TRAINING GUIDE

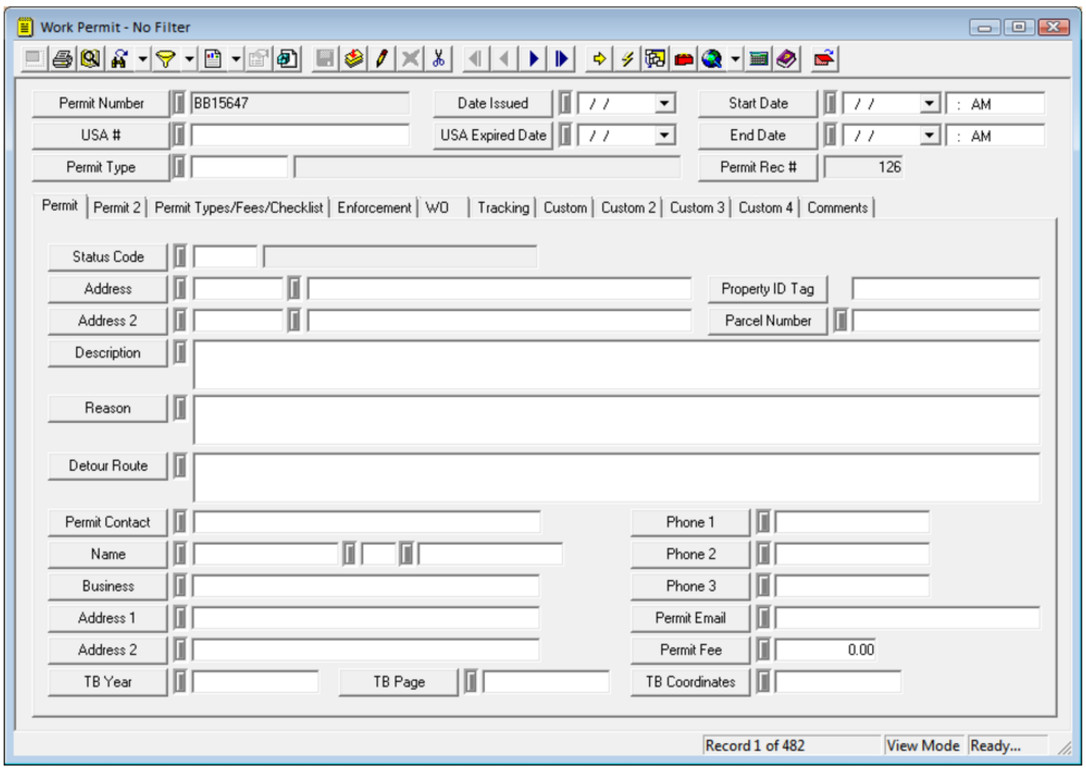
Work Permits

Work Permits

Contents

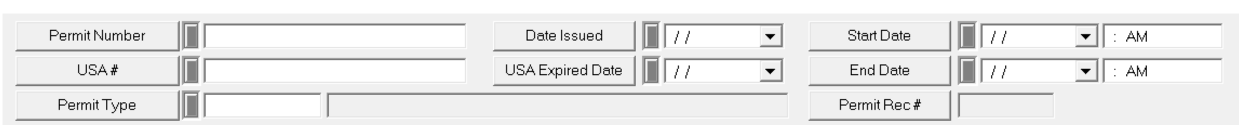
Work Permits

The Work Permit modules allow users to create and track work permits and perform some setup that helps automate part of the permit creation process. The Permit Type Setup allows users to speed up filling out a work permit record. It allows an agency to setup several standard permits types and their associated fees. They can then attach other fee information and checklist items. When a permit type is added to the permit record all of the attached fees and checklist items are brought over too. The work Permits module allows users to track permits issued for work needs and can link them to existing work orders.

