

Document*Link*[™] User Guide

Public Portal Edition

Document*Link*[™] Powered By



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Logging Out/Logging In

For your security, you should always log out of the Public Portal when you are done using it. To log out, click the **Log Out** link at the upper right-hand corner of the page. This returns you to the login page.

To log in again, enter the email address and password you supplied for your user.

Searching for a Property

To submit a form or a concern for a property, you must first locate the parcel page for the property. Typically, you do this through the property search page. The property search page lists every property in town.

When you log in to the Public Portal, the property search page is the first page you see. You can also return to the property search page at any time by clicking on the **Search for Properties** link, located below the PermitLink banner.

Use the following procedure to run a property search.

1. Go to the property search page if you are not already there.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the property you want to view. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more property listings.
4. Click the listing for the property you want to view.
The parcel page for the selected property appears.

Using Online Forms

Understanding the Document Tree

You can access the existing forms associated with a property through the Document Tree on its associated parcel page, as well as submit new forms for the property. The Document Tree (example below) is found on the right-hand side of the active parcel page.



The Document Tree groups forms by the department responsible for reviewing and approving them. Within a department group, forms are further grouped by document type. If the account has any existing forms for a particular document type, the number of forms appears to the right of the document type name. You can use the Document Tree icons shown below to navigate to the desired form.

▶	Click this icon to expand a group.
▼	Click this icon to collapse a group.

When a document type group is expanded, it lists any existing forms of that document type associated with the active parcel page. Click the listing for a form to open the form. To start a new form of that document type, click the new form icon () to the left of the document type name. (If the new form icon does not appear to the left of the document type name, then documents of that type can only be created by the municipality. The public can still view those documents, however.)

Submitting a Form

Use the following procedure to submit a form.

1. Go to the relevant parcel page. Access the parcel page by running a property search to locate it, or by going through your watch list maintained under “My Properties.”
2. Locate the Document Tree on the active parcel page.
3. Locate the name of the department responsible for reviewing and approving the form you want to submit. If necessary, click the arrow icon to the left of the department name to expand that part of the Document Tree. A list of document types available for that department appears under the department name.
4. Locate the relevant document type in the list then click the new form icon () to the left of the document type name.
The form appears. The system has already filled out some fields using information from the active parcel. A red, vertical line appears next to any required fields.
5. Fill out the applicable form fields that are remaining.
6. Sign the form as the submitter, if applicable, using the following subprocedure:
 1. Locate then click the relevant signature area on the form.
A signature window appears.
 2. Sign your name in the space provided. Use the mouse like a pen to make your signature inside the signature box. Hold down the left mouse button when you want “ink” to appear and release it when you do not (as when you are repositioning the mouse pointer to dot an “i” or start your last name). If you are dissatisfied with the signature, click **Clear** and try again.
 3. Check the “I certify that my electronic signature operates as if I had signed this document in paper form” checkbox.
 4. Type your name in the name input box.

5. Click **Save**.

The signature window disappears. Your name and signature and the current date appear on the form.

7. Click either the **Save** icon or the **Submit** button.

The form is submitted and a confirmation email is sent to you. A confirmation prompt appears to let you know the form has been saved as a draft.

8. Click **OK**.

The confirmation prompt closes, as well as the form.

Viewing a Form Previously Submitted for a Property

You can view a printer-friendly PDF copy of any submitted form in its current state. Use the following procedure to view a form that has been submitted for the property.

1. Go to the relevant parcel page. Access the parcel page by running a property search to locate it, or by going through your watch list maintained under "My Properties."
2. Locate the Document Tree on the active parcel page.
3. Locate the name of the department responsible for reviewing and approving the form you want to view. If necessary, click the arrow icon to the left of the department name to expand that part of the Document Tree. A list of document types available for that department appears under the department name.
4. Locate the relevant document type in the list. Underneath the document type, locate the specific form you want to view. If necessary, click the arrow icon immediately to the left of the document type to show existing forms of that document type associated with the active parcel.
5. Click the listing for the form you want to view.
The PDF copy takes a few moments to generate, then appears in your default PDF file viewer. You can search, print and save the PDF copy while it is open in the viewer.
6. Close the PDF copy when you are done viewing it.

Viewing a Form You Submitted

You can view any form you submitted in its current state, along with the form's status and payment information. Use the following procedure to view a form you submitted.

1. Click the **My Documents** link, located below the PermitLink banner.
A list of the forms you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the form you want to view. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more form listings.
4. Click the form listing to select it.

5. Click either the **Open** (folder) icon or the **Open Item Selected** button.
The form appears with the information and signatures previously submitted.
6. Click either the **Close** icon or the **Close/Cancel** button to close the form when you are done viewing it.

