

Quick Start Guide: Permix Web – DOT or DOT Consultants



Melissa Serio
melissa.serio@iowadot.us



DOT.Permix@iowadot.us

This Quick Start Guide has been developed for the **web** version of Permix for use by DOT staff or DOT consultants. It is current as of August 2019.

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

The Permix **web** version was developed primarily for RCE Office users, their assigned designees and administrative staff.

DOT inspectors will likely prefer using the Permix iPad app for inspector activities (such as completing reports). However, the same inspector activities can be performed in the web version. For instructions on using the iPad app, refer to the “Quick Start Guide – Permix App”. Since the iPad app is only available to DOT staff, consultant inspectors will be required to use the web version to complete inspections.

Items highlighted in **yellow** are primarily items that would be performed by an inspector. As noted, these items can also be performed on the iPad app version.

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For Permix related questions:
Iowa Department of Transportation

DOT.Permix@iowadot.us
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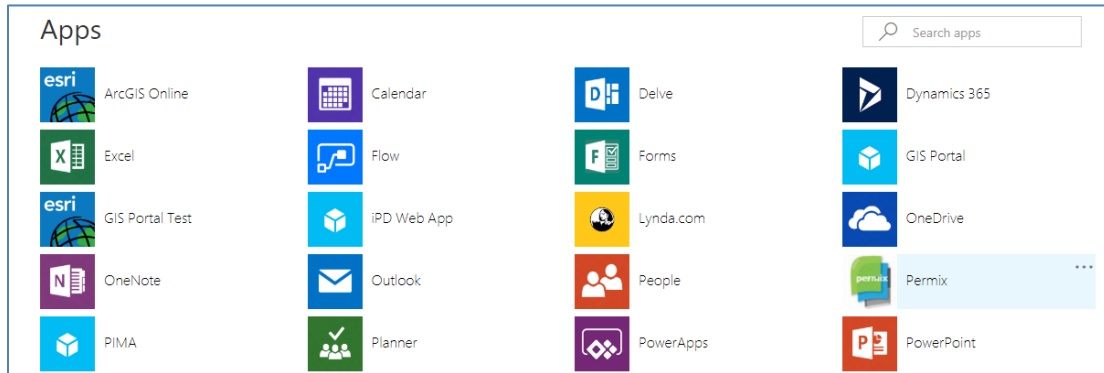
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1. Log into Permix

All **IDOT** staff access the Web application with their normal IDOT username and password login. If users are not familiar with this login process, the steps below guide users to login.

- Access <https://myapps.microsoft.com> (save this as a favorite)
- Type current IDOT username and password. IDOT Permix does not store this information.
- You should then see the below window and click the Permix icon



- If the Permix icon is not visible, IT needs to assign the link. Contact DOT.Permix@iowadot.us for assistance.

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 provided to send a password reminder.


If you do not have a Permix account, contact DOT.permix@iowadot.us for assistance.

2. Add User to My Office/Company

Permix allows for each RCE Office to add their own new Users. The ability to add new Users is a privilege assigned within a User Profile. See *Section 22, Additional Information on Privileges* for description of privileges. If the Manage Users privilege is not enabled, functions are not available to add a new User.

- Click **My Office** located in the top gold banner
- Review any existing users displayed on Office Staff List
 - If the user email exists anywhere in Permix, they cannot have another account added
 - Assigning or moving an Office User from one Office to another Office is a System Admin task. Contact DOT.permix@iowadot.us for assistance.
- Click **Add New Staff Person** at top of page
- Fill out required fields (yellow) and optional fields for the new User
 - **Important!** Email address must be an exact match to their IDOT issued email address.



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- 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>
- If an IDOT employee, check “Is IDOT Employee”. This allows them to login through myapps.microsoft.com and not to have a separate username and password for the system.
 - Username and Password are hidden when “Is IDOT Employee” is checked because system will use their IDOT credentials to log them in automatically.
- If not an IDOT employee, then provide a username and password. This information is sent to them in an email. The user can then change the initial password.
- Click 
 - No confirmation is displayed, but a welcome email is sent to the User.
- **Don’t forgot to then assign privileges to this new user.** See Section 3 (next section) for instructions.

