
Document Number

IAM2017152

Short Guide

IAMPermit

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Version: 2.0 [Definitive]




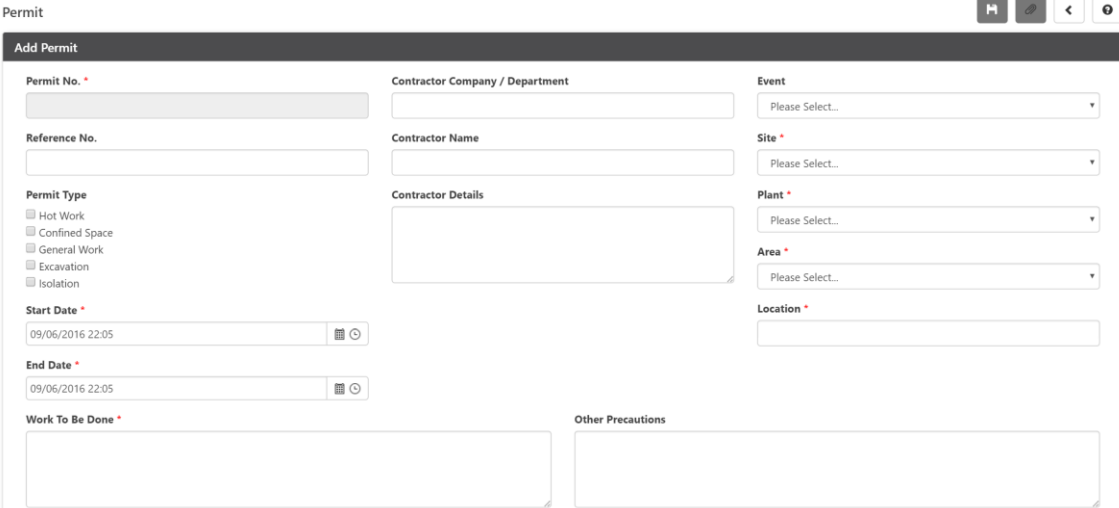
This short guide will help you to get to grips with IAMPermit our easy to use, cost effective permit to work software.

1.0 CREATE YOUR FIRST PERMIT

After logging in, click on the 'Permits' link in the menu at the top of the screen

How do I add a new permit?

Click the add new permit icon  and you will be shown the Add Permit screen.



1. All fields marked with an asterisk are mandatory
2. Selecting your Permit types will load the associated precaution questions (These precaution questions can be modified using the 'Questions' screen available on the main menu)
3. Your Permit No. can be entered manually, or if configured in the Configuration can be set to auto number. Please note if set to auto number then the field will remain blank and you will not be able to enter a number – the system will enter one once you save the Permit by

clicking on the save icon




Permit life cycle stages explained!

When you first create a permit and populate it, once you have clicked save, the permit is considered to be at stage 'Created'.

When you click save, you will leave the Add Permit screen and return to the permit list.

The second phase of the permit lifecycle is the checking of your permit, this could be done by yourself or one of your colleagues (as long as they have a user account to the software).

To progress your permit – you need to click the Edit icon  and scroll through the permit, checking you are happy with what has been entered, when satisfied the permit is correct, then scroll down to 'Permit Check'

Permit Check

Permit Check

Accepted

Rejected



Checked By

Date Checked

Comments

You can either Accept or Reject the Permit.

When you click the Accept button your name and date will automatically populate the Checked By and Date Checked fields.

Then click the scroll icon  which will take you back to the top of the Permit, then click the Save icon  - congratulations your Permit is now checked, you will be returned to the Permit management screen.

The third stage is making your Permit 'Live'. Instructions on this can be found over the page.

Permit Issue & Acceptance

Area Clean & Tidy

Clean & Tidy

Needs Work

Permit Acceptor(s)

Please Select...

Acceptor	Sign On Date *	Sign Off Date
Gordon Ashman	25/01/2016 02:00	
Mark James	25/01/2016 06:00	

Permit Issue

Issue Permit (will become live)

Not Ready to Issue Permit

Renewal Frequency (hours) *

4

Issued By

Paul Shergold

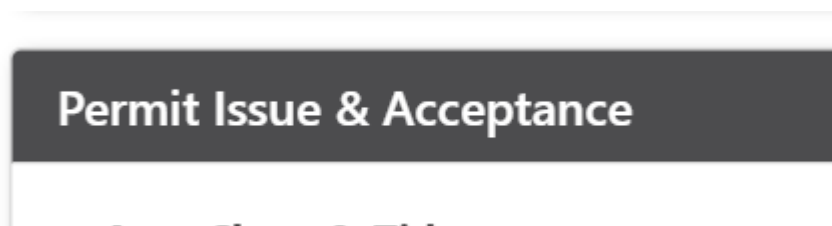
Date Issued

21/04/2016 13:40

Comments

As with the Permit check stage, open your Permit from the Permit management screen.











Scroll down to the Permit Issue and Acceptance section.





Add any personnel working under the permit using the fields shown below.


Permit Acceptor(s)

Please Select... ▾

Acceptor	Sign On Date *	Sign Off Date
Gordon Ashman	25/01/2016 02:00  	<input type="text"/>   
Mark James	25/01/2016 06:00  	<input type="text"/>   



Then click the scroll icon  which will take you back to the top of the Permit, then click the Save icon  - congratulations your Permit is now Live, you will be returned to the Permit management screen.


You now have two options (1) If the Permit needs to exist beyond a single work shift then you are able to renew the same permit using the Permit Renewal screen shown at the top of the following page.

Permit Renewal 



Acceptor *
Please Select... ▾

Issuer *
Please Select... ▾

Date *
09/06/2016 22:41  




Date	Acceptor	Issuer
This Permit has not been Renewed.		


Then click the scroll icon  which will take you back to the top of the Permit, then click the Save icon  - congratulations your Permit is now renewed, you will be returned to the Permit management screen.

To close out a Permit, as with the Permit 'Live', open your Permit from the Permit management screen.


Scroll down to the Permit Handover section.

Complete the necessary fields, including any test runs you may have performed on your plant equipment.

Then click the scroll icon  which will take you back to the top of the Permit, then click the Save

icon  - congratulations your Permit is now 'Closed', you will be returned to the Permit management screen.

2.0 ADMINISTRATE THE CHOICES IN THE DROPDOWN MENUS

All values in the drop-down menus of the permit form can be administrated by Clicking on the settings icon  takes you to the 'Configuration navigation' menu.

3.0 FOR MORE COMPREHENSIVE INSTRUCTIONS BEYOND THIS SHORT GUIDE

Please click on the 'User Manual' link in the Navigation Menu at the top of the screen