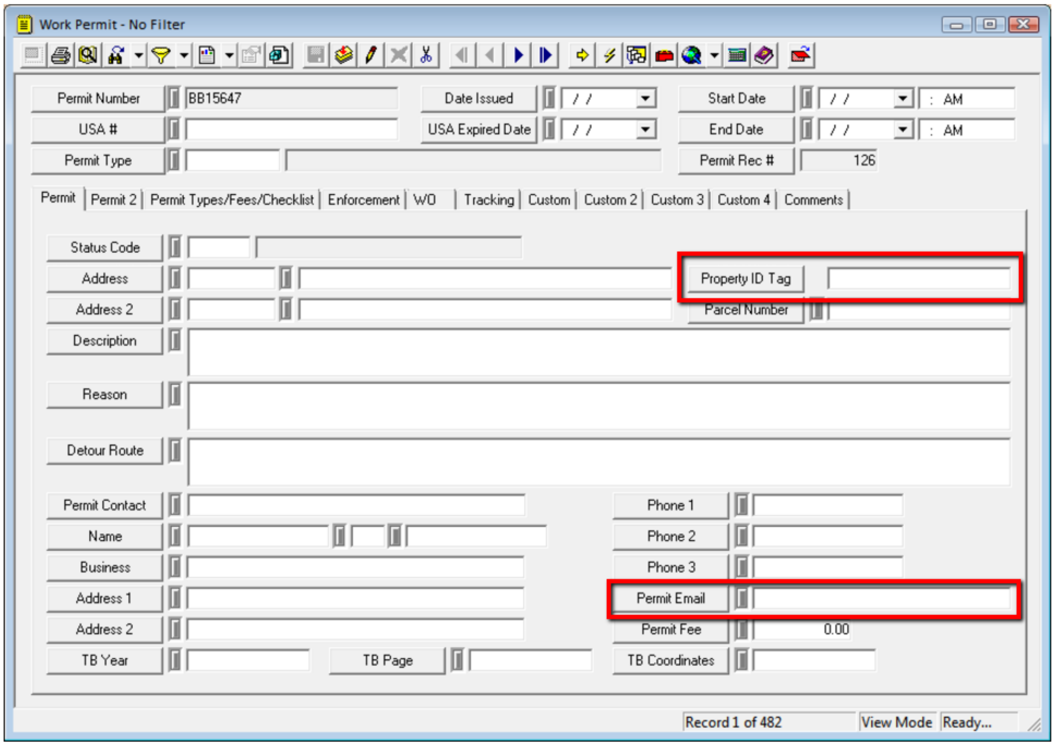


Permit Number is the ID for the permit and is automatically generated by the system. The format of the number can be changed in the Work Options.

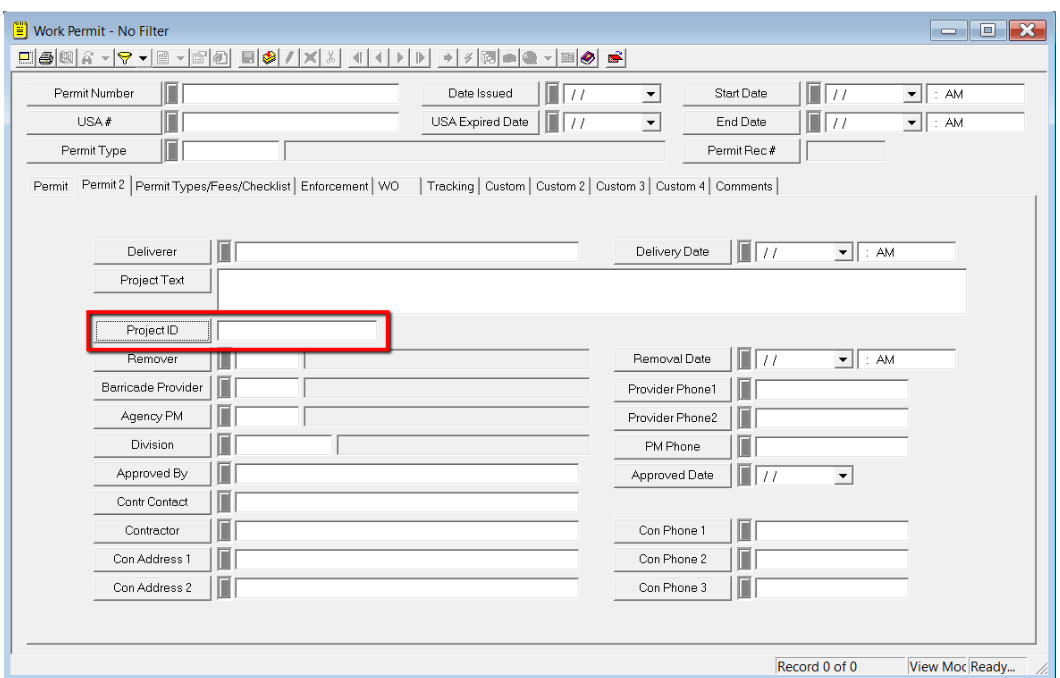
The USA Number is an alternate ID that users can enter. The Permit Type is a pick list field that allows users to indicate the type of permit being created. (i.e.: Special Use, Construction, etc.)The Date fields are used to record when the permit was issued and when it will expire. The Permit Rec # is a system record number that is automatically generated when a record is created and saved.