3. Assign Privileges to New Users

Whether you have created a new user account or need to change an existing user’s access, the User Privileges must be established for their profile in Permix. User privileges may be modified any time. See *Section 22, Additional Information on Privileges* for description of Profile Roles and Privilege settings.

Settings

- Click  button associated with the User profile to edit
 - User, Portal and Organization cannot be edited by Office User
 - Select the Role Type for the User
 - **RCE/Designee** (this might be RCE, asst. RCE, Const. Tech Supervisor/Eng. Tech Senior, Secretary)
 - **DOT Field Staff** (any inspection staff for the RCE office)
 - **DOT Central Staff** (such as Central Construction, etc.)
 - **Consultant**
 - Check the Privileges to enable for the User
 - **Can edit projects**
 - **Can edit users**
 - **Can manage documents**
 - Check the Inspection Types to enable for the User
 - **Weekly** (This enables a user to conduct weekly inspections for all projects assigned to by default)
 - **Quality Assurance** (This enables user assigned to a project to be enabled at the project level to conduct Quality Assurance inspections. A user must be enabled to conduct Quality Assurance inspections and that assignment must also be made at the project level for the user to do so.)
- Click 

4. New User Notification and Password Management

New users receive a welcome email after their profile has been created. This email provides login instructions and how to update their profile. IDOT Users 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.

- **IDOT Employee Email:**

Welcome to Iowa DOT Permix! A new user account has been created for you to support stormwater management reporting requirements. To access Permix, please login to your Microsoft Applications panel at <https://myapps.microsoft.com> with your Azure account email and password, then click the Permix icon on the dashboard.

You can change your profile information once you've logged into Permix. Click on My Office and the Edit icon next to your name. Make sure your contact information and IDOT erosion control training information is set the way you want them. Then save the changes. If you are responsible for managing users for your office, use the Add New Staff Person button to create new users.

From there, click Projects and you will have access to your projects. Based on your settings and your project assignment you may have the ability to edit project information, upload project documents, manage other users within your office or conduct quality assurance or weekly inspections.

- **Non-IDOT email:**

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.




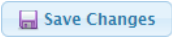
If you are responsible for managing users for your company, use the My Company; Add New Staff Person button to create new users.

5. Disable User Profile/Change User Office Assignment

To **disable** a User account so they cannot login to IDOT Permix or to **change** a user assignment from one RCE Office to another RCE Office, send an email to DOT.Permix@iowadot.us.




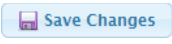
6. View/Edit User Assignments on Multiple Projects

To add **one user to many projects** at the same time:

- Click  button located in the top gold banner
- Click  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 a key role and cannot be disabled from this screen.
- Click 



7. View/Edit User Assignments on an Individual Project

Adding **many users to one project** at the same time is provided through the Project Information – Assignments functions. The ability to assign users from different organizations is controlled by Role and project privileges. See *Section 22, Additional Information on Privileges* for more information.



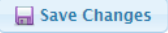
- Click  button located in the top gold banner
- Click  associated with the project record
- Click 
- Click Organization Type to add
 - **RCE Office Users** (anyone from RCE Office in Office Portal)
 - **IDOT Office Users** (anyone from non-RCE Office in Office Portal, such as Central Construction)
 - **Prime Contractor Users** (anyone from Company Portal)
 - **Subcontractor Users** (anyone from Company Portal)
- Click to enable or disable users from the Office to add or remove from the project
- Click 

8. View/Edit/Disable User Settings on an 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 22, Additional Information on Privileges* for description of privileges. Privileges that are not enabled for a user's default settings cannot be enabled for an individual project, but an enabled default privilege may be disabled for an individual project.

