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The Permix iPad app is available to only Iowa DOT staff.

This Quick Start Guide has been developed for use with Version 1.1.68 of the Permix App and are current as of July 2019.

For assistance with Permix related questions, please contact us at <u>DOT.Permix@iowadot.us</u>.

**Note:** If you are performing weekly inspections, the below highlighted sections will likely be the most frequently used sections.

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# Permix App Settings

Before logging into and using the Permix app for the first time, check your settings.

To do this, tap the **Settings** icon from your iPad's home screen. Scroll down on the left until you can tap **IDOT Permix**. Then adjust your settings so they match those in Figure 1.

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	Settings		IDOT Permix	
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	Connect	ALLO	W IDOT PERMIX TO ACCESS	
	Docs	7	Location	Always >
×	Excel		Camera	
0	Explorer		Siri & Search Siri & Suggestions	>
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*	iMovie			
	Keynote			
	Numbers			
	OneDrive			
•	Outlook			
	Pages			
PIF	PDF Expert			
۹	PowerPoint			
×	ProjectWise			
60 N 81				

Figure 1 – Settings for IDOT Permix app

## IDOT Staff Login

Tap the Permix logo on your iPad screen. After launching the app:

- 1. Tap IDOT Staff Login (see Figure 2)
- 2. Enter your regular IDOT account Email and tap Next
- 3. Account information is remembered for the next login, so user can tap Account Email
- 4. Tap Use another account if a different account email is presented
- 5. Enter your regular IDOT account email and password and tap Sign In.



Figure 2 – Log in screens

After successful login, the project list for the user is presented on the next screen (Figure 3).

If login is unsuccessful, it may be due to the following:

- User typed the wrong password into the Iowa DOT login portal. The Iowa DOT login portal screen displays, "Incorrect user ID or password. Type the correct user ID and password, and try again."
- The user account is not set up or does not have a matching email address in Permix. The Permix login screen appears and displays, "Invalid credentials, unable to login." Contact Melissa Serio to create your Permix account.

# Project List and General Navigation Information

A list of projects assigned to the user logged into Permix displays on the Projects list screen (Figure 3).

- 1. To refresh list, press and pull-down grey bar with "Contract ID#, Project Number, etc."
- 2. Press and drag a finger to scroll up and down the project list
- 3. Tap a project row one time to select the project

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🗙 Logout		Pr	ojects							
Contract ID#	Project Number	County	Work Type	District/RCE Office	Status					
16-Jan-2018	01162018 Project Test	00-Test	System Testing		Construction	>				
16-Jan-2018	01232018 Project Test	Ames	System Testing		Construction	>				
92-0014-050	BRF-001-4(50)38-92	Washington	Bridge Replacement- PPCB		Construction	>				
44-2182-142	BRF-218-2(142)38-44	Henry	Bridge Replacement- PPCB		Construction	>				
01-0253-029	BRFN-025-3(29)39-01	Adair	Bridge Replacement- PPCB		Construction	>				
78-0293-171	IM-NHS-029-3(171)4803-78	Pottawattamie	PCC Pavement - Grade and New		Not Started	>				
97-0297-050	IM-NHS-029-7(50)14903-97	Woodbury	PCC Pavement - Grade and Replace		Construction	>				

#### Figure 3 – Projects list

After selecting a project, the user can navigate to any of the project screens using the icons at the bottom of each screen.

#### Icons

The Icon tray (Figure 4) is located at the bottom of the screen. Tap each icon to navigate to that screen for the project.

- 1. BMPs: Access a list and map of all Best Management Practices (BMPs) added to the project
- 2. Actions: List of all Unresolved Actions created for the project. This is the project's to-do list.
- 3. **Observations**: List of all Unacknowledged Observations created for the project by the QA inspector.

- 4. **Inspections**: List of all completed and pending inspections created for the project.
- 5. Info: Informative details and assignments for the project.

BMPs Actions Actions (j) Info
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Figure 4 – Icon tray

The active icon is blue for the screen displayed, while the other icons are grey.

Someone primarily performing weekly inspections will likely spend most of their time in the **Actions** and **Inspections** screens.

What if I don't see my projects?

- The initial sync may take 10-15 minutes. Keep the app open as this data syncs to your app.
- In some cases, the app may need to be force closed and reopened again.
- As a last resort, your Office Administrator can verify if you are assigned to the project or you may contact <u>DOT.Permix@iowadot.us</u> for assistance.

## Erosion & Sediment Control BMPs

A list of Erosion and Sediment Control Best Management Practices (BMPs) added to the project will display on the Project BMPs List screen (Figure 5). Please note that it is not required to enter all BMPs installed on a project. Instead, the Permix system allows inspectors to focus on just the deficiency/"to-do" items by using the Actions screen (go to **Actions List** section of this user guide).

