

# Customer Portal Series

## How to: Working with Project Functionality

The customer portal has a built-in function to help customers organize their permit applications into folders. The permits can be organized or grouped in folders according to the needs of the customer; by location, but client, by type etc.

Use of this feature is optional at the discretion of the account owner. The municipality does not use the project folder information and the folders do not impact how the permit applications are processed or prioritized.

The permit file will indicate the folder number if the permit is in a project, however management and visibility in the folders is available only to the account owner -even if the account owner is associated with other contractors. Therefore, the folders are not shareable across an organization.

If you wish to use the project function the follow steps walk through how to create the folders, add permits to the folders and manage the folders from your customer portal account.

### Create a Project

1. From the landing page, select the My Projects tab.

**HALIFAX** Welcome, Home Search Pay My Payments Profile Sign Out

## Home

**Welcome to Halifax Regional Municipality's Online Permitting System**

Manage your permits via the tabs below. Track your permit in the My Activities tab. Check often for updates.  
If your permit does not appear in the tabs below, use the Search in the menu above to retrieve your permit.

**Permitting**

- > Apply for a Permit
- > Estimate Fees
- > Inquiries

**MY INSPECTIONS** MY ACTIVITIES **MY PROJECTS** MY BUSINESSES

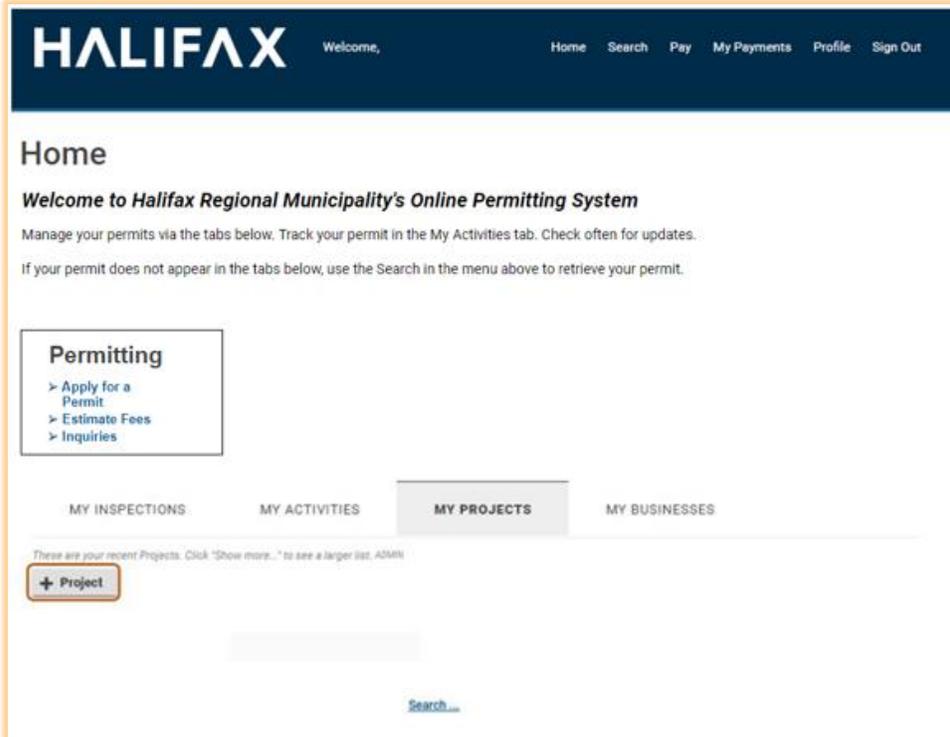
Your inspections are listed here. Sort by selecting column title or use the search function.

