

# PERMITS AND INSPECTIONS

The **Permit** module will capture all relevant information for permits and inspections, and allow the user to monitor expiration information for them.

To navigate to the Permits, click **Project Forms**, then **Forms** (submenu), then **Permit** from the left hand menu. This displays the overall **Manager View** for the module and shows all records for all projects.

To search for an existing document, use the columns to filter for the data you need. For example, use the Record# column to search for a document. You can also narrow your search by school name by selecting it from the **Projects** drop down menu.

To add a new document, click the **Add** button.



The screenshot displays the software's navigation menu on the left and a data table on the right. The menu includes categories like PLANNING, PROJECT FORMS (highlighted with a red arrow), COST MANAGEMENT, SCHEDULING, ASSET MANAGEMEN..., WORKFLOW, PORTFOLIO, TOOLBOX, and EXIT. Under PROJECT FORMS, there is a sub-menu for CUSTOM FORMS, with 'Permit' selected (indicated by a red arrow).

The data table below has a search bar with 'Delivery Me\*All\*' and a 'Projects' dropdown set to '5240-N10-16-0AEN - 160AEN - Ne'. A red box highlights the '+' button in the table's toolbar. The table columns are: PROJECT NAME, SDA NUMBER, RECORD #, DESCRIPTION, WORKFLOW STATUS, TO, FROM, TRADE, and REFERENCE.

PROJECT NAME	SDA NUMBER	RECORD #	DESCRIPTION	WORKFLOW STATUS	TO	FROM	TRADE	REFERENCE





Enter the following information in the document:

- Project (**required**)
- Date Issued
- Description
- Coordinator
- Permit Number – date of permit
- Contract Number

Once completed, click the **Save** button to continue.



5240-N10-16-OAEN - 160AEN - NewGrade 7 to 9 School (Union City) > Project Forms > Forms > PERMIT > 1 -

MAIN

### Permit

#### New Jersey Schools Development Authority

**Project:** 5240-N10-16-OAEN - 160AEN - NewGrade 7 to 9

**Date Issued:** 10-03-2023

**Description:** Roofing


**Coordinator:** New Jersey Schools Development A

**Permit Number:** 10/3/23

**Contract Number:** CA-0001-C01

### Inspections

INSPECTIONS

 Refresh

ITEM NO.	DCA DATE	SDA DATE	CLOSED	ITEM TYPE	PERMIT OR INSPECTION OF
No records to display.					

1 PAGE SIZE 20

In the Inspections section, click the **Add** button to enter an item(s).

## Inspections

INSPECTIONS

ITEM NO.	DCA DATE	SDA DATE	CLOSED	ITEM TYPE	PERMIT OR INSPECTION OF	INSPECTION
No records to display.						

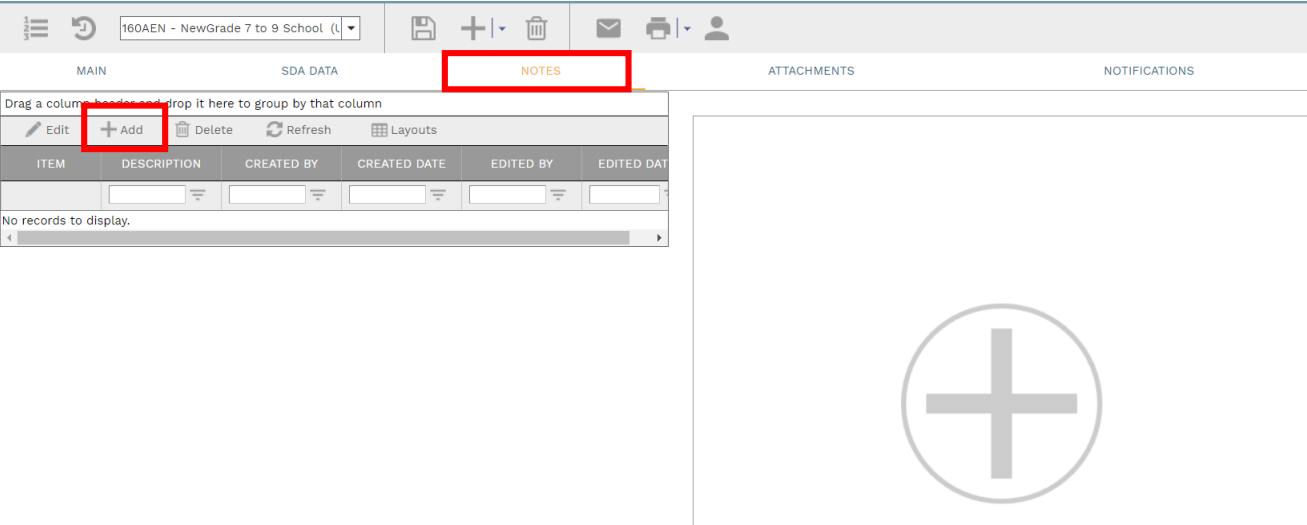
Navigation: 1 | PAGE SIZE: 20

Enter the applicable permit/inspection information on the peach-colored line. Use the various drop down boxes to complete your information. Click **Save** when completed.

