



SUMMIT COUNTY BUILDING STANDARDS PERMIT PORTAL USER GUIDE



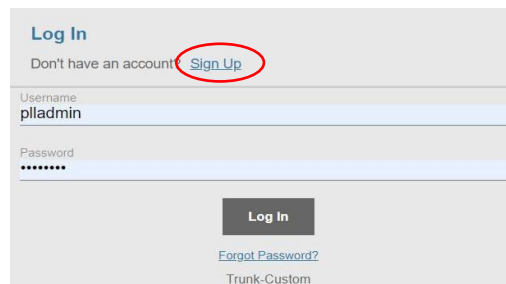
COUNTY OF SUMMIT

Log into the Permit Portal

<https://cityworks.summitoh.net/PublicAccess/template/login.aspx>

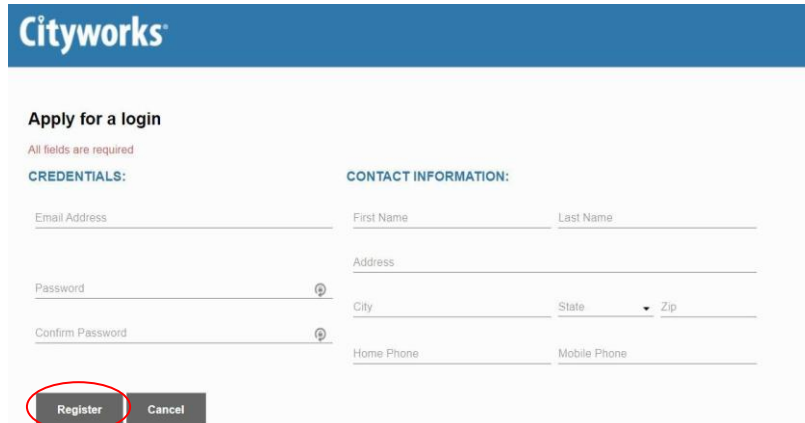
From the Permit Portal login page new users will be required to apply for a login ID before they may use the site.

1. To log in to Public Access, enter your username and password and click **Log In**.
2. If you do not have an account, click **Sign Up** to create one.



The screenshot shows a login form titled "Log In". At the top, it says "Don't have an account?" followed by a red circle around the "Sign Up" link. Below this are two input fields: "Username" with the text "pladmin" and "Password" with masked characters "*****". A "Log In" button is centered below the fields. At the bottom, there is a link for "Forgot Password?" and the text "Trunk-Custom".

3. Choose a Login ID and password, enter your contact information. Then, click **Register**.



The screenshot shows the "Apply for a login" page under the "Cityworks" header. It includes a note "All fields are required". The form is divided into two sections: "CREDENTIALS:" and "CONTACT INFORMATION:". The "CREDENTIALS:" section has fields for "Email Address", "Password", and "Confirm Password". The "CONTACT INFORMATION:" section has fields for "First Name", "Last Name", "Address", "City", "State", "Zip", "Home Phone", and "Mobile Phone". At the bottom, there are two buttons: "Register" (circled in red) and "Cancel".

4. You will receive a confirmation email shortly. Click the link in the email to activate your account. You may now log in and begin using the Permit Portal.

Navigate Public Access

The Permit Portal home page is the first screen you will see after logging in. Shown below is the default setup for the home page.

Cityworks Create Application PLL (AD) Admin

Submitted Incomplete

Submitted

< 1 to 5 of 30 items. > search Sort

Residential - New Single Family RBP19-025	No Location Specified No Application Name	In Review Actions...	Created 07/31/2019
ROW Permit - Excavation ROW19-011	No Location Specified No Application Name	In Review Actions...	Created 06/18/2019
CE Case - Vehicle CE19-0010	No Location Specified No Application Name	Completed Actions...	Created 03/12/2019
Residential - New Single Family RBP19-007	No Location Specified No Application Name	Issued Actions...	Created 02/27/2019
CE Case - High Grass/Weeds CE19-0006	2509 DEBORAH High Weeds 2509 Deborah	Open Actions...	Created 02/14/2019

Page Size 5

Edmond

City of Oklahoma City, Esri, HERE, Garmin, INCREMENT P, NGA, USGS Powered by Esri

The home page displays a list of applications you have opened and submitted.

