SJPERMITS.ORG

Member Management

This guide will cover the following topics:

Overview

At SJPermits.org you have the ability to add members that can apply on behalf of an organization or individual. This guide will focus on how to add members to your account. To learn more about the "Applying on Behalf of" feature refer to the Apply on Behalf of User Guide. The different membership types are:

- Business Owner
- Property Owner
- Partner
- Employee
- Contract Employee
- Authorized Applicant

There are no limits to number of members you can add to your account. However, a user added as a member can only be listed with one membership type.

Note:

- If there are permit restrictions in place for a permit application the person who will be applying must still meet the criteria (i.e. must be a contractor with a valid contractor license).
- Adding a member will not allow them to see the permits you have applied for. They will not gain any form of access to your account other than being able to apply for a permit on your behalf.

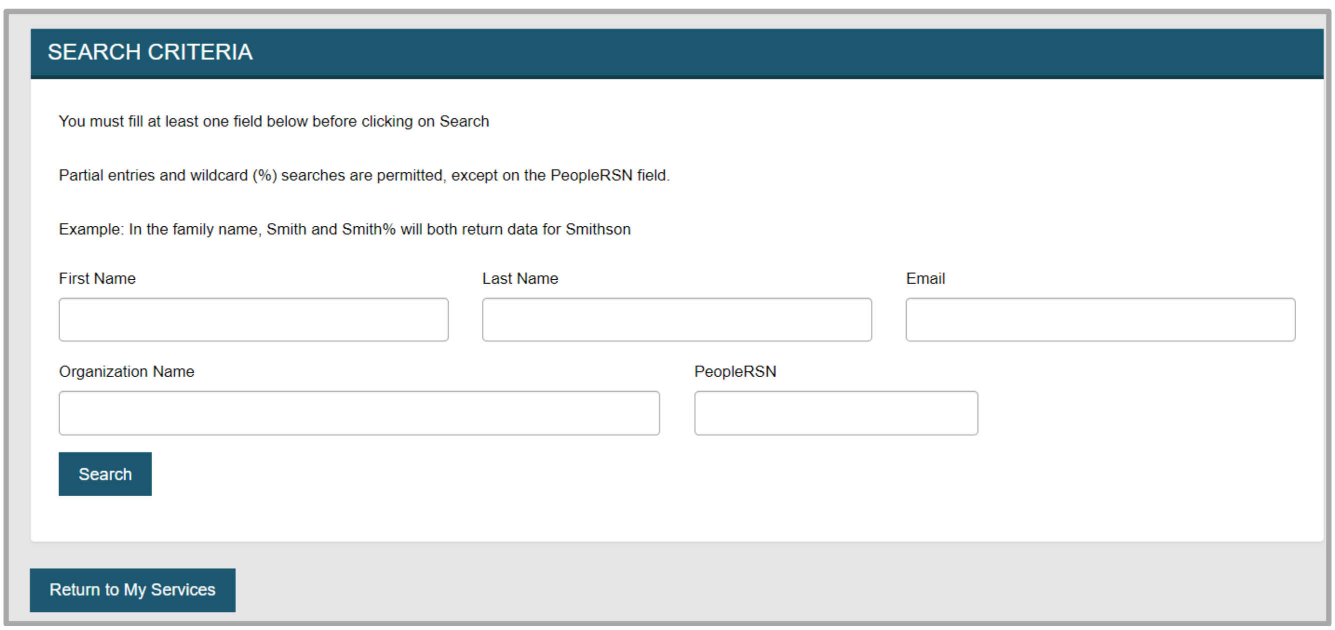
SECTION 1 - ADDING A MEMBER

After you log into your account you will be taken to the My Services page. From this page, you will need to navigate down the page to the Member Management section. From this page click on the on “Add” button, as shown below.

To add a member, that does not currently exist as a member in your account, click on the “Add” button to bring up the Member Search screen. From the search screen you will have the following options available to search for collaborators:

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

Step 1 - 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. You may also click on the “Return to My Services” button to return to cancel the search and return to the My Services page.

