



# iWorQ

## Permit Management

Quick Start Guide

# Welcome to Permit Management

iWorQ is designed so you can customize the software to meet your permit management needs. This guide was created to help you start performing common tasks in the Permit Management system through step-by-step explanations and screen shots.

For additional help or questions, please call technical support at **888.655.1259**.

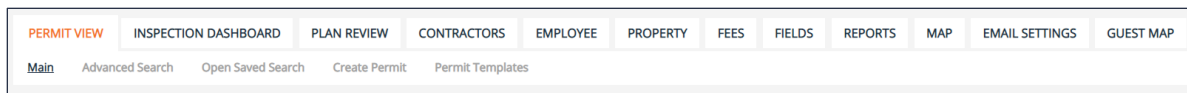
**Technical support and training are always free!**

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# Creating and Managing Permits



## Creating a New Permit

1. Click **Create Permit** in the sub-menu.

A screenshot of a web application form titled 'CREATE PERMIT'. The form is set against a light gray background. At the top right of the form area, there is a 'CREATE' button with a document icon. The form contains the following fields and controls:

- Permit Date: Text input field containing '08/30/18'
- Permit Type: Drop-down menu with 'Remodel' selected
- Expiration Date: Text input field containing '02/26/2019'
- Source: Drop-down menu with '--' selected
- Description: Text input field
- Sup Type: Drop-down menu with 'Residential Basement Fi' selected
- Residential/Commercial: Drop-down menu with '--' selected
- Applicant Name: Text input field
- City, State, Zip: Text input field
- Applicant Address: Text input field
- Phone Number: Text input field
- Phone Type: Drop-down menu with '--' selected
- Issued Date: Text input field
- Valuation: Text input field containing '0'
- Square Feet: Text input field

2. Fill out the permit information. This can be changed later if necessary.
3. Click the **Create** button.

To add additional fields or items to drop-down menus, see page 11.

# Modifying an Existing Permit

## Modifying Permit Data

1. To edit an existing permit, click on the permit's row within the Permit View table.
2. The Permit Information window will display all the information attached to the permit. Edit the necessary information.

The screenshot displays the 'PERMIT' information window. At the top, there are 'HISTORY' and 'SAVE' buttons. The window is divided into several sections:

- PROPERTY:** Ty Pebley, 9999999999, tycontractor@email.com
- Address:** 149 Coventry Place LOGAN, Utah 84341
- Parcel:** 2086703219
- Block:** Lot: 2 | Zoned: Residential
- Sub:** NA
- Legal:** 11001 West by North West
- STATUS:** Open (dropdown menu)
- HISTORY:** Brady Hunsaker, 08/10/2018
- Actions:** View | Remove

The main editing area contains the following fields:

- Permit #: 6
- Permit Date: 06/11/18
- Permit Type: Building (dropdown)
- Expiration Date: 12/08/2018
- Description: (empty text box)
- Sup Type: Residential Single Family (dropdown)
- Residential/Commercial: Residential (dropdown)
- Applicant Name: Ty Pebley
- Applicant Address: 149 Coventry Place
- City, State, Zip: LOGAN
- Phone Number: 2086703219
- Phone Type: -- (dropdown)
- Source: -- (dropdown)

A sidebar on the right contains various actions:

- Copy Permit
- Save As Template
- Email Permit
- Print Permit
- Add Letter
- Notes
- Contractors
- Property
- Add Inspection
- Add Plan Review
- Add Valuation
- Add Fees
- Add Payment
- Add CC Payment
- Upload File
- Map

3. Click the **Save** button to preserve any changes made to the permit.

# The Permit Information Window

The screenshot shows the 'PERMIT' information window. At the top, there are icons for settings, history, and save. Below this is a 'STATUS | HISTORY' section with a dropdown menu currently set to 'Nothing set'. The main form contains fields for Permit # (1092), Permit Date (10/20/20), Project Name, Project Type, Description, Residential/Commercial status, Permit Type, Applicant Name, Project Cost, and Construction Type. A right-hand sidebar contains a list of actions: Copy Permit, Save As Template, Email Permit, Print Permit, Apply Template, Add Letter, Notes, Contractors, Property, Add Inspection, Add Plan Review, Add Valuation, Add Fees, Add Payment, Add CC Payment, Add CC Swipe Payment, Upload File, Map, and Open Guest Map. Callout boxes provide instructions for each of these actions and other features like the quickfind menu and saving changes.

