Quick Start Guide: Permix Web –Contractors or Subcontractors

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This Quick Start Guide has been developed for use with the web version of Permix for use by contractors and subcontractors. It is current as of August 2019.

For assistance with Permix related questions, please contact us at DOT.Permix@iowadot.us .

Contents

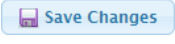# Quick Start Guide: Permix Web – Contractors or Subcontractors

1. Log Into Permix

All Non-IDOT Staff users access the Permix web application with username and password login.

- Access https://idot.permix.net/ (you can save this as a favorite)
- Type username and password in fields provided. If you forget your password, there is an option is provided to send a password reminder.
- An administrator for each new company is created by IDOT. This administrator or anyone from your company (with system privileges to add new users) can the add new users for your company. Typically, IDOT **will not** manage your company's users, their passwords, privileges, or project assignments. If you do not have an account, check with another Permix user from your company for access (they may refer to Section 2 of this guide). Or if additional assistance is required, you may contact DOT.Permix@iowadot.us.
- *Note: For Consultants providing support for RCE Offices, see "Quick Start Guide: Permix Web for DOT staff or DOT consultants" beyond this point.*
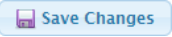
2. Add User to My Company

Each Company adds their own new users. The ability to add new users is a privilege assigned within a User Profile. *See Section 16* for description of privileges. If the "Edit Users" privilege is not enabled, functions are not available to add a new user.

- Click My Company [My Company] button located in the top gold banner
- Review any existing users displayed on Company Staff List
    - If the user email exists anywhere in Permix, they cannot have another account added
    - Moving a user from one Company to another Company (if the same email address is to be used) is a System Admin task. Contact DOT.Permix@iowadot.us for assistance.
- Click [Add New Staff Person]
- Fill out required fields (yellow) and optional fields for the new User
    - An ECT Certification number or IowaDOTU username is helpful, but both can be added by the user later if not known. You may look up certification numbers here: https://iowadot.gov/training/CertTechBook.pdf
- Click [Save Changes] (No confirmation is displayed, but a welcome email is sent to the User)
- **Don't forget to then assign privileges to this new user.** See Section 3 (next section) for instructions.
- If you are the prime contractor, do <u>not</u> add a subcontractor employee as a user from your company. The subcontractor would add their own new users. Or if additional assistance is needed, you may contact DOT.Permix@iowadot.us.

3. Assign Privileges to New Users

After creating a User Account, the User Privileges must be established for their profile in Permix. See *Section 16* for description of privilege settings. Also, User privileges may be modified any time by clicking My Company and locating the user to edit.

Settings

- Click Settings button 👤 associated with the User profile to edit
    - User and Organization cannot be edited
    - Check the Privileges to enable for the User (see Section 16 for more info)
        - **Can edit projects**
        - **Can edit users**
        - **Can manage documents**
- Click Save Changes

4. New User Notification and Password Management

New users will receive a welcome notification when their User Profile has been created. This welcome email text below contains login instructions to get started with logging in and updating profile settings.

Welcome to Iowa DOT Permix! A new user account has been created for you to support stormwater management reporting requirements. To access Permix, please visit www.idot.permix.net to log in.

Your user name is:

Your password is:

You can change your username or password at any time. Click on My Company and the Edit icon next to your name. Make sure your contact information, IDOT erosion control training, username and profile are set the way you want them. Be sure to click Save after making any changes.

Click the Projects button to see your projects list. Based on your settings and your project assignments you may have the ability to edit project information, upload project documents, manage other users within your organization or support weekly inspections.

If you are responsible for managing users for your company, use the My Company; Add New Staff Person button to create new users.
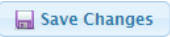
5. Disable User Profile

A user can be removed from all projects and all privileges disabled. These actions must be completed by a DOT system administrator. To disable a User account so they cannot login to IDOT Permix, send an email to DOT.Permix@iowadot.us requesting what user needs to be disabled.

6. Assign/Unassign Users to my Company Projects

Adding one user to many projects at the same time is completed through the My Company functions.

