Visit our primary locations in the Chicago area, Dallas/Fort Worth area, or San Diego.
- **Onsite Training.** Experienced members of our training team will travel to your office and deliver a comprehensive training agenda designed to your specifications. Complete the [onsite request form](#) for more information.
- **Conference.** Attend CONNECT for networking and learning about all things CSC.

Training Locations

Chicago Area

2100 E. Lake Cook Road
Suite 800
Buffalo Grove, IL 60089
847.236.8000

Dallas/Fort Worth (DFW) Area

4400 State Highway 121
Suite 500
Lewisville, TX 75056
972.677.4200


San Diego, CA

13500 Evening Creek Dr. N
Suite 500
San Diego, CA 92128
858.547.4100

All online courses and classroom sessions in the Dallas/Fort Worth and Chicago areas are listed in Central Time (CT). San Diego, CA classroom sessions are in Pacific Time (PT).

Continuous Education Subscription

One low price for a Continuous Education Subscription (CES) entitles you and your entire team to take advantage of continuous learning on CSC LicenseHQ®, CSC License Pro®, PTMS, and AppealTrack. The CES provides access to many online and classroom training sessions* for all licensed users at your company.

Note: Courses in this schedule that are included with the Continuous Education Subscription include the following indicator: 

Session topics span the LicenseHQ, LicensePro, PTMS, and AppealTrack products. Each session outlines learning objectives to improve your product usage and efficiency. With more than 100 sessions to choose from, you will find the right course for your business needs. Online sessions include self-study and live-instructor options. Classroom sessions offer hands-on learning and take place in our Chicago, Dallas/Fort Worth, or San Diego locations. Access is easy—just log in to [CSC Connections](#) and select the session of your choice from the **Learn** area. The subscription pricing activates when you log in. Your subscription term mirrors your product renewal cycle, streamlining the approval process.

Contact your Account Manager or CRM today and get all the details on this great opportunity for your company.

CPE Information

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits will be granted based on a 50-minute hour. CPE is available for most live training sessions, but please check the training details in the Education Schedule for the official amount of CPE credits for each session.

Corptax, Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

NASBA National Registry of CPE Sponsors – Sponsor License Number 108611

Texas State Board of Public Accountancy – Sponsor Number 009498

In accordance with the National Association of State Boards of Accountancy (NASBA) standards, course evaluations will be distributed at the end of the event.

Registration Information

Registration Information

A full listing of course offerings is available by visiting [CSC Connections](#). Please review the training details, including descriptions, price, and available CPE credits, for a course by browsing from the list of upcoming sessions or typing in the name of the course in the **Search** field.

To register, you must complete the online registration form including the payment processing:

1. Log in to [Connections](#).
2. Click **Learn, Learn Home**.
3. Explore training opportunities by course type or product.
4. Locate the desired course and click **Register**.
5. Select **Complete Registration Now** or **Add to Cart and Complete Registration Later** to continue shopping and checkout via the cart when ready. **Note:** Your spot in a class is not reserved until you complete the checkout process.
6. Verify the class and price.
 - If you have a discount code, enter it into the **Discount Code** field and click **Apply Discount**.
 - If you have a training subscription, the price reflects what is included in your subscription.
7. Enter your payment information and click **Place My Order**.
8. Click **Printable Receipt** on the Registration Complete page to print your receipt. You can also access course information and handouts from this page.
9. Click **View Product** to access course information and handouts from this page.
10. Click **My Learning** to access your registered courses.

Session Materials for Classroom, Regional, and Onsite Training

Each training laptop (if applicable) has electronic materials loaded, and you can download materials prior to the session date.

To purchase a printed copy of session materials, you must place an order two weeks prior to the session date for which you are registered. The shipped orders go directly to the address provided in the request. No printed copies are available the day of the session. You can also purchase materials for a session that you are not attending. You will be invoiced for the purchase. CSC classroom session materials are \$30 per book or downloadable file. Free shipping for all printed books. No refunds on purchased material.

To place an order for a printed copy of session materials:

1. Log in to [Connections](#).
2. Submit a support case and include the session title, session date, and shipping address in the case details.

Cancellation Policy

- Cancellations up to three days prior to a scheduled classroom session will result in a \$400 withdrawal fee per registrant.
- Cancellations up to three days prior to a scheduled online session will result in a \$50 withdrawal fee per registrant.
- Cancellations within three days of any session and no-shows will be charged the full session fee.

