

# iPermits User Guide

Connected Worker Solutions



# Title and Copyright

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User Guide for **iPermits**, a *Digital Permit-to-Work Solution of Connected Workforce*.

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# Preface

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Use this guide according to your role in the Permit-to-Work or JHA lifecycle.

## Intended Audience

This guide is for Permit Requesters, Reviewers, Authorizers, Field Validators, Issuers, Permit Holders, technicians, JHA participants, supervisors, and authorized template authors.

iPermits Web capabilities are available through the iCWP EHS module. Mobile permit and JHA actions are performed through the iMaintenance mobile application.

## Find the Right Task

| Role                             | Start with                             |
|----------------------------------|----------------------------------------|
| Permit Requester                 | Raise and Plan Permits                 |
| Reviewer                         | Review, Revert, or Reject a Permit     |
| Authorizer                       | Authorize a Permit                     |
| Field Validator                  | Perform Field Validation               |
| Issuer                           | Issue, Hold, Resume, or Close a Permit |
| Permit Holder or Technician      | Execute and Surrender a Permit         |
| JHA Requester or Owner           | Create and Manage JHAs                 |
| Administrator or Template Author | Design and Configure                   |

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# I. Part I: Understand iPermits

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# 1. Introduction to iPermits

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Permits is a digital Permit-to-Work application that helps to manage work permits and Job Hazard Analyses (JHAs) throughout their lifecycle. Depending on your role, you may create, review, approve, issue, execute, or close permits. This guide explains how to perform these tasks using the iPermits Web and Mobile applications.

Use this guide according to your role to raise, review, authorize, issue, execute, monitor, and close permits and JHAs.

iPermits connects several roles across one Permit-to-Work and JHA process.

1. Understand the permit lifecycle, roles, permissions, and available Web and Mobile actions.
2. Raise the correct permit for the work and hand it to the reviewer.
3. Review, authorize, validate when required, and issue the permit.
4. Execute the permitted work, complete configured checks, surrender, and close the permit.
5. Create and approve JHAs, monitor compliance, and configure reusable templates and forms when your role requires it.

After reviewing the product overview and requirements, continue to [Roles and Responsibilities in the Permit Lifecycle \(on page 13\)](#).

## 1.1. Overview of iPermits

---

iPermits is a digital Permit-to-Work solution that helps teams request, review, approve, execute, and close work permits through a structured workflow. The application includes web and mobile versions.

Instead of managing permits on paper, iPermits provides a digital workflow that helps teams create, review, approve, execute, and close permits while improving visibility, collaboration, and compliance.

The iPermits application includes both mobile and web applications.

### iPermits Web App

The Web application is primarily used by Supervisors, Safety/EHS teams, and permit authorities to configure templates, review and approve permit requests, manage workloads, and monitor permit status across units and shifts.

### iPermits Mobile Application

The Mobile application is used by Technicians and Permit Holders in the field to view assigned permits, review hazards and controls, acknowledge safety requirements, capture site conditions, and perform execution-related actions directly from the work location.

Together, the Web and Mobile applications ensure that all authorized users work with the same permit information throughout the permit lifecycle.

Depending on the permit type and plant configuration, a permit may also require a linked Job Hazard Analysis (JHA) before work begins.

The features, screens, and actions available to a user may vary based on assigned role, plant access, and configured permissions.

## 1.2. Benefits of iPermits

iPermits helps teams manage permit-to-work safely, with better visibility and less manual effort.

iPermits supports a controlled Permit-to-Work process by providing:

- **Documented Safety Controls:** Records hazards, controls, approvals, and acknowledgements before work begins.
- **Shared Status Visibility:** Gives authorized users a common view of permit status across teams, shifts, and locations.
- **Reduced Manual Effort:** Reduces reliance on paper permits and manual handovers when creating, reviewing, and tracking permits.
- **Structured Processing:** Connects required reviews and approvals so each role can see and perform the next action.
- **Audit Readiness:** Maintains a central record of permit approvals, execution activity, and closure.

## 1.3. What's New for iPermits

Review the iPermits capabilities introduced in release 2607.

### New Features and Enhancements in Release 2607

**Table 1-1 New Features and Enhancements in Release 2607**

#### **Manage Standalone Permits Without a Work Order**

Complete the Standalone Permit lifecycle from review and authorization through issue, execution, surrender, and closure without linking a work order. Applicable JHAs, isolations, atmospheric logs, attachments, readings, approvals, and extensions remain available.

For more information, see [Execute a Standalone Permit \(on page 73\)](#).

**Table 1-1 New Features and Enhancements in Release 2607 (continued)****Use Single- or Multiple-Instance Forms**

Complete one final submission for a Single-Instance form, or create independently saved and submitted entries for a Multiple-Instance form.

For more information, see [Complete a Single-Instance Permit Form \(on page 74\)](#).

**Receive Permit Expiry Alerts and Request Extensions**

Receive an alert when a permit is nearing expiry, request an extension when permitted, and review extension activity in Permit History.

For more information, see [Request a Permit Extension \(on page 99\)](#).

**Use More Transparent Permit Recommendations**

Review suggested answers with confidence information before accepting them in a Permit form.

For more information, see [Use AI Autofill for a Permit \(on page 35\)](#).

**Use Context-Aware AI Autofill**

Receive suggestions based on the same Permit Template, Equipment, and Operation. Sensitive questions such as Reason for Isolation and Permit Risk are not autofilled.

For more information, see [Use AI Autofill for a Permit \(on page 35\)](#).

**Perform Permit Actions Based on Your Responsibilities**

See and use only the permit actions assigned to your role. Available actions are enforced across Web and mobile.

For more information, see [Role-Based Permissions \(on page 15\)](#).

**Show Permit Plans and Maps Only When Enabled**

Permit Plan and Maps sections appear only when they are enabled for the organization's process.

**See Operation Progress Before Selecting a Work Order**

Review the current operation status from the work-order selection list on Web and mobile before selecting work for a permit.

For more information, see [Choose the Type of Permit to Raise \(on page 32\)](#).

**Table 1-1 New Features and Enhancements in Release 2607 (continued)****Keep Plant Selection Consistent Across EHS Tabs**

The selected plant remains consistent when moving between EHS tabs.

For more information, see [About the Web Application Screens \(on page 23\)](#).

**Review PPE Compliance Activity in Permit History**

Review PPE verification, skipped verification, and photo-capture activity with the user and date/time recorded.

For more information, see [Review PPE Activity \(on page 100\)](#).

**Review Atmospheric Logs and Due-Reading Alerts**

Use configured reading intervals, receive due-reading alerts, and review missed or out-of-range readings in the atmospheric log and Permit History.

For more information, see [Record Atmospheric Readings \(on page 75\)](#).

## 1.4. System Requirements

Review the Web, mobile, storage, and device capabilities required to use iPermits.

The application requires the following minimum system requirements for optimal performance.

| System                                | Minimum Requirement                                                                                                                 |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Compatible OS Platform and Version(s) | 64-bit Windows and Macintosh                                                                                                        |
| Compatible Form Factors               | <ul style="list-style-type: none"><li>• Desktop</li><li>• iOS - Tablets and Phones</li><li>• Android - Tablets and Phones</li></ul> |

| System                                 | Minimum Requirement                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Compatible Device(s)                   | <ul style="list-style-type: none"> <li>• iOS 16 and above</li> <li>• iPad Air 2 and above</li> <li>• iPad 5th generation and above</li> <li>• iPad Mini 4 and above</li> <li>• All iPad Pro models</li> <li>• iPhone 10 and above and iPhone SE2</li> <li>• Android 12</li> <li>• Samsung, Google, One Plus, ECom, and iSafe devices that support Android 12 and above</li> </ul> |
| Compatible Browser(s)                  | Chrome (Best view), Firefox, and Microsoft Edge                                                                                                                                                                                                                                                                                                                                   |
| Device Storage and Memory Requirements | <p><b>Windows</b></p> <p>8GB RAM and a 64-bit operating system with an x64-based processor are preferred.</p> <p><b>Macintosh</b></p> <p>8GB RAM and a 64-bit operating system.</p> <p><b>Mobile</b></p> <ul style="list-style-type: none"> <li>• Android: 6GB RAM and above</li> <li>• iOS: 4GB RAM and above</li> </ul>                                                         |

## 2. Roles and Responsibilities in the Permit Lifecycle

---

Identify which role owns each permit and JHA stage before taking or handing off an action.

Every permit moves through several stages, such as raising, reviewing, authorizing, issuing, executing, and closing. Each stage is assigned to one or more user roles. Your assigned role determines the actions you can perform and the screens you can access in iPermits. Understanding these roles helps you identify your responsibilities during the Permit-to-Work lifecycle.

A single user may perform multiple roles depending on permissions, but each action is governed by the active role at that stage.

Each user role and its corresponding responsibilities are described below:

### Permit Requester

Initiates the permit process and defines the scope of work.

- Create permits using authorized permit templates or linked work orders.
- Clearly define job scope, work location, and work category.
- Initiate and complete **Job Hazard Analysis** (JHA) where required.
- Ensure hazards, precautions, and controls are identified.
- Attach supporting documents and evidence.
- Submit permits within the required timeframe before work starts.

**Who Can Perform This Role:** Supervisor, Planner, Contractor, Technician

### Permit Reviewer

Reviews and validates permit and risk information prior to authorization.

- Review submitted permits for completeness and accuracy
- Validate that work scope and categories are correctly defined
- Review JHA and risk controls for adequacy
- Request rework or revert permits if information is insufficient
- Reject permits that are unsafe or incorrectly defined
- Approve the permit for authorization if all required information is complete and adequate.

**Who Can Perform This Role:** Senior Operator, Engineering or Safety representative.

### Permit Authorizer

Provides formal authorization to proceed with work.

- Perform final authorization of reviewed permits
- Validate that risks, controls, JHA, and isolations are adequate
- Ensure no conflicting work is scheduled in the same area
- Confirm the permit aligns with operational priorities and safety policies
- Approve or reject permits before they are issued.

**Who Can Perform This Role:**Operations Lead, Production Coordinator, Area Manager.

## Permit Issuer

Verifies worksite readiness and safety conditions before execution.

- Verify prerequisite controls and site readiness
- Identify and manage worksite conflicts
- Ensure permit conditions are understood by the Permit Holder
- Issue, hold, resume, suspend, or close permits
- Confirm safe handover between shifts.

**Who Can Perform This Role:**Area Operator, Shift In-Charge, Lead Production Technician.

## Permit Executor

Carries out the physical work on site in accordance with the issued permit and defined safety controls.

- Review the permit details and understand the scope of work before starting
- Follow all permit conditions, safety instructions, and control measures during execution
- Use required PPE and safety equipment as specified in the permit and JHA
- Perform assigned job tasks strictly within the approved scope of work
- Report unsafe conditions, near misses, or deviations to the Permit Holder or Supervisor immediately
- Stop work and escalate if site conditions change or become unsafe.

## Permit Acknowledgement – Technician

Acknowledges the permit before starting work to confirm understanding of the job scope, hazards, and safety controls defined in the permit.

- Review the permit details and associated JHA before starting the work
- Confirm understanding of the work scope, hazards, and control measures specified in the permit
- Acknowledge the permit to indicate acceptance of the defined safety conditions and instructions
- Ensure required PPE and safety precautions are in place and confirm that PPE requirements are followed before commencing work
- Follow all permit conditions while performing the assigned task
- Report any unsafe conditions or changes at the work site to the Permit Holder or Supervisor.

**Who Can Perform This Role:**Technicians, Maintenance Crew Members

## JHA Requestor

Initiates and drafts JHA.

- Define job steps and associated hazards
- Identify precautions and controls
- Link JHA to permits.

**Who Can Perform This Role:** Same as Permit Requestor or Reviewer.

## JHA Team

Provides field-level hazard intelligence.

- Contribute real-world task knowledge
- Identify hazards and safe practices
- Validate job steps and controls
- Perform mandatory work acknowledgement in the field.

**Who Can Perform This Role:** Sr. Technician, Sr. Operator, Sr. Lifting operators, Sr. Workshop technicians, Sr. Safety Engineer can play dual role or a dedicated team defined as Job Hazard Assessment team as JHA member.

## JHA Owner

Reviews whether identified risks and controls are adequate.

- Review and approve JHAs
- Validate hazard identification and controls
- Reject or rework insufficient JHAs.

**Who Can Perform This Role:** Safety coordinators, EHS leads, specialists.

## 2.1. Role-Based Permissions

See which roles can perform which actions at each stage of the Permit and JHA lifecycle, on Web and Mobile.

### Permit Lifecycle – Role vs Action Summary

| Permit Stage | Action         | Role             | Access Mode  |
|--------------|----------------|------------------|--------------|
| Raise        | Save Draft     | Permit Requestor | Web + Mobile |
|              | Raise Permit   |                  |              |
|              | Request Revert |                  |              |

|                                                                       |                      |                   |              |
|-----------------------------------------------------------------------|----------------------|-------------------|--------------|
| Review                                                                | Mark as Reviewed     | Permit Reviewer   | Web + Mobile |
|                                                                       | Revert Permit        |                   |              |
|                                                                       | Reject Permit        |                   |              |
| Authorize                                                             | Mark as Authorized   | Permit Authorizer | Web + Mobile |
|                                                                       | Revert Permit        |                   |              |
|                                                                       | Reject Permit        |                   |              |
| Field validation<br>(Special type Permits like confined space permit) | Validates the Permit | Field Validator   | Mobile       |
| Issue                                                                 | Mark as Issued       | Permit Issuer     | Web + Mobile |
|                                                                       | Hold / Resume Permit |                   |              |
|                                                                       | Reject Permit        |                   |              |
| Execution                                                             | Acknowledge Permit   | Permit Holder     | Mobile Only  |
|                                                                       | Surrender Permit     |                   |              |
| Closure                                                               | Close Permit         | Permit Issuer     | Web + Mobile |

**Key Permission Principles:**

- Actions are enabled or disabled based on the user's assigned role.
- Users only see actions relevant to their role (for example, "Authorize" is only visible to Authorizers).
- Permissions are enforced consistently across Web and Mobile.
- All actions are logged for audit and compliance tracking.

**JHA Lifecycle – Role vs Action Summary**

| JHA Stage      | Action                   | Role          |              |
|----------------|--------------------------|---------------|--------------|
| Template Setup | Author JHA Template      | Admin         | Web          |
| Initiate       | Initiate JHA             | JHA Requestor | Web + Mobile |
|                | Fill Initial JHA Details |               |              |
| Assign         | Review Initiated JHA     | JHA Owner     |              |

|             |                               |                          |
|-------------|-------------------------------|--------------------------|
|             | Assign JHA Team               |                          |
| In Progress | Validate JHA Steps            | JHA Team                 |
|             | Perform Field Acknowledgement |                          |
| Approve     | Approve JHA                   | JHA Owner / JHA Approver |
|             | Close JHA                     |                          |
| Archive     | View Approved/Closed JHAs     | Admin / Owner            |

## 3. Create and Manage Permits

A permit moves through Raise, Review, Authorize, Issue, Execute, and Close. Each stage passes responsibility to the role that owns the next action.

The normal permit lifecycle is:

**Raise → Review → Authorize → Issue → Execute → Close**

When a permit type requires field validation, the lifecycle is:

**Raise → Review → Authorize → Field Validation → Issue → Execute → Close**

| Completed stage | Next owner                       | Next action                                             |
|-----------------|----------------------------------|---------------------------------------------------------|
| Raise           | Permit Reviewer                  | Review the submitted scope, hazards, and controls.      |
| Review          | Permit Authorizer                | Perform authorization checks.                           |
| Authorize       | Field Validator or Permit Issuer | Validate the site when required, then issue the permit. |
| Issue           | Permit Holder or Technician      | Acknowledge and execute the permitted work on Mobile.   |
| Surrender       | Permit Issuer                    | Review completion and close the permit.                 |

Use [Role-Based Permissions \(on page 15\)](#) to confirm the role and platform responsible for a specific action. Execution is performed on Mobile; Web supports the documented lifecycle, monitoring, closure, and administration actions.

### 3.1. Revert, Reject, Hold, Surrender, and Close

Understand what each lifecycle action does and who is responsible next.

Role: Permit Issuer / Reviewer. Platform: Web and Mobile.

| Action | Why it is used                          | Can the process continue? | Next responsible role |
|--------|-----------------------------------------|---------------------------|-----------------------|
| Revert | Information must be corrected           | Yes                       | Previous role         |
| Reject | Permit is invalid or no longer required | No                        | None                  |

| Action    | Why it is used                              | Can the process continue? | Next responsible role |
|-----------|---------------------------------------------|---------------------------|-----------------------|
| Hold      | Conditions temporarily prevent safe work    | Yes                       | Issuer/field team     |
| Surrender | Permit Holder has finished using the permit | Yes, toward closure       | Issuer                |
| Close     | Permit lifecycle is formally complete       | No                        | Archive/reporting     |

## 4. Get Started with the Application

---

Sign in on Web or Mobile, then use the available dashboard and lists to find permit or JHA actions assigned to your role.

After identifying your role and the lifecycle stage you own, sign in on the platform that supports the action.

- [Log in to iPermits Web Application \(on page 20\)](#) for supported review, authorization, issue, monitoring, closure, and administration work.
- [Access iPermits on Mobile \(on page 22\)](#) for supported field and lifecycle actions.

Then open the dashboard or list that contains the permit or JHA action assigned to your role.

### 4.1. Log in to iPermits Web Application

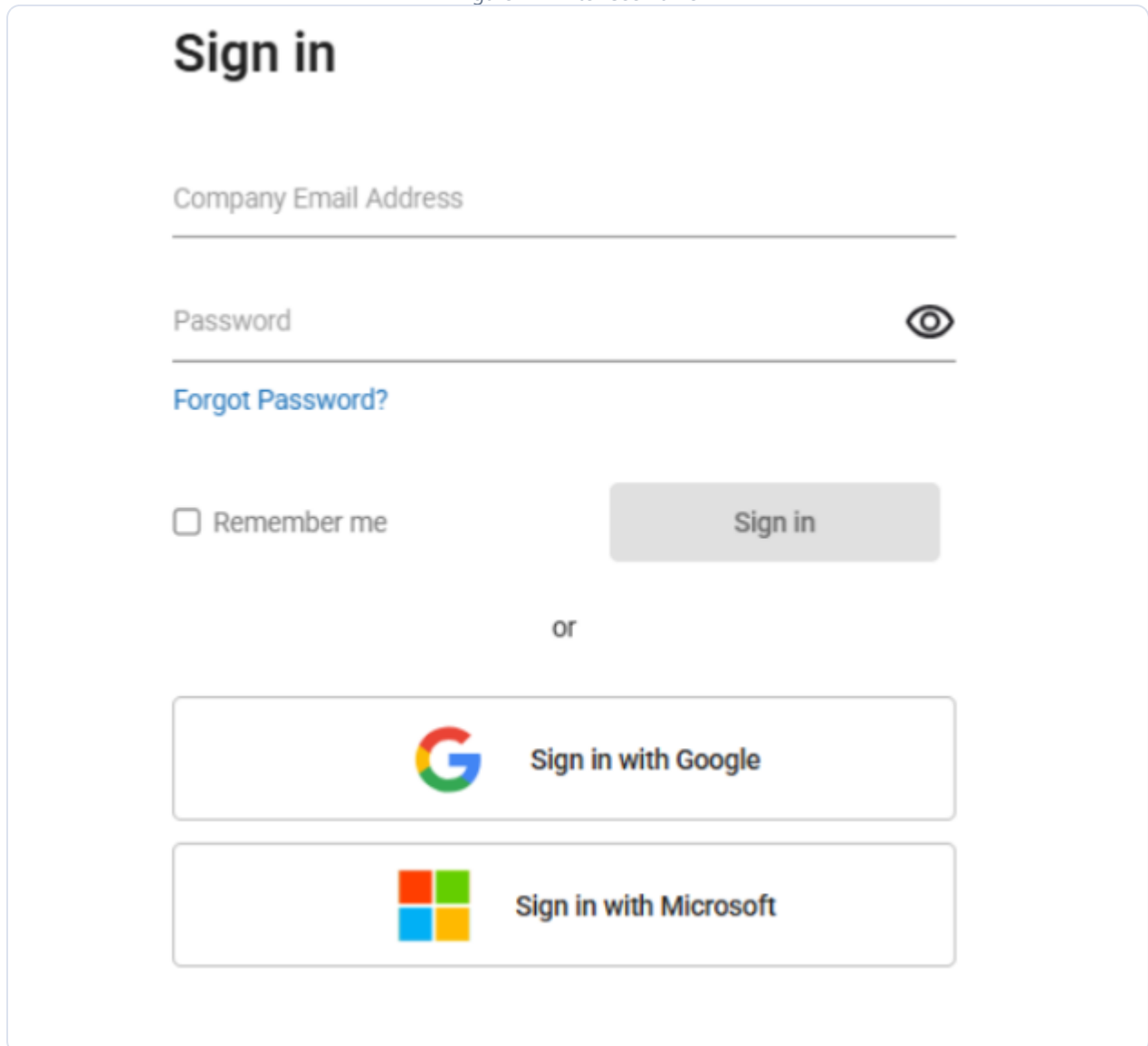
---

Log in to the iPermits application securely using a standard login procedure which involves entering a company or domain, username, and password.

To log in to the web application:

1. Open a supported web browser and navigate to the URL provided by your organization.
2. Enter your Email address and Password provided by organization or single sign-on (SSO) details.
3. Click Sign In to access the home page.

