EXTERNAL PROJECT – Customer Portal

Introduction To External Project

Customers may choose to organize or group permit, planning and license applications into Project Folders for easy cross-referencing. This allows all related jobs to be viewed in one place.

There is no impact to how the My Activities Tab works if the Project function is used. It is simply another way to view / access related jobs.

Projects can be used to group jobs by PID, project, region, project manager or any other organizational structure that works for the customer.

To support co-management of applications within a company or team, Projects can be “Shared with Contractor” by the Project Owner. This will allow all users associated with the contracting company (associated contractors) to view and edit the project.

Project Owner may opt to keep the project private by not sharing with the contractor account.

Customers can only search, view and edit projects when they are the project owner or the project is shared with the contracting company they are associated with. As a reminder, customers can only associate to one contracting company at a time.

Jobs can be added to a project at any time.

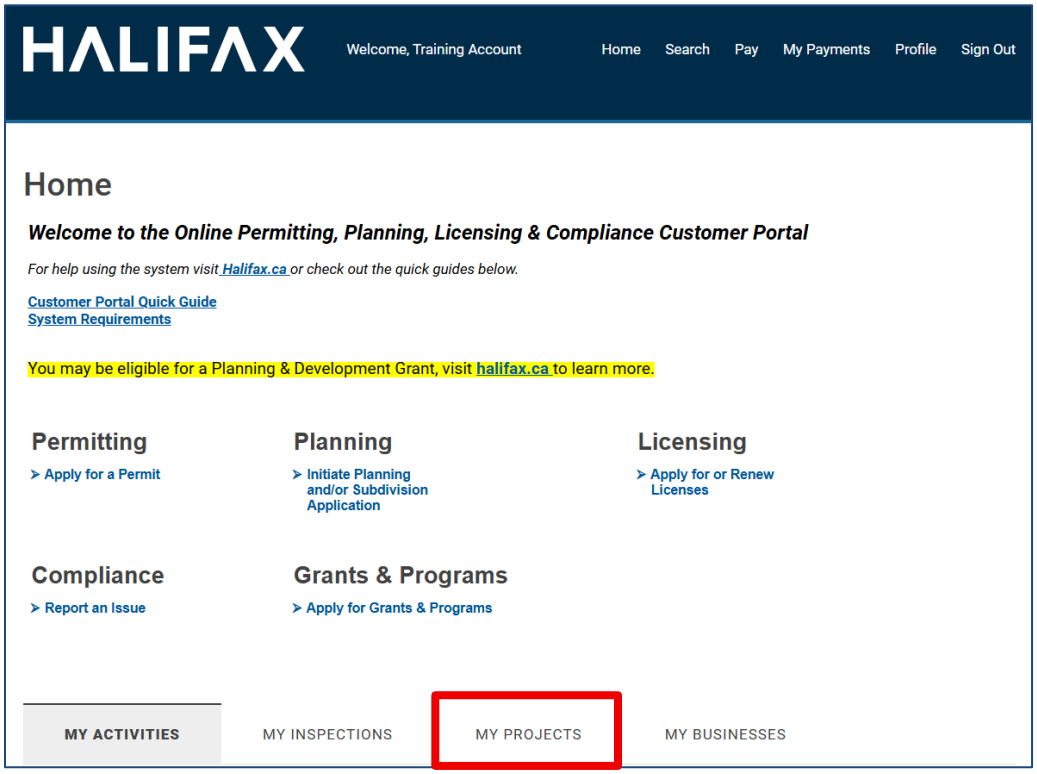
- All contractors who have access to the project folder can add jobs to the project folder.
- Applications can be linked to the project in the application wizard prior to submission.
- Applications can be linked to the project at any time during review process.
- Issued and completed permits can be linked to a Project from within the Project.
- Jobs can be linked to more than one project at a time, if required