We reserve the right to change the session fee and modify, reschedule, or cancel sessions at any time prior to the session start time. If we cancel a classroom session for which you are registered, you will receive a cancellation email three weeks prior to the session. If we cancel an online session for which you are registered, you will receive a cancellation email one week prior to the session.

To cancel your session for either a Classroom or Online session:

1. Log in to [Connections](#).
2. Create a case and select **Training** as the Product. Include the session date and title in the case details.

Additional Information

Please contact us at education@corptax.com for more information regarding course content, delivery methods, or CPE; to inquire about our refund and cancellation policy; or to log a complaint regarding a session.

Alphabetical Listing of Courses

Alphabetical Listing of Courses

Throughout this schedule, you can view courses based on their product or product area. Use this list to locate courses based on their name or type. Click a course name below to view full course details.

Types

 Online Training Course

 Continuous Education Subscription Eligible

 Classroom Training Course

| Course | Types | | |
|---|-------|---|-----|
| | O | C | CES |
| Beyond the Basics for LicenseHQ | | ● | ● |
| Build a Clear Compliance Picture with Reports in LicenseHQ | ● | | ● |
| Calling All Leaders: Manage Workloads and Guide Your Team to Success in LicenseHQ (NEW) | ● | | ● |
| Close the Compliance Gap with the LicenseHQ Forms Database | ● | | ● |
| Custom Training for the Advanced LicenseHQ User | ● | ● | |
| Enhance Your Focus: A New Approach to the LicenseHQ Dashboard | ● | | ● |
| LicenseHQ: Basics—Data Management | ● | | ● |
| LicenseHQ: Basics—Workflow | ● | | ● |
| LicenseHQ for the New User | | ● | ● |
| LicenseHQ for the New User 2-Day | | ● | ● |
| LicenseHQ New User Series | ● | | ● |
| License Pro: Beyond the Basics (NEW) | ● | | ● |
| License Pro for the New User Series (NEW) | ● | | ● |
| Manage Your Data: Imports and Batch Functions in LicenseHQ | ● | | ● |
| Tailoring LicenseHQ to Fit Your Needs | ● | | ● |



LicenseHQ Courses

LicenseHQ for the New User



Get users up and running with LicenseHQ basics. This session demonstrates how to use the dashboard and workflows to manage renewals from start to finish. Easily track renewal updates, manage documents, and process payments. Open new locations faster, run reports like a pro, and increase efficiency using batch processing.

Objectives:

- Navigate LicenseHQ
- Define system options and support records
- Customize the dashboard and workflows
- Track the renewal and payment process
- Evaluate the payment process and requirements
- Upload attachments
- Discover the process of opening new locations including applications, notifications, and tasks
- Process renewals and update and upload attachments in batch
- Create reports and manage exports in LicenseHQ
- Access the forms database
- Manage security

Delivery Method: Classroom

Prerequisite: None

Subject Area: Computer

Advanced Prep: None

Software & Applications

CPE: 7.5

Course Level: Basic

Price: \$695

Course Number: 03-L1000-1

Duration: 1 day

Course Dates for Dallas, TX:

Course Time:

- January 26
- March 22
- July 26

8:30 AM - 4:30 PM CT

Course Dates for Chicago, IL

Course Time:

Area:

- August 27

8:30 AM - 4:30 PM CT

LicenseHQ for the New User 2-Day



Get users up and running with LicenseHQ basics. This session demonstrates how to use the dashboard and workflows to manage renewals from start to finish. Easily track renewal updates, manage documents, and process payments. Open new locations faster, run reports like a pro, and increase efficiency using batch processing.

Objectives:

- Navigate LicenseHQ
- Define system options and support records
- Customize the dashboard and workflows
- Track the renewal and payment process
- Evaluate the payment process and requirements
- Upload attachments
- Discover the process of opening new locations including applications, notifications, and tasks
- Process renewals and update and upload attachments in batch
- Create reports and manage exports in LicenseHQ
- Access the forms database
- Manage security

Delivery Method: Classroom

Prerequisite: None

Subject Area: Computer

Advanced Prep: None

Software & Applications

CPE: 15.5

Course Level: Basic

Price: \$1095

Course Number: 03-L1000-2

Duration: 2 days

Course Dates: Check back for future dates

LicenseHQ New User Series



Get users up and running with LicenseHQ basics. This session demonstrates how to use the dashboard and workflows to manage renewals from start to finish. Easily track renewal updates, manage documents, and process payments. Open new locations faster, run reports like a pro, and increase efficiency using batch processing.

