



Project Collaborators Guide

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Overview

During your online application at SJPermits.org you will be asked, after the properties page, to add any additional Project Collaborators to your proposed project. Project Collaborators are people associated with the application and can be added and assigned an appropriate role, such as: Project Contact, Billing Applicant, ePlan Applicant, etc.

On this page you will see the people who have been identified as project collaborators. When you initiate the permit application there are set permit collaborators that get added to the application automatically and will vary on whether you use the “Apply on Behalf of” feature or not. Typically, the person who starts the application will see themselves as the Applicant and the property owner of the Primary Property will be added as the Owner in the application. If you selected a street segment or intersection as the primary property, then there will be no owner listed in the collaborators page. This guide will focus on standard applications, for more information on the “Applying on Behalf of” feature, refer to the [Apply on Behalf of Guide](#).

On the Project Collaborators page, you can:

1. Add additional collaborators.
2. Proceed to the next step, if no additional collaborators need to be added.
3. Cancel the application.
4. Return to My Services to continue the application later.
5. Go back to the Properties page to add additional properties, if any were missed.
6. Delete collaborators, if collaborators were added by mistake (not shown below, refer to [Section 3](#) for deleting collaborators).

PROJECT COLLABORATORS

Role Type	Name	Organization	Delete
Applicant	JOHN DOE	COMCAST	
Owner		SMITH JOHN	

5

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1

2

To add more collaborators, click on the “Add Collaborator” button to load the next page where you will have the following options:

1. Add a new Collaborator to the application (See [Section 1](#))
2. Add another Role to an existing Collaborator (See [Section 2](#))
3. Go back to the Project Collaborators main screen

1
 Add New Collaborator

2
 Add Additional Role to Existing Collaborator

3

Section 1 – Add New Collaborator

Page Overview

To add a collaborator that does not currently exist in the application select the “Add New Collaborator” radio button, shown earlier, to bring up the Collaborator Search screen. From the search screen you will have the options available to you to search for collaborators:

1. First Name
2. Last Name
3. Email address
4. Organization Name
5. PeopleRSN

SEARCH CRITERIA

You must fill at least one field below before clicking on Search

Partial entries and wildcard (%) searches are permitted, except on the PeopleRSN field.

Example: In the family name, Smith and Smith% will both return data for Smithson

First Name <input style="width: 95%;" type="text"/>	Last Name <input style="width: 95%;" type="text"/>	Email <input style="width: 95%;" type="text"/>
Organization Name <input style="width: 95%;" type="text"/>	PeopleRSN <input style="width: 95%;" type="text"/>	

Performing the Search

All search fields entered will be used to perform the search, so the more fields filled in, the more refined the search results will be. All the search fields, with the exception of PeopleRSN, allow for “wildcards” to be used as part of the search. This allows for more flexibility in the search so exact matches don’t need to be entered. Once you have your search criteria entered click the “Search” button to begin your search.

For partial searches you will utilize “wildcards” by using the percent (%) symbol in front of, behind or in combination of your search criteria. For simplicity, the examples below on how to utilize the wildcard search will focus on the first name field.

- **XXXXXXXX%** - inputting a text string followed by the wildcard symbol in the first name box will allow you to search for that string located anywhere in the first name. For example, if you enter Ke% the search results displayed will be ones that have KE anywhere in the first name, such as Duke, Kevin, or Aniket.
- **%XXXXXXXX** - inputting the wildcard in the beginning followed by a text string in the first name field will allow you to search for that string located anywhere in the first name. For example, if you enter %beth the search results displayed will be ones that have BETH anywhere in the first name, such as Elizabeth, Tabetha, or Lisbeth.
- **%XXXXXXXX%** - inputting a text string between to wildcard symbols in the first name field will allow you to search for that string located anywhere in the first name. For example, if you enter %Ham% the search results displayed will be ones that have HAM anywhere in the first name, such as Hamilton, Abraham, or Mohammad.

Note:

- When searching using a PeopleRSN you should not use any other search fields.
- There are other wildcard combinations you may try. However, the above combinations are the ones recommended to search for collaborators.

Selecting Collaborator and Assigning Roles

Once you have submitted your search criteria you will be taken to the Collaborator search results screen you will be able to:

1. Adjust the number of results shown on the screen.
2. Filter through the results utilizing the “Search” box at the top right of the “Results” box.
3. Scroll through the results.
4. Select the Collaborator(s) you wish to add to your application by clicking the check box next to the name of the person you wish to add.
5. Select a Role for the Collaborator. **Note:** This dropdown will only appear next to selected collaborators. There can also only be one of each role for the application and roles available will vary per application type.
6. Add Collaborators to the application by clicking on the “Add Collaborator(s)” button. This will take you back to the Project Collaborators main screen with the collaborators you selected added to the application. **Note:** This button will only appear if you have selected at least one collaborator.
7. Go back to the Project Collaborators main screen by clicking on the “Previous” button without any additional collaborators.

