

iPermits User Guide

Connected Worker Solutions



Title and Copyright

Copyright and **Terms of Use** page for **iPermits**.

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

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Preface

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

To see where a permit is in its lifecycle and who acts next, see [Create and Manage Permits \(on page 19\)](#).

Role	Start with
Permit Requester	Choose the Type of Permit to Raise (on page 34)
Reviewer	Review and Revert a Permit (on page 51)
Authorizer	Authorize the Permit on Web (on page 54)
Field Validator	When Field Validation Is Required (on page 58)
Issuer	Issue the Permit on Web (on page 59) ; Close the Permit on Web (on page 84)
Permit Holder or Technician	Execute an Operation-Level Permit (on page 68)
JHA Requester or Owner	Create and Manage JHA (on page 88)
Administrator or Template Author	Design and Manage Permit Templates (on page 124)

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I. Part I: Understand iPermits

1. Introduction to iPermits

iPermits 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 2609

New Features and Enhancements in Release 2609

Table 1-1 New Features and Enhancements in Release 2609

Create and Configure ICC Templates Create ICC templates with the required isolation details and configuration to standardize isolation planning. For more information, see .
Manage Isolations End-to-End with the New ICC Module Control who can act at each stage, and move an isolation through raising, review, approval, de-isolation, and verification. For more information, see Create and Manage Isolations (on page 105).

Table 1-1 New Features and Enhancements in Release 2609 (continued)**Upload and Annotate Permit Plans on Mobile**

Upload an image or PDF of a Permit Plan from your device, or view one uploaded on Web, and add drawings, highlights, or other marks directly on Mobile.

For more information, see [Raise a Work-Order-Linked Permit on Mobile \(on page 38\)](#).

Review and Approve Permit Extension Requests from Mobile

Review and approve or reject permit extension requests from Mobile, with a color-coded indicator for permits nearing expiry or awaiting action.

For more information, see [Review a Permit Extension Request \(Mobile\) \(on page 117\)](#).

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	• Desktop • iOS - Tablets and Phones • Android - Tablets and Phones
Compatible Device(s)	• iOS 16 and above • iPad Air 2 and above • iPad 5th generation and above • iPad Mini 4 and above • All iPad Pro models • iPhone 10 and above and iPhone SE2 • Android 12 • Samsung, Google, One Plus, ECom, and iSafe devices that support Android 12 and above
Compatible Browser(s)	Chrome (Best view), Firefox, and Microsoft Edge

System	Minimum Requirement
Device Storage and Memory Requirements	Windows 8GB RAM and a 64-bit operating system with an x64-based processor are preferred. Macintosh 8GB RAM and a 64-bit operating system. Mobile • Android: 6GB RAM and above • iOS: 4GB RAM and above

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 (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	Platform
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

Isolation Lifecycle – Role vs Action Summary

JHA Stage	Action	Role	Platform
Template Setup	Author ICC Template	Admin	Web
Plan	Initiate JHA	ICC Owner	Web + Mobile
	Fill Initial ICC Details		
Approve Iso	Approve ICC	ICC Approver	Web + Mobile
Isolate	Perform Isolation	ICC Issuer / ICC Owner	Mobile
Review Isolation	Review Completed Isolation	ICC Reviewer	Web + Mobile
Live	Set ICC to Live	ICC Issuer / ICC Owner	Mobile
Approve De-Iso	Approve De-Isolation	ICC Approver	Web + Mobile
De- Isolation	Perform De-Isolation	ICC Owner	Mobile
Close	Close ICC	ICC Owner	Web + Mobile

2.2. What Your Administrator Controls

Some actions, tabs, and fields you see in iPermits depend on settings your administrator configures. If something described in this guide is missing, check these settings with your administrator.

Setting	What it changes for you	Where it is configured
Roles and permissions	Which permit and JHA actions you can see and perform. See Role-Based Permissions (on page 15) .	<i>Create Roles and Permissions</i>
Mobile bottom navigation	Which tabs (for example, Permits, JHA, Work Orders) appear in the mobile app for your persona.	<i>Configure Bottom Navigation (Mobile)</i>
AI features	Whether AI-based PPE recommendations and AI suggestions for permit setup are available for your plant.	<i>Configure AI</i>
Mobile data sync preferences	Which work orders and issues synchronize to your device, and for how many days, based on your role.	<i>Define Mobile Data Sync Preferences</i>
Session timeout	How long your session stays active while you are inactive before you return to the login screen.	<i>Configure Session Timeout</i>
Notifications	Which workflow events notify you, and when.	<i>Set Up Notifications</i>
Permit, JHA, Isolation and Form templates	The sections and fields you complete, which fields your role can edit, view, or not see, whether field validation applies, and which forms are attached.	Design and Manage Permit Templates (on page 124) in this guide

Settings in the third column, other than template design, are described in the *iPermits Configuration Guide*.

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 the permit template requires field validation (see [When Field Validation Is Required \(on page 58\)](#)), 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.
Field Validation	Permit Issuer	Issue the validated permit.
Issue	Permit Holder or Technician	Acknowledge and execute the permitted work on Mobile.
Surrender	Permit Issuer	Review completion and close the permit.

Within Execute, the Permit Holder acknowledges the permit, performs the work, and surrenders the permit; the Permit Issuer then closes it.

When the permit requires a JHA, the Permit Authorizer cannot authorize the permit until the linked JHA is approved. See [How JHA Connects to the Permit Lifecycle \(on page 88\)](#).

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
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 \(on page 21\)](#) for supported review, authorization, issue, monitoring, closure, and administration work.
- [Access iPermits on Mobile \(on page 23\)](#) for supported field and lifecycle actions.

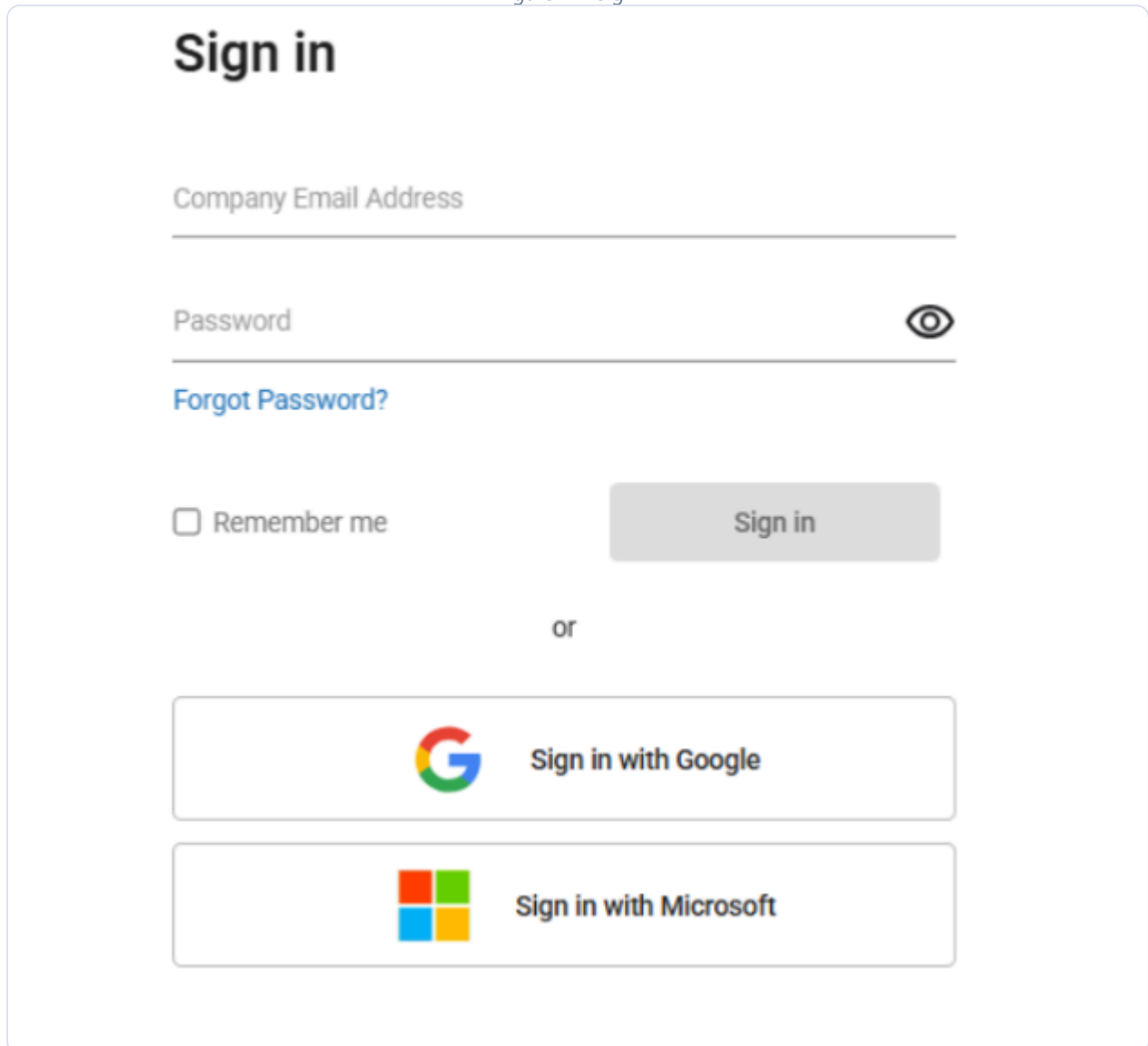
Then open the dashboard or list that contains the permit or JHA action assigned to your role.

4.1. Log in to iPermits Web Application

Sign in to the iPermits Web application with the Email address and Password provided by your organization, or with single sign-on (SSO).

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 Sign In



The sign-in form is titled "Sign in" in a large, bold, black font. Below the title are two input fields: "Company Email Address" and "Password". The "Password" field has a toggle icon (an eye) to its right. Below the "Password" field is a link labeled "Forgot Password?". To the left of the "Sign in" button is a checkbox labeled "Remember me". The "Sign in" button is a grey rectangle with the text "Sign in" in black. Below the "Sign in" button is the word "or". Below "or" are two buttons for single sign-on: "Sign in with Google" (with the Google logo) and "Sign in with Microsoft" (with the Microsoft logo).

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 24)

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, passcode, and biometric instructions, see *Log in to the iMaintenance Application* in the *iMaintenance User Guide for Technicians*.

Next action

Next: identify the Mobile screen used for your assigned action. (on page 30)

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 \(on page 24\)](#) support monitoring, lifecycle processing, template management, and record review.
- [Mobile screens \(on page 30\)](#) 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)

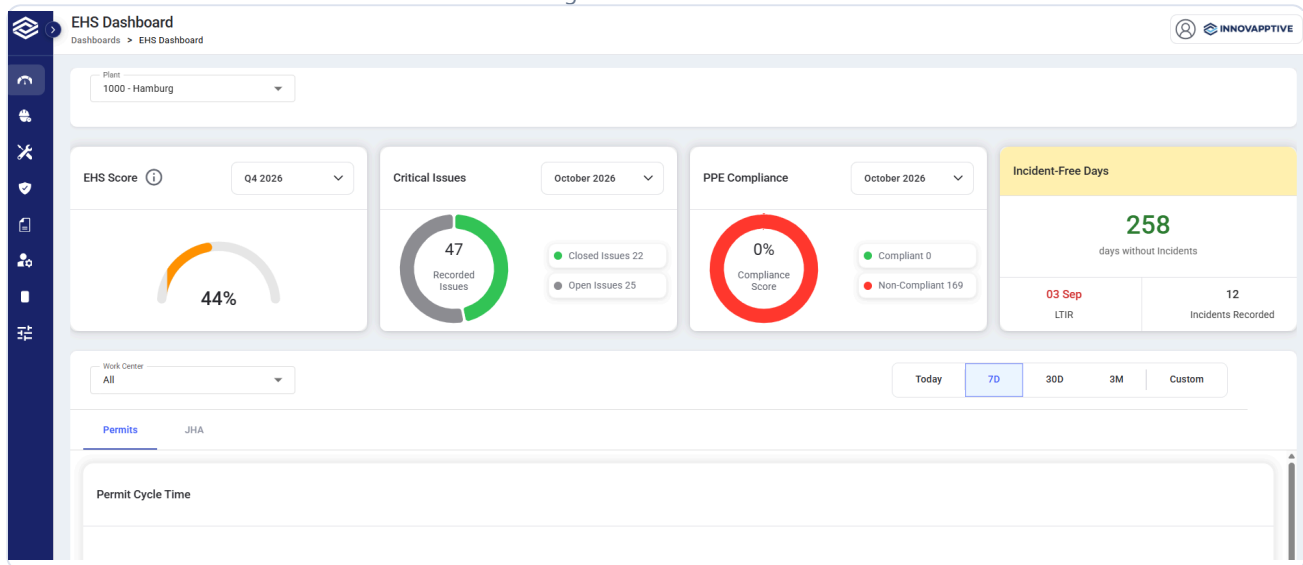
The Dashboard provides a high-level overview of permit and safety performance for the selected plant and time range.

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.

