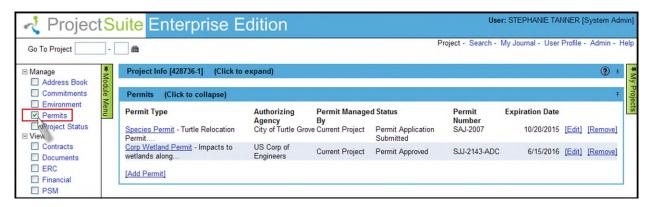
The Permits Module

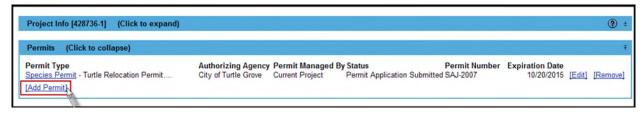
The Permits module allows users to create and track Permits that are requested by FDOT to support a Project. These are NOT Permits issued by FDOT -- these are Permits being requested by FDOT from other Agencies/Governmental Entities as a part of a Project.

Users must be granted access/privilege to the Permits module to complete the actions described in this User Manual. If you do not have access, and feel you should, contact your PSEE District Administrator. They are listed in the footer of every PSEE page.

1. Select the Permits module from the Module Menu. The Permits Module will be displayed.

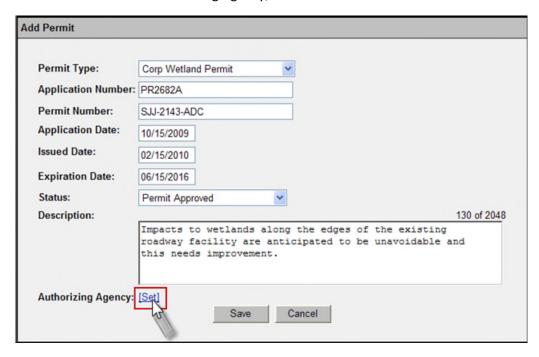


2. Select the Add Permit link to enter Permit request data.

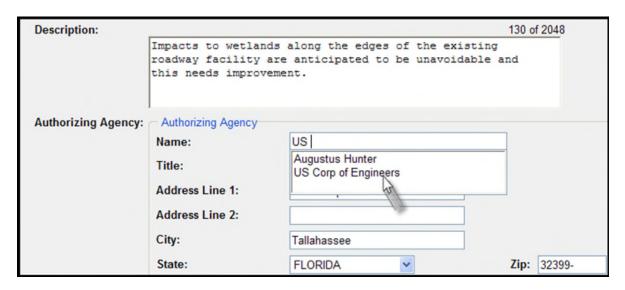


- 3. Enter the details in the displayed window regarding the Permit.
 - **Permit Type [Required]** is the type of Permit issued/documented, select the required Type from the Permit Type drop down
 - Application Number [Optional] Enter the valid Permit Application number in the text box
 - **Permit Number [Optional]** is the number assigned to a Permit by the issuer of the Permit; Enter the valid Permit number in the text box
 - Application Date [Optional] Enter or select the date the Permit Application was sent to the Authorizing Agency.
 - Issued Date [Optional] Enter or select the date the final Permit was issued.
 - Expiration Date [Optional] Enter or select the Expiration Date of the Permit.
 - Status [Required] Select a required status from the Status dropdown
 - Description [Required] Enter the description of the permit. Can be no more than 2048 characters in length. The first 25 characters of this description will be displayed in the list of Permits.

4. The **Authorizing Agency [Optional]** records the Agency or Governmental entity that issues the Permit. To set the Authorizing Agency, select the **Set** link



5. A new section appears. Enter the Authorizing Agency related to a Permit. Begin typing the name of the Agency contact in the **Name** field and a list of names will begin to display. Select the Agency from this list and PSEE will automatically populate the remaining fields. If the needed Agency does not appear in the list simply fill out the information as needed, remembering that you must provide at least one method of contacting the Agency (email address, phone number or postal address).