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Duration: 4 hours

Course Number: 06-L1001
Prerequisite: None
Advanced Prep: None
Price: \$400

Course Dates:

- January 2/4
- January 16/18
- January 30/February 1
- February 13/15
- February 27/29
- March 12/14

- April 2/4
- April 16/18
- May 7/9
- May 21/23
- June 11/13
- June 25/27
- July 9/11
- July 23/25

Individual Modules—Day 1

Course Number:
06-L1001-1

Course Time:
12:00 PM–2:30 PM CT
CPE: 3

Workflow: This session will provide you with renewal and payment fundamentals, along with tools, tips, and best practices so you can take advantage of LicenseHQ's time-saving features!

Objectives:

- Navigate LicenseHQ
- Define system options and support records
- Track the renewal and payment process
- Customize the dashboard and workflows
- Create records and views
- Upload attachments

Individual Modules—Day 2

Course Number:
06-L1001-2

Course Time:
12:00 PM–2:30 PM CT
CPE: 3

Data Management: Build a strong understanding of data management within LicenseHQ. Practice creating and sending custom automated reports, managing your workflow processes in batch, and tailoring LicenseHQ to your specific needs.

Objectives:

- Discover the process of opening new locations, including applications, notifications, and tasks
- Process renewals, update and upload attachments in batch
- Create reports and manage exports in LicenseHQ
- Access the forms database
- Manage security

Custom Training for the Advanced LicenseHQ User



Online Course

Optimize your use of LicenseHQ with advanced training. Design your own course curriculum to gain expertise and utilize LicenseHQ to best suit your business needs.

Sample topics:

- Reports and Exports
- Best Practices
- Data Cleanup (Inactivating Data)
- Customize Workflows
- Optimizing Setup Options

Delivery Method: Online

Subject Area: Computer Software & Applications

Course Level: Intermediate

Course Number: 06-L2000

Prerequisite: None

Advanced Prep: None

CPE: TBD

Price: TBD

Duration: Varies

Course Dates: Sessions are available on request.

Classroom Course

Optimize your use of LicenseHQ with advanced training. Design your own course curriculum to gain expertise and utilize LicenseHQ to best suit your business needs.

Sample topics:

- Reports and Exports
- Best Practices
- Data Cleanup (Inactivate Data)
- Customize Workflows
- Optimize Setup Options

Delivery Method: Classroom

Subject Area: Computer Software & Applications

Course Level: Intermediate

Course Number: 03-L2000

Prerequisite: None

Advanced Prep: None

CPE: TBD

Price: TBD

Duration: Varies

Course Dates: Sessions are available on request.

Beyond the Basics for LicenseHQ



You've been through basic training, now advance your mastery of LicenseHQ beyond processing renewals and paying bills. Go beyond the basics, ensure you are using all of the tools LicenseHQ has to offer, and learn best practices to make your life easier.

Objectives:

- Use the dashboard to track the payment process
- Customize workflows
- Renew licenses
- Discover the process of opening new locations including applications, notifications, and tasks
- Evaluate the payment process and requirements including approvals, check requests, and exports to Accounts Payable
- Access the forms database
- Create reports and manage exports

Delivery Method: Classroom

Prerequisite: None

Subject Area: Computer Software & Applications

Advanced Prep: None

Course Level: Advanced

CPE: 7.5

Course Number: 03-L3000

Price: \$695

Duration: 1 day

Course Dates: Check back for future dates

LicenseHQ: Basics—Workflow



Are you looking to master LicenseHQ? If so, this course will help you get there! Attending this session will provide you with renewal and payment fundamentals, along with tools, tips, and best practices so you can take advantage of LicenseHQ's time-saving features! The session uses a blended approach, combining elements of lecture, demonstration, and hands-on practice.

