

# CUSTOMER PORTAL

## 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.

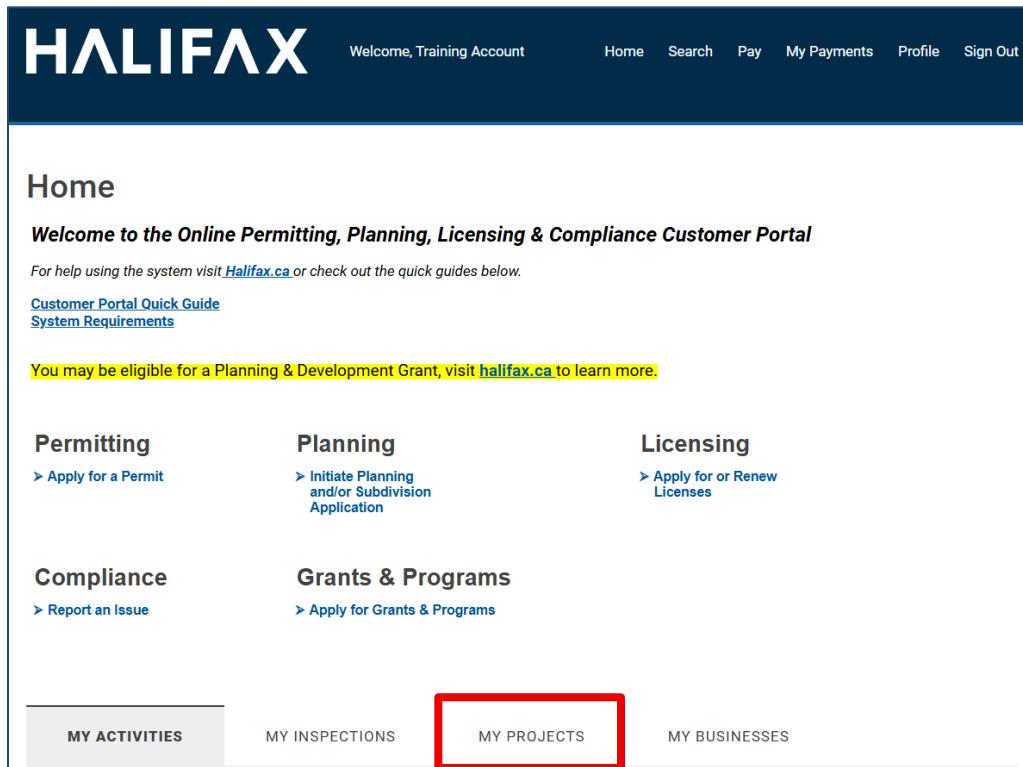
- All contractors who have access to the project folder can add jobs to the project folder.
- Applications can be linked to the project in the application wizard prior to submission.
- Applications can be linked to the project at any time during review process.
- Issued and completed permits can be linked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

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## Creating a New External Project

### 1. Open 'My Projects'

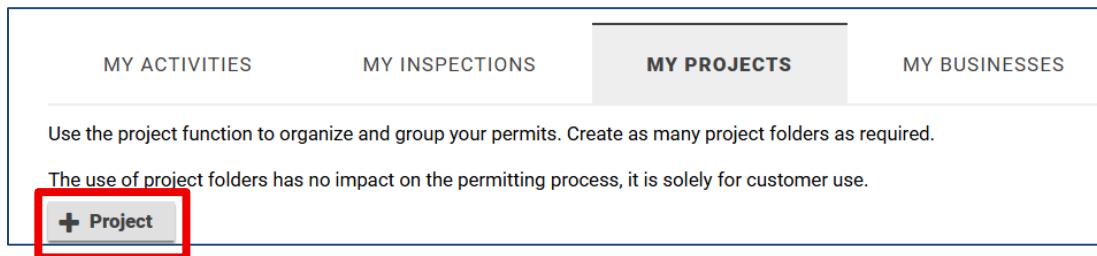
From the **Home Page** of the Customer Portal open the My Projects tab.