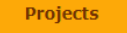

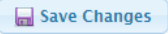
- Click  button located in the top gold banner
- Click  associated with the project record

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- Click 
- Edit
- Click  associated with the user record to edit
 - Check the Privileges to enable for the User
 - **Can edit projects**
 - **Can edit users**
 - **Can manage documents**
 - Check the Inspection Types to enable for the User
 - **Weekly**
 - **Quality Assurance** (If profile has enabled this inspection type, it may be enabled for this project. It is not enabled by default for the user.)
- Click 





9. View/Edit Individual Project Information

The Project Information screen provides important details about project information and gives access to view project assignments. The ability to View and Edit project information depends on a User's Role and privileges related to the project. See *Section 22, Additional Information on Privileges* for description of privileges that affect what is editable in the system based on Role and privilege settings.





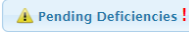
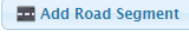

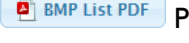
- Click  button located in the top gold banner
- Info
- Click  associated with the project record
- Edit field values displayed
 - Green fields are populated from other databases and may be overwritten by these databases. However, if a green field is blank and a user types something in, it will not be overwritten unless the database has a value.
 - White fields are populated by users and are not overwritten by other databases.
- Click 

10. View Project BMP List Information


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

- Click  button located in the top gold banner
- BMP List
- Click  icon associated with the project record
- The Project Information screen  also provides a  button to access the BMP List.
- Key BMP List Page functions include:

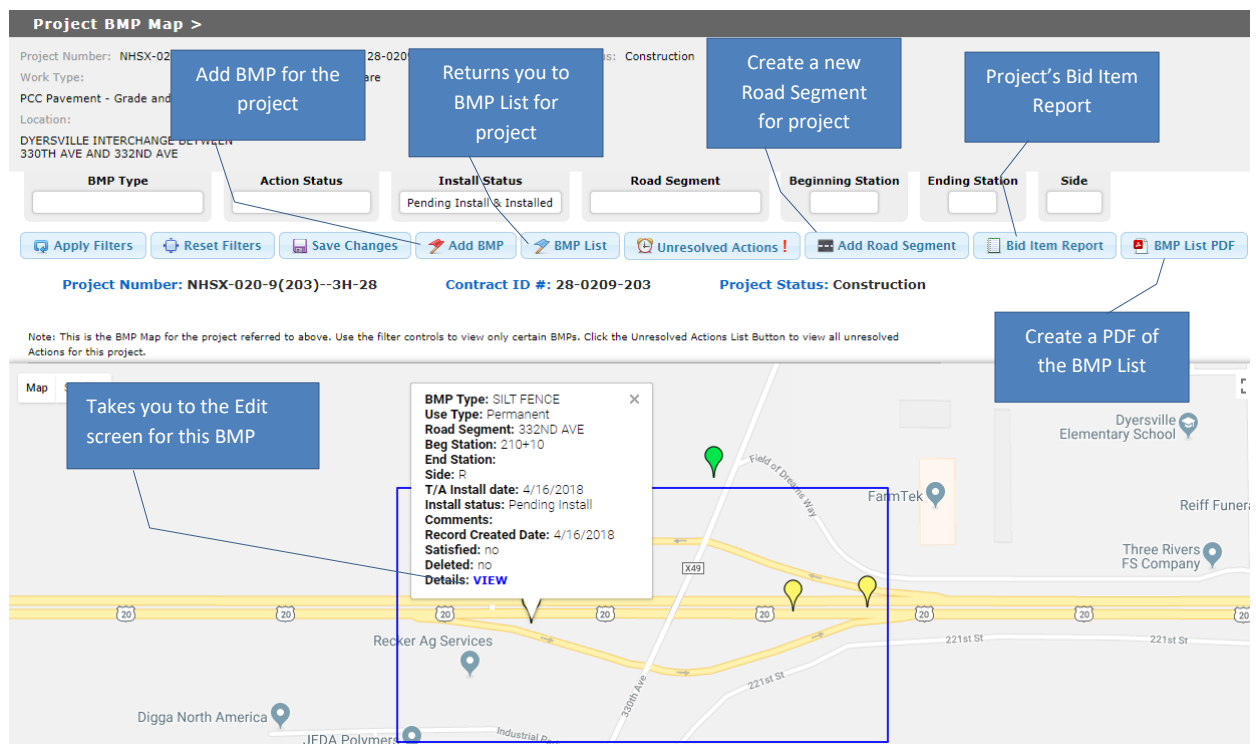
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-  Adding a BMP
-  View Project BMP Map
- **TURF REINFORCEMENT MAT, TYPE 2** This button provides access to BMP Edit screen by clicking the desired BMP Type name
-  Accessing the BMP on the Map by clicking the round action status indicators
-  Access the Unresolved Action items
-  Access the Pending Deficiency items
-  Add Road Segment
-  Access Bid Item Summary Report
-  Print BMP List PDF
- Completing bulk updates in the *Target/Actual Install Date* and *Satisfied* columns