Objectives:

- Navigate LicenseHQ
- Define system options and support records
- Use the Dashboard to track the renewal and payment process
- Customize workflows
- Create records in LicenseHQ
- Renew licenses
- Evaluate the payment process and requirements including approvals, check requests, and exports to Accounts Payable
- Upload attachments

Delivery Method: Online

Prerequisite: None

Subject Area: Computer Software & Applications

Advanced Prep: None

Course Level: Basic

CPE: 2

Course Number: 06-L1100

Price: \$200

Duration: 2 hours

Course Dates: Check back for future dates

LicenseHQ: Basics—Data Management



Continue your learning adventure by building a strong understanding of data management within LicenseHQ. You'll practice creating and sending custom automated reports, support records, and tailoring LicenseHQ to your specific needs.

You will also learn how to search the forms database, reducing the time you spend performing research, giving you back time to tackle other tasks.

Objectives:

- Discover the process of opening new locations, including applications, notifications, and tasks
- Process renewals and update and upload attachments in batch
- Create reports and manage exports in LicenseHQ
- Access the forms database
- Manage security

Delivery Method: Online

Subject Area: Computer Software & Applications

Course Level: Basic

Course Number: 06-L1200

Prerequisite: None

Advanced Prep: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates: Check back for future dates

Enhance Your Focus: A New Approach to the LicenseHQ Dashboard



What is the dashboard doing for you? Customize your dashboard to reveal key insights of critical deadlines and avoid missed filings. Build grid views with fields that drive decision making, get access to workflow processes from a single page, and resolve issues that cause your dashboard to become out of sync.

Objectives:

- Identify and resolve renewal backlog
- Correct workflow discrepancies causing issues
- Organize received licenses for efficient updating
- Resolve payment requirement problems
- Review current AP process to ensure accurate check requests
- Uncover hidden fields to help you manage your records
- Create custom reports to track cleanup project process
- Document changes to your workflow and the LicenseHQ system to improve accuracy, timely compliance, and avoidance of penalties and violations

Delivery Method: Online

Subject Area: Computer Software & Applications

Course Level: Basic

Course Number: 06-L4005

Prerequisite: None

Advanced Prep: None

CPE: 2

Price: \$200

Duration: 2 hours

Course Dates:

- March 1
- June 12

Course Time:

12:00 PM–2:00 PM CT

Tailoring LicenseHQ to Fit Your Needs



Explore ways to get more out of LicenseHQ and eliminate the frustrations when things don't go as expected. Reveal common challenges and how to quickly resolve them.

Objectives:

- Utilize workflow status tracking to determine why licenses are not available for renewal
- Develop the best method of displaying Dashboard data using dates and customization
- Use filter criteria to display check requests by state
- Select organization appropriate setup options
- Change data on payment records to allow check request creation
- Construct a process to remove incorrect payment information and re-enter payments
- Decide the best practice for updating records for filters, reports, and exports
- Outline grid configurations to identify data issues

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Intermediate
Course Number: 06-L4105

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: \$200
Duration: 2 hours

Course Dates:

- February 16
- June 18

Course Time:

12:00 PM–2:00 PM CT

Close the Compliance Gap with the LicenseHQ Forms Database



Are you using the forms database for just new locations? Did you know it can do so much more? In addition to streamlining new location research, the forms database eliminates the gap between filing applications and the renewal process. Discover how the database integrates your LicenseHQ data with the forms needed to record change of ownership, update existing licenses, report personnel changes, and more.

Objectives:

- Recognize the four methods to search for forms
- Create license records from the Forms module
- Attach forms to existing license records
- Identify newly saved filters
- Operate the in-grid filtering

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic
Course Number: 06-L4205

Prerequisite: None
Advanced Prep: None
CPE: 2.0
Price: \$200
Duration: 2 hours

Course Dates:

- March 26
- July 24

Course Time:

12:00 PM–2:00 PM CT

Manage Your Data: Imports and Batch Functions in LicenseHQ



Tap into the features of LicenseHQ that enable you to work faster and obtain better results to get a stronger return on your investment. Discover the processes you can complete in batch instead of one-at-a-time, and get familiar with other automation tools.