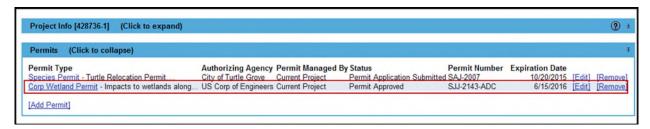
NOTE: Make sure and record the Agency Name in this field, and not individual Contacts at the Agency. This ensures that later you can search for Permits based on their Authorizing Agency. You will be able to add individual contacts in a later step.

6. If a Permit has previously been recorded for this Project, and that Permit included Internal Contacts, the user will be asked if they would like to copy those Internal Contacts to the current permit.

Deselect any contacts that should not be applied to the Permit being created.



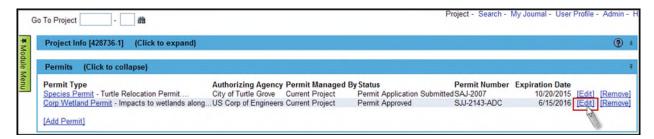
7. Once all information is documented, select Save and the Permit will be added to the Permit list.



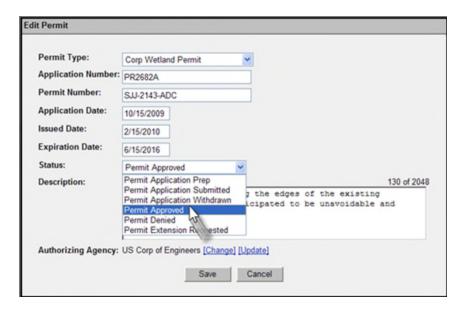
Edit Permit

The details of a Permit can be edited after being entered.

1. From the list of Permits, select the **Edit** link to the right of the Permit.



 Update the details as needed. To select a different Authorizing Agency, select the Change link displayed in the Authorizing Agency section. To make a change to the details of the Authorizing Agency that has already been chosen, select Update.

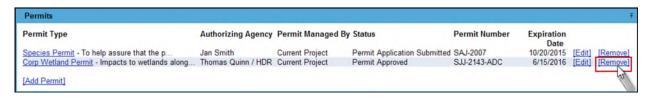


3. After all changes have been made select **Save**.

Remove Permit

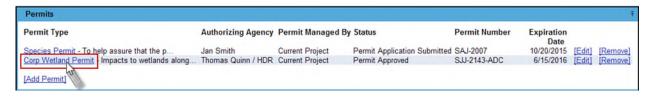
Users can remove a Permit if needed.

1. To remove a Permit, select the **Remove** link. **Note:** If a Permit Request is removed, all documents related to that request are also removed.



2. You will be prompted with a confirmation dialog box. Select **OK** to remove the Permit.

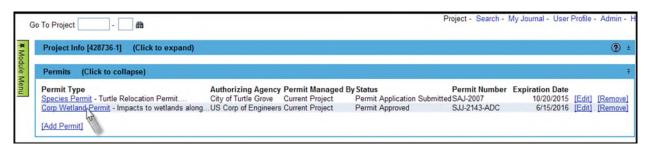
To view more important details related to the Permit, select the hyperlinked Permit Type from the Permit List.



Additional Permit Information

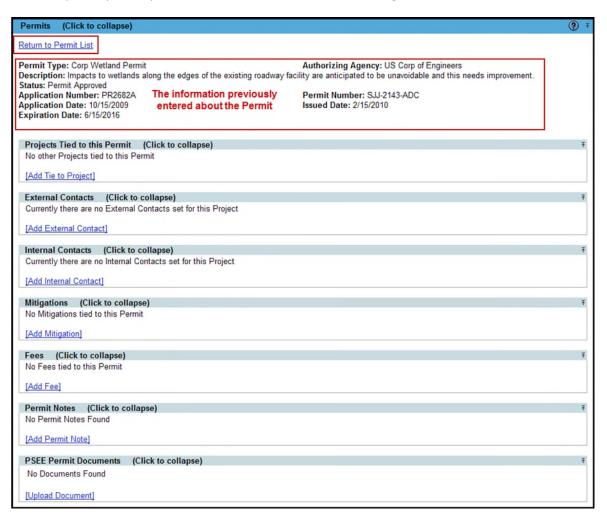
Once you have recorded your basic Permit information, you can add additional details such as Projects Tied to this Permit, External Contacts, Internal Contacts, Mitigations, Fees, Permit Notes, and PSEE Documents. To see additional Permit information:

1. Select the hyperlinked **Permit Type** from the list of Permits.



The Permit information that has previously been entered is displayed, along with several additional sections for recording more information.