Figure 4-1 Enter Username

The image shows a 'Sign in' web form. At the top, the text 'Sign in' is displayed in a large, bold, black font. Below this, there are two input fields: 'Company Email Address' and 'Password'. The 'Password' field has a small eye icon to its right, indicating a toggle for password visibility. Below the 'Password' field is a link that says 'Forgot Password?'. Underneath the links is a checkbox labeled 'Remember me' and a grey 'Sign in' button. Below these elements is the word 'or' centered. At the bottom, there are two large, rounded rectangular buttons for single sign-on. The first button features the Google 'G' logo and the text 'Sign in with Google'. The second button features the Microsoft logo and the text 'Sign in with Microsoft'.

#### Result

The iCWP EHS home page opens with the actions available to the authenticated user.

Open the Web screen that contains the permit, JHA, monitoring, or administration action assigned to your role.

#### Next action

**Next:** identify the Web screen used for your assigned action. (on page 23)

## 4.2. Access iPermits on Mobile

---

Sign in to iMaintenance and open the permit or JHA actions available for your assigned EHS roles.

Role: Any mobile iPermits user. Platform: iMaintenance Mobile.

The mobile experience uses the same iMaintenance sign-in, passcode, biometric, and synchronization process described in the iMaintenance user guides.

1. Open iMaintenance.
2. Sign in using your organization's authentication method.
3. Complete synchronization.
4. Open the **Permits** or **JHA** tab available for your role.

### Result

Your authorized permit and JHA actions are available in iMaintenance.

Open the assigned record from the Home, Permits, JHA, or Work Order view and continue its current lifecycle stage.

For complete sign-in instructions, see Log In to iMaintenance.

### Next action

**Next:** [identify the Mobile screen used for your assigned action. \(on page 27\)](#)

## 4.3. iPermits Dashboard and Main Screens

---

Use the Web and Mobile screens to find pending actions, active permits, JHAs, expiry risks, templates, and archived records.

Choose the platform view that matches your role and pending action.

- [Web screens \(on page 23\)](#) support monitoring, lifecycle processing, template management, and record review.
- [Mobile screens \(on page 27\)](#) support assigned field actions, permit and JHA review, and supported execution work.

From the selected screen, open the record and continue with its current lifecycle stage rather than moving to another screen description.

## 4.3.1. About the Web Application Screens

---

Use the Web screens to monitor permit activity, process assigned lifecycle actions, manage templates, and review records.

The web application is accessed through the Environment Health & Safety (EHS) module. The EHS module groups all permit-related features and related safety workflows into dedicated screens to support the complete Permit-to-Work process.

Below is a detailed overview of each screen:

### Monitor Permit and Safety Performance (Dashboard)

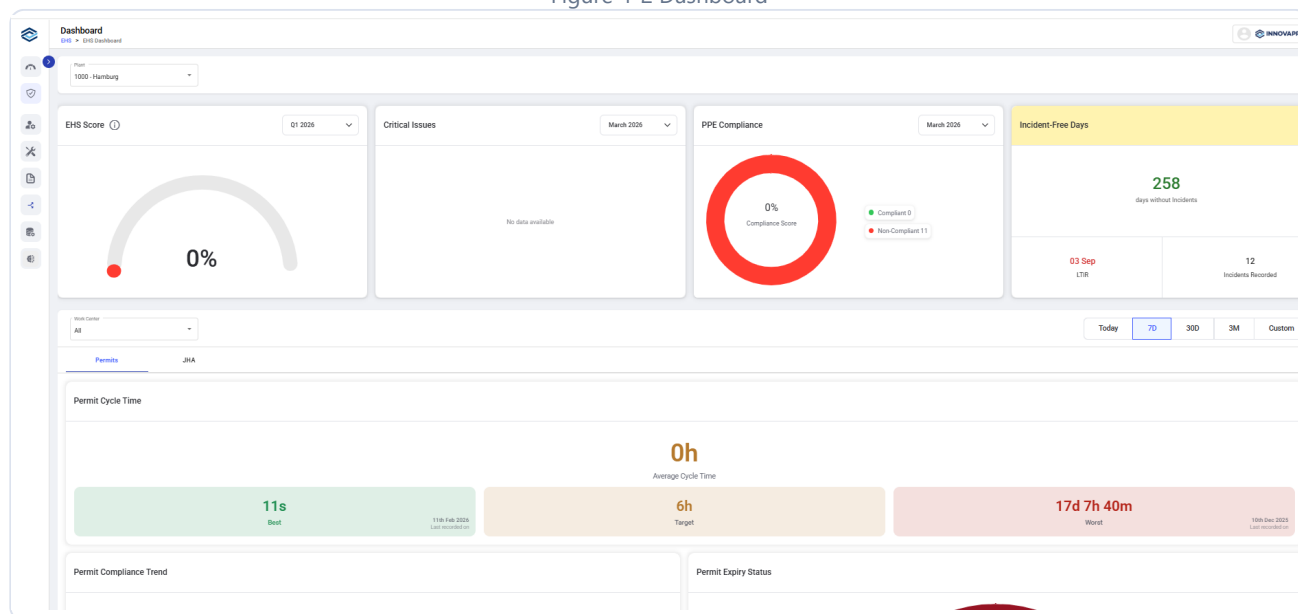
The Dashboard provides a high-level overview of permit and safety performance for the selected plant and time range.

You can use the Dashboard to:

- Select a Plant and Work Center to scope the displayed data.
- View key safety indicators such as:
  - **EHS Score:** Displays the overall EHS performance score for the selected period, based on defined safety parameters.
  - **Critical Issues:** Shows the number of high-risk or priority safety issues identified within the selected timeframe
  - **PPE Compliance:** Indicates the compliance rate of Personal Protective Equipment usage, showing compliant vs non-compliant records.
  - **Incident-Free Days:** Displays the number of consecutive days without a recorded safety incident
- Monitor below:
  - **Permit Cycle Time:** Displays the average time taken for a permit to move from Raise to Close, including best, target, and worst cycle durations.
  - **Permit Compliance Trend:** Displays the percentage trend of permits meeting defined compliance requirements over the selected time period.
  - **Permit Expiry Status:** Shows the total number of permits that are expired or expiring soon to help prevent compliance gaps.
  - **Permits Distribution:** Displays the breakdown of permits by selected category (for example, Type or Status).
  - **Average Closure Rate:** Shows the time taken at different workflow stages (Reviewed, Authorized, Closed) to measure processing efficiency.
- Switch between Permits and JHA views to review different perspectives.

The Dashboard helps Supervisors and Safety teams quickly identify areas that need attention and track overall performance.

Figure 4-2 Dashboard



## View Permits (Permits)

The **Permits** screen is the main place where you view and manage permits. From this screen, you can create new permits, search for existing permits, and take actions on permits based on your role.

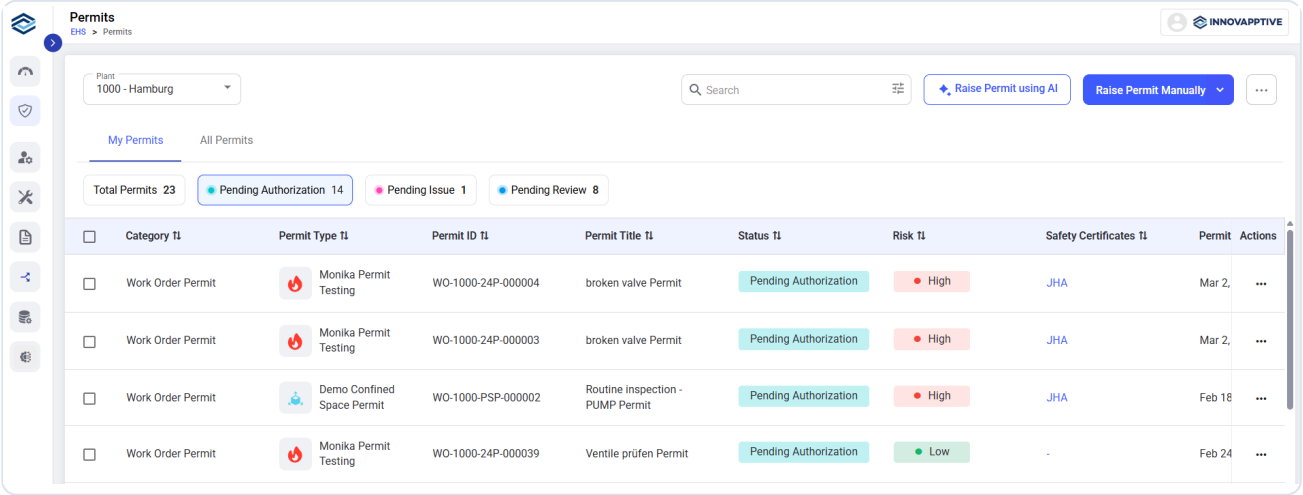
You can switch between **My Permits** (permits assigned to you) and **All Permits** (all permits you are authorized to view). Use the **Plant selector** to view permits for a specific plant. The search bar and filters help you quickly find permits by ID, title, status, or type.

The permit summary indicators at the top provide a quick view of permit status:

- **Total Permits** - Displays the total number of permits in the current view.
- **Pending Authorization** - Shows permits awaiting authorization from the permit authority.
- **Pending Issue** - Displays permits that are approved but not yet issued for execution.
- **Pending Review** - Shows permits awaiting review before authorization.
- **Closed** - Displays permits that have been completed and formally closed.

The permit list shows key details such as **Permit type, Status, and Risk**, and provides an **Actions** menu to perform next steps on each permit.

Figure 4-3 Permit Screen



## View JHAs (JHA)

The JHA screen is used to view and manage Job Hazard Analyses (JHAs) in iPermits. From this screen, you can create new JHAs, review existing JHAs, and link JHAs to permits where required.

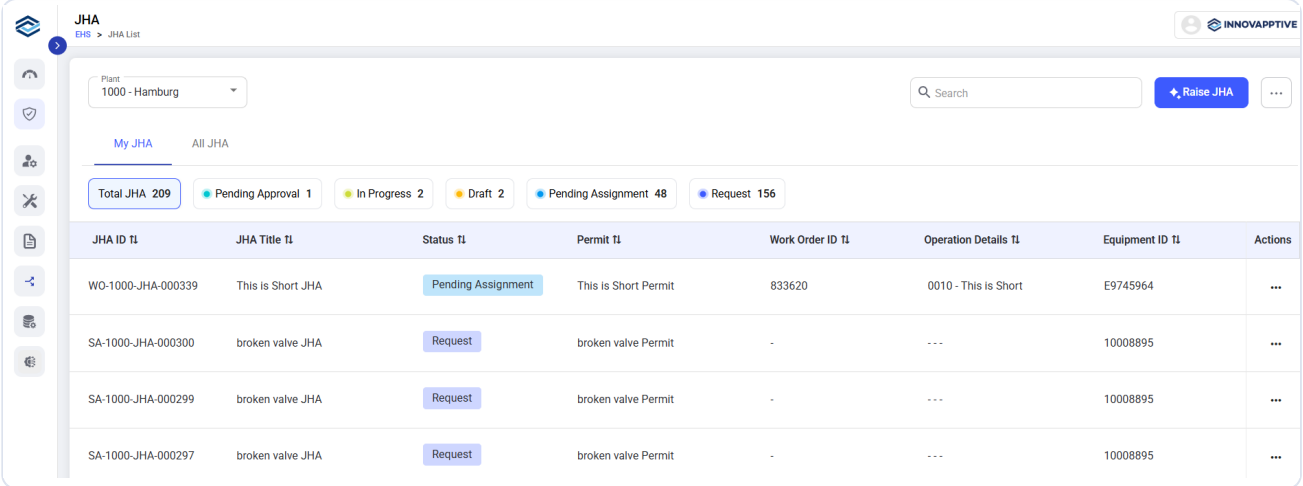
You can switch between **My JHA** (JHAs assigned to you) and **All JHA** (all JHAs you are authorized to view). Use the **Plant selector** to view JHAs for a specific plant. The search bar and filters help you quickly find JHAs by ID, title, status, work order, or equipment.

The JHA summary indicators at the top provide a quick view of JHA status:

- **Total JHA** – Displays the total number of JHAs in the current view.
- **Pending Approval** – Shows JHAs that are awaiting approval from the authorized reviewer.
- **Rejected** – Displays JHAs that were reviewed and rejected and may require corrections.
- **In Progress** – Shows JHAs that are currently being prepared or updated.
- **Pending Assignment** – Displays JHAs that are created but not yet assigned to a responsible user.
- **Closed** – Shows JHAs that have been completed and finalized.

The **JHA list** shows key details such as **JHA ID, title, status, linked permit, and related work order or equipment**.

Figure 4-4 JHA Screen



## Permit Expiry Reports

The **Permit Expiry Reports** screen helps you monitor permits that have expired or are about to expire for the selected plant and time range. This screen provides shift-wise visibility into expired permits and permits that are nearing expiry.

Use the Plant selector and time filters (for example, Last **24 Hours**, **Last Week**, or **Custom**) to scope the report. The list shows the number of Expired permits and Live (Expiring Soon) permits for each shift.

You can use this screen to quickly view the permits that need immediate follow-up, such as closure, extension, or corrective action, based on your role and site procedures.

Figure 4-5 Permit Expiry Reports

Permit Expiry Reports

EHS > Reports

Plant  
1000 - Hamburg

Last 24 HoursLast WeekCustom

Search

| <input type="checkbox"/> | Shift TL                                    | Plant TL | Expired TL | Live (Expiring soon) TL | Actions |
|--------------------------|---------------------------------------------|----------|------------|-------------------------|---------|
| <input type="checkbox"/> | Mar 14, 2026 / Test Shift2<br>16:00 - 23:59 | Hamburg  | 1          | 0                       | ...     |
| <input type="checkbox"/> | Mar 14, 2026 / Test Shift2<br>16:00 - 23:59 | Hamburg  | 1          | 0                       | ...     |
| <input type="checkbox"/> | Mar 13, 2026 / Test Shift1<br>08:00 - 15:59 | Hamburg  | 1          | 0                       | ...     |
| <input type="checkbox"/> | Mar 13, 2026 / Test Shift1<br>08:00 - 15:59 | Hamburg  | 1          | 0                       | ...     |
| <input type="checkbox"/> | Mar 13, 2026 / Test Shift2<br>16:00 - 23:59 | Hamburg  | 2          | 0                       | ...     |

## View Templates (Authoring)

The **Authoring** screen is used to create and manage templates for **Permits JHAs**, and **Forms**. This screen is typically used by Admins who configure standard templates used during permit and JHA creation.

Use the Plant selector to view templates for a specific plant. Switch between the Permits, JHA and Forms tabs to manage different types of templates.

The template list shows the current status of each template (for example, **Draft** or **Published**) and allows you to edit, publish, or manage templates based on your permissions.

Figure 4-6 Authoring Screen

Authoring

EHS > Authoring

Plant  
1000 - Hamburg

22 Templates

Search

Create Using AICreate Manually

PermitsJHAICCForms

| Name                           | Status TL | Last Published By TL | Last Published TL     | Created By TL | Actions |
|--------------------------------|-----------|----------------------|-----------------------|---------------|---------|
| COLD WORK PERMIT               | Published | Mudit Malviya        | Mar 9, 2026 2:47 PM   | Mudit Malviya | ...     |
| Electrical Work Permit<br>Text | Published | Srujana B            | Mar 6, 2026 3:27 PM   | Srujana B     | ...     |
| P01                            | Published | Jayaraju M           | Mar 6, 2026 1:37 PM   | Jayaraju M    | ...     |
| jvnnb                          | Published | Anik Datta           | Mar 10, 2026 9:40 AM  | Anik Datta    | ...     |
| NEW                            | Published | Anik Datta           | Mar 5, 2026 4:40 PM   | Anik Datta    | ...     |
| oiko                           | Draft     | -                    | Feb 13, 2026 12:38 PM | Prathima D    | ...     |

## Archived

The **Archived** screen displays a list of all closed and rejected Permits and JHAs for reference and review. It allows authorized users to view historical records for reference, audits, and compliance purposes.

You can switch between **Permit** and **JHA** tabs to view archived records by type. The list can be scoped by Plant and searched using the search bar. You can sort archived records by columns such as permit type, status, risk, or date, and filter records to quickly find specific permits or JHAs.

**Total Permits** displays all archived permits for the selected plant and filters.

**Closed** displays permits that were successfully completed and closed before being archived.

**Rejected** displays permits that were rejected during the approval process and moved to the archive.

Figure 4-7 Archived Screen

Archived

EHS > Archived

Plant 1000 - Hamburg

Search

Permit JHA

Total Permits 12 Closed 1 Rejected 11

| Category %        | Permit Type %             | Permit ID %        | Permit Title %                                  | Status % | Risk % | Safety Certificates % | Permit Start Date %  |
|-------------------|---------------------------|--------------------|-------------------------------------------------|----------|--------|-----------------------|----------------------|
| Operation Permit  | Work Authorization Permit | OP-1000-WAP-000013 | 0010 Permit                                     | Rejected | Medium | -                     | Feb 17, 2026 5:30 AM |
| Work Order Permit | test conditional ques     | WO-1000-TCP-000002 | Routine inspection - PUMP Permit                | Rejected | -      | -                     | Feb 18, 2026 5:30 AM |
| Work Order Permit | Monika Permit Testing     | WO-1000-24P-000085 | Stromversorgung abtrennen Permit                | Rejected | Low    | -                     | Feb 27, 2026 3:22 PM |
| Work Order Permit | Monika Permit Testing     | WO-1000-24P-000082 | Stromversorgung abtrennen Permit                | Rejected | Low    | -                     | Feb 27, 2026 3:12 PM |
| Work Order Permit | Monika Permit Testing     | WO-1000-24P-000081 | Vvbbbnjjcj j j j j j h h h h h h h h h h Permit | Rejected | Low    | -                     | Feb 27, 2026 3:07 PM |

## 4.3.2. About the Mobile Application Screens

Use the Mobile screens to find assigned field actions, review permits and JHAs, and perform supported execution tasks.

The mobile application provides on-the-go access to manage permits, JHAs, work orders, and safety tasks directly from the field. The main screens are designed for quick visibility of pending actions, active work, and safety compliance, enabling faster decision-making and execution.

### Monitor your Tasks (Home Screen)

The Home screen acts as the landing page of the mobile app and displays the user’s current workload and pending actions.

It displays:

- Immediate attention items such as permits awaiting authorization or validation and provides a summary of pending permit actions based on user permissions.
- Total permits categorized by type (for example, Hot Work, Height Work, Work Authorization).
- Shift details and logged-in user role.
- Quick access to key modules from the bottom navigation.

This screen helps users quickly identify what needs action without navigating into individual modules.

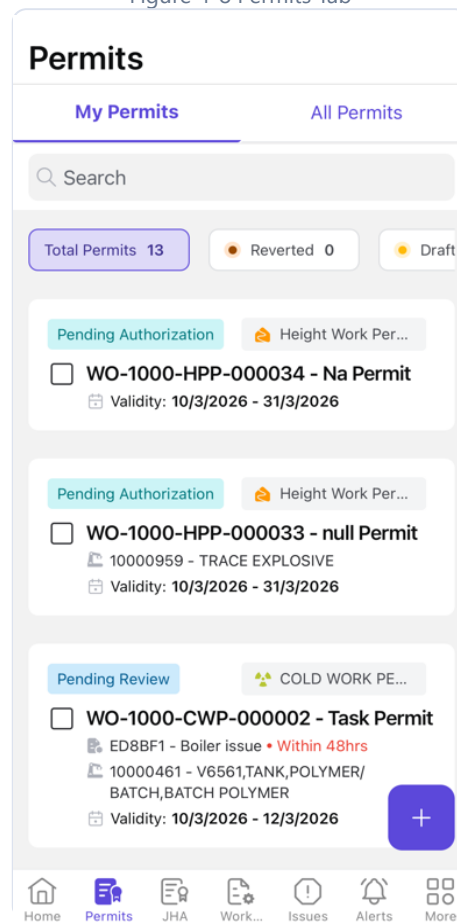
## Permits

The Permits screen allows users to view and manage permits assigned to them or across the plant.

Use the Permits screen to:

- View permits under **My Permits** and **All Permits**.
- Track permit status such as **Draft**, **Pending Authorization**, **Reverted**, and **Active** based on the roles and permissions.
- Search and filter permits.
- Open a permit to review details and take actions such as authorize, validate, or proceed based on role.
- Create new permits.

Figure 4-8 Permits Tab



## JHA

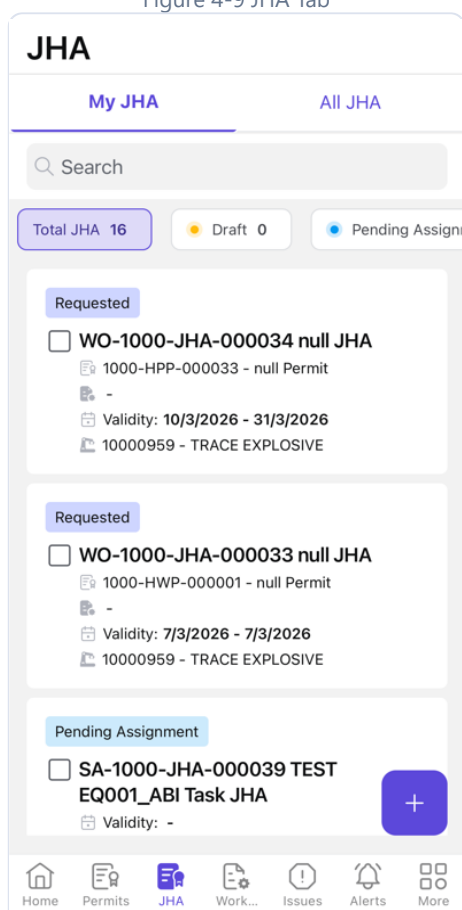
The JHA screen provides access to JHA linked to work activities.