RESULTS

1 Show 10 entries

2 Search:

4 Select	First Name	Last Name	Organization	Active User	PeopleRSN	Role
<input type="checkbox"/>	eliabeth	nguyen			7597337	
<input type="checkbox"/>			Anthony Thornberry	Yes	722326	
<input type="checkbox"/>	Kristi	Ojigho	Bureau of Fire Prevention	Yes	7597391	
<input type="checkbox"/>	Zachary	Johnson		Yes	7597396	
<input type="checkbox"/>	Cameron	Gee		Yes	7597386	
<input type="checkbox"/>	Sara	Dominguez	CONTRACTORS R US	Yes	7597420	
<input checked="" type="checkbox"/>	Jose	Oropeza		Yes	7597390	5 <input type="text"/>
<input type="checkbox"/>	Alex	Powell		Yes	7597389	
<input type="checkbox"/>	Elizabeth	Nguyen	CONTRACTORS R US	Yes	7597415	
<input type="checkbox"/>	Isabel	De La Rosa	CONTRACTORS R US	Yes	7597414	

Showing page 1 of 10

3 Previous 1 2 3 4 5 ... 10 Next

Your search produced too many results. Add additional information to narrow the results.

Previous 7

6 Add collaborator(s)

Depending on what criteria is used to perform the search, if the results exceed 100 results, you will get a message at the bottom of the page, as shown below. If the collaborator is not shown in the results, the search criteria should be refined. This can be done by making the previously used search criteria more specific (i.e., Keith vs. %Kei%) or by adding additional search criteria (i.e., adding last name, organization, etc.) to help refine the search.

Your search produced too many results. Add additional information to narrow the results.

Section 2 – Add Additional Roles to an Existing Collaborator

If you wish to add additional project roles for an existing collaborator select the “Add Additional Role to Existing Collaborator” radio button, shown earlier, to bring up the “Current Collaborators” screen. From this screen you will be able to do the following:

1. Select the name of the existing collaborator you wish to add another role to from the “Name” dropdown.
2. Select the additional role you wish to assign the existing collaborator using the “Role” drop down.
Note: There can only be one of each role for the application and roles available will vary per application type.
3. Add more collaborator roles by clicking on the plus (+) symbol located at the top right of the Current Collaborators screen
4. Delete any rows if, you added a row by mistake or wish to remove a selection, by clicking on the trash can symbol next to the row you wish to remove.
5. Add the Collaborator(s) by clicking the “Add Collaborator(s)” button. This will take you back to the Project Collaborators main screen with the existing collaborators you selected added to the application with the roles you assigned. **Note:** This button will only appear if you have selected at least one existing collaborator.
6. Go back to the Project Collaborators main screen by clicking on the “Previous” button without any additional roles to the existing collaborators.

○ Add New Collaborator ● Add Additional Role to Existing Collaborator

CURRENT COLLABORATORS

1 Name	2 Role	3 +
JOHN SMITH	Civil Engineer	+
		4

6 Previous 5 Add collaborator(s)

Section 3 – Delete Collaborators

If you have added any new collaborators and/or assigned additional roles to existing collaborators you will have the option to delete collaborators from the Project Collaborators main screen. To delete the collaborator from the application, click on the “Delete” button from the Project Collaborators main screen.

Note:

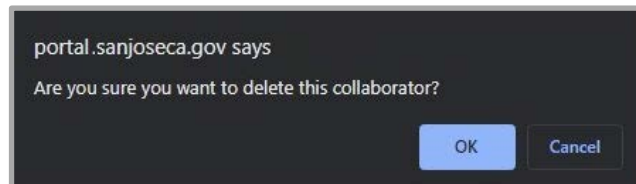
- Applicant and Owner roles cannot be deleted. If this needs to be modified contact the staff member who is assigned to your project for assistance.
- Users going through the application process, that are only listed once in the Project Collaborators screen, will not be able to delete themselves from their last role on the screen. This is because if you are not listed as a collaborator, you should not be able to modify an application.

The screenshot shows the 'PROJECT COLLABORATORS' interface. It features a table with the following data:

Role Type	Name	Organization	Delete
Applicant	JOHN DOE	COMCAST	
Civil Engineer	JOHN DOE	COMCAST	Delete
Developer		SMITH JOHN	Delete
Owner		SMITH JOHN	
ePlan Applicant	JOHN DOE	COMCAST	Delete

Below the table are navigation buttons: Previous ◀, Return to My Services ↻, Cancel Application, Add Collaborator, and Next.

Once you click on the delete button a pop-up will display asking you to confirm the deletion. Click on “OK” to proceed or “Cancel” to go back to the screen without deleting the collaborator.



After the page reloads the deleted collaborator will no longer show in the list. You may repeat this process as many times as needed.

The screenshot shows the 'PROJECT COLLABORATORS' interface after the deletion. The table now contains:

Role Type	Name	Organization	Delete
Applicant	JOHN DOE	COMCAST	
Civil Engineer	JOHN DOE	COMCAST	Delete
Developer		SMITH JOHN	Delete
Owner		SMITH JOHN	

The navigation buttons at the bottom remain the same: Previous ◀, Return to My Services ↻, Cancel Application, Add Collaborator, and Next.