

Adding contacts to your portal account

Instructions for Applicant

Start under the “My Projects, Permits and Licenses” tab. Search for the project you would like to add the Contact on, open the project by clicking the plus sign and then the magnifying glass (or just the magnifying glass if you don’t have a plus sign).

The screenshot shows the 'My Dashboard' page of the City of Edmond portal. The dashboard includes three summary cards: 'My Projects, Permits and Licenses' with a count of 38, 'Applications with Fees Due' with a count of 29, and 'Available Inspection Requests' with a count of 4. Below these cards is a section titled 'MY PROJECTS, PERMITS AND LICENSES' which contains a table of project and license data. A search bar and a 'Show 10 entries' dropdown are located above the table. The table has columns for Permit Number, Project Name, Type, Sub-Type, Status, and Location. The first row shows permit EL22-00692 for an Electrical project at 644 HARBOR TOWN DR. Other rows include residential and commercial building permits. At the bottom of the table, there is a 'Date Created 9/1/2022' and an 'Actions' column with a magnifying glass icon.

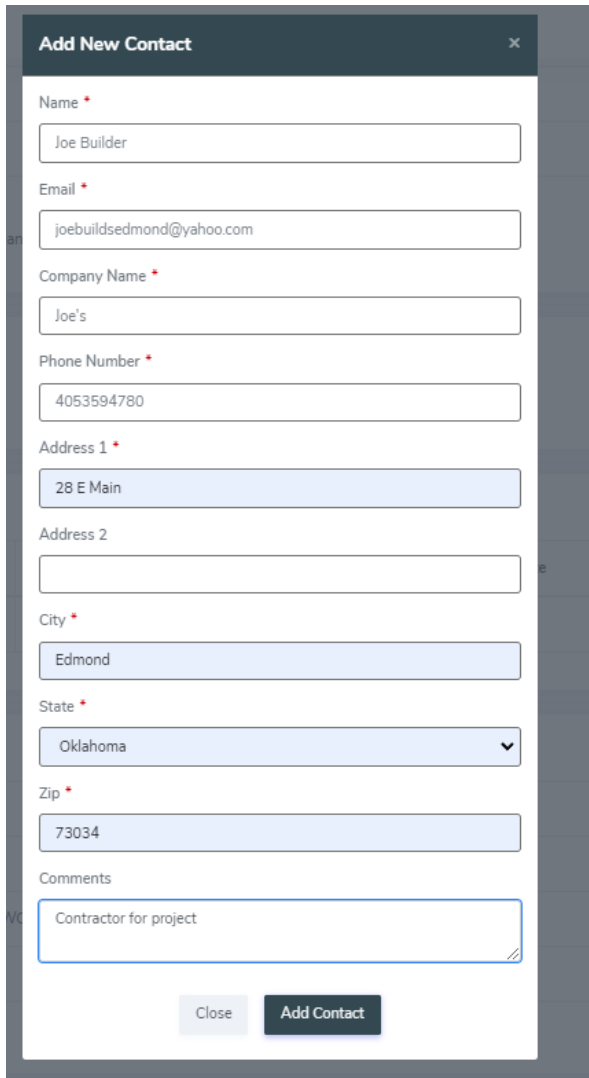
| Permit Number | Project Name | Type | Sub-Type | Status | Location |
|---------------|--|----------------------|-----------------------------------|--------|-----------------------|
| EL22-00692 | | Electrical | Electrical - Res. New - Attached | Issued | 644 HARBOR TOWN DR |
| B22-00620 | TEST FOR FZ | Residential Building | Residential New Construction | Issued | 2100 TIMBERDALE DR |
| PL22-00747 | | Plumbing | Plumbing Permit - Residential New | Issued | 140 E 5TH ST UNIT 108 |
| PL22-00746 | | Plumbing | Plumbing - Water Heater Changeout | Issued | 28 E MAIN ST |
| B22-00610 | Test 3 - JT Comment Letters - Character Limit Test | Commercial Building | Commercial New Construction | Issued | 28 E MAIN ST |

On the Permit/License Info page, scroll down to the People section. Click “Add New Contact”

The screenshot shows the 'People' section of the Permit/License Info page. It features a table with two columns: 'Name' and 'Role'. The table lists three contacts: Kirsten Ledington (Applicant), CITY OF EDMOND EDMOND PUBLIC WORKS AUTHORITY (Property Owner), and COE-DCC (Occupant). Below the table is a dark button labeled 'Add New Contact'.

| Name | Role |
|--|----------------|
| Kirsten Ledington | Applicant |
| CITY OF EDMOND EDMOND PUBLIC WORKS AUTHORITY | Property Owner |
| COE-DCC | Occupant |

Fill out the required sections on the Add New Contact screen and click “Add Contact.” This will allow the person to access this specific project or permit. Make sure the email address matches their account email address.