From the home page, you may view both submitted and incomplete applications, and begin a new application.

If you have any new notices or announcements on the message board, the bell icon next to the user menu will turn red.

Cityworks Create Application PLL (CW) ADMIN

1. Click the **bell icon** to view the message board.

Message Board

Closed New Year's more...

2. Click **more** to read more about the announcement.

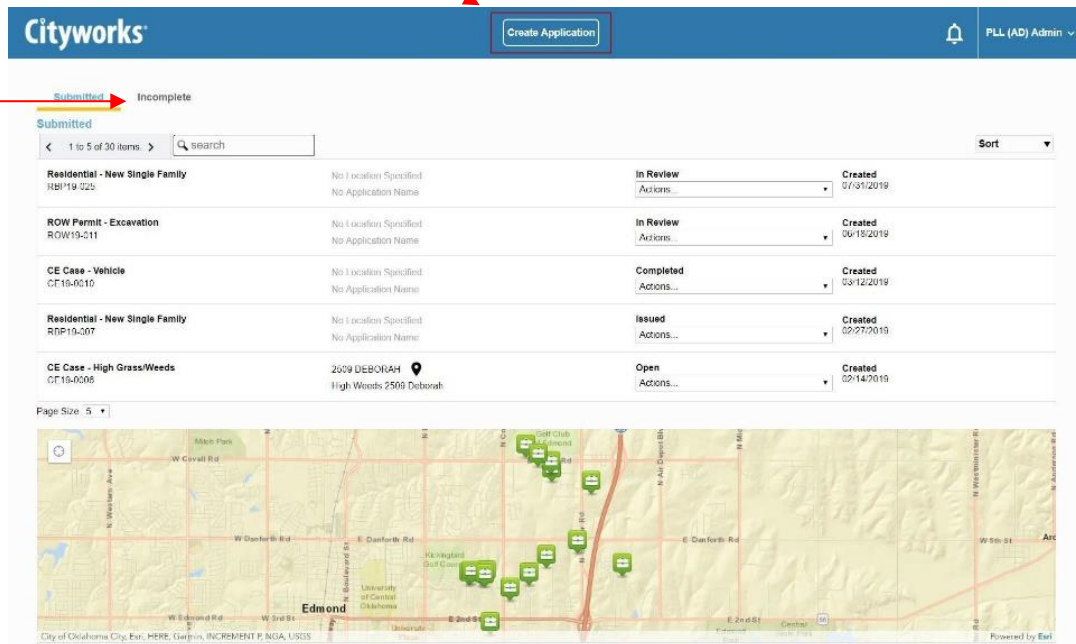
After any new messages have been viewed, the bell icon will turn white again

Begin a New Application

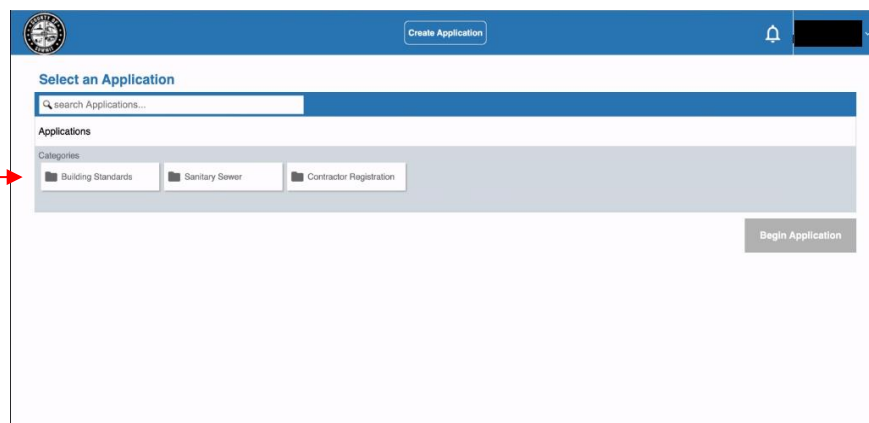
This tool will walk you through the process of creating and submitting a permit or license application. Each application consists of several panels, but the exact panels and the order in which they appear may vary depending on the kind of permit or license you are applying for.