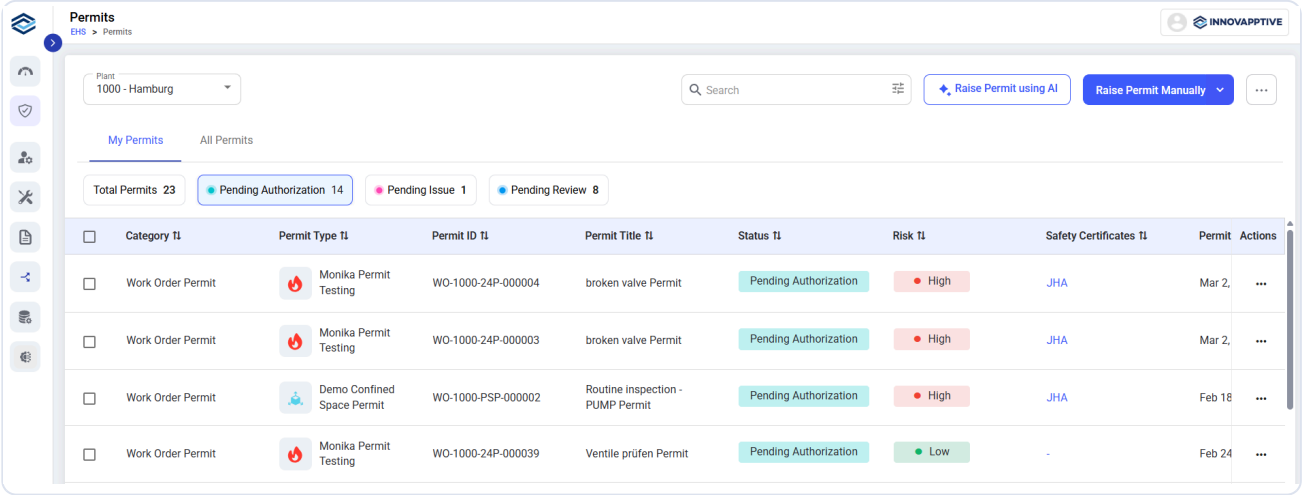
You can switch between **My Permits** (permits assigned to you) and **All Permits** (all permits you are authorized to view). Use the **Plant selector** to view permits for a specific plant. The search bar and filters help you quickly find permits by ID, title, status, or type.

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.

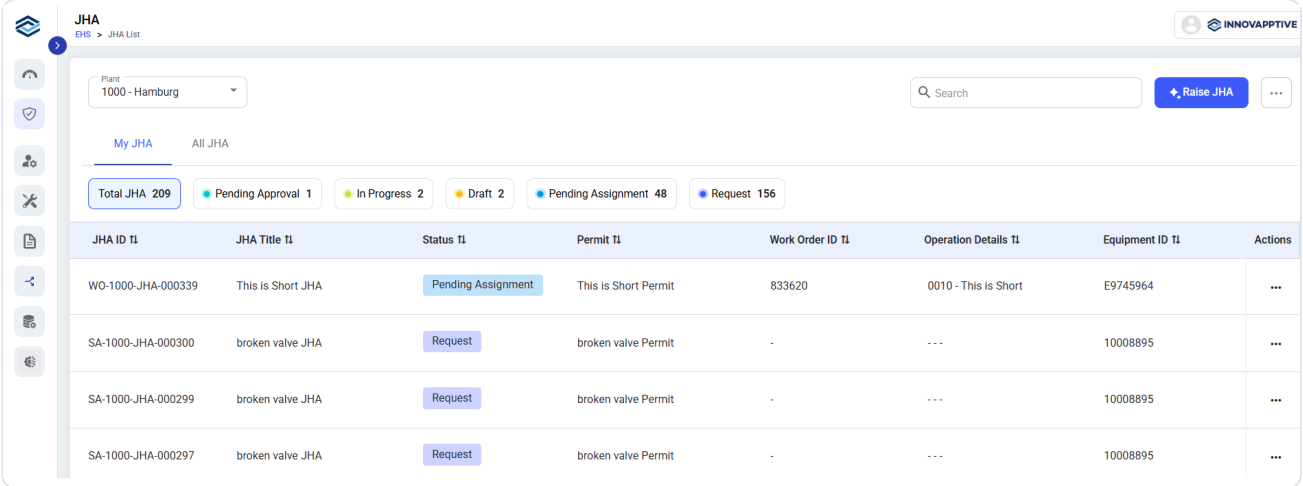
You can switch between **My JHA** (JHAs assigned to you) and **All JHA** (all JHAs you are authorized to view). Use the **Plant selector** to view JHAs for a specific plant. The search bar and filters help you quickly find JHAs by ID, title, status, work order, or equipment.

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



View ICCs (Isolation)

An Isolation Control Certificate (ICC) is used to plan, review, approve, and manage the isolation of equipment associated with permitted work. The ICC helps manage the isolation process through defined stages before equipment is returned to service.

The Isolation screen is used to view and manage ICCs in iPermits. From this screen, you can create new ICCs, view assigned and available ICCs, track the isolation status, and open an ICC to continue its current workflow stage.

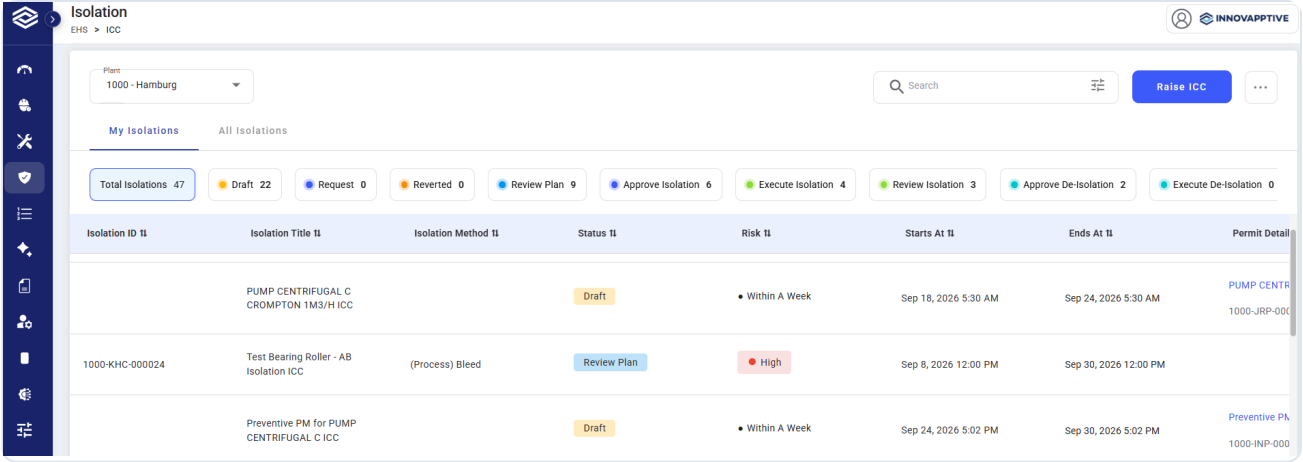
You can switch between **My Isolations** (ICCs assigned to you) and **All Isolations** (all ICCs you are authorized to view). Use the Plant selector to view ICCs for a specific plant. The search bar and filters help you quickly find ICCs by the available search and filter criteria.

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

- **Total Isolations** – Displays the total number of ICCs in the current view.
- **Draft** – Displays ICCs that are in the Draft status.
- **Request** – Displays ICC requests in the current view.
- **Reverted** – Displays ICCs that have been reverted.
- **Review Plan** – Displays ICCs that are awaiting review of the Isolation Plan.
- **Approve Isolation** – Displays ICCs that are awaiting isolation approval.
- **Execute Isolation** – Displays ICCs that are ready for isolation execution.
- **Review Isolation** – Displays ICCs that are awaiting review of the isolation.
- **Approve De-Isolation** – Displays ICCs that are awaiting de-isolation approval.
- **Execute De-Isolation** – Displays ICCs that are ready for de-isolation.

The **Isolation list** shows key details such as **Isolation ID, Isolation Title, Isolation Method, Status, Risk, Starts At, Ends At, and Permit Details**.

Figure 4-5
Isolation Screen



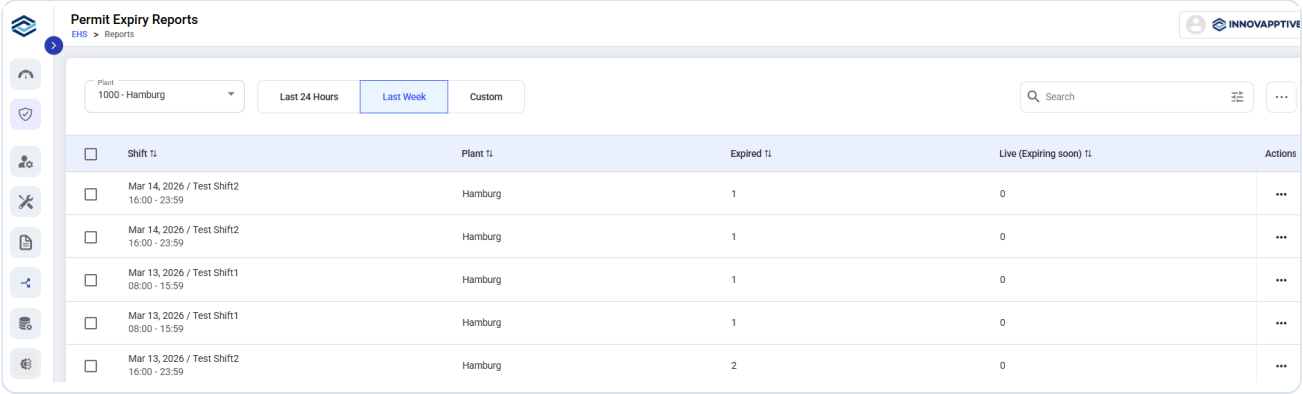
Permit Expiry Reports

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 4-6 Permit Expiry Reports



View Templates (Template Authoring)

The **Template 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 4-7 Authoring Screen

EHS > Authoring

INNOVAPPTIVE

Plant
1000 - Hamburg

22 Templates

Q Search

Create Using AI

Create Manually

Permits

JHA

ICC

Forms

Name	Status T1	Last Published By T1	Last Published T1	Created By T1	Actions
COLD WORK PERMIT	Published	Mudit Malviya	Mar 9, 2026 2:47 PM	Mudit Malviya	...
Electrical Work Permit Text	Published	Srujana B	Mar 6, 2026 3:27 PM	Srujana B	...
P01	Published	Jayaraju M	Mar 6, 2026 1:37 PM	Jayaraju M	...
jnvnnb	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 4-8 Archived Screen

EHS > Archived

INNOVAPPTIVE

Plant
1000 - Hamburg

Q Search

Permit

JHA

Total Permits 12

Closed 1

Rejected 11

Category T1	Permit Type T1	Permit ID T1	Permit Title T1	Status T1	Risk T1	Safety Certificates T1	Permit Start Date T1
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	Vvbbbnjjjjjjjh 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.

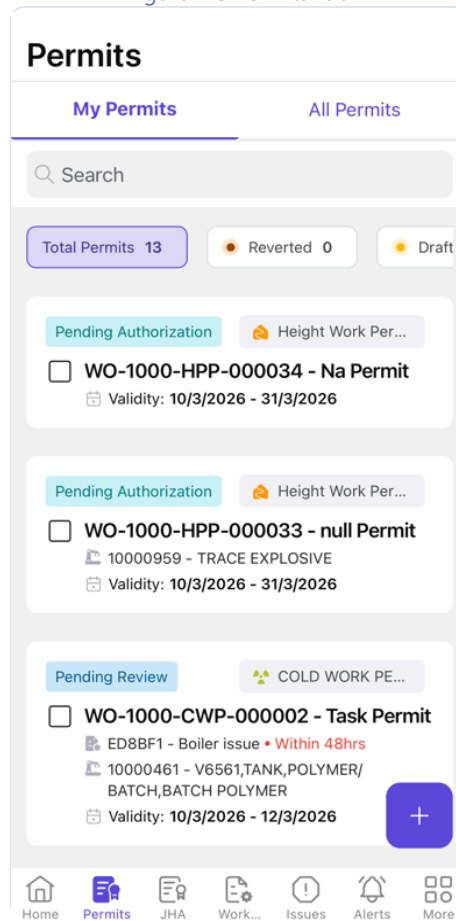
Permits

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 4-9 Permits Tab



JHA

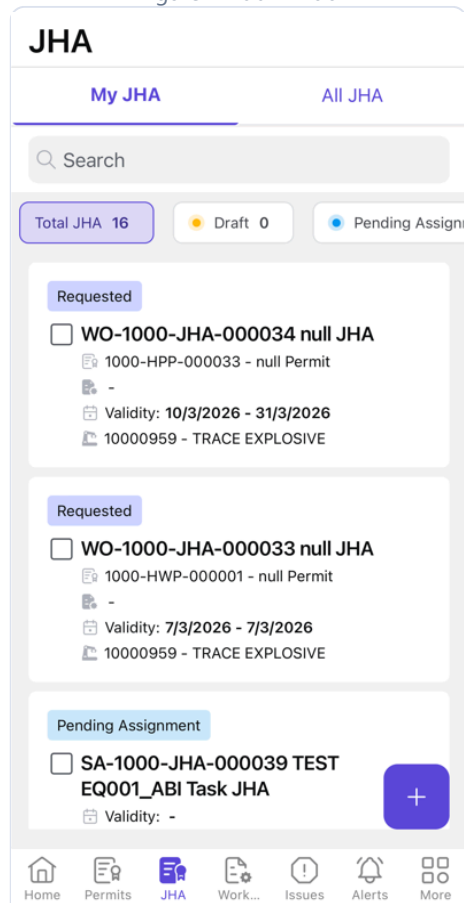
The JHA screen provides access to JHA linked to work activities.

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 4-10 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 Raise a Work-Order-Linked Permit (on page 34)
Only one operation requires the permit	Operation-level permit — see Raise a Work-Order-Linked Permit (on page 34)
Several operations require the same permit	Combined permit — see the Combined Permit section within Raise a Work-Order-Linked Permit (on page 34)
Several permit templates must be represented	Consolidated permit — see Raise a Work-Order-Linked Permit (on page 34)
No work order exists	Standalone permit — see Raise a Standalone Permit (on page 41)

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**.

The screenshot shows the 'Permits' page in the iPermits system. The page is titled 'Permits' and has a sub-header 'EHS > Permits'. The 'Plant' dropdown is set to '1000 - Hamburg'. The 'My Permits' tab is selected, showing a summary of 28 total permits, with 16 pending authorization, 2 pending issue, and 10 pending review. Below this is a table of permits with columns: Category, Permit Type, Permit ID, Permit Title, Status, Risk, Safety Certificates, Permit, and Actions. Three permits are listed: 'TEST 1' (Work Order Permit, Pending Authorization, Low Risk), 'Ventile prüfen Permit' (Work Order Permit, Pending Authorization, Low Risk), and 'drkn Permit' (Work Order Permit, Pending Authorization, Medium Risk). Each permit has a 'Raise Permit Manually' button.

