



ZURICH[®]
Resilience Solutions

SmartPermit

Portal User Guide



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SmartPermit Overview



Smart Permit Overview: Roles



In the Smart Permit tool, there are four roles. Three roles exist for registered company users, and the fourth role is that of the person completing the permit. Each company can have as many of each role as required:



Customer Administrator

Customer administrators can configure new or existing sites and create and edit users. In addition, they can 'follow' sites and act like a site manager for sites they follow. A customer administrator has full access.



Site Manager

This may be the site manager, permit issuer, or the individual who normally has oversight and responsibility of the site and any works undertaken. This might also be a key contact from the contractor, for example in situations where the work is sub-contracted.



View Only

This is an individual who requires oversight of the sites, permits, and users for a company but does not need to action or edit anything.



Contractor

This is the individual(s) carrying out the work. The contractor will be asked to enter their details at the induction stage and does not need to register for SmartPermit in advance.



Smart Permit Overview: Permit process



The Permit journey is separated into four key stages: Induction, Work, Watch Period & Closure. The below diagram outlines the end-to-end process of the Smart Permit and demonstrates the interactions between the Contractor and Site Manager.

1. Induction



The site manager shares the site specific QR code or URL with the contractor who completes a new permit request to start work.

The site manager reviews the permit request and either approves or denies it.

2. Work



The contractor is notified of the decision via SMS and if approved can begin work.

If the work is taking longer than expected the contractor must submit a permit extension.

The contractor can delegate the permit to another contractor if needed.

3. Watch period



Some permit types require the contractor to undertake a watch period via the Smart Permit once they have completed their work.

Progress photos must be submitted every 30 minutes.

The contractor can delegate the permit to another contractor if needed.

4. Closure



Once the watch period is complete the contractor must answer the post watch period questions and close the permit.

For permits that don't have a watch period, the permit is closed after the post work questions.

“How to” guide

This guide is for Site Managers, Customer Administrators, and View Only users using the Smart Permit portal. All three user roles log in to the same portal, but each have different functionality available to them once logged in. Each of the sections throughout the guide will state the user roles for which it applies.



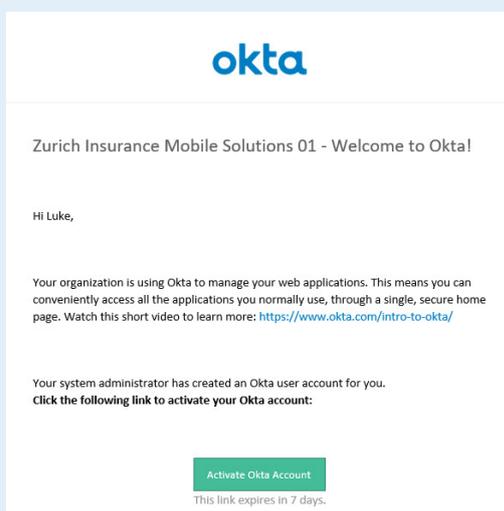


Portal access:

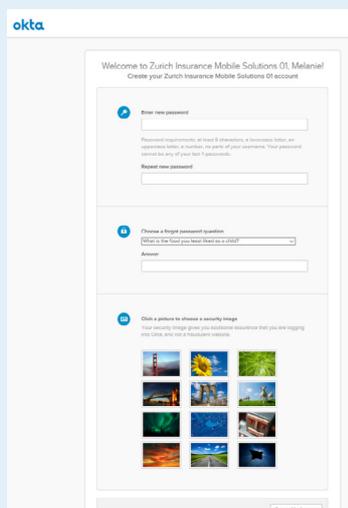
How do I set up access for first time log-in to the Smart Permit portal?

Site Manager/Customer Administrator/View Only

Note: Users will receive an email from 'Zurich Smart Permit' that will include a link to the login page for the dashboard.



1. Once you have been set-up in the tool as a new user (see **How do I create new users?**), you will get two emails: one from Smart Permit with a link to the tool and one from Okta (noreply@okta.com) asking you to **'Activate Okta Account'**. **Note: This Okta link is only valid for 7 days and you must activate your Okta account before logging into the Smart Permit tool.**



2. This will open a page titled **'Okta'** where you will need to create a password, a question for forgot password, and a security image. **Note: Password must be at least 8 characters, contain a lowercase, uppercase, a number, and no parts of your username.**
3. Then click **'Create My Account'**.
4. This will take you to the OKTA confirmation screen stating **'You don't have any apps'**. This screen can be closed as is only applicable for registration.
5. You can now open the Smart Permit portal via the link provided in the email from Smart Permit and log-in.

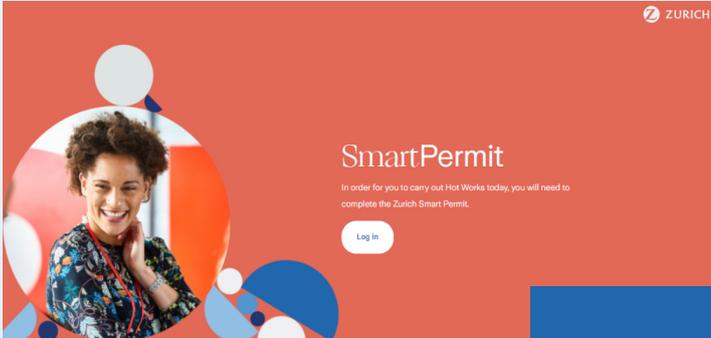




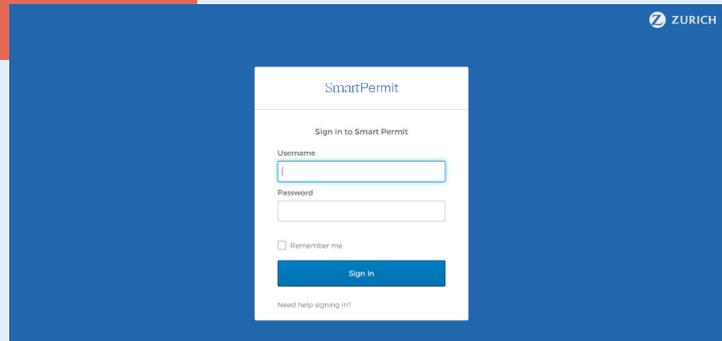
Portal access:

How do I log-in to the Smart Permit portal?