If you need to leave an application before it is submitted, you can return to it at any time by viewing your incomplete applications.

1. To begin, click **Create Application** on the home screen.



This is the first page that will appear when you begin a new application. You can now choose the kind of permit/license you want to apply for. After selecting the first option you will need to keep making selections based upon what your are applying for.



2. When you find the application you want, select it and click **Begin Application**.

3. Enter a **Description** for the application.

The screenshot shows the 'Cityworks' interface for a 'Res. Permit - New Single Family' application, Step 1 of 5. The main form area has a 'Description' field and an 'Address' field. To the right is a map showing a residential street grid with labels like 'N. Rainier St. Ave.', 'Robert Rd.', 'Cathlamet Rd.', 'Gresham Rd.', 'Fredricka Dr.', 'Lola Lynn', and 'Joseph Dr.'. Below the map are 'Cancel', 'Clear', and 'Next' buttons. A sidebar on the left lists steps: 1 Main, 2 People, 3 Contractor, 4 Rel Docs, and 5 Payment. A red arrow points from the text above to the 'Description' field, and another red arrow points from the text below to the 'Next' button.

4. Enter the address or location of the project. Once you have entered the address, the map will display the geographical location for your permit.

5. Click **Next** to continue.

The **People** panel requires you to enter the name and contact information of people involved with the permit or license.


The screenshot shows the 'Cityworks' interface for a 'Residential - New Single Family' application, Step 2 of 6. The form is titled 'People' and contains three columns for 'Applicant', 'Contractor', and 'Property Owner'. Each column has fields for Name, Address Line 1, City Name, State, Zip Code, Phone (Home), Phone (Mobile), Email, and Comment. There are 'Use My Information' buttons above each column. At the bottom right are 'Cancel', 'Clear', 'Previous', and 'Next' buttons. A sidebar on the left lists steps: 1 Main, 2 People, 3 DateGroup, 4 Contractor, 5 Rel Docs, and 6 Payment. A red arrow points from the text below to the 'Phone (Home)' field in the Applicant column.

NOTE: Items in red are required fields. You cannot proceed to the next section until all required fields are filled.

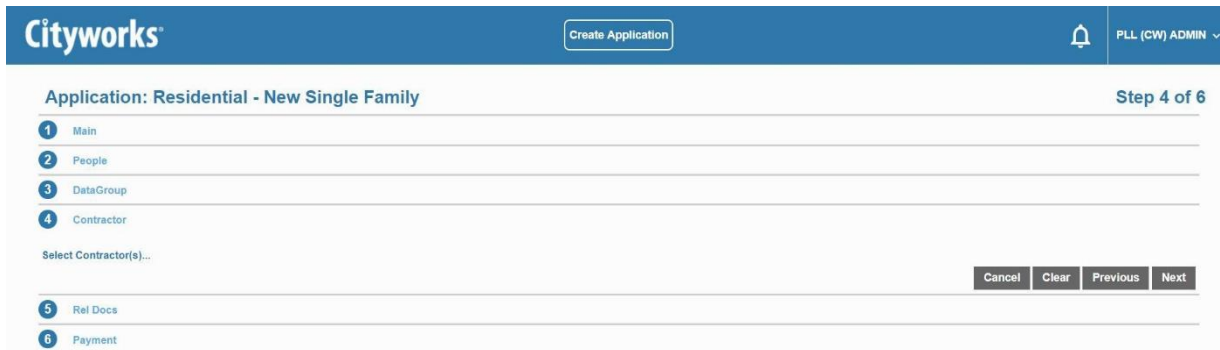
If an invalid email address or phone number is entered, the system will highlight which field

contains the invalid entry so that it can be corrected before proceeding.