Inspection Number	Result	Next Action	Inspection Discipline	Requested Date	Scheduled Date	Location	View Permit
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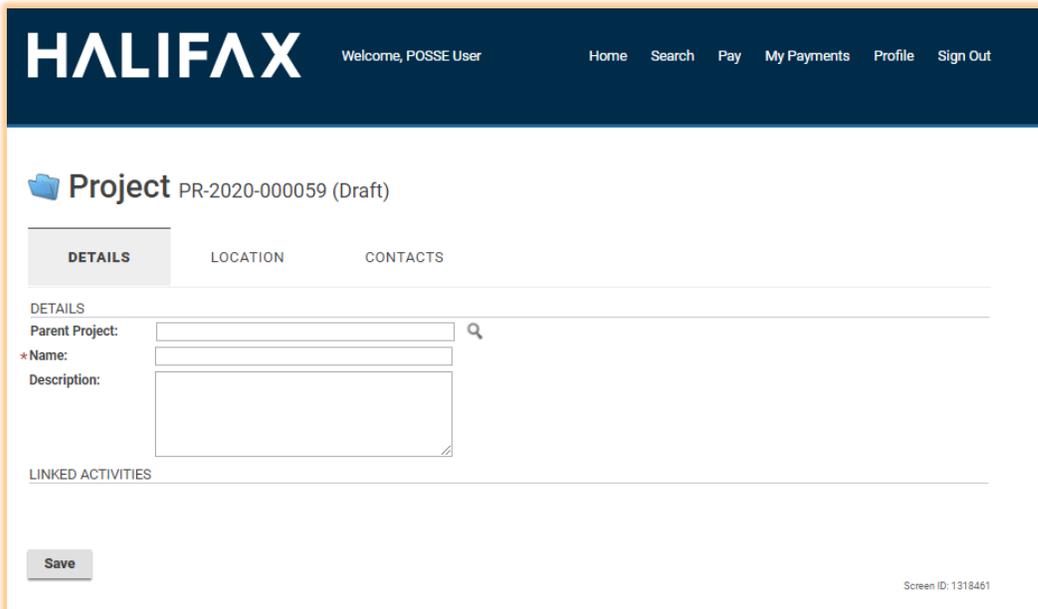
Search...

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2. To add a project, click the +Project button.

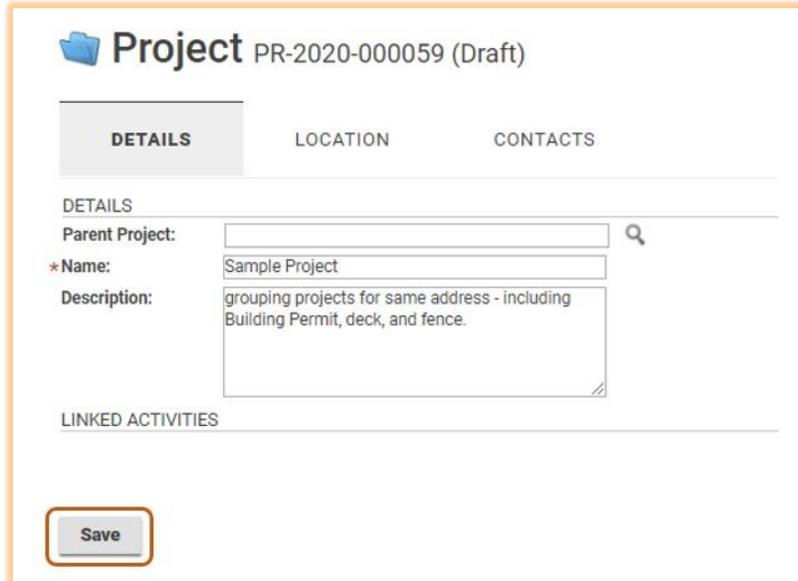


3. Enter the Name of the Project.  
There is already a project folder and you wish to create a sub-folder, enter the existing project folder name in the Parent Project field, and the name of the new sub-project in the name field.  
Enter a description of the project in the description field to provide further context.



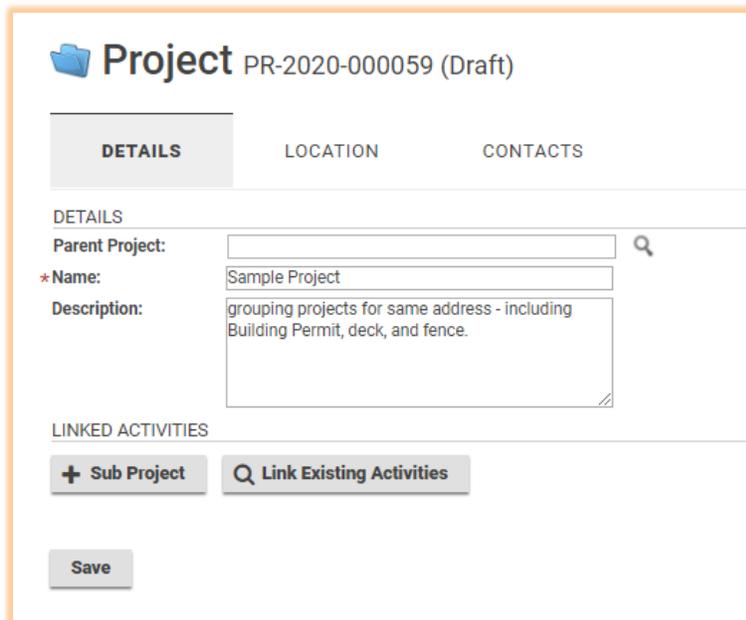
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4. Click Save.