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

7. Click **Continue**.

The screenshot shows the 'Choose Work Order / Operation' dialog. The dialog has a 'Work Center' dropdown set to 'All' and a 'View By' dropdown set to 'Dec 1, 2025 - Mar 27, 2026'. There are 254 Work Orders. The 'Quick Filters' section on the left includes filters for Equipment, Function Location, System Status, User Status, Created By, and Priority. The main list shows two work orders: '833620 - This is Short' (Corrective WO, Feb 3, 2026, E9745964 - PUMP #121) and '833612 - drkn' (Preventive WO, Feb 16, 2026, 10007844 - VALVE, CONTROL_SAMSON,1-1/2"A216WCC). The 'Combined Permit' checkbox is checked.

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 another esnfjs Long text description that might have been need to testn wkengfjds ngjs nawjeknfg * omgrki ngokndfkrngknfd khlinf kdnhkf fdrkhvndskghrsrk nkhndnkngh h njdvncjvxnjvjdnydn 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

Conditional Logic Testing	vvvvvvvvvv
AAAAAAAAAAAA	COLD WORK PERMIT (Selected)
test Permit - Conditional Logic	COLD WORK PERMIT
Electrical Work Permit	P01

Consolidated Permit: ☒

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

ID will be generated upon Submission

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

Please fill the EHS Details

Are there any additional safety forms required for this task?

YES (Selected) NO

Select applicable additional safety forms

JHA (Selected) 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

Browse files or drag and drop here

Upload Images, PDFs, CAD

Upload Drawing

Comments (0)

No comments added

12. Upload the permit plan when the work location, isolation points, or hazard zones need to be shown on a drawing or layout. To upload:

- Click Upload Drawing in the Permit Plan Tab.

13. Verify all entered information before submitting the permit.
14. Select JHA and/or ICC under Additional Safety Forms, if required for the permit. If ICC is selected, enter the Reason for Isolation.
15. Click **Raise** to submit the permit for review.

When the permit requires a JHA or ICC, the configured JHA or ICC 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 51)*

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

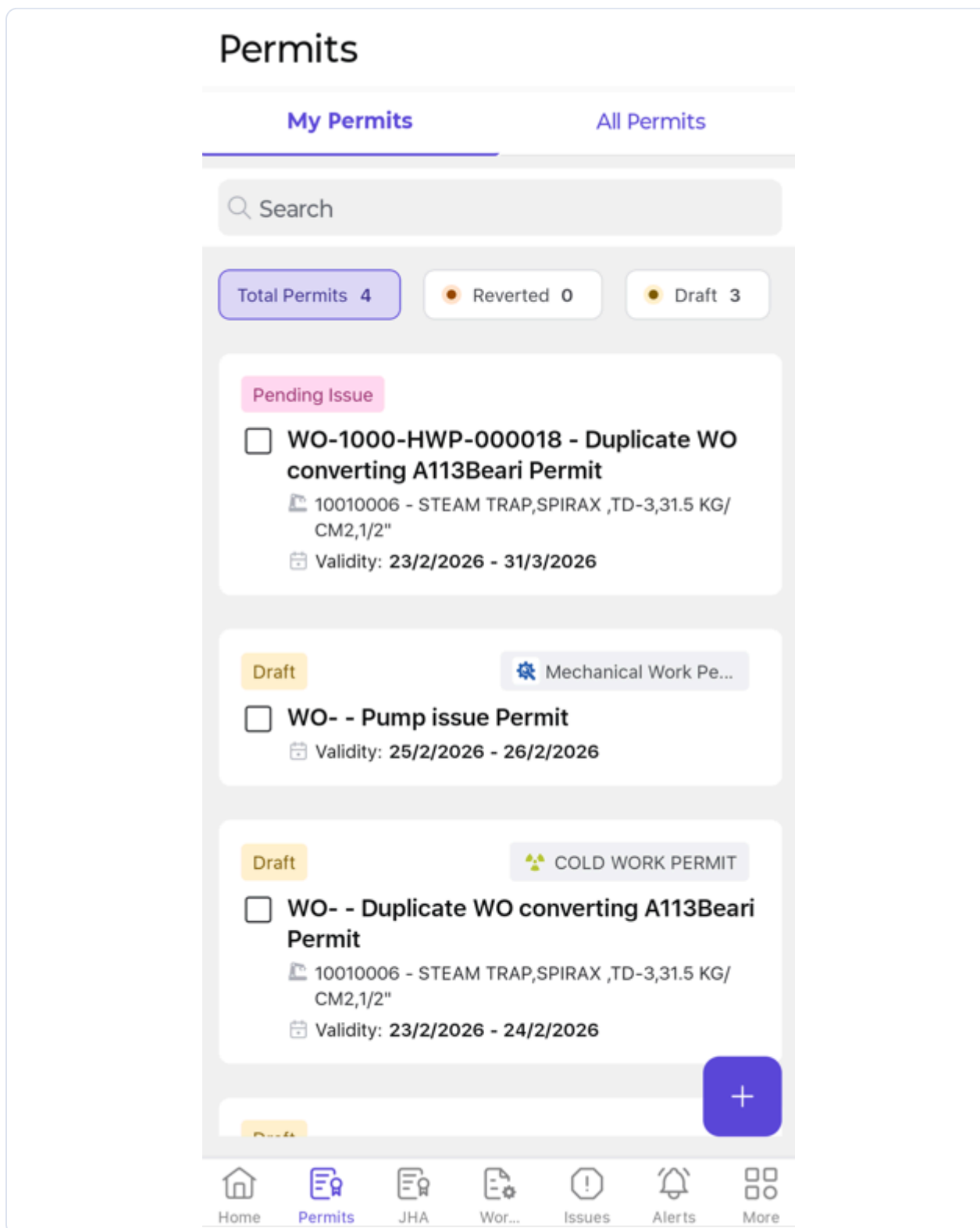
Next: Return to the Web permit-raise procedure. *(on page 34)*

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**.



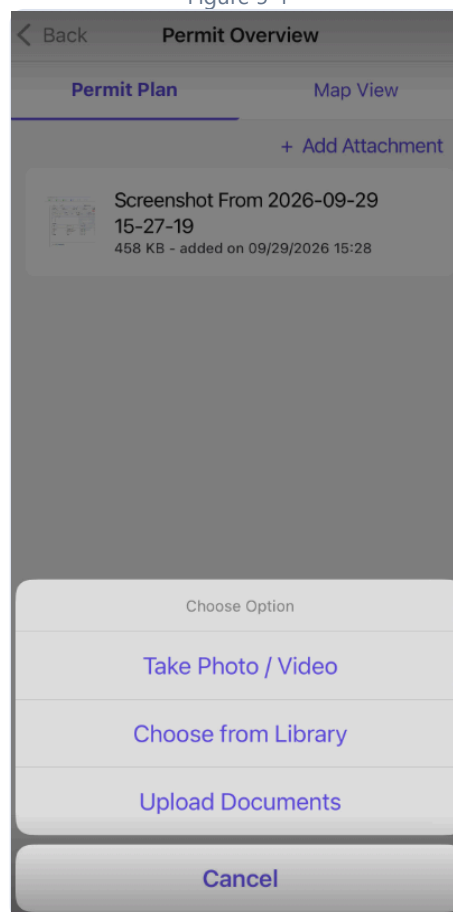
3. Select the required work order and tap **Continue**.
4. Select the applicable operation or operations.
5. Enable **Combined Permit** when one permit applies to multiple selected operations, and tap **Continue**.

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. Add or annotate the permit plan.

A permit plan is a drawing, layout, or photo of the work area. To Add Permit Plan:

- a. Tap the Permit Overview icon at the top right of the permit screen.
- b. tap **+ Add Attachment**.
- c. Select Take Photo / Video, Choose from Library, or Upload Documents.
- d. To annotate a permit plan, tap the file to open it.
- e. Draw, highlight, or add markups using the annotation tools, and save the annotated version.

Figure 5-1



10. Review the permit details.
11. 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 51)*

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 5-2 Standalone Permit - without Work Order

The screenshot shows the 'SA- Hydraulic Press Maintenance Permit' form in the 'COLD WORK PERMIT' tab. 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 'PTW Ref. No.', 'Contractor', and 'Project Name' fields are empty with 'Enter value' prompts. 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 \(on page 43\)](#).

Figure 5-3 Standalone Permit - with Work Order

The screenshot shows the same 'SA- Hydraulic Press Maintenance Permit' form, but the 'Reference type' dropdown is now set to 'Work Order'. A 'Link Work Order' button has appeared at the bottom of the left sidebar. The 'Reference ID' field is empty. The 'PTW Ref. No.', 'Contractor', and 'Project Name' fields remain empty with 'Enter value' prompts. The right sidebar shows 'Comments (0)' and 'History' tabs, with a message 'No comments added'.

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 saved as a draft or submitted to the configured review lifecycle.

Continue with [Execute a Standalone Permit \(on page 79\)](#) after the permit is issued.

Next action

Next: The Permit Reviewer owns the next action: review the submitted permit. *(on page 51)*

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 51)*

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 5-4 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' status. 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. At the top right of the interface, there are 'Raise' and 'saveAndClose' buttons.

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**.

Figure 5-5 Link to Permit

Choose Work Order / Operation

Work Center All

5 Work Orders

View By Jan 1, 2026 - Feb 14, 2026

Search

Quick Filters

By Equipment

By Function Location

By Priority

Emergency

By Type

Corrective WO

Preventive WO

Created By

1108260 - Permits

Corrective WO

Jan 30, 2026 • 10007002 - Compressor

SUPT-003-RA-01 - DEMO SUP FL

WO - 2

1108228 - 8th workorder

Preventive WO

Jan 22, 2026 • 10007002 - Compressor

SUPT-003-RA-01 - DEMO SUP FL

Work Order Level
WO - 3

1108227 - 7th workorder

Preventive WO

Jan 22, 2026 • 10007002 - Compressor

SUPT-003-RA-01 - DEMO SUP FL

1108225 - 5th workorder

Preventive WO

Jan 22, 2026 • 10007002 - Compressor

SUPT-003-RA-01 - DEMO SUP FL

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: Continue the permit from its current lifecycle stage. (on page 19)

1.6. Copy a Permit on Web

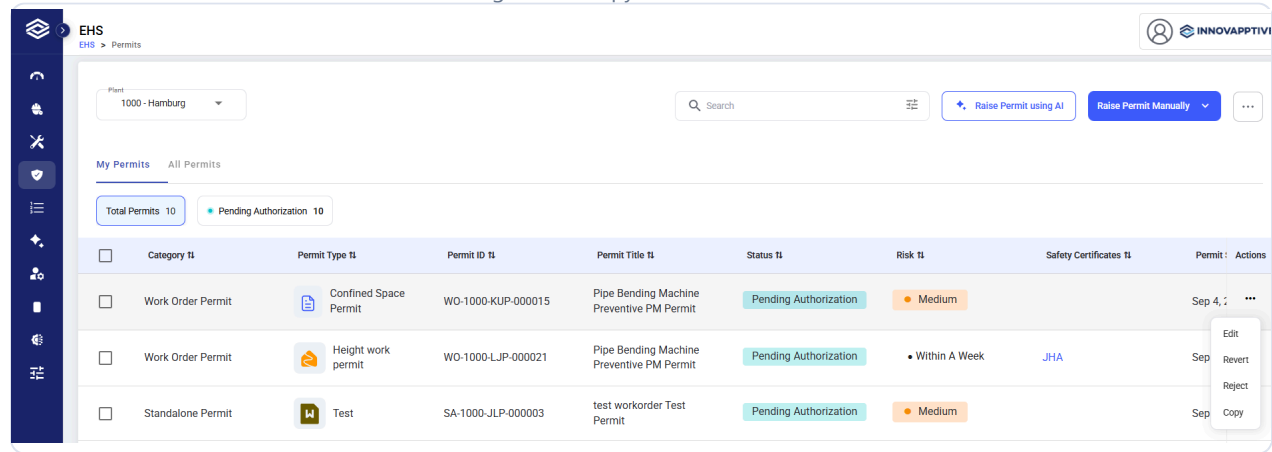
Create a new Draft permit from an existing permit, reusing its PPE, checklists, and eligible authored questions instead of starting from scratch.

Role: Permit Requester. Platform: Web.

To copy a Permit:

- 1. Select the permit you want to copy on the **My Permits** or **All Permits** list.
- 2. Click the **More** (...) icon in the Actions column and select **Copy**.

Figure 5-6 Copy a Permit on Web



- 3. Review the new Draft permit — PPE, checklists, and eligible authored questions are carried over from the original permit.
- 4. Link the draft to a Work Order or another business object:
 - a. If you link a Work Order, Functional Location, Assets, Risk, Assigned Crew, and Validity are populated automatically.
 - b. If you link Others, provide Functional Location, Assets, Activity Details, and required permit form responses manually
- 5. Complete any remaining mandatory fields.
- 6. Click **Submit** to send the permit to the next stage.

The new permit gets a new Permit ID, separate from the original.

Result

The permit is submitted to the configured review stage.

Next action

Next: The Permit Reviewer owns the next action: review the submitted permit. (on page 51)

1.7. Copy a Permit on Mobile

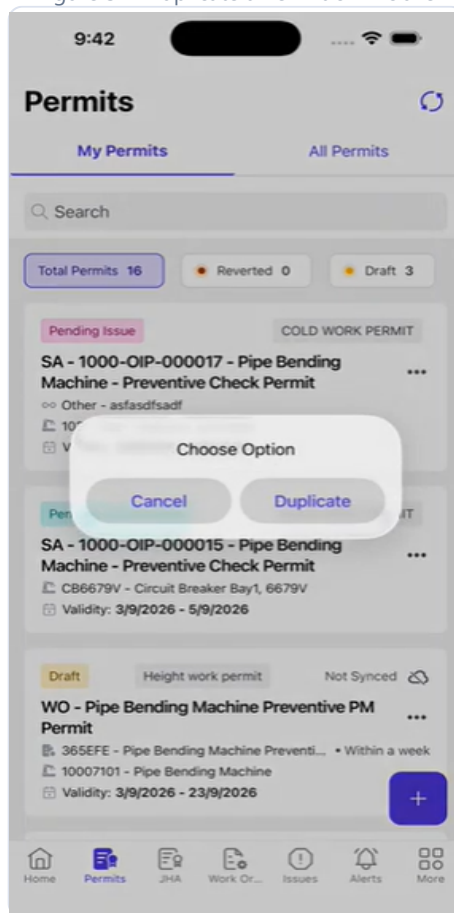
Create a new Draft permit from an existing permit, reusing its PPE, checklists, and eligible authored questions instead of starting from scratch.