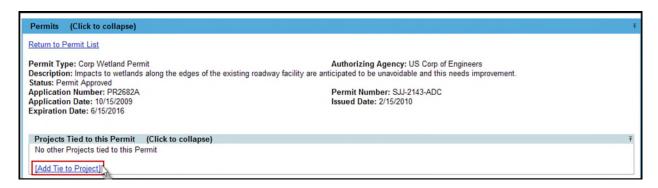
2. At any time you may select the Return to Permit List link to go back to the Permit list.



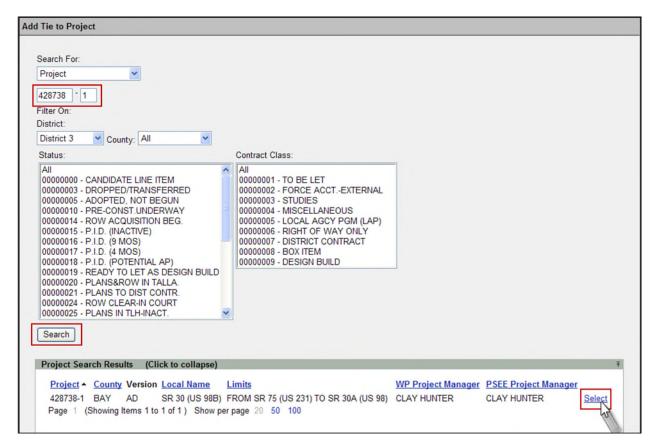
Tie A Permit To Another Project

In some instances a single Permit may apply to more than one Project. This section allows users to document that the Permit recorded in the selected Project, is also to be used by another Project.

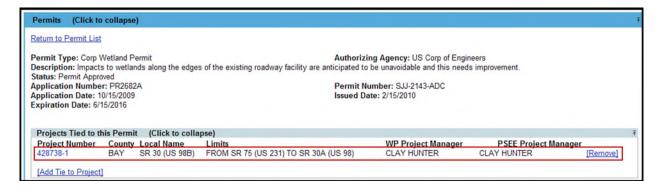
1. Select the Add Tie to Project link to select the additional Project tied to the Permit.



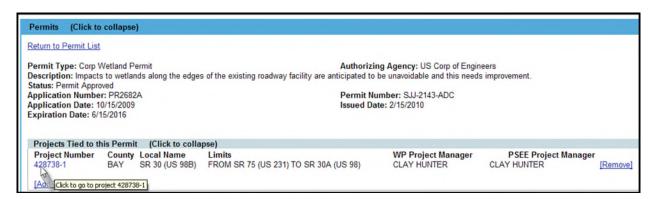
A Search window appears that allows users to find the Project. If you know the Project Number that
the Permit should be linked to, type that number into the Project Number field and select Search.
(Note you can type on a partial Project Number if needed.)



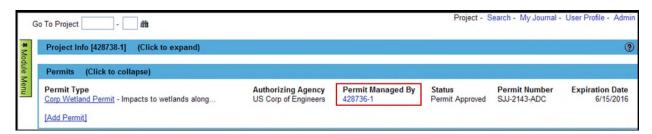
- 3. A list of matching Projects is displayed in the Project Search Results section. Choose the **Select** hyperlink for the Project that should be linked to the Permit.
- 4. The Project is now listed as being tied to the Permit.



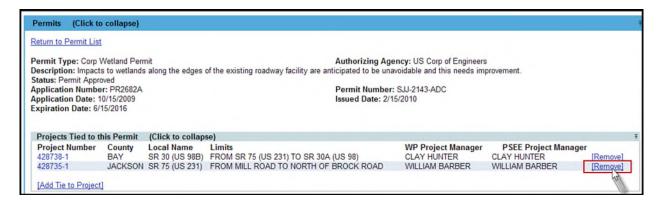
- 5. Repeat the process for any additional Projects that should be tied to the Permit. You may use any of the choices in the Search For drop down list, along with the Filters, to find the needed Project.
- 6. From the list of Projects Tied to this Permit you may select the hyperlinked Project Number to view a linked Project in PSEE.