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 Du**ke**, **Ke**vin, or Ani**ke**t.
- **%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 Eliza**beth**, Ta**beth**a, or Lis**beth**.
- **%XXXXXXX%** - 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 **Ham**ilton, Abra**ham**, or Mo**ham**mad.

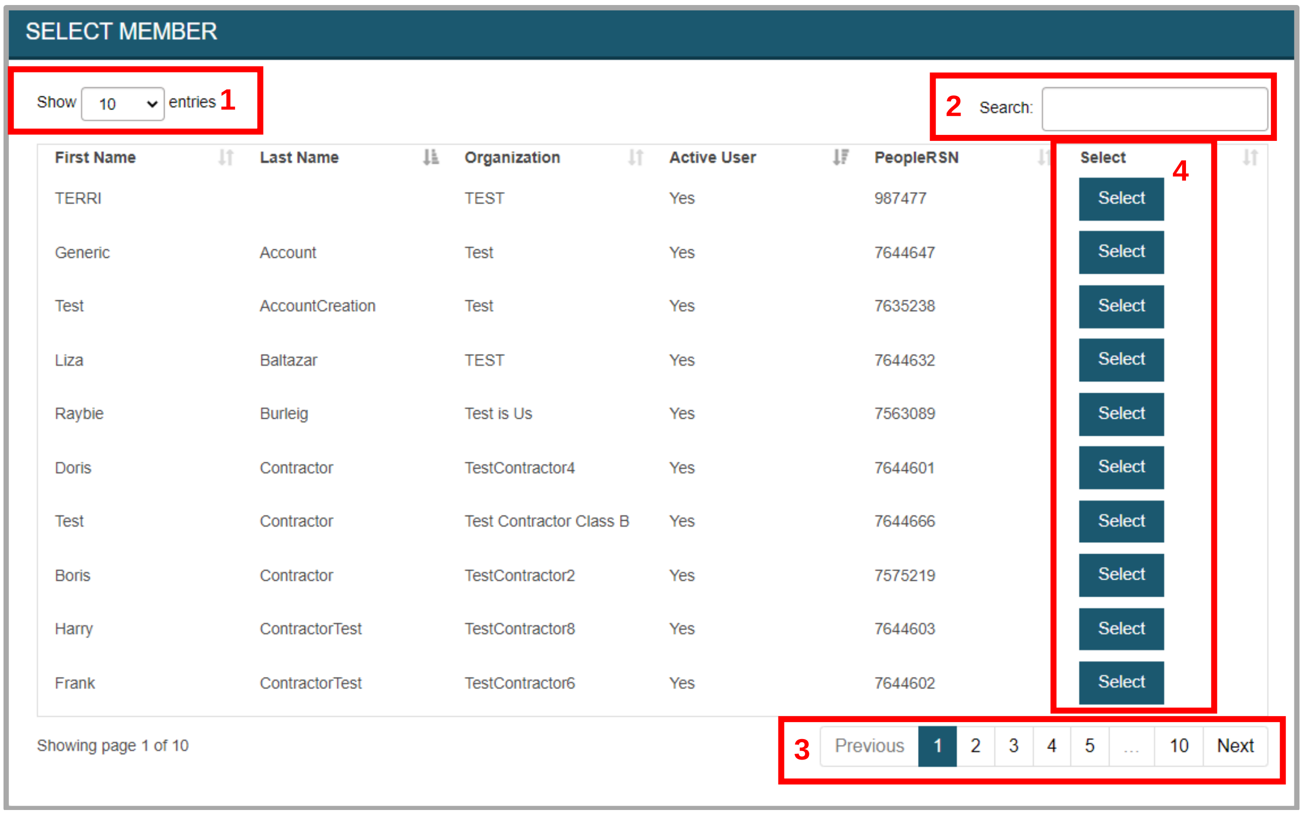
Note:

- 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.