Role: Permit Requester. Platform: Mobile.

To copy a Permit:

1. Select the permit you want to copy on the **My Permits** or **All Permits** list.
2. Tap the **More** (...) icon on the permit and select **Duplicate** in the **Choose Option** dialog.

Figure 5-7 Duplicate a Permit on Mobile



3. Review the new Draft permit — PPE, checklists, and eligible authored questions are carried over from the original permit.
4. Link the draft to a Work Order or another business object:
 - a. If you link a Work Order, Functional Location, Assets, Risk, Assigned Crew, and Validity are populated automatically.
 - b. If you link Others, provide Functional Location, Assets, Activity Details, and required permit form responses manually
5. Complete any remaining mandatory fields.
6. Tap **Submit** to send the permit to the next stage.

The new permit gets a new Permit ID, separate from the original.

Result

The permit is submitted to the configured review stage.

Next action

Next: The Permit Reviewer owns the next action: review the submitted permit. *(on page 51)*

1.8. Request Permit Reversion on Web

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 34)*

1.9. Request Permit Reversion on Mobile

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. Tap **Ask for Revert**.
3. Add a comment explaining the changes required (for example, missed to provide PPE details).
4. Tap **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 34*)

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 counts for different permit statuses: Total Permits (31), Draft (2), Pending Authorization (13), Pending Issue (4), and Pending Review (12). The main table lists individual permits with columns for Category, Permit Type, Permit ID, Permit Title, Status, Risk, Safety Certificates, Permit, and Actions. Two permits are shown, both categorized as 'Work Order Permit' and 'Monika Permit Testing', with a status of 'Pending Review' and a risk level of 'High'.

Permits									
Plant 1000 - Hamburg									
My Permits All Permits									
Total Permits 31 Draft 2 Pending Authorization 13 Pending Issue 4 Pending Review 12									
☐	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 54)

1.1. Review the Permit on Mobile

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. Tap **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

The screenshot shows the 'Review the Permit' screen in the iPermits mobile app. At the top, there is a back arrow and a 'Stage 2: Review' dropdown. The permit details section includes 'Text Permit' with ID '1000-LOP-000021' and a task 'Lifting operatio...'. Below this, it shows 'E884C0 - Breakage' with '0010 - Text'. A section titled 'EHS' contains 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 the 'EHS' section is a 'Basic Permit' section. Under 'Basic Permit', there is a 'Permit Validity From' field with the date '03/12/2026 12:34' and a calendar icon. At the bottom, there are three action buttons: 'Mark as Reviewed', 'Revert', and 'Reject'.

6. Tap **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 56)

1.2. Reject the Permit During Review

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 34*)

1.3. Authorize the Permit on Web

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

Category T1	Permit Type T1	Permit ID T1	Permit Title T1	Status T1	Risk T1	Safety Certificates T1	Permit	Actions
Work Order Permit	5 WL PE&O Hot Work Permit Westlake	WO-1000-HWP-000015	Ventile prüfen Permit	Pending Authorization	Low	JHA	Feb 23	...
Work Order Permit	Monika Permit Testing	WO-1000-24P-000004	broken valve Permit	Pending Authorization	High	JHA	Mar 2,	...

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. If the permit is not required, click the **Authorize** dropdown arrow and select **Reject Permit**.

Figure 6-5 Authorize Permit

Result

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

Next action

- When the permit template requires field validation, the permit goes to field validation next. *(on page 58)*
- Otherwise, the Permit Issuer verifies readiness and issues the permit. *(on page 59)*

1.4. Authorize the Permit on Mobile

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. Tap **Take Action**.

5. Select one of the following actions:

- Mark as Authorized:** Approves the permit to the next stage.
- Revert:** Sends the permit back to the requester if changes or corrections are required.
- 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 for '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. At the bottom, there's a 'Permit Validity From *' field with the date '03/03/2026 16:17'. A bottom menu is open, showing three options: 'Mark as Authorized', 'Revert', and 'Reject'.

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

7. Tap **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

- When the permit template requires field validation, the permit goes to field validation next. (on page 58)
- Otherwise, the Permit Issuer verifies readiness and issues the permit. (on page 59)

1.5. When Field Validation Is Required

Field validation is a conditional stage between Authorize and Issue. Check whether your permit needs it before you look for the Issue action.

Role: Permit Authorizer, Field Validator, Permit Issuer. Platform: Web and Mobile.

If the permit	After authorization
Was raised from a permit template that includes the Atmospheric Log additional form	The permit goes to the Field Validation stage. Perform Field Validation (for Special Permits) (on page 58) . The permit moves to the Issue stage only after successful validation.
Was raised from a permit template without the Atmospheric Log additional form	The permit goes directly to the Issue stage. See Issue the Permit on Web (on page 59) or Issue the Permit on Mobile (on page 60) .

Field validation is used for special permit types, such as a confined space permit. The template author enables it by selecting **Atmospheric Log** under **Additional Forms** in [Create Permit Template \(on page 129\)](#).

1.6. 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 tap **Submit**.

Result

The field-validation readings and result are recorded, allowing the permit to proceed when the configured criteria are satisfied. The permit moves to the Issue stage only after successful validation.

Next action

Next: After successful field validation, the Permit Issuer issues the permit. (*on page 59*)

1.7. Issue the Permit on Web

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

To hold or reject the permit at this stage, see [Hold the Permit \(on page 63\)](#) or [Reject the Permit at Issue \(on page 63\)](#).

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

Due: 7:07:00 AM • March 31, 2026

Function Location

Unit A @ Chauffage mobile 400000 BTU

1000-158-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

Next: The Permit Holder or Technician now executes the issued permit on Mobile. (on page 68)

1.8. Issue the Permit on Mobile

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. Tap **Take Action**.

Figure 6-8 Issue the Permit

← 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 Permits

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. Tap **Submit** to move the permit to the Execute stage.

Result

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

Next action

Next: The Permit Holder or Technician now executes the issued permit on Mobile. (on page 68)

1.9. Reject the Permit at Issue

The Permit Issuer can reject the permit when it is no longer required.

Role: Permit Issuer. Platform: Web.

For example, if the work is already completed or the repair is scheduled for a later date.

Follow the steps below to reject 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 reject.
4. Review the permit details.
5. Click the dropdown arrow on the **Issue** button.
6. Select **Reject** Permit.
7. Enter a **comment** specifying the reason for rejection.
8. Click **Reject** to confirm.

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 34*)

1.10. 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. On Mobile, **Hold** is one of the **Take Action** options in [Issue the Permit on Mobile \(on page 60\)](#).

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 'WO - broken valve Permit' form. At the top, a progress bar indicates the current step is 'Issue'. The 'Issue' button has a dropdown menu open, showing 'Reject Permit' and 'Hold Permit' options. The 'Hold Permit' option is selected. The form contains several sections: 'Work Order Details' (Preventive WO, 833640 - broken valve, Due: 7:07:00 AM • March 31, 2026), 'EHS Details' (Are there any additional safety forms required for this task? YES/NO), 'Basic Permit Details' (Crew Members: Monika Sunkaraa, Yatharth S), and 'Permit Plan' (Upload Drawing). The 'Operations' tab is active at the bottom.

Result

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

Next action

Next: Resume the permit only after the blocking conditions are revalidated. (on page 64)

1.11. 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

Next: [Return to the applicable permit-execution route. \(on page 68\)](#)

1.12. 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' interface in the iPermits application. On the left, a sidebar lists selection options: 'Select All', 'Permits', 'Evidences', 'Attachments', and 'Signature'. The main area displays a permit form for 'Monika Permit Testing'. The form includes a QR code, a table for permit details, and sections for location, validity, EHS, and basic permit details.

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	1000-004-0001 A/Equipments Maintenance	10000002 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.

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 \(on page 70\)](#).

For the complete work-order execution journey, see *Execute a Work Order* in the *iMaintenance User Guide for Technicians*.

1.1. Scan Permit Using QR Code

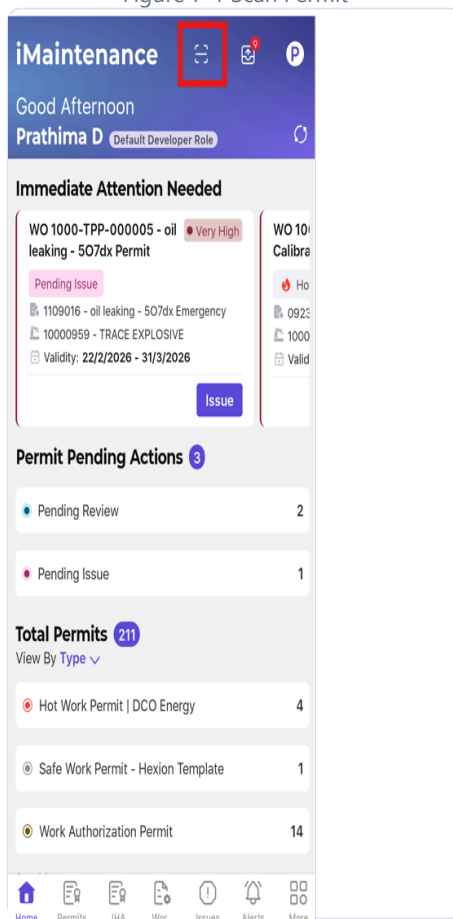
Scan a QR code from a printed or digital permit to quickly access and open the permit in the mobile application without manual search.

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

To scan the QR code:

1. Open iMaintenance.
2. Tap the scanner option on the Home screen.

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 68)*

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 70)*

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.



Note:

Fields you answer during Acknowledgement depend on how the permit template was configured in Authoring.

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 72)

To reach this permit from your work order, see *Acknowledge the Permit for Your Job* in the *iMaintenance User Guide for Technicians*.

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

← Acknowledge Permit

N/A

Has the Permit Holder warned others that may be affected by your work?

✓ Yes

No

Add Contractors
Include contractor acknowledgements before submitting

Add

Skip

Cancel

Does the work party know the most effective route and the location of the nearest muster point?

N/A

Submit

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. \(on page 73\)](#)

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. \(on page 73\)](#)

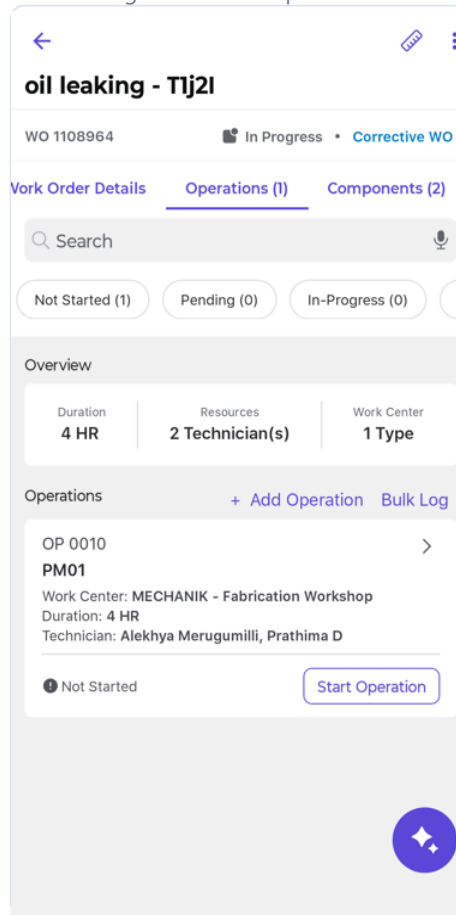
1.6. Start and Perform the Work

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.

Figure 7-4 Start Operation



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 80)*
- When the work and required checks are complete, end the work. *(on page 75)*
- Hold work when conditions no longer support execution. *(on page 75)*

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 73)

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. \(on page 76\)](#)

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 Web \(on page 84\)](#) or [Close the Permit on Mobile \(on page 85\)](#).

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, the instruction '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 located 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. \(on page 84\)](#)

For surrender within the work-order journey, see *Surrender the Permit* in the *iMaintenance User Guide for Technicians*.

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 84)*

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 84)*

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.	Complete a Single-Instance Permit Form (on page 80)
A form allows separate repeated entries.	Complete a Multiple-Instance Permit Form (on page 81)
An atmospheric reading is due.	Record Atmospheric Readings (on page 81)
A reading alert appears.	Respond to an Atmospheric Reading Alert (on page 82)

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 73)*

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 73)*

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 73)*

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 73)*

5. Close the Permit on Web

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.

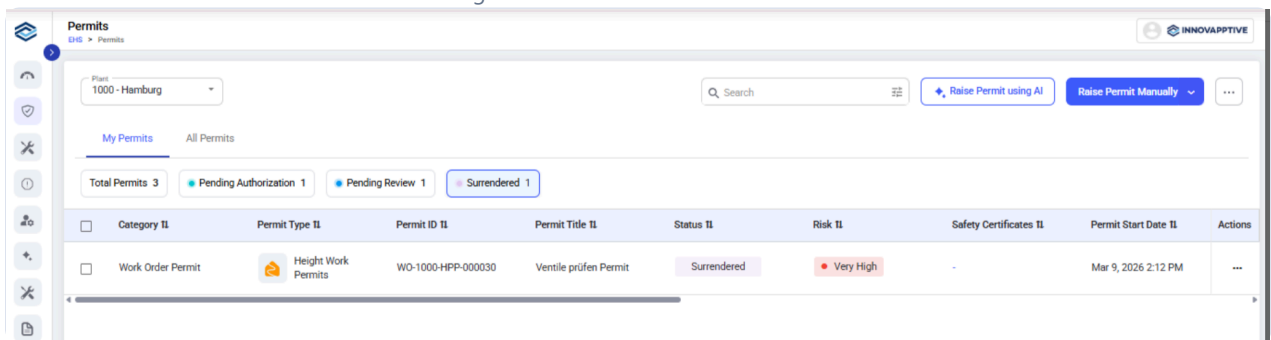
Role: Permit Issuer. Platform: Web.