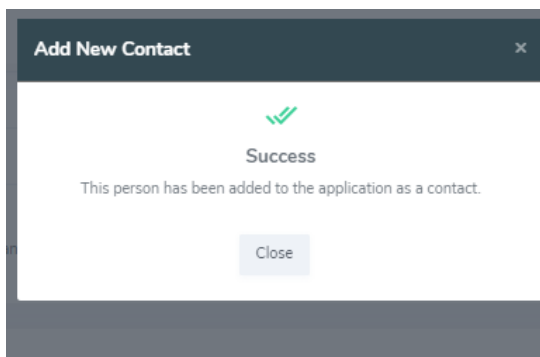


The screenshot shows a modal window titled "Add New Contact" with a close button (X) in the top right corner. The form contains the following fields:

- Name ***: Text input containing "Joe Builder".
- Email ***: Text input containing "joebuildsedmond@yahoo.com".
- Company Name ***: Text input containing "Joe's".
- Phone Number ***: Text input containing "4053594780".
- Address 1 ***: Text input containing "28 E Main".
- Address 2**: Empty text input.
- City ***: Text input containing "Edmond".
- State ***: Dropdown menu showing "Oklahoma".
- Zip ***: Text input containing "73034".
- Comments**: Text area containing "Contractor for project".

At the bottom of the form are two buttons: "Close" and "Add Contact".

You will receive a success message. Your contact has successfully been added.



Instructions for added Contact

Login/create your portal account. Make sure you are using the same email address that they added.

The screenshot shows the 'City of Edmond, OK Online Permit Portal' sign-in page. At the top is the City of Edmond logo with the tagline 'A GREAT PLACE TO GROW'. Below the logo is the text 'City of Edmond, OK Online Permit Portal'. The main heading is 'Sign In', followed by the instruction 'Enter your email address and password to access the portal.' There are two input fields: 'Enter email' with the value 'joebuildsedmond@yahoo.com' and 'Enter password' with masked characters. A 'Forgot password?' link is next to the password field. A 'Sign In' button is centered below the fields. At the bottom, there is a link: 'Don't have an account? [Create account](#)'.

Search the permit in the My Projects, Permits and Licenses tab.

MY PROJECTS, PERMITS AND LICENSES

The table below contains a list of all of your permits and licenses. To view more details about a permit or license, click the icon. To renew a business license, click the icon in the **Actions** column.

Show entries Search:

| Permit Number | Project Name | Type | Sub-Type | Status | Location | Date Created |
|---------------|--|---------------------|--|---------|--------------|--------------|
| PL22-00746 | | Plumbing | Plumbing - Water Heater Changeout | Issued | 28 E MAIN ST | 9/6/2022 |
| B22-00610 | Test 3 - JT Comment Letters - Character Limit Test | Commercial Building | Commercial New Construction | Issued | 28 E MAIN ST | 9/1/2022 |
| ME22-00527 | | Mechanical | Mechanical Res. Heat and Air Changeout | Issued | 28 E MAIN ST | 8/22/2022 |
| PL22-00741 | | Plumbing | Plumbing - Water Heater Changeout | Issued | 28 E MAIN ST | 8/22/2022 |
| PL22-00730 | | Plumbing | Plumbing Permit - Residential Other | Issued | 28 E MAIN ST | 6/29/2022 |
| B22-00544 | Test another new construction | Commercial Building | Commercial New Construction | Issued | 28 E MAIN ST | 5/27/2022 |
| EL22-00654 | test | Electrical | Electrical - Res. Other - Standalone | Review | 28 E MAIN ST | 5/25/2022 |
| B22-00540 | test com add | Commercial Building | Commercial Addition | Review | 28 E MAIN ST | 5/25/2022 |
| B22-00542 | test demo | Demolition | Demolition Permit - Exterior | Pending | 28 E MAIN ST | 5/26/2022 |

Open the permit, got to the Onbase Plan Review Project tab and click “Upload/View ePlans”

OnBase Plan Review Project

| Identifier | Name | Status |
|------------|--|----------------|
| B22-00610 | Test 3 - JT Comment Letters - Character Limit Test | Plans Approved |

Upload/View ePlans

for review comments and to submit plans and documents

Go to the “project Invitations” tab

Project Information | Plan Documents | Review Documents | Approved Documents | Related Projects | **Project Invitations**

Project | Manage Invitations | [Invite User](#)

Click on the check box to accept the invitation

Project Invitation accepted.

View Within Last 6 Months

No projects are available in this date range.

Once you have accepted the invitation, close that window and reopen the “Upload/View ePlans” tab.

OnBase Plan Review Project

| Identifier | Name | Status |
|------------|--|----------------|
| B22-00610 | Test 3 - JT Comment Letters - Character Limit Test | Plans Approved |

Upload/View ePlans

for review comments and to submit plans and documents

You can now upload or view ePlans associated with this project.



Plan Review

[Sign Out](#)

[Projects](#) [Settings](#) [Profile](#)

[Project Information](#) [Plan Documents](#) [Review Documents](#) [Approved Documents](#) [Related Projects](#) [Project Invitations](#)

Project
EP22-00013
Name
OCS Soccer Field House
Status
Coordinator Review

Review Status
None

Quick start instructions:
* Use the **Browse** button to select one or more files
* Use the **Upload** button to import the files to the system
* After uploading, use the "Submit for Review" button to the left to start the review process
* Uploading Revisions: Use the exact same file name or use the Upload button to the right of the file under 'Actions'

[Browse...](#) [Clear](#) [Upload](#) [Cancel](#) [Edit Names](#) Status: Ready

[Name](#) [Discipline](#) [Sheet Type](#) [Description](#) [Revision](#) [Upload Status](#) [Actions](#)