11. View Project BMP Map Information


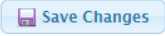

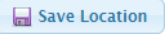
A Map of Project BMPs is maintained with the project record. The BMP map can be accessed from the Project BMP List by clicking the  button. The BMP Edit Screen also provides the same button to access the BMP Map.

(see next page for layout)





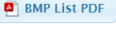
The screenshot shows the 'Project BMP Map' interface. At the top, there are several callout boxes: 'Add BMP for the project' pointing to the 'Add BMP' button, 'Returns you to BMP List for project' pointing to the 'BMP List' button, 'Create a new Road Segment for project' pointing to the 'Add Road Segment' button, and 'Project's Bid Item Report' pointing to the 'Bid Item Report' button. Below these are filter controls for 'BMP Type', 'Action Status', 'Install Status', 'Road Segment', 'Beginning Station', 'Ending Station', and 'Side'. A row of buttons includes 'Apply Filters', 'Reset Filters', 'Save Changes', 'Add BMP', 'BMP List', 'Unresolved Actions !', 'Add Road Segment', 'Bid Item Report', and 'BMP List PDF'. Project details are shown: 'Project Number: NHSX-020-9(203)--3H-28', 'Contract ID #: 28-0209-203', and 'Project Status: Construction'. A note states: 'Note: This is the BMP Map for the project referred to above. Use the filter controls to view only certain BMPs. Click the Unresolved Actions List Button to view all unresolved Actions for this project.' The map area shows a road with several yellow location pins. A callout box 'Takes you to the Edit screen for this BMP' points to a pin. A detailed callout box for a selected BMP shows: 'BMP Type: SILT FENCE', 'Use Type: Permanent', 'Road Segment: 332ND AVE', 'Beg Station: 210+10', 'End Station: [blank]', 'Side: R', 'T/A Install date: 4/16/2018', 'Install status: Pending install', 'Comments: [blank]', 'Record Created Date: 4/16/2018', 'Satisfied: no', 'Deleted: no', and 'Details: VIEW'. Another callout box 'Create a PDF of the BMP List' points to the 'BMP List PDF' button.

- Follow the steps in Section 10 above to access the BMP List.
- Adding a BMP to the Map:

1. Click .
2. Complete the form fields for adding a new BMP then click .
3. You will be taken to the BMP edit screen.
 - Select the green pin .
 - You should be on the BMP Map screen.
 - Select the location on the map
 - To save the point location, click .

12. Produce a PDF of BMP List Using Filters




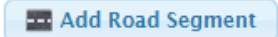
A PDF of the BMP List can be generated from the BMP List screen.

- Access the BMP List screen  or  icon.
- Click  button to generate the document
- Save or send the document as needed. IDOT Permix does not retain this file for you.