Use the JHA screen to:

- View JHAs assigned to them and all JHAs.
- Track JHA status such as Draft, Pending Assignment, and In Progress.
- Open a JHA to review job steps, hazards, and control measures.
- Perform field acknowledgement and validation as part of JHA execution.
- Create new JHAs

This screen helps field users review and acknowledge hazards before and during job execution.

Figure 4-9 JHA Tab



## Work Order – Permits View

The Permits tab within a Work Order shows all permits associated with that specific job.

Use this screen to:

- View permits linked to the selected work order.
- Track permit status such as Pending Authorization and Pending Field Validation.
- Open permits to review scope, safety details, and compliance requirements.
- Ensure required permits are in place before starting or continuing work.

This view helps ensure that work execution is always aligned with permit-to-work safety requirements.

## II. Part II: Raise and Plan Permits

---

# 1. Choose the Type of Permit to Raise

Choose a work-order-linked or standalone permit, and choose Web or Mobile, based on where the work is tracked and the action available to your role.

## Choose the Route

- **Work is already tracked in iMaintenance:** Raise a work-order-linked permit.
- **Work is tracked outside iMaintenance:** Raise a standalone permit.
- **Platform:** Use Web or Mobile according to the action available to your role.
- **AI Autofill:** Use it only as an input aid in the supported Web route, and verify every suggestion before submission.

After the permit is raised, the Permit Reviewer owns the next lifecycle action.

**Role:** Permit Requester. **Platform:** Web and Mobile.

**Table 5-1 Linked versus Standalone**

| Situation                                    | Permit type                                                                                                            |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Work is tracked by a work order              | Work-order-linked permit — see <a href="#">Raise a Work-Order-Linked Permit (on page 32)</a>                           |
| Only one operation requires the permit       | Operation-level permit — see <a href="#">Raise a Work-Order-Linked Permit (on page 32)</a>                             |
| Several operations require the same permit   | Combined permit — see the Combined Permit section within <a href="#">Raise a Work-Order-Linked Permit (on page 32)</a> |
| Several permit templates must be represented | Consolidated permit                                                                                                    |
| No work order exists                         | Standalone permit — see <a href="#">Raise a Standalone Permit (on page 38)</a>                                         |

## 1.1. Raise a Work-Order-Linked Permit on Web

Raise a permit for a work order or selected operations, then submit it for the configured review stage.

**Role:** Permit Requester. **Platform:** iCWP Web.

Use an operation-level permit when the permit applies to one operation. Use a Combined Permit when the same permit applies to multiple operations under one work order. Use a Consolidated Permit when more than one permit template must be represented in the same permit.

1. Open **EHS** → **Permits**.

2. Select the required plant.

The list contains only plants available to your user account.

3. Click **Raise Permit Manually**.

4. Select the required work order.

5. Select the applicable operation or if the work order contains multiple operations, select the operation(s) that require the permit.

Use the available date, work center, functional location, priority, work-order type, and creator filters to narrow the list.

6. Enable **Combined Permit** If the same permit applies to multiple operations within the selected work order,

7. Click **Continue**.

8. Select the required Permit Type.

9. Enable **Consolidated Permit** only when the work requires multiple permit templates to be managed under a single permit.

10. Click **Proceed**.

← Select Permit Type

WO - This is Short Permit

Work Order Details

Corrective WO

833620 - This is Short

\*\* Long \*\* text Verified that it is working as expected now Components are no longer getting duplicated while performing the release \* wo action No and this is not antoher esnfjs Long text description that might have been need to testn wkengfjds ngjs nawjeknfg \* omgrki ngokndfkrngknfd khlinf kdnhkf fdrkhndskghrsrk nrkhdnkngh h njdvnjcnvxnjdvnjdn jc-jncxj also there is testing going on \* so it affect the lonng text and also \* there hsi sidf

Due

5:30 AM • Feb 3, 2026

Function Location

/Nchine Area Delta Delta

Equipment

PUMP #121

All Permit Types

Consolidated Permit ☒

Conditional Logic Testing

AAAAA

test Permit - Conditional Logic

Electrical Work Permit

VVVVVVVVVV

COLD WORK PERMIT

COLD WORK PERMIT

P01

Proceed

11. Complete the fields defined by the selected permit template.

Review the work scope, validity, risk, crew, PPE, JHA requirement, hazards, controls, additional forms, and attachments shown for the permit.



Note:

The Permit Validity From value cannot be earlier than the current date and time.

WO - Pump issue needing immediate atte Permit

Demo Confined Space Permit

Raise Save & Close

Work Order Details

Breakdown WO

833541 - Pump issue needing immediate attention

The pump is experiencing a pump issue as reported. This condition may affect flow performance and could lead to system downtime. Immediate inspection is required to prevent further damage.

Due

12:00:00 AM • February 11, 2026

Function Location

Ventilat Chauffe 100K Cfm, Porte 1 vc1

Equipment

PUMP

Operations (1/1)

EHS Details

Please fill the EHS Details

Are there any additional safety forms required for this task?

YES

NO

Select applicable additional safety forms

☒ JHA

☐ ICC

SECTION 1: Please fill the Basic Permit Details

Permit Validity From

Feb 11, 2026, 5:30 AM

Permit Validity To

Feb 11, 2026, 5:30 AM

Permit Plan

Map View

Browse files or drag and drop here

Upload Images, PDFs, CAD

Upload Drawing

Comments (0)

History

No comments added

12. Verify all entered information before submitting the permit.

13. Click **Raise** to submit the permit for review.

When the permit requires a JHA, the configured JHA request is initiated as part of the permit workflow.

**Result**

The permit is submitted to the configured review stage and remains linked to the selected work order or operations.

**Next action**

**Next:** The Permit Reviewer owns the next action: review the submitted permit. *(on page 46)*

## 1.1.1. Use AI Autofill for a Permit

Review context-aware suggestions for eligible permit questions before accepting them.

Role: Permit Requester. Platform: Web and Mobile.

AI Autofill uses historical responses from the same Permit Template, Equipment, and Operation, while also considering the question meaning and response type. Suggestions are not final answers.

**Note:**

Sensitive questions such as Reason for Isolation and Permit Risk are not autofilled.

1. Start a permit and select its work, equipment, operation, and Permit Template context.
2. Open the available AI Autofill or recommendation action.
3. Review each suggested response and its confidence information.
4. Accept, edit, or ignore each suggestion.
5. Complete all remaining required fields manually.
6. Review the complete permit before saving or submitting it.

**Result**

The permit contains responses reviewed by the requester rather than unverified AI output. Return to the permit form, verify all remaining fields, and submit through the normal raise procedure.

**Next action**

**Next:** Return to the Web permit-raise procedure. *(on page 32)*

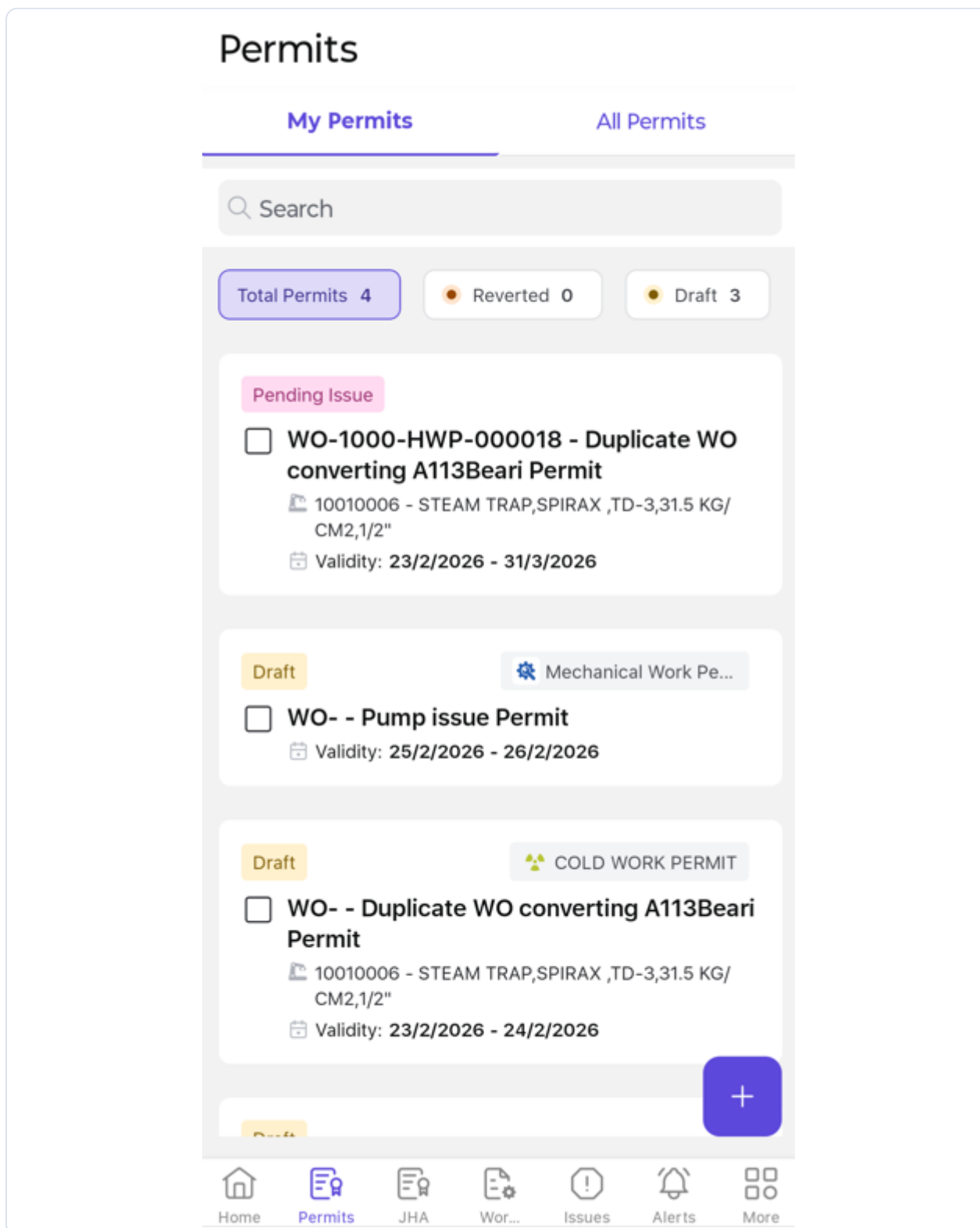
## 1.2. Raise a Work-Order-Linked Permit on Mobile

---

Raise a work-order- or operation-linked permit from Mobile when the action is available to your role, then submit it for review.

**Role:** Permit Requester. **Platform:** iMaintenance Mobile.

1. Open **Permits** in iMaintenance.
2. Tap the **+** action and select **Raise Permit**.



3. Select the required work order and tap **Continue**.
4. Select the applicable operation or operations.
5. Enable **Combined Permit** when one permit applies to multiple selected operations, and tap **Continue**.

6. Select the required Permit Type.
7. Enable **Consolidated Permit** when multiple permit templates must be combined, and tap **Continue**.
8. Complete the configured scope, validity, risk, crew, PPE, JHA, hazard, control, form, and attachment fields.
9. Review the permit details.
10. Tap **Submit** to raise the permit, or tap **Save as Draft** to finish it later.

**Result**

The permit is saved as a draft or submitted to the configured review stage.

**Next action**

**Next:** The Permit Reviewer owns the next action: review the submitted permit. *(on page 46)*

## 1.3. Raise a Standalone Permit on Web

---

Raise a standalone permit for work that may or may not be associated with a work order, then submit it for the standard review and authorization process.

Role: Permit Requester. Platform: iCWP Web.

Standalone permit can associate the permit with an existing work order or use an external reference to track the work.

1. Open **EHS** → **Permits** and select the required plant.
2. Open the **Raise Permit** menu and select **Raise Standalone**.
3. Select the Functional Location and Equipment when applicable.
4. Describe the activity or type of work.

5. In the **Reference Type** field, select one of the following:

- a. **Other** - Select **Other** if no work order exists. The **Reference ID** field appears. Enter the external reference used to track the work, such as a contractor job number, service ticket, or facility work reference.

Figure 5-1 Standalone Permit - without Work Order

The screenshot shows the 'SA- Hydraulic Press Maintenance Permit' form. The 'Reference type' dropdown is set to 'Other'. The 'Reference ID' field contains the text: 'Contractor crew from Acme Services performing scheduled maintenance under contract PO-4471' with a '0/100' character count. The 'COLD WORK PERMIT' section has three input fields: 'PTW Ref. No', 'Contractor', and 'Project Name', each with an 'Enter value' placeholder. The right sidebar shows 'Comments (0)' and 'History' tabs, with a message 'No comments added'.

- b. **Work Order** - Select **Work Order** if the permit is associated with a work order. The **Link Work Order** option appears.



**Note:**

For instructions on associating the permit with a work order, see [Link a Standalone Permit to a Work Order \(on page 40\)](#).

Figure 5-2 Standalone Permit - with Work Order

The screenshot shows the same permit form, but the 'Reference type' dropdown is now set to 'Work Order'. A 'Link Work Order' button has appeared in the left sidebar. The 'Reference ID' field is empty. The 'COLD WORK PERMIT' section and the right sidebar remain the same as in Figure 5-1.

6. Select the Permit Type and complete the configured scope, hazard, control, JHA, PPE, crew, risk, validity, form, and attachment fields.

7. Save the permit as a draft or **submit** it for review.

**Result**

The Standalone Permit is created without a work-order dependency and enters the configured review lifecycle.

Continue with [Execute a Standalone Permit \(on page 73\)](#) after the permit is issued.

**Next action**

**Next:** The Permit Reviewer owns the next action: review the submitted permit. *(on page 46)*

## 1.4. Raise a Standalone Permit on Mobile

---

Create a permit for externally tracked work from iMaintenance mobile.

Role: Permit Requester. Platform: iMaintenance Mobile.

1. Open **Permits** in iMaintenance.
2. Tap the **+** action and select **Raise Standalone Permit**.
3. Select the Functional Location and Equipment when applicable.
4. Describe the activity and select the Permit Type.
5. Enter the external reference information required for the work.
6. Generate the permit and complete the configured scope, hazard, control, JHA, PPE, crew, risk, validity, form, and attachment fields.
7. Save as draft or submit the permit.

**Result**

The Standalone Permit is available for the configured review and authorization stages.

**Next action**

**Next:** The Permit Reviewer owns the next action: review the submitted permit. *(on page 46)*

## 1.5. Link a Standalone Permit to a Work Order

---

Link a standalone permit when the work later becomes associated with an iMaintenance work order.

Role: Permit Requester. Platform: Web and Mobile.

To link a standalone permit to a work order:

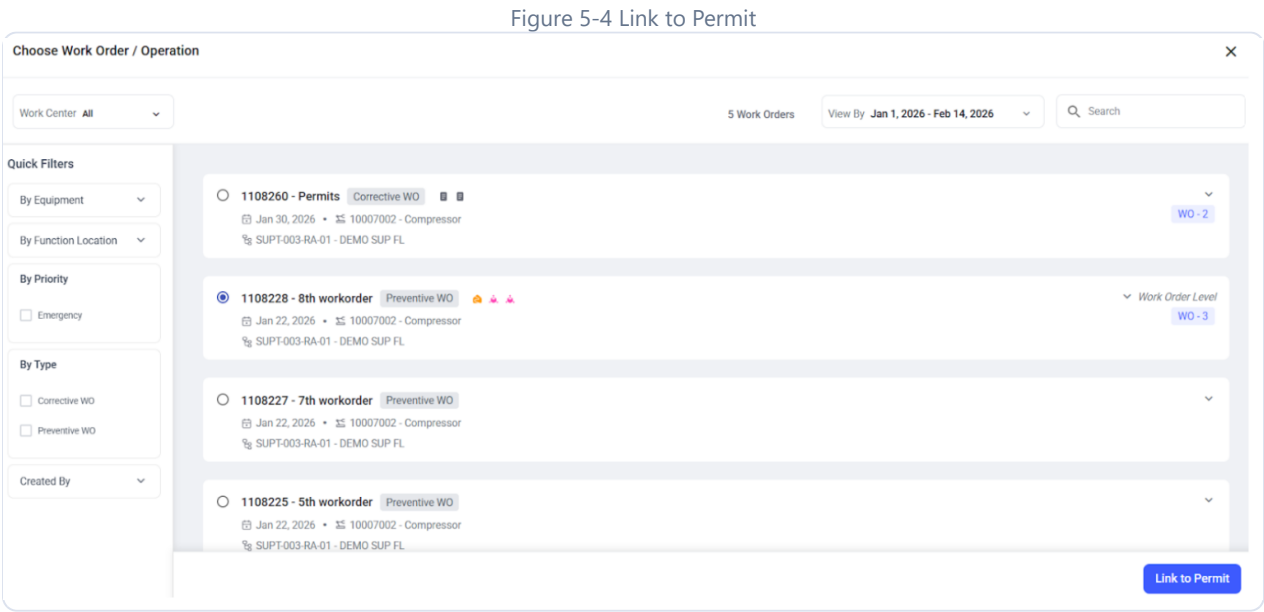
1. Select the permit that needs to be linked to the Work Order.
2. Click **Link Work Order**.

Figure 5-3 Link Work Order

The screenshot shows the 'Link Work Order' interface within the iPermits system. At the top, a progress bar indicates the workflow: 1. Raise (active), 2. Review, 3. Authorize, 4. Issue, 5. Execute, 6. Close. The main header displays 'SA - Cold Work Permit' with a pencil icon for editing and a 'COLD WORK PERMIT' label. Below this, a note states 'ID will be generated upon Submission'. On the left, the 'Activity Details' section shows a search for 'perform' and a list of results: 'Equipment Compressor 1000/7002' and 'Function Location DEMO SUP FL Supt-003-RA-01'. A 'Link Work Order' button is at the bottom of this list. The central 'General Information' tab (labeled '12') contains three required fields: 'PTW Ref. No.' (with a red asterisk), 'Project Name' (with a red asterisk), and 'Contractor' (with a red asterisk). Each field has an 'Enter value' placeholder. On the right, the 'Permit Plan' tab is active, showing a dashed box for uploading files with the text 'Browse files or drag and drop here' and 'Upload Images, PDFs, CAD'. An 'Upload Drawing' button is located below this area. A 'Map View' tab is also visible.

3. In the Choose Work Order / Operation window, review the list of available work orders.
4. Use filters (for example, Work Center, Equipment, Functional Location, Priority, Type, Created By, or date range) to narrow down the work order list, if required.
5. Select the required Work Order.
6. Expand the work order to view its operations, if applicable.

- 7. Select the required Operation(s) to link to the permit.
- 8. Click **Link to Permit**.



- 9. Click **Confirm** to complete the linking.



**Note:**

If the selected Work Order or Operation has a different validity period or risk level than the permit, a warning is displayed indicating a mismatch. On confirmation, the permit’s risk level and validity dates are applied to the linked Work Order/Operation to keep safety information aligned.

**Result**

The permit is linked to the selected work order or operations and the relationship is recorded.

**Next action**

**Next:** Return to the permit record and continue its current lifecycle stage. (on page 18)

# 1.6. Request Permit Reversion

Request reversion after submission when the permit must return to the requester for correction.

Role: Permit Requester. Platform: Web.

To request a reversion:

1. Open the permit that requires reversion from the **All Permits tab**.
2. Click on **Request for Reversion**.
3. Add a **comment** explaining the changes required.
4. Click **Submit**.
5. Once the reviewer approves the reversion request, the permit returns to your list.

#### Result

The reversion request is retained in Permit History. After the permit returns, the requester corrects the relevant details and resubmits it.

#### Next action

Return to the applicable raise or edit route and resubmit the permit. *(on page 32)*

## 1.7. Request Permit Reversion

Request a reversion from the mobile application if details were missed when submitting a permit for review.

Role: Permit Requester. Platform: Mobile.

After submitting a permit for review, the requester can still request a reversion when submitted details must be corrected.

To request a reversion:

1. Go to the **Permit**.
2. Click **Ask for Revert**.
3. Add a comment explaining the changes required (for example, missed to provide PPE details).
4. Click **Submit**.
5. Once the reviewer approves the reversion request, the permit returns to your list.

#### Result

The reversion request is retained in Permit History. After the permit returns, the requester corrects the relevant details and resubmits it.

**Next action**

**Next:** Return to the applicable raise or edit route and resubmit the permit. *(on page 32)*

## III. Part III: Review and Prepare Permits

---

# 1. Review and Revert a Permit

Review the submitted scope, hazards, and controls, then advance the permit to authorization or return it for correction.

Role: Permit Reviewer. Platform: Web.

## Review and Preparation Flow

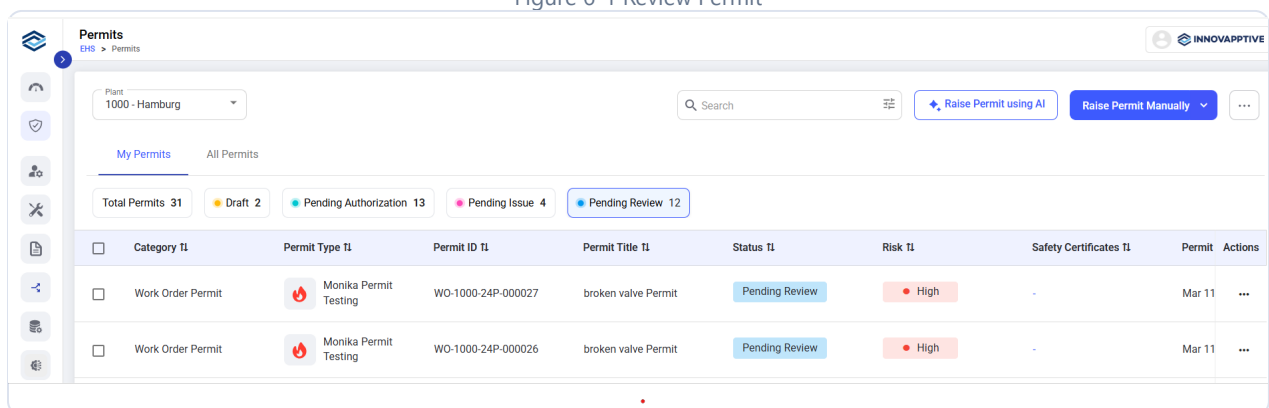
The normal path is **Review** → **Authorize** → **Field Validation when required** → **Issue**.