The screenshot shows the Halifax Customer Portal Home page. At the top, there is a navigation bar with the Halifax logo, a 'Welcome, Training Account' link, and menu items: Home, Search, Pay, My Payments, Profile, and Sign Out. Below the navigation bar, the page title is 'Home' and the sub-title is 'Welcome to the Online Permitting, Planning, Licensing & Compliance Customer Portal'. There are links for 'Customer Portal Quick Guide' and 'System Requirements'. A note mentions a 'Planning & Development Grant' available on [halifax.ca](http://halifax.ca). The main content area is divided into sections: 'Permitting' (with 'Apply for a Permit'), 'Planning' (with 'Initiate Planning and/or Subdivision Application'), 'Licensing' (with 'Apply for or Renew Licenses'), 'Compliance' (with 'Report an Issue'), and 'Grants & Programs' (with 'Apply for Grants & Programs'). At the bottom, there is a navigation bar with tabs: MY ACTIVITIES, MY INSPECTIONS, MY PROJECTS (which is highlighted with a red box), and MY BUSINESSES.

### 2. Create New Project

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

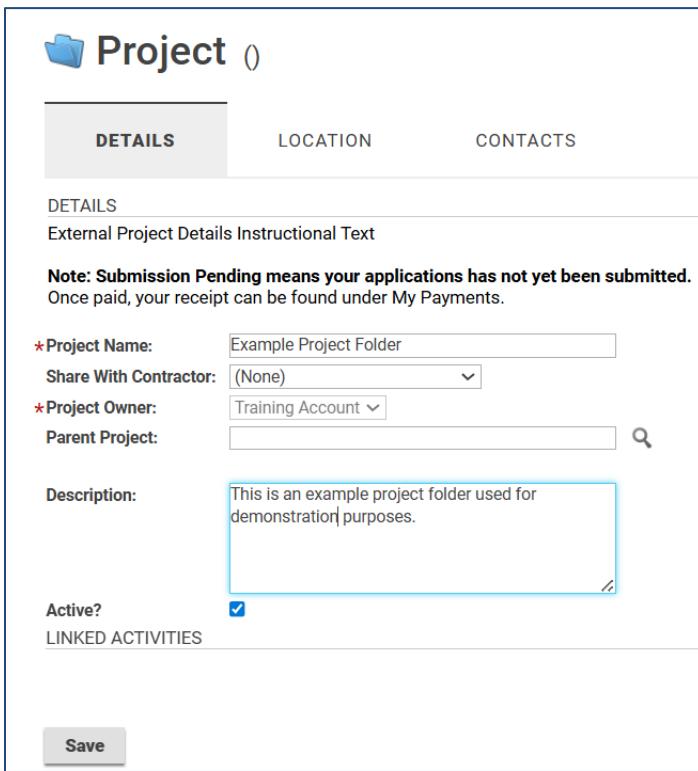


The screenshot shows the 'MY PROJECTS' tab in the Customer Portal. The tab is highlighted with a red box. Below the tab, there is a descriptive text: 'Use the project function to organize and group your permits. Create as many project folders as required.' and 'The use of project folders has no impact on the permitting process, it is solely for customer use.' At the bottom left of the content area, there is a button labeled '+ Project' with a red box around it.

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## 3. Project Details

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



The screenshot shows a 'Project' creation form with the following fields:

- Project Name:** Example Project Folder
- Share With Contractor:** (None)
- Project Owner:** Training Account
- Description:** This is an example project folder used for demonstration purposes.
- Active?**

At the bottom is a **Save** button.

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.



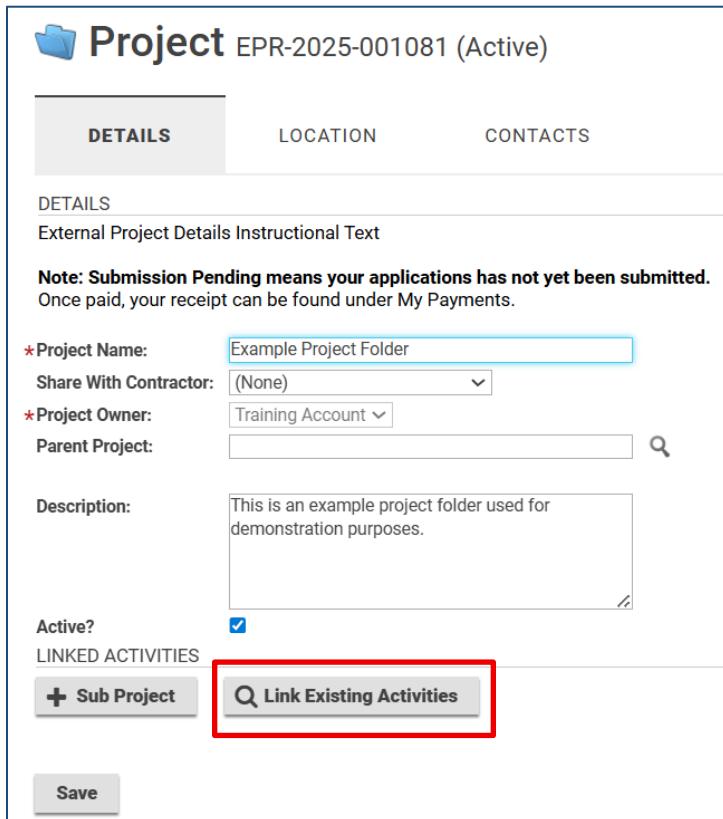
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## 5. Add to Project – Existing Applications