CUSTOMER PORTAL

Creating a New External Project

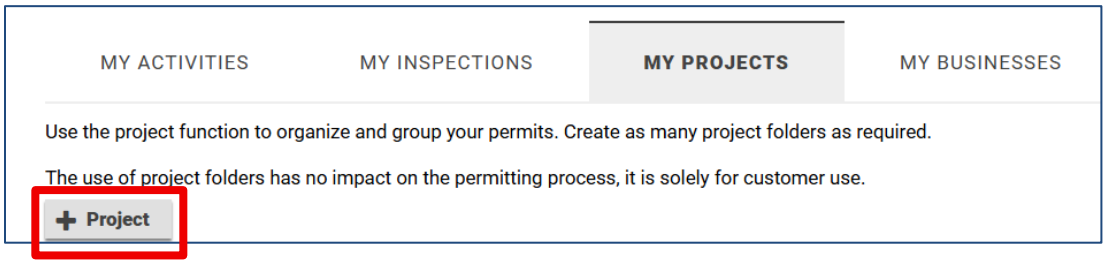
1. Open 'My Projects'

From the **Home Page** of the Customer Portal open the My Projects tab.



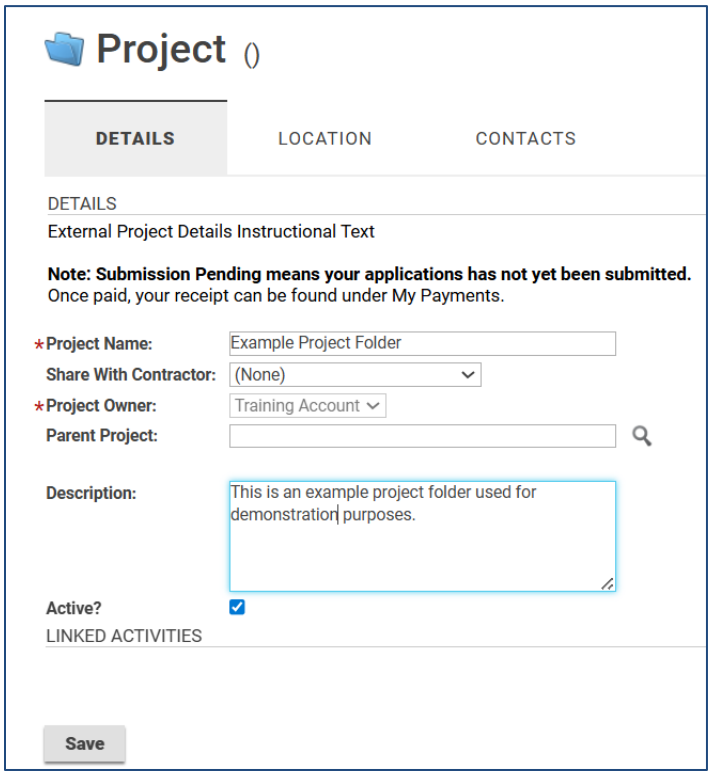
2. Create New Project

Select the **[+Project]** button to open a new Project Template



3. Project Details

Enter project details for the new project folder.
All fields with an *asterisk are required fields.



The Project Owner field will auto-populate with your name.

If associated with a contracting company, you can choose to "share with contractor".

- This allows others in the contracting company to see / access the project folder and its contents.
- If you share the project, you can also assign a different owner within the company.

Projects are created as ACTIVE, meaning jobs can be added / managed within.

When all jobs within the project are completed, the Project can be made INACTIVE to allow better filtering / sorting.

4. Save Project

Hit **Save** to complete the project creation step.