 Looking at the Permit Module of the linked Project you will see the Permit that was created in your original Project listed. Note that it will document that the Permit listed is Managed By a different Project.



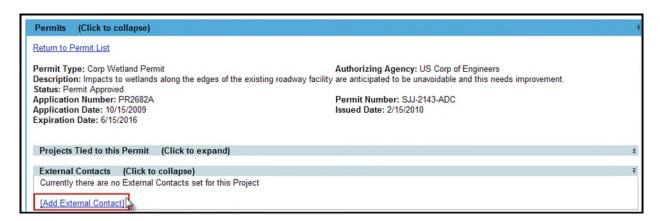
8. To remove a tie between a Permit and another Project, select the **Remove** link. You will be prompted with a confirmation dialog box. Select **OK** to confirm the removal.



External Contacts

Users can document External Contacts that are associated with a Permit.

1. Select the **Add External Contact** link from the External Contacts section.



A dialog box with appropriate fields will display to add an External Contact.

2. A new window will open. Begin typing the name of the Contact in the **Name** field. A list of matching names will begin to form just below. Select the contact from this list and PSEE will automatically populate the remaining fields.



- 3. If the needed contact does not appear in the list, continue typing the complete name and simply fill out the contact information as needed. The information must include at least one form of contact for the customer (email address, phone number or postal address).
- 4. Select **Save** when all needed information has been updated or entered.
- 5. The contact will be created and displayed in the External Contact section. Select the plus sign to the left of the contact name to display all of their contact information.



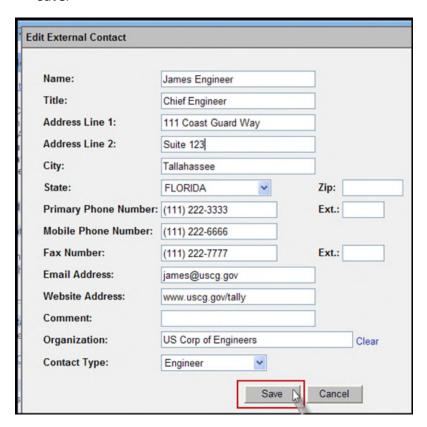
Editing or Removing External Contacts

Information about an External Contact may be edited or removed after it is added.

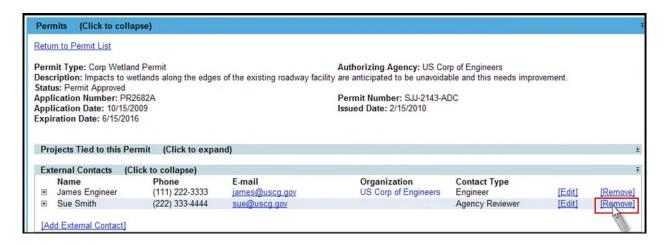
1. To Edit an External Contact, select the Edit link to the right of their contact information.



2. The details about the External Contact are displayed. Update the needed information and select **Save**.



3. To Remove an External Contact, select the **Remove** link to the right of the Contact details.



4. A confirmation dialog box will display. Select **OK** to remove the Contact.

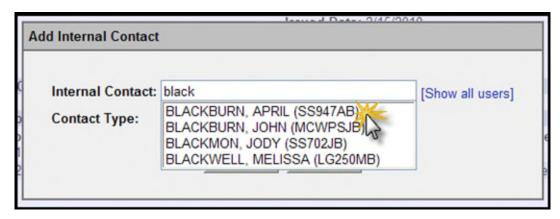
Internal Contacts

Users may also document Internal Contacts that are associated with a Permit.

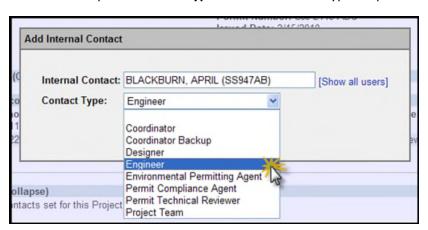
1. From the Internal Contacts section, select the Add Internal Contact link.