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.

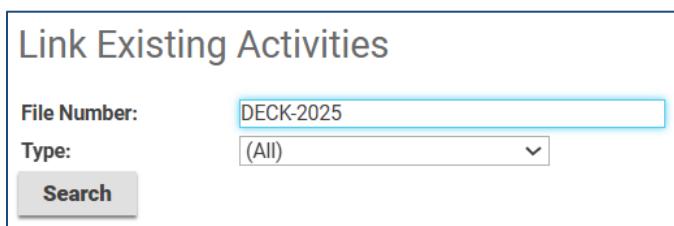
### A. Select 'Link Existing Activities'



The screenshot shows the 'Project' details page for 'EPR-2025-001081 (Active)'. The page has tabs for 'DETAILS', 'LOCATION', and 'CONTACTS'. The 'DETAILS' tab is selected. It contains fields for 'Project Name' (set to 'Example Project Folder'), 'Share With Contractor' (set to '(None)'), 'Project Owner' (set to 'Training Account'), 'Parent Project' (empty), 'Description' (set to 'This is an example project folder used for demonstration purposes.'), and an 'Active?' checkbox which is checked. Below this is a 'LINKED ACTIVITIES' section with a 'Sub Project' button and a 'Link Existing Activities' button, which is highlighted with a red box. At the bottom are 'Save' and 'Cancel' buttons.

### B. Provide search criteria

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



The screenshot shows the 'Link Existing Activities' search page. It has fields for 'File Number' (set to 'DECK-2025') and 'Type' (set to '(All)'). At the bottom is a 'Search' button.

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

Link Existing Activities

File Number:

Type:

(All)

(All)

Building Permit

Business License Amendment

Business License Application

Business License Renewal

Development Approval

Development Permit

General Permit

Planning Approval

Presubmittal

Project

Water Permit

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

Link Existing Activities

DECK-2025-00465: Draft ()  
(Training Account)

ZSUB DECK-2025-00410: In Review (Dwelling - Single Detached - Residential - New)  
16 SHEA ST, LOWER SACKVILLE, NS B4C2A9 (Training Account)

D. The application is now related to the Project.

 Project EPR-2025-001081 (Active)

DETAILS

External Project Details Instructional Text

Note: Submission Pending means your applications has not yet been submitted.  
Once paid, your receipt can be found under My Payments.

\*Project Name:

Share With Contractor:

\*Project Owner:

Parent Project:

Description:

Active?