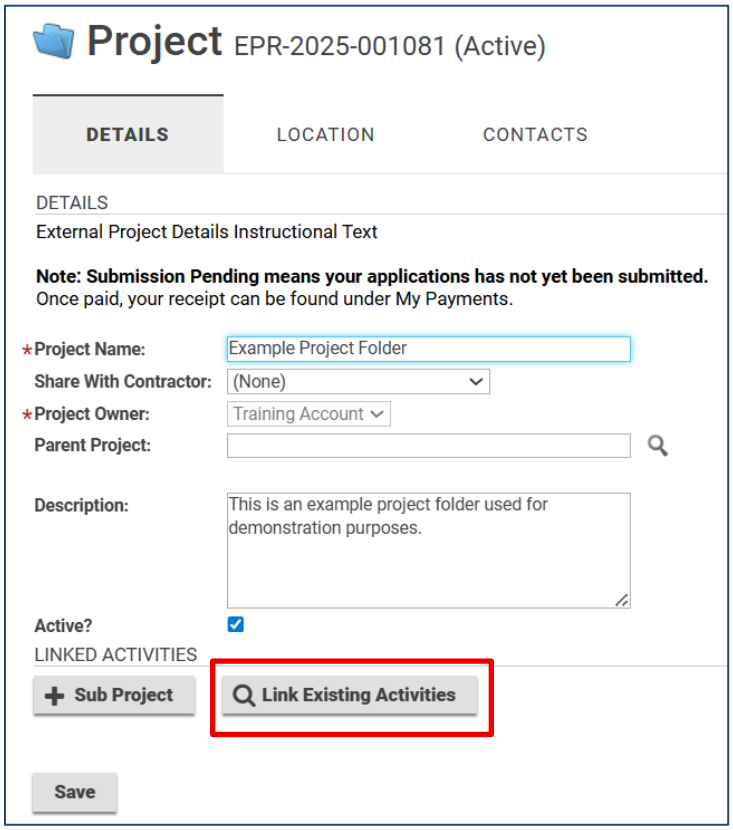
A unique project number is created, and the Project is now **Active**, meaning it is ready for applications to be added.

5. Add to Project – Existing Applications

Planning, permitting and licensing applications can all be added to projects.

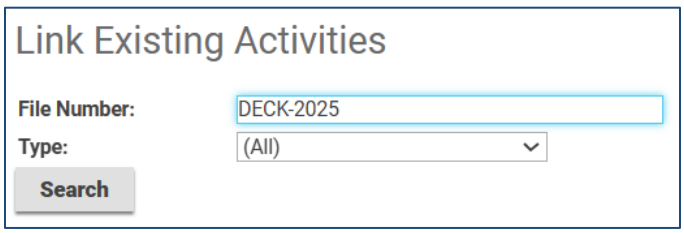
If the application already exists it can be linked to the project using the 'Link Existing Activities' button.

A. Select 'Link Existing Activities'

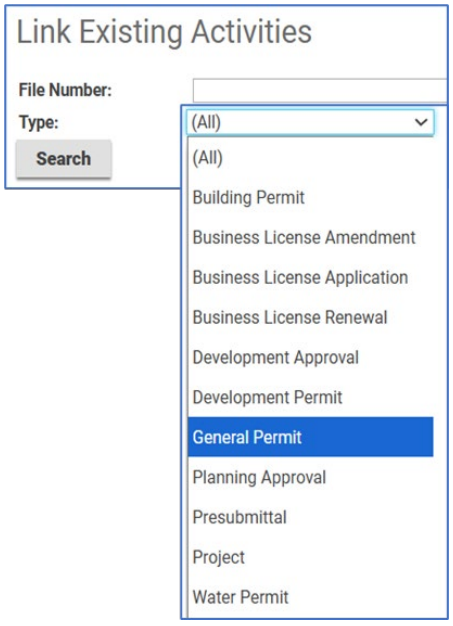


B. Provide search criteria

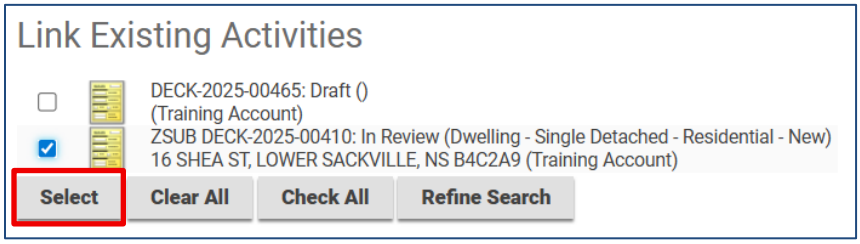
Enter all or part of the **File Number** of the application you want to add to the project.