Open the quickfind menu for the permit

Save changes to the permit

Create a copy of the permit, assigns it a new number, and immediately displays the new permit

Create a template out of the entered information. Templates can be accessed from the dashboard, or by clicking the Apply Template button below

Email the permit to employees or contractors

Print any recorded data on the permit

Add a permit letter

Add detailed notes to the permit

Add contractors to the permit

Add properties to the permit

Schedule inspections for the permit

Add a plan review to the permit

Add a valuation to the permit

Upload files to the permit

Open the map

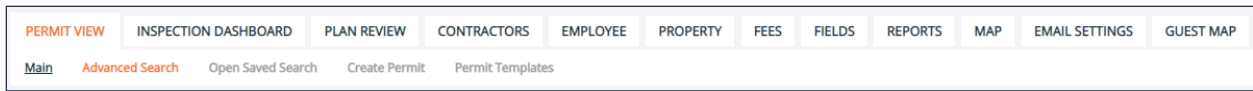
Add credit card payments to the permit

Add payments for the permit

Add fees to the permit

**Pop-up blockers must be disabled for iWorQ in order for many of these features to function.**

# Advanced Search



## Using the Advanced Search

1. Click the **Advanced Search** button in the sub-menu.
2. The Advanced Search allows the user to search by any fields in the application. Enter the desired search parameters and click **Search**.

3. Searches can be saved for later ease of access. To save a search, click the **Save Search** button before clicking Search.

## Saved Searches

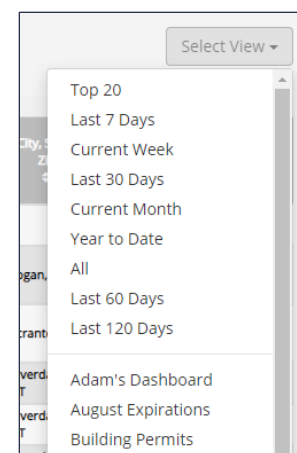
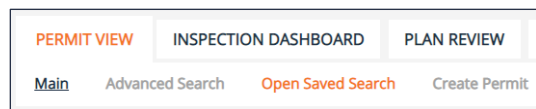
There are two methods to open a saved search.

1. Click the **Open Saved Search** button in the sub-menu.
2. Select the saved search from the drop-down menu and click **Open**.
3. The user can also edit the search parameters of the saved search by clicking **Edit**.

Or

1. Select the saved search from the **Select View** drop-down menu in the upper right-hand corner of the Permit View table.

Saved Searches can also be used when creating reports.



**If you have questions about saved searches, contact iWorQ for assistance: 888.655.1259.**

# Adding Data

## Inspection Dashboard

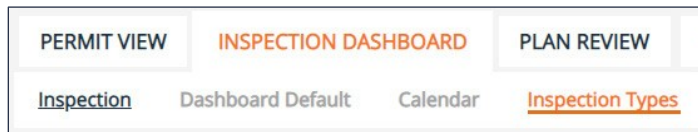


The Inspection Dashboard is for managing inspection types and statuses used when scheduling an inspection.

**Inspectors are considered employees and are added to the database through the employees tab. See page 8 for managing employees.**

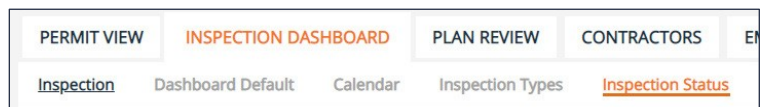
### Adding an Inspection Type

1. Click on **Inspection Types** in the sub-menu.
2. Within the side menu on the right-hand side of the screen, click **Add Type**.
3. Enter in the inspection type title and a brief description.
4. Click **Add**.



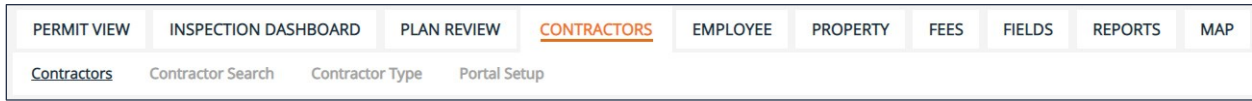
### Adding an Inspection Status

1. Click on **Inspection Status** in the sub-menu.
2. Enter in a new status into the textbox and click **Add New**.
3. To delete existing statuses, click the red X at the end of the status's row in the table.



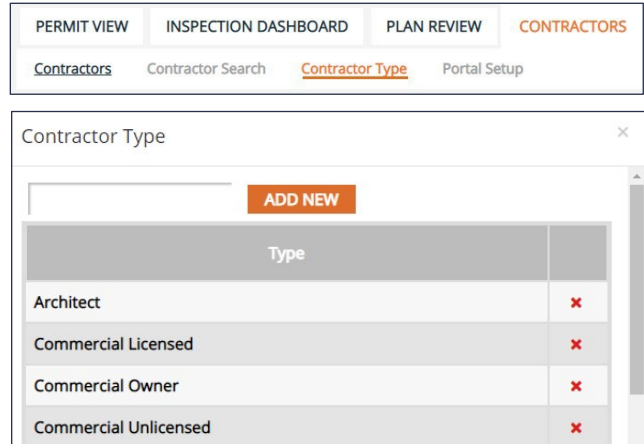
Status	
	X
001: Open	X
002: Complete	X
004: Rejected - Needs Reinspect	X
005: Pending	X

