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**Document Number**

IAM2016137

**Quick User Guide**

**IAMPermit**

**Issue Date: 11<sup>th</sup> October 2017**

**Version: 8.1 [Definitive]**



**IAMTech**

EXPERIENCE NOT THEORY.

A CPD LIMITED COMPANY

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## 1.0 Logging in to IAMPermit

Open a web browser – ideally Google Chrome, if not Chrome, then Internet Explorer 10.0 or above.

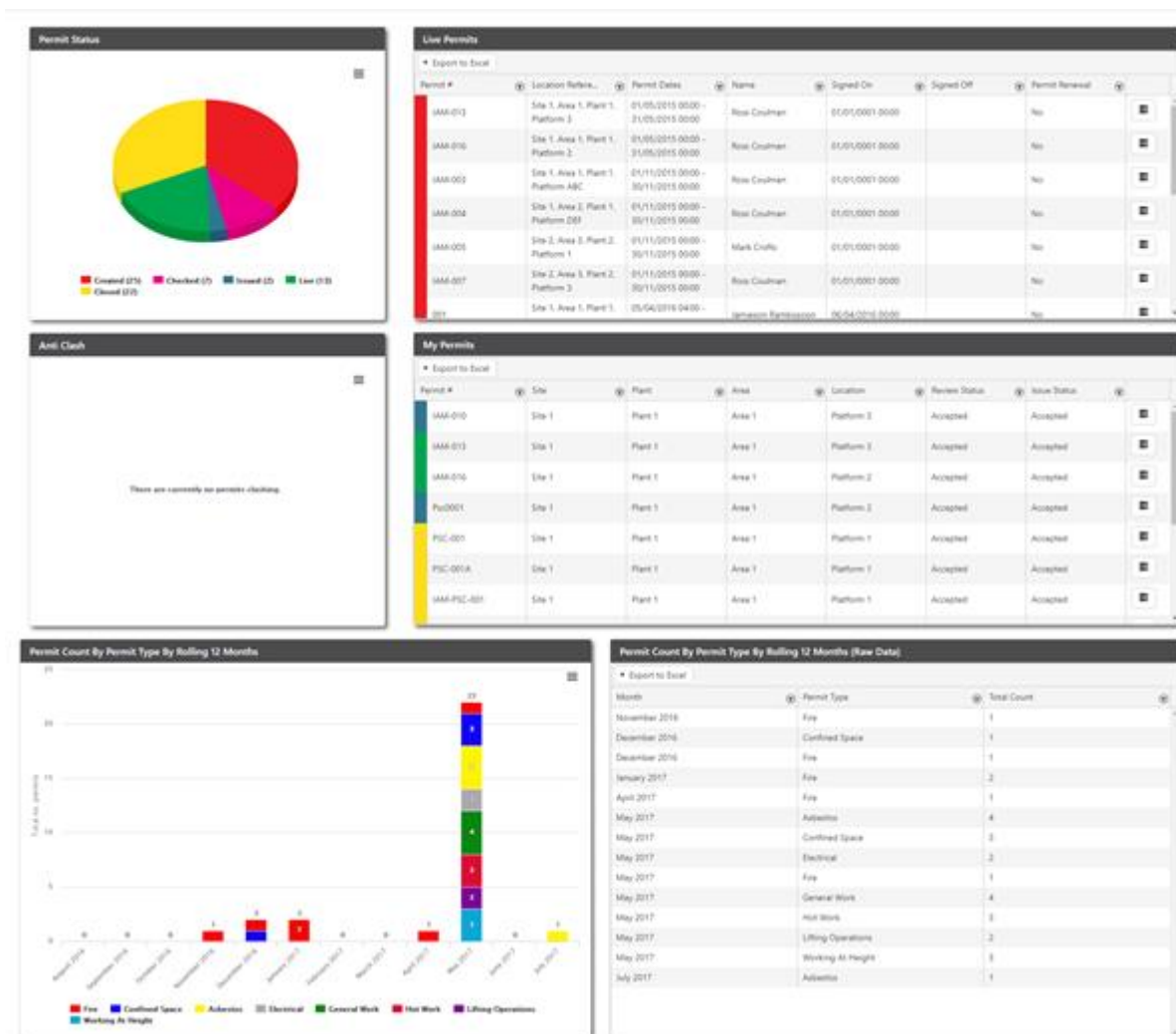
Please Note: IAMPermit runs in Microsoft Edge, but we cannot currently assure all features will behave as designed.