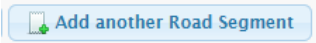

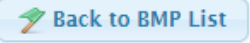

13. Create an Action Item

Action Items are typically created by the inspector. This can be done in either the iPad app or in the web version. An action item is a corrective action or work that is needed to be performed by the contractor. The options are: install, maintain, remove, or other.


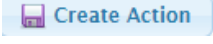

To create an Action Item:

- Access the BMP List screen  or  icon.
- Click . Fill in the required highlighted BMP information.
 - **Search All BMP Types** will provide all bid items or **Search Recommended BMP Types** will provide items that were bid with the project. Type word to start search and select your BMP type.
 - **Use Type:** Default is set on temporary. Example of temporary is silt fence. Example of permanent is native grass seeding.
 - **Beginning Station:** Type station that best represents the beginning of a BMP installation
 - **Ending Station:** Optional
 - **Side:** Left, Right, or Median
 - **Road Segment:** Start typing and road segments available for the project will appear. Select your road.
 - If there are currently no road segments that have been entered for the project or if the road you want is not listed, you can add road segments at the Project BMP List screen. Click the internet browser back arrow to go back to the Project BMP List screen. Then click .




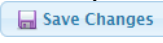
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Click  and fill in yellow field that is blank. Then click . Also at this time, it would be easiest to add all road segments for this project. Then click  to go back to BMP List and click  to get back to where you were.

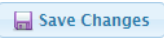
- **Comments:** Optional

- Then click 
- Then under “Action” section, select Install, Maintain, Remove, or Document/Other. You may fill in other optional information and include optional photos. Then click . A window will pop up for you to confirm that you want to add the action. If no changes, then select OK. To add more new actions for other BMPs, select  and repeat.

14. Resolve Action Items

- Access the BMP List screen  or  icon.
- Click the  button. A “!” indicates Pending Action Items exist. There are two ways to resolve an Unresolved Action.
 - The first is the quickest way. On this screen, click on any of the cells in the “Action Taken” column and select the action. The “Resolved Date” will then autofill to today’s date; however, if you would like to change the date, you may do so. Actual Quantity is an optional field. After completing all your resolved action items, click .





Action Status	BMP Type	Action Type	Road Segment	Beginning Station	Side	Due Date	Action Taken	Actual Quantity	Resolved Date
	SILT FENCE	Install	Example Road 2	1	M	11/7/2018	Installed		8/6/2019
	SILT FENCE	Maintain	Another road	123	R	7/22/2019	Unresolved		
	SILT FENCE	Remove	Example Road 1	1234	R	7/22/2019	Unresolved		
	SILT FENCE	Install	Example Road 2	1	M	7/22/2019	Unresolved		
	SILT FENCE	Maintain	Another road	123	L	7/22/2019	Unresolved		
	SILT FENCE	Maintain	Example Road 1	250+00	M	8/9/2019	Unresolved		

- The second way to resolve Unresolved Actions is to click each item individually. You do this by clicking the colored flag in the “Action Status” column. A new window will open for that specific action item. Scroll down to select the resolution (install, maintain, remove, other, replace with). All other information is optional. Then click .

15. View/Print Pending Action Items

BMPs will have pending Action Items that require some type of action/resolution (install, maintain, removal, other) in IDOT Permix. Action Items and the resolution are typically entered by inspectors (see Section 13 for creating action items). At any time during the project, a list of the Pending Action Items can be viewed, and a Punch List can be generated.




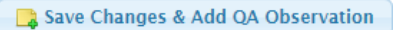
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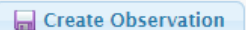
- Access the BMP List screen  or  icon.
- Click the  button. A “!” indicates Pending Action Items exist
- Click  to generate the document
- Save or send the document as needed. IDOT Permix does not retain this file.
- Click Back to BMP List, or
- Click other pages for the project by Documents, Assignments, Inspection List or BMP List located in the gold banner at the top of the page

16. Create a QA Observation

QA observations are created by the QA inspector. This can be done in either the iPad app or in the web version. A QA observation is an item the QA inspector observed during their inspection. The options are: install, maintain, remove, or other.