# Contractors



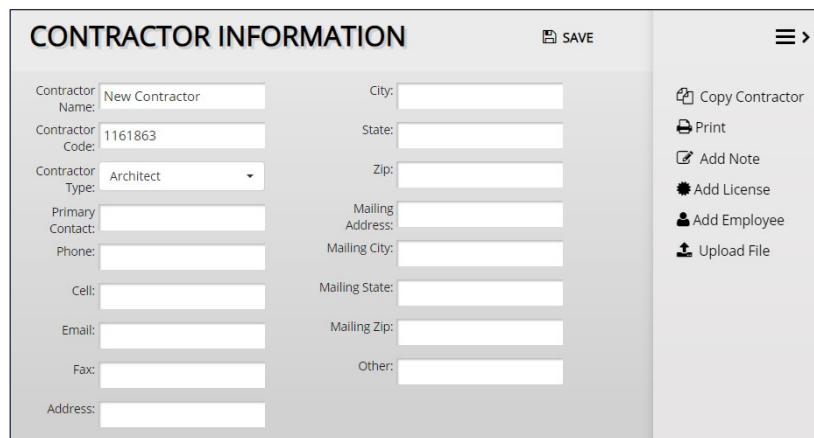
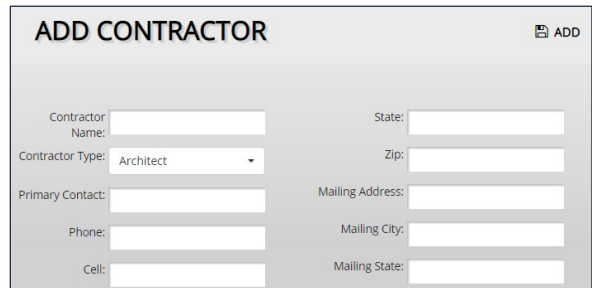
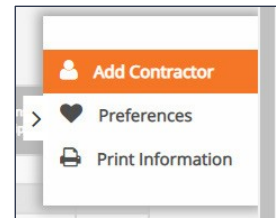
## Adding a Contractor Type

1. Click on **Contractor Type** in the sub-menu.
2. Enter in the name of the new contractor type and click **Add New**.
3. To delete existing contractors, click the red X at the end of the contractor type's row in the table.



## Adding a Contractor

1. Click **Add Contractor** within the side menu on the right-hand side of the screen.
2. Fill out the information for the new contractor and click **Add**.
3. Click on the row of the new contractor within the table to add licenses and employees to the new contractor.



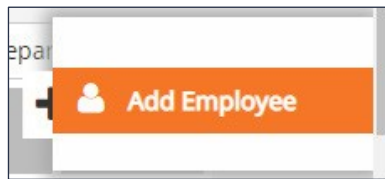


# Employees



## Adding an Employee

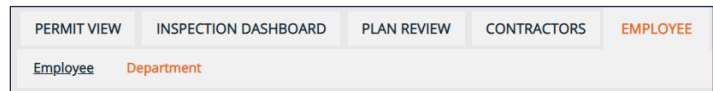
1. Click the **Add Employee** button within the side menu on the right-hand side of the screen.



Employee Name	Sam
Email	sam@fakeemail.com
Department	005 GEN ENG - AIRPORT
Title	Supervisor
Phone	
Active:	Active

2. Fill in the employee information and click **Add Employee**.

## Adding a Department



1. Click the **Department** button in the sub-menu.
2. Click **Add Department**.
3. Enter the new department name and choose whether to add the new department only to the Permit Management application or to all applications.
4. Click **Add**.
5. To edit an existing department, click on the row of the department in the table.
6. To delete an existing department, click on the red X at the end of the department's row in the table.

Departments			
+ Add Department			
		3rd Party	
		Assessor's Office	
		Building Inspection	
		City Hall	

Department Name	<input type="text"/>
Type	This application only

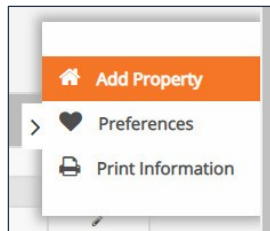
# Property

PERMIT VIEW   INSPECTION DASHBOARD   PLAN REVIEW   CONTRACTORS   EMPLOYEE   **PROPERTY**   FEES   FIELDS   REPORTS   MAP

Property   Property Search   Zoning   Restrictions

## Adding Property

1. Click on the **Add Property** button within the side



menu.

2. Fill in the property details.
3. Click **Add**.

### ADD PROPERTY

Parcel:       Zoning:

Address:       Owner:

City:       Owner Address:

State:       Owner City:

Zip:       Owner State:

Legal:       Owner Zip:

Subdivision:       Owner Phone:

Lot:       Owner Email:

Block:

## Adding Zoning

PERMIT VIEW   INSPECTION DASHBOARD   PLAN REVIEW   CONTRACTORS   EMPLOYEE   **PROPERTY**

Property   Property Search   Zoning   Restrictions

1. Click the **Zoning** button in the sub-menu.
2. Enter the zoning title into the textbox and click **Add New**.
3. To delete an existing zoning label, click on the red X at the end of the zoning label's row in the table.