- **Revert:** Return the permit to the requester for correction.
- **Reject:** End the lifecycle for that permit with the reason retained.
- **Hold and Resume:** Use when conditions prevent progress after the supported stage.
- **Print PDF:** Use as a supporting action, not as a lifecycle stage.

To review the permit, follow the steps below:

1. Go to **EHS** → **Permits** from the left navigation panel.
2. Click **All Permits** or **Pending Review** tab.

Figure 6-1 Review Permit



The screenshot displays the 'Permits' section of the EHS system. At the top, there's a search bar and buttons for 'Raise Permit using AI' and 'Raise Permit Manually'. Below this, a summary bar shows 'Total Permits 31' with breakdowns for 'Draft 2', 'Pending Authorization 13', 'Pending Issue 4', and 'Pending Review 12'. The 'Pending Review' tab is selected. The main table lists permits with columns for Category, Permit Type, Permit ID, Permit Title, Status, Risk, Safety Certificates, Permit, and Actions. Two permits are shown, both with a status of 'Pending Review' and a risk level of 'High'.

| Category TL       | Permit Type TL        | Permit ID TL       | Permit Title TL     | Status TL      | Risk TL | Safety Certificates TL | Permit | Actions |
|-------------------|-----------------------|--------------------|---------------------|----------------|---------|------------------------|--------|---------|
| Work Order Permit | Monika Permit Testing | WO-1000-24P-000027 | broken valve Permit | Pending Review | High    | -                      | Mar 11 | ...     |
| Work Order Permit | Monika Permit Testing | WO-1000-24P-000026 | broken valve Permit | Pending Review | High    | -                      | Mar 11 | ...     |

3. Select the **permit** to review.
4. Review the permit details.

5. Add **comments** if any clarification is required.
6. Click **Review** → **Revert Permit** to send the permit back to the requester, if changes are needed.
7. Click **Review** to approve and move the permit to authorization.

Figure 6-2 Review or Revert Permit

### Result

The permit advances to authorization, or returns to the requester with the required corrections recorded.

### Next action

**Next:** After review, the Permit Authorizer performs the next action. (on page 49)

## 1.1. Review the Permit

Review a permit's work scope, hazards, and safety requirements from the mobile application before it proceeds to authorization.

Role: Permit Reviewer. Platform: Mobile.

After a permit is raised, it moves to Stage 2 (Review) where the reviewer validates the work scope, identified hazards, and safety requirements before allowing the permit to proceed to the next stage.

Follow the steps below to review the permit:

1. Go to the Permits tab.
2. Select the permit to review.
3. Review the permit details.

4. Click **Take Action**.

5. Select one of the following actions:

- a. **Mark as Reviewed:** Approves the review and moves the permit to the next stage (Authorization).
- b. **Revert:** Sends the permit back to the requester if changes or corrections are required.
- c. **Reject:** Rejects the permit if it is unsafe, incorrectly defined, or no longer required.

Figure 6-3 Review the Permit

← Stage 2: Review

**Text Permit**  
1000-LOP-000021 Lifting operatio...

**E884C0 - Breakage**  
0010 - Text

▼ EHS

Are there any additional safety forms required for this task? \*

YES

✓ NO

▼ Basic Permit

Permit Validity From \*  
03/12/2026 12:34

Mark as Reviewed

Revert

Reject

6. Click **Submit** to complete the selected action.

### Result

The permit advances to authorization, returns to the requester for correction, or changes to Rejected according to the selected action.

### Next action

**Next:** After review, the Permit Authorizer performs the next action. (on page 51)

## 1.2. Reject the Permit

---

The reviewer can reject a permit that is unsafe, incorrectly defined, or no longer required.

Role: Permit Reviewer. Platform: Web.

To reject the Permit:

1. Select the permit to Reject.
2. Click **Review** → **Reject Permit**.
3. Provide a reason for the rejection in the **Comment** box.
4. Click **Reject**.

### Result

The permit changes to Rejected and the rejection reason is recorded. This permit lifecycle ends unless a new permit is raised.

### Next action

**Next:** Raise a new permit only when the work still requires one. (*on page 32*)

## 1.3. Authorize the Permit

---

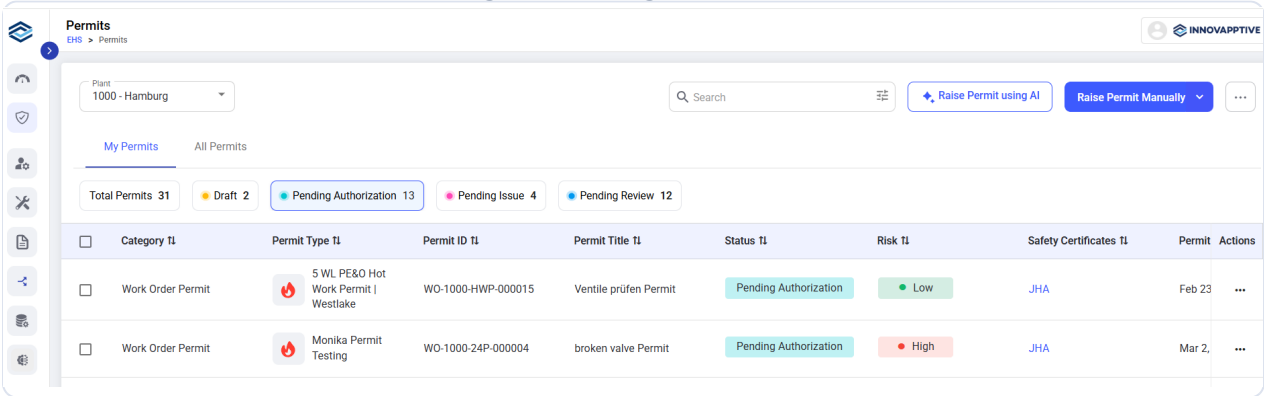
Perform the authorization checks after review, then authorize the permit for field validation or issue, as configured.

Role: Permit Authorizer. Platform: Web.

Follow the steps below to Authorize the permit:

- 1. Navigate to **EHS** → **Permits** from the left navigation panel.
- 2. Click **All Permits** or **Pending Authorization** tab.

Figure 6-4 Pending Authorization



- 3. Select the permit to authorize.
- 4. Review the permit details.
- 5. Update permitted fields, if required.
- 6. Click **Authorize** → **Revert Permit** to send the permit back to the Reviewer if any changes are required.
- 7. Click **Authorize** to authorize and move the permit to the issue stage.

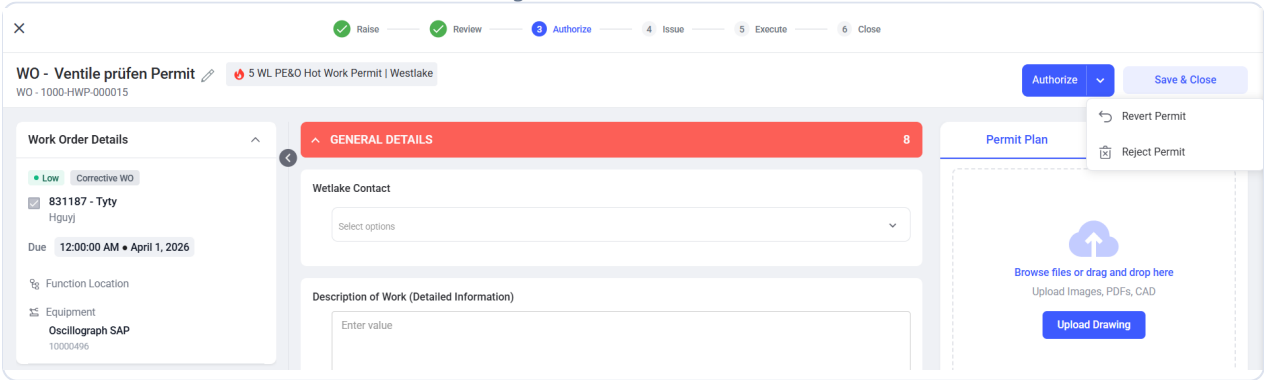


**Note:**

If a permit is raised with a JHA, the Authorizer cannot authorize the permit until the linked JHA is approved.

- 8. Click **Reject Permit** if the permit is not required.

Figure 6-5 Authorize Permit



**Result**

The permit advances to field validation or issue according to its type and configuration.

#### Next action

- Perform field validation when the permit type requires it. *(on page 53)*
- Otherwise, the Permit Issuer verifies readiness and issues the permit. *(on page 53)*

## 1.4. Authorize the Permit

---

Perform final safety validation and authorize a permit from the mobile application.

Role: Permit Authorizer. Platform: Mobile.

Once a permit is reviewed, it moves to **Stage 3 (Authorization)** where the Authorizer performs final validations and confirms that all safety requirements are met before approving the permit to proceed.

Follow the steps below to Authorize the permit:

1. Go to the Permits tab.
2. Select the permit to Authorize.
3. Review the permit details.
4. Click **Take Action**.

5. Select one of the following actions:

- a. **Mark as Authorized:** Approves the permit to the next stage.
- b. **Revert:** Sends the permit back to the requester if changes or corrections are required.
- c. **Reject:** Rejects the permit if it is unsafe, incorrectly defined, or no longer required.

Figure 6-6 Authorize the Permit

The screenshot shows the 'Stage 3: Authorize' screen in the iPermits mobile app. At the top, there's a back arrow and a dropdown menu labeled 'Stage 3: Authorize'. Below this, the permit details are shown: 'PM01 Permit', '1000-HPP-000031', and 'Height Wor...'. A task description '1108964 - oil leaking - T1j2l' and '0010 - \* \* Ventile prüfen' is also visible. A section titled 'EHS' contains a question: 'Are there any additional safety forms required for this task? \*'. Below the question are two buttons: 'YES' and 'NO'. The 'NO' button is highlighted with a red checkmark. Below the 'EHS' section is a 'Basic Permits' section with a 'Permit Validity From \*' field showing '03/03/2026 16:17'. At the bottom, a white modal box displays three actions: 'Mark as Authorized', 'Revert', and 'Reject'.

6. Add **Signature** and **Comment**.

7. Click **Submit** to complete the action and move the permit to the next stage.

**Result**

The permit advances to field validation or issue according to its type and configuration.

**Next action**

- Perform field validation when the permit type requires it. (on page 53)
- Otherwise, the Permit Issuer verifies readiness and issues the permit. (on page 53)

## 1.5. Field Validation (for Special Permits)

---

Perform the required physical site verification before a special permit (such as confined space) can be issued.

Role: Permit Issuer. Platform: Mobile.

Field validation is the final physical verification before a permit can be issued. This stage confirms that actual site conditions match the documented controls.

Follow the steps below to Validate the permit:

1. Visit the job site in person.
2. Verify atmospheric conditions against the defined parameters for the permit type.
3. In the mobile app, open the permit to be validated.
4. Measure and record all required readings.
5. Enter the actual readings in the Field Validator section.
6. Complete field validation and click **Submit**.
7. The permit moves to the Issue stage only after successful validation.

### Result

The field-validation readings and result are recorded, allowing the permit to proceed when the configured criteria are satisfied.

### Next action

After successful field validation, the Permit Issuer issues the permit. (*on page 53*)

## 1.6. Issue the Permit

---

After authorization and any required field validation, verify site readiness and issue the permit for execution.

Role: Permit Issuer. Platform: Web.

In this stage, the issuer can perform one of the following three actions:

- Issue Permit
- Hold Permit
- Reject Permit

Follow the steps below to issue the permit:

1. Navigate to **EHS** → **Permits** from the left navigation panel.
2. Click the **All Permits** or **Pending Issue** tab.
3. Select the permit to issue.
4. Review all permit details.
5. Verify safety controls.
6. Confirm environmental and site conditions are safe.
7. Click **Issue** to move the permit to the next stage.

Figure 6-7 Issue the Permit

WO - broken valve Permit Monika Permit Testing

WO - 1000-24P-000018

Issue Save & Close

Work Order Details

Preventive WO

833640 - broken valve

\*\* broken valve \*\* broken valve \*\* broken valve \*\* broken valve

Due 7:07:00 AM • March 31, 2026

Function Location

Unit 4 • Chauffage mobile 400000 BTU

1000-HSB-M06-68501-68501002

Equipment

MOTOR, AC

10000895

Operations (7/7)

EHS Details 1

Are there any additional safety forms required for this task? ?

YES NO

Basic Permit Details 5

Crew Members

Monika Sunkaraa Yatharth S

Permit Plan Map View

Browse files or drag and drop here

Upload Images, PDFs, CAD

Upload Drawing

Comments (0) History

### Result

The permit is issued and becomes available for the configured execution path.

### Next action

The Permit Holder or Technician now executes the issued permit on Mobile. (on page 62)

## 1.7. Issue the Permit

Formally release an authorized or field-validated permit for execution, from the mobile application.

Role: Permit Issuer. Platform: Mobile.

After authorization or field validation, the permit moves to the Stage 4 (Issue stage), where the issuer formally releases the permit for execution.

Follow the steps below to issue the permit:

1. Go to the Permits tab.
2. Select the permit to issue.
3. Review the permit details.

4. Click **Take Action**.

Figure 6-8 Issue the Permit

The screenshot displays the 'Stage 4: Issue' screen for a permit. At the top, there is a back arrow and a tab labeled 'Stage 4: Issue'. Below this, the permit is identified as 'PM01 Permit' with ID '1000-HPP-000031' and a task 'Height Wor...'. The task description is '1108964 - oil leaking - T1j2l' and '0010 - \* \* Ventile prüfen'. A section titled 'EHS' asks 'Are there any additional safety forms required for this task? \*' with 'YES' and 'NO' options. Below this, a 'Basic Permit s' section contains 'Permit Validity From' (03/03/2026 16:23) and 'Permit Validity To' (03/31/2026 15:45) fields. A large blue 'Take Action' button is at the bottom.

← Stage 4: Issue

**PM01 Permit**

1000-HPP-000031 Height Wor...

1108964 - oil leaking - T1j2l  
0010 - \* \* Ventile prüfen

▼ EHS

Are there any additional safety forms required for this task? \*

YES

✓ NO

▼ Basic Permit s

Permit Validity From \*

03/03/2026 16:23

Permit Validity To \*

03/31/2026 15:45

Take Action

5. Select one of the following actions:

- a. **Mark as Issued:** Issues the permit and moves it to the execution stage.
- b. **Hold:** Temporarily pauses the permit if site conditions are not suitable (for example, unsafe environmental conditions or an unprepared work area).
- c. **Resume:** Continues the permit once site conditions return to normal and the work can proceed safely.
- d. **Reject:** Rejects the permit if it is no longer required.

Figure 6-9 Hold/Issue/Reject the Permit

The screenshot shows the 'Stage 4: Issue' screen in the iPermits mobile app. At the top, there's a back arrow and a 'Stage 4: Issue' dropdown. Below this, the permit details are shown: 'PM01 Permit', '1000-HPP-000031', and 'Height Wor...'. A task description '1108964 - oil leaking - T1j2l' and '0010 - \* \* Ventile prüfen' is also visible. A section titled 'EHS' contains a question: 'Are there any additional safety forms required for this task? \*'. Below the question are two buttons: 'YES' and 'NO' (which is selected with a checkmark). Another section titled 'Basic Permit s' shows 'Permit Validity From \*' with a date and time '03/03/2026 16:23'. At the bottom, a white menu is open with three options: 'Mark as Issued', 'Hold Permit', and 'Reject'.

6. Add your signature in the Signature block.

7. Click **Submit** to move the permit to the Execute stage.

**Result**

The permit is issued and becomes available for the configured execution path.

**Next action**

The Permit Holder or Technician now executes the issued permit on Mobile. (on page 62)

## 1.8. Hold the Permit

Place the permit on Hold when site or environmental conditions prevent execution; resume it only after the conditions are revalidated.

Role: Permit Issuer. Platform: Web and Mobile.

Follow the steps below to hold the permit:

1. Navigate to **EHS** → **Permits** from the left navigation panel.
2. Click the **All Permits** or **Pending Issue** tab.
3. Select the permit that needs to be kept on hold.
4. Click the dropdown arrow on the **Issue** button.
5. Select **Hold** Permit.
6. Provide a **comment** specifying the reason for keeping the permit on Hold.
7. Click **Hold** to place the permit on Hold.

Figure 6-10 Hold the Permit

The screenshot shows the iPermits web interface for a permit titled "WO - broken valve Permit". The status bar at the top indicates the current step is "Issue". The "Issue" button is highlighted, and a dropdown menu is open, showing options to "Reject Permit" or "Hold Permit". The main form area is divided into several sections: "Work Order Details" (showing "833640 - broken valve" and "Unit A @ Chauffage mobile 400000 BTU"), "EHS Details" (with a question "Are there any additional safety forms required for this task?"), "Basic Permit Details" (showing "Crew Members" as "Monika Sunkaraa" and "Yatharth S"), and "Permit Plan" (with an "Upload Drawing" button). The bottom right shows "Comments (0)" and "History".

### Result

The permit changes to the held state and cannot proceed until an authorized user resumes it.

### Next action

Resume the permit only after the blocking conditions are revalidated. (on page 59)

## 1.9. Resume a Held Permit

---

Return a held permit to execution after site conditions and controls have been revalidated.

Role: Permit Issuer. Platform: Web and Mobile.

1. Open the held permit.
2. Review the hold reason and confirm that the site, environmental, isolation, PPE, atmospheric, and work-area conditions are acceptable.
3. Open the available permit action and select **Resume**.
4. Add the required signature and comments.
5. Submit the action.
6. Notify the Permit Holder that work may resume.

### Result

The permit returns to the executable state and the resume action is recorded in Permit History.

### Next action

[Return to the applicable permit-execution route. \(on page 62\)](#)

## 1.10. Print Permit as PDF

---

Generate and print a PDF version of the permit for field use, compliance, or audit purposes.

Role: Permit Issuer. Platform: Web.

At the Issue stage, you can generate and print a PDF version of the permit for field use, compliance, or audit purposes.

To print the permit:

1. Click the **Print** icon at the top-right of the screen.
2. The Print Manager screen opens with a preview of the permit PDF.
3. Select the required content options (for example, Permits, Evidences, Attachments, Signature).

4. Use the annotation tools available in the toolbar to highlight or mark important sections, and adjust color, thickness, or opacity if required.
5. Click **Print Document**.
6. Print the permit and provide it to the field team for reference or compliance documentation.

Figure 6-11 Print Permit

The screenshot shows the 'Print Manager' window in the iPermits application. The top navigation bar indicates the current stage is 'Issue' (highlighted in blue), with previous stages 'Raise', 'Review', and 'Authorize' marked as complete. The 'Print Manager' sidebar on the left allows selecting content to include in the permit PDF, with options for 'Select All', 'Permits', 'Evidences', 'Attachments', and 'Signature'. The main area displays a preview of the generated permit document. The document header includes the 'INNOVAPPTIVE' logo and a QR code. The permit details are as follows:

| Permit Type           | Activity | Description | Risk   |
|-----------------------|----------|-------------|--------|
| Monika Permit Testing |          |             | Medium |

| Requester | Reviewer   | Approver     | Issuer |
|-----------|------------|--------------|--------|
| -         | Yatharth S | Vijay Sharma | -      |

**Location Details**

| Plant / Unit | F.Loc           | Equipment                   |
|--------------|-----------------|-----------------------------|
| 1000         | 1000-000-000001 | 100000002 PUMP, CENTRIFUGAL |

**Permit Validity**

| From                   | To                     | Total Duration   |
|------------------------|------------------------|------------------|
| Mar 13, 2025, 08:27 AM | Mar 31, 2025, 08:27 AM | 17 days 23 hours |

**EHS Details**

Are there any additional safety forms required for this task? ☐ NO

Select the additional required forms:

**Basic Permit Details**

| Crew Members        |
|---------------------|
| 1. Monika Surkarass |

**Note:**

The generated permit PDF includes a **QR code** that can be scanned using the mobile application to quickly access the permit details in the field.

**Result**

The permit PDF is generated with the selected content and QR code when applicable.

**Next action**

Return to the permit record and continue its current lifecycle stage. (on page 46)

## IV. Part IV: Execute and Close Permits

---

# 1. Execute an Operation-Level Permit

---

On Mobile, claim the operation, acknowledge the permit, complete required controls, perform the work, and surrender the permit.

The normal operation-level path is:

1. Claim or select the operation.
2. Acknowledge the permit.
3. Add supporting personnel when required.
4. Validate PPE and required controls.
5. Start and perform the work.
6. Complete configured forms and readings.
7. End the work and surrender the permit.
8. The Permit Issuer reviews and closes the permit.

Hold work only when conditions prevent execution. After completing a form, reading, or alert branch, return to the active permit and continue the remaining checks.

Begin with [Claim or Select the Operation \(on page 64\)](#).