- Click My Company **My Company** button located in the top gold banner

- Click Project Assignments **Project Assignments** associated with the User profile to edit

- Use Page Filter and check or uncheck the boxes for projects to assign or unassign the user to

- If a box is grey and checked ✓ , the user is assigned to the project as the Prime Contractor inspector and cannot be disabled from this screen.

- Click **Save Changes**

7. View/Edit Individual Project User Assignments

Adding many users to one project at the same time is provided through the Project Information – Assignments functions. The prime contractor can add a user from the prime contractor or a subcontractor user to a project. However, a subcontractor would only be able to add someone from the same subcontractor.

See *Section 16* for description of privileges.

- Click Projects **Projects** button located in the top gold banner

- Click Info Icon **Info** associated with the project record

- Click Assignments button **Assignments**

- Click Organization Type to add
  - **Prime Contractor Users** (anyone from *assigned Prime Contractor Company).* Note: if the user from your company does not exist, they will have to first be added as a new user (see Section 2 of this guide).
  - **Subcontractor Users** (anyone from subcontractor company). Note: if the user from the subcontractor does not exist, contact a Permix user from the subcontractor or DOT.Permix@iowadot.us to create an account for this new user.

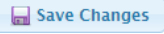 Click to enable or disable users to add or remove from the project.
- You may also click on red X to remove a user from your project.
- Click **Save Changes**

8. View/Edit/Disable User Settings to Individual Project

When a User has been added to a project, their assigned privileges can be adjusted for an individual project. Default settings are enabled when a user is assigned to the project, but they may be modified from the default settings by following the steps below. See *Section 16* for description of privileges. Privileges that are not enabled for a user base/default settings cannot be enabled for an individual project, but an enabled base/default privilege may be disabled for an individual project.
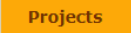
- Click Projects **Projects** button located in the top gold banner

- Click Info icon **Info** associated with the project record

- Click Assignments button 🧑‍🤝‍🧑 Assignments

  Edit
- Click Edit icon 🔧 associated with the user record to edit
  - Check the Privileges to enable for the User
    - **Can edit projects**
   - **Can edit users**
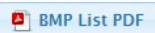   - **Can manage documents**
- Click 💾 Save Changes

9. View/Edit Individual Project Information (including Prime Contractor Inspector)

The Project Information screen provides important details about project information and gives access to view project assignments.

- Click Projects 🟧 Projects button located in the top gold banner

  Info
- Click Info Icon 🖼️ associated with the project record
- Scroll down until you see "Project Information"
  - If "Prime Contractor Inspector" is blank and you have the privilege to edit projects, you can enter a user from your company as "Prime Contractor Inspector". This is the individual that will receive notifications of inspection reports that require signoff. If "Prime Contractor Inspector" is currently filled but you would like it changed, contact the DOT inspector or DOT.Permix@iowadot.us to make this change.

10. View Project BMP List Information

A List of Project Best Management Practices (BMPs) is maintained with the project. The BMP list can be accessed from two locations described below.

- Click Projects 🟧 Projects button located in the top gold banner

  BMP
  List
- Click BMP List icon 📌⁴ associated with the project record
- The Project Information screen 🖼️ also provide a button 📌 BMP List to access the BMP List.
- Key BMP List Page functions include:
  - 🗺️ BMP Map View Project BMP Map (if available)
  - Access BMP Edit screen by clicking the desired BMP Type name such as
    TURF REINFORCEMENT MAT, TYPE 2
  - 🟢 🟡 🔴 Accessing the BMP on the Map by clicking the round action status indicators
  - 🕐 Unresolved Actions ! Access the Unresolved Action items
  - 📄 BMP List PDF Print BMP List PDF

11. Produce a PDF of BMP List Using Filters

A PDF of the BMP List can be generated from the BMP List screen.

- Access the BMP List screen as described above ![BMP List].

- Click the BMP List PDF button ![BMP List PDF] to generate the document.

- Save or send the document as needed. IDOT Permix does not retain this file for you.
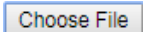
12. View/Print Pending Action Items

BMPs will have pending Action Items that require some action. This information is entered by the DOT or DOT consultant inspectors.

At any time during the project, a list of the Pending Action Items can be viewed, and a Punch List can be generated.
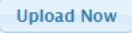
- Access the BMP List screen as described above.