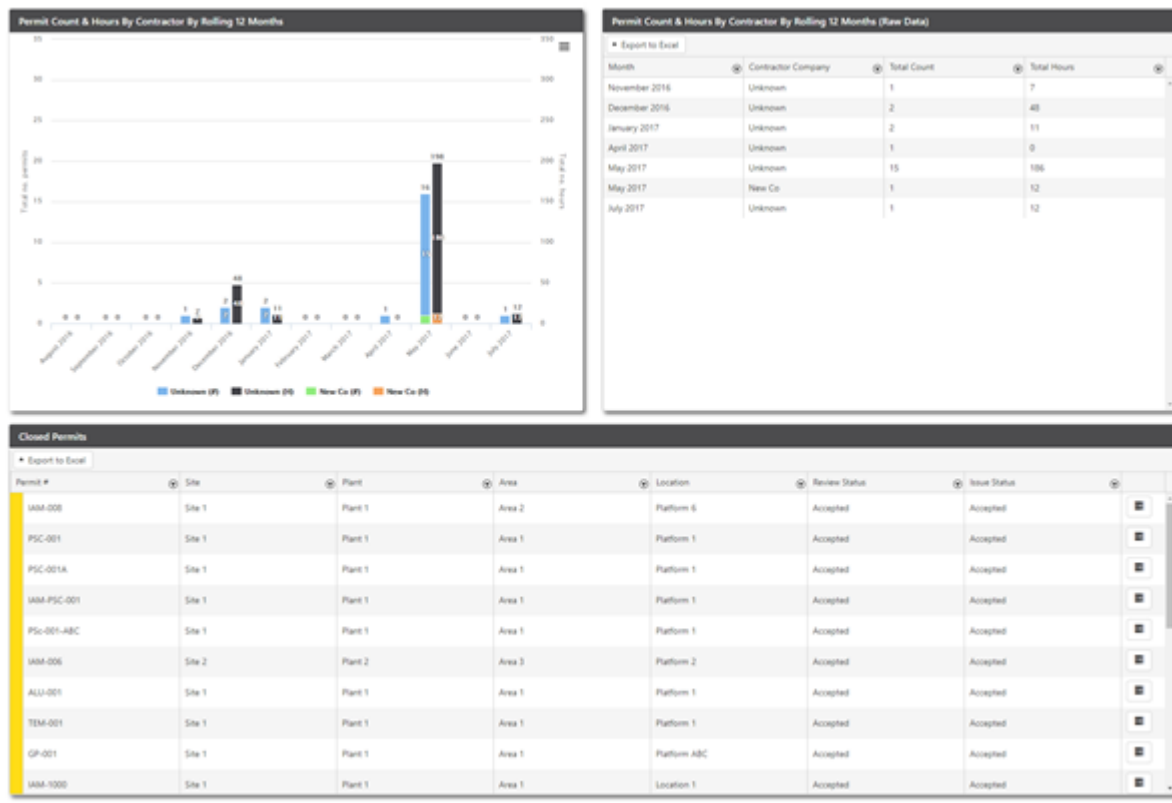
Enter the following web address <http://mobile.cpd-limited.com/#/login>

Enter your username and password as provided by IAMTech Support (Please note if using chrome, pasting username and password from our email may insert an extra space character, please therefore type the details provided in to the username and password boxes).

## 2.0 Permit Dashboard

Once logged in you will be shown the IAMPermit dashboard with the navigation menu across the top of the screen.





On the dashboard you will see;

- A pie chart representing all of your permits by their status's (Created, Checked, Issued, Live, Closed)
- A list of any live permits
- A list of any permits you as a user are associated with
- A list of all permits that have been closed

Each of the grids (tables) can be exported to Excel individually by clicking the Export to Excel button. This can be useful for compiling your own reports.

### 3.0 [Navigation](#)

To move around the screens within IAMPermit just head for the navigation bar at the top of the application screen. Whenever you load a new screen or perform an action, a blue bar will grow from left to right – PLEASE do not click again, please wait until the bar gets all of the way across.



**Dashboard** – Will take you to the screen as described in 2.0 above

**Permits** – Will show you a list of all Permits within the software

**Anti-Clash** – Will show you a list of all Permits within the software which exist in the same location at the same time to help you manage resources and prevent congestion of workers in the same work environment.

**Short Guide** – Allows you to open a short guide to get you quickly started


**User Manual** – Allows you to open this user manual as a PDF in a browser window


**T&Cs** – Here you will find our terms of use for IAMPermit.

Administrative Navigation can be found in the top right-hand corner of the navigation menu and looks like this;



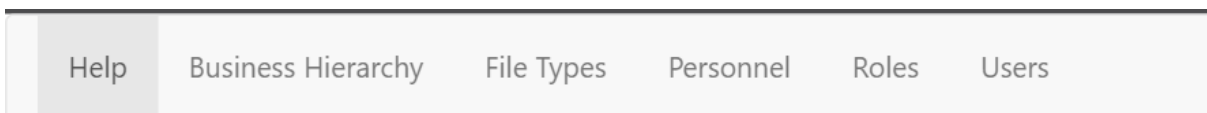
Clicking on the user icon  allows you to change your password.