## Related information

Execute a Work Order (on page )

## 1.1. Scan Permit Using QR Code

---

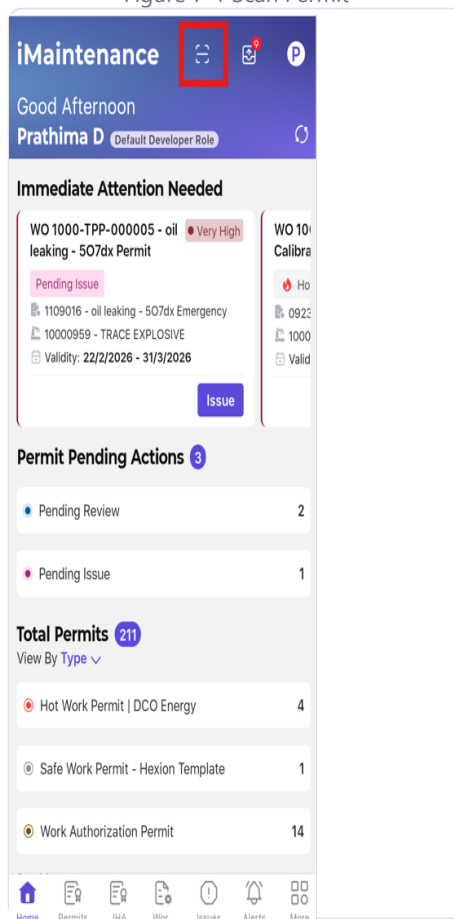
Scan a QR code from a printed or digital permit to quickly access and open the permit in the mobile application without manual search.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

To scan the QR code:

1. Open the iPermits mobile application.
2. Use the scanner functionality available in the app.

Figure 7-1 Scan Permit



3. Scan the QR code displayed on the permit.

The permit opens directly in the application, allowing you to view details and proceed with actions such as acknowledgement or execution.

**Note:**

QR code is available in the **permit PDF** generated from the Web application after the Authorization stage.

**Note:**

QR Scan access depends on the permissions assigned to your role:

- If you don't have any QR Scan permission, the scanner option won't appear on your Home screen.
- With View permission, you can see permit details via QR Scan but can't acknowledge
- With Add Acknowledgement permission, you can acknowledge the permit directly from the QR Scan workflow.

### Result

The permitted record opens with the view or acknowledgement actions allowed for the user's role.

### Next action

**Next:** Continue with the lifecycle action available to your role. *(on page 62)*

## 1.2. Claim or Select the Operation

---

Open the issued permit and claim the operation you will perform.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

After a permit is issued, it moves to **Stage 5 (Execute)**.

1. Open the issued permit.
2. Select the required operation.
3. Tap **Assign to Me** to assign the operation to yourself.

### Result

The operation is assigned to you and is ready for permit acknowledgement.

### Next action

**Next:** acknowledge the permit. *(on page 64)*

## 1.3. Acknowledge a Permit

---

Answer the mandatory acknowledgement questions before starting permitted work.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

1. Tap **Acknowledge** and answer all mandatory questions.

Figure 7-2 Acknowledge the Permit

2. Tap **Submit** to provide your acknowledgment.

### Result

Your acknowledgement is recorded against the permit before execution continues.

### Next action

**Next:** Add supporting personnel when required; otherwise continue to PPE and control validation. (on page 65)

### Related information

Acknowledge the Permit for Your Job (on page )

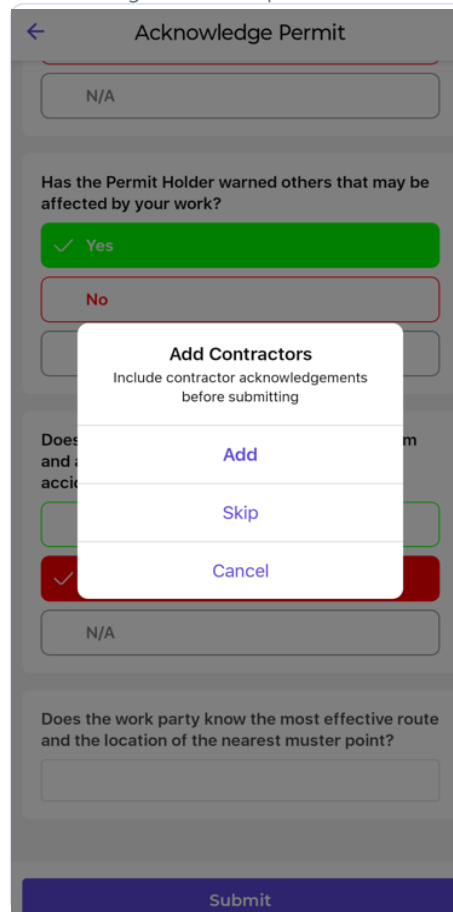
## 1.4. Add Supporting Personnel

Add additional personnel to the operation if the permitted work requires them.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

1. If additional personnel are required for support, choose one of the following options:
  - a. **Add**: Add personnel to the operation.
  - b. **Skip**: Proceed without adding personnel.
  - c. **Cancel**: Cancel the request.

Figure 7-3 Add personnel



2. If adding personnel, enter the required details:
  - a. Name
  - b. Signature
3. Tap **Confirm** to save the details.

#### Result

The selected personnel details are added to the operation, or the optional step is skipped.

#### Next action

**Next:** validate PPE and required controls. (on page 67)

## 1.5. Validate PPE and Required Controls

---

Confirm the configured PPE and safety controls before beginning permitted work.

Role: Permit Holder or Technician. Platform: iMaintenance Mobile.

Complete PPE verification whenever it is configured for the permit. The unavailable or not-applicable path is controlled by the permit workflow; it is not a way to bypass a required check.

1. Open the PPE validation section.
2. Review the PPE required by the permit and JHA.
3. Confirm the available PPE and complete the configured verification questions.
4. Capture a PPE photo when the workflow requests evidence.
5. Submit the PPE activity.
6. Resolve any missing PPE or control before starting work.

### Result

The PPE activity is recorded with the user and date/time. Captured photos remain with the permit record and can be reviewed in Permit History.

### Next action

**Next:** After required controls are recorded, start the permitted work. (on page 67)

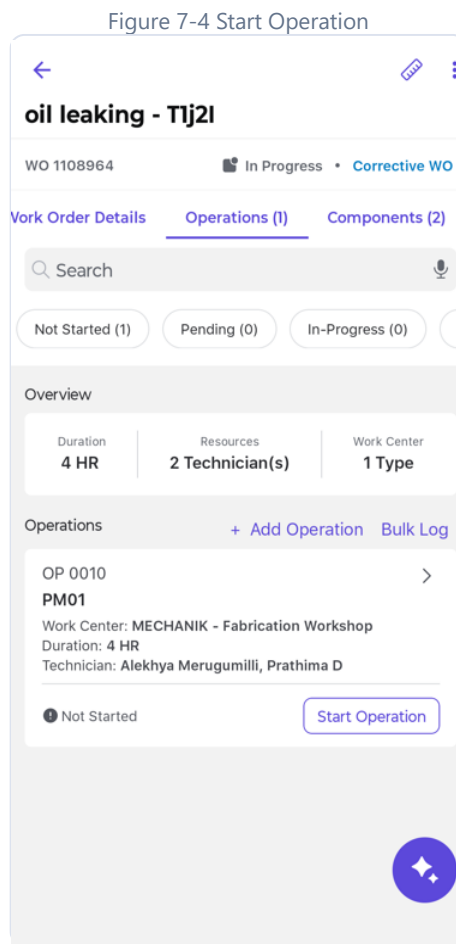
## 1.6. Start and Perform the Work

---

Start the operation and perform the work under the conditions stated on the permit.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

1. Tap **Start Operation** to begin the work.



2. Perform the work as per the permit conditions.

### Result

The operation is in progress and remains governed by the permit conditions until the work is ended or placed on hold.

### Next action

#### Next:

- Complete the forms and safety checks shown during execution. *(on page 74)*
- When the work and required checks are complete, end the work. *(on page 69)*
- Hold work when conditions no longer support execution. *(on page 69)*

## 1.7. Hold Work

---

Pause permitted work when conditions no longer support safe execution.

Role: Permit Holder or Technician. Platform: iMaintenance Mobile.

Use this action when site, environmental, equipment, permit, or safety conditions change during execution.

1. Stop the physical work.
2. Open the active work or permit and select **Hold** when that action is available.
3. Enter the reason for holding the work.
4. Notify the Permit Issuer or supervisor and follow the site escalation process.
5. Do not resume until the Permit Issuer has restored the permit to an executable state and the blocking condition is resolved.

### Result

The work remains paused and the hold reason is retained with the permit or operation record.

### Next action

**Next:** After the blocking condition is resolved and the permit can continue, return to the active work. (on page 67)

## 1.8. End the Work

---

End the operation after the permitted work is complete, then surrender the permit to the Issuer.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

1. Tap **End Operation** after completing the work.
2. Tap **Submit** to end the operation.
3. Review the success message confirming that the operation is completed.

### Result

The operation is completed and the permit is ready to be surrendered to the Permit Issuer.

**Next action****Next:** [surrender the permit to the Issuer. \(on page 70\)](#)

## 1.9. Surrender the Permit

Once the permitted work is complete, surrender the permit to release it back to the Issuer.

Role: Permit Holder / Technician. Platform: iMaintenance Mobile.

Surrendering hands the permit back once work is finished. It moves the permit toward closure but does not close it — closure is performed by the Issuer. See [Close the Permit \(on page 79\)](#).

1. Confirm the applicable work is complete.
2. Once the operation is complete, select the surrender action.
3. Add **Signature** and **Comment**.
4. Tap **Confirm** to surrender the permit.

Figure 7-5 Surrender the Permit

The screenshot displays the 'Surrender Permit' interface on a mobile device. At the top, there is a back arrow and the title 'Surrender Permit'. Below the title, a prompt 'Add your signature below' is followed by a large rectangular box containing a handwritten signature. A red 'X' icon and the text 'Clear Signature' are positioned at the bottom right of the signature box. Underneath the signature box is a 'Comment' field with a red asterisk, containing the text 'Completed'. At the very bottom of the screen is a prominent blue button labeled 'Confirm'.

### Result

The surrender action is recorded and the permit returns to the Permit Issuer for closure.

### Next action

**Next:** The Permit Issuer reviews and closes the surrendered permit. (*on page 78*)

### Related information

Surrender the Permit (*on page* )

## 2. Execute a Work-Order-Level Permit Without Operations

---

Acknowledge, execute, and surrender a permit linked directly to a work order that has no operations.

Role: Permit Holder or Technician. Platform: iMaintenance Mobile.

The permit must be issued and linked at work-order level.

1. Open the work order in iMaintenance.
2. Open the **Permits** tab and select the issued work-order-level permit.
3. Review the scope, validity, JHA, hazards, controls, PPE, forms, and required readings.
4. Acknowledge the permit and complete all mandatory questions.
5. Add supporting personnel and complete PPE, atmospheric, form, and other checks shown for the permit.
6. Begin the work using the work-order-level execution action available in your configuration.
7. Perform the work within the approved scope and record the required evidence.
8. Surrender the permit before completing the work order.

### Result

The work-order-level permit is surrendered and is ready for issuer closure. No operation is required for this execution path.

### Next action

**Next:** The Permit Issuer can now close the surrendered work-order-level permit. *(on page 78)*

## 3. Execute a Standalone Permit

---

Perform permitted work that is tracked by an external reference rather than an iMaintenance work order.

Role: Permit Holder or Technician. Platform: iMaintenance Mobile.

The Standalone Permit must be reviewed, authorized, and issued before execution.

1. Open **Permits** in iMaintenance and select the issued Standalone Permit.
2. Review the external reference, work scope, Functional Location, Equipment, validity, JHA, hazards, and controls.
3. Acknowledge the permit and complete mandatory questions.
4. Add supporting personnel and complete required PPE, atmospheric, isolation, form, and attachment actions.
5. Start the permitted activity using the available execution action.
6. Perform the work within the approved scope.
7. Record required readings, checks, forms, and evidence.
8. When the work is complete, add the required surrender signature and comments and confirm the surrender.

### Result

The Standalone Permit changes to the surrendered state and can be closed by the Permit Issuer without a work-order link.

### Next action

**Next:** The Permit Issuer can now close the surrendered standalone permit. (*on page 78*)

## 4. Complete Permit Forms and Safety Checks

During execution, complete each configured permit form and atmospheric check before the workflow can advance.

**Role:** Permit Holder, Technician, Field Validator, or other assigned role. **Platform:** iMaintenance Mobile.

The actions shown depend on the permit template, form Instance Type, permit status, role permissions, and site process.

| What is shown                            | Use                                                                   |
|------------------------------------------|-----------------------------------------------------------------------|
| A form allows one submission.            | <a href="#">Complete a Single-Instance Permit Form (on page 74)</a>   |
| A form allows separate repeated entries. | <a href="#">Complete a Multiple-Instance Permit Form (on page 75)</a> |
| An atmospheric reading is due.           | <a href="#">Record Atmospheric Readings (on page 75)</a>              |
| A reading alert appears.                 | <a href="#">Respond to an Atmospheric Reading Alert (on page 76)</a>  |

After each submission or reading, return to the active permit and complete any remaining checks. Continue to end and surrender the work only after all required checks are complete.

### 4.1. Complete a Single-Instance Permit Form

Complete the one allowed submission for a form configured as Single Instance.

Role: Permit participant with form-edit permission. Platform: Web or iMaintenance Mobile.

A Single-Instance form allows one final submission. In-progress responses are saved in the background.

1. Open the linked form from the permit.
2. Complete the required fields and resolve validation messages.
3. Review the automatically saved responses.
4. Select **Submit** to make the final submission, or **Cancel** to leave without submitting.

#### Result

The form is submitted once and remains linked to the permit. A new independent entry cannot be added for the same Single-Instance form.

#### Next action

**Next:** Return to the active permit and complete the remaining work and checks. *(on page 67)*

## 4.2. Complete a Multiple-Instance Permit Form

Create separate form entries when the linked form allows more than one instance.

Role: Permit participant with form-edit permission. Platform: Web or iMaintenance Mobile.

Each entry has its own draft, submission, and synchronization state.

1. Open the linked Multiple-Instance form.
2. Add a new entry.
3. Complete the required fields.
4. Select **Save** to keep the entry as a draft, **Submit** to submit it, or **Cancel** to discard the current changes.
5. Add another entry when the work requires a separate record.
6. Review the status of each entry before permit surrender or closure.

#### Result

Each form entry is retained independently with its own status and synchronization result.

#### Next action

**Next:** Return to the active permit and complete the remaining work and checks. *(on page 67)*

## 4.3. Record Atmospheric Readings

Enter atmospheric readings at the interval configured for the permit.

Role: Field Validator, Permit Holder, or assigned reader. Platform: iMaintenance Mobile.

The required gases, limits, and interval depend on the permit template and site process.

1. Open the permit and select **Atmospheric Log**.
2. Review the next due time and the configured acceptable ranges.
3. Enter the measured readings.
4. Submit the entry.
5. Review the recorded status and timestamp.
6. Stop work and follow the site escalation process when a reading is outside the approved range.

#### Result

The reading is added to the atmospheric log with its user, date/time, and status.

#### Next action

**Next:** Return to the active permit and complete the remaining work and checks. *(on page 67)*

## 4.4. Respond to an Atmospheric Reading Alert

Record a due reading promptly and respond to missed or out-of-range results.

Role: Assigned mobile permit user. Platform: iMaintenance Mobile.

When enabled, the application uses sound, vibration, and a pop-up alert when an atmospheric reading is due.

1. Open the atmospheric-reading alert.
2. Open the related permit and Atmospheric Log.
3. Take and submit the required reading.
4. If the due reading was missed, review the automatically recorded **Skipped - No Entry Logged** event.
5. If the result is out of range, stop work and notify the Permit Issuer according to the approved process.

#### Result

The atmospheric log clearly identifies completed, missed, and out-of-range readings. Missed and out-of-range events notify the Permit Issuer when configured.

### Next action

**Next:** Return to the active permit and complete the remaining work and checks. *(on page 67)*

# 5. Close the Permit

Review and formally close a permit after work is completed and surrendered.

## Closure Handoff

Closure begins after the Permit Holder completes and surrenders the permitted work. The Permit Issuer reviews the surrendered record and closes it on Web or Mobile. The closed record then becomes available in permit history and archive views.

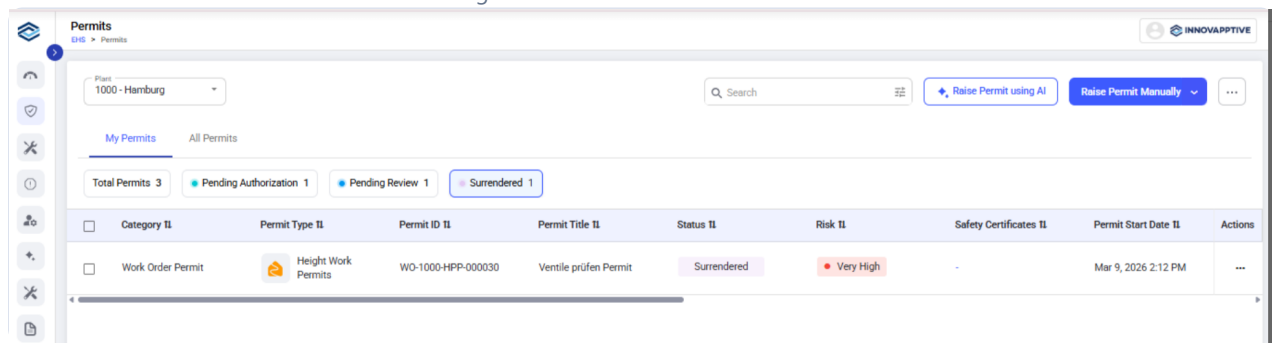
Role: Permit Issuer. Platform: Web.

After the work is completed and the permit is surrendered from the Mobile application, the Permit Issuer can review and formally close the permit.

To close the permit, follow the steps below:

- 1. Navigate to **EHS → Permits**.
- 2. Go to the **Surrendered** tab.

Figure 11-1 Surrendered Permits Tab



- 3. Select the required permit to close.

4. Open the permit and review for Work completion status, Execution details and logs etc.
5. Verify:
  - a. All operations are completed
  - b. The permit has been surrendered
  - c. No open safety issues remain.
6. Click **Close** Permit.

Figure 11-2 Close the Permit

The screenshot shows the 'Close the Permit' interface. At the top, a progress bar indicates the workflow: Raise, Review, Authorize, Issue, Execute, and Close (the final step, highlighted with a blue dot). Below this, the permit title 'WO - Ventile prüfen Permit' and ID 'WO - 1000-HPP-000030' are shown. The interface is divided into several panels. On the left, 'Work Order Details' includes a 'Corrective WO' section with a task '6E8249 - PUMP - Clean Pump' and its description. It also shows the due date '10:09:00 AM • March 31, 2026', function location 'Ventilat Chauffe 100K Cfm, Porte 1 vc1', and equipment 'PUMP'. The 'Operations' section shows '2/2' completed. The 'EHS Details' section is also visible. The main central area contains 'SECTION 1: EHS' with a question 'Are there any additional safety forms required for this task?' and 'SECTION 2: BASIC PERMITS DETAILS' with fields for 'Permit Validity From' (Mar 9, 2026, 2:12 PM) and 'Permit Validity To' (Mar 31, 2026, 3:39 PM). A 'Risk' section shows 'Very High' selected. On the right, the 'Permit Plan' section has an 'Upload Drawing' button. Below it, the 'Comments (1)' section shows a comment from 'Bhumika Trivedi' with status 'Surrendered'.

### Result

The permit changes to Closed and becomes available in history and archive views.

### Next action

**Next:** Review the closed record in Permit History when follow-up or audit evidence is needed. (on page 100)

## 5.1. Close the Permit

Review and formally close a surrendered permit from the mobile application.

Role: Permit Issuer. Platform: Mobile.

After the work is completed and the permit is surrendered, the Permit Issuer reviews the permit details and site conditions before formally closing the permit. This confirms that the work has been completed safely and all required records are captured.

Follow the steps below to close the permit:

1. Open the surrendered permit.
2. Verify that the work is completed.
3. Verify that site conditions are safe and all required logs are recorded.
4. Click **Close** to formally close the permit linked to the work order.

Figure 11-3 Close the Permit. Review and formally close a surrendered permit from the mobile application.

The screenshot shows the 'Stage 6: Close' screen in the iPermits mobile application. At the top, there is a back arrow and a 'Stage 6: Close' button with a dropdown arrow. Below this, the permit title 'oil leaking - 507dx Permit' is displayed, followed by the permit ID '1000-HPP-000037' and a tag 'Height Wor...'. A section titled '1109015 - oil leaking - 507dx' with the task '0010 - \* Ventile prüfen' is shown with a dropdown arrow. The 'EHS' section is expanded, showing a question: 'Are there any additional safety forms required for this task? \*'. There are two buttons: 'YES' (green) and 'NO' (red with a checkmark). Below this is the 'Basic Permit s' section, which contains two date pickers: 'Permit Validity From \*' set to '03/03/2026 16:52' and 'Permit Validity To \*' set to '03/25/2026 05:30'. At the bottom, there is a large blue 'Close' button.

### Result

The permit changes to Closed and the closure action is retained in Permit History.

### Next action

**Next:** Review the closed record in Permit History when follow-up or audit evidence is needed. (on page 100)

# V. Part V: Create and Manage JHAs

---

# 1. Create and Manage JHA

---

Create a JHA, assign the field team, record work acknowledgement, and submit the validated hazards and controls for approval.

## JHA Workflow

The normal path is **Raise** → **Assign Team** → **Work Acknowledgement** → **Approve**.