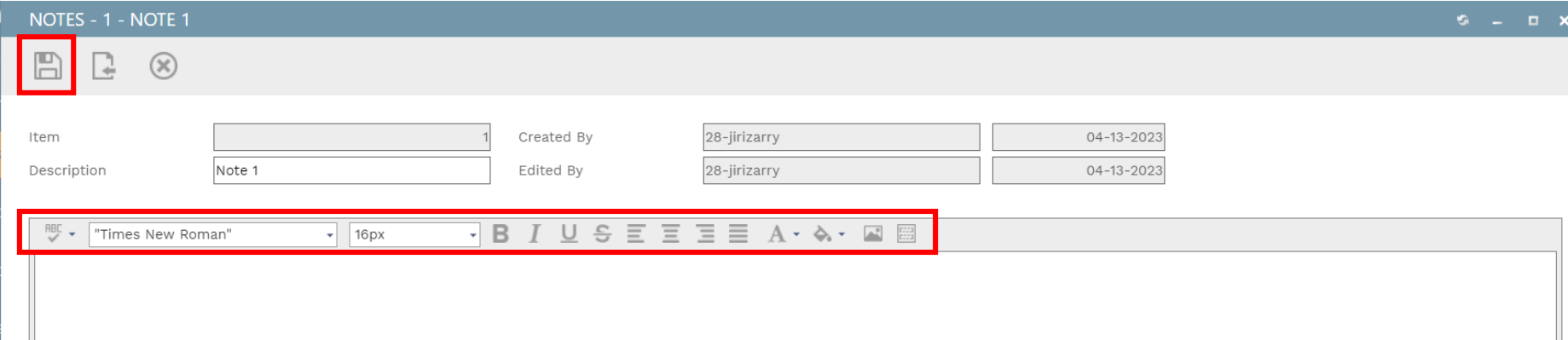
ITEM NO.	DCA DATE	SDA DATE	CLOSED	ITEM TYPE	PERMIT OR INSPECTION OF	INSPECTION

Navigation: 1 | PAGE SIZE: 20

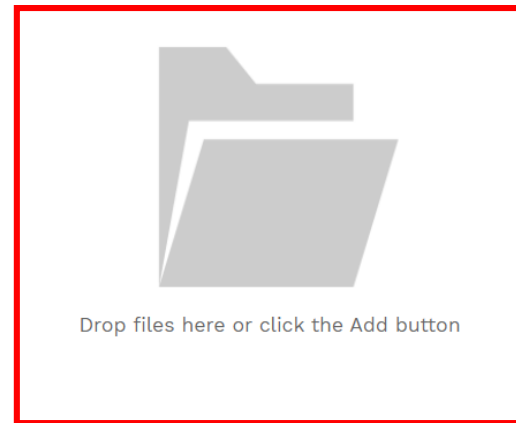
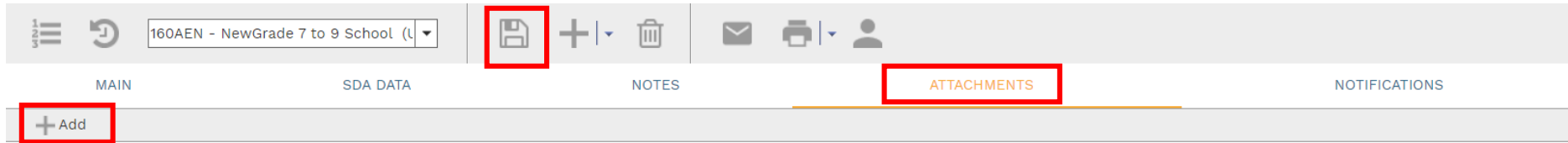
Click **Add** on the **Notes tab** to add additional notes as needed.



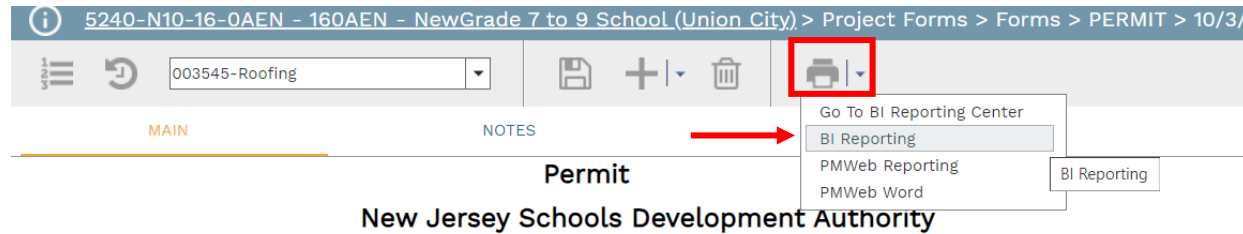
Enter your notes in the field provided. The text can be formatted using the toolbar shown. There is no limit to the amount of text you can enter. Click the **Save** button when completed.