- 1. Press and drag a finger to scroll up and down the project list
- 2. Tap the + button one time in the screen header to add a New BMP record
- 3. Tap a BMP row one time to navigate from the Project BMPs list screen to the Edit BMP screen

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< Proje	cts	Project BMPs			Add New	вмр 🛶	• (+)
Project	t Number: T1		Contract	t ID: T	BMP Map		
W	/ork Type: ditching		Cou	nty: Ada	ms		
	Location: Northwest Part of County		Sta	tus: Clos	ure Pending	View	-
Action Status	ВМР Туре	Road Segment	Beginning Station	Side	Install Status	BMP Install Date	Y
•	(LINEAR FEET ITEM)	Victoria Street	1	L	Pending Install	2018-01-18	$\odot$
	SILT DIKES	Hollywood Boule	1+00	L	Pending Install	2018-01-16	>
	TOPSOIL STRIP & STOCKPILE	1-64	1+100	R	Installed	2018-01-05	>
•	NATIVE GRASS SEEDING	Easy Street	1+500	R	Installed	2018-01-05	>
	SILT FENCE	Easy Street	1150	L	Pending Install	2018-01-16	>
	(GALLONS ITEM)	Hollywood Boule	123	М	In design		>
	TOPSOIL SPREAD	Easy Street	123	L	In design		>
•	TOPSOIL SPREAD	Hollywood Boule	123	R	Installed	2017-09-29	>
	REVETMENT, CLASS E	Easy Street	12322	L	Installed	2017-12-14	>
	SILT FENCE	Easy Street	125+00	L	Installed	2018-01-20	>
	EROSION STONE	Victoria Street	2+90	R	Installed	2018-01-05	>
	MULCHING	1-64	234	R	Installed	2017-12-14	>
	BMPs Actions		encies	117	Inspections	(j) Info	

Figure 5 – BMPs screen

#### **BMP List Columns**

- **Action Status**: A simple color beacon displays if the BMP record has any pending findings and how long they have been pending.
  - **Green** = no findings pending.
  - Yellow = findings pending 7 days or less.
  - Red = findings pending more than 7 days.
- Install Date: The first installation date of the BMP at that location

#### Adding a new BMP:

- 1. Complete all required (\*) information. Items without \* are optional.
- 2. Tap **Save** when information is correctly entered
- 3. Tap Cancel to stop editing a new BMP and return to the Project BMPs screen

### New BMP screen fields

2:50 PM Fri Jul 19			ull 🗢 <b>7</b> 1	4% 🚺
New BMP				
BMP Type*				
Use Type	Temporary			
Units		Side*		
Road Segment*				
Begin Station*				
End Station				
Comments				
		Save	Cancel	
Record date: 2019-07-19				

#### Figure 6 – Adding a New BMP screen

- **BMP Type**\*: *Type* any word or number to start your search and tap to select your BMP type.
- **Use Type**: *Tap* the toggle to switch from Temporary to Permanent due to how BMP will be used. Default is on "Temporary"
  - Example of Temporary = Silt Fence
  - Example of Permanent = Native Grass Seeding
- Units: Read only field. Displays the default units for the selected BMP
- Side\*: Scroll to the side of the roadway associated with the BMP location
- **Road Segment\***: *Scroll* to the roadway best associated with the BMP location. If nothing is available or if the road you want to enter is not available, see "Adding Road Segment" Section in this user guide for assistance.
- **Beginning Station\***: *Type* the station that best represents the beginning of a BMP installation
- Ending Station: *Type* the station that best represents the end of a BMP installation

- **Comments**: *Type* additional comments helpful to describe the BMP record

#### **Adding Road Segment**

Tap icon on the right of the screen (see Figure 6). A new Road Segments screen will open (Figure 7).

Tap **Add Road Segment** and then enter the road or ramp name in the "New Road Segment" blank. After entering the new road, you will be able to tap **Save**.

1:47 PM Tue Jul 23		uli 🗢 1 73% 🔳
Road Segm	ents	
Enabled	Road name Add Road Segment	
	New Road Segment	
	Another road	
	Example Road 1	
	Example Road 2	
	M.M 219.10, I-80	
	Test ramp c	
	Virginia Street Ramp	
	new road segment	
	Save Cancel	

Figure 7 – Adding a new Road Segment screen

#### **BMP Finding List Columns**

After a BMP is created, all entries (also called findings) display together on the Edit BMP screen (Figure 8).

- 1. To see more findings, press and drag a finger to scroll up and down the findings list. Findings list is on the left.
- 2. To open a finding, tap a finding row one time and system will navigate from the **Edit BMP** screen to the **Edit Finding** screen

For Permix related questions: Iowa Department of Transportation

Т	his is project's	BMP						
fi	ndings list.			Edit BMP				
+ New Actio	on 💙 + New	QA Observation						
Finding Date	Action Type	Status		BMP Type*	2602-0000020,	SILT FENCE		
2019-07-15	Install	Pending	>	Use Type	Temporary			
2019-05-30	Maintain	Resolved	>	Units	LF		Side*	Median
2019-04-21	Install	Resolved	>	Road Segment*	Example Road 2			
2018-10-31	Install	Pending	>	Begin Station*	1			
2018-06-12	Remove	Resolved	>	End Station				
2018-06-12	Maintain	Resolved	>	Comments				
2018-05-24	Install	Acknowledged	>					
Sioux City		Waterloo	que					
	TOWA	Codar Rapids	Rockfe					
iaha-	SILT DITCHES	Ottumwa	1. 1					
neoln		Pe	oria				Save	Cancel
Record date: 2	2019-07-19							

Figure 8 – BMP findings list on Edit BMP screen

- **Action Status** column: A color circle displays if the BMP record has any pending findings and how long they have been pending.
  - Green Circle = Action Item is resolved.
  - • Yellow Circle = Action Item pending 7 days or less.
  - Red Circle = Action Item pending more than 7 days.
  - A Yellow Triangle = QA Observation item that is pending or acknowledged.
- Finding Date: Date the entry was added to Permix
- Action Type: Install, Maintain, Remove, Document/Other
- Status: Action Items are Pending or Resolved. QA Observations are Pending or Acknowledged.

You must have the correct privilege settings to view the + New Action or + New QA Observation buttons (Figure 9).