Editing a Form You Submitted

After reviewing a form you submitted, the municipality might find that more information is needed before it can be processed. You can open the form through the Public Portal and add the necessary details as long as the form is still a draft. Use the following procedure to edit a form you submitted.

1. Click the **My Documents** link, located below the PermitLink banner.
A list of the forms you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the form you want to edit. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more form listings.
4. Click the form listing to select it.
5. Click either the **Open** (folder) icon or the **Open Item Selected** button.
The form appears with the information and signatures previously submitted.
6. Make your changes to the form.
7. Click either the **Save** icon or the **Submit** button.
A confirmation prompt appears to let you know your changes have been saved.
8. Click **OK**.
The confirmation prompt closes, as well as the form.

Uploading an Attachment

Forms commonly need supporting documents, such as drawings or licenses, in order to be processed. A PDF version of a supporting document can be attached to a form by uploading it to the system. Use the following procedure to locate a form you submitted and upload an attachment to it.

1. Click the **My Documents** link, located below the PermitLink banner.
A list of the forms you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the relevant form. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more form listings.
4. Click the form listing to select it.

5. Click the **Attachment Center** icon.
The “Attachments” window appears.
6. Click the **New Attachment** icon.
The “Attachment/File Upload” window appears.
7. Click **Browse**.
The file browser appears.
8. Navigate to the folder containing the file you intend to attach, select the file then click **Open**.
The file browser closes. In the “Attachment/File Upload” window, the name of the file appears to the right of the “Browse” button and in the “Description” input box.
9. (Optional) Change the description to something more recognizable.
10. Click **Upload**.
The message “Processing Upload Request” appears while the attachment uploads to the system. The “Attachment/File Upload” window closes when it is done and the attachment appears in the list of attachments for the form.

Viewing an Attachment

Use the following procedure to view an attachment.

1. Click the **My Documents** link, located below the PermitLink banner.
A list of the forms you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the relevant form. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more form listings.
4. Click the form listing to select it.
5. Click the **Attachment Center** icon.
The “Attachments” window appears, listing the documents that have been uploaded for the selected form.
6. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set above a column heading to filter the records by that criteria.)
7. Locate the listing for the attachment you want to view. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more attachments.
8. Click the checkbox to the left of the listing for the attachment you want to view.
9. Click the **Open** (folder) icon.
A prompt may appear asking what program you want to use to view the file. Respond to the prompt with your preference. The file opens.

Handling Your Concerns

Submitting a Concern

If you have a concern about a property, you can use the Public Portal to submit your concern to the relevant municipal department. Use the following procedure to submit a concern.

1. Go to the relevant parcel page. Access the parcel page by running a property search to locate it, or by going through your watch list maintained under “My Properties.”
2. Click **Enter a Concern**.
The concern form appears on the parcel page.
3. Select the relevant municipal department from the drop down menu.
4. Enter a brief description of your concern in the subject line.
5. Enter your concern in the **Additional Information** section.
6. Click **Submit Concern**.
A confirmation prompt appears, letting you know that your concern has been successfully submitted.
7. Click **OK**.
The confirmation prompt closes, as well as the concern form.

Viewing a Concern You Submitted

Once you have submitted a concern regarding a property, the concern appears in the municipality’s system and the department you selected will be able to review and respond to the concern. If you want to check for a response, you can view the concern and look in the response section. Use the following procedure to view a concern you submitted.

1. Click the **My Concerns** link, located below the PermitLink banner.
A list of the concerns you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the concern you want to view. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more concern listings.
4. Click the listing for the concern you want to view.
The concern form for the selected concern appears. If available, the response is displayed on the concern form.
5. Click **Cancel** to close the concern form when you are done viewing it.

Editing a Concern You Submitted

After submitting a concern, you may realize that you need to make a correction or add more details. You can edit the concern as long as its status is still “Pending.” Use the following procedure to edit a concern you submitted.

1. Click the **My Concerns** link, located below the PermitLink banner.
A list of the concerns you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the concern you want to edit. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more concern listings.
4. Click the listing for the concern you want to edit.
The concern form for the selected concern appears.
5. Make your changes to the concern.
6. Click **Save**.
A confirmation prompt appears to let you know your concern has been resubmitted.
7. Click **OK**.
The confirmation prompt closes, as well as the concern form. The concern's creation date updates in the list of concerns.

Deleting a Concern You Submitted

You can delete a concern you submitted as long as its status is still "Pending." Use the following procedure to delete a concern you submitted.