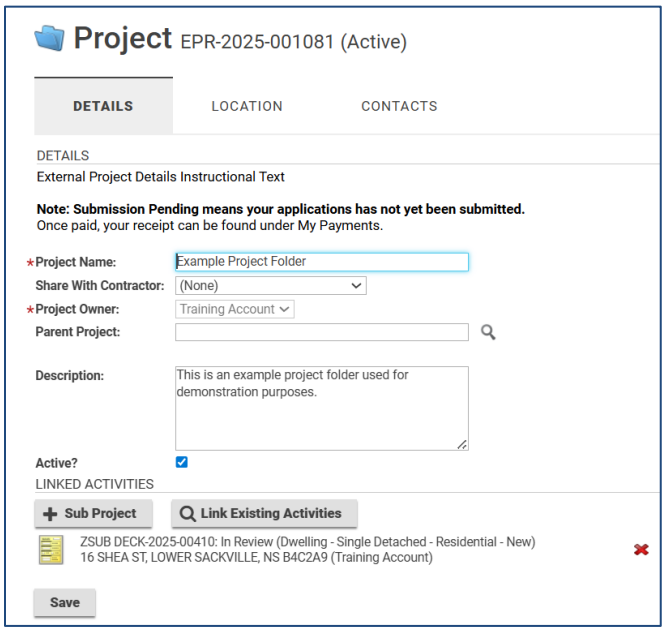
The search can be refined by selecting the application type from the drop-down list.



C. Check the correct application from the search results returned and hit ‘Select’.



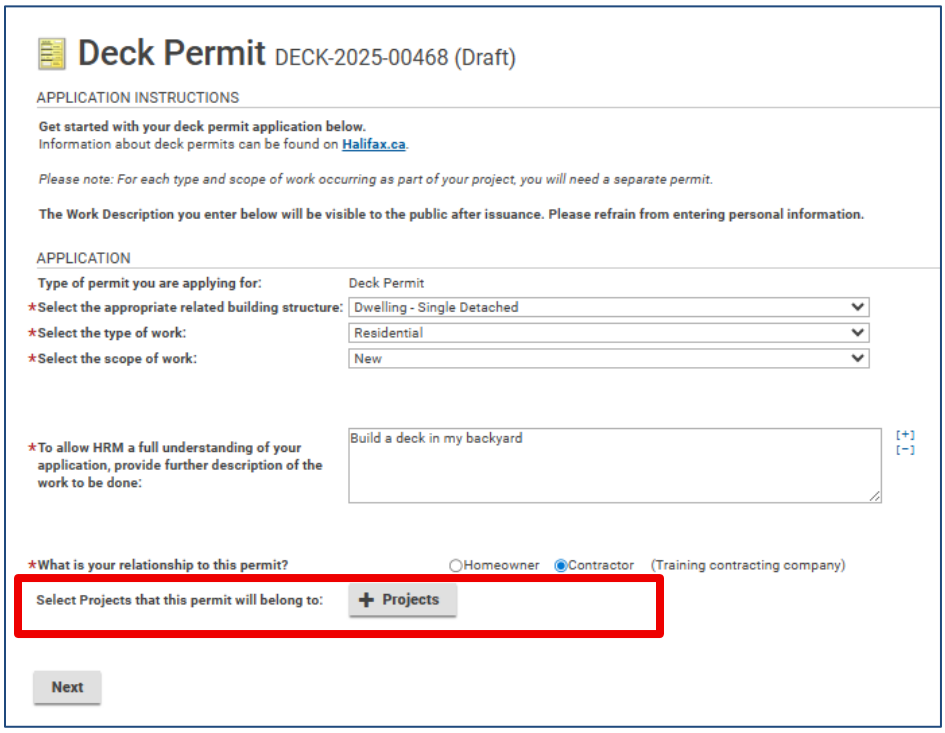
D. The application is now related to the Project.