To start a new Action or QA Observation entry:

- 1. For weekly inspections, tap + New Action to open the Action & Resolution screen
- 2. For QA Inspections, tap + New QA Observation to open the QA Observation screen



Figure 9 – New Action or New QA Observation on Edit BMP screen

For additional instructions on New Actions or New QA Observations, go to **Actions List** and **QA Observations List** sections of this user guide.

## BMP Map

From the map, most projects display a project boundary defined by IDOT. If IDOT does not have project limits, the map view defaults to County of the project. Records that have been mapped display as regular text. Records that have not been mapped but have been added from list view are listed as bold text.

#### Map Navigation

- You can switch views between the map view II and list view i in top right corner just above the map. See Figure 10 for map view screen.
- Press and drag the map display to move around. Use two finger pinch/expand to zoom in/out
- Press and drag a finger to scroll up and down the list in the left panel
- Tap a record in the left panel to have the BMP Map move to that record's location.



Figure 10 – BMP map view screen

#### Adding a new BMP to the map:

- 1. Tap the + New BMP button (See Figure 11)
- 2. Tap a map location to add a new BMP record to the BMP Map.
- 3. The app will open the Edit BMP screen to provide the details of the BMP.



Note: You can move the BMP location after adding it by taping it and pressing to drag it.

Figure 11 – Adding a New BMP to the map

#### Adding an existing BMP to the Map

- 1. Unmapped BMPs appear as **Bold Italic** text as shown below
- 2. Tap a record in the left panel
- 3. The +New BMP button will change to Map BMP



4. Tap Map BMP button

5. The Map BMP button will change to Tap map to set location shown below



- 6. Now, tap the map to set the BMP location.
- 7. To see BMP details, tap the flag or dot (like below screenshot) which will render the popup details.
  - Tap the information icon (1) to view **Edit BMP** screen.

and they	STABILIZE CROP - SEED & FERTILIZE
	Use Type: Temporary
	Road Segment: I80 EB Exit 144
-	Beg Station: 800
1	End Station:
14:10	Side: R
1	T/A Install Date: 04/10/2018
	Install status: Pending Install
and the	Comments:
	Created: 04/11/2018
1000	Satisfied: no
No. N	Deleted: no
	ENCONORMANTE

#### Project BMP Map Columns

- Action Status: A simple color pin displays if the BMP record has any pending findings and how long they have been pending.
  - **Green** pin = no findings pending.
  - Yellow pin = findings pending 7 days or less.
  - Red pin = findings pending more than 7 days.
- Beginning Station: The targeted or actual first installation date of the BMP at that location
- Side: The targeted or actual first installation date of the BMP at that location

#### Editing a BMP from the Map.

From the Map, an existing BMP may be edited on the Edit BMP screen (Figure 12).

- 1. Edits are allowed on the iPad for Station, Date and Comments.
- 2. Tap **Save** when all information is correctly updated.
- 3. Tap Cancel to stop editing a BMP and return to the Project BMPs screen

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1 F	Fri Jul 19								ull <del>?</del> 7
					Edit BMP				
	+ New Actio	n + New	QA Observation						
	Finding Date	Action Type	Status		BMP Type*	2602-0000020,	SILT FENCE		
)	2019-07-15	Install	Pending	>	Use Type	Temporary			
	2019-05-30	Maintain	Resolved	>	Units	LF		Side*	Median
	2019-04-21	Install	Resolved	>	Road Segment*	Example Road 2			
	2018-10-31	Install	Pending	>	Begin Station*	1			
	2018-06-12	Remove	Resolved	>	End Station				
	2018-06-12	Maintain	Resolved	>	Commonto				
	2018-05-24	Install	Acknowledged	>	Comments				
なんで			1. 2000						
1	Sioux City	4	Waterloo	Janesv					
k		IOWA	Cedar Rapids	Rockfe					
Dm	naha-	SILT DITCHES	Davenport						
u	ncoln		Ottumwa Po	oria				Save	Cancel
R	ecord date: 2	019-07-19							

Figure 12 – Editing a BMP

Fields highlighted in yellow above can be edited on the Edit BMP screen fields after it is created. The inset map view is for **reference only**. The target BMP record will display if mapped. All other BMPs within the view display a grey map pin instead of the green/yellow/red of the target BMP. You cannot modify unmapped BMPs from this screen or adjust project location from this screen.

## **Actions** List

After an Action Item is created, it displays on the Unresolved Actions screen (Figure 13) until it is resolved.

- 1. The number displayed with the Actions icon indicates how many Unresolved Actions are included in the list
- 2. Records with oldest due dates are presented at the top of the list
- 3. Press and hold a finger to scroll up and down the project list

On this screen, you may:

- 1. *Tap* + to create a new Action Item
- 2. Tap Update to perform updates on multiple Action Items at one time
- 3. *Tap* a row one time to navigate from the **Unresolved Actions** screen to either resolve one action at a time or to edit action information (such as due date).