6. Fill in the information for each person and click **Next**.

 **TIP:** Click **Use My Info** to automatically enter the information from your user account into the corresponding fields on this form.

The Contractor panel allows you to select a contractor for your application.




The screenshot shows the Cityworks application interface. At the top, there is a blue header with the Cityworks logo, a 'Create Application' button, a notification bell, and a user profile 'PLL (CW) ADMIN'. Below the header, the application title is 'Application: Residential - New Single Family' and the progress indicator shows 'Step 4 of 6'. A vertical list of steps is on the left: 1 Main, 2 People, 3 DataGroup, 4 Contractor (highlighted), 5 Rel Docs, and 6 Payment. The main content area has a label 'Select Contractor(s)...' and a 'Cancel' button. At the bottom right, there are buttons for 'Cancel', 'Clear', 'Previous', and 'Next'.

7. Click **Select Contractor(s)** to open a selection window.



The screenshot shows a 'Contractor Search' window with a search bar and a table of contractors. The table has columns for Business Name, Type, License, and Expiration. There are five rows of contractors, each with a checkbox in the first column. At the bottom right, there are 'Cancel' and 'Submit' buttons.

	Business Name	Type	License	Expiration
<input type="checkbox"/>	Archway Electric	ELECTRICAL	18-456796	06/30/2019
<input type="checkbox"/>	Aspen Electric, LLC	ELECTRICAL	18-456789	06/30/2019
<input type="checkbox"/>	Corner Canyon Roofing	ROOFING	18-456786	06/30/2019
<input type="checkbox"/>	DBR Plumbing	MASTPLUMB	18-456794	06/30/2019
<input type="checkbox"/>	Granite Park Plumbing	MASTPLUMB	18-456782	06/30/2019

 **NOTE:** This list shows contractors with multiple registrations. If a contractor has both a local registration and state license, it will be shown in the list twice.

8. Select the check box next to the name of the contractor you wish to add to the application. You may use the search tool to narrow down the list of contractors.
9. Click **Submit** to add the contractor and close the selection window.
10. Click **Next**.

The **Data Group** panel requests specific information about your project. The information collected here may be used to calculate fees. Required fields are marked in red.



NOTE: The **Data Group** panel is based on the kind of permit or license you are applying for and will request different information depending on which application you chose on the **Create an Application** page.

Cityworks Create Application PLL (CW) ADMIN

Application: Residential - New Single Family Step 3 of 6

- 1 Main
- 2 People
- 3 DataGroup

BP - General Data

Enter New Construction SQFT:

Quantity

Estimated Cost of Construction:

Number

Estimated Start Date of Construction:

Job Description

Comment

BP - Single Family Data

Garage:

Select a value

Number of Bathrooms:

Select a value

Number of Kitchens:

Select a value

Number of Bedrooms:

Select a value

Number of Fireplaces:

Select a value

Additional Comments

Comment

BP - Setbacks (feet)

Front (ft):

Number

Back (ft):

Number

Right Side (ft):