Objectives:

- Review the import process
- Learn how to quickly update a batch of data
- Select and update multiple records
- Analyze and update the Dashboard task list
- Create and manage location tasks

Delivery Method: Online

Subject Area: Computer Software & Applications

Course Level: Basic

Course Number: 06-L4305

Prerequisite: None

Advanced Prep: None

CPE: 2.0

Price: \$200

Duration: 2 hours

Course Dates:

- January 5
- April 5
- July 31

Course Time:

12:00 PM–2:00 PM CT

Build a Clear Compliance Picture with Reports in LicenseHQ



Ensure strong communication across your team and organization with LicenseHQ. Practice creating grids and views, managing tasks, building custom reports, scheduling report distribution for key personnel, and more!

Objectives:

- Learn how to set up Site Notifications for on-site managers
- Create custom LicenseHQ reports and schedule report delivery
- Configure cross-module reports
- Work with the custom Tasks report
- Customize notifications based on task details
- Create saved grids and views
- Send custom reports to anyone, including external email addresses

Delivery Method: Online

Subject Area: Computer Software & Applications

Course Level: Basic

Course Number: 06-L4405

Prerequisite: None

Advanced Prep: None

CPE: 2.0

Price: \$200

Duration: 2 hours

Course Dates:

- March 27

Course Time:

12:00 PM–2:00 PM CT

Calling All Leaders: Manage Workloads and Guide Your Team to Success in LicenseHQ (NEW)



Explore ways to get more out of LicenseHQ as a leader. Learn how to utilize existing functionality to manage your teams' workloads and projects beyond the renewal.

Objectives:

- Understand how to manage user security and access rights
- Manage how to inactivate former users
- Explore user assignments vs. user rights
- Review workflow steps and renewal workflow statuses
- Setup custom grids to view and manage team workflow steps
- Learn how to manage ownership changes in LicenseHQ
- Configure status and user fields
- Configure custom reports for workload management

Delivery Method: Online

Prerequisite: None

Subject Area: Computer Software & Applications

Advanced Prep: None

CPE: 2.0

Course Level: Basic

Price: \$200

Course Number: 06-L4505

Duration: 2 hours

Course Dates: Check back for future dates



License Pro Courses

License Pro for the New User Series (NEW)



Get users up and running with License Pro basics. This session demonstrates how to use the homepage and workflows to manage renewals from start to finish. Easily track renewal updates, tasks, attachments, and process payments. Create a unique user experience by customizing features and functions, run reports like a pro, and increase efficiency with batch processing.

Delivery Method: Online
Subject Area: Computer Software & Applications
Course Level: Basic

Course Number: 06-LP1000
Prerequisite: None
Advanced Prep: None

Price: \$600
Duration: 6 hours

Course Dates:

- March 19/21
- April 23/25
- May 14/16
- June 18/20
- July 16/18

Individual Modules—Day 1

Course Number:
06-LP1000-1
Course Time:
9:00 AM–12:00 PM CT
CPE: 3

Records and Workflows: Build a strong understanding of navigation and workflows in License Pro. This module will review all main grids and menus, along with workflows in the admin center. Practice creating and sending records, notes, and attachments, and review customizable features in the software.

Objectives:

- Review general navigation, including lists, tools, and help
- Understand renewal and custom workflows
- Build workflows and workflow steps
- Recognize features in main grids
- Create Grid Configurations and Filter Sets
- Generate licenses, sites, notes, and tasks
- Send records and attachments

Individual Modules—Day 2

Course Number:
06-LP1000-2
Course Time:
9:00 AM–12:00 PM CT
CPE: 3

Data Management and Renewals: This session will provide you with the skills necessary to effectively manage data and renewals. Apply Module 1 skills to complete renewals and payments, both for single records and in batch. Understand system options in the admin center to make the most of License Pro's features and functionality.

Objectives:

- Complete single and batch license renewals
- Create electronic payments
- Create check payments
- Print and export check requests
- Review batch processes for attachments, notes, and tasks
- Understand system options in the admin center
- Generate and schedule reports
- Visit Connections

License Pro: Beyond the Basics

(NEW)



Take your License Pro experience to the next level and build on the foundational skills from our custom training. Learn trainer tips and tricks for some of the most frequently used functions in License Pro.

Objectives:

- Review and learn how to adjust configurations for both imports and AP exports.
- Understand how copy and copy links can help you link records and create new records with only a few mouse clicks.
- Learn options and tips for calculating payments in License Pro.
- Learn how to customize your Dashboard to display important KPIs
- Explore advanced reporting options.