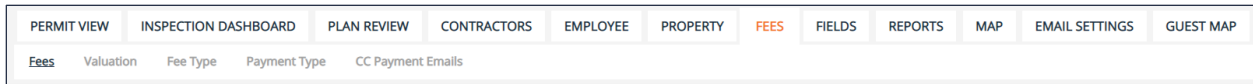
### Zoning

**ADD NEW**

Zoning	
-	X
A1 - Single Family Residence *	X
A2 - Mobile Home on Real Estate *	X
A4 - Other Storage/ Garage/etc	X

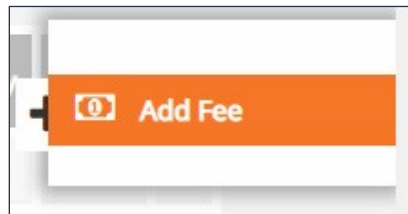
**We can upload your property information into your application. Call Technical Support at 888.655.1259.**

# Fees



## Adding a Fee

1. Click the **Add Fee** button within the side menu on the right side of the screen.
2. Enter the fee name and information.
3. Click **Add**.

A screenshot of the 'Add Fee' form. The form has a title bar 'Add Fee' with a close button. The fields are: Fee Name (text input with 'Fee'), Type (dropdown menu with 'Admin Fee'), Active (dropdown menu with 'Active'), Account Number (text input), Description (text area), Calculation (text area), and Summary Fee (dropdown menu with 'No'). There is an orange 'ADD' button at the bottom right.

If you are interested in having iWorQ upload your fee schedule call 888.655.1259.

## Fee Formulas

Fees can use data as part of the calculation. For the data to function properly in the formula:

- Permit data must be enclosed in brackets.
- Permit data must be named exactly as it appears on the permit.
- Formulas are case sensitive.

For example, to create a fee of \$2 for every square foot of a property where the permit field for square feet is named "Sq Feet". The formula would be:

**2\*[Sq Feet]**

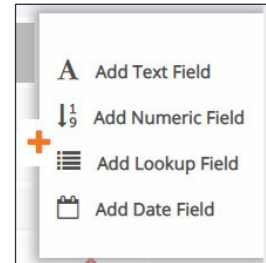
If you need assistance, please call Technical Support at 888.655.1259.

# Customizing Data Fields



## Adding Fields

In the Fields tab, the side menu on the right-hand side of the screen contains four options to add a new field: Text, Numeric, Lookup, and Date.



### Text Fields

The Text Field accepts text, symbols, and numbers.

1. Click **Add Text Field**.
2. Enter in the Field Name and a default value to display upon creation of a new permit.

### Numeric Fields

The Numeric Field accepts numbers and decimals.

1. Click **Add Numeric Field**.
2. Enter in the Field Name, the number of decimal places to be displayed, and a default value to display upon creation of a new permit.

### Date Fields

The Date Field accepts numbers formatted as dates.

1. Click **Add Date Field**.
2. Enter in the Field Name and enter a default number of days away from creation date of the permit to display.

## Lookup Fields

The Lookup Field creates a drop-down menu box.

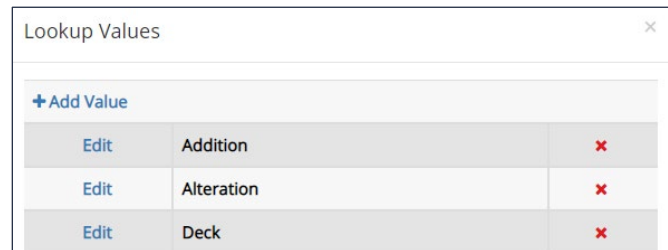
1. Click **Add Lookup Field**.
2. Enter in the Field Name and click Add Field.
3. To add options in the drop-down menu, click on the blue **Values** button in the new field's row in the table.



A dialog box titled "Add Lookup Field" with a close button (X) in the top right corner. It contains a label "Field Name:" followed by an empty text input field. Below the input field is an orange button labeled "ADD FIELD".

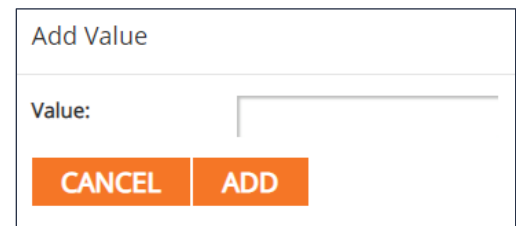
Edit/View	Field ID	Field Name	Lookup Values	Type	Order	
	251977	Project Name		text	1	
	251985	Project Type	Values	lookup	2	
	130831	Description		text	3	

4. Click **Add Value**.
5. Enter in a value and click **Add**.
6. To edit an existing value, click the blue **Edit** button in the value's row. To delete an existing value, click the red X at the end of a value's row.



A dialog box titled "Lookup Values" with a close button (X) in the top right corner. It contains a "+ Add Value" button. Below it is a table with three rows. Each row has a blue "Edit" button, a text value, and a red "X" button.