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

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 118)

5.1. Close the Permit on Mobile

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. Tap **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. 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 dropdown menu shows '1109015 - oil leaking - 507dx' with the sub-item '0010 - * Ventile prüfen'. 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, the 'Basic Permit s' section is expanded, showing 'Permit Validity From *' with the date '03/03/2026 16:52' and 'Permit Validity To *' with the date '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 118)

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, the linked permit can proceed to authorization. See [How JHA Connects to the Permit Lifecycle \(on page 88\)](#).

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.

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

1.1. How JHA Connects to the Permit Lifecycle

When a permit requires a JHA, the JHA runs its own lifecycle and the permit cannot be authorized until the linked JHA is approved.

Role: Permit Requester, JHA Requestor, JHA Owner, JHA Team, Permit Authorizer. Platform: Web and Mobile.

Point in the permit lifecycle	What happens to the JHA	Where to continue
The requester raises a permit that requires a JHA	The configured JHA request is initiated as part of the permit workflow.	The JHA Requestor opens the request from the Request tab (Request Received) on the JHA screen and raises the JHA. See Raise a JHA on Web (on page 89) .

Point in the permit lifecycle	What happens to the JHA	Where to continue
Before authorization	The JHA moves through Initiate → Assign → In Progress → Approve .	The JHA Owner assigns the JHA Team, the team completes Work Acknowledgement, and the JHA Owner approves the JHA. See Create and Manage JHA (on page 88) .
Authorize	If the linked JHA is not yet approved, the Permit Authorizer cannot authorize the permit.	After the JHA is approved, the Permit Authorizer continues with Authorize the Permit on Web (on page 54) or Authorize the Permit on Mobile (on page 56) .
JHA is reverted for changes	Team members must re-acknowledge after the changes are made.	See Complete Work Acknowledgement on Web (on page 96) or Complete Work Acknowledgement on Mobile (on page 98) .

1.2. Raise a JHA on Web

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

Role: JHA Requestor. Platform: Web.

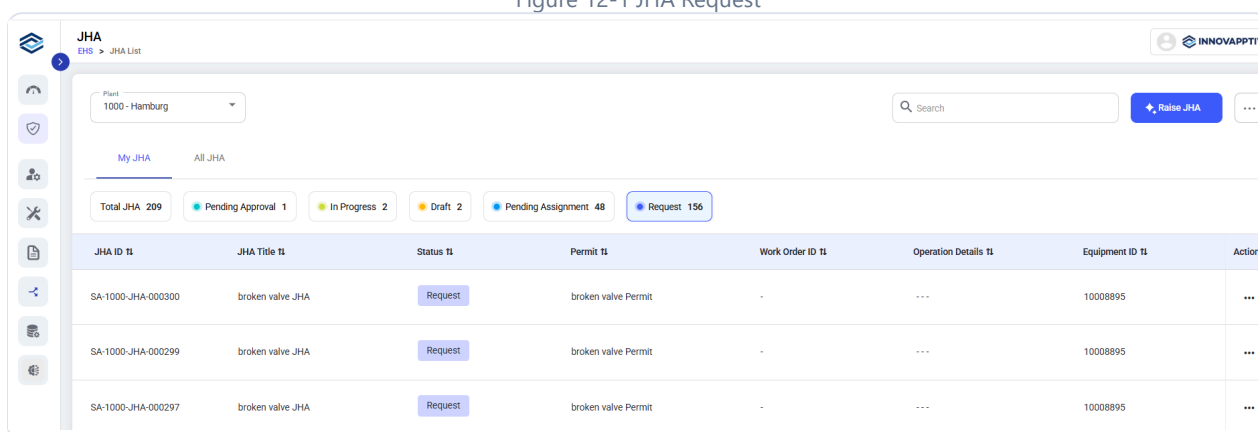
Use this procedure to create a new JHA based on a predefined template. During this process, you define the activity, break it into job steps, and identify hazards and control measures.

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

To raise a JHA:

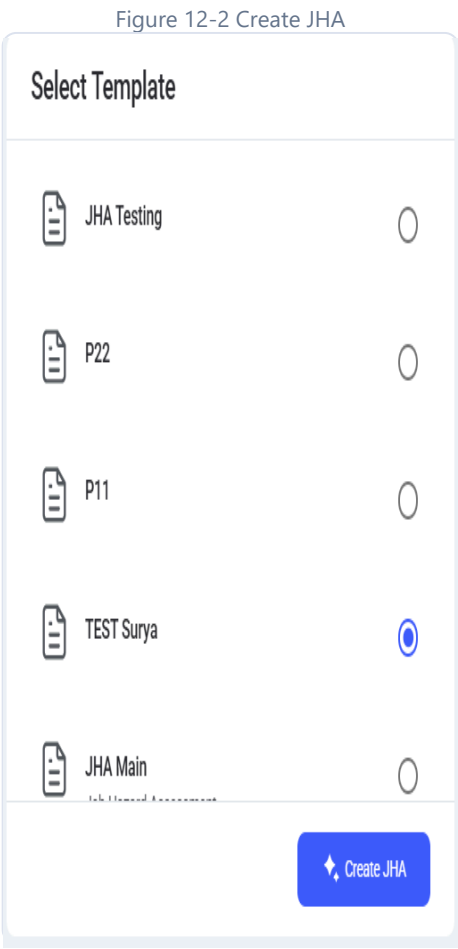
1. Navigate to **EHS** → **JHA** from the left navigation panel.
2. Go to the Request tab and click Request Received.

Figure 12-1 JHA Request



3. Select the required template from the Select Template screen if multiple JHA templates are available.

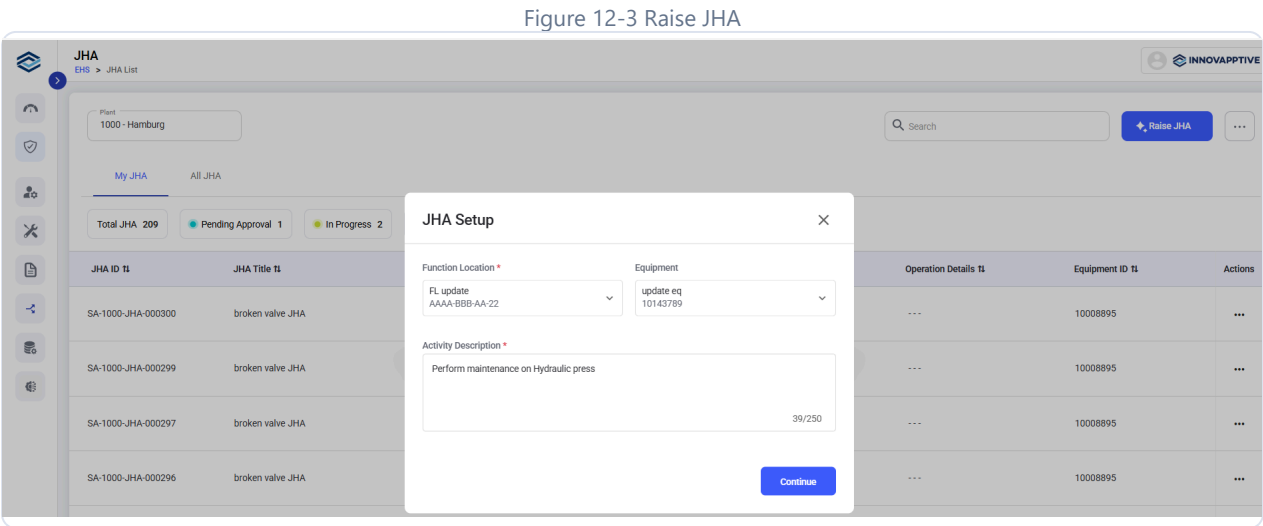
4. Click **Create JHA** (or)



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



7. Answer the questions if the selected template includes a **Master Question** section.
8. Define job steps, add predefined questions linked to each step.
9. For each job step:
 - Select applicable **Hazards**
 - Define corresponding **Control Measures**
 - Assign the appropriate **Risk Level**.
10. Add Questions.
11. Upload supporting documents or images and add notes for additional context.
12. Add new steps or questions as required.
13. Click **Submit**.

The JHA ID is generated automatically upon submission.

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

Figure 12-4 Submit JHA

Pipe Bending Machine BY ABI JHA
ID generated on submit

All Changes Saved **Submit**

Master Question

Name
Enter value

Age
Enter value

Available?
YES NO

Step	Potential Hazards	Control Measures	Risk Assessment
1	Enter text	Enter text	Enter text

Result

The JHA is created and moves to the assignment stage.

Next action

Next: The JHA Owner assigns the field team next. (on page 93)

1.3. Raise a JHA on Mobile

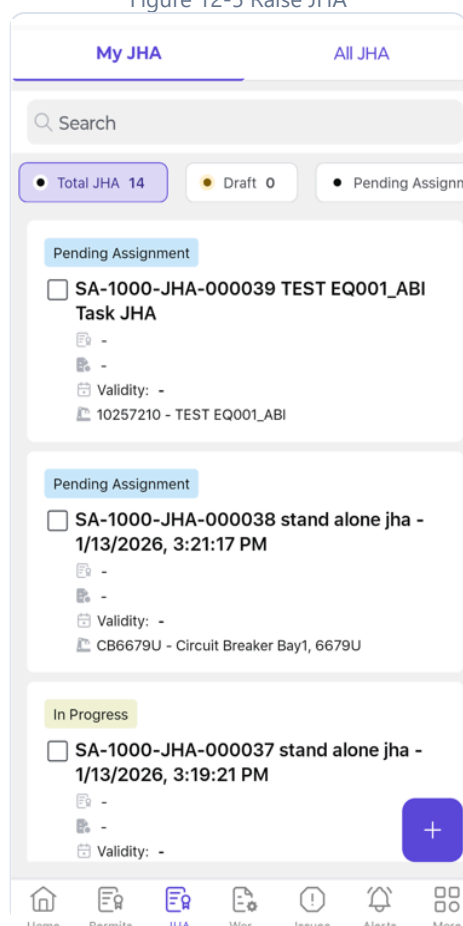
Raise a JHA from Mobile by defining the job, selecting the template, and submitting the hazards and controls for assignment.

Role: JHA Requestor. Platform: Mobile.

To raise a JHA:

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

Figure 12-5 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. Tap **Generate JHA**.

7. Define Job Steps and add the predefined questions linked to each step.

8. Tap **Submit Request**.

Figure 12-6 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:

- Functional Location ***: A dropdown menu showing 'Pump station' and '00-B01'.
- Equipment**: A dropdown menu showing 'Electric pump 001' and 'TEY-00'.
- Define Activity ***: A text input field containing the text: 'Perform maintenance on the hydraulic press, ensuring proper safety procedures are followed.'
- Template ***: 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 form 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 93)

1.4. Assign the JHA Team on Web

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.

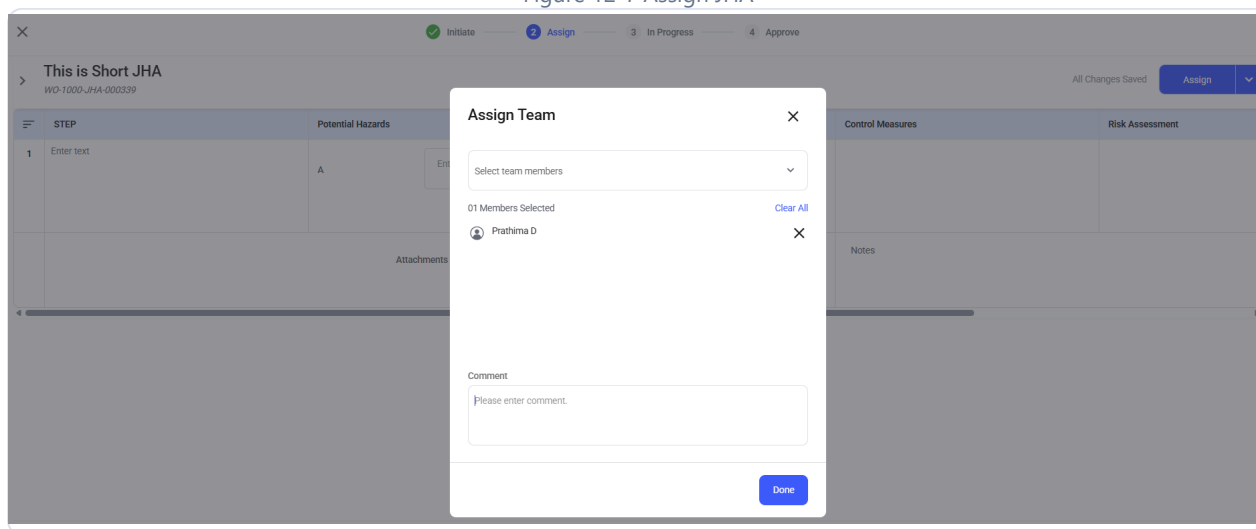
Role: JHA Requestor. Platform: Web.