Step 2 - Selecting Member and Assigning Membership Criteria

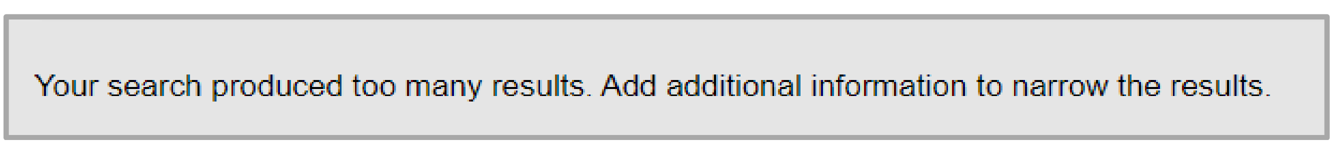
Once you have submitted your search criteria the results will be displayed below the search box where you will be able to:

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 Member you wish to add to your application by clicking “Select” button next to the name of the person you wish to add as a member.
5. Go back to the My Services by clicking on the “Return to My Services” button (not shown).
6. Perform another search



First Name	Last Name	Organization	Active User	PeopleRSN	Select
TERRI		TEST	Yes	987477	Select
Generic	Account	Test	Yes	7644647	Select
Test	AccountCreation	Test	Yes	7635238	Select
Liza	Baltazar	TEST	Yes	7644632	Select
Raybie	Burleig	Test is Us	Yes	7563089	Select
Doris	Contractor	TestContractor4	Yes	7644601	Select
Test	Contractor	Test Contractor Class B	Yes	7644666	Select
Boris	Contractor	TestContractor2	Yes	7575219	Select
Harry	ContractorTest	TestContractor8	Yes	7644603	Select
Frank	ContractorTest	TestContractor6	Yes	7644602	Select

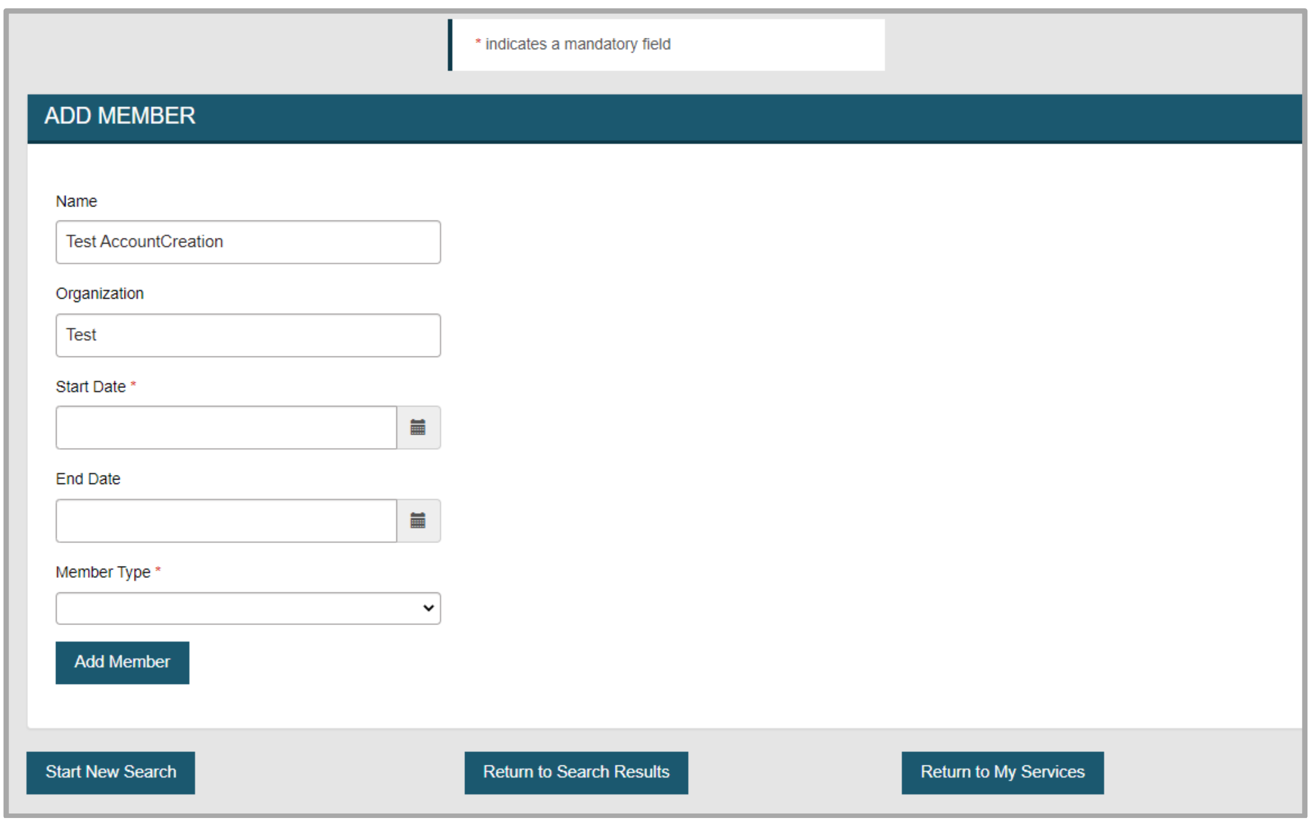
Depending on what criteria is used to perform the search, if the results exceed 100 results, you will get a message at the bottom of the page, as shown below. If the collaborator is not shown in the results, the search criteria should be refined. This can be done by making the previously used search 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.