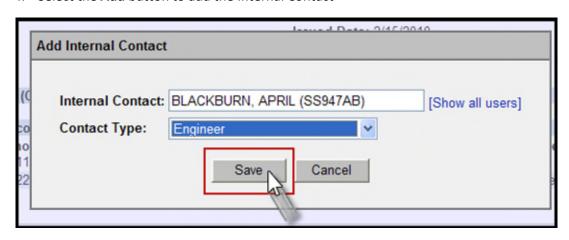
2. In the **Internal Contact** text box, enter the full or partial name of the FDOT staff member and select the required name from the displayed list



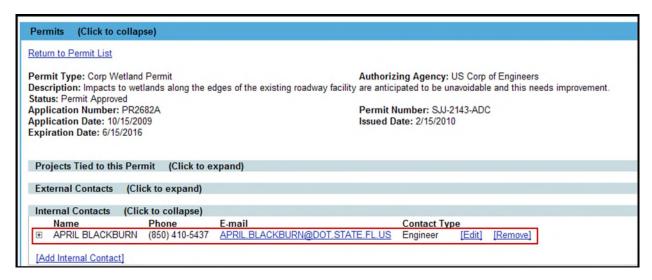
3. Select a required **Contact Type** from the Contact Type drop down



4. Select the Add button to add the Internal Contact



5. The Internal Contact is created and displayed in the Internal Contact section.



6. To see additional details about this Internal Contact select the plus sign to the left of the Contact Name.



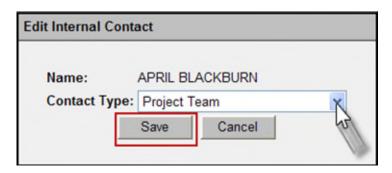
Editing or Removing Internal Contacts

Users may edit or remove information related to Internal Contacts.

1. Only the Contact Type can be edited for Internal Contacts. Select the **Edit** link to the right of the Contact information.



2. Select a different Contact type from the Contact Type drop down and select **Save** button



3. If an Internal Contact should no longer be associated with the Permit it can be removed. Select the **Remove** link to the right of the Contact of the contact details.

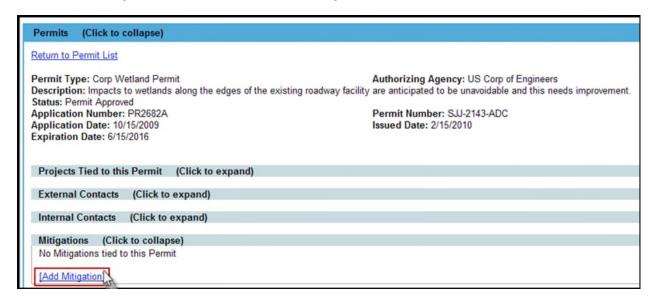


4. A confirmation dialog box will display. Select the **OK** button to remove the Internal Contact.

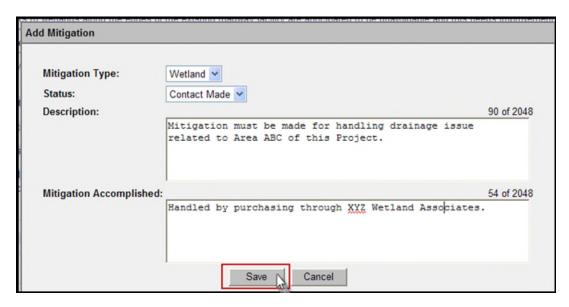
Mitigations

The Mitigation section allows users to document Mitigation work that is associated with a Permit.