The **Property ID Tag** links the permit record to a record in the **Customer Address** module, the users can also populate the **Permit Email** with a valid email and the recipient will receive notification emails that are sent from the permit toolkit.



Permit 2 Tab has a field called **Project ID** that links the permit to a project in the **Project** module



Permit Types/Fees/Checklist

The ***Permit Types/Fees/Checklist*** tab contains three grids which allow users to select multiple permit types, assign fee items, and populate a checklist. The ***Fee Items***, and ***Checklist grids*** are tied to the ***Permit Types*** grid. That means that the fee items, and the checklist that appear in the other grids depend on the record selected in the Permit type grid. The grids on this page can also be populated using the Permit Type Setup module. In that module users setup a permit type with all of its fees and checklist items. Users can then load the setup record into the Permit Types grid and populate all the other grids automatically.

Permit Types Grid

The ***Permit Types*** grid allows users to assign multiple permit types. All records in the Fee Items grid and Checklist grid are tied to the record that is selected in this grid.

A sample of the grid appears below

Permit Type	Permit Type Text	Permit Type Fee

- Right-click in the grid to add a record
- Right-click on an existing record to get a menu with options to **View Record**, **Add Record**, **Edit Record**, **Delete Record**, or **Load Permit Type**.
- Double-click on an existing record to open it

Fee Items Grid

The ***Fee*** grid allows users to assign fee items to the permit.

A sample of the grid appears below

Fee Item	Fee Item Text	Fee

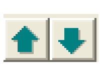
- Right-click in the grid to add a record
- Right-click on an existing record to get a menu with options to **View Record**, **Add Record**, **Edit Record**, or **Delete Record**.
- Double-click on an existing record to open it

Checklist Grid

The ***Checklist*** grid allows users to add checklist items to a permit.

A sample of the grid appears below

No	Checklist	Pass Text	Scheduled Date	Date Performed	Status Text

- Right-click in the grid to add a record
- Right-click on an existing record to get a menu with options to **View Record**, **Add Record**, **Edit Record**, **Delete Record**, or **Populate Pass Code**.
- Double-click on an existing record to open it
-  At the bottom of the grid there are reorder arrows. Select a checklist item in the grid and use the up down arrows to change its position in the checklist.

Enforcement Tab

The ***Enforcement*** tab stores information about organizations and persons that received enforcement notices and the actions they took in response.

The first grid records information about the organization or user who received the enforcement notice. The second grid shows the types of actions associated with the record selected in the first grid.

Samples of the grids appear below. Sort records in each grid by clicking on the headings. An up or down arrow (highlighted in orange below) indicates whether data appear in ascending or descending order.

Enforcement Grid

Date Recorded	Name	Title	Business

- Right-click in the grid to add a record.
- Right-click on an existing record for options to **View Record**, **Add Record**, **Edit Record**, or **Delete Record**.
- Double-click on an existing record to open it.

Enforcement Type Grid

Select a record in the ***Enforcement*** grid to see the related ***Enforcement Type*** records.

