

## Electronic Permit Creation and Approval

*At the worksite, or at the planning stage (for later completion at the site)*

*All types of permits, e.g. Hot Work, Confined Space Entry, Working at Height*

*Expandable/collapsible permit creation form*

*User-defined permit questions and prompts for answers*

*Atmosphere Test section*

*Isolations section*

*Attachment upload (photos/documents)*

*Mandatory uploads or answers before permit can be approved*

*Real signatures, by person performing the work and the supervisor/person in charge, captured electronically*

## Visualisation: Plot Plans, POB Listing, Gantt Chart, Statistics

### Electronic Permit Board

- View concurrent jobs for each site
- Colour coding according to type

### Plot Plan

- View all current permits in their locations on the plan
- Permits are colour coded according to type
- Alerts for permits that have expired

### Google View

- View work sites on Google Map
- View overview of all current permits on each location
- Click on map to open plot plan (or permit listing, if no plot plan exists) of site, showing permits in their location

### Home Screen

- List active permits
- List permits requiring an action (e.g. approval or handback)

### POB Screen

- List personnel, their location and the permit they are working on

### Gantt Charts

- View current/upcoming work on a Gantt Chart for a location

*Statistics dashboard – number of permits, per month, per area, per type*

## Permit Actions / Lifecycle – from creation to closeout:

**Create**

**Issue**

**Submit for approval**

**Reject**

- Customisable 'Reject Reasons' dropdown list

**Approve (by authorised users)**

- Signature Feature
- Approval Rights defined at permit, user and site level

**Suspend/Re-instate**

**Add spot checks**

**Sign into permit to add extra personnel**

## **Hand back permits**

**Hand back and create follow-up permit**

**Close**

**Unique Permit ID created automatically**

## **Multi-level user Authorisations and Permit Sign Rights**

**Defined at user, permit and area/site level**

**Different authority levels of users: create/edit/reject/suspend/add spot checks/view history/add company on edit screen, add email recipients**

**User sign rights customisable to: Asbestos/Atmosphere/Confined Space/Excavations/General Permits/Height/Hot Work/Isolation/Moving Machinery/PPE**

**Permit sign rights defined for each separate site, so user can sign permits for some sites, and not for others.**

**Stop Creator from approving / stop approver from issuing**

**Optional approval by Area Authority before issue**

## **Print**

**Print paper copies for display at the worksite**

**Save to .pdf format**

## **Permit Tracking, Listing, Search and View**

**List all permits requiring action**

**List and view current and historic permits**

**Filter permit listing or search by:**

- Contractor company
- Work Sites and Areas
- Validity dates
- Permit Description
- Permit Type
- Permit ID Number
- Permits involving user's own company
- User's own permits

**Sort permit listing by**

- Permit ID Number
- Company
- Area
- Description
- Issue or validity dates
- Signatory
- Permit Status

**Permit History**

**Colour Coding of permits**

- On Permit Listing
- On Permit Board
- On Plot Plan
- On Google Maps

## Permit Form Customisation

Fully customisable Permit to Work forms and buttons

Fully customisable questions

Fully customisable answer fields – free form, drop-down selection, check boxes, date selectors

'In Use' Feature for question sets – prevent alteration of for already existing permits.

Create, edit and delete questions

Make answers to questions mandatory

Question sets

Version control for question sets

Export Questions to Excel

## Email Notifications and Workflow Management

Automatic email notifications

Email notifications to group email addresses

Permits can be assigned to specific area managers

Approval by authorised user

Automatic check for completeness of Permit before sign-off

Alerts for expired permits

Method Statement upload can be made mandatory

Risk Assessment upload can be made mandatory

## Import / Export Data Feature

Export Permit Data to Excel file

Import/Export Users to Excel file

## System Customisation by 'Admin Users':

- User Creation
- Import / Export lists of users
- Assign different levels of user: admin/management
- Password Re-set Email generation
- Archival

Creation of Permit Questions, Question Sets, Answer types and on-screen hints

Terminology Setup: define all terminology on user screens

Permit Reject Reasons Setup

Sites and Work Area

- Create new work sites
- Create new work areas within a site
- Assign area manager

Contractor Companies

- Add, edit and delete contractor companies
- Add contractor personnel

Set up automatic email notifications to HSE Manager and Environmental Manager

## Contractor Management Module

- Monitor Contractors' documents, e.g. certificates and insurances, add attachments
- Add attachments
- Allocate contractor companies to work sites
- Approve contractor companies to work at specific sites

## Isolations Module

- Track Isolations: Isolation Point, type & status
- Approve isolations – use real signatures
- Customise Isolation Types e.g. electrical, mechanical, process, instruments
- Customise Isolation Statuses – e.g. closed, locked, open, locked open, isolated

Cloud-based or Self-hosted