1. From the Mitigations section, select the **Add Mitigation** link.



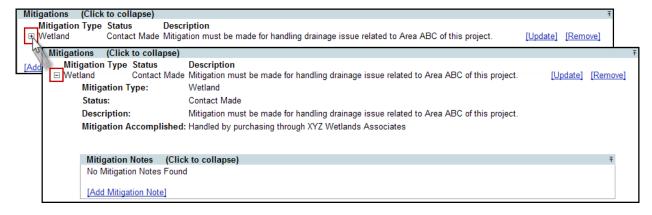
- 2. In the displayed Add Mitigation window, select/enter the following fields and select the Save button
 - Mitigation Type [Required] Select a Type of Mitigation from the Mitigation Type drop down
 - Status [Required] Select a status related to the Mitigation from the Status dropdown
 - **Description [Required]** Enter the general Mitigation description using a maximum of 2048 characters.
 - **Mitigation Accomplished [Optional]** Enter the description of Mitigation efforts accomplished using a maximum of 2048 characters.
- 3. Once all information is recorded select Save.



4. The Mitigation information is displayed in the Mitigations section.



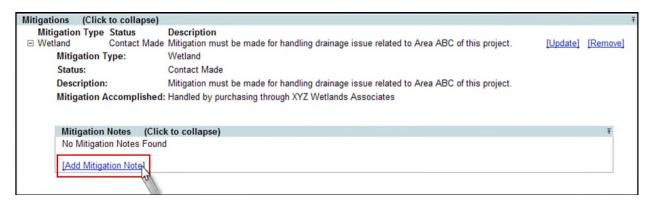
5. Select the Plus sign to the left of the Mitigation, to view the details of the Mitigation, and/or add the Mitigation notes.



Add Mitigation Notes

A Mitigation Note allows you to document the latest information related to the Mitigation effort.

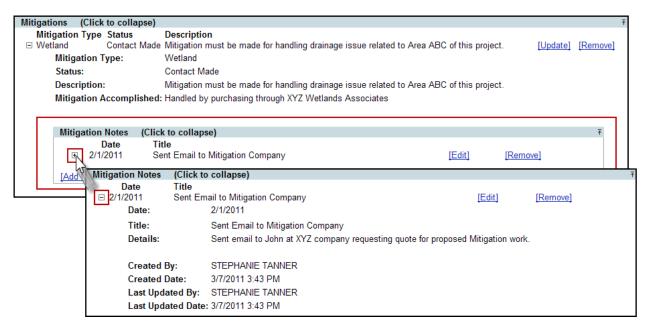
1. Select the Add Mitigation Note link.



2. Enter the details in the displayed Mitigation Note window and select **Save**.

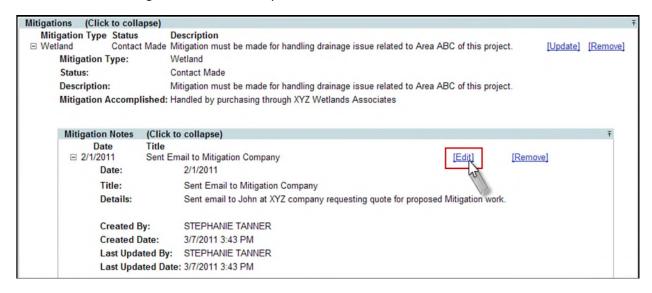


3. The new Mitigation Notes is displayed. Select the plus to the left of the Mitigation Notes to display the details.



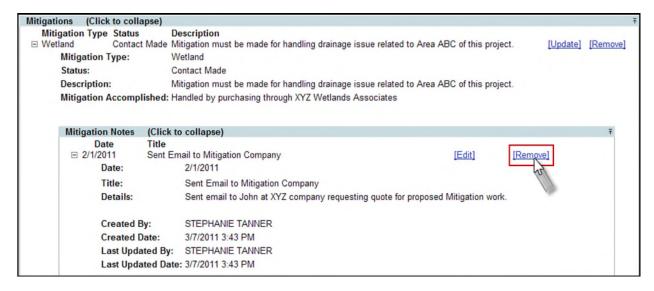
Edit Mitigation Note

1. Mitigation Notes entries may be edited by selecting the **Edit** link that appear to the right of the Notes. Make changes to the notes entry as desired and select the **Save** button.



Remove Mitigation Notes

1. If a Mitigation Notes entry is no longer needed, select the Remove link to the right of the notes entry.



Update Mitigation

1. Mitigation details can be updated by selecting the **Update** link that appears in the Mitigation list.



2. The Mitigation details are displayed, in the same display as when the Mitigation was created. Make the needed changes and select **Save** when complete.

