

Permit User Data Sharing Guide

Admin > User Data Sharing

- Users with **Admins > Data Sharing** permission can manage data sharing settings
- Share data with specific users from other clients in the same county
- Important limitations:
 - Only individual users can be added (not departments)
 - FD Admin users cannot be added for sharing

Partner User Settings

For each partner user, configure:

1. **Address Share Module**
 - Determines which modules can access shared addresses:
 - **Fire Inspection (Existing)** - Allows creating inspections only
 - **Fire Inspection/Permit (New)** - Allows creating both inspections and permits
 - **Permit (New)** - Allows creating permits only
2. **Permits**
 - **None** - Cannot view shared permits
 - **View** - Can view shared permits

Permits > Permit List

Where Permit List is Shown

The permit list is displayed in the following locations:

- Occupancy record > Permit tab
- Inspection > Permit tab
- Inspection > Link permit
- Invoice > Link permit

Permit List Display

The permit list will show permits that meet the following criteria:

- Permits created by the logged-in client where addresses are owned by them or not
- Permits created by other clients, but only when those clients have explicitly configured "Permits = View" for the logged-in user in the user data sharing settings

Creating Permits

Users with **Fire Permit – Create** permission will see:

- Address lookup showing:
 - Places from their own client
 - Places shared by other clients (with "Permit" or "Fire Inspection/Permit" access) that have "Not Shared Address" turned OFF

Cross-Client Permits

When creating a permit for another client's place:

- Uses permit types from the logged-in client
- Uses occupancy data from the place-owning client
- Confirm: field management permissions are from the logged-in client
- Permit ownership belongs to the logged-in client

Available Actions

- **Permit owners** (with proper permissions):
 - **FD Permits – Update** - Can edit the permit
 - **FD Permits – Delete** - Can delete the permit
- **Non-owners:**
 - Place owners - View-only access (eye icon)
 - Users with "Permit" = "View" sharing - View-only access (eye icon)
- View action opens the PDF permit report in a new tab

Permit Report PDF Generation

When generating the permit report PDF:

- Use the permit type from the client that created the permit
- Use the permit form from the client that created the permit
- Pull occupancy data/field names from the client that owns the place

Inspection > Permit Tab Behavior

When doing an inspection on an address from another client:

- Show the permit tab if the user has either:
 - "Address Share Module" = "Permit" OR "Fire Inspection/Permit" OR
 - "Permit" = "View"
- Enable permit creation and editing functionality if the user has:
 - "Address Share Module" = "Permit" OR "Fire Inspection/Permit"

- Users can create new permits or edit permits done by their own client
- Enable view-only access if the user has:
 - "Permit" = "View"
 - Users can view permits done by the other client on the place
- Disable permit creation if the user has:
 - "Permit" = "View" but NOT "Address Share Module" = "Permit" or "Fire Inspection/Permit"

Permit > Inspection Tab

When doing a permit on an address from another client:

- Show the inspection tab if the user has either:
 - "Address Share Module" = "Fire Inspection" OR "Fire Inspection/Permit" OR
 - "Inspections" = "View Only"
- Users can create new inspections or edit inspections done by their own client if the user has:
 - "Address Share Module" = "Fire Inspection" OR "Fire Inspection/Permit"
- Users can view inspections done by the other client on the place if the user has:
 - "Inspections" = "View Only"
- Disable inspection creation if the user has:
 - "Inspections" = "View Only" but NOT "Address Share Module" = "Fire Inspection" or "Fire Inspection/Permit"

Inspections > Inspection List

Creating Inspections

Users with **Fire Inspections – Create** permission will see:

- Address lookup showing:
 - Places from their own client
 - Places shared by other clients (with "Fire Inspection" or "Fire Inspection/Permit" access) that have "Not Shared Address" turned OFF