To create an QA Observation:

- Access the BMP List screen  or  icon.
- Click . Fill in the required highlighted BMP information. Then click 

Then select Install, Maintain, Remove, or Other. You may fill in other optional information and include optional photos. Then click 



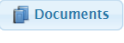



17. View and Acknowledge Unacknowledged QA Deficiencies

BMPs may have QA Deficiencies that must be acknowledged in IDOT Permix. Acknowledgement is completed by inspectors. At any time during the project, a list of the Unacknowledged QA Deficiencies can be viewed.

- Access the BMP List screen  or  icon.
- Click ,
- A “!” indicates Unacknowledged QA Deficiencies exist
- To acknowledge Unacknowledged QA Deficiencies: Click on the . A new window will open. Scroll down to “Observation Acknowledgement” and select “Accepted” or “Dismissed”. Accepted means you agree with the observation and by accepting it, the item will be automatically added to the Unresolved Actions list. Dismissed means you disagree with the item. You will then have to select a reason for the dismissal.




18. View/Upload/Acknowledge Project Documents


Documents are uploaded to the Project Documents page. Uploads may be completed by Office Users or by the Prime Contractor. However, the user must be enabled to manage documents for their profile settings assigned to the project to upload documents. See *Section 22, Additional Information on Privileges* for description of privileges. Some documents require an acknowledgement that they were received. The steps below describe how to view, upload and acknowledge documents.

- Click  button located in the top gold banner
- Click  icon associated with the project record
- The Project Information screen also provides a  button to access the Documents List
- To view an uploaded document, locate the document to view and click the PDF icon  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 
 - Click Choose File
 - Navigate to the file you want to upload to the project
 - Click Upload Now to confirm or Cancel to stop the upload from proceeding
 - Review the document name, size and upload date
- Uploaded documents cannot be deleted from a project at this time.
- To acknowledge an uploaded document, locate the document, first click the PDF icon to view the file and click the  button and the date of the acknowledgement will display.

19. View Project Inspection Reports

Completed inspections are stored on the Inspection Reports page of a project. Draft inspections may be started and will display as draft for other users accessing the inspection reports screen. Only the user that created an inspection can access the draft report for a period of time after it is started. This is rare and simply prevents users from editing the same data. To start or open a draft inspection, the user must be enabled to conduct inspections for their profile settings assigned to the project. See *Section 22, Additional Information on Privileges* for description of privileges. To view an inspection report, follow the steps below.





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

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

20. Completing an Inspection Report

All action items should be entered or updated prior to starting a weekly inspection report.

This cannot be done within the inspection report. Go to Section 14 for information on updating action items.

- Click  button located in the top gold banner
- Click  icon associated with the project record
- Click  . Complete the following information:
 - **Inspection Date and Time:** Defaults to current date/time but can be changed by user.
 - **Inspection Type:** *Select* Inspection type (Weekly or QA)
 - **Included Projects:** Default enables all projects on a contract for which user can conduct selected Inspection. User may uncheck any project except for the main project the Inspection Report is for.
- Click 
- Complete Inspection Information:
 - **Inspection Made By:** Type and select the name of the Permix user that performed inspection (this will likely be you). Other information would be completed as follows:
 - **Contractor representative:** *Enter* Permix user that participated in the inspection representing the Prime Contractor company (if any participated).
 - **Other project personnel present:** *Enter* additional Permix Users that participated in the inspection (if any participated)
 - **Others Present:** *Type* names of other **non**-Permix Users that were present
 - **Inspection Day Weather:** *Type* simple weather description
 - **Date of Most Recent Precipitation Since Last Inspection:** *Select* calendar date that precipitation occurred during the period or leave blank
 - **Amount:** *Type* to record the inches of precipitation that occurred during the period
 - **Describe Additional Precipitation That Fell Since Last Inspection:** *Type* to describe precipitation (supplemental information is helpful during particularly raining periods and actions remain unresolved for extended time)
 - **Description of Current Construction Activity:** *Type* to describe activity. This could include any erosion or sediment control work being performed, grading work being performed, or any general information on work occurring.