Remove Mitigation

If Mitigation is no longer needed it may be removed.

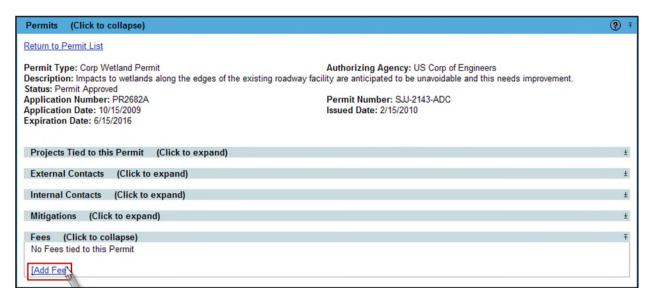
1. From the Mitigations section, select the **Remove** link to the right of the Mitigation. A confirmation dialog box will display. Select **OK** to remove the Mitigation.



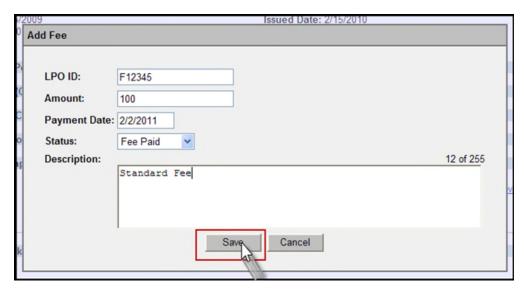
Fees

The Fee section allows users to document any Fees paid in relation to a Permit.

1. From the Permits module Fees section, select the Add Fee link



- 2. A new window appears. Enter the details of the Fee.
 - LPO ID [Optional] is a Local Purchase Order ID and is used to authorize the payment of a permit
 fee.
 - Amount [Optional] is the amount charged by the issuing party to issue the permit.
 - Payment Date [Optional] Date the permit fee was paid.
 - Status [Required] is the current Status of the permit fees.
 - Description [Required] is the information about the need or purpose of the Permit fee



3. Select the Save button to save the details.

4. The Fee information displays in the Fee section



Update or Remove Permit Fees

Permit Fee information can be updated or removed as needed.

1. To update, select the **Update** link to the right of the listed Fee.

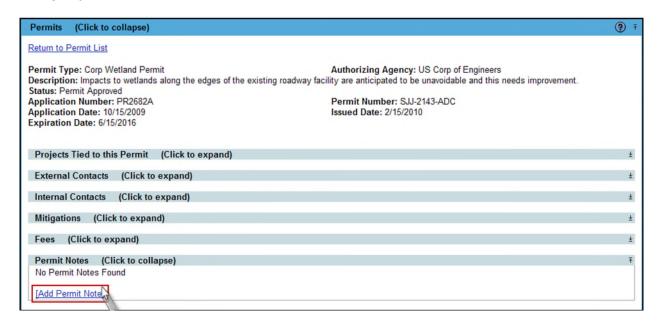


- 2. Make the needed changes to the Fee information and select Save.
- 3. To Remove Fee information, select the **Remove** link to the right of the listed Fee.
- 4. A confirmation dialog box will display. Click the **OK** button to remove the Permit Fees payment record or click Cancel to retain it.

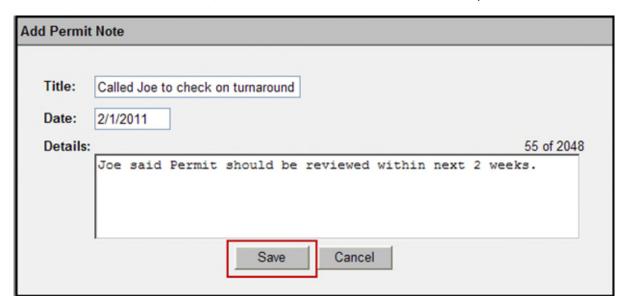
Permit Notes

The Permit Notes section allows you to document notes related to the progress of this Permit.