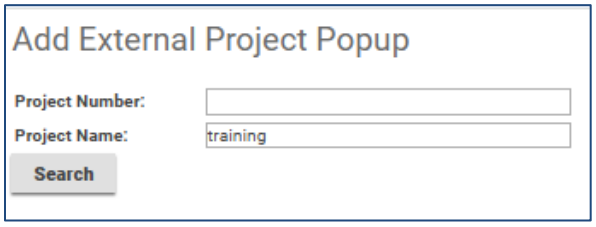
6. Add to Project – New Applications

Applications can be added to a project from within the application wizard as the application is being created

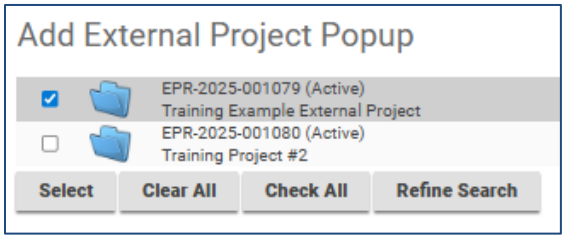
A. On the first page of the application wizard there is a field titled:
"Select project that this permit will belong to:"
click the [+Project] button



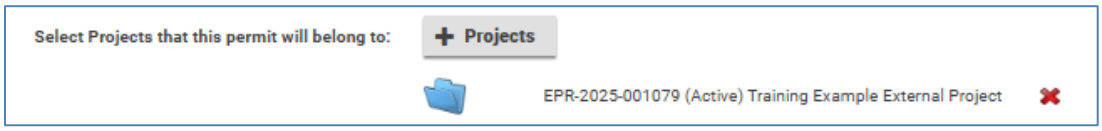
B. Enter the project number or search for the project, by project name



C. Check the correct project from the results returned and hit select.



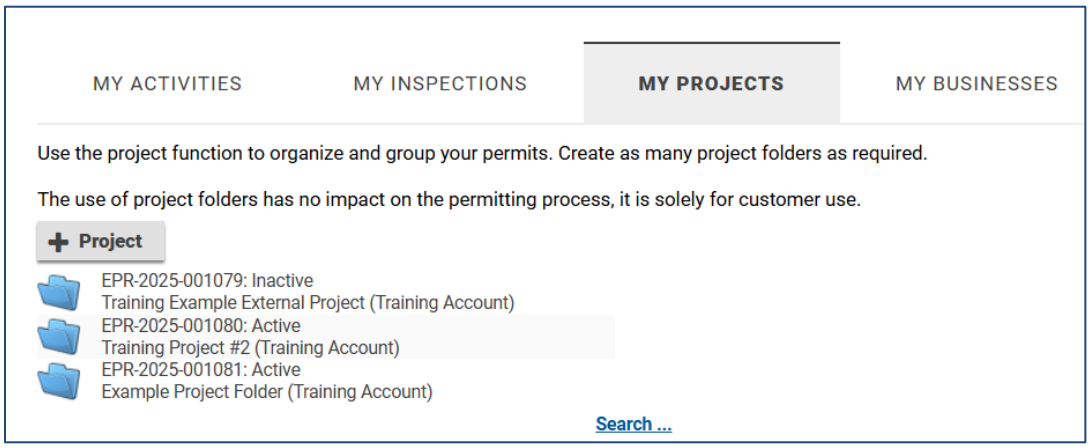
D. The new application is now linked to the selected Project.



7. Using 'My Projects'

From the Home Page – My Projects Tab you can see all Active and Inactive Projects that you have access to.