Delivery Method: Online

Subject Area: Computer Software & Applications

Course Level: Basic

Course Number: 06-LP3100

Prerequisite: None

Advanced Prep: None

CPE: 2.0

Price: \$200

Duration: 2 hours

Course Dates:

- April 10

Course Time:

12:00 PM–2:00 PM CT

Self-Study Courses

To register for a Self-Study course, follow the steps in the [Registration Information section on page 5](#). Once you register, you will have access to the recording and the corresponding session documents for 30 days.

To access the training:

1. Log in to [Connections](#).
2. Hover over the **Learn** box and click **View All Training Opportunities**.
3. Click **My Learning**.
4. Locate the session and click on the title link.

Self-Study courses are included in the Continuous Education Subscription. [Click here](#) for more information.

LicenseHQ Self-Study Courses

Note: No CPE is available for LicenseHQ Self-Study courses.

| LicenseHQ Course Details | Duration |
|---|-----------|
| Configure Options in LicenseHQ Ensure you have the best workflows in place before you begin processing renewals. Setup workflow tasks, review available options for approvals, check requests and A/P exports to match your business needs. | 5 minutes |
| Creating Custom Reports in LicenseHQ If you need specifics beyond what a standard report can provide, then you need a custom report. Review custom report options and configure a custom report that will meet your specific reporting needs. | 5 minutes |
| Creating Custom User Fields in LicenseHQ Configure LicenseHQ to meet your specific organizational needs and nuances with user-defined fields. Practice creating User fields to track additional information your company needs to store in LicenseHQ. | 5 minutes |
| Customize Captions in LicenseHQ Add customization to LicenseHQ with the use of custom captions. Apply custom captions that match your organization's specific terminology. | 5 minutes |
| Essential Navigation Tips for LicenseHQ Learn time-saving tips for navigating LicenseHQ. Topics include selecting single and multiple records, paging preferences, and using the find feature. | 5 minutes |
| Exporting Data from LicenseHQ Discover how to get data out of LicenseHQ for a quick ad hoc report or to provide information to another department with the export tool. Practice configuring and arranging date for exporting. | 5 minutes |
| Generating Standard Reports in LicenseHQ Let's talk about reports. Here you will gain best practices for generating a variety of standard reports and how to export such reports from LicenseHQ. | 5 minutes |
| Leverage the Right Filters for Best Results in LicenseHQ Build the best filter sets to maximize search results so you can find your records quickly and easily. | 5 minutes |
| LicenseHQ Imports How do you get your data into LicenseHQ? Explore tips and tricks to getting your records in the right place the first time using the import function. | 5 minutes |
| Managing Attachments in Batch with LicenseHQ Wait there's more! Not only can you process multiple renewal, payment and update records in on pass, you can also apply batch functionality to attachments. Save time and implement the ins and outs of batch attachments. | 4 minutes |
| Managing Individuals in LicenseHQ An individual in LicenseHQ represents a person that requires one or more licenses or permits to comply with employment regulations. This short video walks you through the process of tracking the various licenses, permits, training details and other items associated with an individual. | 5 minutes |