Edit	Value	
Edit	Addition	
Edit	Alteration	
Edit	Deck	



A dialog box titled "Add Value" with a close button (X) in the top right corner. It contains a label "Value:" followed by an empty text input field. Below the input field are two orange buttons: "CANCEL" and "ADD".

## Deleting Fields

To delete a field, click the red X at the end of a field's row and click **Yes** to delete the field.

## Reordering Fields

To reorder fields, click and drag fields within the table into the desired order. Changes to the order of fields are automatically saved.

# Adding a Permit Letter

## Adding a Letter to a Permit

1. In the permit view tab, open the Permit Information window for the permit. Click **Add Letter** in the column on the right-hand side of the window.

**PERMIT** HISTORY SAVE

STATUS | HISTORY

Nothing selected

Daniel Hansen  
10/29/2020

Permit #: 1131 Fire Sprinkler?: ..

Permit Date: 10/29/20 Floodplain?: ..

Project Name: Applicant Address:

Project Type: .. City, State, Zip:

Description: Phone Number:

Residential/Commercial: .. Email:

Permit Type: .. Source: ..

Applicant Name: Issued Date:

Project Cost: Valuation: 0.0000

Construction Type: .. Expiration Date: 10/29/2021

Square Footage: 0 Assigned To: ..

Use: ..

Copy Permit  
Save As Template  
Email Permit  
Print Permit  
Apply Template  
**Add Letter**  
Notes  
Contractors  
Property  
Add Inspection  
Add Plan Review  
Add Valuation  
Add Fees  
Add Payment  
Add CC Payment  
Add CC Swipe Payment  
Upload File  
Map  
Open Guest Map

2. Choose a letter from the drop-down menu. Click **Add**.
3. The letter will display in a new window. Scroll to the bottom of the letter and choose to save, email, or print the letter.

Add Letter

Create Letter: T1 Building Permit

ADD

**Please contact iWorQ at 888.655.1259 for any questions or to add new letters to your applications.**

**Example City**  
111 E. Example St  
Example City, UT 84403

**Building Permit**

General Location  
Permit No: 1131 Site Address:  
Permit Date: 10/29/2020 City, State/Zip:  
Expire Date: (Expire Date) Parcel No:  
Use Type: Log:  
Project Cost: Subdivision:

Owner/Contractor  
Address:  
City/State/Zip: Contractor:  
Address:  
City/State/Zip: Phone:  
Email: Type:

INSPECTION INFORMATION [Pass/Fail]

COMMENT'S AND CORRECTIVE ACTIONS

Fee Amount Payment Date Amount  
Total Fee: \$0.00 Total Paid: \$0.00

It is hereby certified that the above use as shown on the plans and plans submitted with the application conforms with all applicable provisions of the City of Example Zoning Ordinance. The issuance of this Permit does not allow the violation of City of Example Zoning Ordinances or other governing Regulations.

Zoning Office Date

SAVE PRINT EMAIL

# Creating Reports

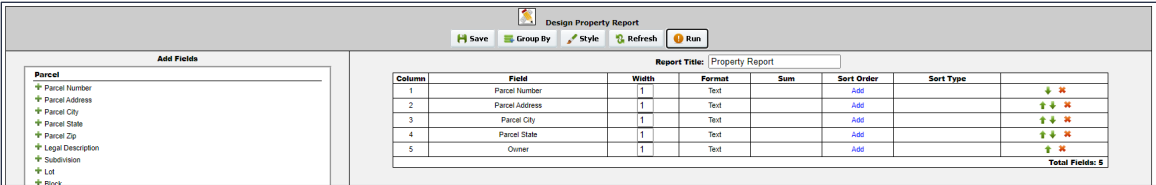


## Building a Report

1. In the Reports tab, choose from the list of options which report to run. Click the blue **Build** button at the end of the row of the report.

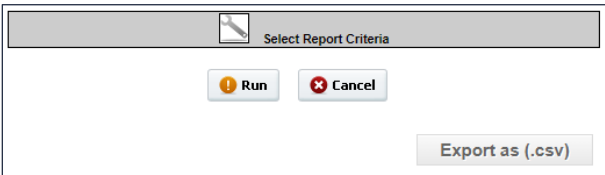
Permit Reports		
Report Name	Report Description	
Property Report	List of Properties	Build
Permit Summary Lookup Fields	Summarizes permits by Lookup Field 1 and Lookup Field 2	Build
Permit Summary Month	Summarizes permits by Lookup Field and Month	Build
Permit Report	General Permit Report	Build
Permit Detail Report	General Permit Report with additional information on inspections, contractors, notes, letters, and files.	Build
Contractor Report	List of Contractors	Build
Permit Summary 1	Summarizes permits issued by: Current Month, Month Last Year, Current Year to Date, and Last Year To Date	Build
Permit Summary 2	Summarizes permits issued by Date Range	Build
Fee & Payment Reports		
Report Name	Report Description	
Fee Summary Paid Totals	Summarizes number of fees and total fee amounts paid	Build
Fee Summary By Month	Summarizes permits by Fee Type and Month	Build

2. Select which data fields to display in the report. Reorder the fields into the desired order by clicking the up and down arrows for each field. Sorting and grouping rules are also available. Once finished, click the **Run** button.