The screenshot shows a web interface for a project titled "Project PR-2020-000059 (Draft)". It features three tabs: "DETAILS", "LOCATION", and "CONTACTS". The "DETAILS" tab is active. Below the tabs, there are input fields for "Parent Project", "\*Name" (containing "Sample Project"), and "Description" (containing "grouping projects for same address - including Building Permit, deck, and fence."). A "Save" button is highlighted with a red border at the bottom left of the form.

5. Once a project folder is created the system reveals the buttons that allow you manage Project folder contents.  
You can create sub-folders, or you can add existing permit applications to the project folder.

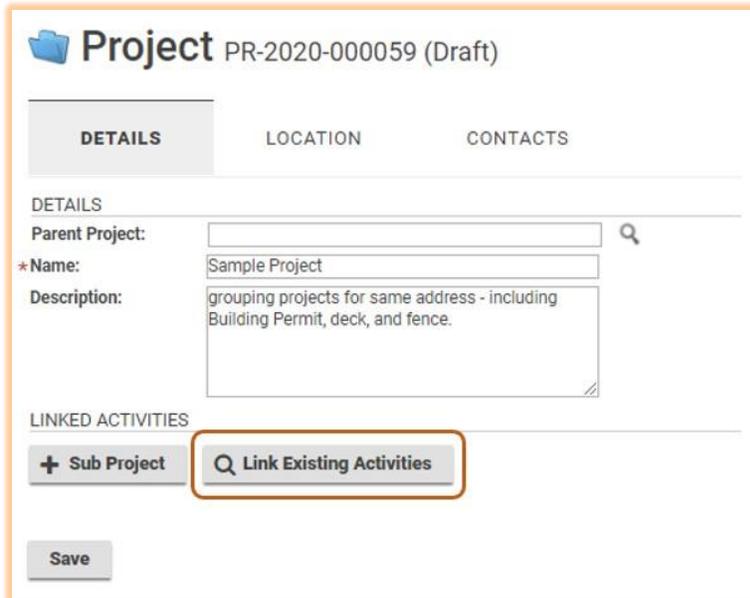


This screenshot shows the same project details form as above, but with additional management options. Under the "LINKED ACTIVITIES" section, there are two buttons: "+ Sub Project" and "Link Existing Activities". A "Save" button is also visible at the bottom left.

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## Add Permits to a Project

6. Click “Link Existing Activities” button.



Project PR-2020-000059 (Draft)

DETAILS LOCATION CONTACTS

DETAILS

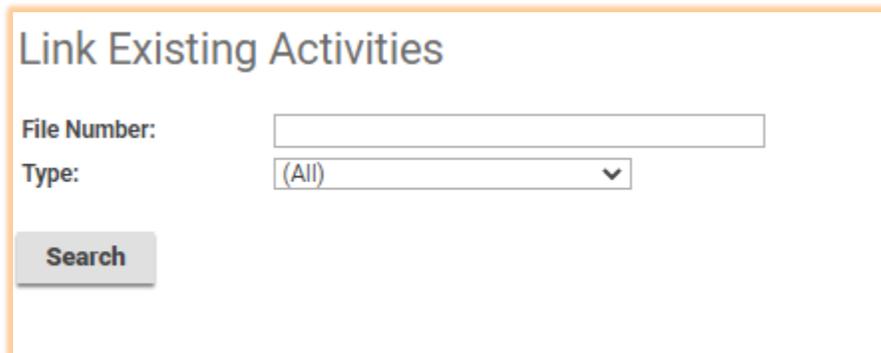
Parent Project:

\*Name:

Description:

LINKED ACTIVITIES

7. From the popup, enter all or part of the file number (permit number) of the permits you wish to add to the project and click Search.



Link Existing Activities

File Number:

Type:

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8. A File Number is required, the Type is optional.  
Click Search.