On the **Attachments tab**, you can drag-and-drop your desired attachment(s) in the middle section of the screen, or you can choose **Add** to manually navigate to the location of your attachment on your computer, and add it through that window. Repeat the process for all additional attachments. Click the **Save** button when finished.



To print Permit information, click the **print button** in the Header section and select **BI Reporting** from the drop down list. Choose an option from the report menu (click the magnifying glass) to receive your output or to cancel the Reports Preview screen.



Project: 5240-N10-16-OAEN - 160AEN - NewGrade 7 to 9  
Date Issued: 10-03-2023

### Permit New Jersey Schools Development Authority

The 'Reports Preview' window is shown. On the left, there is a table with the following data:

Report	Record Type	Default
SDA_PermitReport	Permit	<input checked="" type="checkbox"/>
1		

On the right, the 'Preview' section displays the 'STATE OF NEW JERSEY SCHOOLS DEVELOPMENT AUTHORITY' logo and the text 'ALL PERMITS / DCA INSPECTIONS'. Below this, there are three report preview cards. The first card shows:

Project Name: [blank] Description: [blank]  
Date Issued: 10/30/2019 Permit: 1  
Coordinator: [blank]  
Contract: [blank]

Item No.	DCA Date	SDA Date	Closed	Item Type	Inspection Of	Inspection Status	No

The second card shows:

Project Name: 000604 - Peterstown E.S. #3 (Elizabeth) Description: [blank]  
Date Issued: 05/08/2021 Permit: 1  
Coordinator: [blank]  
Contract: [blank]

Item No.	DCA Date	SDA Date	Closed	Item Type	Inspection Of	Inspection Status	No

The third card shows:

Project Name: 010556 - Number 3 E.S. (West New York) Description: Cmnts: Delayed Entry Locks  
Date Issued: 01/12/2012 Permit: 12JAN12  
Coordinator: Chris Meggin (SCHOOLS DEVELOPMENT AUTHORITY)  
Contract: [blank]

Item No.	DCA Date	SDA Date	Closed	Item Type	Inspection Of	Inspection Status	No
00001	01/12/2012					New Item	NY 04 009; ERU 6090 04. F

At the bottom of the window, there are five buttons: 'Print To PDF', 'Print To Excel', 'Send Email', 'Report Viewer', and 'Cancel'. A red arrow points to the 'Print To PDF' button.

**Note:** Please be patient when waiting for output from a selected report. It may take a few minutes to load the data.



A **Workflow** is an automatic process initiated for the review of a document. Individuals who are responsible for reviewing, submitting information or approving the document have already been identified for this project and module.

On the **Workflow tab**, click the **Submit** button to begin the workflow process. The information for this workflow is shown, click **Save** to continue and initiate the workflow. Enter comments or additional email addresses if needed. As the document moves through the review/approval process, you will be able to come back to this screen to see the progress.

ACTIONS

BUSINESS PROCESS

WORKFLOW LOG

**EMAIL PREVIEW**

Subject: PMWeb Approval Request: RFIs 00001 -- 966 - 160AEN - NewGrade 7 to 9 School (Union City) - Utility Disconj

Comments: [Empty text area]

Email Body: A document has been Submitted for approval by Jennifer Irizarry.

**Workflow Document Information:**

- Document type: RFIs
- RFI #: 00001 -- 966
- Project Name: 160AEN - NewGrade 7 to 9 School (Union City)
- Contract: HU-0029-N01
- Document Description: Utility Disconnects

Add CC: [Input field]

DROP FILES HERE OR CLICK TO ADD

**BUSINESS PROCESS**

#	TYPE	ALL MUST APPROVE?	DUE DATE	ROLE	USER	DELEGATE	INSTRUCTIONS
	[User icon]	<input type="checkbox"/>		-- Submitter --			
1	[Group icon]			-- APM --	Prevent Submit if Category Blank		A value other than "Please select a value" is required to select to branch workflow.





You will be able to monitor the progress of the workflow process by referring to the Workflow Status field. If the document is returned at any point along the way, you will be able to modify as needed and resubmit the document in the workflow process.

Project	5240-N10-16-0AEN - 160AEN - NewG	▼
RFI #*	00001 -- 966	
Description	Utility Disconnects **MK:cdb67b19966c	
Contract #	HU-0029-N01	
Status	Draft	▼
		0