Step 3 - Assigning Membership Criteria

After you have selected the member, you wish to associate with your account you will be taken to the "Add Member" page. On this page you will be able to add / do the following:

1. **Start Date** (mandatory) – This can be set in the past or in the future. If the date is in the future, the member will not be able to apply for a permit on your behalf until the selected date.
2. **End Date** – This can be left blank or can be set in the past or the future. If the date is the current date or date in the past, the user will no longer be able to apply on your behalf. If the date is in the future, they will no longer be able to apply on your behalf from that date forward. If you leave it blank there is no restriction on applying on your behalf, if the Start Date is the current date or in the past.
3. **Member Type** (mandatory) – You will need to assign a membership role. For what each of these roles mean, in terms of the application, refer to the Apply on Behalf of Guide.
4. **Add Member** – To add the selected user as a Member after filling in, at a minimum, items 1 and 3.
5. **Start a New Search** – Select this if you wanted to start a new search without adding the currently selected user as a member.
6. **Return to Search Results** – Select this if you want to return to the previous search results without adding the currently selected user as a member.
7. **Return to My Services** – Select this if you wish to return to the My Services home page without adding the currently selected user as a member.

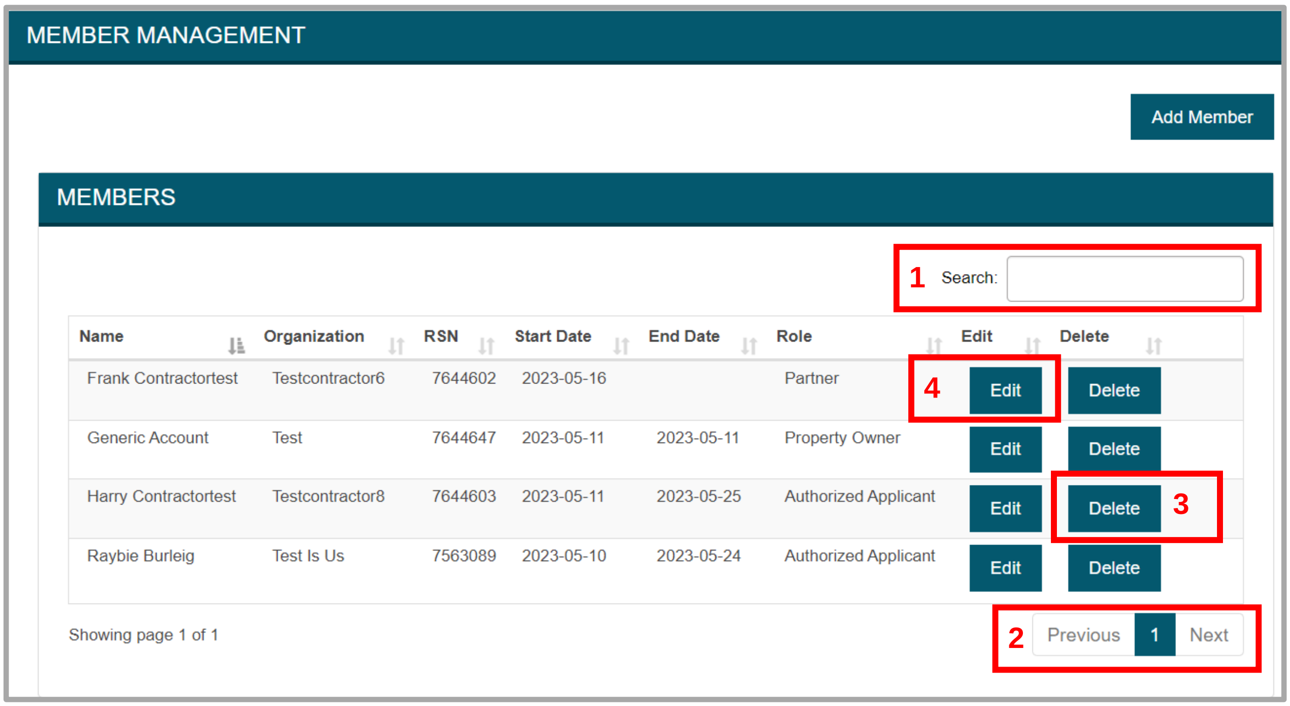


After you click on "Add Member" the user will be added to your user account as a member. If the addition is successful, you will be returned to the My Services page. If there is an error adding the member you will see an error message letting you know there are items for you to address before you can add the member.

SECTION 2 - EDITING MEMBERSHIPS

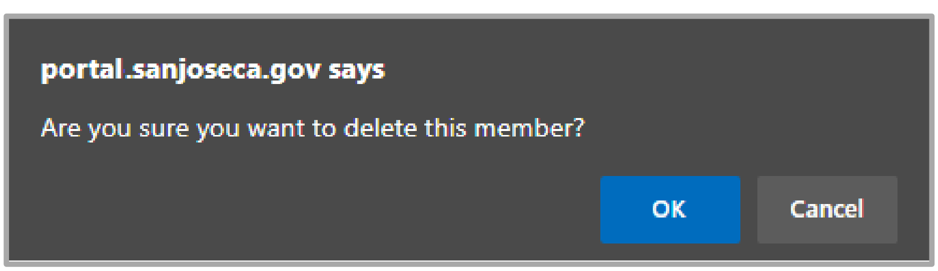