Self-Study Courses

| LicenseHQ Course Details | Duration |
|--|------------|
| Managing Inspections in LicenseHQ LicenseHQ can track the entire inspection lifecycle: from initiation, the inspection itself, violations, plan of action, corrective measures taken, payments, to a successful resolution. This video walks you through the steps of creating and managing inspection records in LicenseHQ. | 5 minutes |
| Managing the Renewal and Payment Workflow using Batch Processing in LicenseHQ Processing a single renewal and payment is a thing of the past! Get the most out of LicenseHQ with the batch processing functionality. Learn how to harness this tool to complete multiple renewals and payments from a single page in bulk. | 5 minutes |
| Organize Your List Pages in LicenseHQ Utilize list pages to manage how your records are displayed for easy record navigation and identification. Configure list pages to filter to the records that are displayed on the dashboard in its respective module. | 5 minutes |
| Security Setup in LicenseHQ Ensure you have the best security model and practices in place with LicenseHQ security. | 5 minutes |
| The LicenseHQ Forms Database Do you find yourself spending countless hours researching the web and making countless calls to issuing authorities just so you can verify what information you need and what to include with a new license or permit application? Fear no more! Review the best search methods and practice searching for new licenses or permits without having to leave LicenseHQ. | 11 minutes |
| The License Renewal and Payment Workflow in LicenseHQ Master the license renewal cycle. Sharpen your single license renewal workflow skills and apply the best practices for processing payments, approvals, check requests, and A/P exports. | 5 minutes |
| Updating Records Using Batch Functionality in LicenseHQ Enjoy the same great batch functionality characteristics you have come to love, and learn how to apply it to updating multiple of records in bulk on one screen. | 5 minutes |
| Updating Records in Batch Using Update Imports in LicenseHQ Why update one record at a time when you can do multiple at once! Use the update import tool to update several records at once, saving you the agony of updating one record at a time. | 5 minutes |
| Uploading Attachments in LicenseHQ Don't store your licenses or permits outside of LicenseHQ. Travel down the attachment road with us, and review and practice how to store all of your important and relevant LicenseHQ documents in their respective place. | 3 minutes |
| Working with Tasks in LicenseHQ Never miss important events again! Dig into the world of tasks and learn how to apply multiple tasks to various record types. | 5 minutes |
| Vehicle Records in LicenseHQ A vehicle record in LicenseHQ can represent almost any form of motorized transport such as a car, truck, boat, or airplane. Watch this video to review the process of tracking the various licenses, permits, decals, and other items associated with the vehicle. | 5 minutes |

License Pro Self-Study Courses

Note: No CPE is available for License Pro Self-Study courses.

| License Pro Course Details | Duration |
|---|------------|
| Managing Reports in License Pro Managing Reports demonstrates how to create customized reports in License Pro. This session shows how to create a report, filter and choose report data, include related records, and set the reports on a schedule if needed. | 15 minutes |
| Navigating License Pro Navigating License Pro demonstrates general navigation of the software. The session begins with the Homepage and shows how to open and manipulate main grids, displays the Admin Center and My Account menus, and reviews the information found in the Lists, Tools, and Help menus. | 11 minutes |

| License Pro Course Details | Duration |
|---|------------|
| Reviewing the Admin Center in License Pro Reviewing the Admin Center shows how to customize system options in License Pro. This session demonstrates customization options for payments, date ranges, filtering, filter sets, grid configurations, approvals, and site notifications. | 19 minutes |
| Setting Up Users and Groups in License Pro Setting Up Users and Groups demonstrates how to customize users and groups in the Admin Center. This session reviews the Users, Groups, and Security settings under the Options menu. | 8 minutes |
| Working with Grids in License Pro Create grid configurations and use many of the grid tools, including grouping and other right-click menu features. | 29 minutes |

Learning Paths

Take a look at the following Learning Paths to see the courses you should participate in to help you transition from a beginner to a more advanced user of each product.

Note: Some courses apply to more than one product area.

LicenseHQ New User Learning Path

| Title | Duration | Level |
|---|----------|--------------|
| LicenseHQ for the New User | 1-2 Days | Basic |
| Enhance Your Focus: A New Approach to the LicenseHQ Dashboard | 2 Hours | Basic |
| Tailoring LicenseHQ to Fit Your Needs | 2 Hours | Intermediate |
| Close the Compliance Gap with the LicenseHQ Forms Database | 2 Hours | Basic |
| Manage Your Data: Imports and Batch Functions in LicenseHQ | 2 Hours | Basic |
| Build a Clear Compliance Picture with Reports in LicenseHQ | 2 Hours | Basic |
| Custom Training for the Advanced LicenseHQ User | TBD | Intermediate |

LicenseHQ Experienced User Learning Path

| Title | Duration | Level |
|---|----------|--------------|
| Beyond the Basics for LicenseHQ | 1 Day | Advanced |
| Enhance Your Focus: A New Approach to the LicenseHQ Dashboard | 2 Hours | Basic |
| Tailoring LicenseHQ to Fit Your Needs | 2 Hours | Intermediate |
| Close the Compliance Gap with the LicenseHQ Forms Database | 2 Hours | Basic |
| Manage Your Data: Imports and Batch Functions in LicenseHQ | 2 Hours | Basic |
| Build a Clear Compliance Picture with Reports in LicenseHQ | 2 Hours | Basic |
| Custom Training for the Advanced LicenseHQ User | TBD | Intermediate |



To access training courses, log in to [Connections](#) and click **Learn, Learn Home**.