### Link Existing Activities

**File Number:**

**Type:**

- (All)
- Project
- Building Permit
- Water Permit
- General Permit
- Electrical Permit
- Mechanical Permit
- Site Improvement Plan
- Subdivision
- Use By Special Review
- Pre-submittal
- Variance and Appeals
- Rezoning
- Development Permit
- Business License Amendment
- Business License Application
- Business License Renewal

9. Check the box beside the permit from the search results and click Select.

### Link Existing Activities

 BP-2020-01243: In Review (Residential - Dwelling - Single Detached - New Building)  
77 BRUNELLO BLVD, TIMBERLEA, NS (POSSE User)

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10. The permit is added to the project. Repeat for all permits you wish to associate to the project.

**Project** PR-2020-000059 (Draft)

**DETAILS** LOCATION CONTACTS

DETAILS

Parent Project:  🔍

\* Name:

Description:

LINKED ACTIVITIES

**+ Sub Project** **🔍 Link Existing Activities**

BP-2020-01243: In Review (Residential - Dwelling - Single Detached - New Building)  
77 BRUNELLO BLVD, TIMBERLEA, NS (POSSE User) **✖**

**Save**

You can remove a permit from the project by clicking the red X.

**Save the Project.**

**Note:** unlike permit applications, Project Folders will remain in Draft at all times.

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## Manage your Projects - Using The Project Tabs

1. My Projects Tab: this tab is visible at all times on the customer portal dashboard.
  - Once a project folder is created it will be listed in this tab and the permit applications within it are easily accessible.
  - From this tab you can manage and create new projects.

The screenshot shows the 'Home' page of the Halifax Regional Municipality's Online Permitting System. At the top, there is a 'Home' heading and a welcome message: 'Welcome to Halifax Regional Municipality's Online Permitting System'. Below this, there are instructions: 'Manage your permits via the tabs below. Track your permit in the My Activities tab. Check often for updates.' and 'If your permit does not appear in the tabs below, use the Search in the menu above to retrieve your permit.' A 'Permitting' sidebar menu is visible on the left, containing 'Apply for a Permit', 'Estimate Fees', and 'Inquiries'. The main navigation tabs are 'MY INSPECTIONS', 'MY ACTIVITIES', 'MY PROJECTS' (which is highlighted), and 'MY BUSINESSES'. Below the tabs, there is a section titled 'Use the project function to organize and group your permits. Create as many project folders as required.' followed by 'The use of project folders has no impact on the permitting process, it is solely for customer use.' A '+ Project' button is located above a list of project folders: 'PR-2021-000035 (Active) Nadia Drive Townhouse 1', 'PR-2021-000039 (Draft) project #1', 'PR-2021-000041 (Draft) today's demo', and 'PR-2021-000042 (Draft) Test 123'. A 'Search...' link is at the bottom right of the project list.

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- From My Project Tab, clicking a project folder will open the project further.
  - Each tab allows you to manage an aspect of the project-related information.
  - Remove permits from the project folder by clicking the red (X) (this does not delete the permit application. It only removes it from the project folder).

**Project** PR-2020-000035 (Draft)

DETAILS PROJECT ACTIVITY LOCATION CONTACTS

DETAILS

Parent Project:

\*Name:

Description:

LINKED ACTIVITIES

+ Sub Project

	GP-2020-00119: Mobile Home Completed (Residential - Mobile Home - install a new mini home) 4 SILVER TERR, BEDFORD, B4A3R8 (POSSE User)	✖
	GP-2020-00148: Mobile Home Draft (Residential - Mobile Home - install new mini home) 9 RUSSELL RD, CLAM HARBOUR, NS B0J1Y0 (POSSE User)	✖
	GP-2020-00149: Mobile Home Completed (Residential - Mobile Home - install a new mini home) 51 BUMPY LANE, LAKE ECHO, B3E1B8 (POSSE User)	✖

Save

### 3. The Details Tab:

- Shows the project folder name
- Shows the description added during folder creation
- Shows any subfolders within the project folder
- Lists all permit applications linked to the project with their job description.

Individual permit files can be opened by clicking the rectangle icon beside the permit.

**Project** PR-2021-000035 (Active)

DETAILS PROJECT ACTIVITY LOCATION CONTACTS

DETAILS

Parent Project:

\*Name:

Description:

LINKED ACTIVITIES

	BP-2021-00033: Ready For Issue (Residential - Dwelling - Townhouse - New Building) 44 NADIA DR, DARTMOUTH, NS B3A0A6 (Jason Thibeau)	
	GP-2021-00100: Sub - Townhouse Ready For Issue (Residential - Sub - Townhouse - Sub Permit for BP-2020-000033 Construct Four Unit Townhouse - Unit 2) 46 NADIA DR, DARTMOUTH, NS B3A0A6 (Jason Thibeau)	

Save

Screen ID: 1318461

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## 4. Project Activity Tab:

- Shows all permit files within the folder
- Allows access to any subfolders.