Site Manager/Customer Administrator/View Only



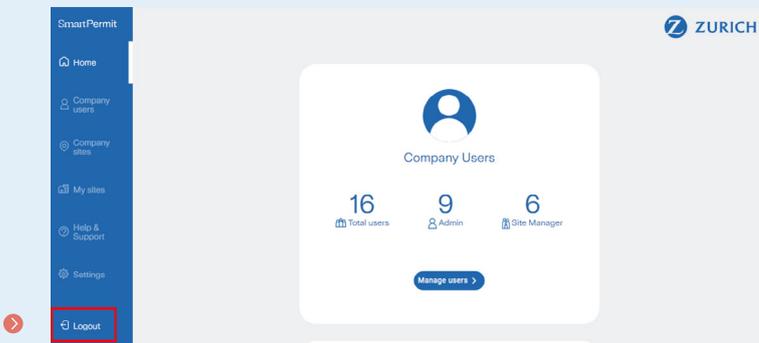
1. Navigate to the Smart Permit portal.
2. To log-in you will need to enter your email address and password.



Portal access:

How do I log-out of the Smart Permit portal?

Site Manager/Customer Administrator/View Only

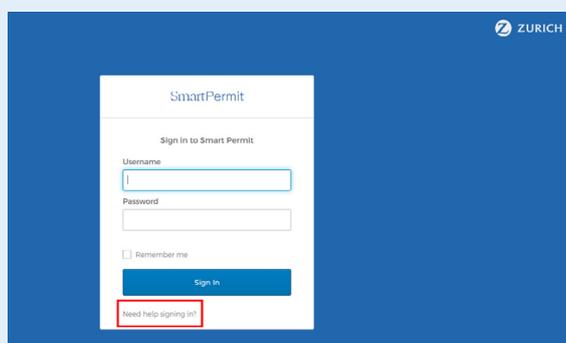


1. When logged in, click '**Logout**' at the bottom of the left-hand side menu.
2. You will be returned to the login screen.

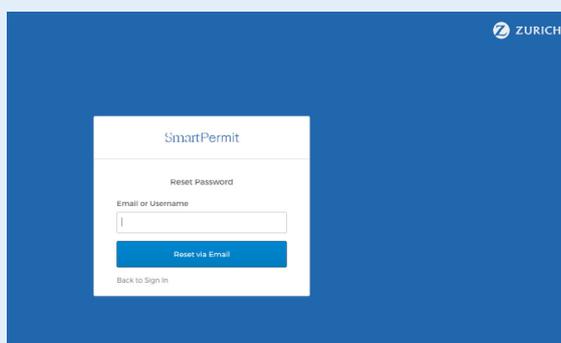


Portal access: How do I re-set my forgotten password?

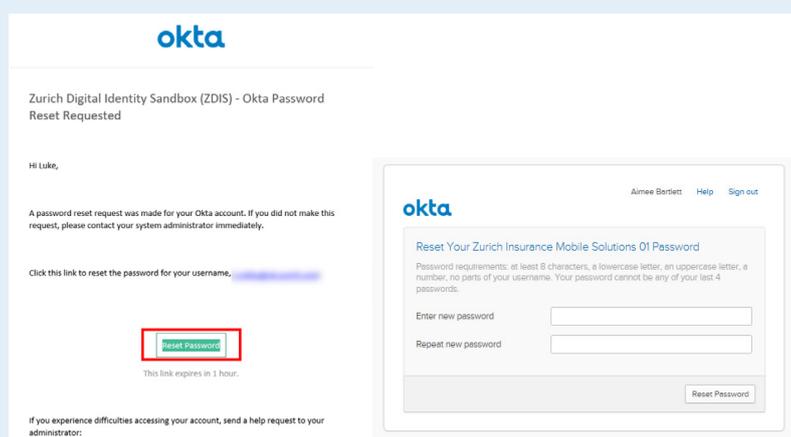
Site Manager/Customer Administrator/View Only



1. Access the Smart Permit portal log-in page and click the **'Need help signing in?'** text the click **'Forgotten password?'**



2. Enter your email address and click **'Reset via email'** button.
3. An email will be sent to the address provided with a link to **'Reset Password'**.

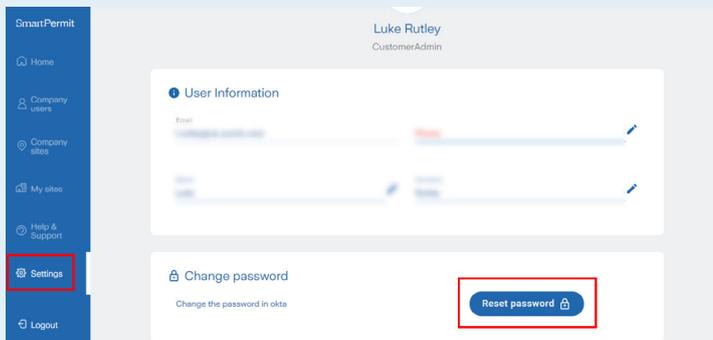


4. The link will open a page titled **'okta'** where you will need to provide a new password and click **'reset password'**. **Note: Password must be at least 8 characters, contain a lowercase, uppercase, a number, no parts of your username, and not be the same as your last 4 passwords.**
5. Then close the OKTA confirmation page.
6. Open site contact portal homepage to log-in – see section **"How do I log-in to the Site contact Portal?"**.