- After Raise, the JHA Owner assigns the field team.
- After Assignment, team members review and acknowledge the job steps, hazards, and controls.
- After all required acknowledgements, the JHA Owner or Approver approves, reverts, or rejects the JHA.
- After approval, return to the linked permit or work activity.

Web and Mobile topics are parallel ways to perform a stage; they are not consecutive steps.

JHA is integrated with the Permit-to-Work process. When a permit requires a JHA, the permit cannot proceed to authorization until the linked JHA is approved. This adds a formal review of hazard identification and risk controls before the permit is issued and work begins.

JHA follows a defined lifecycle to ensure hazards are reviewed and acknowledged before work execution.

A JHA typically goes through the following stages:

**Initiate** → **Assign** → **In Progress** → **Approve**

At each stage, different users (such as Requester, JHA Owner, or JHA Team) perform specific actions to ensure hazards are properly evaluated and controlled.

Refer to Section [Role-Based Permissions \(on page 15\)](#) for detailed information on which roles can **initiate**, **assign**, and **approve** JHAs.

## 1.1. Raise a JHA

---

Create a new Job Hazard Analysis from a predefined template, defining job steps, hazards, and control measures.

Role: JHA Requestor. Platform: Web.

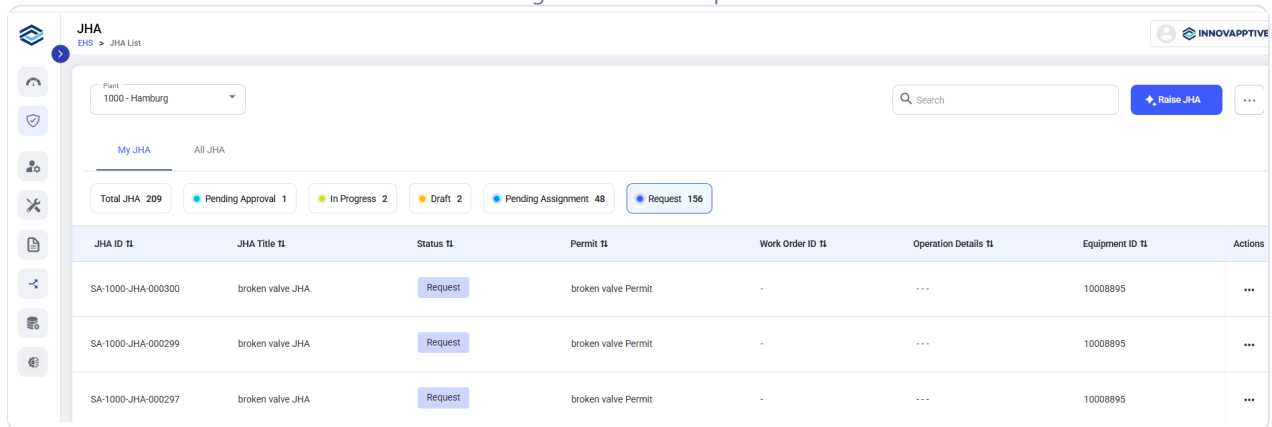
Use this procedure to create a new JHA based on a predefined template. During this process, you define the activity, break it into job steps, and identify hazards and control measures.

The JHA Requestor initiates a JHA by selecting a predefined template and filling in the required details.

To raise a JHA:

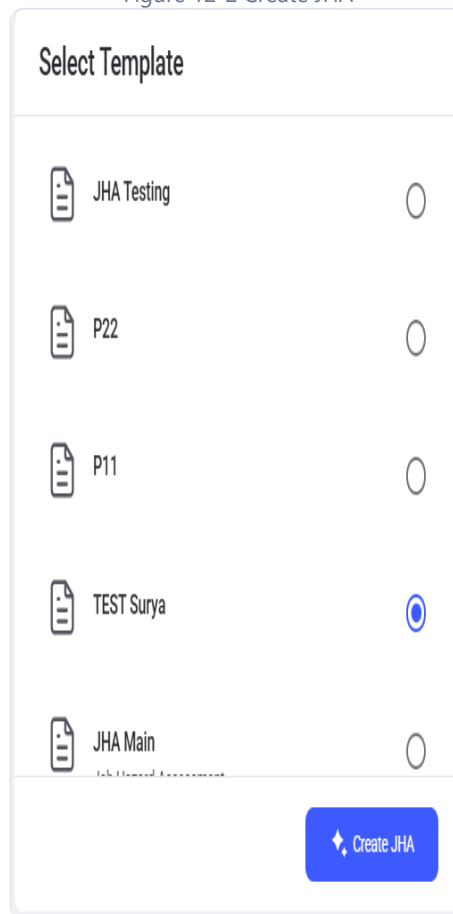
1. Navigate to **EHS** → **JHA** from the left navigation panel.
2. Go to the Request tab and click Request Received.

Figure 12-1 JHA Request



3. Select the required template from the Select Template screen if multiple JHA templates are available.
4. Click **Create JHA** (or)

Figure 12-2 Create JHA



5. Click **Raise JHA** at the top right corner.

6. Provide the required details in the JHA Details screen:

- a. **Functional Location** - Select the location where the work is to be performed.
- b. **Equipment** - Select the equipment associated with the work, if applicable.
- c. **Define Activity** - Specify the activity or task for which the JHA is being created

Figure 12-3 Raise JHA

The screenshot displays the 'JHA Setup' modal window in the iPermits application. The modal contains the following fields:

- Function Location \***: A dropdown menu showing 'FL update AAAA-BBBB-AA-22'.
- Equipment**: A dropdown menu showing 'update eq 10143789'.
- Activity Description \***: A text area containing 'Perform maintenance on Hydraulic press' with a character count of 39/250.

A 'Continue' button is located at the bottom right of the modal. In the background, the 'JHA List' screen is visible, showing a table with the following data:

| JHA ID T1          | JHA Title T1     |
|--------------------|------------------|
| SA-1000-JHA-000300 | broken valve JHA |
| SA-1000-JHA-000299 | broken valve JHA |
| SA-1000-JHA-000297 | broken valve JHA |
| SA-1000-JHA-000296 | broken valve JHA |

7. Define job steps, add predefined questions linked to each step.

8. For each job step:

- Select applicable **Hazards**
- Define corresponding **Control Measures**
- Assign the appropriate **Risk Level**.

9. Add Questions.

10. Upload supporting documents or images and add notes for additional context.

11. Add new steps or questions as required.

12. Click **Submit**.

The JHA ID is generated automatically upon submission.

The JHA is now submitted and moves to the **Assign** stage.

### Result

The JHA is created and moves to the assignment stage.

### Next action

**Next:** The JHA Owner assigns the field team next. *(on page 87)*

## 1.2. Raise JHA

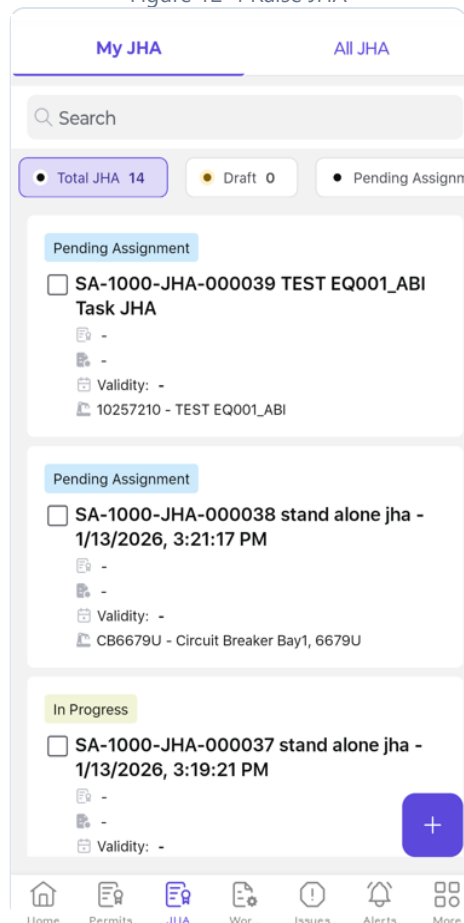
Raise a JHA from Mobile by defining the job, selecting the template, and submitting the hazards and controls for assignment.

Role: JHA Requestor. Platform: Mobile.

To raise a JHA:

1. Click the **JHA** tab.
2. Click the **+** icon.

Figure 12-4 Raise JHA



3. Select **Create JHA**.

4. Provide the required details in the JHA Details screen:
  - a. **Functional Location** - Select the location where the work is to be performed.
  - b. **Equipment** - Select the equipment associated with the work.
  - c. **Define Activity** - Specify the activity or task for which the JHA is being created.
5. Select the appropriate JHA Template from the dropdown.
6. Click **Generate JHA**.
7. Define Job Steps and add the predefined questions linked to each step.
8. Click **Submit Request**.

Figure 12-5 Submit JHA

The screenshot shows a mobile application interface for 'JHA Details'. At the top is a back arrow and the title 'JHA Details'. Below this are four form sections, each with a red asterisk indicating a required field. The first section, 'Functional Location', has a dropdown menu showing 'Pump station' and '00-B01'. The second section, 'Equipment', has a dropdown menu showing 'Electric pump 001' and 'TEY-00'. The third section, 'Define Activity', contains a text area with the text 'Perform maintenance on the hydraulic press, ensuring proper safety procedures are followed.' The fourth section, 'Template', has a dropdown menu showing a long text description: 'OSHA Job Safety and Health: There is no single "OSHA template title"; rather, the specific title depends on the document you need, such as the "Job Safety and Health: It's the Law" poster for employee rights or a document titled a "Regional/Area Office Annual Report. Testing ..'. At the bottom of the screen is a blue button with a white lightning bolt icon and the text 'Generate JHA'.

### Result

The JHA is created and moves to the assignment stage.

### Next action

**Next:** The JHA Owner assigns the field team next. (on page 87)

## 1.3. Assign JHA

After a JHA is submitted, it moves to the Assign stage. At this stage, the JHA Owner assigns the JHA Team responsible for field validation.

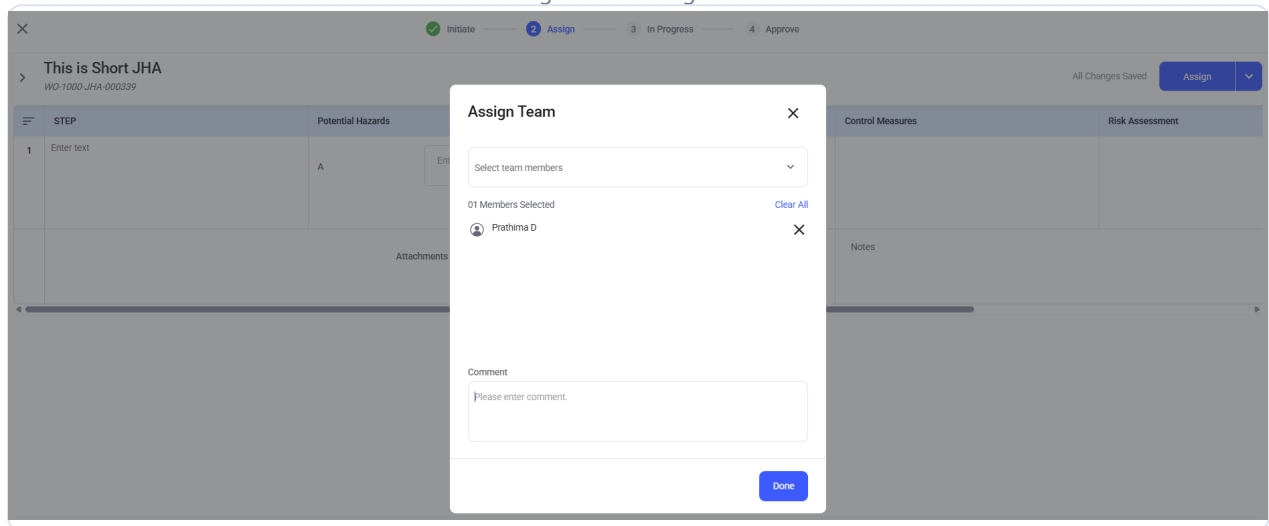
Role: JHA Requestor. Platform: Web.

JHA must be assigned to the appropriate team for review and acknowledgement.

To Assign JHA:

1. Navigate to **EHS** → **JHA** from the left navigation panel.
2. Click the **Pending Assignment** or **Total JHA** tab and select the JHA that needs to be assigned.
3. Click **Assign**.
4. In the Assign Team screen, select the required team members from the dropdown list.
5. Add any necessary **comments** and click **Done**.

Figure 12-6 Assign JHA



The JHA is now assigned to the selected team and moves to **In Progress** stage.

### Result

The selected JHA Team is assigned and the JHA moves to In Progress.

### Next action

**Next:** Assigned team members now review and acknowledge the JHA. (on page 89)

## 1.4. Assign JHA

Assign the required field participants so they can review and acknowledge the JHA before approval.

Role: JHA Requestor. Platform: Mobile.

To Assign JHA:

1. Click the **JHA tab**.
2. Go to the **Total JHA** or **Pending Assignment** tab.
3. Select the JHA that needs to be assigned.
4. Click **Take Action**.
5. The following options are available:
  - a. **Assign** – Assign the JHA to a team.
  - b. **Reject** – Reject the JHA if it is not required.

Figure 12-7 Assign / Reject JHA

The screenshot shows a mobile application interface for assigning or rejecting a Job Hazard Analysis (JHA). The top bar indicates 'Stage 2: Assign'. The JHA title is 'Electric pump 001 JHA' with ID 'SA-1000-JHA-000033'. A '0/0' status indicator is visible. The 'Steps' section lists four tasks: 'Isolate relevant circuit breaker from the Main control unit', 'Potential Hazards', 'Mobilize equipment to workshop', and 'Move replacement motor into maintenance area'. At the bottom, there are two buttons: 'Assign' and 'Reject'.

6. Click **Assign**.

7. The Assign Team screen appears.
8. Select the required Team Members from the dropdown list.
9. Click **Confirm**.

Figure 12-8 Assign Team to JHA

The screenshot shows the 'Assign Team' modal overlaid on the 'Electric pump 001 JHA' screen. The modal includes a 'Cancel' button, a title 'Assign Team', a 'Team Members' dropdown menu, a list of selected team members (Prathima D), a 'Clear All' link, and a 'Confirm' button.

### Result

The selected JHA Team is assigned and the JHA moves to In Progress.

### Next action

**Next:** Assigned team members now review and acknowledge the JHA. (on page 89)

## 1.5. Work Acknowledgement

Assigned team members must review the JHA and acknowledge the defined hazards and control measures before work begins.

Role: JHA Team / Permit Holder. Platform: Web.

Steps for Work Acknowledgement:

1. Navigate to **EHS** → **JHA** from the left navigation panel.
2. Go to the **In Progress** tab and select the JHA that needs to be validated.
3. Review the job steps, potential hazards, and control measures on the field.
4. Click **Work Acknowledgement**.
5. Change your status from **In Progress** to **Completed**, add comments if required.
6. Click **Done**.
7. After all assigned team members complete their acknowledgement, click **Submit** to proceed.

Figure 12-9 Work Acknowledgement

The screenshot shows a web application interface for a Job Hazard Analysis (JHA). The main window displays a JHA titled "Fix Motherboard Overheating - 2B2 JHA" with ID "WO-1000-JHA-020063". It has a progress bar with four steps: Initiate, Assign, In Progress (current), and Approve. The "In Progress" step is highlighted. Below the progress bar, there are sections for "STEP", "Potential Hazards", "Control Measures", and "Risk Assessment". A modal window titled "Work Acknowledgement" is open in the foreground. It shows the user "Prathima D (Me)" with a status of "Completed" and a "Mark all as completed" link. There is a "Comment" field with a placeholder "Add Comment" and a "Done" button at the bottom right.

### Things to remember:

- Each assigned JHA Team member must complete Work Acknowledgement.
- The JHA cannot move forward for approval until all acknowledgements are completed.
- If the JHA is sent back for updates, team members must re-acknowledge after changes are made.

### Result

The team member acknowledgement is recorded; the JHA can proceed after all required members complete acknowledgement.

### Next action

**Next:** After all required acknowledgements, the JHA Owner or Approver reviews the JHA. (on page 93)

## 1.6. Work Acknowledgement

Work acknowledgement confirms that all assigned team members have reviewed and understood the job steps, associated hazards, and required control measures before executing the task.

Role: JHA Team / Permit Holder. Platform: Mobile.

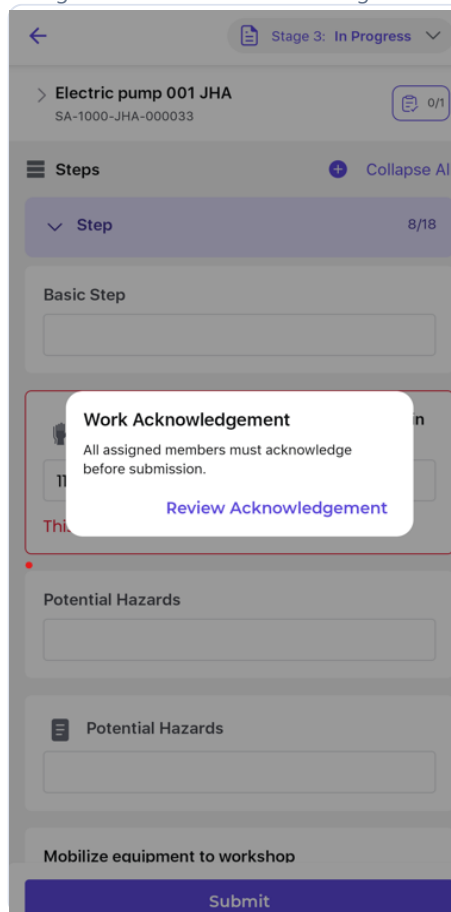
To acknowledge the JHA:

1. Go to the All JHA tab and select the JHA that needs to be acknowledged.
2. Review the **job steps**, **potential hazards**, and **control measures** in the field.
3. Click **Submit**.

A dialog box appears stating “**All assigned members must acknowledge before submission.**”

4. Click **Review Acknowledgement**.

Figure 12-10 Review Acknowledgement



5. Change your status from **In Progress** to **Completed**.

Figure 12-11 Change JHA Status

The screenshot displays a mobile application interface for 'Work Acknowledgement'. At the top, there is a header bar with a purple 'X Cancel' button and the title 'Work Acknowledgement'. Below the header, a button labeled 'Mark all as completed' is visible. The main content area shows a user profile for 'Prathima D' with a status dropdown menu currently set to 'In Progress'. Below this is a 'Comment' section with a text input field containing the placeholder text 'Enter'. At the bottom of the screen, there is a white bar with two status options: 'In Progress' and 'Complete', separated by a horizontal line. The 'Complete' option is currently selected.

6. Add comments if required, and click **Confirm**.

Figure 12-12 Confirm Acknowledgement

Figure 12-12 shows the 'Work Acknowledgement' dialog box. The dialog has a title bar with a close button and the text 'Work Acknowledgement'. Below the title bar is a button labeled 'Mark all as completed'. The main area contains a user selection dropdown showing 'Prathima D' and a status dropdown showing 'Complete'. Below these is a 'Comment' section with a text area containing the word 'Completed'. At the bottom is a large blue button labeled 'Confirm'.

7. After all assigned team members complete their acknowledgement, click **Submit** to proceed to the next stage.

### Result

The team member acknowledgement is recorded; the JHA can proceed after all required members complete acknowledgement.

### Next action

**Next:** After all required acknowledgements, the JHA Owner or Approver reviews the JHA. (on page 93)

## 1.7. Approve or Revert JHA

Once all assigned team members complete field validation and Work Acknowledgement, the JHA moves to the Approve stage.

Role: JHA Owner. Platform: Web.

To approve or revert a JHA:

1. Navigate to **EHS** → **JHA** from the left navigation panel.
2. Go to the **Pending Approval** tab and select the JHA that needs to be reviewed.
3. In this stage, the approver can perform the following actions:
  - a. **Approve** – Approve the JHA if all hazards, control measures, and risk assessments are reviewed and acceptable.
  - b. **Reject** – Reject the JHA if it is not valid or no longer required.
  - c. **Revert** – Revert the JHA to the requester if any changes or additional information are required.

Figure 12-13 Approve JHA

The screenshot shows the 'Approve JHA' interface for a JHA titled 'Fix Motherboard Overheating - 2B2 JHA'. The interface includes a progress bar at the top with steps: Initiate (checked), Assign (checked), In Progress (checked), and Approve (active). Below the progress bar, there's a table with two steps. Each step has fields for 'Enter text', 'Potential Hazards' (with a 'Select option' dropdown), 'Control Measures' (with a 'Select option' dropdown), and 'Risk Assessment' (with a 'Select option' dropdown). There are also sections for 'Attachments' and 'Notes'. On the right side, there's a dropdown menu with options: 'Approve', 'Reject JHA', and 'Revert JHA'.

The JHA is approved, and now the linked permit can proceed to the next stage.

### Result

The JHA is approved, reverted for correction, or rejected according to the selected action.

### Next action

**Next:** After approval, return to the linked permit or work activity. (on page 62)

## 1.8. Approve JHA

After field acknowledgement, approve the JHA, return it for correction, or reject it when the supported conditions apply.

Role: JHA Owner. Platform: Mobile.

To approve a JHA:

1. Go to the All JHA or Pending Approval tab.
2. Select the JHA that needs to be approved.
3. Click Take Action.
4. Perform one of the following actions:
  - a. **Approve** – Approve the JHA if all details are valid.
  - b. **Revert** – Send the JHA back to the requestor for required changes.
  - c. **Reject** – Reject the JHA if it is no longer required.
5. Based on the selected action:
  - a. If you click **Approve**, add Signature and Comments, then click **Submit**.
  - b. If you click **Revert**, provide valid Comments for reverting the JHA and click **Submit**.
  - c. If you click **Reject**, provide valid Comments for rejecting the JHA and click **Submit**.