Clicking on the settings icon  takes you to the 'Configuration navigation' menu.

Clicking on the exit icon  logs you out and takes you back to the IAMTech Mobile log in screen.

Clicking on the help icon  opens the User Manual also.

## 4.0 [Configuration Navigation](#)



**Business Hierarchy** – On this screen you can configure your company's asset hierarchy e.g. Site A, Plant 1, Area C

**Events** – On this screen you can create events – such as 'Plant Shutdown 2016'

**Permit Types** – On this screen you can define your types of Permits

**Question Types** – On this screen you can create types of questions

**Questions** – On this screen you can create any questions you would like to see on any Permit.

**Permit Activities** – On this screen you create Permit activities and link them to a Permit type.

**File Types** – On this screen you can create a list of 'File Types'

**Personnel** – On this screen you can manage your IAMPermit personnel (Please note these can include people whose names will be listed on your permits, but who may not be end users of the IAMPermit software)

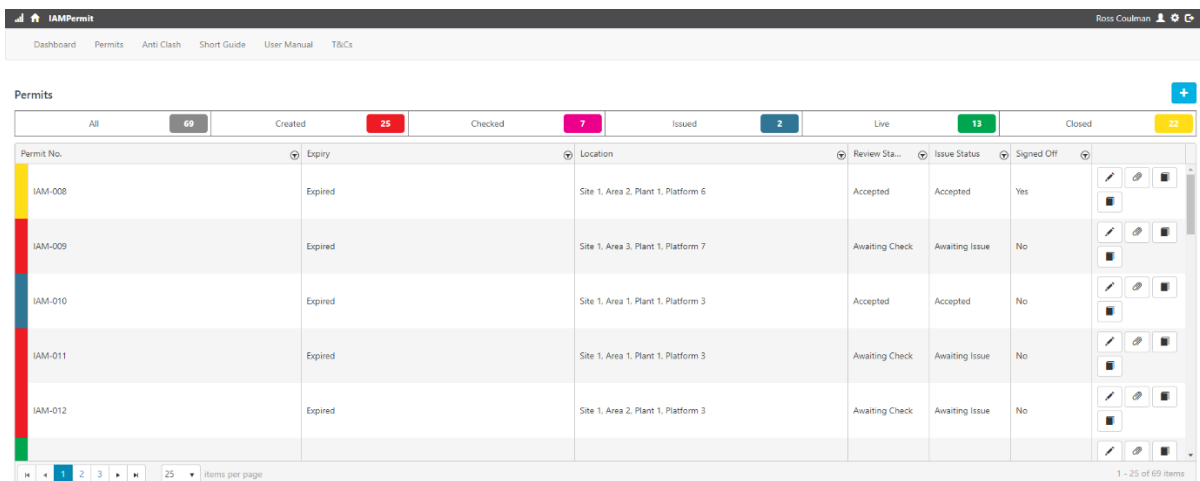
**Roles** – On this screen you can manage the permissions of each User role

**Users** – On this screen you can create new users of the software and assign their roles



To EXIT the Configuration Menu, click on  in the top left-hand corner of your screen.

## 5.0 Permits Screen



Permit No.	Expiry	Location	Review Sta...	Issue Status	Signed Off
IAM-008	Expired	Site 1, Area 2, Plant 1, Platform 6	Accepted	Accepted	Yes
IAM-009	Expired	Site 1, Area 3, Plant 1, Platform 7	Awaiting Check	Awaiting Issue	No
IAM-010	Expired	Site 1, Area 1, Plant 1, Platform 3	Accepted	Accepted	No
IAM-011	Expired	Site 1, Area 1, Plant 1, Platform 3	Awaiting Check	Awaiting Issue	No
IAM-012	Expired	Site 1, Area 2, Plant 1, Platform 3	Awaiting Check	Awaiting Issue	No

At the top of the Permit management screen you are given total counts of the number of permits at each stage of the Permit lifecycle





Permits	All	Created	Live	Closed
	5	3	1	1


To open a Permit listed select the Edit icon  on the right hand of your chosen permits row




IS0016	Expired	Imperial Park, Paint Plant, IP1, Spray booth opt-centre	Accepted	Accepted	Yes	
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To attach and / or output a Permit click on the Expand / Collapse icon  to the left of a Permits row


To attach pictures or documents to a Permit click the Attachment icon 

To output a Permit, click on the Output Permit icon  this will create a PDF with the Permits ID number, which can then be downloaded, saved wherever you wished and printed.