Number

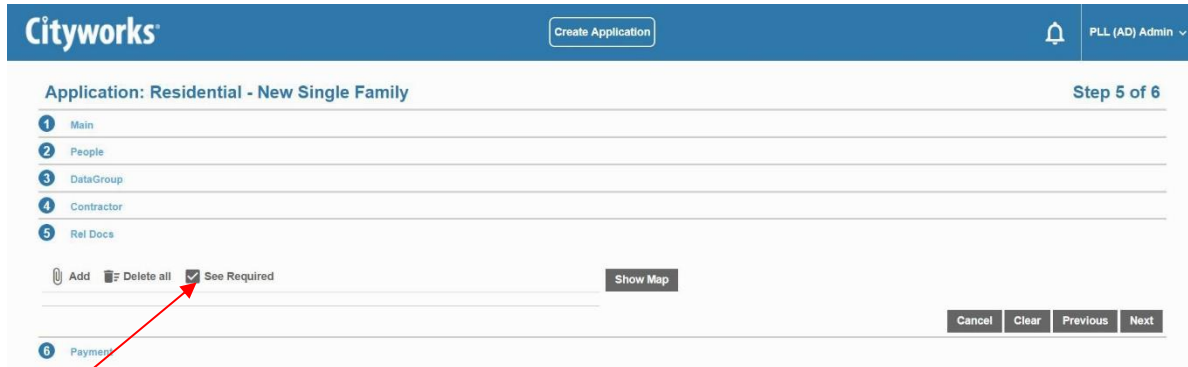
Left Side (ft):

Number


- 4 Contractor
- 5 Rel Docs
- 6 Payment

11. Enter your application information.
12. Click **Next** to continue.

The **RelDocs** panel allows you to attach any relevant documents and files to your application.



The screenshot shows the Cityworks application interface. At the top, there is a blue header with the Cityworks logo, a 'Create Application' button, a notification bell, and a user profile 'PLL (AD) Admin'. Below the header, the application title is 'Application: Residential - New Single Family' and it is 'Step 5 of 6'. A progress bar shows six steps: 1 Main, 2 People, 3 DataGroup, 4 Contractor, 5 Rel Docs, and 6 Payment. In the 'Rel Docs' step, there are three buttons: 'Add', 'Delete all', and 'See Required'. The 'See Required' button is checked and highlighted with a red arrow. There is also a 'Show Map' button and a 'Cancel' button. At the bottom right, there are buttons for 'Clear', 'Previous', and 'Next'.

 **TIP:** Click **See Required** to view a list of documents that are required or recommended for this permit type.

13. To add a file, click Add to open a selection window. Click the Delete icon to the right of a file to remove it or click Remove all attachments to delete all files simultaneously.
14. Click Submit to continue. You will receive an email verification that your application has been received.

Fees

Once your application has been processed, you will receive an email notification to pay the necessary fees. After the fees are paid, you will receive an email with your instructions on how to proceed.

Review Submitted Applications

To see those applications that you have completed and submitted, select the Submitted tab on the *Public Access* home page.



The panel below will now list all your submitted applications.

Submitted Applications			
1 to 5 of 25 items >		search	Sort ▼
Residential - New Single Family RBP18-057	378 CROWN COLONY -No Application Name-	In Review Actions...	Created 07/6/2018
Residential - New Single Family RBP18-056	1744 GEETA -No Application Name-	In Review Actions...	Created 07/5/2018
Commercial - New Construction CBP18-050	730 NORTH CREEK -No Application Name-	In Review Actions...	Created 07/5/2018
License - Pet Registration 19-049	508 NORTH CREEK DR -No Application Name-	Active Actions...	Created 06/28/2018
Commercial - Addition CBP18-048	1704 GEETA RD -No Application Name-	In Review Actions...	Created 06/28/2018

Each application is listed with its basic information (such as its name, address, status, submittal date, creation date, and expiration date).

Residential - New Single Family RBP18-057	378 CROWN COLONY -No Application Name-	In Review Actions...	Created:07/6/2018 Expires:07/31/2019
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1. Click the case code to go to your application's summary page.
2. Click the **Actions** drop-down list to select an option. Several of these options, such as **Schedule Inspection** and **Pay Fees** are essential to moving your case toward completion.



Check the Status and Progress of Your Application

Once you submit an application, you can check on its progress any time.

