

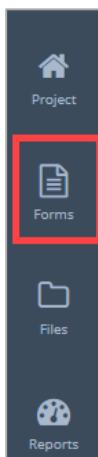
Permits

This document will be used to capture all permits issued for the project. This includes any permit issued by any regulatory or other agency. This document is typically created by the vendor responsible for obtaining the permit.

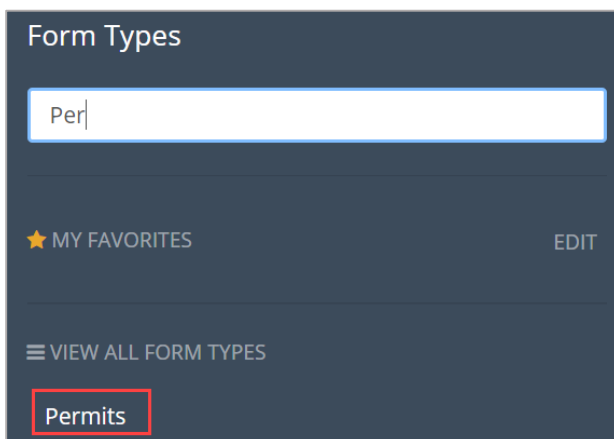
This form should be created when the permit is applied for and edited as the permit process progresses and the permit is issued.

Creating a Permit

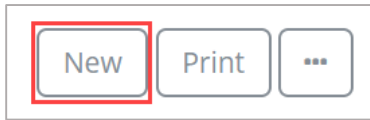
1. Within the project, click the **Forms** icon on the left navigation pane or if you have set up Permits as part of your Favorite Forms, you can select this form from the Project Home page.



2. In the search field, begin typing **Per** and the form will appear in the forms list. Click the **form name** to open the log.



- To create a Permit form, click the **New** button.



- Enter the title of the Permit in the **Subject** field.

Subject * Required

Type the Subject

- Begin typing the name of the **Permitting Agency** or click inside the field to show the list of companies to select from.

Permitting Agency

- Click inside the **Permit Type** field to display a list of options. Click the title of the appropriate type to select the item.

Permit Type

- Check the box for the **Revision** field if this is a new revision of the permit.

Revision

☐

- Click inside the **Permit Applied For Date** and select the date. *This should be added when the permit has been applied for.*

Permit Applied For Date

< February 2020 >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
01	02	03	04	05	06	07

9. Click inside the **Permit Issued Date** and select the date. *This should be added when the permit has been issued.*

Permit Issued Date


March 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04
05	06	07	08	09	10	11

10. Enter the **Permit Number**.

Permit Number

11. Enter additional information in the **Notes/Comments**.

Notes/Comments



12. Press the **Save & Share** button located in the top right corner and share with the appropriate groups.

Cancel

Save & Share

Editing a Permit

1. Open the **Permit** log and click the **title of the Permit** you wish to edit.

Subject	Created On	Shared
Permit #1	2/19/20 12:55 PM	1

2. Click the **Edit** button in the Details section of the form.

DETAILS

Subject
Permit #1

Permitting Agency

Permit Type

Revision

Permit Applied For Date

Permit Issued Date

Permit Number

Notes/Comments

3. Make the appropriate changes to the form and press the drop down arrow beside **Save & Share** to share the document or **Save** without sharing.

Cancel **Save & Share** ▼