LINKED ACTIVITIES

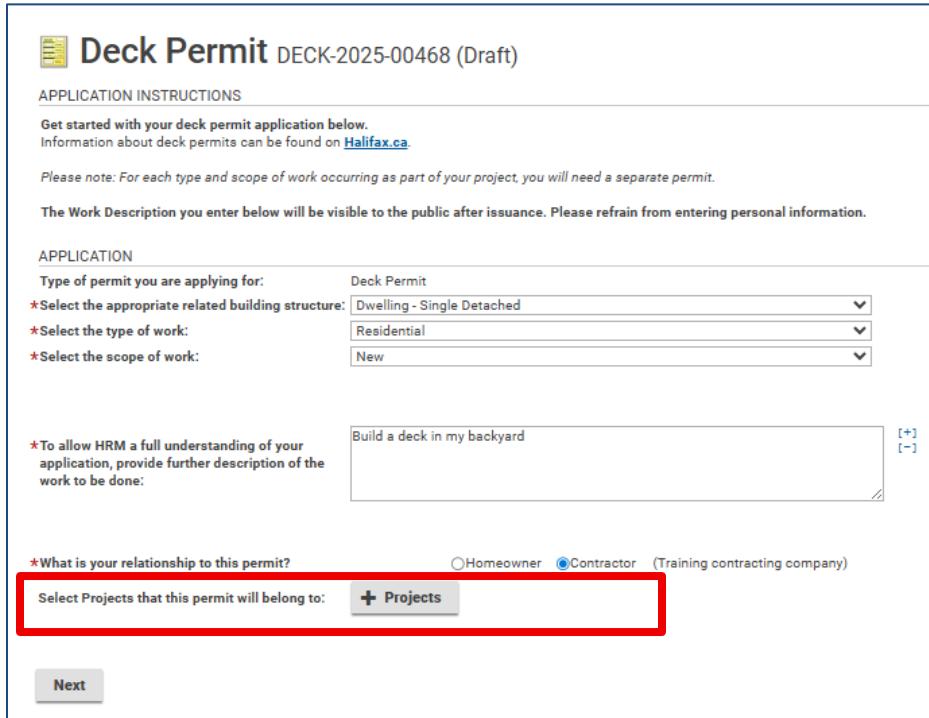
 ZSUB DECK-2025-00410: In Review (Dwelling - Single Detached - Residential - New)  
16 SHEA ST, LOWER SACKVILLE, NS B4C2A9 (Training Account)

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## 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



Deck Permit DECK-2025-00468 (Draft)

APPLICATION INSTRUCTIONS

Get started with your deck permit application below.  
Information about deck permits can be found on [Halifax.ca](#).

Please note: For each type and scope of work occurring as part of your project, you will need a separate permit.

The Work Description you enter below will be visible to the public after issuance. Please refrain from entering personal information.

APPLICATION

Type of permit you are applying for: Deck Permit

\*Select the appropriate related building structure: Dwelling - Single Detached

\*Select the type of work: Residential

\*Select the scope of work: New

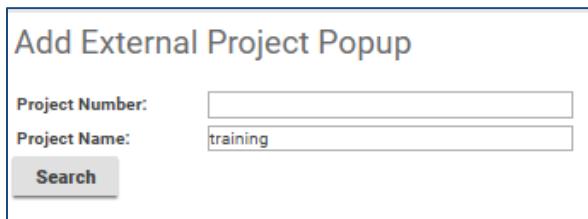
\*To allow HRM a full understanding of your application, provide further description of the work to be done:  
Build a deck in my backyard

\*What is your relationship to this permit?  Homeowner  Contractor  Training contracting company

Select Projects that this permit will belong to: **+ Projects**

Next

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



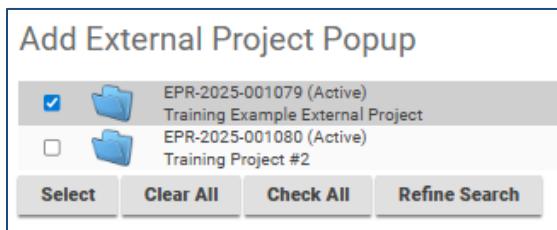
Add External Project Popup

Project Number:

Project Name:

Search

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



Add External Project Popup

<input checked="" type="checkbox"/>		EPR-2025-001079 (Active) Training Example External Project
<input type="checkbox"/>		EPR-2025-001080 (Active) Training Project #2

Select Clear All Check All Refine Search

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



Select Projects that this permit will belong to:

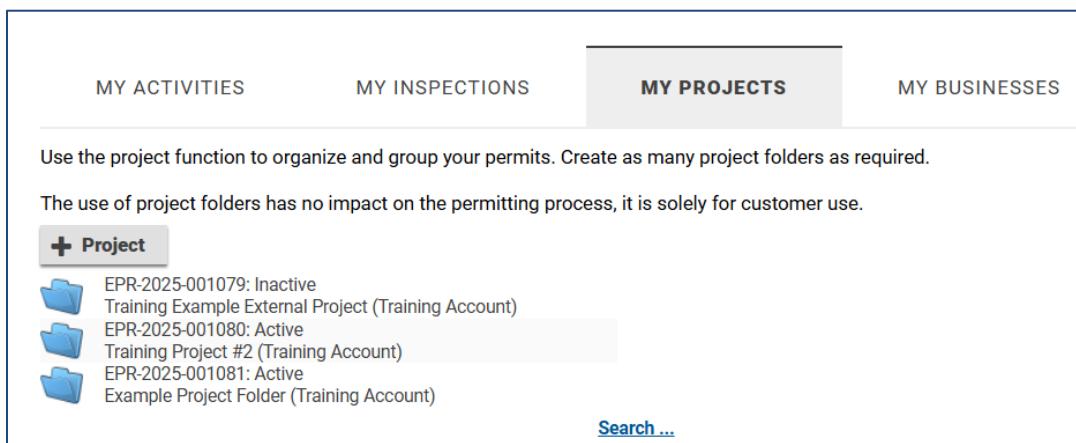
+ Projects

EPR-2025-001079 (Active) Training Example External Project X

## 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.



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

Use the project function to organize and group your permits. Create as many project folders as required.

The use of project folders has no impact on the permitting process, it is solely for customer use.

+ Project

- EPR-2025-001079: Inactive  
Training Example External Project (Training Account)
- EPR-2025-001080: Active  
Training Project #2 (Training Account)
- EPR-2025-001081: Active  
Example Project Folder (Training Account)

Search ...

## 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.



**Deck Permit** DECK-2025-00410 (In Review)

Status:	In Review	Application Date:	Jul 7, 2025
		Issue Date:	
		Completed Date:	
		Date:	
		Expiration Date:	

Description: Deck Permit - Dwelling - Single Detached

DETAILS      REVIEWS      REVIEW SCHEDULE      **PROJECTS**      CONTACTS

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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.

 **Deck Permit** DECK-2025-00410 (In Review)

Status: In Review Application Date: Jul 7, 2025  
Issue Date:  
Completed Date:  
Expiration Date:

Description: Deck Permit - Dwelling - Single Detached

DETAILS REVIEWS REVIEW SCHEDULE PROJECTS CONTACTS

Project #	Project Name	Contractor	Project Owner	Active
 EPR-2025-001080	Training Project #2		Training Account	<input checked="" type="checkbox"/>
 EPR-2025-001081	Example Project Folder		Training Account	<input checked="" type="checkbox"/>

**Save**

## 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

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

Use the project function to organize and group your permits. Create as many project folders as required.

The use of project folders has no impact on the permitting process, it is solely for customer use.

**+ Project**

-  EPR-2025-001079: Inactive  
Training Example External Project (Training Account)
-  EPR-2025-001080: Active  
Training Project #2 (Training Account)
-  EPR-2025-001081: Active  
Example Project Folder (Training Account)

**Search ...**

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B. There are five search criteria to help filter / refine the search.

Enter all or part of the most relevant criteria.

<b>External Project Search</b>	<b>External Project Search</b>
Project Number: <input type="text"/>	Project Number: <input type="text"/>
Project Name: <input type="text"/>	Project Name: <input type="text"/>
Contractor: <input type="text"/>	Contractor: <input type="text"/>
Project Owner: <input type="text"/>	Project Owner: <input type="text"/>
Show Inactive: <input type="checkbox"/>	Show Inactive: <input type="checkbox"/>
<b>Search</b>	<b>Search</b>

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

<b>External Project Search</b>	<b>“Show Inactive” selected</b>
<p>Project</p> <p> EPR-2025-001080: Active Training Project #2 (Training Account)</p> <p><b>Search Again</b></p>	<p>Project</p> <p> EPR-2025-001079: Inactive Training Example External Project (Training Account)  EPR-2025-001080: Active Training Project #2 (Training Account)</p> <p><b>Search Again</b></p>

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## 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.

Project EPR-2025-001081 (Active)

DETAILS LOCATION CONTACTS

External Project Details Instructional Text

**Note: Submission Pending** means your applications has not yet been submitted.  
Once paid, your receipt can be found under My Payments.

**\*Project Name:** Example Project Folder

**Share With Contractor:** Training contracting company

**\*Project Owner:** Training Account

**Parent Project:**

**Description:** This is an example project folder used for demonstration purposes.

**Active?**

**LINKED ACTIVITIES**

**+ Sub Project** **Q Link Existing Activities**

ZSUB DECK-2025-00410: In Review (Dwelling - Single Detached - Residential - New)  
16 SHEA ST, LOWER SACKVILLE, NS B4C2A9 (Training Account)

**Save**

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

**\*Project Owner:** Training Account

(None)

Jennifer Helm

Training Account

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.