Managing and Printing Permits

This is a guide to managing permits once they've been submitted, including how to print new permit documents using the data stored in TrustedPartner.

GETTING STARTED

Before following the step-by-step process below, be sure to save the three permit MASTER documents (word) and three permit MASTER data sheets (excel) to a central place on your shared drive. It may be worth saving them somewhere for back up, and again someplace where you'll be using them regularly. Just in case ;^)
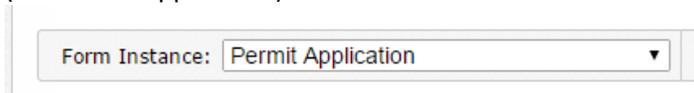
Submitting a Permit Application

1. Customer submits permit application online.
2. Confirmation email is sent to the applicant
3. Notification email is sent to PB Film alerting them to the new application
4. The permit application data is stored in TrustedPartner in the Custom Forms Module upon submission. See *Managing Permit Applications in TrustedPartner* section below for details on how to manage this data.

Sending Insurance Certificate Information

1. When PB Film employee receives the notification that a new application has been submitted, there will be a link to the Insurance Certificate form in that email.
2. Clicking on the link, the PB Film user then enters the client's email address (can copy/paste from email), and checks off all necessary municipalities.
3. Clicking "Submit" on this form sends an email to the applicant with all necessary insurance certificate information.

Managing Permit Applications in TrustedPartner

1. Log into TrustedPartner and go to Custom Forms > Responses.
2. In the drop down at the top of the page, select the form for which you'd like to see submissions (ex. Permit Application)

Form Instance: Permit Application

3. The most recently submitted application will appear at the top of the list.
   a. By default, new applications will not have anything entered in the "Internal Status" field.
4. Find the application for which you are looking by either looking through the list, or using the filter fields in the top left corner of the screen.
   a. NOTE: you can customize the fields that are shown in the filter by clicking on the "Configure" button next to the drop down at the top of the page.

Submitted Begin Date

Submitted End Date

Permit Number

Project/Title

Include Processed
Show All

Include Archived
Hide Archived

Results/Page
50

Search

5. Once you've found the application you'd like to work on, click on the "edit" action icon for that application. It's the first icon & looks like a pencil and paper.

6. Upon opening the application for the first time, set the Internal Status to "Draft" and enter "DRAFT" into the Permit Number field.
   a. This way, when you create the draft version of the permit document, that word appears until an actual permit number is assigned.
   b. Once you're ready to assign a permit number, you'll just replace the word "DRAFT" with the number.
7. In this view, you can make any changes necessary right in the form fields. Doing so ensures you have all of the data in one place, and in a format that will be easily populated into the permit document.
   a. Required fields are marked with an asterisk.
8. Once you've made your edits, click 'save'.
9. You can open and edit an application record as many times as you'd like.

Creating the Permit Document

The process for creating the permit document is the same whether you're creating a draft or the final document.

Pull the data

1. Log in to TrustedPartner, and go to Custom Forms > Responses.
2. Select the appropriate permit from the drop down
3. Filter the list down to the one permit you want to print by putting the project name, or some other identifying data in the search filter.
4. Once the list page has only the permit you'd like to print, click the export button at the top of the page, next to the dropdown


5. In the export pop-up, choose the correct permit export from the dropdown at the top of the window, and click "export"
6. Open the excel file that was created.

7. Save the file as the MASTER excel file, overwriting the one you had.
   a. If you don't want to overwrite the existing file, you can save it on its own, but since it's a one-off data pull, you may not see the need to save the spreadsheet.
8. Close the file.

Create the Word Document

1. Open the permit MASTER file (word document) for the permit type you'd like to create: Permit, Student Permit, Special Effects/Stunt Permit
   a. If you get a popup that looks like this, click 'yes'.
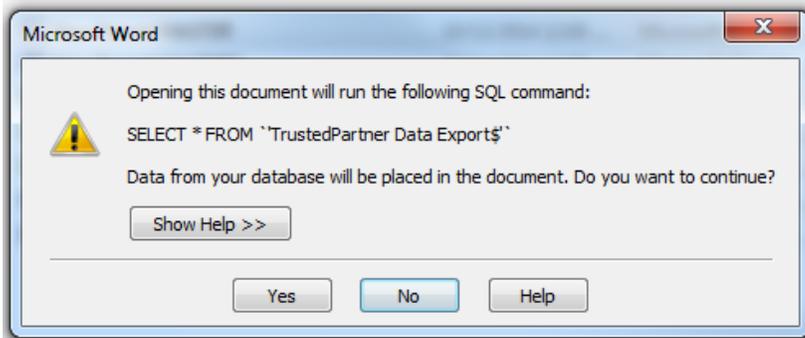
2. In the "Mailings" menu in word, find the option to "Select Recipients"
   a. Choose "Use Existing List"
   b. Navigate through the file browser until you find the MASTER spreadsheet you overwrote or the new file you just saved, and select the file.
   c. If you get a pop-up like this, click ok.
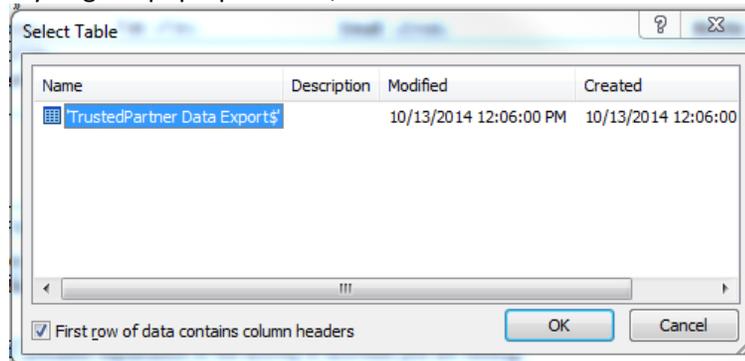
3. Find the "Finish & Merge" menu
   a. Select "Edit Individual Documents …"
   b. Choosing "Current Record" from the ensuing pop-up will create a document for the first record.
   c. You can also choose the "From: / To:" option and put "1" in both boxes (from 1 to 1) to ensure you get just the one permit.
   d. Selecting "all" could return just the one permit, or it could return several blank permits if the document happens to read some of the excel rows as records, even if they're blank. This is not likely, but something I've encountered in Word, so I choose one of the other options to ensure I get just what I want.
4. The end result will be a completed Permit Application in a word document that you can then edit, print, etc. as needed. **Save it.**
   a. Note: in the case of the main Permit Application, there may be more than one page to the application.
5. If you need to make edits to the information on the permit document, be sure to make them in TrustedPartner, so when you create the reports, or create the final Permit Document (if changes are made to the draft), you'll have the updated information imported right in.