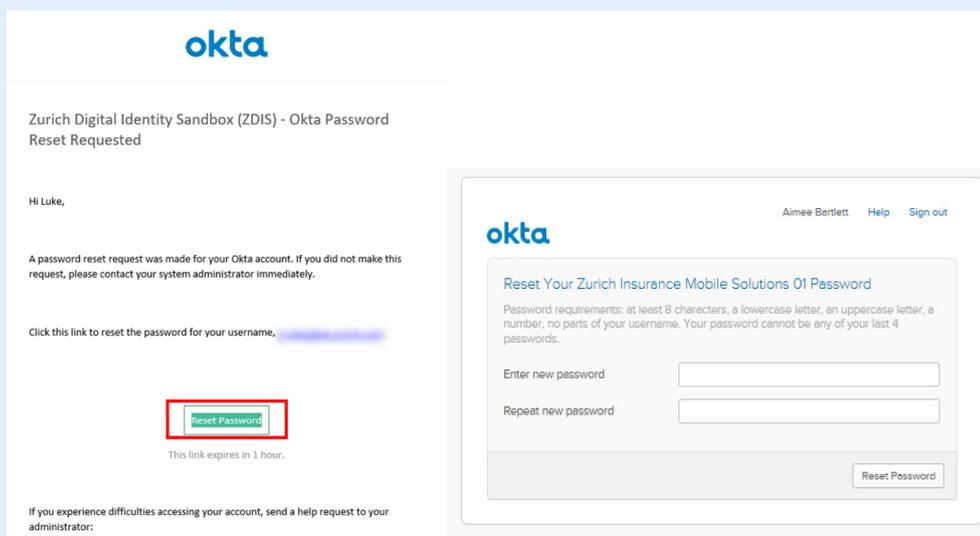


Portal access: How do I change my password?

Site Manager/Customer Administrator/View Only



1. Once logged in select **'Settings'** on the left-hand side menu.
2. Click **'Reset password'**.

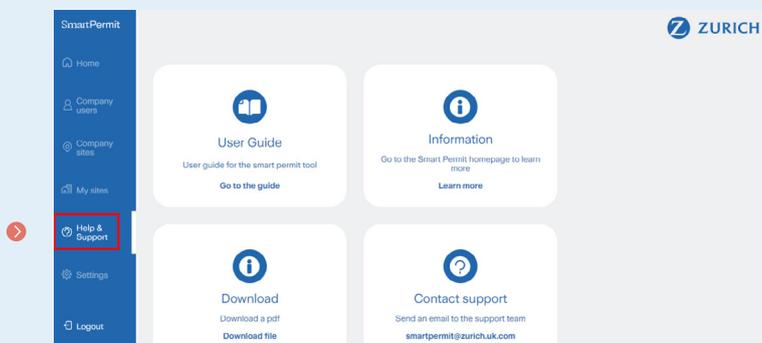


3. An email will be sent to the address provided with a link to **'Reset Password'**.
4. This will open a page titled 'okta' where you will need to provide a new password and click 'reset password'. **Note: Password must be at least 8 characters, contain a lowercase, uppercase, a number, no parts of your username, and not be the same as your last 4 passwords.**



Portal access: How do I access help and support?

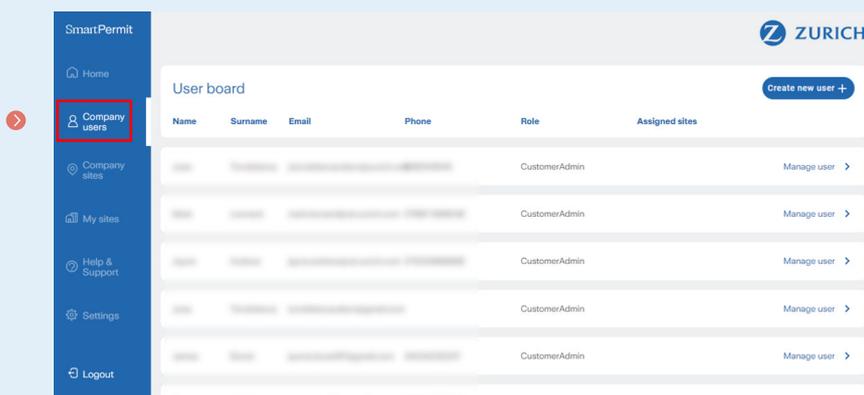
Site Manager/Customer Administrator/View Only



1. Once logged in, select 'Help & Support' on the left-hand side menu.
2. You can now access a range of documents, information, and contact details for the Smart Permit support team.

User management: How do I view users?