3. Select the data range for the report. Use a saved search to further narrow results, if desired. Once the necessary criteria has been selected, click **Run** to view or print the report, **Cancel** to return and further build the report, or **Export as (.csv)** to download the data in a spreadsheet.

Please contact iWorQ at 888.655.1259 for any questions on running reports.



# The Report Interface

The screenshot shows the 'Design Permit Report' interface. At the top, there is a toolbar with buttons for Save, Group By, Calculate, Style, Refresh, and Run. Below the toolbar, the interface is divided into two main sections: 'Add Fields' on the left and a report table on the right. The 'Add Fields' section contains a tree view of 'Permit Information' fields. The report table has columns for Column, Field, Width, Format, Sum, Sort Order, and Sort Type. Callout boxes point to various elements: 'Save the report to be accessed from the Report tab' points to the Save button; 'Add a calculation to the report' points to the Calculate button; 'Customize the color, font, and font size' points to the Style button; 'Refreshes the page and removes any unsaved changes' points to the Refresh button; 'Run the report' points to the Run button; 'Edit the name of the report' points to the Report Title field; 'Add fields to the report' points to the field list; 'Change the width of the column for a field' points to the Width column; 'Include a sort order on the entries within each field' points to the Sort Order column; and 'Edit the order of the fields using the up and down arrows' points to the Sort Type column.

Save the report to be accessed from the Report tab

Add a calculation to the report

Customize the color, font, and font size

Refreshes the page and removes any unsaved changes

Run the report

Edit the name of the report

Add fields to the report

Change the width of the column for a field

Include a sort order on the entries within each field

Edit the order of the fields using the up and down arrows

Column	Field	Width	Format	Sum	Sort Order	Sort Type
1	Permit #	1	Numeric	<input type="checkbox"/>	Add	↑ ↓ ✕
2	Permit Date	1	Date		Add	↑ ↓ ✕
3	Main Status	1	Text		Add	↑ ↓ ✕
4	Description	1	Text		Add	↑ ↓ ✕
5	Permit Type	1	Text		Add	↑ ↓ ✕
6	Applicant Name	1	Text		Add	↑ ↓ ✕
7	Project Cost	1	Text		Add	↑ ↓ ✕
8	Issued Date	1	Date		Add	↑ ↓ ✕
Total Fields: 8						



# Using the Map

## The Map Interface

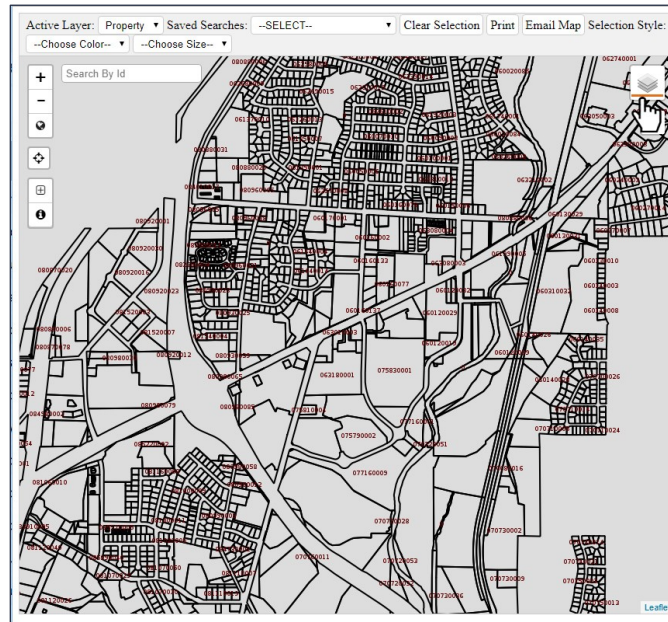
The image shows a screenshot of a web-based map interface with several callout boxes pointing to specific features:

- Find current location:** Points to the location pin icon in the top-left toolbar.
- Select a saved search to display on the map:** Points to the "Saved Searches" dropdown menu at the top.
- Select a color to display search results:** Points to the "--Choose Color--" dropdown menu at the top.
- Select the background layer to display:** Points to the layer selection icon in the top-right corner.
- Reset the zoom:** Points to the circular arrow icon in the top-left toolbar.
- Select one or more parcels:** Points to the selection tool icons (rectangle and lasso) in the top-left toolbar.
- Identify a property:** Points to the information icon in the top-left toolbar.

The map itself displays a residential area with numerous parcel boundaries and identification numbers. A search bar at the top left contains the text "Search By Id". The interface includes standard map controls like zoom in (+) and zoom out (-) buttons, a search icon, and a print icon. The bottom right corner of the map area shows the text "Leaflet | Map data © openstreetmap contributors".