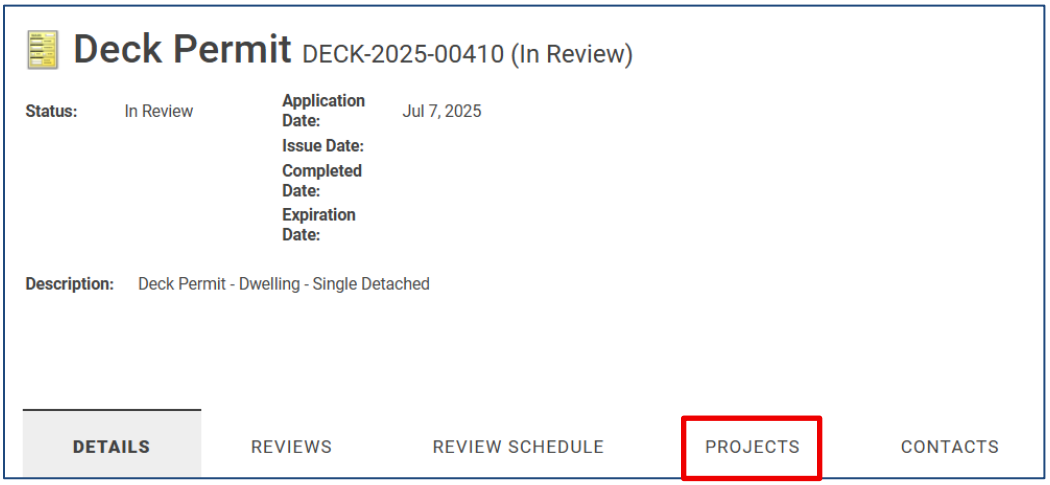
Click on the project name to open the project and see its contents.



8. Accessing the Project from the Application

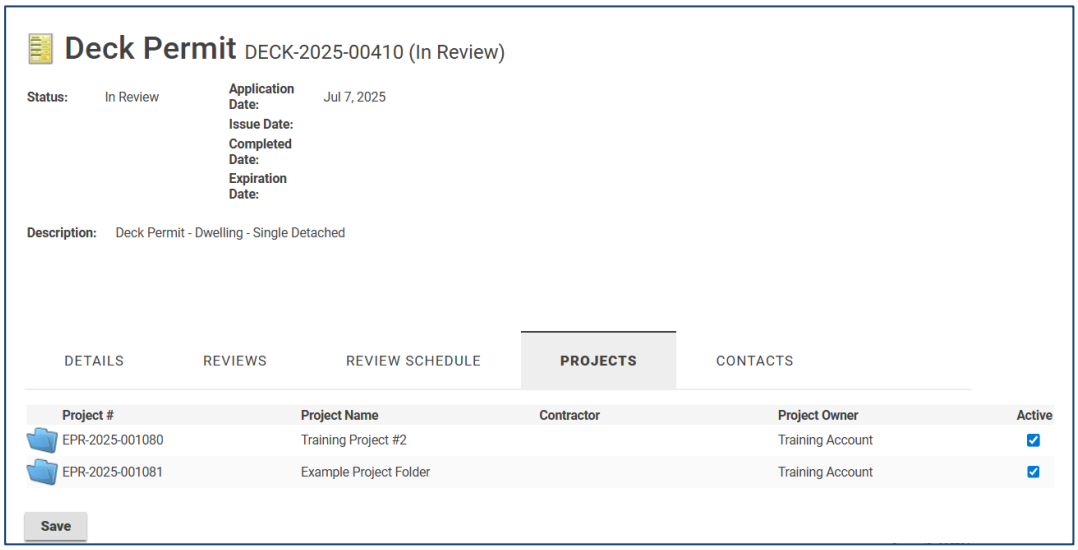
A. By default, when you open an application from the My Activities tab it will open to the Details tab of the file.

The Project Tab is located to the right.



B. Open the Projects Tab to see a list of Projects related to the application.

In the example below we can see this permit is related to two different projects. Both projects are listed and both projects can be opened from this tab.