3:59 PM	To Create a New Action (i.e. corrective "II ? 1 30% 🕢 Projects Unresolved Actions, action, to-do list item, deficiency, etc.)									
PIO	Jecis		Onresolved Activ		list item, at	inclosey	,,			
Proje	ct Number: (	01162018 Project Test	(	Contract ID: 16-Jan-2	2018	-0	Update			
Work Type: System Testing				County: 00-Test		Bull				
	Location: 1	This is a test project used fo	or system validation testing a	Status: Construc	ction					
Actior Status	a Quantity	ВМР Туре	Action Type	Road Segment	Beginning Station	Side	Due Date			
		Other, Dewatering	Document/Other	Example Road 1	1	Left	2019-02-19	>		
	100	SILT FENCE	Install	Example Road 2	1	Medi	2018-11-07	>		
		SILT FENCE	Install	Example Road 2	1	Medi	2019-07-22	>		
		SILT FENCE	Maintain	Another road	123	Right	2019-07-22	>		
		SILT FENCE	Maintain	Another road	123	Left	2019-07-22	>		
		SILT FENCE	Remove	Example Road 1	1234	Right	2019-07-22	>		
	500	SILT FENCE	Maintain	Example Road 1	250+00	Medi	(	0		
							Single Edits	Û		
		MPc		Ę	nenectione					
	Б	MPs Contraction Action	tions <u>\</u> Observations		nspections		Single Edits			

Figure 13 – Unresolved Actions screen

#### **Unresolved Actions List Columns**

- Action Status: A simple color and beacon displays how long Action Items have been pending
  - -= Action Item pending 7 days or less.
  - •= Action Item pending more than 7 days.
- **Quantity**: Optional field. The recommended quantity entered by the inspector when the Action Item was saved.
- Action Type: Options include Install, Maintain, Remove, Document/Other
- **Due Date**: Date the Finding record is due
  - Due date is blank until it is added to a Weekly Inspection report
  - Adjusted due dates display as Due Date, beacon color is based on original due date

#### Adding New Action

After tapping the + from the previous screen, the below screen (Figure 14) will open. Fill in the highlighted cells. If the Road Segment best associated with the BMP location is not available, see **Adding Road Segment** section in this user guide for assistance.

Then tap + New Action in the upper left of the screen.

32 AM Tue	Jul 23					ul Ș 1	96% 🔳
		S	earch BMP & Add A	ction			
0	+ New Action						
BMP:	$\smile$		BMP Type*	2602-0000050, SILT BASI	N		
Side	Road Segment	Begin Station	Use Type	Temporary			
			Units	EACH	Side*	Right	
			Road Segment*	Example Road 1			
			Begin Station*	1234			
				Fill in highlighted cell tap "+ New Action" in left of screen	s. Then upper		
Rec	ord date: 2019-07-23					Cancel	
5 0	- D	"1234"					$\sim$



The Action & Resolution screen (Figure 15) will open.

#### Fields for Action & Resolution.

- 1. Fill in the required highlighted items.
  - **Action Type**: Required field. *Tap* then *Scroll* to the action required. Default Action Type is Install, but may be changed to Maintain, Remove, Documentation/Other.
  - Unit: Read Only displays information related to BMP and Action
  - **Estimated Quantity**: Optional field. *Tap* then *Type* estimated quantity anticipated **Description**: Optional field. *Tap* then *Type* details useful for understanding or completing the deficiency.
  - **Camera**: Optional field. *Tap* the toggle to switch between Camera and selecting pictures from Camera roll
  - **Pictures**: Optional field. *Tap* window to add up to six images. *Tap* then *Type* captions below each image.
- 2. Tap **Save** when information is correctly entered
- 3. Tap **Cancel** to stop editing a new finding and return to the Edit BMP screen

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		Action & Resolution		Cancel
ВМР	SILT FENCE	Segment: Example Road 2	Begin Static	<b>n:</b> 1
Action				
Action Type:		(Prop No.) Line Number: N/A	Item Numbe	er: N/A
Recommended Quantity:				
Unit:	LF			
Description:				
Pictures:				
Camera				

Figure 15 - Adding a New Action by entering Action Type (i.e. Install, Maintain, Remove, Other)

### Editing an Action Item

An existing Action Item may be edited by updating select information on the **Action & Resolution** screen (Figure 16).

- 1. Existing Action details may be edited for Description and Adjusted Due Date
- 2. Tap **Save** when all information is correctly updated.
- 3. Tap Cancel to stop editing an Action Item finding and return to the Edit BMP screen

Verizon 🐨		10:02 PM Action & Resolution	⊂ \$ 100% ■
Action			Cancel
Action Type:	Install	(Prop No.) Line Number: N/A	Item Number: 2601-2636015
Recommended Quantity:	2000		
Unit:	ACRE		
Description:	Add more seeding		
Report Date:	2018-01-06	Adjusted Due Date:	
Notification Date:	2018-01-06	Reason for date adjustment:	
Due Date:	2018-01-13		

Figure 16 – Editing Action information

Edit appropriate fields highlighted in yellow in above image and click save to update the entry.

- Action Type, Line Number, Item Number, Recommended Quantity, Units, Report Date, Notification Date & Due Date: *Read Only*
- **Description**: *Tap* then *Type* text to amend or supplement the existing description
- Adjusted Due Date: *Tap* then *Select* new calendar due date for contractor to complete Action by
- **Reason for date adjustment**: *Tap* and *Scroll* to the appropriate justification for the adjustment

### Resolving/Completing an Action Item – Single Edits

An existing Action Item may be resolved (i.e. completed) by updating select information on the **Action & Resolution** screen. To resolve a single action, select an action from the **Unresolved Actions** screen (Figure 13).

Complete Resolution Section (see Figure 17) and tap Save to update the entry.

- Action Resolved (required): *Tap* then *Scroll* to the action taken to resolve Action Item (Install, Maintain, Remove, Documentation/Other)
- Line Number, Item Number & Unit: Read Only displays information related to Action selected
- Steps taken to Resolve: Tap and Type text describing steps taken to resolve Action Item
- **Date Resolved**: *Tap* then *Select* calendar date that action item was resolved or verified to be resolved (whichever is most accurate).
  - o Date value populates as current date by default when Action Type is selected

- Date may be modified to a previous date if desired; however, date may not be modified to a future date
- Camera: Tap the toggle to switch between Camera and selecting pictures from Camera roll
- **Pictures**: *Tap* the window to add up to three images. *Type* image captions below each image.