1. Click the **My Concerns** link, located below the PermitLink banner.
A list of the concerns you submitted appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the concern you want to delete. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more concern listings.
4. Click the listing for the concern you want to delete.
The concern form for the selected concern appears.
5. Click **Delete**.
A confirmation prompt appears to let you know your concern has been deleted.
6. Click **OK**.
The confirmation prompt closes, as well as the concern form. The concern is removed from the list of concerns.

Monitoring Properties

Adding or Removing a Property from Your Watch List

You may find you want to monitor the activity at one or more properties in the municipality. This may be a long-term interest (such as if you are the property owner) or a short-term interest (such as if you are a building contractor doing

work on the property). You can keep tabs on a property more readily by adding it to your “watch list.” Your watch list is maintained under “My Properties” and provides a quick alternative to searching the list of all properties in the municipality in order to access a parcel page.

Use the following procedure to add a property to your watch list.

1. Go to the relevant parcel page. Locate the parcel page by running a property search.
2. Click **Add to My Properties**.
A confirmation prompt appears.
3. Click **OK** to close the confirmation prompt.

Use the following procedure to remove a property from your watch list.

1. Go to the relevant parcel page. Access the parcel page through your watch list maintained under “My Properties.”
2. Click **Delete from My Properties**.
A confirmation prompt appears.
3. Click **OK** to close the confirmation prompt.

Accessing a Property in Your Watch List

All properties you have added to your watch list appear on your “My Properties” page. From here, you can quickly locate properties you want to check up on. Use the following procedure to access the parcel page for a property you have been monitoring.

1. Click the **My Properties** link, located below the PermitLink banner.
Your watch list appears.
2. Apply filters to narrow down the list, if necessary. (Enter or select a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria.)
3. Locate the listing for the property you want to view. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more property listings.
4. Click the listing for the property you want to view.
The parcel page for the selected property appears.

Browsing the Permit List

Accessing the Permit List

Click the **Show Permit List** link, located below the PermitLink banner, to access the Permit List.

Locating a Permit in the List

The Permit List contains a listing for every permit in the system. The number of permits in the list can be quite large, so some features have been included to make it easier to find the one you want.

Use the following tips to locate a specific permit in the list. (To select a permit once you have located it, click on the listing and it will be highlighted. You can then use the icons/buttons to either view a printer-friendly PDF copy of the permit or go to the property associated with the permit.)

- Verify the relevant permit year is selected and, if not, click **Choose Permit Year** then select the year from the drop down menu that appears. If you are unsure of the year, select **All** from the drop down menu.
- Apply filters to narrow down the list. Do this by entering or selecting a search value in the input box, drop down menu or radio button set below a column heading to filter the records by that criteria, or by running a permit search. (Refer to “Running a Permit Search” for instructions.)
- Sort the list. Click a column heading to sort the list by that criteria.
- Click the navigation buttons below the list to see more permit listings.
- If you want to locate another permit, you might need to expand the list again by removing some/all filters. To clear a filter that you applied through an input box, delete all the text in the input box then press **Enter**. To clear a filter that you applied through a drop down menu, select the blank option at the top of the drop down menu. To clear all filters currently applied to the list, click **Clear Filters**.

Running a Permit Search

Use the following procedure to run a permit search.

1. Access the Permit List.
2. Make sure the relevant permit year is selected.
3. Select the type of information you want to search.
 - Select **Form Data** to search text in forms submitted through the system.
 - Select **Keywords** to search the keywords associated with the forms.
 - Select **Scanned Document Content** to search text in forms imported into the system.

4. Enter the search text in the appropriately labeled input box.

5. Click **Search**.

The Permit List is filtered by the search parameters.

6. Locate the listing for the permit you wanted to find. Click a column heading to sort the list by that criteria. Click the navigation buttons below the list, if necessary, to see more permit listings.
7. Click **Clear Filters** if you want to run a new search.

Editing Your User Profile

Updating Your Contact Information

Use the following procedure to update your contact information.

1. Click the **Edit My Profile** link at the upper right-hand corner of the page.
The “Public User Registration and Management” page appears.
2. Make the necessary changes to your contact information.
3. Click **Submit**.
A confirmation prompt appears with the message “Your User Profile has been updated.”
4. Click **OK**.
The confirmation prompt and the profile page close.

Changing Your Password

Your password allows you to log in to the Public Portal. Use the following procedure to change your password.

1. Click the **Edit My Profile** link at the upper right-hand corner of the page.
The “Public User Registration and Management” page appears.
2. Click the **Check to Unlock and Reset Your Password** checkbox to select it. (This unlocks the password fields.)
3. Enter your new password.
4. Reenter your new password.
5. Click **Submit**.
A confirmation prompt appears with the message “Your User Profile has been updated.”
6. Click **OK**.
The confirmation prompt and the profile page close.