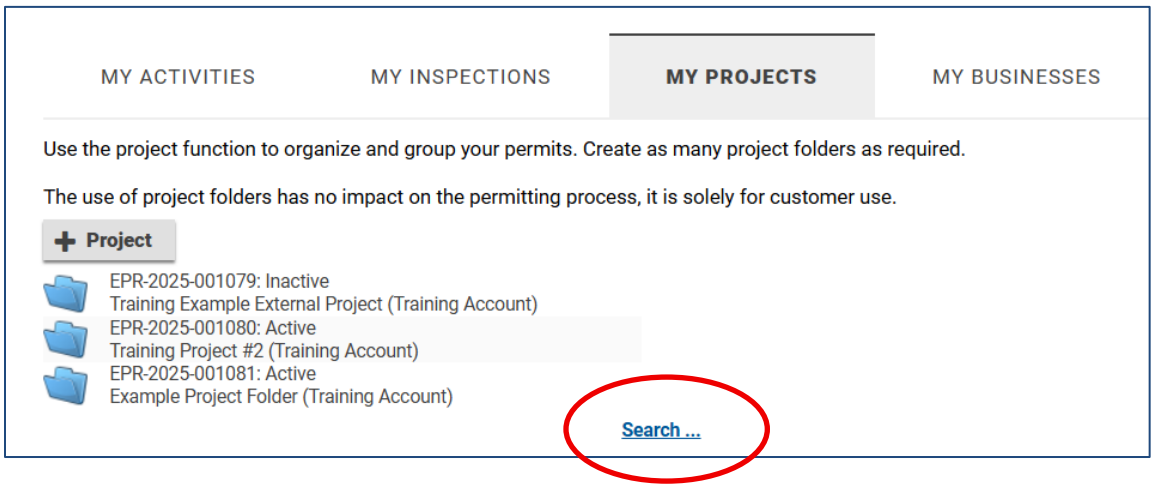


9. Searching Projects

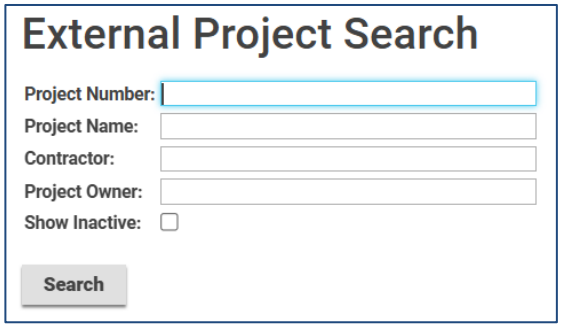
From the Home Page - My Projects Tab, a project search can be initiated.

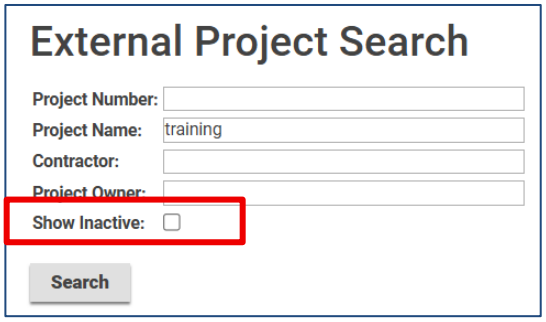
The search will return all projects that you have access to either as the project owner or because you are associated to the contracting company listed on the project and the project has been shared / made accessible to all associated contractors.

A. Open the Search



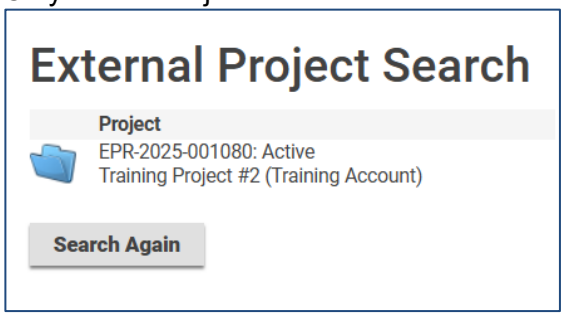
B. There are five search criteria to help filter / refine the search.
Enter all or part of the most relevant criteria.



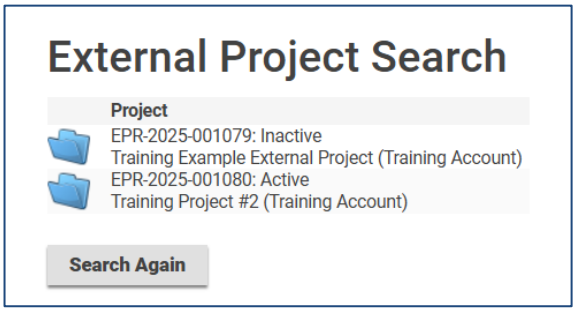


By default, the search is limited to only active projects but can include active and inactive projects by selecting 'Show Inactive' in the search criteria.