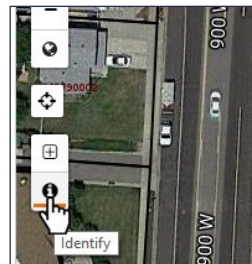
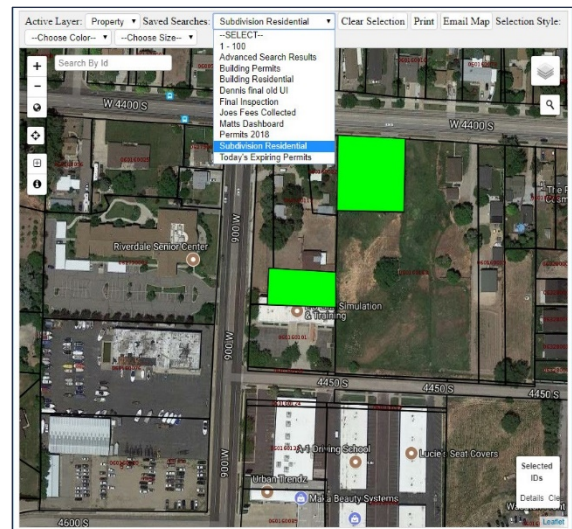
# Changing the Background View

1. To adjust which layer is displayed by the parcel and permit information map, click on the layers button in the top right-hand corner of the window.
2. Select which option to display as the background map layer.



# Viewing Saved Searches

1. To display saved search data, select the saved search from the Saved Searches dropdown menu at the top of the window.
2. Results from the saved search will be highlighted on the map.
3. To view the information of a property, click the identify button and click on a highlighted shape.



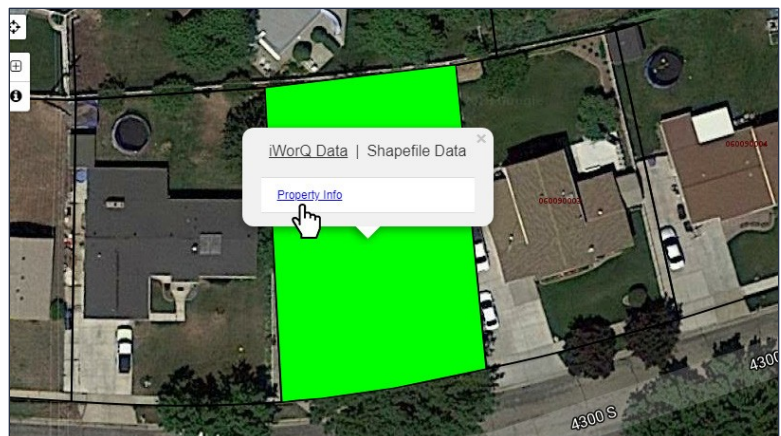
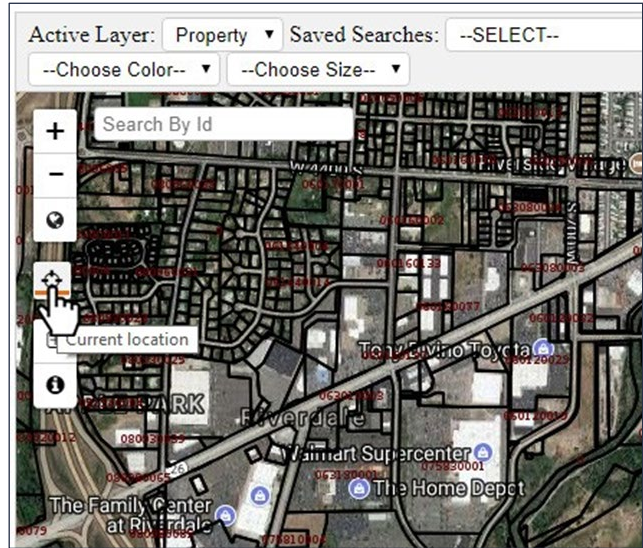
# Creating a Permit in the Field

1. To issue a new permit while on site, use the current location option to find your location on the map.
2. Click on the Select option and place your cursor in the top corner of a property and drag a box within the parcel boundaries to select a



location.