Figure 17 – Resolving Action screen

### Resolving/Completing an Action Item – Bulk Updates

The **Actions** screen includes a bulk Update feature (see Figure 14) that will allow you to edit Action entries at one time.

- 1. The **Update** button is located on right side of the Project description header
- 2. Bulk updates do not allow comments about steps taken to resolve finding, comments and resolution image.
- 3. *Tap* **Update** to activate the bulk update function. After tapping Update, you will still be on Unresolved Actions screen, but new entry items will be available (see Figure 18).
- 4. *Tap* then *Scroll* to select a common **Action** taken to resolve action items, such as install, maintain, or remove.
- 5. *Tap* on Date then *Select* calendar date Action was taken or confirmed resolved then *Tap* Done
- 6. Tap each record that the Action and resolution date apply to
- 7. Tap Quantity of the Action record to provide actual quantity completed as optional information
- 8. Tap Save to record the bulk update for selected records
- 9. *Tap* **Cancel** to abort the bulk update

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Atl Veriz	on ♥ ⇒ ojects		Un	12:51 PM resolved Actions	Select a	ction,	date	\$ 27% ► +
Proje Action Statu:	ect Number: T1 Work Type: ditchin Location: Northw	ig vestors of County P Type	Select reco update and optional qu provided	ords to Contra I type the Contra I type the South Sout	arru Circr act ID: T bunty: Adams itatus: Construction Begi bad Segment Sta	nning tion Si	Action: n Date:	Save Cance
0	5	REVETMENT, CLAS	SS E	Install	Easy Street	12322	Left	2018-01-13
0	•	TOPSOIL STRIP &	STOCKPILE	Document/Other	1-64	1+100	Right	2018-01-13
0	$\bullet$	NATIVE GRASS SE	EDING	install	Easy Street	1+500	Right	2018-01-13
	1234	WETLAND GRASS	SEEDING	Install	1-64	234	Right	2018-01-13
	876	FERTILIZING		install	Hollywood Boule	300	Left	2018-01-14
	•	WETLAND GRASS	SEEDING	Install	1-64	234	Right	2018-01-17
	•	TOPSOIL SPREAD		Remove	Hollywood Boule	123	Right	2018-01-19
	•	SEEDING & FERTIL	IZE	Document/Other	1-64	5+00	Right	2018-01-19
	•	PERIMETER AND S	LOPE SEDIMENT CO	install	Victoria Street	90	Right	
		BMPs	Actions	Deficiencies In	apections info			

Figure 18 – Resolving multiple Actions using bulk update feature

## QA Observations List

Quality Assurance (QA) observations are made by an individual performing QA inspections. After a QA Observation is created, it displays on the **Pending QA Observations** screen (Figure 19) until it is acknowledged. Acknowledgement is made by the inspector performing the weekly inspections and is discussed later in this section.

- 1. The number displayed with the Observations icon indicates how many pending QA Observations are included in the list
- 2. Records with oldest due dates are presented at the top of the list
- 3. Press and hold a finger to scroll up and down the project list

On this screen (Figure 19), you may:

- 1. *Tap* + to create a new QA Observation
- 2. *Tap* a row one time to navigate from the **Pending QA Observations** screen to either acknowledge one QA observation at a time.

11:25 AM	Tue Jul 23						ull 🗢 <b>7</b> 82	% 🔳
Proje	ects		Pending (	QA Observations				+
Projec	t Number:	01162018 Project Test		Contract	ID: 16-Jan-201	18		
v	Vork Type:	System Testing		Coun	ty: 00-Test			
	Location:	This is a test project used for s	ystem validation testing	ga Statu	us: Constructio	on		
	BMP Type		Action Type	Road Segment	Beginning Station	Side	Description	
$\bigwedge$	SILT FENC	E	Remove	Example Road 1	1234	Right		>
<u>_!</u>	SILT BASII	N	Install	Example Road 2	345	Left		>
		-0						
	E	BMPs Action	ns 🕂	Observations	Ins	pections	(j) Info	

#### Figure 19 – Pending QA Observation screen

#### Pending QA Observation List Columns.

- Observation Icon: A yellow warning triangle is used to indicate the BMP observation
- Action Type: Options include Install, Maintain, Remove, Document/Other

- **Description**: Comments recorded to describe the observation

#### Creating a QA Observation.

After tapping the + on Figure 19, the QA Observation screen (Figure 20) will pop-up.

3:25 PM Fri Jul 19				uli 🗢 7 23% 🗗
		<b>QA Observation</b>		
				Cancel
ВМР	SILT FENCE	Segment: Example Roa	ad 2 Begin Station	: 1
Observation				
Action Type:	Install	(Prop No.) Line Number: N/A	ltem Number	: 2602-0000020
Estimated Quantity:				
Unit:	LF			
Description:				
Pictures: Camera				

Figure 20 – QA Observation screen

- Action Type: Required field. *Tap* then *Scroll* to the action required (or recommended for QA Observations). Default Action Type is Install, but may be changed to Maintain, Remove, Documentation/Other.
- Unit: Read Only displays information related to BMP and Action
- **Estimated Quantity**: Optional field. *Tap* then *Type* estimated quantity anticipated **Description**: Optional field. *Tap* then *Type* details useful for understanding or completing the finding
- **Camera**: Optional field. *Tap* the toggle to switch between Camera and selecting pictures from Camera roll
- **Pictures**: Optional field. *Tap* window to add up to six images. *Tap* then *Type* captions below each image.
- 4. Tap Save when information is correctly entered
- 5. Tap Cancel to stop editing a new finding and return to the Edit BMP screen