Customer Administrator/View Only

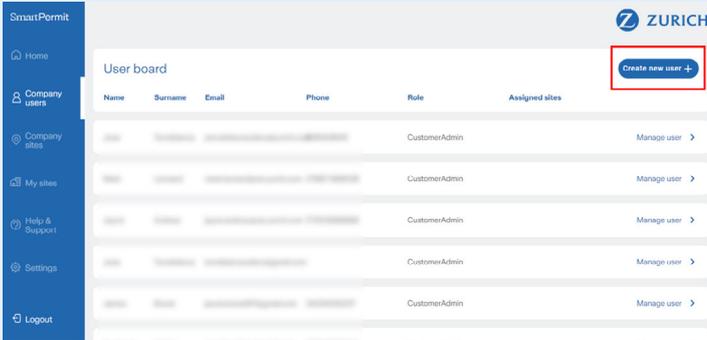


1. Once logged in select 'Company users' on the left-hand side menu.
2. Scroll to see all the company users. **Note: Only Customer Administrators will have the option to create new users or to manage users.**

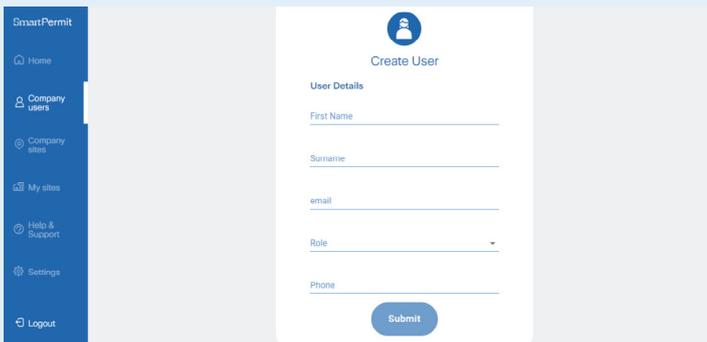


User management: How do I create new users?

Customer Administrator



1. Once logged in select 'Company users' on the left-hand side menu.
2. Select 'Create new user +'.



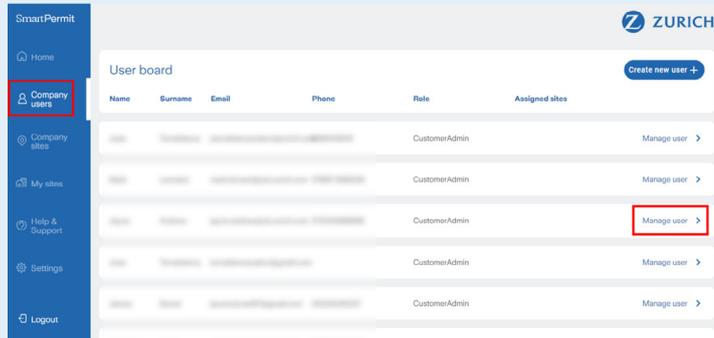
3. Enter new user details including selecting 'Role'. **Note: you will only be able to submit when all required details are entered. The details required depend on the user being created. Customer administrators and Site Managers will need a phone number, but a View Only user will not. If you are creating a site manager, you will also be able to assign one or more sites to them by clicking 'Assign Sites' and selecting the required sites.**
4. Click the 'Submit' button.



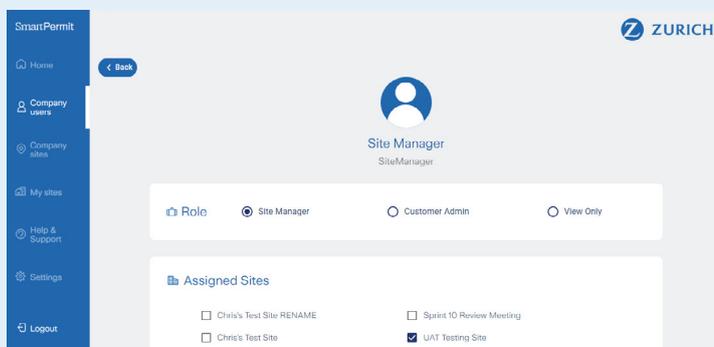


User management: How do I edit or delete users?

Customer Administrator



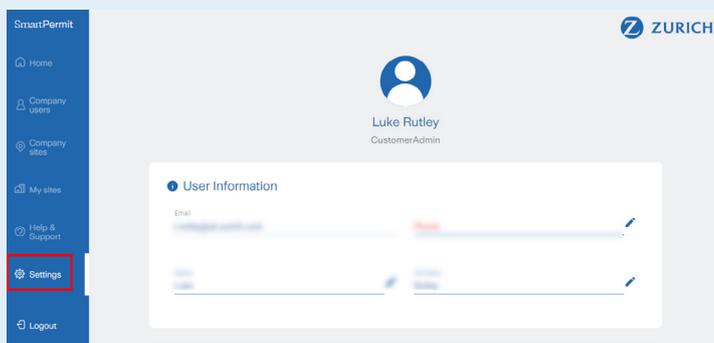
1. Once logged in select 'Company users' on the left-hand side menu.
2. Select 'Manage user' on the user you wish to edit or delete.



3. You can then edit any of the details of that user (role, assigned sites, user information) or delete the user by selecting 'Delete user' at the bottom of the screen. **Note: Changing a user's role will change their permissions, and hence the functionality they are able to access within the tool.**

User management: How do I update my own user information?

Site Manager/Customer Administrator/View Only

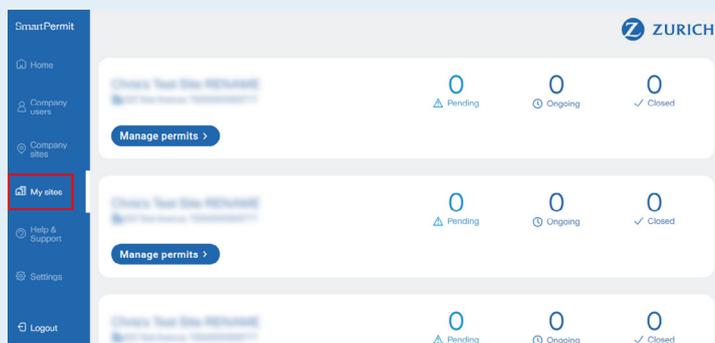


1. Once logged in select 'Settings' on the left-hand side menu.
2. Edit user information and click 'Save' at the bottom of the page to save changes.

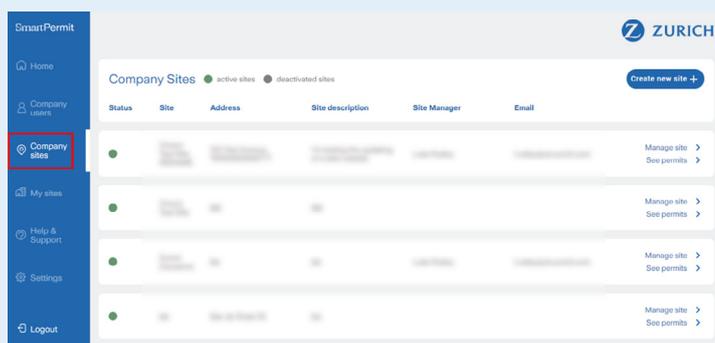


Site management: How do I view sites?

Site Manager/Customer Administrator/View Only



1. Once logged in select **'My sites'** on the left hand side menu to see the sites that you are assigned to (only applicable to Site Manager role) or following for notifications (only applicable to Customer Admin role).
Note: Since View Only users are unable to approve/deny permits, their "My sites" page will remain blank.

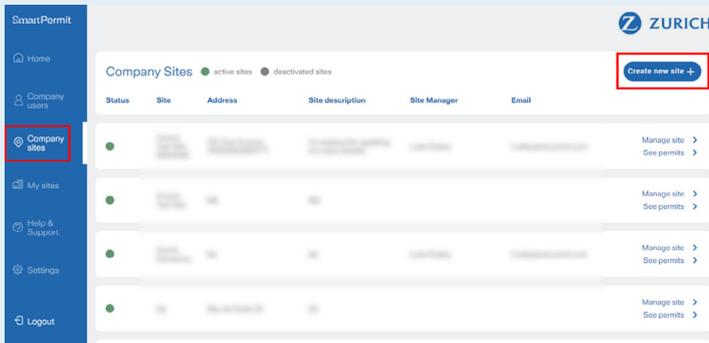


- OR
2. Once logged in select **'Company sites'** on the left-hand side menu to see all the sites in your company. **Note: Site Manager roles do not have access to 'Company sites' and are only able to see the sites that they have been assigned to by selecting 'My sites'.**

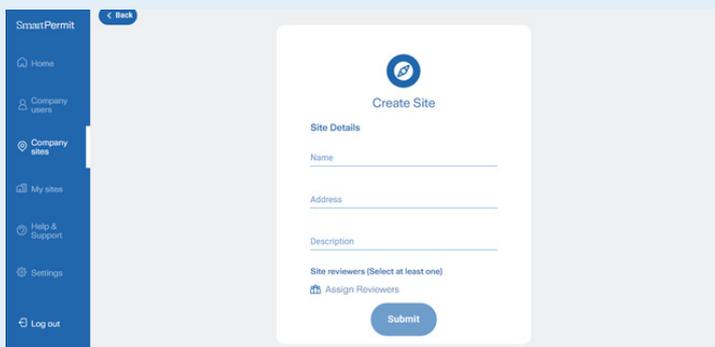


Site management: How do I create new sites?

Customer Administrator



1. Once logged in select 'Company sites' on the left-hand side menu.
2. Select 'Create new site +'.



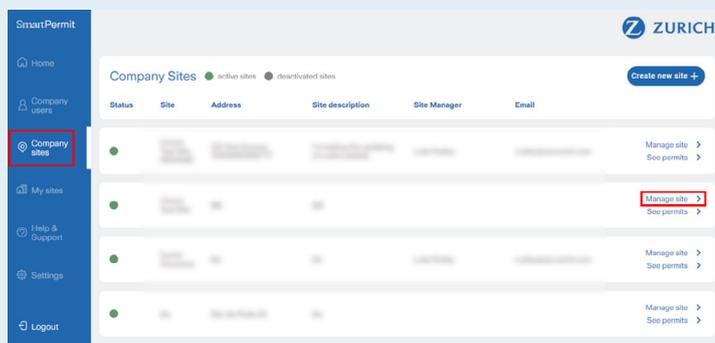
3. Enter new site details, including the site name, site address, a brief description of the site, and at least one site reviewer.
Note: you will only be able to submit when all required details are entered.



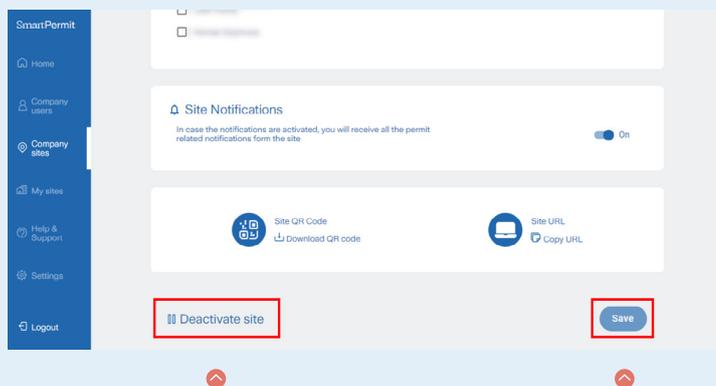


Site management: How do I edit/deactivate/reactivate sites?

Customer Administrator



1. Once logged in select 'Company sites' on the left-hand side menu.
2. Select 'Manage site' on the site you wish to edit, deactivate, or reactivate.
3. Amend the details you wish to change and click 'Save' at the bottom of the page to save your changes.