- **Scope of Inspection:** All are selected by default. Click to exclude each scope option
- **Unresolved Actions at Time of Inspection and Action Items Resolved Since Last Inspection:** All action items should be done/updated prior to starting a weekly inspection report. This cannot be done within the inspection report. So, these portions of the inspection report are read-only.
- **Summary Questions:** Answer summary questions. These are required.
- **Emergency Erosion Control Mobilization Notification:** Default is set on “No”. If “Yes” is selected, Contractor (Prime Contractor Inspector) will receive notification of an emergency erosion control mobilization.
- **Photos:** If desired, add up to 20 photos of the site.
- **Certification:** Sign Inspection to complete inspection and file. A small window will pop up asking you to confirm that you want to sign the report. Click “OK” and report will be filed. However, if there are any required fields that were left empty, the system will require you to fill these in before filing.

21. View Summary Reports

- Click **Summary Reports >** button located in the top gold banner
 - **Inspection Reports**
 - Modify and apply page filters
 - **Action Items**
 - Modify and apply page filters. If you are interested in items that are past due, select “Only Past Due” for Status.
 - **QA Deficiencies**
 - **NPDES Permits**
 - Modify and apply page filters to isolate records by type.
 - By default, closed NPDES Permits and ones that cover less than five (5) acres of soil do not display but can be enabled to display with filters.
 - Click NPDES Auth. # link to open the most recent version of the uploaded document
 - Click the Project Number to access the Project Information screen for the project.
 - From the Project Information screen, click the NPDES Authorization Number in the Permit Information section to return to the NPDES Permits Summary Page.
 - Click the PDF link under Permit Summary to open a summary of the NPDES Permit with more information about the projects associated including:
 - Project Status
 - Work Type
 - Location
 - Letting Date

22. Additional Information on Privileges

Under a user's settings, there are four possible roles 1) RCE/Designee, 2) DOT Central Staff, 3) DOT Field Staff, and 4) Consultant. Each of these roles have a set of default recommended Privileges (Edit Projects **P**, Edit Users **U**, Manage Documents **D**) and Inspection Types (Weekly **W** and Quality Assurance **QA**). See Figure 1.

The screenshot shows the 'Staff Person Settings' page in the IOWADOT Permix system. The page header includes 'IOWADOT Permix' and 'Office'. Navigation tabs are 'Projects', 'My Office', 'Summary Reports >', and 'LOG OUT'. The page title is 'Staff Person Settings' with buttons for 'Back to Office Staff List' and 'Save Changes'. A descriptive paragraph explains that a user is assigned to a portal by the system administrator and an office administrator assigns the user's role and organization. Below this, the user's details are listed: Name: Melissa Serio, Email: melissa.serio@iowadot.us. The 'Portal' is 'Office User'. The 'Role' dropdown menu is open, showing options: 'please select', 'RCE/Designee', 'DOT Central Staff' (highlighted), 'DOT Field Staff', and 'Consultant'. The 'Privileges' section has three checked checkboxes: 'Can edit projects', 'Can edit users', and 'Can manage documents'. The 'Inspection Types' section has two checked checkboxes: 'Quality Assurance' and 'Weekly'.

