

Changing Your Password

When a User is created in the PermiTrack application, a password is automatically generated from random letters and numbers and assigned to the new user. That password can be reset by the User or by a Client Administrator for your organization. To change the password:

- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click SETTINGS in the top (black) menu bar
- 3) Click USERS in the grey menu bar; your active USERS will be displayed.
- 4) Select the green edit tool, or click the blue User Name for the USER you want to change passwords for.
- 5) In the EDIT USER screen, select PASSWORD in the blue text menu bar.
- 6) Enter and confirm the new PASSWORD in the boxes provided.
- 7) SAVE your changes. An updated PASSWORD email will be automatically generated and sent to the USER.

Adding a User

A PermiTrack Client Administrator for your organization can create additional USERS in the PermiTrack application as desired. If you are assigned as an Authorized Inspector on PermiTrackESC projects, your new USERS will automatically have access to record inspections for your projects. To add a USER:

- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click SETTINGS in the top (black) menu bar
- 3) Click USERS in the grey menu bar; your active USERS will be displayed.
- 4) Select the NEW (blue text) menu option located above the word "Users."
- 5) In the NEW USER screen, fill in the requested information. Note that there are two Account Types: User will have access to the application and the ability to record inspections on any projects assigned to your organization. Client Administrators will in addition have the ability to edit your User information and to add additional USERS.
- 6) SAVE your changes. An email notification will be sent to your new User with an automatically generated Password.
- 7) *Optional Step – The auto-generated Password will be a random collection of characters and difficult to remember. You may change your new Users PASSWORD to something that is more easily remembered, or they can make that change at any time they are logged into the PermiTrack application.*

Changing the Primary Contact for Your Company

The primary contact for your company in PermiTrack can be changed by doing the following:

- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click on the “Settings” button ----->



- 3) Click on the GREEN “Edit” button above the Name of Your Company.
- 4) Scroll down to “Contact Information” and click on the drop down menu.
- 5) Select the person who is to be the primary contact for your company. If the person’s name does not show up in the drop down menu then you will need to add them first (see the Adding a User guide).

How to Place Your Company Logo on the Inspection Report

If you would like your company logo to appear on your inspection reports along with your company name follow these steps:

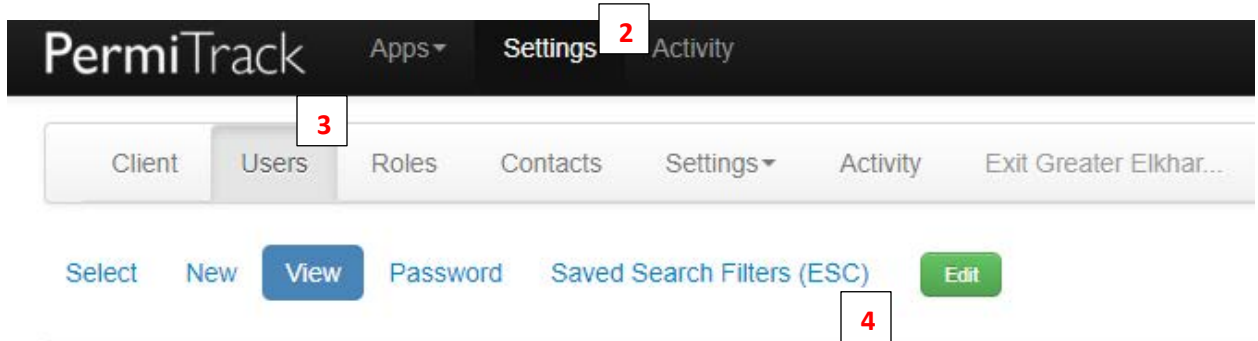
- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click on the Settings Menu in the black menu bar.
- 3) Click on Settings in the grey menu bar and select “Logo”.
- 4) Under the “Report Logo Image” select the “Choose File” button and select your company logo file to upload. This will place your company logo in the upper left hand corner in addition to your company name.

Note: Currently all inspection reports accessed off of the website when you are logged in will have your company logo and name in the upper left hand corner even if your company did not fill out the report. Thus, if you receive an email with a report filled out by another company you will want to print out that report from the email attachment.

How to Create a Saved Search Filter

The Saved Search Filter will allow you to quickly sort the projects associated with your account. Additionally, by following these steps you will make sure you always see all of the projects associated with your account with the status of “Active” or “Auto-Activate.”

- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click on the Settings Menu in the black menu bar.
- 3) Make sure “Users” in the gray toolbar at the top of the screen is selected and select your “User Name” from the list if necessary if it is not already selected.



- 4) Click on the Saved Search Filters (ESC) and click on the green New button.
- 5) You will need to enter a name for the Filter
 - a. If you want this Filter search to always run you will need to check the box underneath the Name Box.

The screenshot shows the 'New Saved Search Filter' form. At the top, the navigation bar is visible with 'Settings' and 'Activity' highlighted. Below the toolbar, the 'Saved Search Filters (ESC)' button is highlighted. The form has a section for 'Name' with a text input field and a checkbox labeled 'Is Default' with the text 'Use this Saved Search Filter as the user's default' (highlighted with a red box labeled '5'). Below this are several input fields for search criteria: 'Permit #' (text), 'Name' (text), 'Address' (text), 'City, State, Zip' (text with a dropdown), 'Status' (text, highlighted with a red box labeled '6'), 'Types' (text), 'Groups' (text), 'Permit Auth' (text), 'Permittee' (text), 'Auth Inspector' (text), 'Total Area' (range), 'Disturbed Area' (range), 'Impervious Area' (range), 'Start Date' (range), 'Effective Date' (range), and 'Seed Date' (range).

- 6) Next, you will want to click in the Status box on the right and select “Active” and “Auto-Activate.”
- 7) Finally, hit the green Save button in the lower right corner.