After you have added members to your account you have several options available to you. You can add more members by following the steps from the previous section or you can manage the members that you have already added. To manage added members, scroll down to the Member Management section on the My Services page. Underneath the "Add" button there will now be a new section called "Members." In this area you will have the ability to:

1. Filter through the member by utilizing the "Search" box at the top right.
2. Scroll through the added members (if you have more than 10 members).
3. Delete / Remove a member associated with your account.
4. Edit the existing member.



Option 1 – Deleting Members

If you no longer wish to have a member be associated with your account, and you don't wish to see their information in the Member section, clicking on the "Delete" button. A pop-up will display asking you to confirm the deletion. By clicking "Ok" the member will be deleted. By clicking "Cancel" you the member will not be deleted.



Option 2 – Editing Members

If you wish to update the membership characteristics of an existing member, click on the "Edit" button. This will take you to the "Edit Member" screen where you will be able to add / edit the following:

1. **Start Date** – Update this field if the start date of the membership where the user can apply on your behalf is incorrect.
2. **End Date** – This can be used if the membership will expire in the future (i.e. member is leaving the company) and you don't wish to delete the member from your account. On the day of the end date, the user will no longer be able to apply on your behalf. You will also still have the option to delete the member in the future.
3. **Member Type** – This can be used to adjust the membership type in case the member was given an incorrect role (i.e. authorized applicant vs. employee)
4. **Update Member** – This will update the member with the adjustments made under options 1 through 3. If the update is successful, you will be taken back to the My Services page. If it is no successful, an error will display informing you of what is incorrect / missing.
5. **Return to My Services** – This will allow you to return to the My Services page if you did not wish to commit any changes to the member.