


# PermiTrack<sub>ESC</sub> User Guidance Notes

**Introduction:** The PermiTrackESC application is available for live online ESC inspection reporting and can be accessed via any Internet connected device. No app to download, just open an Internet browser and enter a Username and Password at [www.MyPermiTrack.com](http://www.MyPermiTrack.com). Select the project you wish to view or inspect from the displayed list.

**Changing Your Password:** When a User is created in the PermiTrack application, a password is automatically generated from random letters and numbers and sent to the user in an email. You or a Client Administrator for your organization can change this to a more user friendly password:

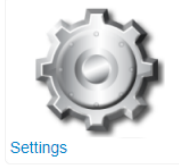
- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click **SETTINGS** in the top (black) menu bar
- 3) Click **USERS** in the grey menu bar to display your active USERS.
- 4) Select the green edit tool , or click the blue User Name for the USER whose password you want to change.
- 5) In the EDIT USER screen, select **PASSWORD** in the blue text menu bar.
- 6) Enter and confirm the new PASSWORD in the boxes provided. The password is case-sensitive and must be at least five characters.
- 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's** have access to the application and can record inspections on any projects assigned to your organization. Client Administrators can also edit your User information and add additional USERS.
- 6) **SAVE** your changes. An email notification will be sent to your new User with an automatically generated Password. *Optional: 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 general information and 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 the **SETTINGS** button
- 3) Click on the green **EDIT** button above the Name of your company or agency.
- 4) Scroll down to CONTACT INFORMATION and click the drop down menu.
- 5) Select the primary contact for your company from the list. If the person's name is not in the list, you will need to first add that person as User (see Adding a User).
- 6) You can also update any of the other Address or General Information on this screen.



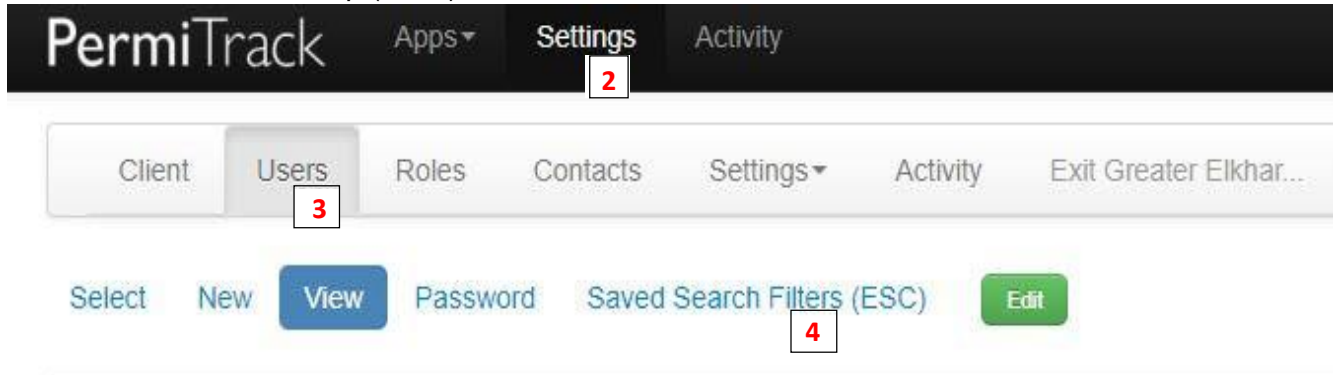
**How to Place Your Company Logo on the Inspection Report:** If you would like your company logo to appear at the top of your inspection reports along with your company name follow these steps:

- 1) Log into the application at <http://www.MyPermiTrack.com>.
- 2) Click **SETTINGS** in the top (black) menu bar.
- 3) Click on **SETTINGS** in the **grey** menu bar and select "Logo".
- 4) Click the **CHOOSE FILE** button next to Report Logo Image and select logo file you wish to use. This will place your company logo in the upper left hand corner of the reports with 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:** Saved Search Filters allow you to control which projects appear on your dashboard based on your preferred selection criteria. Most commonly, Users want to see only Active projects when they log in so they can quickly find the project they want to inspect. Follow these steps to create a Saved Search filter for only your Active projects.

- 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; and select yourself or the User you are creating a Saved Search Filter for.
- 4) Click **SAVED SEARCH FILTERS (ESC)** and then click on the green **NEW** button.
- 5) Enter a descriptive name for the Filter (e.g. Active Projects). Click the Default box if you want this Saved Search to be applied when you log into PermiTrack.
- 6) Next, select "Active" and "Auto- Activate" from the drop-down list in the Status

box to the right.

- 7) Finally, hit the green Save button  in the lower right corner.

Additional Saved Searches to display only specific types of projects can be created following the same process. For example, a Saved Search for ALL PROJECTS can be created by following the same steps but not selecting any of the Status options so the filter is empty.