#### Editing or Acknowledging a QA Observation

From the **QA Observation** screen (Figure 21), you may:

- 1. Update the QA Observation Description field (yellow highlighted below)
- 2. Add Acknowledgement details (red notes shown below)
- 3. When information is correctly updated, tap **Save** (it will appear blue when correctly updated)
- 4. Tap Cancel to stop editing an Observation finding and return to the Edit BMP screen

📶 Verizon 🗢		10:19 AM		1 79% 🔳)
		QA Observation		
			Save	Cancel
BMP	SILT FENCE			
Observation				
Observation		(Prop No.)		
Action Type:	Install	Line Number: N/A	Item Numb	per: 2602-0000020
Estimated Quantity:				
Unit:	LF			
Description:	Original value not accepted	d. Edit it again		
Report Date:				
Notification Date:				
Acknowledge	Observation	o here and a roller selector appears for yo select "Accept or Dismiss"	u	
Acknowledgement:	Pending			
		Add comments to clarify re Acknowledgment selected.	ason for	
Comments:		K		

Figure 21 – Area to edit QA Observation or Acknowledge QA Observation

#### Fields for updating or acknowledging a QA Observation

- Action Type, Line Number, Item Number, Estimated Quantity, Units, Report Date & Notification Date: *Read Only* displays information related to Observation
- Description: Tap and Type text to amend or supplement the existing description

- **Acknowledgement**: *Tap* then *Scroll* to select the appropriate acknowledgement type (Accept or Dismiss). Pending (default) is displayed until the observation is acknowledged.
  - If Accepted: The QA Observation will show as acknowledged on the next QA Inspection report and Permix will generate a new Action item using the details from the QA Observation record
  - If Dismissed: The QA Observation will show as acknowledged on the next QA Inspection report and Permix <u>will not</u> generate an Action item. Reason for dismissal must be selected.
- **Comments**: *Tap* and *Type* text describing additional information that supports the decision to accept or dismiss the observation

## **Inspection Reports**

A list of Inspections completed for the project display on the Inspections screen (Figure 22).

- 1. Press and hold a finger to scroll up and down the project list
- 2. Tap the + button one time in the screen header to begin a New Inspection record
- 3. Tap *Completed* inspection rows one time to navigate from the **Inspections** screen to **View Inspection** screen
- 4. Tap *Pending* inspection rows on one time to navigate from the **Inspections** screen to **Edit Inspection** screen

<u>All action items should be done/updated prior to starting a weekly inspection report. This</u> <u>cannot be done within the inspection report.</u> Refer to **Actions List** section of this user guide for how to resolve or complete an action item.

🖬 Verizon 👻		10:56 PM		L * 841
Projects		Inspections	Begin new inspe	
Project Number: T1		Con	tract ID: T	Status: Construction
Work Type: ditching			County: Adams	
Location: Northwest Part of County			Open com	plete or 👝
			pending in	spection 🔨 🔪
Project Number(s)	Inspection Status	Inspection Date	Inspector	Inspection Type
T1, O'Martin T3	Complete	2018-01-12	Maggie Jones	Weekly
т	Complete	2018-01-12	Maggie Jones	Weekly >
T1, O'Martin T6, O'Martin T3	Complete	2018-01-12	Maggie Jones	Quality Assurance
т	Complete	2018-01-12	Maggie Jones	Quality Assurance
т	Complete	2018-01-09	Maggie Jones	Weekly >
т	Complete	2018-01-09	Maggie Jones	Weekly >
ті	Complete	2018-01-08	Maggie Jones	Weekly >
т	Complete	2018-01-08	Is Consultant RCE Fo	Weekly >
BMPs	Actions	Deficiencies	Inspections info	

Figure 22: Inspection list screen

#### **Inspection List Columns**

- **Project Number(s)**: The project number of each project included in the inspection report
- Inspection Status: Complete or Pending. Pending inspections have not been filed.

- Inspection Date: Date (selected by inspector) inspection was conducted
- Inspector: Permix user that completed and filed the inspection report
- Inspection Type: Weekly or Quality Assurance

#### Starting an Inspection Report

After selecting + on Figure 22 to start an inspection report, a new screen will open to enter Inspection Information (Figure 23).

- 1. An Inspection Date/Time and Inspection Type are required, and multiple projects can be included on the same inspection report
- 2. Tap **Create Draft** to open the Inspection Report for editing
- 3. Tap Cancel to stop creating a new Inspection Report and return to the Inspection screen

HI Verizon 🗢 ඊ	11:18 PM	C 🕏 83% 🔳)
Projects	Inspections	+
N	ew Inspection	
Inspection Information		
Inspection Date: 01/15/2018 11:17 PM Inspection Type: Weekly	Project: T1 Additional projects included with this inspection Report:	
Pick date/time the inspection was conducted and the type of inspection	<ul> <li>C'Martin T6</li> <li>D'Martin T3</li> </ul>	
Select all the projects to include in the inspection report		
Click Create Draft to start the inspection report	raft Cancel	
EMPs Actions	Deficiencies imapections info	

Figure 23 – New inspection information screen

- **Inspection Date**: *Tap* then *Scroll* to the select the date and time the inspection was conducted in the field
  - Defaults to date/time the New Inspection screen was accessed
  - o Selected values cannot be changed after the Draft is created
- Inspection Type: *Tap* then *Scroll* to select Inspection type (Weekly or QA)

- Project: Read Only displays Project the user is starting the Inspection Report for
- **Additional projects included with this Inspection Report**: *Tap* all projects affiliated with the same contract to include with the Inspection Report
  - o Default enables all projects on a contract for which user can conduct selected Inspection
  - User may uncheck any project except for the main project the Inspection Report is for

#### **Completing Inspection Information**

After tapping **Create Draft** as shown on Figure 23, a new screen (Figure 24) will open momentarily to add additional Inspection Information.

