Reclassification of Permit Types (...after uploading local data to a server)

The QuickPermit+ utility "Reclassify Permit Types" may be used for each installation of QuickPermit+ (after having uploaded local data to your server). *This is only necessary when custom permit types have been defined* on either the server, the local machine, or both (i.e. resulting in mismatched Permit Type data).

Why is this necessary?

Because QuickPermit+ allows creation of custom Permit Types and installation of the program (locally) on multiple machines, users operating independently may have customized the list of available Permit Types on their machine while other users may have also customized their own lists. When the data from each separate installation of QuickPermit+ is uploaded to a server for shared access, the list of shared Permit Types must be the same for everyone. Additionally, the disparate Permit Types are appended to the historical record for each Work Permit that is issued. The process of manually editing the Permit Type applied to every Work Permit that has been issued would be very difficult – and this brings us to the answer *...To Save Time!*

Overview

When running the Upload to Server process the congruity of Permit Type data is checked automatically and you will be notified if reclassification is necessary by a prompt like this:
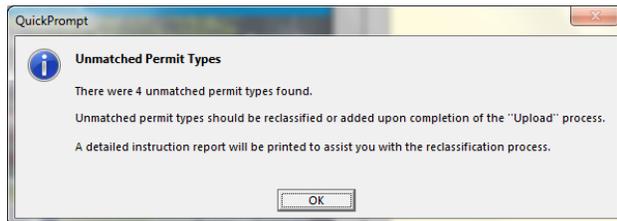

Note: Having incongruent Permit Types does not prevent the upload process from completing. However, when it's done, you will need to complete the steps to reclassify the Permit Types.

If reclassification is required a single page will be printed to your Windows default printer with general instructions on how to complete the reclassification process. More complete instructions will be discussed below.

At the completion of the Upload to Server process you'll need to open the "Permit Type Reclassification" form. To access the Permit Type Reclassification form:

- Use the Menu Bar on the program's Main Switchboard and select:
  - Utilities >> Data >> Reclassify Permit Types

Permit Type Reclassification Form
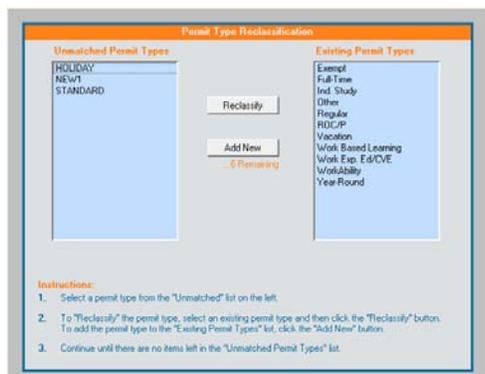
- The left-hand list reflects Permit Types that are local to the machine.
- The right-hand list reflects the current server list of Permit Types.
- Reclassification only affects the server data (right-hand list).

Decide whether a Permit Type (in the left-hand column) should be reclassified into one of the existing Permit Types in the right-hand column (i.e. "Holiday" and "Vacation" are similar as are "Standard" and "Regular", and probably should be reclassified).

Permit Types appearing in the left-hand list that don't have a logical corresponding type in the right-hand column should probably be added to the list of available Permit Types (a maximum of 17 types are allowed).

To Reclassify a Permit Type:

- Select an item in the left-hand list (i.e. "Holiday")
- Select the item in the right-hand list that you want it reclassified as (i.e. "Vacation")
- Click the "Reclassify" button

This will cause all local data having the Permit Type "Holiday" to be merged into the server data file as "Vacation". This change will be applied to all uploaded local work permit records having been originally issued as "Holiday".
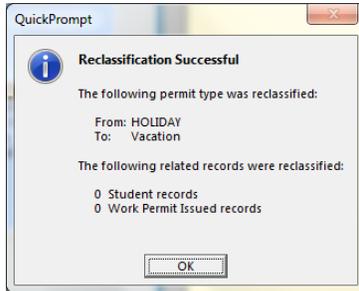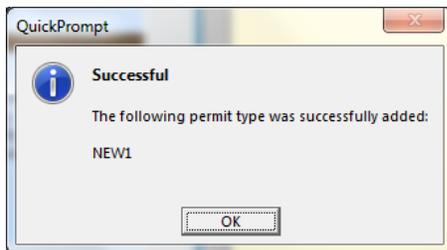

This prompt will be displayed after a Permit Type has been "Reclassfied".

It will show the number of uploaded related records that were affected by the change. In this example, no associated records were affected -- not likely the case when you reclassify a Permit Type.
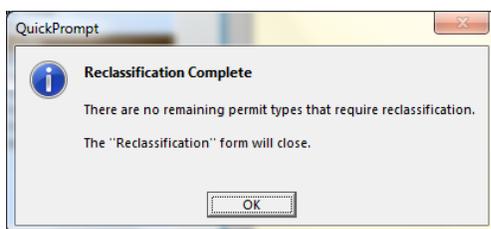
To Add a New Permit Type:

- Select an item in the left-hand list (i.e. "New1")
- Click the "Add New" button

This will add a new Permit Type to the list of available Permit Types on the server. All local data having the Permit Type "New1" will be uploaded without changing related work permit records.

This prompt will be displayed after a Permit Type has been "Added", confirming the change that was made to the list of available Permit Types on the server.

Upon completion, this final prompt will be displayed:

Congratulations *...you're done!*