Date Recorded	Enforcement Type	Enforcement Type Text	Sent Date	Due Date	Completed

- Right-click in the grid to add a record.
- Right-click on an existing record for options to **View Record**, **Add Record**, **Edit Record**, or **Delete Record**.
- Double-click on an existing record to open it.

Notes:

WO Tab

The ***WO*** tab contains two grids which display all work orders and Daily inspections associated to the permit.

Work Orders Grid

The ***Work Orders*** grid contains a list of work orders associated to the permit.

A sample of the grid appears below. Sort records in each grid by clicking on the headings. An up or down arrow (highlighted in orange below) will appear signifying ascending or descending order.

Work Order #	Category	Main Task	Status	Status Date	End Date	Start Date

- Right-click in the grid to link to a record.
- Right-click on an existing record to get a menu with options to **Go to Linked Work Order**, **Link to Existing Work Order**, or **Remove Link**.
- Double-click on an existing record to open it.

Daily Inspections Grid

The ***Daily Inspections*** grid contains a list of daily work inspections that are attached to work orders. This grid is populated automatically when a work order is added to the ***Work Order*** grid. It is also tied to the work order grid meaning that the inspections that appear depend on the work order currently selected in the ***Work Order*** grid.

A sample of the grid appears below. Sort records in each grid by clicking on the headings. An up or down arrow (highlighted in orange below) will appear signifying ascending or descending order.

Inspection Date	Report #	Employee Name	Master Project ID	Master Project Name	Sub-Project ID	Sub-Project Name

- Right-click on an existing record to get a menu with options to **View Record**, or **Edit Record**.
- Double-click on an existing record to open it.

Tracking Tab

The ***Tracking*** tab contains a grid that tracks email notifications sent out for the permit.

A sample of the grid appears below. Sort records in each grid by clicking on the headings. An up or down arrow (highlighted in orange below) will appear signifying ascending or descending order.

Tracked Item	Description	By	Date	Time

- This grid is for information purposes and contains no user functions.

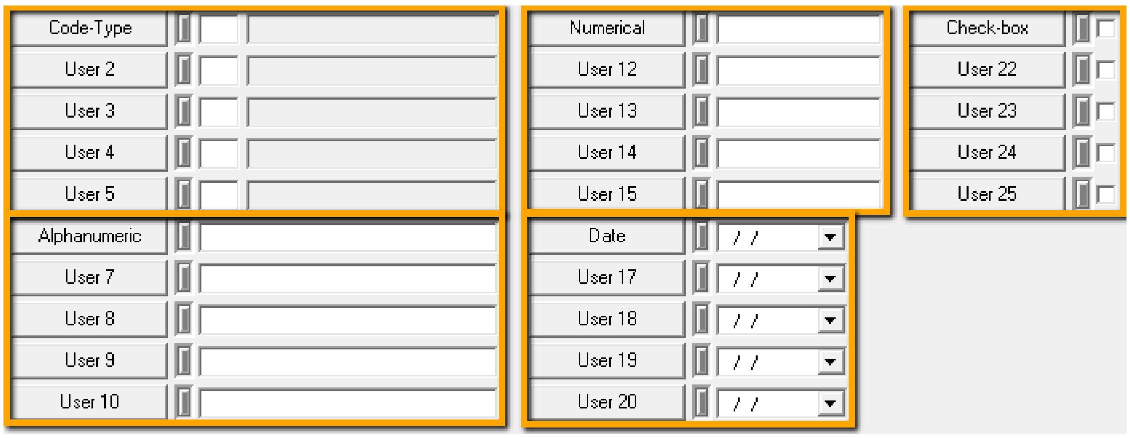
Notes:

Custom Tab(s)

The ***Custom*** tab(s) provide a variety of empty fields that agencies may customize to meet their needs. The number of custom tabs or fields available varies by module.