## How do I add a new permit?

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

Permit

  
**Add Permit**

<b>Permit No. *</b> <input type="text"/>	<b>Contractor Company / Department</b> <input type="text"/>	<b>Event</b> Please Select... <input type="text"/>
<b>Reference No.</b> <input type="text"/>	<b>Contractor Name</b> <input type="text"/>	<b>Site *</b> Please Select... <input type="text"/>
<b>Permit Type</b> <input type="checkbox"/> Hot Work <input type="checkbox"/> Confined Space <input type="checkbox"/> General Work <input type="checkbox"/> Excavation <input type="checkbox"/> Isolation	<b>Contractor Details</b> <input type="text"/>	<b>Plant *</b> Please Select... <input type="text"/>
<b>Start Date *</b> 09/06/2016 22:05 <input type="text"/>		<b>Area *</b> Please Select... <input type="text"/>
<b>End Date *</b> 09/06/2016 22:05 <input type="text"/>		<b>Location *</b> <input type="text"/>
<b>Work To Be Done *</b> <input type="text"/>	<b>Other Precautions</b> <input type="text"/>	

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'

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

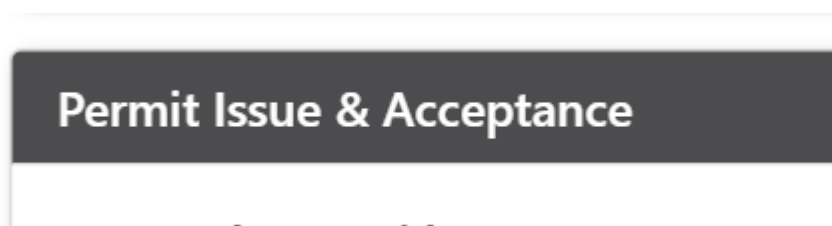
icon  - congratulations your Permit is now checked, you will be returned to the Permit management screen.

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

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

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 \***

**Issuer \***

**Date \***   



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.

### How do I delete an existing permit?



Click the above icon and you will be shown the Edit Permit screen.



Click the above icon to delete the permit.

## Permit Types

### How do I add a new permit type?



Click the above icon and you will be shown the Add Permit Type screen.

### How do I edit an existing permit type?



Click the above icon and you will be shown the Edit Permit Type screen.

### How do I delete an existing permit type?



Click the above icon and you will be shown the Edit Permit Type screen.



Click the above icon to delete the permit type.

## Precautions (Questions)



Click the above icon and you will be shown the following Add Question form:


**Add Question**  
**Permit Type \***  
Demo Type  
**Question Type \***  
Precautions  
**Cloning**  
 Allow question to be cloned when creating a Permit  
**Question \***  
This is an example question. With a response type of yes / no which will give a checkbox option.  
**Response Type \***  
Yes / No  
**Order \***  
1

The Response type drop down list will allow you to customise the responses, for example Yes / No will display a check box, Dropdown will allow you to create a dropdown list of specific values.



Click the icon to save your changes.



Click the above icon to edit an existing question. When editing a question, the  icon can be used to delete it.

When the questions have been created they will be visible on the permit screen when the appropriate permit type is selected.


### Demo Type

#### Precautions

This is an example question. With a response type of yes / no which will give a checkbox option.



When creating a question if the “Allow question to be cloned when creating a Permit” option is

selected then the  icon will be visible next to the question, pressing this will duplicate the question on the Permit.

## Work Type

### How do I add a new Work Type?



Click the above icon and you will be shown the Add Event screen.

### How do I edit an existing Work Type?



Click the above icon and you will be shown the Edit Event screen for the selected event.

### How do I delete an existing Work Type?





Click the above icon and you will be shown the Edit Event screen for the selected event.



Click the above icon to delete the event.

## 6.0 User Administration

### How do I create a new user account?

1. On the main menu click on the  cog icon.
2. Next click on the  add icon.
3. Enter a unique user name.
4. Enter the e-mail address.
5. Enter and confirm a strong password.
6. Select any personnel types as required.

Personnel Type	Details
Supervisor	N/A in IAMPermit
Employee	N/A in IAMPermit
Permit Acceptor	User will appear in the Permit Acceptor dropdown list at the Permit issue and renewal stages
Permit Issuer	User will appear in the Issuer dropdown list during the permit renewal stage
Permit Sign Off	User will appear in the Permit sign off dropdown list in the Permit Handover stage
Client	N/A in IAMPermit

7. Assign at least one role (roles govern what the user can do once logged into the system).

8. Click on the  save icon.

Note: The user can reset their own password once they have logged in for the first time.

Note: The password must be at least 8 characters long, include at least 1 number and include at least 1 special character e.g. @!&\*.