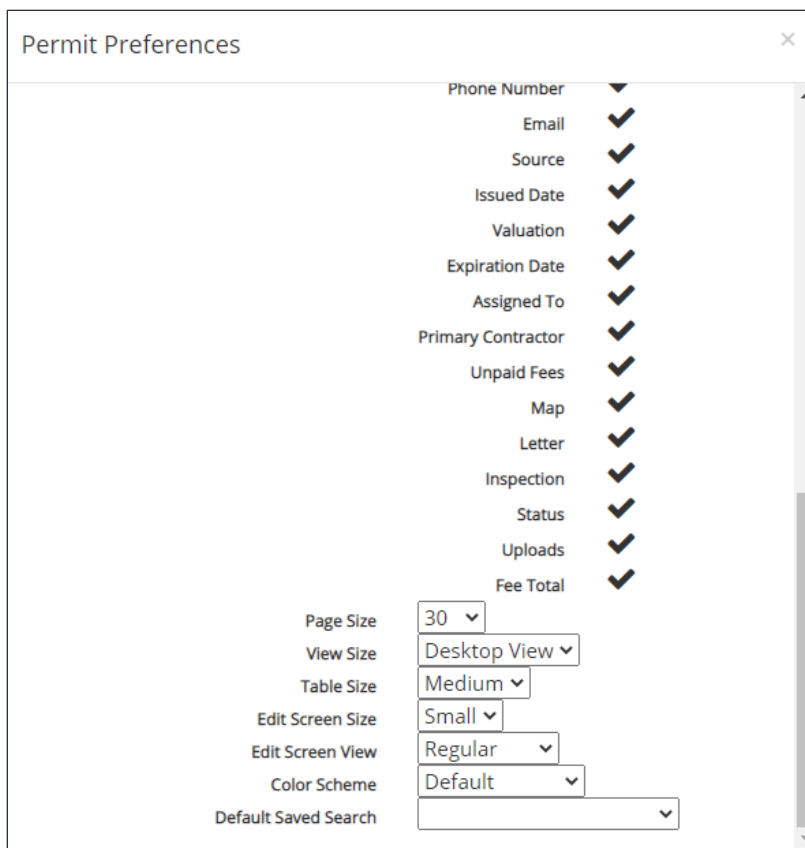
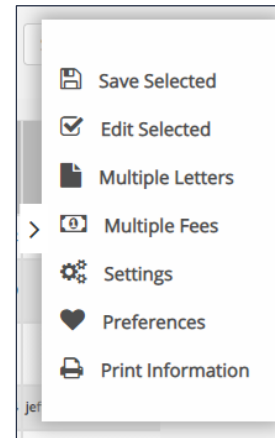
3. Click on the property info link to open the property information.
4. In the new window, create a permit by clicking the Permit Management button on the right-hand side of the window.



# Dashboard Preferences

## Setting Preferences

1. To customize the display of the Permit Management application, select the **Preferences** button within the side menu.
2. In the Permit Preferences window, select which fields to display in the Permit View table (this does not remove a field from the application and fields can still be viewed in the Permit Information window if unchecked in the Preferences window). Select the number of lines displayed on each page as well as the size the information is displayed at.



# Dashboard Overview

Search for permits by specific parameters

Create a new permit either from scratch or from a saved permit

View results from a saved search or permits from a specific time frame

PERMIT VIEW INSPECTION DASHBOARD PLAN REVIEW CONTRACTORS EMPLOYEE PROPERTY FEES FIELDS REPORTS MAP EMAIL SETTINGS

Main Advanced Search Open Saved Search Create Permit Permit Templates

PERMIT BETWEEN 1/1/2020 AND 09/08/2020 Select View

Selected	Permit Number	Permit Date	Parcel	Property Address	Owner	Subdivision	Good Landlord	Project Name	Project Type	Tenant	Floodplains	Description	Permit Type	Email	Applicant Name	Residential/Commercial	Project Cost	Construction Type	Square Footage	Use	Fire Sprinkler?	Floodplains?	Applicant Address	City, State, Zip	Phone Number	Email
<input type="checkbox"/>	1022	09/03/2020	365125899	1250 Paramount Street	Ethan Hunt	Jonestown		Roof				I need to replace my shingles and some of my boards	Building	Ethan Hunt	Residential	8500	IA	4400	Residential - Single Family	No	No	No	1250 Paramount Street	Ithaca, NY	232-123-1233	ehunt@gmail.com
<input checked="" type="checkbox"/>	1020	09/01/2020	051730008	808 W 3875	Larry Hagnan	Winston Woods		Remodel			District 7, Zone 4 with High Level Intensity	Remodelling building	building	Larry Hagnan	Residential	18000	IB	3850	Residential - Single Family	No	No	No	808 W 3875 South	Canton, MS	421-123-1233	lhagnan@gmail.com
<input type="checkbox"/>	1014	08/20/2020	365125899	1250 Paramount Street	Ethan Hunt	Jonestown		Fence				Would like to add a 10 foot fence	Building	Ethan Hunt	Residential	1250	IB	3250	Multi Family	No	No	No	1250 Paramount Street	Del Rio, Texas	233-123-1233	ehunt@wv.gov
<input checked="" type="checkbox"/>	1012	08/18/2020	000-111-1234	123 WorQ St.	Haider Atkinson	WorQ		Remodel				Remodelling the kitchen	Building	Haider Atkinson	Residential	12000	VB	175	Residential - Single Family	No	No	No	123 WorQ Street	Logan, UT	888-655-1259	haiderson@wv.gov
<input type="checkbox"/>	1009	08/18/2020	062420008	4025 S 750 W	Jon Gobie							New Construction	Development Permit	Jeff Gobie	Residential	125000		10000					4025 S 750 W	Riverdale, UT	1231231234	jeffg@gmail.com

Click on the row of a permit in the table to display the permit's information window

Save or edit selected permits, attach multiple letters or fees, adjust settings and preferences, or print information from the permit view