1. From the Permit Notes section, select the **Add Permit Note** link to record a journal related to a Permit.



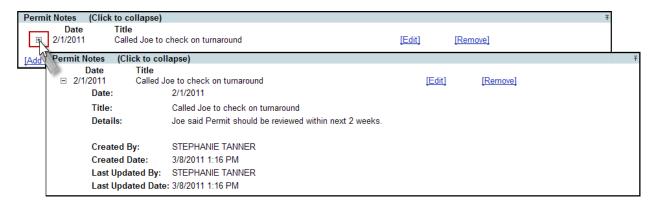
2. Enter the details, such as Title, Date, and Details. When all details are complete select Save.



3. The Permit Notes is displayed in the list.



4. Select the plus sign to expand the section and to view the details of the Permit Notes.



Edit or Remove Permit Notes

Permit Notes entries can be edited or removed after being entered.

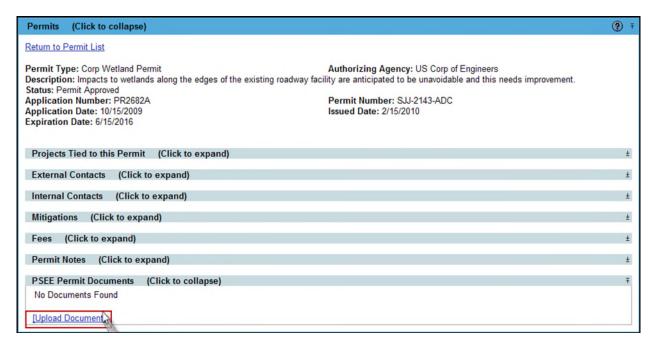


- 1. To update a Permit Notes entry, select the **Edit** link that displays to the right of the Permit Notes.
- 2. A window appears with details of the Permit Note. Change the details as needed and select Save.
- 3. To remove a Permit Notes entry, select the **Remove** link.
- 4. A confirmation dialog box will display. Select **OK** to remove confirm removal of the Permit Notes.

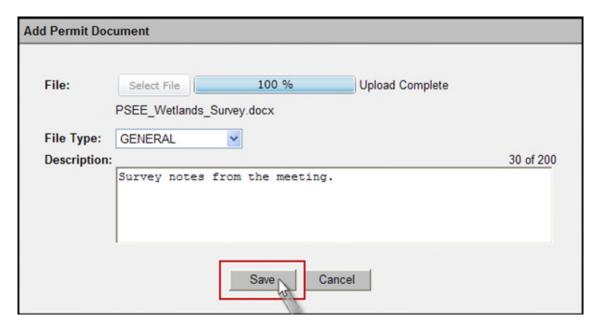
PSEE Permit Documents

Documents can be uploaded that support a Permit.

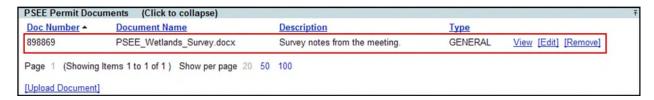
1. From the PSEE Permit Documents section, select the **Upload Document** link to attach a document related to a Permit.



2. A new window appears. Select the document you wish to upload by selecting the **Select File** button. Select the File Type **(required)** from the File Type drop down, add a description **(required)** for the document, and then select the **Save** button.

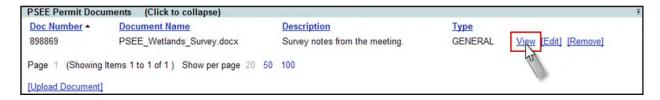


3. The document is now added and listed in the PSEE Permit Documents section.

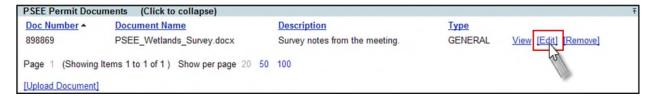


Attached documents can be managed within the Document's details. From there you can View, Edit or Remove the document.

4. Select the **View** link to retrieve the document for display. The document will be opened in its native application.



5. Select the **Edit** link to change the description of the document.



6. Select the **Remove** link to remove the document from the PSEE Permit Documents section. You will be prompted with a confirmation dialog box. Select **OK** to remove the document or **Cancel** to retain it.