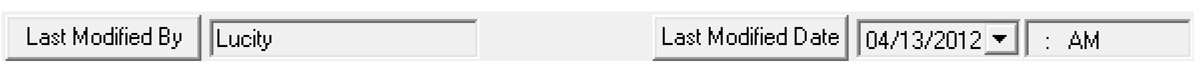
Standard Custom Field Types

- ***Code-type*** - User-defined, pick list fields.
- ***Alphanumeric*** - Allows users to enter letters or numbers in any combination.
- ***Check-box*** - Used to indicate yes/no or on/off.
- ***Numerical*** - Accepts numbers only.
- ***Date*** - Provides a popup calendar, allowing the user to select a date.



Last Modified Fields

In some instances, the ***Custom*** tab tracks the last user that modified the record and when it was modified.



Other Fields

The ***Custom*** tab also might contain some of the following fields, depending on the module in which it appears.

- ***Short Comment*** - This is a text field that enables the user to store additional comments.
- ***Work Order***, ***WO***, or ***Work Comment*** - This is a text field that allows information to be carried over to a work order for this specific asset.
- ***Sub-Type Text*** - This field is automatically completed if ***Sub-Types*** are defined in the GIS system.

> **Note:** Users can only edit this field in the GIS geodatabase environment. If the system is not integrated with GIS, this field is not available.

- **X and Y coordinates** - Such fields are used to locate the asset.

Comments Tab

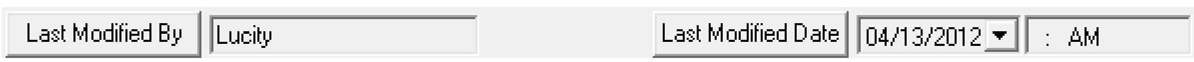
The ***Comments tab*** allows users to enter additional notes. All ***Comment*** tabs contain a ***Comments*** field. Some also contain a ***Comments*** grid.

Comments Field

At the top of the ***Comments*** tab is a large text field. While in **Add** or **Edit** mode, click in the field and begin typing. This field has copy/paste abilities, provides for carriage returns **<Ctrl + Enter>**, and includes a spell checker that, when turned on, will underline misspelled words as they are typed.

Last Modified Fields

In some instances, the ***Comments*** tab also tracks the last user that modified the record and when it was modified.



Comments Grid

Comment grids allow different users to enter and share comments. Each comment is time-stamped upon submission.

A sample of the grid appears below. Sort records in the grid by clicking on the headings. An up or down arrow (highlighted in orange below) indicates whether data appear in ascending or descending order.

- Right-click in the grid to add a record.
- Right-click on an existing record for options to **View Record**, **Add Record**, **Edit Record**, or **Delete Record**.
- Double-click on an existing record to open it.

Notes:

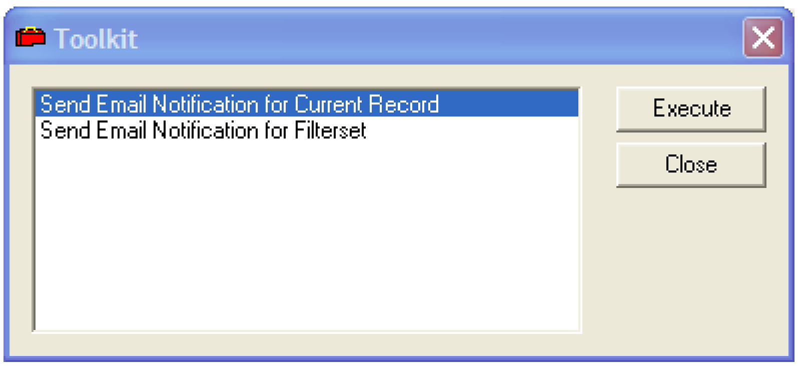
Toolkit

The Toolkit in this module provides these functions:

Function	Result
Send Email Notification for Current Record	Sends an Email notification to the contact for the current record.
Send Email Notification for Filterset	Sends an email notification to all the contacts for the current filterset.

How to Run a Toolkit Function

1. Before running any tool that affects a filterset, create a filter for the records that should be updated.
2. Click the  button in the module toolbar. The following window will appear:



3. Highlight one of the toolkit functions and click 

Notes: