Q2 Permit System – Applying for a Permit

Accessing Q2:

- Go to https://q2.estate.warwick.ac.uk/q2
- Click on 'Compliance'
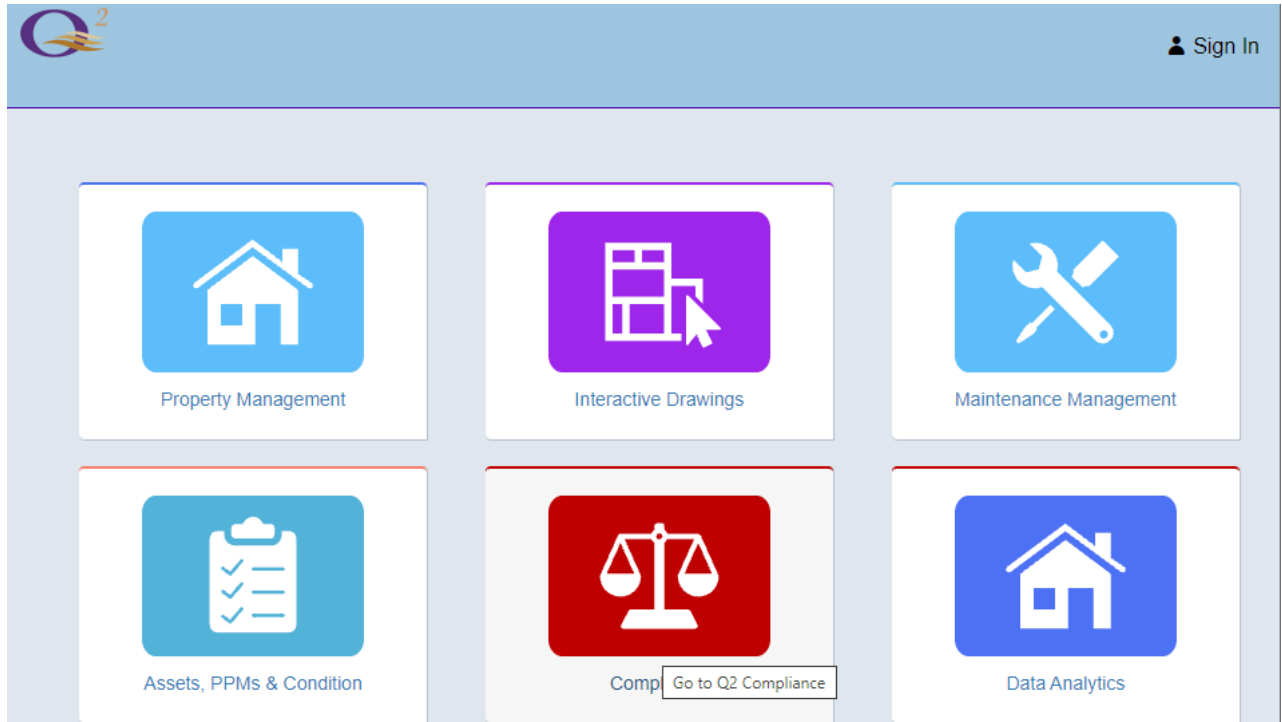
- Click on 'Permits to work'
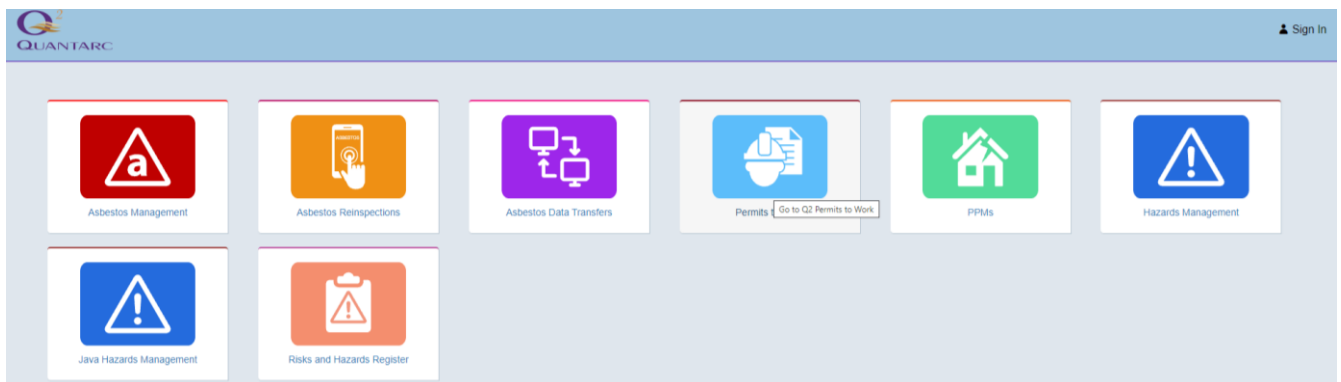
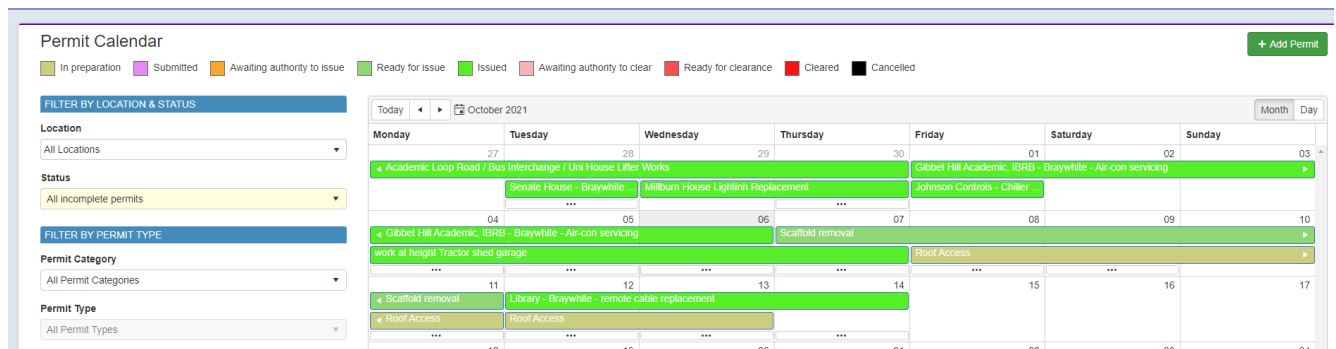- Log in using your username and password.

If you are accessing Q2 when working from home you will need to be connected to the VPN.

Requesting a permit:

The default page will be the permit calendar

- Click on 'Add permit' (green box, top right hand corner).

When applying for a permit you will navigate between 5 pages: 'job details, locations + risks, roles, permit details and documents'.

Step one – Add permit:

Permit title – 'where, who and what'

Valid from – start date

Valid to – end date

Add Permit

Permit Title *

Where, who, what

Permit Reference

(auto-generated)

Valid From *

06/10/2021 08:00

Valid To *

07/10/2021 16:00

Step two – Work details:

Permit description – 'work to be carried out and where'

Permit limitations – Optional, you can put 'None' or specify any limitations you may have.

Work details

Permit Description *

work to be carried out and where

Permit Limitations

None

Step three – Why is the permit required?:

Job type - The job type has a dropdown with two options:

    A.   Click 'Help desk', select the location, and confirm the job.
    B.   Click 'Other' and enter the job number.

Example of a

Why is the permit required?

Job Type *

Help desk

Location

(01.002.E00) – Building External

Job *

HD.2020070048.2 - Electrical checks carried out, pump faulty, replacement required.

Example of b

Why is the permit required?

Job Type *

Other

Job Number *

1234

Step four – Linked permit types:

Do you require any linked permit types? – **Always select 'Yes'** for Q2 to display the Hot Works, Roof Access and Working at Heights permit type.

You will select the permit you require or as many as you require.

General description of requirement – 'the work to be carried out'.

Linked permit types?

Do you require any linked permit types?

| Yes | ▼ |

Select all linked permits that apply: *

	Permit type	General description of requirement	Status
✓	Roof Access	work to be carried out	In preparation
☐	Hot Works		-
☐	Working at heights		-

Select 'save changes',

Your request's status is now 'In preparation'.

Permit Details

Permit Title *		Permit Reference	Date Initiated
Where, who, what TEST		MP.00078	06/10/2021

Valid From *	Valid To *	Permit Status
06/10/2021 08:00	07/10/2021 16:00	In preparation

Step five – Locations & Risks:

Click on 'Locations + Risks'

Job Details	Locations + Risks	Roles

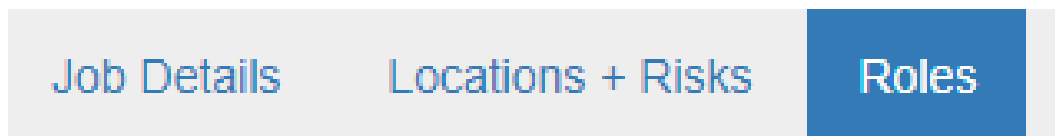Click 'Add location' or 'Add asset' and then select the location or asset
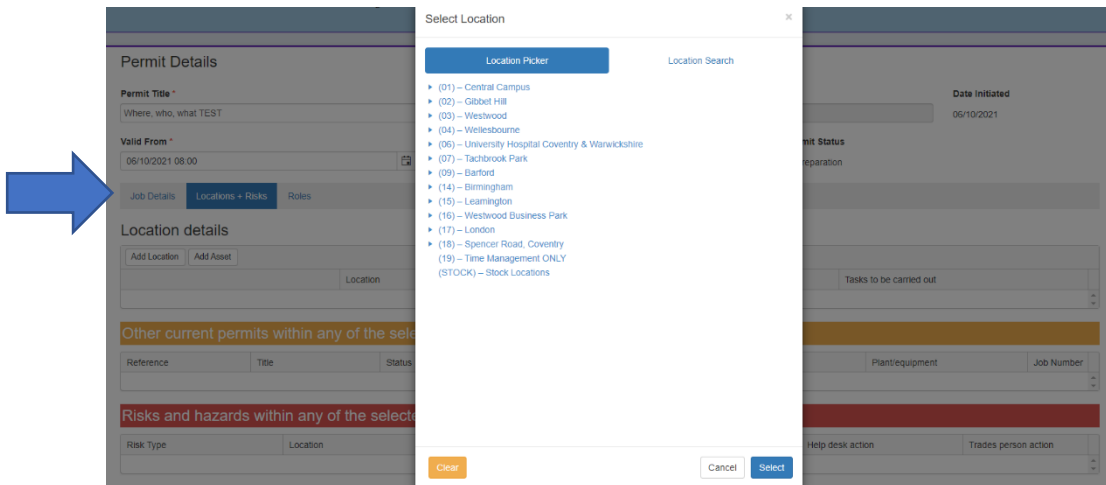
Tasks to be carried out – 'work to be carried out'

Click 'Save'

Select 'Save Changes.'

Step six – Roles:

Click on 'Roles'

The Originator (yourself) details will automatically be there

Receiving Authority

Internal/External - This dropdown has two options:

A. Click 'Internal', select the department (EX for Estates) and confirm the person who is 'Receiving Authority' (this will be the main lead competent person).

B. Click 'External' for contractors, select the supplier and confirm the person who is 'Receiving Authority' (this will be the main lead competent person).

Receiving Authority

Internal / External *

External ▾

Supplier * ↻

Art Cleaning (Midlands) Limited ▾

Receiving Authority * ↻

Select Supplier Contact ▾

For instructions how to add a new external contractor please see page 11 and 12.

Named Individuals On Site – click on the green 'Add' button and input each worker's name and telephone number.

Named Individuals On Site

Please enter both the name and mobile telephone number of all individuals who will carry out the work on site.

	Name
Delete	Lee Cartwright 123456789111

Select 'Save Changes'

Step seven:

Click on the 'Job Details' tab under 'Permit Details.'

Permit Details

Permit Title *	**Permit Reference**	**Date Initiated**
Where, who, what	MP.00086	08/10/2021

Valid From *	**Valid To** *	**Permit Status**
08/10/2021 08:00	09/10/2021 16:00	In preparation

Job Details	Locations + Risks	Roles

Scroll down to 'Linked permit types?' and click on the permit type you require (blue hyperlink).

Linked permit types?

Do you require any linked permit types?

Yes

Select all linked permits that apply: *

	Permit type	General description of requirement	Status
	Hot Works	work to be carried out	In preparation

Step eight – Permit details for your specific permit:

You will begin on the 'Permit Details' tab and complete the mandatory fields: Equipment, Means of access, Types of hazards, PPE required, Control measures, Salto access, 3 working days' notice provided and Has the building manager been notified?

Linked Permit Details - Roof Access

Permit Title	Permit Reference	Date Initiated
Where, who, what	MP.00086	08/10/2021

Valid From	Valid To	Linked Permit Status
08/10/2021 08:00	09/10/2021 16:00	In preparation

Permit Details | Documents | Written Instructions

Equipment: *

test

Means of access: *

test

Types of hazard: *

test

PPE required: *

test

Control measures: *

test

Do you require Salto access: *

Yes ▼

Have you provided 3 working days notice? *

No ▼

It is the requestor responsibility to notify the building manager. Has the BM been notified? *

Yes ▼

Additional comments

✓ Save Changes ▲ | Cancel

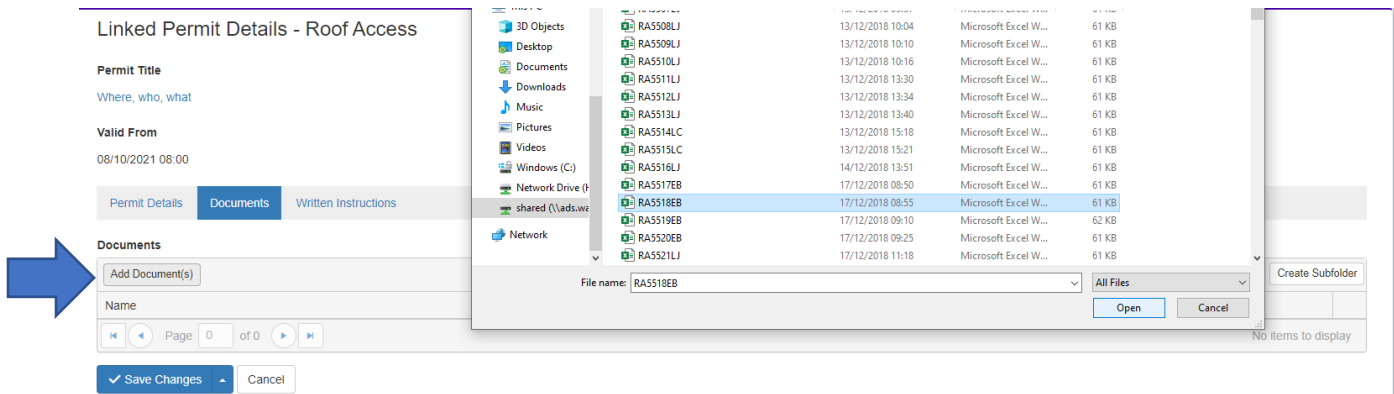Select 'Save Changes.'

Step nine:

Click on 'Documents'

Permit Details | **Documents** | Written Instructions

Click 'Add Document', find the document you want to upload and click open.
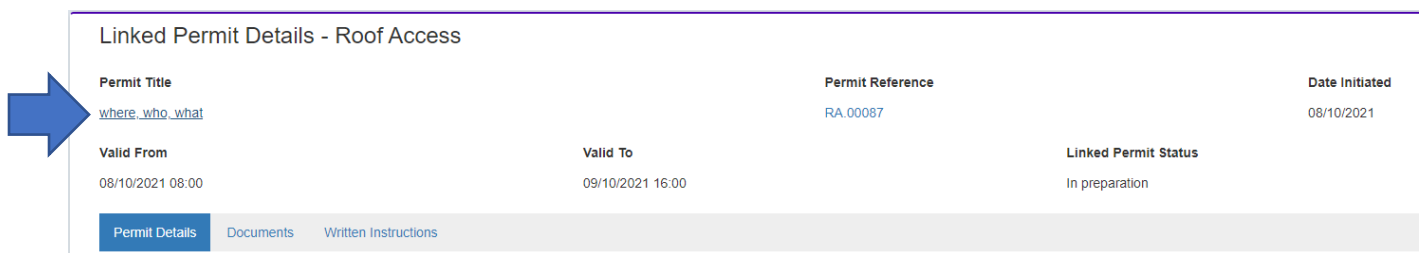

Select 'Save Changes'

Review the 'Written Instructions' tab for your own information.

If you have only requested the one permit type you will then click on your permit (blue hyperlink).

Scroll down to the bottom of the 'Permit Details' tab and tick the 'Preparation complete' box.

<u>Note: You will then not be able to make any further edits to this permit application</u>.

Select 'Save Changes'

If you have missed any mandatory fields the system will notify you.

Should you wish to cancel the permit entirely click on the red 'Cancel Permit' button on the far right hand side and specify the reason in the pop up box why you are cancelling.

You will then see at the top of the 'Permit Details' tab the 'Permit Status' has changed from 'In preparation' to 'Submitted.'

If you have selected more than one type of permit you will repeat steps seven to nine. Once each individual permit type has been completed you can then tick the 'Preparation complete' box.

The Permit Office will receive an automated email from Q2 notifying them of your permit to be reviewed.

Your permit will be emailed to the Requester as a PDF as usual the day before, however should you wish to view your permit please see below.

View the status of your permits:

To view the status of your permits go to 'Permit List' – 'Permit Reference'. Enter the permit reference number and it will automatically show as belowwith colour coding confirming the status of your permit. If for whatever reason it does not show, for example the permit has ended and been cleared, then change the status dropdown from 'All incomplete permits' to 'All statuses'.

If you would like to make any changes such as an extension, adding additional workers, or adding further documents then email permitresource@warwick.ac.uk with your permit reference and Admin will make these amendments for you.

Rejected Permits by the Permit Office:

If your permit is rejected by the Permit Office you will receive an email informing you why and with the hyperlink to access your permit on Q2.

Click on the hyperlink and rectify the issue by updating any information, uploading any missing documents etc.

Click on 'Preparation complete' and 'Save changes'

On Hold Permits:

A Requester can place their own permits on hold for various reasons such as bad weather or contractors rescheduling.

Find your permit, scroll to the bottom of 'Job details' and click the 'Place permit on hold' red button and specify a reason.

The status on your permit and in your permit calendar will show 'ON HOLD'.

The Permit Office will receive an automated email with a link to view your permit with the reason it has been placed on hold.

To take your permit off hold then find your permit and click on the 'Take Permit off Hold' red button and specify the reason such as 'Contractor has confirmed they are available to carry out works on X dates.'. Finally click 'Preparation complete'.

This will then restart the approval process for Admin and the Permit Officer to authorise.

Cloning Permits:

Requesters are able to clone their own permits they have previously submitted,

Find a permit you have previously requested, scroll down to the bottom and click the yellow 'Clone' button.

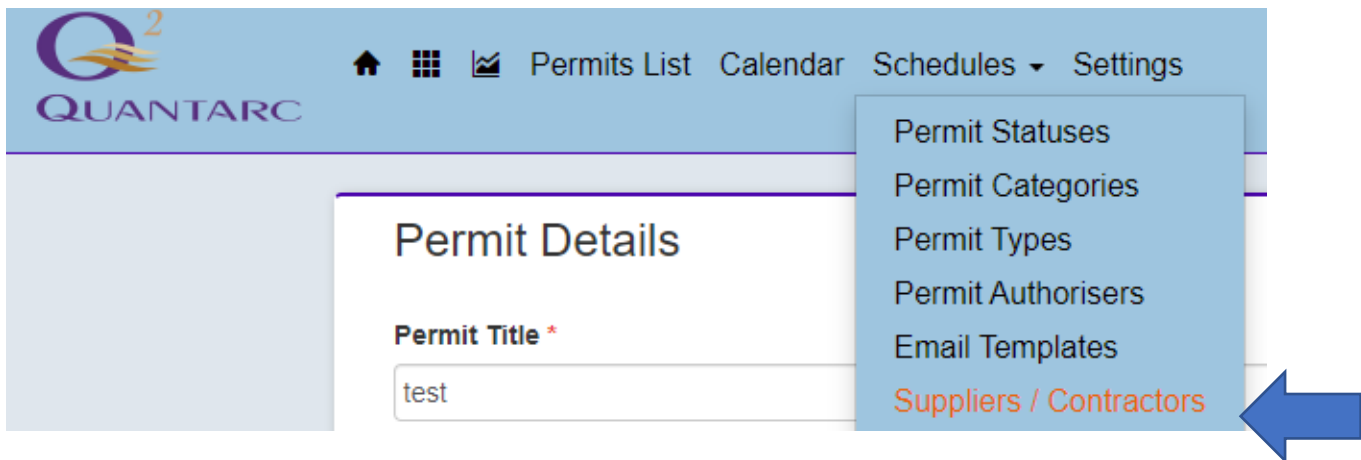The same permit will then be created however the below pages will need completing:

- Roles
- Permit Details
- Documents

Click 'Preparation complete' and 'Save changes'

Your clone has then been submitted for approval.

Adding new Suppliers / Contractors:

Click on 'Schedules', click the drop down and click 'Suppliers / Contractors'
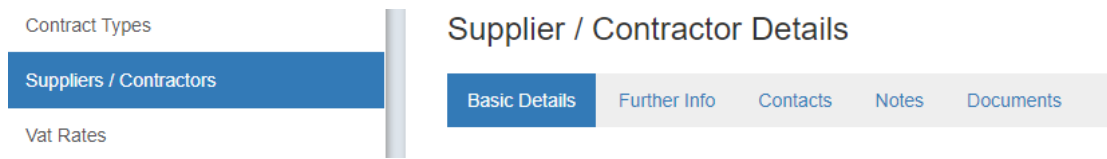

Click on the green button 'Add Supplier'

Enter the company name, tick 'Operational' and click the drop down for 'Supplier/Contractor Type' and confirm the Supplier/Contractor.

Click 'Save Changes'

New tabs will then appear

Go to the 'Contacts' tab and click the green 'Add' button.

Add the names and telephone numbers individually for the lead competent person (Receiving authority).

Click 'Save Changes'

Close the tab and continue with applying for your permit.

FAQ's:

- When should the Requester close their permit?

The permit should be closed on the final day of the permit.

- Weekend permits

If the permit starts during the week and is required for the weekend then please note this in the additional comments section under 'Permit Details'.

- Can you add more than one location on a permit ?

  Yes as long as it is for the same contractor/ DEL and for the same task.

- Can the requestor amend their permit once it has been submitted including extensions?

  No, any amendments need to be made by the permit office including extensions (or the permit can be rejected for you to make changes and re submit).

- Can contractors request permits?

  No, permits can only be requested by university staff.

- Do I need a roof permit if I am just carrying out an inspection?

  YES, if you are going onto any roof you require a permit regardless of what the task is.

- If I put a permit on Friday by 12 noon when would I expect to be able to receive the permit?

  We require 72hrs notice, 3 working days so you would receive the permit for the Wednesday morning to start work.
  We do require 10 – 20 working days for Permit to dig's , drones and confined spaces.