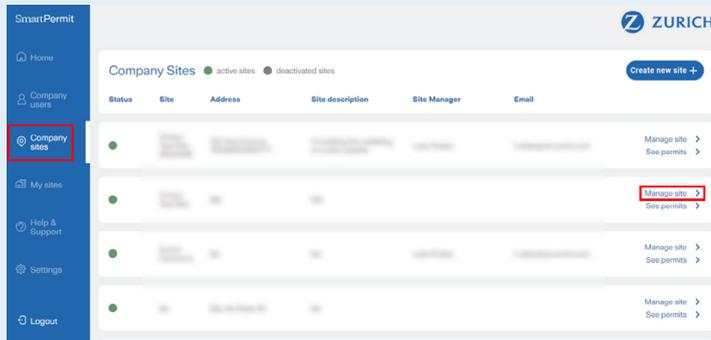


- OR
4. Click 'Deactivate site' or 'Activate site' at the bottom of the page to deactivate or reactivate the site respectively. **Note: when you deactivate a site, no new permits can be submitted for the site but all historic permits are retained. When a site is reactivated, new permits can be submitted again and all historic permits are still retained. The site managers previously assigned to this site when it was deactivated will be automatically reassigned to the site.**

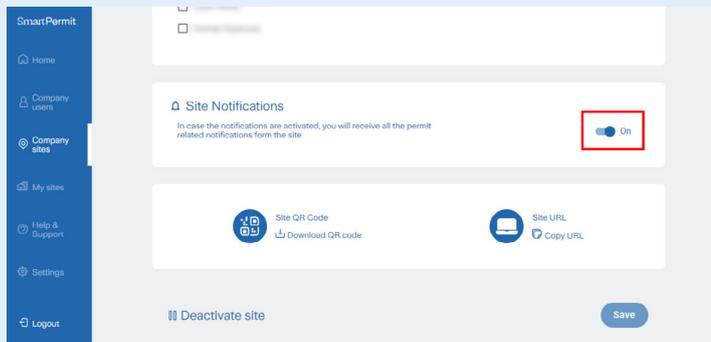


Site management: How do I subscribe to site notifications?

Customer Administrator



1. Once logged in select **'Company sites'** on the left-hand side menu.
2. Select **'Manage site'** on the site you wish to receive notifications for.



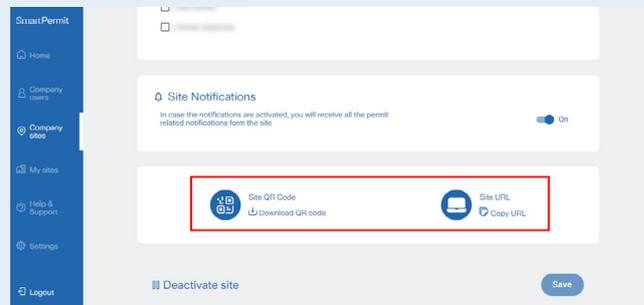
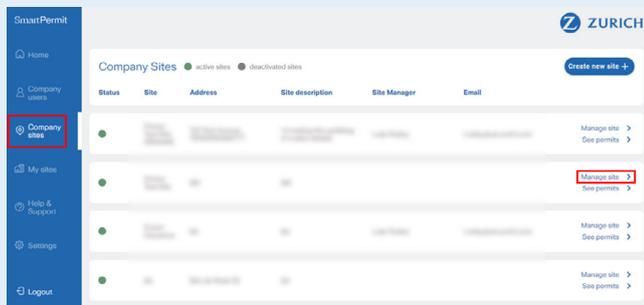
3. Toggle **Site Notifications** to **On**.
4. The site will now be listed under **My sites** and you will receive notifications for the site just as an assigned Site Manager would.





Site management: How do I share a site QR code or URL?

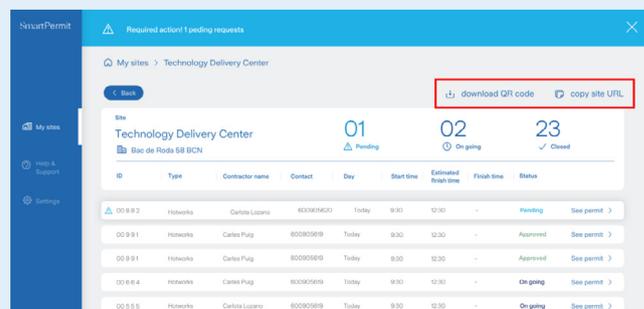
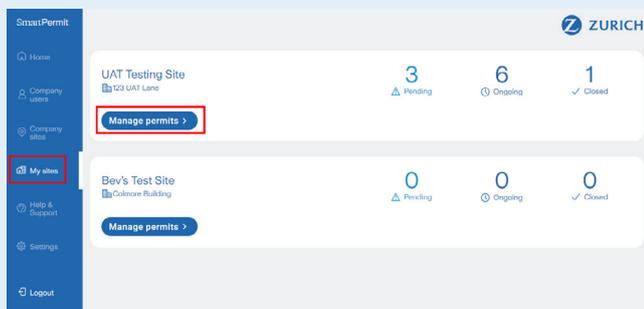
Customer Administrator/Site Manager



Customer Administrator

1. Once logged in select 'Company sites' on the left-hand side menu.
2. Select 'Manage site' on the site you wish to share the QR code or URL of.

3. Select either 'Download QR' code or 'Copy URL' to obtain the QR code or URL respectively.
4. You can then share the QR code or URL as required.
Note: we recommend printing the QR code out and making it available on site for the contractor to scan to start the permit process. The URL can also be shared with the contractor via email or SMS in advance but please note that the contractor must be on-site when completing the permit as they need to provide photos of the site in real-time.



Site Manager

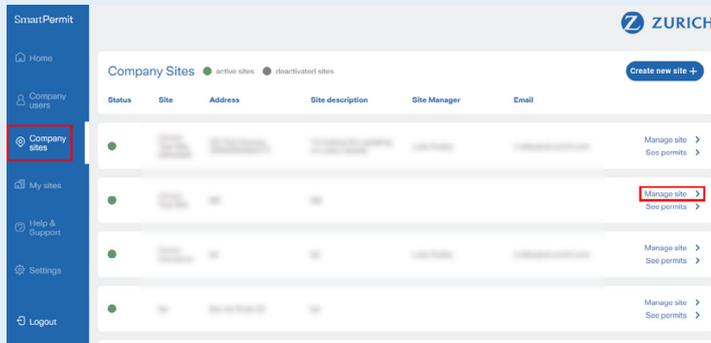
1. Once logged in select 'My sites' on the left-hand side menu.
2. Select 'Manage permits' on the site you wish to share the QR code or URL of.

3. Select either 'Download QR code' or 'Copy URL' to obtain the QR code or URL respectively.
4. You can then share the QR code or URL as required.
Note: we recommend printing the QR code out and making it available on site for the contractor to scan to start the permit process. The URL can also be shared with the contractor via email or SMS in advance but please note that the contractor must be on-site when completing the permit as they need to provide photos of the site in real-time.



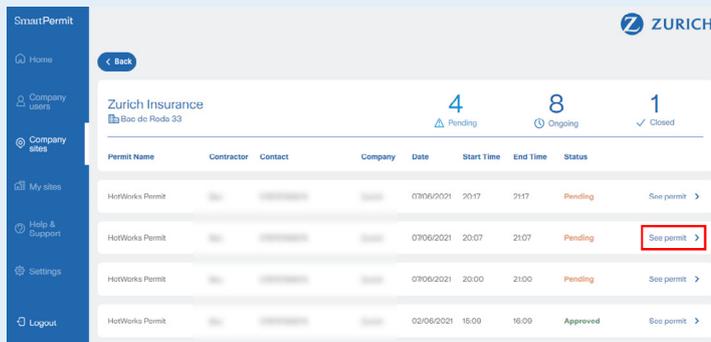
Permit management: How do I view and download permits?

Site Manager/Customer Administrator/View Only

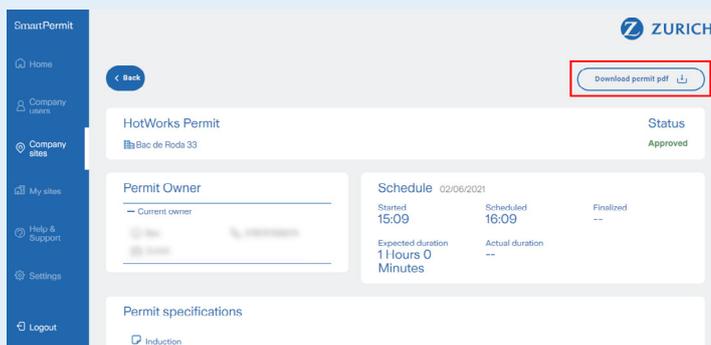


Customer Admin/View Only user

1. Once logged in select **'Company sites'** on the left-hand side menu.



2. Select **'See permits'** on the site you wish to view the permits of.
3. Select **'See permit'** on the permit you wish to view or download.

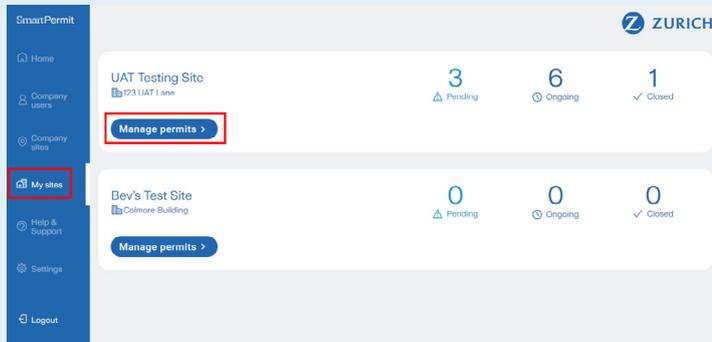


4. You can then view all the permit details within the dashboard or download the permit as a PDF.



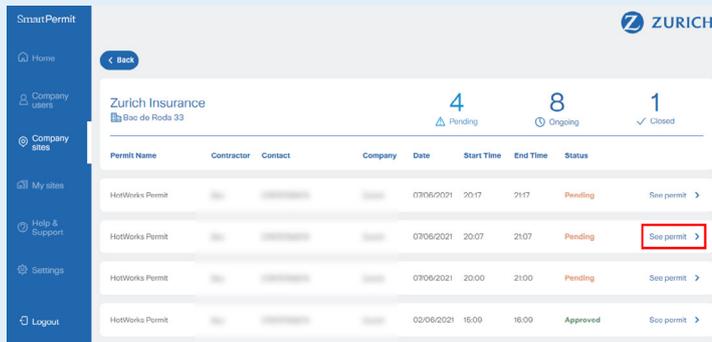
Permit management: How do I view and download permits?