📶 Verizon 😴 🔅		11:30 PM			L 🕏 81% 🔳 ·
Inspection Information					
Inspection Date	01/15/2018 11:20 PM		Inspection Type:	Weekly	
Included Projects					
	T1, O'Martin T6, O'Martin T3				
Inspection made by	Maggie Jones				
Contractor representative	Is Company User One For O'Martin	1			
Other project personnel present	Is IDOT Inspector For O'Martin				
	Is RCE Designee For O'Martin				
	Test Permix1				
Others Present	Add other users that were on site				
Inspection Day Weather	Sunny, 79, rain in the forecast				
Date of Most Recent Precipitation					
Since Last Inspection (Leave Blank if None)	01/13/2018	Amount (Inches) T	That Fell 0.35		
Describe Additional Precipitation That Fell Since Last Inspection. Provide Date (DD/MM/YY), Amount (#,###), Duration (In Hours) And Discharge (Y/N)	None				
Description of Current Construction Activity	Bridge construction				
Scope of Inspection	all disturbed areas	all discharge	points		
	all entrance/exit locations	all storage ar	reas		

Figure 24 – Completing Inspection Information screen

- Inspection Date, Inspection Type, Included Projects: *Read Only* displays information related to Inspection Report
- **Inspection made by**: *Tap* then *Scroll* to select the Permix user that led the project inspection
- **Contractor representative**: *Tap* then *Scroll* to select the Permix user that participated in the inspection representing the Prime Contractor company

- **Other project personnel present**: *Tap* and *Scroll* to select up to three additional Permix Users that participated in the inspection
- **Others Present**: *Tap* then *Type* to record names of other **non**-Permix Users that were present
- **Inspection Day Weather**: *Tap* then *Type* to provide simple weather description
- **Date of Most Recent Precipitation Since Last Inspection**: *Tap* then *Select* calendar date that precipitation occurred during the period or leave blank
- **Amount**: *Tap* then *Type* to record the inches of precipitation that occurred during the period
- **Describe Additional Precipitation That Fell Since Last Inspection**: *Tap* then *Type* to describe precipitation (supplemental information is helpful during particularly raining periods and actions remain unresolved for extended time)
- Description of Current Construction Activity: Tap then Type to describe activity
- **Scope of Inspection**: *Tap* the toggle to include all (default) or exclude each scope option

#### Reviewing Unresolved Actions and Action Items Resolved

<u>All action items should be done/updated prior to starting a weekly inspection report. This</u> <u>cannot be done within the inspection report.</u> So, this next portion of the inspection report is readonly.

Unresolved Actions at Time	e of Inspectio	n	(6)			
# BMP Type	Beg. Sta.	Side	Recorded By	Action Type	Report Date	Due Date
1 TOPSOIL STRIP & STOCKPILE	1+100	R	Maggie Jones	Document/Other	01/06/2018	01/13/2018
Action Required / Inspector Comm	ient					
This BMP is not specified bid item						
# BMP Type	Beg. Sta.	Side	Recorded By	Action Type	Report Date	Due Date
2 NATIVE GRASS SEEDING	1+500	R	Maggie Jones	Install	Now	*
Action Items Resolved Sind	ce Last Inspec	tion	(3)			
T1 (3) в виде Туре	Beg. Sta.	Side	Recorded By	Action Type	Report Date	Resolved Installed
1 REVETMENT, CLASS E	12322	L	Maggie Jones	Install	01/06/2018	01/15/2018
# BMP Type	Beg. Sta.	Side	Recorded By	Action Type	Report Date	Resolved
2 WETLAND GRASS SEEDING	234	R	Maggie Jones	Install	01/06/2018	01/15/2018
# BMP Type	Beg. Sta.	Side	Recorded By	Action Type	Report Date	Resolved

#### Figure 25 – Unresolved Actions and Actions Items Resolved as shown while completing an inspection

- 1. *Weekly Inspections* (example shown in Figure 25) display Unresolved Actions and Action Items Resolved Since Last Inspection
- 2. *QA Inspections* (example not shown) display Unacknowledged Observations and Observations Acknowledged Since Last Inspection

- 3. Information displayed in these windows <u>cannot be edited</u> from the **Edit Inspection** screen but may be edited using the Edit Findings functions on other screens
- 4. Total count for each section is displayed next to the section window
- 5. Findings are organized in each window by project and total count for each project is displayed
- 6. Press and hold a finger to scroll up and down the findings window
- 7. *Weekly Inspections* will display "New" for Report Date and \* as Due Date for **new Action Items** (see fields highlighted in Figure 25) because the Inspection Report has not been filed and sent to the contractor. Actual due date is displayed in Permix after the report is filed and contractor receives notification by Permix.

### **Completing Summary Questions Section**

As you continue scrolling down, you will see items shown in Figure 26.