Only Active Projects



"Show Inactive" selected

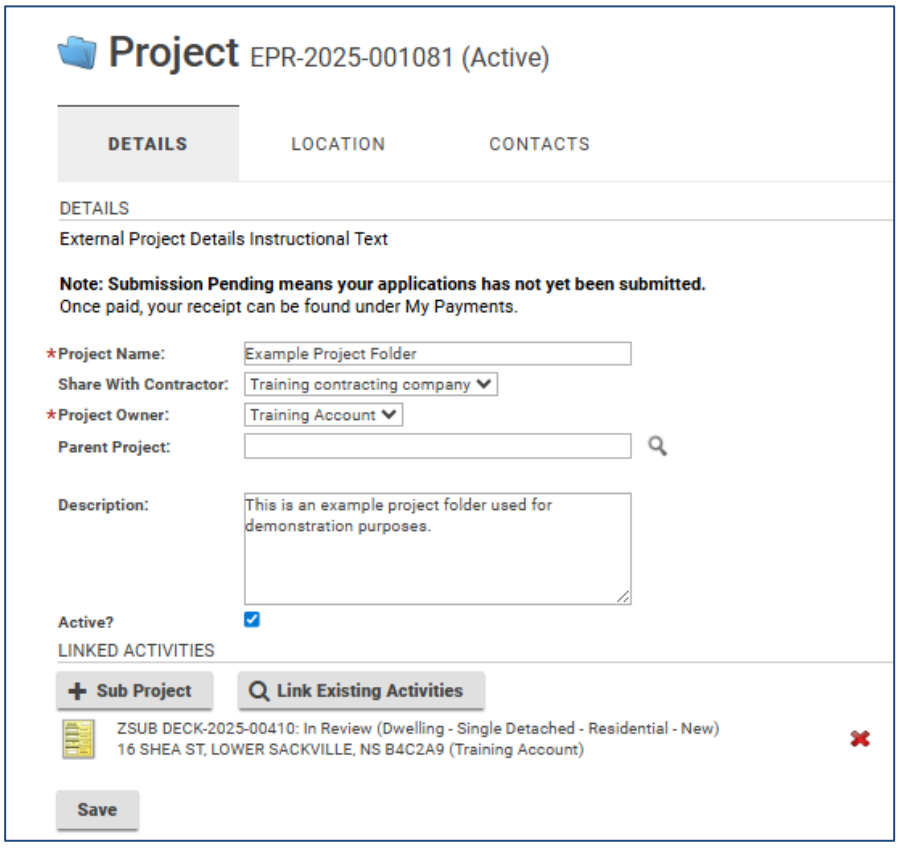


10. Project Owner

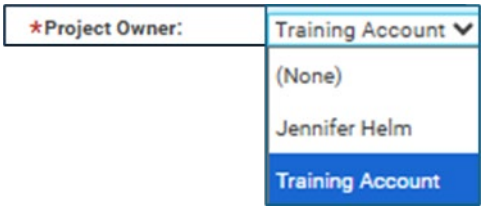
The project owner can be changed if the current owner is associated with a contracting company, and the project is shared with that company. Any person associated with the contracting company can be made the new Project Owner.

A. Open the project

B. Ensure to Contracting Company is selected as “Share With Contractor”
This setting controls visibility and access to the Project Folder. If the Project Folder is not shared, only the project owner can see / access the project.



C. Select the new project owner from the dropdown list in that field.
All “Associated Contractors” linked to the contractor company will be listed.



In this example the current Project Owner is ‘Training Account’. Jennifer Helm is associated with the Contractor Company and can be selected as the New Project Owner.
*The project owner does not impact or control visibility or access to the Project Folder.