1. Make sure the home page is displaying *submitted applications*.



2. Scroll through the list of submitted applications or enter the application number in the search box at the top of the page.

Submitted Applications

< 1 to 5 of 25 items. > Sort ▾

Residential - New Single Family RBP18-057	378 CROWN COLONY -No Application Name-	In Review Actions...	Created 07/6/2018
Residential - New Single Family RBP18-056	1744 GEETA -No Application Name-	In Review Actions...	Created 07/5/2018
Commercial - New Construction CBP18-050	730 NORTH CREEK -No Application Name-	In Review Actions...	Created 07/5/2018
License - Pet Registration 18-049	508 NORTHCREEK DR -No Application Name-	Active Actions...	Created 06/28/2018
Commercial - Addition CBP18-048	1704 GEETA RD -No Application Name-	In Review Actions...	Created 06/28/2018

- The current status of the case appears above the **Actions** drop-down list. This status will change as your case progresses, so check back from time to time.

Submitted Applications

< 1 to 5 of 25 items. > Sort ▾

Residential - New Single Family RBP18-057	378 CROWN COLONY -No Application Name-	In Review Actions...	Created 07/6/2018
Residential - New Single Family RBP18-056	1744 GEETA -No Application Name-	In Review Actions...	Created 07/5/2018
Commercial - New Construction CBP18-050	730 NORTH CREEK -No Application Name-	In Review Actions...	Created 07/5/2018
License - Pet Registration 18-049	508 NORTHCREEK DR -No Application Name-	Active Actions...	Created 06/28/2018
Commercial - Addition CBP18-048	1704 GEETA RD -No Application Name-	In Review Actions...	Created 06/28/2018

- To see more case details, click the **Actions** drop-down list and select **Check Case Status**.



This will take you to the summary page for your case. Here you will find all the information you need regarding your case, including the address, people and contractors associated with the case, case data, and related documents.

Add, View, or Remove Attachments

You can add, view, or remove attachments from your permit.

 **NOTE:** You can only remove attachments if you were the user who added them.

- Make sure the home page is displaying submitted applications.



2. Open the application that you want to view or modify the attachments for.
3. Click **Add attachments** to add an attachment. Browse to the attachment, select it, and click **Open** to attach it.



The *Attached By* field shows the name of the user who attached the file.

4. To view an attachment, click it to download the file and view it.

If you were the user who added the attachment, there will be a **Delete** icon to the right of the attachment.






5. Click the **Delete** icon to the right of a file to remove it.

Finish an Incomplete Application

If you have applications that have not been completely filled out and submitted, you may find them by selecting the **Incomplete** tab on the home page.



The panel below will now list all of your incomplete applications. You may also open an incomplete application by clicking on it in the map. Incomplete applications are represented by a gray icon on the map.

Incomplete Applications			
< 1 to 5 of 34 Items. >		<input type="text" value="search"/>	Sort ▼
Res. Permit - New Single Family 390	1829 GODHANIA RD  -No Application Name-	OPEN <input type="text" value="Actions..."/>	Created 06/01/2017
E-ROW Utility - New Construction 388	-No Location Specified- -No Application Name-	OPEN <input type="text" value="Actions..."/>	Created 08/26/2016
Res. Permit - New Single Family 387	-No Location Specified- -No Application Name-	OPEN <input type="text" value="Actions..."/>	Created 07/14/2016
Res. Permit - Fence 379	100 E Main St, Edmond, Oklahoma, 73034  New Fence	OPEN <input type="text" value="Actions..."/>	Created 04/03/2015
Engineer - Right of Way Permit 365	1521 W Danforth Rd, Edmond, Oklahoma, 73003  1521 W Danforth	OPEN <input type="text" value="Actions..."/>	Created 06/26/2014

1. Click the **Actions** drop-down list to either **Continue Application** or **Delete Application**.



If you selected **Continue Application**, the application input screen will open. See "**Begin a New Application**" on page 5 for more information.