10:25 AM Tue Jul 23	uli 🛜 🕇 89% 🔳)
Summary Questions	
Other Comments or Observations - e.g. any general comments about erosion or sediment control work performed, any areas where land disturbing activities have been temporarily or permanently suspended, any areas unable to access during inspection, any areas where inspections have been suspended and reason, etc.:	
Can corrective action be performed within 72 hours after inspection? If no, then document why it is impracticable. (Note: Permit requires corrective actions be completed within 7 calendar days following inspection.)	
Emergency Erosion Control Mobilization Notificatio	n
Is Emergency Erosion Control Mobilization needed fo	r any of the unresolved action items? <b>No</b>
Photos Camera	

Figure 26 – Completing inspection information - continued

- 1. **Summary Questions**: *Tap then Type* (required) Answer summary questions. These are required.
- 2. Emergency Erosion Control Mobilization Notification: Default is set on "No". To change to yes, *tap* the toggle to switch from No to Yes. Contractor will receive notification of an emergency erosion control mobilization.

- 3. **Camera**: *Tap* the toggle (optional) to switch between Camera and selecting pictures from Camera roll
- 4. **Pictures**: *Tap* the window (optional) to add up to 20 images. *Tap* then *Type* captions below each image.

#### **Completing Certifications and Signatures Section**

At the end of the report, you will see the Certifications and Signature section (Figure 27).

uti Verizon 👽 🔉		11:33 PM	C \$ 81% 🔳 )
Certifications and S	Bignatures		
I certify, under per accordance with a submitted. Based of for gathering the ir complete. I am awa and imprisonment	alty of law, that this docume system designed to assure t on my inquiry of the person o formation, the information s are that there are significant for knowing violations.	nt and all attachments were prepar hat qualified personnel properly ga r persons who manage the system ubmitted is, to the best of my know penalties for submitting false inform	red under my direction or supervision in athered and evaluated the information n or those persons directly responsible vledge and belief, true, accurate and mation including the possibility of fine
Inspector field sign	ature Maggie Jones	read only values	Date: 01/15/2018 11:20 PM
For contractor fiel name from the Co signature may be sign in the field. If signature.	d signature, contractor may ntractor rep providing signat completed in the web AFTER not signed in the field, notifie	provide signature on swipe pad be ure field. These values are not save this report is submitted if contrac cation will be sent to contractor ins	low AND select the corresponding ed with draft reports. Contractor tor is not present or does not wish to spector to login to IDOT Permix for
Contractor rep sign	ature Clear	h.n./3	er la
Contractor rep providing signature	Admin User		Date: 01/15/2018 11:20 PM
	Save Cancel	Delete Draft	File Now

Figure 27 – Completing inspection – Signatures

- 1. Inspector field signature: Read only text recognizing the Permix user that is filing the Inspection Report
  - The user name and password to login to Permix represents the user's electronic signature
  - In some cases, this Permix User may be different than the "Inspection made by" field in the Inspection Information section

- 2. **Contractor rep signature**: *Finger Swipe* signature of contractor representative that is certified and authorized to sign the Inspection Report for the Prime Contractor
  - Signature image will be saved with the Inspection Report
  - Tap Clear to erase the signature and retry or leave blank to sign later in the web
- 3. **Contractor rep providing signature**: *Tap* then Scroll to select the name of the Permix User associated with the Prime Contractor company that the signature was provided for
  - If contractor does not sign the report on the iPad, Permix will send notification to review and sign the report to the contractor's assigned inspector.

### Saving or Filing Inspection Report

At the bottom of Figure 27, you will see the following options:

- 1. Tap Save (bottom) to save page details and remain on the Edit Inspection screen
- 2. Tap **Cancel** (bottom) to abort changes made on the **Edit Inspection** screen and return to the **Inspection List** screen. Inspection Report will be in Pending status
- 3. Tap **Delete Draft** (bottom) to remove the draft Inspection Report from the app, including all data previously saved to the report
- 4. Tap File Now (bottom) to save all page details and submit the Inspection Report

Saving the report will create a draft inspection report that is only available on your iPad. This means you will only be able to view or edit the report on your iPad, and it will not exist to you or others if logged into the web version of Permix. Selecting **File Now** means the report is completed. The contractor will then receive notification of this report. The report will also be viewable to anyone having access to the project on their iPad or through the web version of Permix.

It is very important to be aware that <u>draft</u> reports only exist on your own iPad. This means if you ever delete or update your app, the draft reports will be deleted if they are not filed.

# **Project Information**

Project information is available as read-only information on the iPad app. Editing the information is only available from the web version of Permix.

Project details provided are shown in Figure 28. Press and hold a finger to scroll up and down the Assignments window.

2:48 PM Tue Jul 23				ull 🗢 🕇 66% 🔳		
Projects	Project Details					
Project Number: 01162018 Project Te Work Type: System Testing Location: This is a test project	st used for system validation to	Contract ID: County: esting a Status:	16-Jan-2018 00-Test Construction			
Active Construction Complet Project Dates Contract Lettin Contract Awar Actual Star	e: g: d: 01/01/2018 rt: 01/02/2018		Final Stabilization:			
Permit Information NPDES Authorization Number Start Dat Expiration Dat Permit Closed Dat Assignments	er: 9999-99999 e: 01/01/2018 e: 02/19/2018 e:	Project Num	Final Stabilization: Iber Satisfying Final Stabilization:	Required 01162018 Project Test		
Key Project Assignments	Jesse Poore	т	est RCE Office			
RCE Designee:	Terry Lage	Т	est RCE Office			
IDOT Project Lead Inspector: Consultant RCE:						
BMPs	Actions	Observations	Inspections	(j) Info		

Figure 28 – Project Details screen