Figure 1: User Settings

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

- RCE/Designee (**Recommended Settings: P, U, D, W, QA**) such as:
 - Resident Construction Engineer
 - RCE Designees for RCE Office, such as Construction Tech Supervisor, Engineering Tech Senior, Secretary
- DOT Field Staff (**Recommended Settings: P, D, W, QA**) such as:
 - Construction Inspectors
 - District Construction Engineer Staff
 - Quality Assurance Inspectors
 - Other District Staff
- DOT Central Staff (**Recommended Settings: Depends on user's need**) such as:
 - Construction Office Staff
 - Maintenance Office Staff
 - Contracts Staff

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- Consultant (**Recommended Settings: P, D, W**) such as:
 - Consultant Inspector

RCE Offices in IDOT Permix can have one Assigned RCE and up to two Assigned RCE Designees. These three IDOT Permix users are by default affiliated with every project assigned to their RCE Office. Only Permix system administrators can change these assignments.

Permix users with DOT Central Staff and Consultant Staff user profiles cannot be assigned to an RCE Office and don't have RCE/Designee affiliations like an RCE Office does. Instead, these users are assigned to individual projects through the Project Information or My Office management screens.

Default Privileges Setup

Every user has default privileges when a user profile is created. The recommendations above may be adjusted based on the actual responsibilities the user is expected to fulfil for their office 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 at the profile level, it cannot be enabled for the user on the project level. If a default profile privilege is not desired for a user on a specific project, that privilege may be disabled on the project level. For example, if the user has weekly inspection privilege enabled with their profile settings, it may be disabled on a specific project on which the RCE does not want the user to conduct inspections. The user's privileges for other projects would remain unaffected by this project change.

Table 1 – User Profile Privilege Descriptions

Default Privileges	Purpose of Default Privilege
Edit Projects (P)	With this privilege, a user can edit project information. IDOT Permix has additional controls for which Project Information fields can be edited based on the user's type of assignment (See Table 2 for more detail).
Edit Users (U)	With this privilege, a user can update the privileges of users from the same Office (thru My Office). A user can also add and remove other users to the project (thru My Office). The Assignments page (accessed thru Project Information page) provides a user with a link to update privileges on the project level.
Manage Documents (D)	This privilege allows you to upload a document. Project documents are available to view by all users assigned to a project.
Weekly Inspections (W)	If you have this privilege, you can edit BMPs and Action Items and create Weekly Inspection reports. However, you must also be current with your training/certification to complete a Weekly Inspection report.
Quality Assurance Inspections (QA)	A QA inspector can edit BMPs and QA observations and create QA Inspection reports. However, they must also have a valid certification to complete a QA Inspection. When this setting is enabled as a default privilege on the user level,

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the inspector MAY be enabled to conduct QA Inspections for an assigned project on the project level. **It is not enabled by default on each project.**

Edit Projects Privilege

Permix recognizes a few Key Roles, like RCE or Project Inspector, that will have the ability to edit some information about their projects regardless of their user profile default settings. Other users will have the Edit Project (E) privilege enabled and can edit information about their projects. The type of information that a user can edit depends on how their office has been assigned to the project. This system of tiered edit project privileges can be a little confusing to users, but it is to ensure quality data is maintained. Table 2 shows what information a user can edit based on how they are assigned to the project.

Table 2 – Edit Privilege Functional Description by Profile and assignment

Can Edit Fields: (Blue if User Role, Orange only if Project Edit Privilege)	Affiliated RCE/ Designee	Unaffiliated RCE/ Designee	IDOT Primary Inspector	All Other Office Staff
Active Construction Complete Date and Final Stabilization Date	X	X	X	X
Stabilization required, Project number satisfying final stabilization	X	X	X	X
Project Dates: Contract Letting, Contract Award, Actual Start	X	X	X	X
Project Information: County, Work Type, Project Location	X			
Project Information: Prime Contractor Company, Prime Contractor Inspector	X		X	
Project Information: Consultant RCE Office, Consultant RCE, Consultant RCE Inspector, IDOT Project Lead Inspector	X			
Can Make Project Assignments for: (Blue if in User Role, Orange only if user has "Edit User" Privilege)				
RCE Office Users	X	X	X	X
IDOT Office Users	X	X	X	X
Prime Contractors	X		X	
Subcontractor Users	X		X	