PermiTrackESC Quick Guide

Logging into PermiTrackESC on a Computer

1. Open your web-browser, and enter the web address https://portal.sehinc.com/.
2. Click the Client Login link, and on the login page, enter your user name and password.
3. Click the **PermiTrackESC** tab, if you have multiple SEH applications.

Creating a Project Type

1. Click on the Projects tab.
2. Click on the Project Types link on the Project List page.
3. On the New Project Type page, enter the project information.
4. Click the Save button.

Creating a New Partner

1. Click on the Partners tab.
2. On the Partner List page, click on the New Partner link.
3. Enter the Partner and Primary Contact information.
4. Click the Create button.

Creating a New Project

1. Click on the Projects tab.
2. On the Project List, click the New Project link above the list.
3. On the New Project page, identify and define the project.
4. Click the Save button.

Editing Project Information

1. Click on the Projects tab.
2. On the Project List, click the Edit icon next to the project name.
3. Review the information on the Edit Project page.
4. If needed, modify the project information.
5. Click the Save button.

Creating a New Inspection

1. Click on the Projects tab.
2. On the Project List, click the New Inspection icon next to a project name.
3. On the Create a New Inspection page, enter the Inspection and Inspection Items information.
4. Click the Add BMP link to assign a BMP to the template.
5. Fill in the BMP information.
6. Click the Save As field in the upper right corner to save the record as either Draft or Final.
7. Click the Save button.

Editing Inspection Information

1. Click on the Projects tab.
2. On the Project List, click the Inspection History icon.
3. On the Inspection List, click the Edit icon next to the inspection.
4. If needed, modify the inspection information.
5. Click the Save button.

Creating a New Group

1. Click on the Projects tab.
2. Click on the New Group link on the Groups List
3. Enter the Group Name and Description.
4. Click the Save button.

Creating a New Event

1. Click on the Projects tab.
2. Click the Events link on the Project List
3. Click the New Events link on the Event List page.
4. Enter information in the fields.
5. Click the Next button to save the information and go to the Project Search page.
6. Enter criteria for identifying the projects that should receive notice of the event.
7. Click the Search button to search for projects that match your criteria.
8. Click the Create Event button to create the event and notify the selected projects

Creating a New BMP

1. Click on the BMP tab.
2. On the BMP List page, click on the New BMP link.
3. Enter the Category, Name, and Description information.
4. Click the Create button.

Creating a New Template

1. Click on the Template tab.
2. On the Template List page, click on the New Template link.
3. Enter the Name and Inspection information.
4. Click the Add BMP link to assign a BMP to the template.
5. Fill in the BMP information.
6. Click the Save button.

PermiTrackESC Quick Guide

Running Project or Invoice Summary Reports

1. Click on the Reports tab.
2. On the Reports Options page, click on the New Template link.
3. Select either the Project Summary or Invoice Summary report.
4. Select the Output format.
5. Click the Run Report button.

Running Application Reports

In addition to the reports available through the Reports tab, these reports are available through other parts of the application:

- **Single Project Report**: Click the Report icon on the Project List page to view or save a report that lists key information for an individual project.
- **Inspection Report**: Click the Report icon on the Inspection List page to view or save a report for an inspection.
- **Event Compliance Report**: Click the Report icon next to an event on the Event List page.

Importing a Coordinate Lookup Table

The Coordinate Lookup Table Import page is used to upload the file containing parcel numbers and their corresponding coordinates.

1. Click on the Projects tab.
2. In the Project List, click on the Coordinates link.
3. Select the Import information.
4. Click the Import button to import the file.

Setting Preferences

1. Click on the Projects tab.
2. On the Project List page, click on the Preferences link.
3. Select the fields you want to see in the Project List page.
4. Click the Save button.

Requiring an Inspection after a Weather Event

1. Click on the Projects tab.
2. On the Project List page, click on the Events link.
3. Click the New Event Link.
4. Enter information to record and describe the event.
5. Click the Next button.
6. Enter information to identify the projects that must be notified of the event.
7. Click the Search button.
8. Select the check box next to each of the projects that you want to notify.
9. Click the Create Event button.

Recording an inspection with a PDA or handheld device

1. Open your web-browser, and enter the web address for your **PermiTrackESC** site (http://portal.sehinc.com).
2. Tap the Go icon.
3. On the Welcome page, tap the **PermiTrackESC** link near the top of the page.
4. Tap the Login link near the top of the page.
5. On the Login screen, type your user name and password.
6. Tap the Login button.
7. If the system displays a message warning you about sending information over the Internet, tap the Yes button.
8. On the next page, click the **PermiTrackESC** link.
9. On the list of projects, tap the **Inspection** icon next to the name of the project you are inspecting.
10. On the inspection page, record information about the inspection.
11. If you want to attach a photo:
    a) Take the photo with your PDA.
    b) Scroll to the middle of the inspection page.
    c) Tap the Add Photo link.
    d) Tap the Browse button to locate the photo on your PDA.
    e) Tap the name of the photo you want to upload.
12. Select Draft from the Save As drop-down list if you have not completed the form. When the inspection is complete, you can select Final in this drop-down list before saving.
13. Click the Save As button to save the inspection.
14. Click the OK button on the success message.

For assistance with technical questions and/or issues we offer product support Monday through Friday, 7:00 a.m. to 5:00 p.m. (CST), excluding major holidays.
Support is available via e-mail or phone at 612.333.2123.