Figure 12-14 Approve JHA

←

> Electric pump 001 JHA  
SA-1000-JHA-000033

Steps Collapse All

Step 8/18

Basic Step

Isolate relevant circuit breaker from the Main control unit \*

11

This field is required

Potential Hazards

Approve

Revert

Reject

**Result**

The JHA is approved, reverted for correction, or rejected according to the selected action.

**Next action**

**Next:** After approval, return to the linked permit or work activity. *(on page 62)*

# VI. Part VI: Monitor and Audit

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# 1. Track Permit Expiry and Compliance

---

Identify permits nearing expiry, request or review extensions, and stop work when validity cannot be maintained.

## Choose a Monitoring or Audit Task

- **Expiry risk:** Request or review an extension.
- **Audit question:** Review permit history, PPE activity, or atmospheric logs.
- **Closed or rejected record:** Open the archive.
- **Low connectivity:** Prepare and synchronize supported permit activity.
- **Unavailable action:** Use permit-execution troubleshooting.

After reviewing or correcting the record, return to the permit list, dashboard, or active permit.

Permit Expiry Reports provide a consolidated view of permits that have expired or are nearing expiry across shifts and plants. This helps supervisors track permit status and identify records that require timely follow-up without opening each permit.

## What You Can Do from This Screen

The **Permit Expiry Reports** screen displays permit status grouped by shift and plant, with counts for expired and expiring permits. You can:

- View permits that have already expired.
- Track permits that are live and nearing expiry.
- Monitor permit status by shift.
- Filter reports by plant and time range.
- Review summary-level information without opening each permit.
- Share the report with stakeholders, for example, by email.

## Filters and Controls

- **Plant:** Select a plant to view permit expiry status for a specific location.
- **Time Range:** Select **Last 24 Hours**, **Last Week**, or a **Custom** date range.
- **Search:** Search for specific shifts or entries.
- **Sorting:** Sort by **Shift**, **Plant**, **Expired** count, or **Live (Expiring Soon)**.

Figure 13-1 Permit Expiry Reports

Permit Expiry Reports

1000 - Hamburg

Last 24 Hours

Last Week

Custom

Search

| <input type="checkbox"/> | Shift ID                                    | Plant ID | Expired % | Live (Expiring soon) % | Actions |
|--------------------------|---------------------------------------------|----------|-----------|------------------------|---------|
| <input type="checkbox"/> | Mar 14, 2026 / Test Shift2<br>10:00 - 23:59 | Hamburg  | 1         | 0                      | ...     |
| <input type="checkbox"/> | Mar 14, 2026 / Test Shift2<br>10:00 - 23:59 | Hamburg  | 1         | 0                      | ...     |
| <input type="checkbox"/> | Mar 13, 2026 / Test Shift1<br>08:00 - 15:59 | Hamburg  | 1         | 0                      | ...     |
| <input type="checkbox"/> | Mar 13, 2026 / Test Shift1<br>08:00 - 15:59 | Hamburg  | 1         | 0                      | ...     |
| <input type="checkbox"/> | Mar 13, 2026 / Test Shift2<br>16:00 - 23:59 | Hamburg  | 2         | 0                      | ...     |

# 1.1. Request a Permit Extension

Request additional permit validity before an active permit expires.

Role: Permit Requester or Permit Holder with extension permission. Platform: Web or iMaintenance Mobile.

The extension action appears only when the permit status and role allow it.

1. Open the near-expiry alert or the active permit.
2. Select the available extension-request action.
3. Enter the requested validity end date and time.
4. Provide the reason for the extension and any required updated conditions or evidence.
5. Submit the request.
6. Continue work only while the permit remains valid and according to the site process.

Result

The extension request is sent to the responsible reviewer or issuer and is recorded in Permit History.

Next action

**Next:** Return to the permit list, dashboard, or active record after completing this task. (on page 98)

# 1.2. Review a Permit Extension Request

Approve or reject a request to extend permit validity after reviewing current conditions.

Role: Permit Authorizer or Issuer with extension permission. Platform: Web or Mobile.

1. Open the pending extension request.
2. Review the current and requested validity, reason, work status, JHA, site conditions, isolations, atmospheric evidence, and conflicting work.
3. Approve the request and confirm the revised validity when continued work is acceptable.
4. Alternatively, reject the request and enter a clear reason.
5. Notify the Permit Holder of the decision.

**Result**

The decision and validity change are retained in Permit History.

**Next action**

**Next:** [Return to the permit list, dashboard, or active record after completing this task. \(on page 98\)](#)

## 1.3. Review Permit History

---

Review lifecycle actions and retained safety evidence for a permit.

Role: Authorized supervisor, Permit Issuer, reviewer, or auditor. Platform: iCWP Web.

Permit History can include review, authorization, issue, hold, resume, acknowledgement, extension, surrender, and closure actions, together with the user, date/time, comments, and signatures.

Use the related history links to review PPE activity, atmospheric logs, forms, attachments, and other retained evidence.

- [Review PPE Activity \(on page 100\)](#)
- [Review Atmospheric Logs from Permit History \(on page 101\)](#)

**Next:** [Return to the permit list, dashboard, or active record after completing this task. \(on page 98\)](#)

## 1.4. Review PPE Activity

---

Review PPE verification, skipped verification, and photo evidence recorded during mobile permit execution.

Role: Authorized supervisor, Permit Issuer, reviewer, or auditor. Platform: iCWP Web.

1. Open the permit on Web.
2. Open **Permit History**.
3. Locate the PPE activity event.
4. Review whether PPE was verified or recorded as not applicable by the configured workflow.
5. Review the user, date/time, comments, and captured photos.

#### Result

The PPE compliance activity remains available with the permit record for review and audit.

#### Next action

**Next:** Return to the permit list, dashboard, or active record after completing this task. *(on page 98)*

## 1.5. Review Atmospheric Logs from Permit History

---

Open mobile atmospheric readings and trend information from the Web permit record.

Role: Authorized supervisor, Permit Issuer, reviewer, or auditor. Platform: iCWP Web.

1. Open the permit and select **Permit History**.
2. Locate the atmospheric-log history event.
3. Select **View Atmospheric Log**.
4. Review the readings, timestamps, users, statuses, and trend information in the read-only view.
5. Review missed or out-of-range events and the related follow-up actions.

#### Result

The submitted atmospheric evidence remains available after the related operation is closed and after refresh or synchronization.

Next action

**Next:** Return to the permit list, dashboard, or active record after completing this task. *(on page 98)*

# 1.6. Access Archived Permit and JHA Records

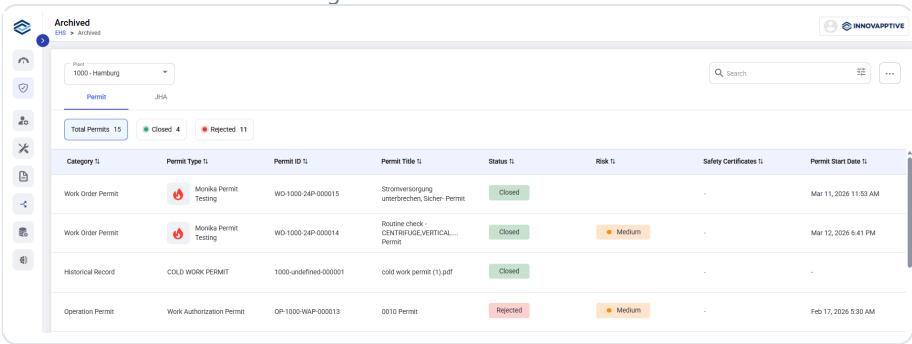
Find closed or rejected records and review the retained lifecycle and safety evidence.

The **Archived** module contains Permits and JHAs that are no longer active. It is intended for audit, compliance, and reference. Active or in-progress records are not shown.

The **Permits** tab displays archived permits in **Closed** or **Rejected** status. The list includes:

- Permit ID and Title
- Permit Type and Category
- Status (Closed/Rejected)
- Risk Level
- Safety Certificates
- Permit Start Date
- Related Equipment and Work Order details, when applicable

Figure 13-2 Archived - Permit



| Category %        | Permit Type %             | Permit ID %           | Permit Title %                                | Status % | Risk % | Safety Certificates % | Permit Start Date %   |
|-------------------|---------------------------|-----------------------|-----------------------------------------------|----------|--------|-----------------------|-----------------------|
| Work Order Permit | Monika Permit Testing     | WO-1000-24P-000015    | Stromversorgung unterbrechen, Sicher- Permit  | Closed   |        | -                     | Mar 11, 2026 11:53 AM |
| Work Order Permit | Monika Permit Testing     | WO-1000-24P-000014    | Routine check - CENTRIFUGE/VERTICAL... Permit | Closed   | Medium | -                     | Mar 12, 2026 6:41 PM  |
| Historical Record | COLD WORK PERMIT          | 1000-undefined-000001 | cold work permit (1).pdf                      | Closed   |        | -                     | -                     |
| Operation Permit  | Work Authorization Permit | OP-1000-WAP-000013    | 0010 Permit                                   | Rejected | Medium | -                     | Feb 17, 2026 9:30 AM  |

The **JHA** tab displays archived JHAs in **Closed** or **Rejected** status. The list includes:

- JHA ID and Title
- Status (Closed/Rejected)
- Linked Permit, when applicable
- Work Order ID
- Operation Details
- Equipment ID

Figure 13-3 Archived - JHA

| JHA ID %           | JHA Title %                           | Status % | Permit %                                 | Work Order ID % | Operation Details %                                       | Equipment ID % |
|--------------------|---------------------------------------|----------|------------------------------------------|-----------------|-----------------------------------------------------------|----------------|
| WO-1000-JHA-000340 | This is Short JHA                     | Closed   | This is Short Permit                     | 833620          | 0010 - This is Short                                      | E9745964       |
| WO-1000-JHA-000340 | broken valve JHA                      | Closed   | broken valve Permit                      | 833640          | 0010 - broken valve<br>+ 6 more                           | 10008895       |
| WO-1000-JHA-000304 | broken valve JHA                      | Rejected | broken valve Permit                      | 833640          | 0010 - broken valve<br>+ 6 more                           | 10008895       |
| WO-1000-JHA-000307 | Routine check - CENTRIFUGE,VERTIC JHA | Closed   | Routine check - CENTRIFUGE,VERTIC Permit | 833613          | 0010 - Routine check - CENTRIFUGE,VERTICAL...<br>+ 1 more | 10000958       |

1. Open the **Archived** module.
2. Select the **Permits** or **JHA** tab.
3. Select the required plant.
4. Search, filter, or sort the records to locate the archived entry.
5. Review the past safety decision for audit, inspection, compliance, or reference.

### Result

The selected closed or rejected Permit or JHA record is available for review.

### Next action

**Next:** Return to the permit list, dashboard, or active record after completing this task. (on page 98)

## 1.7. Work Offline and Synchronize Permit Activity

Prepare permit data for offline work and synchronize supported mobile actions after connectivity returns.

Role: Mobile permit or JHA user. Platform: iMaintenance Mobile.

Supported offline actions and downloaded records depend on configuration. AI recommendations and other online services may be unavailable offline.

1. Synchronize iMaintenance before entering a low-connectivity area.
2. Confirm that the required work order, permit, JHA, forms, instructions, and attachments are available.
3. Complete the supported permit or JHA actions while offline.

4. Review locally pending records in the applicable Outbox or synchronization view.
5. Restore connectivity and run synchronization.
6. Review failed records and correct the underlying validation, permission, or data issue before retrying.

**Result**

Supported offline activity is sent after connectivity is restored while preserving the recorded sequence. Unresolved failures remain visible for correction.

For general mobile synchronization guidance, see [Work Offline and Synchronize Data](#) (on page 98).

**Next action**

**Next:** [Return to the permit list, dashboard, or active record after completing this task.](#) (on page 98)

## 1.8. Troubleshoot Permit Execution

Check common causes when a permit action or record is unavailable.

| Problem                            | Check                                                                                                        |
|------------------------------------|--------------------------------------------------------------------------------------------------------------|
| Action is not displayed            | Role permission, permit status, plant access, and whether the action applies to the selected permit          |
| Work order or operation is missing | Plant, work center, date filters, operation status, and synchronization range                                |
| Cannot acknowledge or start        | Permit issue status, JHA approval, mandatory questions, PPE, field validation, validity, and required forms  |
| Cannot surrender or close          | Open work, pending forms, incomplete checks, active personnel, permit validity, and synchronization failures |
| QR scan does not open the permit   | Camera permission, QR permission, plant access, connectivity, and permit status                              |
| Offline change did not synchronize | Outbox status, network, required fields, permission, and server validation message                           |

**Next:** [Return to the permit list, dashboard, or active record after completing this task.](#) (on page 98)

## **VII. Part VII: Design and Configure (Administrator / Template Author)**

---

# 1. Design and Manage Permit Templates

---

Define reusable permit sections, fields, response types, and list settings before requesters raise permits from the template.

**Role:** iPermits Administrator or Template Author. **Platform:** iCWP Web.

Permit templates define the reusable sections, fields, response types, and validation structure used when requesters raise permits.

1. Understand the response types and the out-of-the-box sections and fields.
2. Create, review, and publish the permit template.
3. Configure the Permit list columns users need.
4. Return to Authoring and verify the published template is available for permit creation.

## 1.1. Understand Permit Template Response Types

---

Choose the correct response type — Text, Number, Date & Time, Search Text, Attachments, Multiple Choice, or Form — for each field in a permit template.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

Use sections, fields, response types, and conditional logic together when building a permit template:

### Sections

Add sections to group relevant tasks together.

### Fields

Add tasks with logical questions under each section with different response types along with required conditional logic.

### Standard Response Types

Standard response types are predefined formats that help capture relevant data consistently and efficiently during maintenance tasks. Standard Response Types are categorized into Responses and Picklist.

The application supports the following Standard Response Types:

| Re-<br>sponse<br>Type | Description                                                                                                                         | Supported Properties                                                                                                                       |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Text                  | Free text input (e.g., title, descriptions).                                                                                        | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Type                                                         |
| Number                | Numeric values field                                                                                                                | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Unit, History, Range, Formula, and Unit of Measurement (UoM) |
| Date & Time           | Calendar input for date & time values.                                                                                              | Additional Details, Localization, Enable, Required, Date & Time Format                                                                     |
| Search Text           | Searchable text field for selecting values from Drop-down.                                                                          | Add Logic, Input Data, Localization, Enable, Required                                                                                      |
| Attachments           | Uploads documents or files (PDFs, DOCs, Voice, Image, etc.).                                                                        | Additional Details, Localization, Enable, Required, Attachment Details                                                                     |
| Multiple choice       | Allows the user to select one or more values from a predefined list.                                                                | Add Logic, Additional Details                                                                                                              |
| Form                  | Links another form as a question inside the permit, shown as Single Instance (one entry) or Multiple Instance (more than one entry) | Add Logic, Additional Details, Localization, Enable, Required, plus Instance Type (noted as read-only, inherited from the form)            |

**Table 14-1 Field Configuration Options**

| Property/Attribute | Description                                                                                                                       |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Ask Question       | Allows you to add sub questions based on the condition.                                                                           |
| Logic              | Enables conditional rules for a field (show/hide Field/Section, Raise Issue, Mandatory field/Section etc.) based on field values. |
| Default Value      | Pre-fills the field with a value when the form loads in mobile application.                                                       |
| Format             | Allows you to display the text in short text or paragraph.                                                                        |
| Additional Details | Allows you to define character limit or extra metadata for users.                                                                 |
| Localization       | Allows you to translate field labels into multiple languages.                                                                     |
| Output Data        | Maps a response to the selected permit or integration output, such as Work Center, Name, or Permit ID.                            |
| Enable             | Controls whether the field is available during permit creation or execution.                                                      |

**Table 14-1 Field Configuration Options (continued)**

|          |                                                                                      |
|----------|--------------------------------------------------------------------------------------|
| Required | Marks the field as mandatory for submission.                                         |
| Icon     | Allows you to display the icon for the field or question.                            |
| Unit     | Allows admins to select a unit of measurement (e.g., °C, Kg, hrs) to numeric fields. |
| History  | Stores previous values entered for the field when history is enabled.                |
| Range    | Sets a minimum and maximum limit for values (typically in number or slider).         |
| Date     | Allows you to display the date.                                                      |
| Time     | Allows you to display the time.                                                      |
| Add Link | Allows the field to point to an external URL or system reference.                    |

**Next:** Use the selected response types when creating the permit template. (on page 110)

## 1.2. Understand Standard Permit Template Sections and Fields

Every new permit template automatically includes an EHS Details section and a Basic Permit Details section.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

When a new Permit Template is created, the system automatically adds the following default sections:

- EHS Details
- Basic Permit Details

### EHS Details

The EHS Details section captures Environment, Health, and Safety (EHS) related information required before permit execution. This section is commonly used to configure safety acknowledgements, hazard-related questions, and additional safety requirements.

#### Output Data Mapping:

For the configured questions and fields, ensure the corresponding **Output Data** values are mapped as shown in the table below:

| Question | Output Data | Response Type |
|----------|-------------|---------------|
|----------|-------------|---------------|

|                                                               |                                  |                                     |
|---------------------------------------------------------------|----------------------------------|-------------------------------------|
| Are there any additional safety forms required for this task? | Additional Safety Forms Required | Picklist (Multiple Choice - Yes/No) |
| Select applicable additional safety forms                     | Safety Certificate               | Picklist (Multiple Choice - Yes/No) |

### Figure 14-1 EHS Details

The screenshot displays the 'EHS Details' configuration window. At the top, a blue header bar contains the title 'EHS Details' and a count '2'. Below the header, a logic rule is defined with the question 'Are there any additional safety forms required for this task?'. The rule has a 'YES' outcome with a count of '+1'. The rule is currently set to 'Enable'. Below the rule, a logic flow is shown: 'is not YES' leads to a condition 'If answer is not YES then Ask Question (1)'. This condition is linked to a sub-configuration window titled 'Select applicable additional safety forms'. This sub-window shows a dropdown menu set to 'Safety Certificate' and a list of options: 'Ask Question', 'Logic', 'Output Data : Safety Certificate', 'Enable', 'Required', 'Icon', and 'Allow Multi-Select'. The 'Output Data : Safety Certificate' option is selected, and the 'Allow Multi-Select' checkbox is checked.

## Basic Permit Details

The Basic Permit Details section captures core permit execution information required for permit validity, risk tracking, and workforce details.

| Field                | Description                                                             | Response Type                       |
|----------------------|-------------------------------------------------------------------------|-------------------------------------|
| Permit Validity From | Specifies the start date and time from which the permit becomes active. | Date & Time                         |
| Permit Validity To   | Specifies the end date and time until which the permit remains valid.   | Date & Time                         |
| Risk                 | Defines the risk category associated with the permit activity.          | Picklist (Multiple Choice - Yes/No) |

|              |                                                                    |             |
|--------------|--------------------------------------------------------------------|-------------|
| Crew Members | Captures the personnel involved in the permit activity.            | Search Text |
| PPE          | Specifies the Personal Protective Equipment required for the task. | PPE         |

## Output Data Mapping

For the configured fields in the Basic Permit Details section, ensure the corresponding Output Data values are mapped as shown in the table below:

| Question             | Output Data   |
|----------------------|---------------|
| Permit Validity From | Valid from    |
| Permit Validity To   | Valid to      |
| Risk                 | Risk          |
| Crew Members         | Assigned Crew |
| PPE                  | PPE           |

Figure 14-2 Basic Permit Details

The screenshot displays the 'Basic Permit Details' configuration screen. It features a list of fields with their corresponding output data types. The 'Risk' field is highlighted, showing a 'High' risk level. The toolbar at the bottom includes options for asking questions, logic, additional details, localization, output data (currently set to 'Risk'), enabling, requiring, and adding icons.

**Next:** [create or update the permit template. \(on page 110\)](#)

## 1.3. Create Permit Template

Configure and define the permit template with sections and required fields based on specific business use cases and plant requirements.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

### Create Permit Template – Manually

To create a permit template:

1. Expand the **EHS** module and click **Authoring**.

The **Permits** tab is displayed with a list of permit templates.

2. Click the **Create Manually** button on top right.

3. In the Template Details screen, provide the following information:

| Field                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Template Name        | <ul style="list-style-type: none"><li>◦ Click the Hamburger icon to select the Permit Type (For example, Hot Work, Mechanical, Work on Height, Confined Space, Radiation, Lifting, Electrical, and so on).</li><li>◦ Select an appropriate icon to visually represent the permit type (for example, a red flame icon for Hot Work permits and a confined space icon for Confined Space permits).</li><li>◦ Enter a unique name in the text box for the permit template (e.g., Mechanical Work Permit).</li></ul> |
| Template Code        | Provide the required template code with 2 characters (letters/numbers).                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Template Description | Describe the purpose of the template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Plant                | Select the applicable plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Tags                 | Add tags to categorize the template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Acknowledgement Form | Select the required form applicable to the selected plant. <div> <b>Note:</b><br/>Select the Acknowledgement Form for permit types that require Technicians/Contractor's acknowledgement before work execution (for example, Confined Space or Hot Work permits).</div>                                                                                                                                                       |
| Additional Forms     | Select the required additional forms from the drop-down. <ul style="list-style-type: none"><li>◦ <b>Contractor Form:</b> Select to associate the required Contractor Forms with the Permit Template.</li><li>◦ <b>Atmospheric Log:</b> Select this option to enable the <b>Field Validation</b> stage during permit raise.</li></ul>                                                                                                                                                                             |

4. Click **Next**.

Figure 14-3 Permit Template Details

1 Template Details

2 Template Configuration

3 PDF Setup

Cancel

Next

Template Name

Hot permit

Template Code

H

Ø

P

Code is available

Template Description

Enter Text

Plant

1000 - Hamburg

Tags

Start typing to see tags

Acknowledgement Form

Permit Acknowledgement Form

## 5. In the Template Configuration screen:

- a. Add the required Sections within each page based on the Permit Template requirements (for example, EHS Details, Basic Permit Details).