- Click the Unresolved Actions button ![Unresolved Actions !], an ! indicates Pending Action Items exist

- Click the Punch List PDF button ![Punch List PDF] to generate the document

- Save or send the document as needed. IDOT Permix does not retain this file.

13. View/Upload Project Documents

Documents can be uploaded to the Project Documents page. Uploads may be completed by the Prime Contractor, not subcontractors. The user must be enabled to manage documents. See *Section 16* for description of privileges. Some documents may require an acknowledgement by IDOT Staff that they were received. The steps below describe how to view and upload documents.

- Click Projects ![Projects] button located in the top gold banner

- Click Documents icon ![Docs] associated with the project record

- The Project Information screen also provides a button ![Documents] to access the Documents List

- To view an uploaded document, locate the document to view and click the PDF icon ![PDF] to view, save and/or send it.

- To upload a new document, locate the document type you want to upload;
    - Each section is a different document type and click upload button ![Upload a New Document]
    - Click ![Choose File]
    - Navigate to the file you want to upload to the project
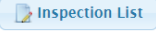
- o Click **Upload Now** to confirm or **Cancel** to stop the upload from proceeding
- o Review the document name, size and upload date
- Uploaded documents cannot be deleted from a project at this time.

14. View/Sign Project Inspection Reports

Completed inspections are stored on the Inspection Reports page of a project. If the inspection report was not signed off on the DOT inspector's iPad, the report may be signed from the Inspection List screen.

To view an inspection report, follow the steps below.

- Click Projects **Projects** button located in the top gold banner
- Click Inspections icon **Insp List** ² associated with the project record
- The Project Information screen also provides a button **Inspection List** to access the Inspection List

- To view a completed inspection, locate the inspection and click the PDF icon to view, save and/or send it.

  To sign an inspection report, follow the two-step process below.
- Access the inspection list as described above.
- First click Signoff Inspection **Signoff Inspection** button to access the signoff screen.
- Then click the Signoff Inspection **Signoff Inspection** button again to put your name and sign off date on the report record.

15. View Summary Reports

Users will have access to a growing list of summary reports where information about multiple projects can be viewed at one time.

- Click Summary Reports **Summary Reports ›** button located in the top gold banner. Currently, the following reports are available:
  - o Inspection Reports, Action Items

16. Additional Information on Privileges

The recommended settings (P, U, D) are described in **Table 1**.

- Prime Contractors Recommended Settings
  - o Can edit projects (P)
  - o Can edit users (U)
  - o Can manage documents (D)

- Sub-Contractors Recommended Settings
  - Can edit users (U)

Default Profile Privilege Setup

Every user has a default set of profile privileges setup when a user profile is created or edited. The recommendations above may be adjusted based on the actual responsibilities the user is expected to fulfil for their company and projects.

Table 1 provides a description of what each privilege type means when the user is assigned to a project. When a user is first assigned to a project, their default privilege settings are applied. If a user does not have a privilege enabled on the profile level, it cannot be enabled for the user on a project level.

Table 1 – User Profile Privilege Descriptions

Default Privileges	Purpose of Default Privilege
Edit Projects (P)	With this privilege, a Prime Contractor user can add the assigned Prime Contractor Inspector for a project if it has not already been assigned by IDOT staff. This privilege may be helpful when setting up projects. If the project already has a Prime Contractor Inspector assigned but the Prime Contractor would like to change it, IDOT staff would need to make this change. IDOT staff edit all other project information besides assignments.
Edit Users (U)	With this privilege, you will be able to update privileges of users from your same own company. You will also be able to add and remove users to a project from the My Company tab.
Manage Documents (D)	This privilege allows you to upload a document if you are from the Prime Contractor. Subcontractors are not allowed to upload documents, even if this privilege is enabled. Project documents are available to view by all users assigned to a project.
Weekly Inspections (W)	With this privilege, a Prime Contractor user that has a valid training certification and is assigned to the project may login and signoff on new inspection reports. Subcontractors never signoff on inspection reports.

If a default profile privilege is not desired for a user assigned to a project, that privilege may be disabled on the project level. For example, if the user has "manage documents" enabled with their profile, the privilege may be disabled on a specific project for which they don't need to upload documents. The user's privileges for other projects would remain unaffected by this project change.