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 12-7 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 96)

1.5. Assign the JHA Team on Mobile

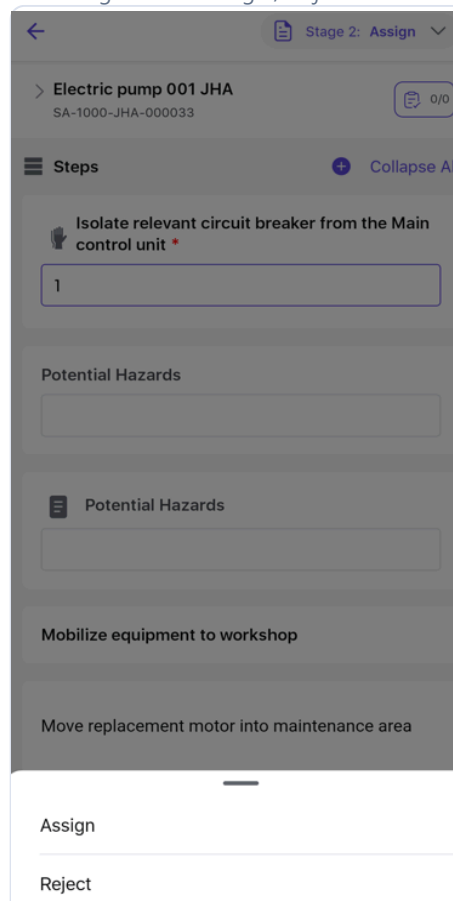
Assign the required field participants so they can review and acknowledge the JHA before approval.

Role: JHA Requestor. Platform: Mobile.

To Assign JHA:

1. Tap the **JHA tab**.
2. Go to the **Total JHA** or **Pending Assignment** tab.
3. Select the JHA that needs to be assigned.
4. Tap **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.

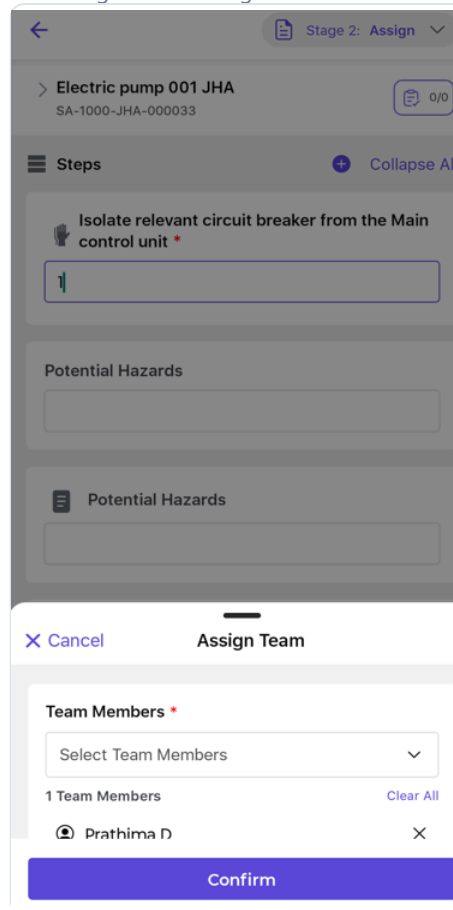
Figure 12-8 Assign / Reject JHA



6. Tap **Assign**.

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

Figure 12-9 Assign Team to JHA



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 96)

1.6. Complete Work Acknowledgement on Web

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 12-10 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 "WD-1000-JHA-020063". It has a progress bar with four steps: Initiate, Assign, In Progress (current), and Approve. The main content area is divided into four columns: STEP, Potential Hazards, Control Measures, and Risk Assessment. A modal titled "Work Acknowledgement" is open in the center. The modal shows the user "Prathima D (Me)" with a status dropdown set to "Completed". There is a text input field for a comment and a "Done" button at the bottom right. The background JHA form is dimmed.

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 100)

1.7. Complete Work Acknowledgement on Mobile

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.

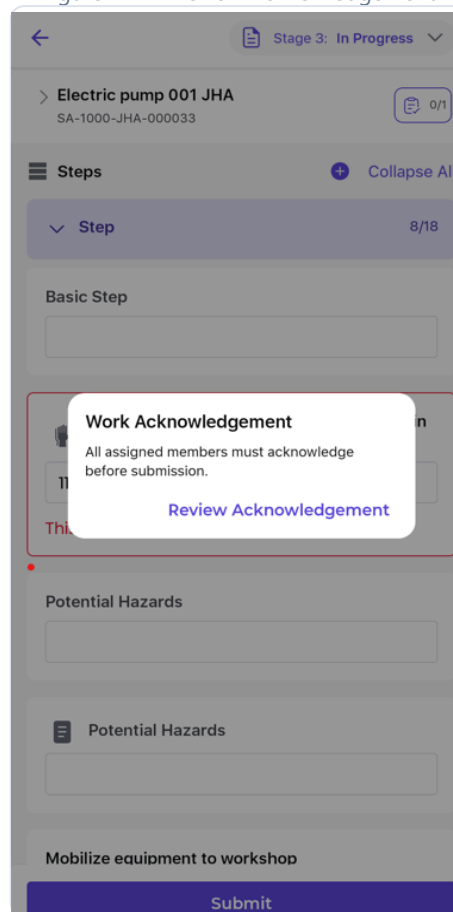
To acknowledge the JHA:

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. Tap **Submit**.

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

4. Tap **Review Acknowledgement**.

Figure 12-11 Review Acknowledgement



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

Figure 12-12 Change JHA Status

The screenshot shows 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, there is a button labeled 'Mark all as completed'. The main content area displays a user profile for 'Prathima D' with a status dropdown menu currently set to 'In Progress'. Below the profile, there 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 tap **Confirm**.

Figure 12-13 Confirm Acknowledgement

Figure 12-13 shows the 'Work Acknowledgement' confirmation screen. The screen displays a 'Cancel' button, the title 'Work Acknowledgement', and a 'Mark all as completed' option. A user profile for 'Prathima D' is shown with a 'Complete' status. A comment field contains the text 'Completed'. The bottom of the screen features a large purple 'Confirm' button.

7. After all assigned team members complete their acknowledgement, tap **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 100*)

1.8. Approve, Revert, or Reject a JHA on Web

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 12-14 Approve JHA

The screenshot shows the 'Approve JHA' interface. At the top, there's a progress bar with four steps: 'Initiate' (checked), 'Assign' (checked), 'In Progress' (checked), and 'Approve' (active). Below the progress bar, the JHA title is 'Fix Motherboard Overheating - 2B2 JHA' with a reference ID 'WFO-1000-JHA-000063'. On the right, there's a button 'Approve' and a dropdown menu with options 'Reject JHA' and 'Revert JHA'. The main content is a table with four columns: 'STEP', 'Potential Hazards', 'Control Measures', and 'Risk Assessment'. The table has two rows, each with a 'STEP' column containing '1' and '2', and a 'Enter text' input field. The 'Potential Hazards' column has a 'Hazards' label and a 'Select option' dropdown. The 'Control Measures' column has a 'Control Measure' label and a 'Select option' dropdown. The 'Risk Assessment' column has a 'RISK' label and a 'Select option' dropdown. Below the table, there are sections for 'Attachments' and 'Notes'.

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: When the approved JHA is linked to a permit, the Permit Authorizer can now authorize the permit. (on page 54)

1.9. Approve, Revert, or Reject a JHA on Mobile

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. Tap 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 tap **Approve**, add Signature and Comments, then tap **Submit**.
 - b. If you tap **Revert**, provide valid Comments for reverting the JHA and tap **Submit**.
 - c. If you tap **Reject**, provide valid Comments for rejecting the JHA and tap **Submit**.

Figure 12-15 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: When the approved JHA is linked to a permit, the Permit Authorizer can now authorize the permit. (*on page 54*)

VI. Part VI: Create and Manage Isolations

1. Create and Manage Isolations

Create an Isolation Control Certificate (ICC), define the isolation plan, and move the isolation through the required review, approval, isolation, de-isolation, and closure stages.

Isolation Workflow

The normal path is **Plan** → **Review** → **Approve Iso** → **Isolate** → **Review Isolation** → **Live** → **Approve De-Iso** → **De-Isolate** → **Close**.

Different roles perform specific actions at each stage based on their assigned Isolation permissions.

See [Role-Based Permissions \(on page 15\)](#) for detailed information about the roles and actions available at each stage.

1.1. Raise a Isolation on Web

Create a new Isolation Control Certificate (ICC) from a predefined template and provide the required isolation details and plan.

Role: ICC Owner. Platform: Web.

Use this procedure to create a new ICC based on a predefined template. During this process, provide the required isolation details, define the Isolation Plan, and submit the ICC for review.

To raise a ICC:

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

Figure 13-1 Isolation Request

The screenshot shows the 'Isolation' interface with a search bar and a 'Raise ICC' button. Below is a table of isolation requests.

Isolation ID	Isolation Title	Isolation Method	Status	Risk	Starts At	Ends At	Permit Details
	PUMP CENTRIFUGAL C CROMPTON 1M3/H ICC		Request	• Within A Week	Sep 18, 2026 5:30 AM	Sep 24, 2026 5:30 AM	PUMP CENTRIFUGAL C CR... 1000-JRP-000008

3. Select the required template from the Select Template screen if multiple ICC templates are available.
4. Click **Proceed** (or)
5. Click **Raise ICC** at the top right corner.

6. Provide the required details in the ICC 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. **Activity Description** - Specify the activity or task for which the ICC is being created

Figure 13-2 Raise ICC

The screenshot shows the 'ICC Setup' dialog box with a close button (X) in the top right corner. It contains three main input sections: 'Function Location' with a dropdown menu showing 'Compr1 - Gear Box' and '1710-SPA-SAA-PLAR1-CGB2'; 'Equipment' with a dropdown menu showing 'Select Equipment'; and 'Activity Description' with a text area containing 'Isolate electrical energy before electrical work' and a character count '48/250'. A blue 'Continue' button is located at the bottom right.

ICC Setup ✕

Function Location *

Compr1 - Gear Box
1710-SPA-SAA-PLAR1-CGB2

Equipment

Select Equipment

Activity Description *

Isolate electrical energy before electrical work

48/250

Continue

7. Select the required template from the Select Template screen if multiple ICC templates are available.

8. Click **Proceed**.

The ICC form opens with the Plan stage.

9. Complete the mandatory fields in the ICC form:

- Select the required Reference Type.
- Select the applicable Work Order from Work Order Details.
- Enter the Reason for Isolation.
- Enter or verify the Permit Validity To date and time.
- Select the required Risk Assessment level.

10. Upload the Isolation Plan drawing, if required.

11. Review the entered information and do one of the following:

- Click **Save to Draft** to save the ICC and complete it later.
- Click **Submit** to submit the ICC for review.

Figure 13-3 Isolation Form

The screenshot shows the 'Isolation Form' in a 'Draft' state. The form title is 'Isol-Elect-Work on Compr1 Gear Box ICC'. A blue banner at the top indicates 'AI needs help this time' with a message: 'No historical record available - Completing this form manually helps AI improve its suggestions next time.' The form is divided into several sections: 'Reference type' (set to 'Other'), 'Asset Details' (Function Location: Compr1 - Gear Box, Equipment: 1710-SPA-SAA-PLAR1-CGB2), 'Reference Id' (Contractor crew from Acme Services performing scheduled maintenance under contract PO-4471), 'Basic Details' (Permit validity from: Sep 29, 2026, 12:00 PM; Permit validity to: Oct 8, 2026, 12:00 PM; Risk Assessment: Medium), and 'Isolation Plan' (Upload Drawing button). A 'Comments (0)' section is also visible.

Result

The ICC is created and moves to the Review stage.

Next action

Next: [Review and Prepare Isolation Plan \(on page 107\)](#).

1.2. Review and Prepare Isolation Plan

Review the submitted isolation plan to verify the isolation details and return the ICC to the ICC Owner when corrections are required.

Role: ICC Reviewer. Platform: Web.

The normal path is **Review** → **Approve** → **Approve De-Isolation** → **Verify De-Isolation**.

- **Revert:** Return the ICC to the ICC Owner for correction. At the Approve stage, the ICC can also be returned to an earlier stage.
- **Reject:** End the lifecycle for that ICC with the reason retained. At the Approve stage, a rejected ICC goes back to the ICC Owner for rework.
- **Hold:** Pause the de-isolation when issues or further checks prevent it from going ahead. The ICC Owner can't execute the de-isolation while it's on hold.
- **Revert De-Isolation:** Return an incorrectly executed de-isolation to the ICC Owner to be done again.

To review the Isolation Plan:

1. Navigate to **EHS** → **Isolation** from the left navigation panel.
2. Click **Total Isolations** or **Review Plan** tab.
3. Select the ICC to review
4. Review the ICC details.
5. Click **Review** → **Revert** to send the ICC back to the requester if changes are required.
6. Click **Review** to approve the Isolation Plan and move the ICC to the Approve Iso stage.

Figure 13-4
Review Isolation

Result

The ICC either advances to the Approve Iso stage or returns to the ICC Owner for correction based on the selected action

Next action**Next:** Approve Isolation Plan (on page 109)

1.2.1. Approve Isolation Plan

Review and approve the Isolation Plan before moving the ICC to the isolation stage.

Role: ICC Approver. Platform: Web.

To approve the Isolation Plan:

1. Navigate to **EHS** → **Isolation** from the left navigation panel.
2. Click **All Isolations** or **Approve Isolation** tab.
3. Select the ICC to approve.
4. Review the ICC details.
5. Click **Submit** → **Revert** to send the ICC back to the requester if changes are required.
6. Click **Submit** to approve the Isolation Plan and move the ICC to the Isolate stage.

Figure 13-5
Approve Isolation

The screenshot displays the 'Approve Isolation' web interface for a specific ICC. At the top, a progress bar shows stages: Plan, Review, Approve Iso (active), Isolate, Review Isolation, Live, Approve De-Iso, De-isolate, and Close. The main title is 'Test Bearing Rolling machine Isolation ICC' with ID '1710-ICC-000003'. A 'Submit' button is in the top right. The interface is divided into sections: 'Basic Details' (containing 'Reference type' dropdown set to 'Other'), 'Asset Details' (listing 'Function Location' as 'Scanning Zone-A1-u 1000-100-AB-11' and 'Equipment' as 'Bearing Rolling machine 10002807'), 'Risk Assessment' (with buttons for 'High', 'Medium', 'Low', and 'Very High'), 'Reason for Isolation' (text area with 'Test workflow'), and 'Isolationdwdw' (dropdown set to 'Valve'). On the right, there's a 'Revert' button, an 'Isolation Plan' tab, a 'Map View' button, and a file upload area with a cloud icon and 'Upload Drawing' button. At the bottom right, there are 'Comments (0)' and 'History' tabs.