Site Manager/Customer Administrator/View Only

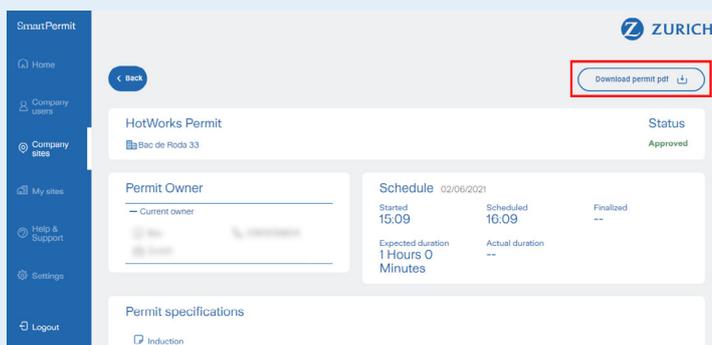


Site Manager

1. Once logged in select **'My sites'** on the left-hand side menu.
2. Select **'Manage permits'** on the site you wish to view the permits of.



3. Select **'See permit'** on the permit you wish to view or download.

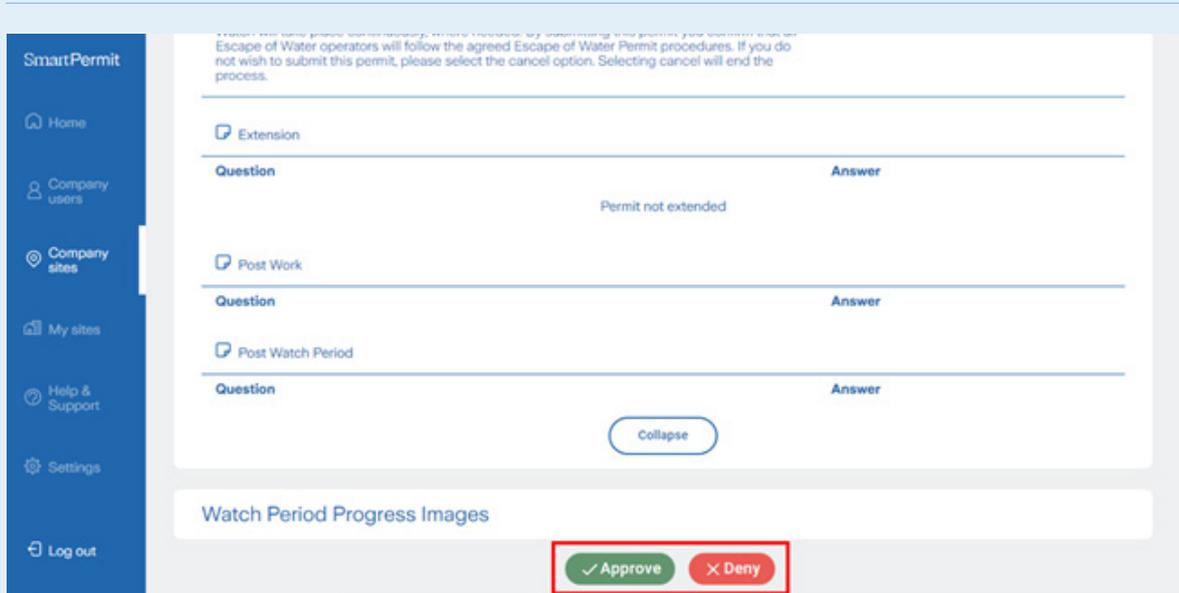


4. You can then view all the permit details within the dashboard or download the permit as a PDF.



Permit management: How do I approve or deny a permit request?

Site Manager/Customer Administrator



1. All Site Managers and Customer Admins who are assigned to or following the site will receive an email and SMS notification when a contractor has submitted a new permit request. **Note: A Customer Admin can approve or deny permits for any site, even if they are not following the site but will not receive notifications for sites they do not follow. For a Customer Admin to approve a site they do not follow, they must first navigate to the permit (see How do I view and download permits?) and then continue from step 3 below.**
2. Click the link in the email or SMS to view the permit and log-in when prompted to do so. The link will take you directly to the specific permit.
3. Review the permit details submitted by the contractor, including permit questions and image(s) of work area and then click button to 'Approve' or 'Deny' at end of page. **Note: If you need to deny a permit please ensure you contact the contractor to advise on the reason for permit being denied, and ensure no work is started until it is agreed with yourself as safe to do so.**
4. The contractor will be notified by SMS of the decision and their permit will change status accordingly.



Notifications: What notifications will I receive?

Site Manager/Customer Administrator

Note: Site Managers will receive notifications for all sites to which they are assigned, and Customer Administrators will receive notifications for all sites which they are following.

Context	Stage
Site Manager receives an SMS and email message when a permit has been submitted for approval by a contractor	Permit Submission
Site Manager receives an SMS message when a permit has been submitted for approval by a contractor AND they have not approved or denied within 10 minutes of permit submission	Permit Submission
Site Manager receives an email notification when the permit has been extended by the contractor	Permit Extension
Site Manager receives an email notification when a permit has been delegated from one contractor to another	Delegation of Responsibility
Site Manager receives an email notification when the contractor confirms that the work has been completed	Work Ongoing
Site Manager receives an SMS and email notification if, 10 minutes after the work was set to be completed, the contractor hasn't finished the work	Work Ongoing
Site Manager receives an email notification when the contractor starts the watch period	Watch Period
Site Manager receives an SMS and email notification 10 minutes after the watch period is set to be completed if the contractor hasn't completed the watch period	Watch Period
Site Manager receives an email notification when the contractor completes the watch period	Watch Period
Site Manager receives an email notification when the contractor completes the post watch period questions and closes the permit	Post Watch Period



For more information, you can visit our website at <https://www.zurich.co.uk/business/our-expertise/risk-engineering/smart-permit>.

If you have any questions or require any assistance, please get in touch via smartpermit@uk.zurich.com.

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