### Note:

Default sections with fields are auto populated to help you get started. You can modify them or add new sections as required.

- b. Insert Fields (Questions) into sections.
- c. Select Response Type (Text, Number, Slider, Multiple Choice, etc.).
- d. Add required properties.
- e. In this screen, you can:
  - Use the **Import** button to import sections and fields from an existing template.
  - Rename, reorder, copy, or delete fields and change response types as needed.
  - Rename, reorder, duplicate, or delete sections to match your workflow.
  - Set view, edit, or hide permissions for a section.
    - Select the Role, then select **Edit** if the role should be able to view and modify the Field/Section.
    - Select the Role, then select **View** if the role should only be able to see the Field/Section without editing.
    - Select the Role, then select **Hide** if the role should not see the Field/Section.
    - Click + **Add Role** to configure permissions for additional roles on the same section

## 6. You can reuse sections and questions from existing Published or Draft permit templates to avoid rework and maintain consistency.

- Click **Import** and select the permit template required from the list.
- Click **Use** to import the selected content into the current permit template.

- Click **Preview** to see how the template appears in both web and tab applications.
- Click **Next**.

Figure 14-4 Permit Template Configuration

Back to List

Template Details

Template Configuration

PDF Setup

Hot permit

Preview

Next

Questions

Page

4

EHS Details

Are there any additional safety forms required for this task?

YES +1

Ask Question

Logic

Additional Details

Localisation

Output Data

Others

Enable

Required

Icon

Key Name : IsAdditionalSafetyFormsRequired

Add Field

Basic Permit Details

EHS Details

Basic Permit Details

Add Section

Import

23:47

Home

EHS Details

Are there any additional safety forms required for this task?

YES

NO

Basic Permit Details

EHS Details

Basic Permit Details

- In the **PDF Setup** screen, click **Publish**.



**Note:**

You can configure the PDF on the left side pane to customize what information should appear in the PDF such as Logo, Header, Footer, Body Content, etc.

Figure 14-5 PDF Setup

Back to List

Template Details

Template Configuration

PDF Setup

Cold Permit

Publish

Configuration

Select All

Summary Page

Logo

QR

Footer

Custom Text

Label

Field

Body Content

EHS Details

PDF setup and preview

Permit Title

Permit ID (Placeholder)

Safety Doc (Placeholder)

QR Code Comes Here

| Permit Type | Activity | Description | Risk |
|-------------|----------|-------------|------|
|             |          |             |      |

| Requester | Reviewer | Approver | Issuer |
|-----------|----------|----------|--------|
|           |          |          |        |

Location Details

| Plant / Unit | F.Loc | Equipment |
|--------------|-------|-----------|
|              |       |           |

Permit Validity

| From | To | Total Duration |
|------|----|----------------|
|      |    |                |

**Result**

The permit template is saved or published and is available for testing according to its status.

### Next action

**Next:** Configure the list view when users need different record columns. *(on page 115)*

## 1.4. Configure Permit List View

---

Select the columns users need when reviewing permit records in the list.

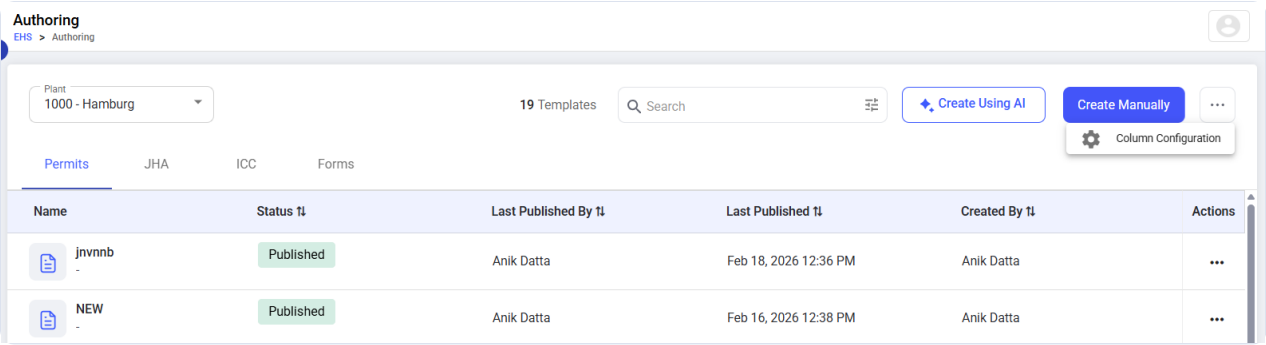
Role: iPermits Administrator or Template Author. Platform: iCWP Web.

To configure the view:

1. Navigate to **EHS** → **Authoring** from the left navigation panel.
2. Go to the **Permit** tab.
3. Click the **More** options (⋮) icon next to Create Manually.

4. Select **Column Configuration**.

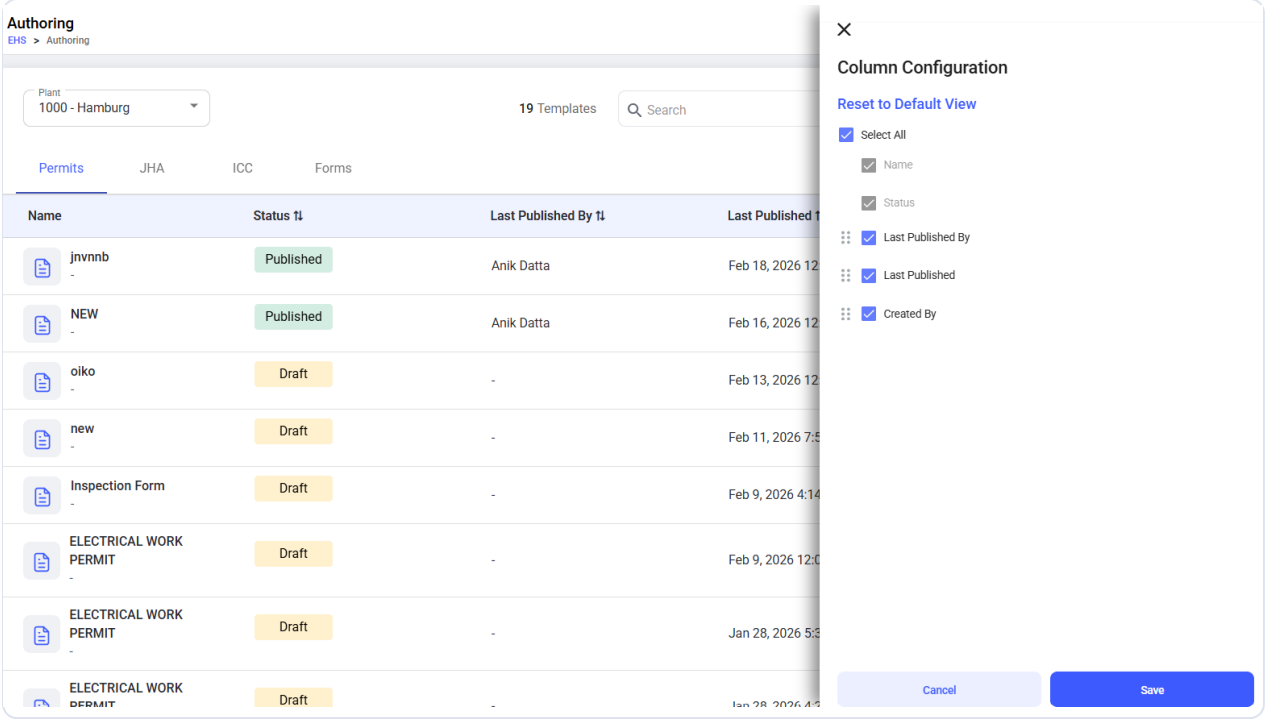
Figure 14-6 Configure Permit List



5. Select or clear the columns you want to display (for example, Name, Status, Last Published By, Last Published, Created By).

6. Click **Save** to apply the changes.

Figure 14-7 Column Configuration



**Result**

The Permit list displays the configured columns and order for authorized users.

**Next action**

**Next:** Return to Authoring and verify the published permit template is available. (on page 106)

# 2. Design and Manage JHA Templates

Define reusable job-step, hazard, control, and list settings before users create JHAs from the template.

**Role:** iPermits Administrator or Template Author. **Platform:** iCWP Web.

JHA templates define reusable job steps, hazards, controls, and output settings for Job Hazard Analyses.

- 1. Create, review, and publish the JHA template.
- 2. Configure the JHA list columns users need.
- 3. Return to Authoring and verify the published template is available for JHA creation.

## 2.1. Create JHA Template

Create a JHA template with the required job-step, hazard, control, and output configuration.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

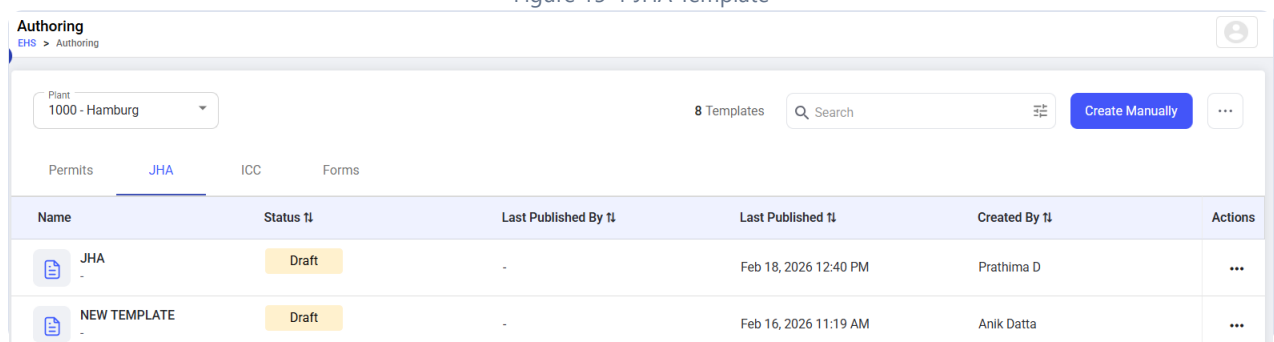
Create JHA Template:

- 1. Expand the **EHS module** and click **Authoring**.
- 2. Go to the **JHA tab**.

The JHA tab is displayed with a list of JHA templates.

- 3. Click the **Create Manually** button at the top right.

Figure 15-1 JHA Template



| Authoring               |        |                   |                       |            |                 |
|-------------------------|--------|-------------------|-----------------------|------------|-----------------|
| EHS > Authoring         |        |                   |                       |            |                 |
| Plant<br>1000 - Hamburg |        | 8 Templates       |                       | Search     | Create Manually |
| Permits                 | JHA    | ICC               | Forms                 |            |                 |
| Name                    | Status | Last Published By | Last Published        | Created By | Actions         |
| JHA                     | Draft  | -                 | Feb 18, 2026 12:40 PM | Prathima D | ...             |
| NEW TEMPLATE            | Draft  | -                 | Feb 16, 2026 11:19 AM | Anik Datta | ...             |

4. In the Template Details screen, provide the following information:

| Field                     | Description                                                                                                               |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------|
| Template Name             | Enter a unique name for the JHA template                                                                                  |
| Template De-<br>scription | Describe the purpose of the JHA template.                                                                                 |
| Plant                     | Select the applicable plant.                                                                                              |
| Tags                      | Add tags to categorize the JHA template for easy search and filtering.                                                    |
| JHA Questions             | Select or configure the standard JHA questions to be included in this template.                                           |
| Additional<br>Forms       | Select any additional forms (for example, inspection or acknowledgement forms) that must be completed along with the JHA. |

5. Click **Next**.

Figure 15-2 JHA Template Details

The screenshot shows the 'JHA Template Details' screen with a progress bar at the top indicating three steps: 1. Template Details (active), 2. Template Configuration, and 3. PDF Setup. In the top right corner, there are 'Cancel' and 'Next' buttons. The main content area contains several input fields:

- Template Name:** A text input field containing 'JHA'.
- Template Description:** A large text area with the placeholder 'Enter Text'.
- Plant:** A dropdown menu showing '1000 - Hamburg'.
- Tags:** A text input field with the placeholder 'Start typing to see tags'.
- JHA Questions:** A dropdown menu showing 'NEW TEST FORM'.

## 6. In the Template Configuration screen:

- Define the job steps in the JHA table.
- Configure sections such as Potential Hazards, Control Measures, and Risk Assessment.
- Add fields (questions) within each section as required.
- Select appropriate response types (Text, Number, Multiple Choice, Pick List, etc.).
- (Optional) Configure Equipment, Training, and Inspection sections to capture surrounding or related risks.
- (Optional) Configure Attachments and Notes for each step to allow field users to add photos and observations.
- Click **Preview** to see how the JHA template appears in both web and mobile applications.
- Click **Next**.

Figure 15-3 JHA Template Configuration

The screenshot shows the 'Template Configuration' step in a three-step process (Template Details, Template Configuration, PDF Setup). The 'JHA' section is expanded, showing two main configuration areas: 'JHA Details' and 'Work Order Details'. Each area contains several fields, all of which are currently set to 'Configured'. The 'JHA Details' section includes fields for JHA ID, JHA Owner, JHA Requester, JHA Requested on, and JHA Completed on. The 'Work Order Details' section includes fields for Location, Equipment, Work Order, Operations, Permit Type, Permit ID, and Define Activity. Each field has a small 'x' icon to its right, likely for editing or deleting the field. At the bottom of each section is a '+ Add Field' button. On the right side of the screen, there are 'Preview' and 'Next' buttons, and a 'Work Acknowledgment' indicator showing '0/0'.

## i. Configure Fields within a Section:

- Click the pencil (edit) icon in the respective column to configure fields.
- Add new fields or edit existing fields.
- Select the appropriate Response Type, such as: Text, Number, Pick List (Single Select or Multi-Select).

Figure 15-4 JHA Template Field Configuration

This screenshot shows the 'Configure' screen for a specific section, 'Potential Hazards'. The left pane shows the overall JHA template configuration, including the 'JHA Details' and 'Work Order Details' sections. The right pane is titled 'Configure' and shows the 'Potential Hazards' section. It contains a list of fields: 'apture 1', 'apture 2', and 'Enter field name'. Each field has a response type dropdown menu, currently set to 'Text'. Below the list of fields is a configuration panel with options for 'Ask Question', 'Logic', 'Default Value', 'Format' (set to 'Short Text'), 'Additional Details', 'Localisation', 'Output Data' (checked), 'Enable' (checked), 'Required' (unchecked), 'Icon' (unchecked), and 'Key Name'. At the bottom of the configuration panel is a '+ Add Field' button.

7. In the PDF Setup screen, configure the PDF layout as required.

8. Click **Publish**.



**Note:**

You can configure the PDF from the left pane to control what information appears in the exported document, such as Logo, QR code, Header, Footer, and Body Content.

**Result**

The JHA template is saved or published according to the selected action.

**Next action**

**Next:** Configure the JHA list view when users need different record columns. *(on page 120)*

## 2.2. Configure JHA List View

Select the columns users need when reviewing JHA records in the list.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

To configure the view:

1. Navigate to **EHS** → **Authoring** from the left navigation panel.
2. Go to the **JHA** tab.
3. Click the **More** options (⋮) icon next to Create Manually.
4. Select **Column Configuration**.
5. Select or clear the columns you want to display (for example, Name, Status, Last Published By, Last Published, Created By).
6. Click **Save** to apply the changes.

You can click Reset to Default View at any time to restore the default column layout.

**Result**

The JHA list displays the configured columns and order for authorized users.

### Next action

**Next:** [Return to Authoring and verify the published JHA template is available. \(on page 117\)](#)

## 3. Design and Publish Forms

---

Build and publish forms that capture the configured permit checks during execution.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

Forms are configurable, reusable checklists (acknowledgements and inspection forms) that can be embedded into permits and JHAs to enforce mandatory safety and compliance checks before work proceeds. Administrators can create Forms either manually or using AI by converting existing documents into digital forms. Once published, Forms can be attached to relevant workflows to ensure consistent data capture, validation, and audit readiness across plants.

To create a form:

1. Expand the **EHS module** and click **Authoring**.
2. Go to the **Forms** tab.

The Forms tab is displayed with a list of Form templates

3. Click the **Create Manually** button at the top right (or click Create Using AI, if you want to generate a Form from an existing document).
4. Create **Form Template Manually**.

## 5. In the Template Details screen, provide the following information:

| Field                  | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tem-plate Name         | Enter a unique name for the Form template                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Tem-plate Descrip-tion | Describe the purpose of the Form template.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Plant                  | Select the applicable plant.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Type                   | Select the Form type (for example, Acknowledgement, Audit, Checklist, JHA Questions, Atmospheric Logs, Zero Energy Test).                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Instance Type          | Defines how many times the form can be submitted when it is linked to a Permit or JHA. Select one of the following: <ul style="list-style-type: none"><li>◦ <b>Single Instance</b> - Only one submission of the form is allowed per permit/JHA. For example, a Signature Form or a one-time safety acknowledgement</li><li>◦ <b>Multiple Instance</b> - Several independent entries of the form can be created and submitted. for example, a Data Copy form completed once per component, or a checklist repeated for each crew member.</li></ul> |

**About Form Types**

- **Acknowledgement** - Captures worker acknowledgement of permit conditions and safety instructions.
- **Audit** - Records inspection and compliance verification details.
- **Checklist** - Captures predefined safety or operational checks.
- **JHA Questions** - Captures hazard, risk, and control-related questions for JHA.
- **Atmospheric Logs** - Records environmental monitoring readings.
- **Zero Energy Test** - Captures equipment isolation and zero-energy verification details.
- **Contractor** - Captures contractor details and compliance information.

6. Click **Next**.

Figure 16-1 Create Forms Manually

Authoring

EHS > Authoring

Plant

1000 - Hamburg

11 Templates

Q

Search

Create Using AI

Create Manually

...

Permits

JHA

ICC

Forms

ELECTRICAL WORK

## 7. In the Template Configuration screen:

- Define the Form structure using Pages and Sections.
- Add fields (questions) within each section as required.
- Select appropriate response types (Text, Number, Yes/No, Pick List, Date, etc.).
- Mark fields as Required, if mandatory completion is needed.
- (Optional) Configure conditional logic to show or hide fields based on responses.
- (Optional) Configure Default Values, formatting, and localization for fields.

Each **Response Type** defines the field or input format used across the platform's authoring and execution modules

| Re-<br>sponse<br>Type | Description                                  | Supported Properties                                                                                                                       |
|-----------------------|----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Text                  | Free text input (e.g., title, descriptions). | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Type                                                         |
| Num-<br>ber           | Numeric values field                         | Add Logic, Default Value, Additional Details, Localization, Enable, Required, Unit, History, Range, Formula, and Unit of Measurement (UoM) |
| Date &<br>Time        | Calendar input for date & time values.       | Additional Details, Localization, Enable, Required, Date & Time Format                                                                     |
| Signa-<br>ture        | Captures digital signatures from users.      | Additional Details, Localization, Enable, Required                                                                                         |
| Hyper-<br>link        | Clickable link to web or document resources. | Additional Details, Localization, Enable, Required, Add Link                                                                               |
| Add<br>Photo          | Upload images for visual evidence.           | Additional Details, Localization, Enable, Required                                                                                         |

## Field Logic and Settings

- Set conditional logic (for example, show or hide fields or sections based on user responses), as described in the table below.
- Mark fields as Required, enable History, or apply Localization on business and compliance needs.

### Response Type Properties

|                    |                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Add Logic          | Enables conditional rules for a field (show/hide Field/Section, Raise Issue, Mandatory field/Section etc.) based on field values. |
| Default Value      | Pre-fills the field with a value when the form loads in mobile application.                                                       |
| Additional Details | Allows admin to define character limit or extra metadata for users.                                                               |
| Localization       | Allows admin to translate field labels into multiple languages.                                                                   |
| Enable             | Toggles whether the field is active and visible in the consumption.                                                               |
| Required           | Marks the field as mandatory for submission.                                                                                      |

8. Use **Preview** to see how the form appears in the mobile app.
9. Click **Next**.
10. In the PDF Setup screen, configure the PDF layout as required (Logo, QR code, footer text, body content visibility).
11. Click **Publish**.

#### Result

The form is published and available to be linked to the applicable permit or JHA template.

#### Next action

**Next:** Configure whether the form allows one or multiple entries when it is linked for permit use. (*on page 126*)

## 3.1. Configure Single- and Multiple-Instance Forms

Choose whether a linked permit form can be submitted once or can contain multiple independent entries.

Role: iPermits Administrator or Template Author. Platform: iCWP Web.

| Instance type     | Use when                                                                                       | Execution behavior                                                                                          |
|-------------------|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Single Instance   | One completed record is required for the permit                                                | One final submission; background autosave; Submit and Cancel actions                                        |
| Multiple Instance | The same form must be completed repeatedly for separate checks, personnel, readings, or events | Unlimited independent entries, each with Save, Submit, and Cancel actions and its own synchronization state |

After publishing, create a test permit and verify the form on Web and mobile, including validation, offline save, synchronization, PDF output, and the permitted number of entries.

**Next:** [Return to Authoring and verify the published form is available for linking.](#) (*on page 122*)