The screenshot shows the 'Project Activity' tab selected for a project named 'Project PR-2020-000035 (Draft)'. The tab is highlighted with a red box. Below the tabs, there is a list of permit files with their details, including permit numbers, descriptions, and dates. A 'Save' button is visible at the bottom left, and a screen ID '1475585' is at the bottom right.

**Project** PR-2020-000035 (Draft)

DETAILS **PROJECT ACTIVITY** LOCATION CONTACTS

Project: PR-2020-000035 (Draft) Mobile Homes in Progress

- General Permit: GP-2020-00119: Mobile Home Completed (Residential - Mobile Home - install a new mini home) 4 SILVER TERR, BEDFORD, B4A3R8 (POSSE User), Created: June 09, 2020, Issued: June 09, 2020, Completed: June 09, 2020
- General Permit: GP-2020-00148: Mobile Home Draft (Residential - Mobile Home - install new mini home) 9 RUSSELL RD, CLAM HARBOUR, NS B0J1Y0 (POSSE User), Created: June 10, 2020
- General Permit: GP-2020-00149: Mobile Home Completed (Residential - Mobile Home - install a new mini home) 51 BUMPY LANE, LAKE ECHO, B3E1B8 (POSSE User), Created: June 10, 2020, Issued: June 10, 2020, Completed: June 10, 2020

Save

Screen ID: 1475585

## 5. Location Tab:

The location tab provides parcel information for each permit.

If the permits are from different parcels, multiple parcels will be listed.

The screenshot shows the 'Location' tab selected for the same project. The tab is highlighted with a red box. Below the tabs, there is a list of parcel information, including parcel numbers and addresses. A 'Save' button is visible at the bottom left.

**Project** PR-2020-000035 (Draft)

DETAILS PROJECT ACTIVITY **LOCATION** CONTACTS

Parcel

- 00-604-140  
9 RUSSELL RD, CLAM HARBOUR, B0J1Y0
- 40-438-053  
4 SILVER TERR, BEDFORD, B4A3R8
- 40-505-448  
51 BUMPY LANE, LAKE ECHO, B3E1B8

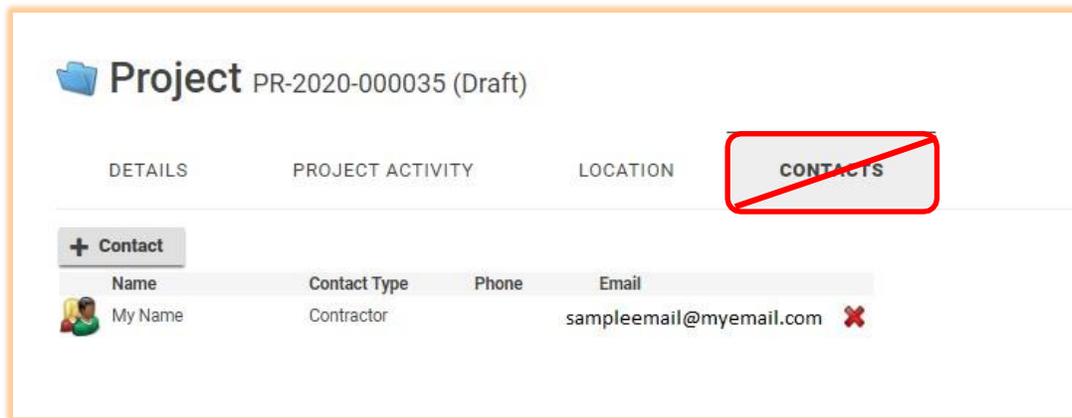
Save

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## 6. Contacts Tab:

The Contacts Tab allows contact information to be added to the project folder.

**NOTE:** The Project Function is only used by you as the customer portal account owner, therefore any information stored here is only visible to you and will not be communicated to the municipality or to associated contractors. This tab is optional and for your use only.



The screenshot shows a project interface for "Project PR-2020-000035 (Draft)". At the top, there are four tabs: "DETAILS", "PROJECT ACTIVITY", "LOCATION", and "CONTACTS". The "CONTACTS" tab is highlighted with a red box. Below the tabs, there is a "+ Contact" button and a table with the following data:

Name	Contact Type	Phone	Email
 My Name	Contractor		sampleemail@myemail.com 