Result

The ICC moves to the Isolate stage when approved. When reverted, the ICC returns to the previous stage for correction.

Next action

Next:

1.2.2. Reject Isolation Plan - TBD

1.2.3. Hold Isolation Plan - TBD

2. Execute and Close Isolations - TBD

2.1. Review an Isolation

After the isolation is executed in the field, the ICC Reviewer verifies that it was performed as planned before the ICC moves to the Live stage.

Role: ICC Reviewer. Platform: Web.

To review the Isolation:

1. Navigate to **EHS** → **Isolation** from the left navigation panel.
2. Click **Total Isolations** or **Review Isolation** tab.
3. Select the ICC to review
4. Review the ICC details and confirm that the isolation was performed as planned.
 - a. Compare the executed isolation with the Isolation Plan drawing. Make sure every isolation point in the plan is isolated, and that no point is missing.
 - b. Make sure every checklist item is completed like the isolation point is confirmed and verified, the energy source type is marked etc.
5. Add review notes in the Comments tab
6. Click **Submit** → **Revert** to send the ICC back to the ICC Owner if corrections or additional details are required. Enter the reason for the revert.
7. Click **Submit** to confirm that the isolation was performed as planned.

Result

The ICC moves to the Live stage. If the ICC is reverted, the ICC Owner is notified with the reason.

Next action

Next:

2.2. Live Isolation - TBD

2.3. Approve De-Isolation

After the work is complete, the ICC moves to the Approve De-Isolation stage. If the ICC is linked to a permit, this happens once the Permit Issuer closes the permit. The ICC Approver reviews the de-isolation plan to confirm it is safe and compliant before the ICC Owner can remove the isolation.

Role: ICC Approver. Platform: Web.

To approve the de-isolation, follow the steps below:

1. Navigate to **EHS** → **Isolation** from the left navigation panel.
2. Click **Total Isolations** or **Approve De-Isolation** tab.
3. Select the ICC to approve
4. Review the ICC details and confirm that it is safe to de-isolate. Check:
 - a. The linked permit is closed, and the work is complete.
 - b. Tools and materials are removed, guards and covers are back in place, and the equipment is ready to return to service.
5. Click **Submit** → **Revert** to send the ICC back to the ICC Owner if corrections or additional details are required. Enter the reason for the revert.
6. Click **Submit** to approve the de-isolation.

Figure 14-1 Approve De-Isolation

The screenshot displays the 'Approve De-Isolation' workflow in the iPermits system. At the top, a progress bar indicates the current step is 'Approve De-Iso'. The main form is for 'Test Bearing Rolling machine Isolation ICC'. It contains several input fields and sections: 'Reference type' (set to 'Other'), 'Asset Details' (including 'Function Location' and 'Equipment'), 'Risk Assessment' (with buttons for 'High', 'Medium', 'Low', and 'Very High'), 'Reason for Isolation' (with a text area containing 'Test workflow'), and 'Isolationdwdw' (set to 'Valve'). On the right, there is an 'Isolation Plan' section with an upload button and a 'Comments (0)' section.

Result

The ICC moves to the De-isolate stage and appears under the Execute De-Isolation tab. The ICC Owner is notified and can execute the de-isolation.

Next action

Next:

2.4. Review De-Isolation and Close the ICC

After the ICC Owner executes the de-isolation, the ICC Verifier confirms that it was carried out correctly before the ICC is closed.

Role: ICC Verifier. Platform: Web.

To review the de-isolation and close the ICC, follow the steps below:

1. Navigate to **EHS** → **Isolation** from the left navigation panel.
2. Click **Total Isolations** or **Review De-Isolation** tab.
3. Select the ICC to review.
4. Review the de-isolation details.
5. Click Submit to verify the de-isolation and close the ICC, and confirm the action.

Result

The ICC is closed, and its details can no longer be changed. The verification is recorded in the History tab.

VII. Part VII: Monitor and Audit

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 a Permit Extension \(on page 116\)](#) or [Review a Permit Extension Request \(on page 116\)](#).
- **Audit question:** [Review Permit History \(on page 118\)](#), [Review PPE Activity \(on page 118\)](#), or [Review Atmospheric Logs from Permit History \(on page 119\)](#).
- **Closed or rejected record:** [Access Archived Permit and JHA Records \(on page 120\)](#).
- **Low connectivity:** [Work Offline and Synchronize Permit Activity \(on page 121\)](#).
- **Unavailable action:** [Troubleshoot Permit Execution \(on page 122\)](#).

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 15-1 Permit Expiry Reports

Permit Expiry Reports					INNOVAPTIVE
1000 - Hamburg		Last 24 Hours		Last Week	Custom
Search					
☐	Shift ID	Plant ID	Expired %	Live (Expiring soon) %	Actions
☐	Mar 14, 2026 / Test Shift2 10:00 - 23:59	Hamburg	1	0	...
☐	Mar 14, 2026 / Test Shift2 10:00 - 23:59	Hamburg	1	0	...
☐	Mar 13, 2026 / Test Shift1 08:00 - 15:59	Hamburg	1	0	...
☐	Mar 13, 2026 / Test Shift1 08:00 - 15:59	Hamburg	1	0	...
☐	Mar 13, 2026 / Test Shift2 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: The responsible reviewer or issuer reviews the extension request. *(on page 116)*

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.

When a Permit Requester asks for more time on a permit, the permit status changes to Extension Requested. As the Issuer, review the request and decide whether to approve it, or reject it. You can review requests for more than one permit at the same time.

To review an extension request:

1. Open **EHS** → **Permits** and go to the My Permits tab.
2. Click the Extension Requested filter.
The list shows the permits that require extension approval.
3. Select the pending extension request permit.
4. To review more than one permit, select them from the list. Each permit opens in its own tab at the top of the screen
5. Review the current and requested validity, reason, work status, JHA, site conditions, isolations, atmospheric evidence, and conflicting work.
6. Click **Take Action**. The Permit Extension window opens.
7. Change the dates in Suggest Alternative Date and Time to allow a different end time.
8. Do one of the following:
 - Click **Approve** to approve the request.
 - To reject the request, enter the reason in the Comment box, and then click **Reject**.

Result

- If you approve, the message Permit Extension approved successfully appears, and the permit validity is updated to the new end time.
- If you reject, the banner shows Rejected request.

1.3. Review a Permit Extension Request (Mobile)

Approve or reject a request to extend the validity of a permit from your mobile device.

Role: Permit Issuer with extension approval permission. Platform: Mobile.

To review an extension request:

1. Tap My **Permits tab**.
2. Tap the **Extension Requested** tab.
The list shows the permits waiting for an extension approval.
3. Tap the pending extension request permit.

4. Tap **Take Action**.

The Extension Request Details screen opens,

5. Review the request details:

- a. **Request Reason:** Why the requester needs more time.
- b. **Current End Time:** When the permit is due to end now.
- c. **Requested End Time:** The new end time the requester asked for.
- d. **Attachments:** Any files the requester added. Tap a file to view it.

6. To allow a different end time, tap the calendar icon in **Extension End Time**, select the date and time, and tap **Confirm**.

7. Do one of the following:

- Tap **Approve** to approve the request.
- To reject the request, enter the reason in the Comment box, and then tap **Reject**.

Result

- If you approve, the message Permit Extension approved successfully appears, and the permit validity is updated to the new end time.
- If you reject, the banner shows Rejected request.

1.4. 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.

The **Contractor Acknowledge** entry in permit History is a link that opens the acknowledgement details.

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

- [Review PPE Activity \(on page 118\)](#)
- [Review Atmospheric Logs from Permit History \(on page 119\)](#)

1.5. 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. Each mobile PPE action is logged as a separate entry:
 - **PPE Verified** – user and date/time PPE was verified.
 - **PPE Skipped** – user, date/time, and skip reason, if provided.
 - **PPE Photo Captured** – user, date/time, and the captured photo.
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.

1.6. 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.

1.7. Access Archived Permit and JHA Records

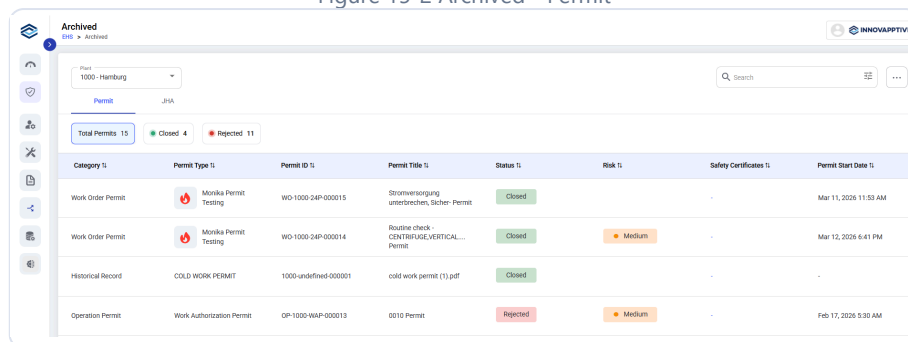
Find closed or rejected records and review the retained lifecycle and safety evidence.

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 15-2 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, 2020 11:53 AM
Work Order Permit	Monika Permit Testing	WO-1000-24P-000014	Routine check - CENTRIFUGE/VERTICAL... Permit	Closed	Medium	-	Mar 12, 2020 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, 2020 5:30 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 15-3 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 + 6 more	10008895
WO-1000-JHA-000304	broken valve JHA	Rejected	broken valve Permit	833640	0010 - broken valve + 6 more	10008895
WO-1000-JHA-000307	Routine check - CENTRIFUGE,VERTIC JHA	Closed	Routine check - CENTRIFUGE,VERTIC Permit	833613	0010 - Routine check - CENTRIFUGE,VERTICAL... + 1 more	10000938

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.

1.8. 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* in the *iMaintenance User Guide for Technicians*.

1.9. 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

VIII. Part VIII: 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, Form, or Array Field — 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- sponse 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)
Array Field	Groups a repeatable set of sub-fields (for example, multiple entries of the same set of questions) under a single field.	Add Sub Fields, Add Logic, Additional Details, Localization, Enable, Required

Table 16-1 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.

Table 16-1 Field Configuration Options (continued)

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.
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.
Add Sub Fields	Allows you to add multiple fields as sub-questions within a single Array Field, each with its own response type.

Next: [Use the selected response types when creating the permit template. \(on page 129\)](#)

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 16-1 EHS Details

The screenshot displays the 'EHS Details' configuration window. At the top, there's a header 'EHS Details' with a dropdown arrow and a count '2'. Below this, a question is configured: 'Are there any additional safety forms required for this task?'. The question has a 'YES' button and a '+1' indicator. Below the question, there are options to 'Hide', 'Logic', 'Additional Details', 'Localisation', and 'Output Data : Additional Safety Forms Required'. There are also checkboxes for 'Enable' (checked), 'Required', and 'Icon'. Below the question, there's a logic rule: 'is not YES' followed by a plus icon. Underneath, a conditional statement is shown: 'If answer is not YES then Ask Question (1)'. Below this, a field is configured: 'Select applicable additional safety forms'. The field has a 'Safety Certificate' button and a close icon. Below the field, there are options to 'Ask Question', 'Logic', 'Output Data : Safety Certificate' (checked), 'Enable' (checked), 'Required', 'Icon', and 'Allow Multi-Select' (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 16-2 Basic Permit Details

The screenshot displays the 'Basic Permit Details' configuration section. It contains a list of fields with their respective configurations:

- Permit Validity From**: Date & Time
- Permit Validity To**: Date & Time
- Risk**: High (Output Data: Risk, Enable checked)
- Crew Members**: Search Text
- PPE**: PPE
- Enter field name**: Text

Next: [create or update the permit template. \(on page 129\)](#)

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 **Template 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	◦ 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). ◦ 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). ◦ Enter a unique name in the text box for the permit template (e.g., Mechanical Work Permit).
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.  Note: Select the Acknowledgement Form for permit types that require Technicians/Contractor's acknowledgement before work execution (for example, Confined Space or Hot Work permits).
Additional Forms	Select the required additional forms from the drop-down. ◦ Contractor Form: Select to associate the required Contractor Forms with the Permit Template. ◦ Atmospheric Log: Select this option to enable the Field Validation stage during permit raise.

4. Click **Next**.

Figure 16-3 Permit Template Details

The screenshot displays a multi-step form titled "Permit Template Details". The first step, "Template Details", is active and highlighted with a blue circle and underline. The second step, "Template Configuration", and the third step, "PDF Setup", are shown as inactive with grey circles. In the top right corner, there are two buttons: a light blue "Cancel" button and a dark blue "Next" button. The form contains several input fields: a large text area for "Template Description" with the placeholder "Enter Text"; a dropdown menu for "Plant" currently showing "1000 - Hamburg"; a text input for "Tags" with the placeholder "Start typing to see tags"; and an "Acknowledgement Form" section. This section includes a list of items: "Atmospheric Logs", "Contractor", and "Surrender", each with a right-pointing chevron. Below this list is a dropdown menu with the text "Select" and an upward-pointing chevron.

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.

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

Figure 16-4 Permit Template Configuration

Back to List

Template Details Template Configuration PDF Setup

Hot permit

Preview Next

Questions

Page 4

EHS Details 1 ...

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 4 ...

EHS Details 1 ...

Basic Permit Details 4 ...

Add Section

Import

23:47 Home

EHS Details ^

Are there any additional safety forms required for this task?

YES

NO

Basic Permit Details v

EHS Details v

Basic Permit Details v

9. 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 16-5 PDF Setup

Back to List

Template Details Template Configuration PDF Setup

Cold Permit

Publish

Configuration

Select All

Summary Page

Logo

OR

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 134)*

1.4. Configure Permit List View

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

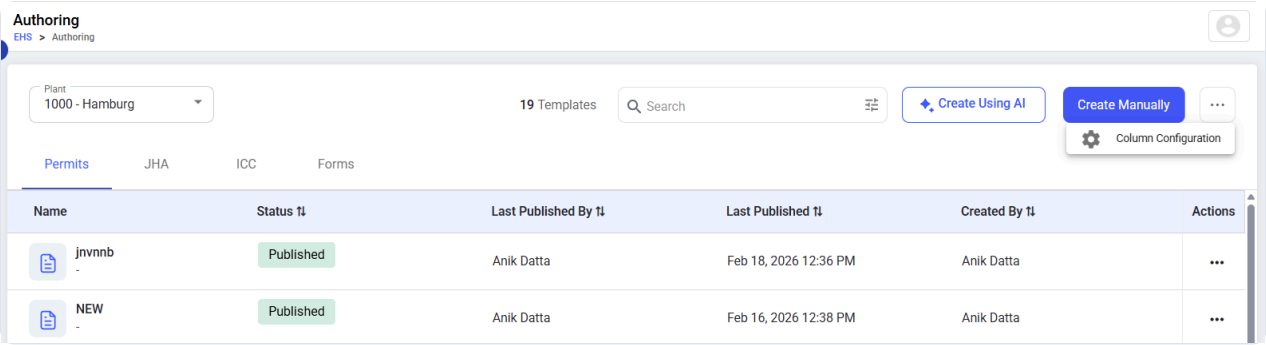
Role: iPermits Administrator or Template Author. Platform: iCWP Web.

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**.

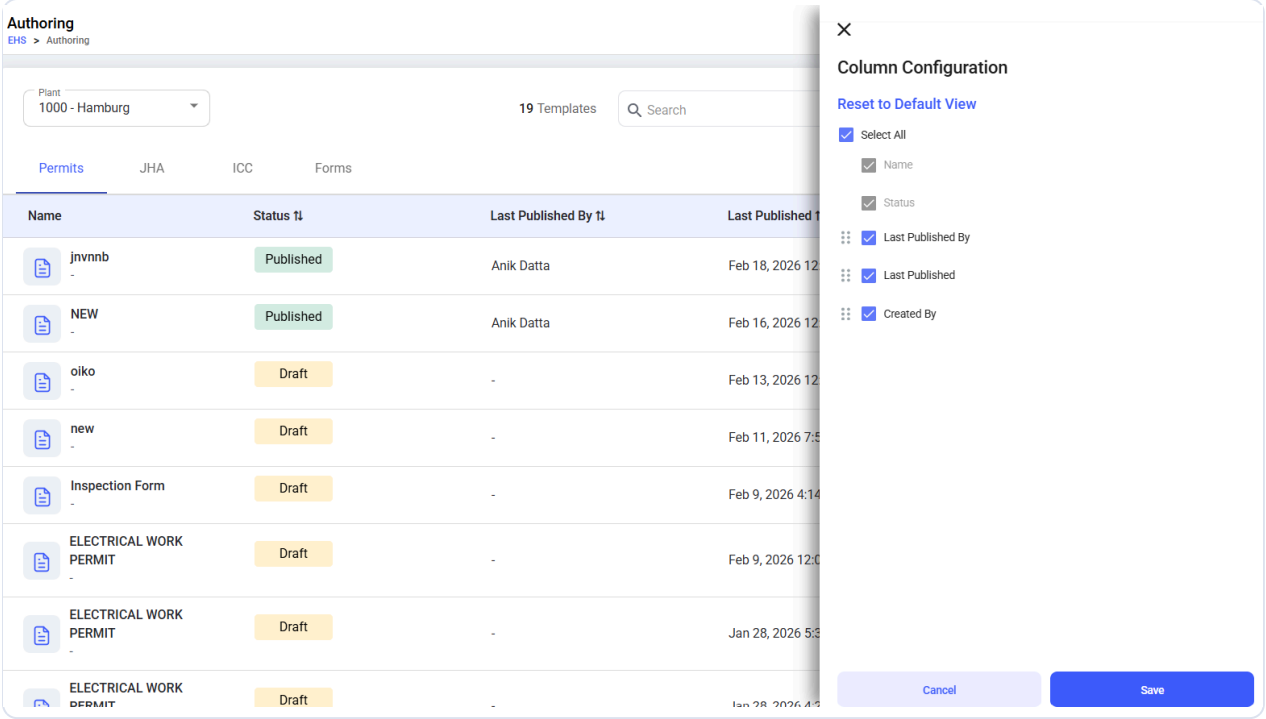
Figure 16-6 Configure Permit List



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 16-7 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 124)

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.

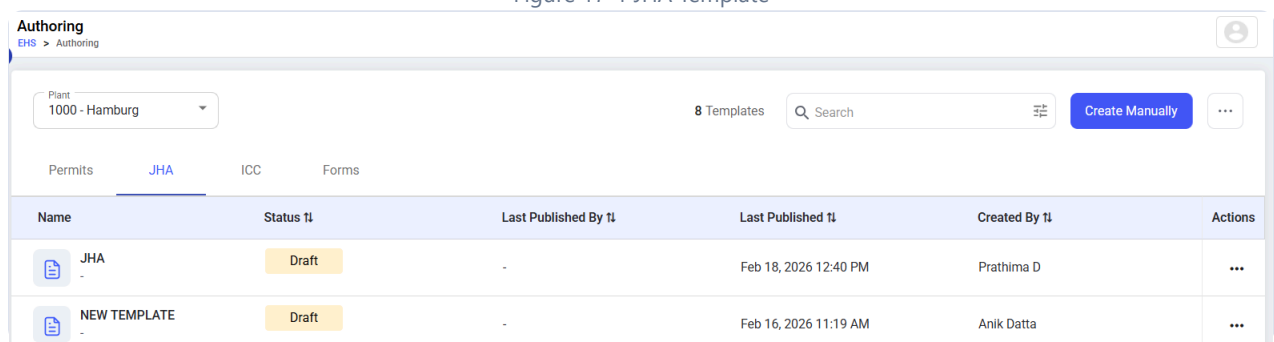
Create JHA Template:

- 1. Expand the **EHS module** and click **Template 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 17-1 JHA Template



The screenshot shows the 'Authoring' interface for JHA templates. At the top, there's a breadcrumb 'EHS > Authoring' and a user icon. Below this, a 'Plant' dropdown is set to '1000 - Hamburg'. To the right, it says '8 Templates', followed by a search bar and a 'Create Manually' button. Below the search bar are tabs for 'Permits', 'JHA' (which is selected), 'ICC', and 'Forms'. The main area contains a table with the following data:

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- 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 Forms	Select any additional forms (for example, inspection or acknowledgement forms) that must be completed along with the JHA.

5. Click **Next**.

Figure 17-2 JHA Template Details

The screenshot displays the 'JHA Template Details' screen, which is part of a three-step process. The steps are: 1. Template Details (active), 2. Template Configuration, and 3. PDF Setup. The 'Template Details' section contains the following fields:

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

At the top right of the screen, there are two buttons: 'Cancel' and 'Next'.

6. In the Template Configuration screen:

- Define the job steps in the JHA table.
- Click **Add Master Question** to add questions that apply to the entire JHA, displayed above the job step table.

Use Master Questions for checks that apply to the whole job, not to a specific step. For example, "Is a site evaluation completed for this location"? Or "Has the weather been checked and is it safe to proceed"?

The question appears once before the steps begin, so technicians answer it only once instead of repeating it for every step

Only one Master Question section can exist per JHA template.

- 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 17-3 JHA Template Configuration

j. 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 17-4 JHA Template Field Configuration

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. \(on page 139\)](#)

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. \(on page 136\)](#)

3. Design and Manage Isolation Templates

Define reusable isolation sections, fields, PDF output, and list settings before users raise isolations from the template.

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

Isolation templates define the reusable sections, fields, response types, conditional logic, and PDF output settings used when users raise isolation (ICC) records

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

3.1. Create Isolation Template

Configure and define the isolation (ICC) template with sections, fields, and PDF settings based on specific business use cases and plant requirements.

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

Create Isolation Template:

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

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

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

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

Field	Description
Tem-plate Name	Click the Hamburger icon to select an icon that visually represents the isolation type (for example, electrical, mechanical, or process isolation). Enter a unique name in the text box for the isolation template (for example, Electrical Isolation Certificate).
Tem-plate Code	Enter the required template code with 2 characters (letters/numbers). The system appends the suffix C to the code. Hover over the Info icon for more details.
Tem-plate De-scrip-tion	Describe the purpose of the template.
Plant	Select the applicable plant.
Tags	Add tags to categorize the template.

5. Click **Next**.

Figure 18-1 Isolation Template Details

The screenshot shows the 'Isolation 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 form area contains the following fields:

- Template Name:** A text input field with a hamburger menu icon on the left. The value 'Isolation Electrical' is entered.
- Template Code:** A text input field with an info icon on the right. The value 'C 0 C' is entered. Below the field, a green message states 'Code is available'.
- Template Description:** A large text area containing the text 'Isolate electrical energy sources'.
- Plant:** A dropdown menu showing '1710 - Plant 1 US'.
- Tags:** A text input field with the placeholder text 'Start typing to see tags'.

6. In the Template Configuration screen:

- a. Review the default sections. The system automatically adds the Basic Details and Isolation Plan Details sections as out-of-the-box content.



Note:

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

- b. Add the required Sections and Subsections based on the isolation template requirements.
- c. Add fields (questions) within each section as required.
- d. Select appropriate response types (Text, Number, Multiple Choice, Pick List, etc.).
- e. Click **Preview** to see how the isolation template appears in both web and mobile applications.
- f. Click **Next**.

Figure 18-2 Isolation Template Configuration

The screenshot displays the 'Isolation Template Configuration' interface. At the top, there's a navigation bar with 'Back to List', 'Template Details', 'Template Configuration' (active), and 'PDF Setup'. Below this, the 'Isolation Electrical' template is selected. The main area shows a 'Basic Details' section with the following fields:

- Validity From**: Date & Time field with a calendar icon.
- Validity To**: Date & Time field with a calendar icon.
- Risk Assessment**: A dropdown menu currently set to 'High'.
- Reason for Isolation**: A text input field.
- Isolation Method**: A dropdown menu.

At the bottom of the configuration area are buttons for '+ Add Field' and '+ Add Section'. On the right side, there are 'Preview' and 'Next' buttons. A mobile app preview on the right shows how the template will look on a mobile device, with the same fields and layout adapted for a smaller screen.

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

8. Customize what appears in the isolation PDF, such as:

- Logo positioning (On/Off).
- Custom text in the footer
- The isolation type banner with its color code and a QR code.

9. Click **Publish**.

Figure 18-3 PDF Setup

The screenshot shows the 'PDF Setup' screen for the 'Isolation Electrical' template. The top navigation bar includes a 'Back to List' link and progress indicators for 'Template Details', 'Template Configuration', and 'PDF Setup' (the current step). A 'Publish' button is in the top right corner.

The main content area is divided into two sections: 'Configuration' on the left and 'PDF setup and preview' on the right.

Configuration Section:

- Summary Page:** Includes checkboxes for 'Logo' and 'QR', both of which are checked.
- Footer:** Includes a checkbox for 'Custom Text' (checked). Below it are two input fields labeled 'Label' and 'Field'.
- Body Content:** A text area for additional content.

PDF setup and preview Section:

The preview shows the 'INNOVAPPTIVE' logo at the top. Below it is the 'ICC Title' and 'ICC ID'. The main body of the PDF is a table with the following structure:

Permit Details	JHA Details	Work Order Details	Operation Details
ICC Owner	ICC Reviewer	ICC Approver	

Result

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

Next action

Next: [Configure Isolation List View \(on page 144\)](#).

3.2. Configure Isolation List View

Select the columns users need when reviewing isolation 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 **Isolation** tab.
3. Click the **More** options (⋮) icon.
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.

Figure 18-4 Configure Isolation List

The screenshot shows the EHS Authoring interface. The main panel displays a table of isolation templates under the 'ICC' tab. The table has columns for Name, Status TL, Last Published By TL, and Last Published TL. The 'Column Configuration' panel is open on the right, showing a list of columns to be displayed. The 'Reset to Default View' link is visible at the top of the panel.

Name	Status TL	Last Published By TL	Last Published TL
Isolation Electrical Isolate electrical energy sources	Draft	-	Sep 30, 2026 10:11 AM
DUT Table ICC	Published	Anik Datta	Sep 28, 2026 3:11 PM
ICC FORM 26 September	Published	Anik Datta	Sep 28, 2026 3:12 PM

Column Configuration

Reset to Default View

- ☒ Select All
- ☒ Name
- ☒ Status
- ☒ Last Published By
- ☒ Last Published
- ☒ Created By

Result

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

Next action

Next: Create Isolation Template (*on page 141*)

4. 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: ◦ Single Instance - Only one submission of the form is allowed per permit/JHA. For example, a Signature Form or a one-time safety acknowledgement ◦ Multiple Instance - 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.

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 19-1 Create Forms Manually

Authoring

EHS > Authoring

Plant

1000 - Hamburg

11 Templates

Q Search

Create Using AI

Create Manually

Permits

JHA

ICC

Forms

Name	Status TL	Type: TL	Last Published By TL	Last Published TL	Created By TL	Actions
jsdi -	Draft	Checklist	-	Feb 18, 2026 12:50 PM	Prathima D	...
ABCD -	Published	Audit	Anik Datta	Feb 18, 2026 12:33 PM	Anik Datta	...
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- sponse Type	Description	Supported Properties
Text	Free text input (e.g., title, descriptions).	Add Logic, Default Value, Additional Details, Localization, Enable, Required, Type
Num- ber	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
Signa- ture	Captures digital signatures from users.	Additional Details, Localization, Enable, Required
Hyper- link	Clickable link to web or document resources.	Additional Details, Localization, Enable, Required, Add Link
Add 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: Link the published form to a permit template as an Acknowledgement Form or Additional Form. (*on page 129*)

4.1. 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.

Instance Type is selected in the Template Details screen when you [design and publish the form \(on page 146\)](#).