Village of Golf

Resident Permit Portal User Guide

January 2020

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1 Village Resident Permit Portal User Guide

The Village of Golf Building Department has created a permit document portal for online permit processing and storing all related documents related to approving permits and completing the project. All permit and building related documents are required to be stored on the permit portal. These include:

- Permit Application

- All required documents for the permit, including architecture plans and drawings

- Zoning and Engineering documents (if required)

- Permit Fees and Bond document

- Approved permit to be posted in window of residence

- Inspection Reports

The following is the high-level permit process:

- Obtain permit application form from Village of Golf Website - https://nebula.wsimg.com/e2ae7c205bcd3eaa862b645729da6927?AccessKeyId=FD02CE8BC4C04004E0C4&disposition=0&alloworigin=1

- Submit form to Village in one of the following ways (first one is preferred):

    o Complete fillable .pdf permit form online, save it, and e-mail to permitadmin@villageofgolf.us

    o Print, sign, and scan into a file that can be e-mailed to permitadmin@villageofgolf.us

    o Print, sign, and drop off at Village Hall

- Once the Village Permit Administrator receives the signed permit application, the Admin will create a folder and set of sub-folders in the Village Permit Portal and send an e-mail with a link to activate. See Getting Access to Permit Document Portal section below.

- Once on the portal, a folder with your permit number, address, and last name will be on the left side:
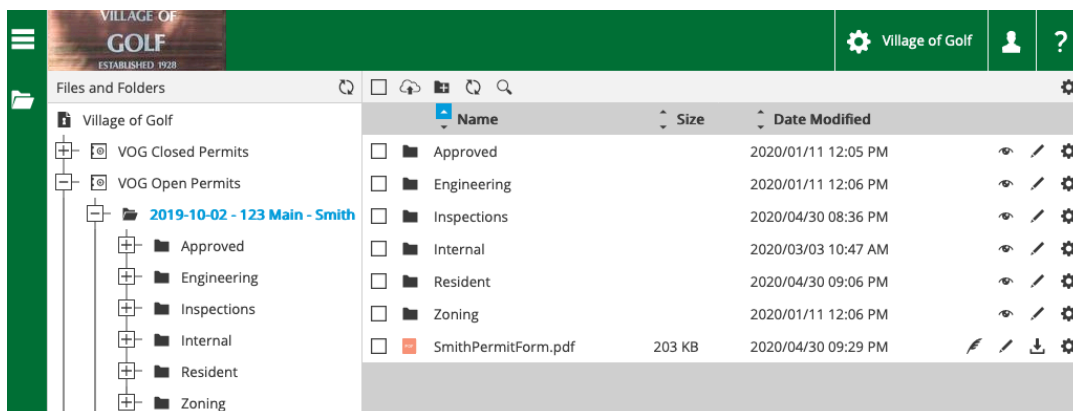
- Once you click on your folder name, you will then be able to:

o   View Permit Form

o   Upload required documents (e.g. plan, plats, …) to the **"Residents"** directory (see below)

o   See documents (including inspection reports) related to the permit and project by clicking on the names of the sub-folders.

o   Send notifications with messages to Village personnel (e.g. Building Commissioner for zoning or Village Engineer)

o   Receive notifications for updated documents or when action is required

When the permit is closed, the files will be archived and access to the portal will be removed.
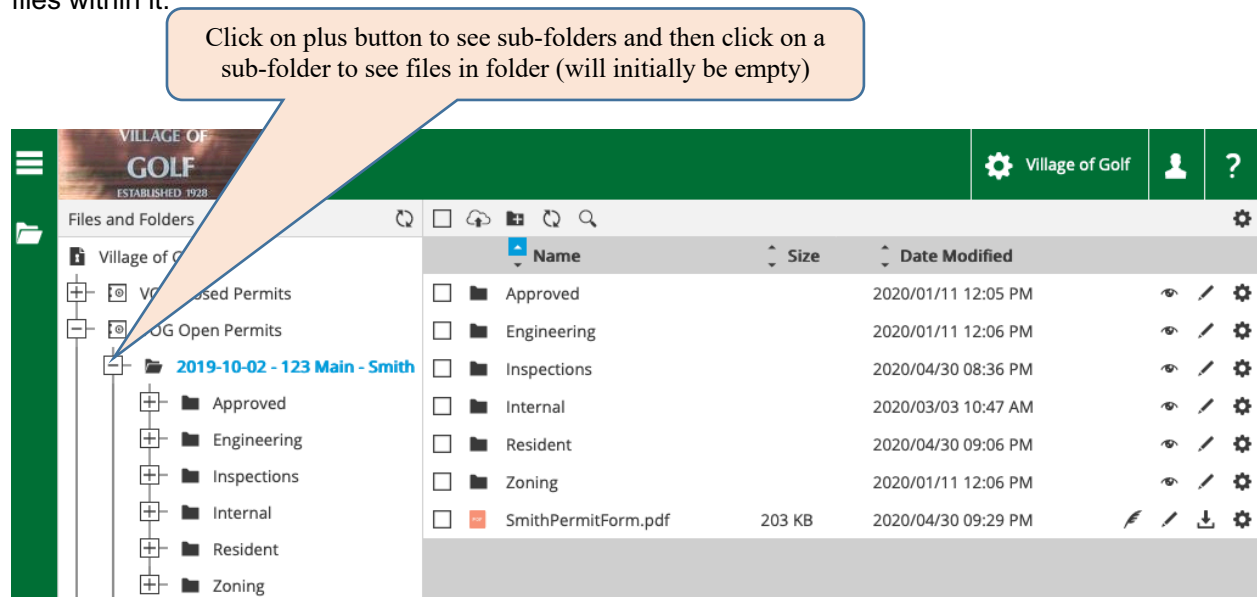
If you would like other parties such as a general contractor to have access to the portal, please provide the e-mail address(es) to the permit administrator when submitting the permit form.

You are not authorized to delete or overwrite uploaded documents. If you have new versions, append a version number or more recent date to the file name before uploading (as it cannot be changed once uploaded).

The following sections provide details on using the portal.

1.1   Navigating the Portal

The portal works like a windows or mac file system. Clicking on a folder or sub-folder will show the files within it:

Click on plus button to see sub-folders and then click on a sub-folder to see files in folder (will initially be empty)


Common Tasks:

- **View a File** - Click on file name and it will open in a new browser window.

- **Download a file** – Click on the ⬇ on the right side of the file row

- **Upload a file** – See next section on Uploading Documents

- **Send Notifications/Messages** – Once files are uploaded, a notification message can be sent to selected village parties with information about the uploaded file(s) in order for them to review and process. See Sending Notification Messages.

- **Receive Notification Message/Link** – A Village party can send an e-mail with a message that contains a link to the related document or folder.

1.2   Uploading documents

Residents are only allowed to upload files into the "Residents" sub-folder. Once uploaded, the file cannot be deleted. If uploading new versions of a file, please add a date or version number. To upload a file(s):

1. Click on the "Resident" sub-folder (If you do not see the sub-folder, click on the ⊞ next to the main folder name):
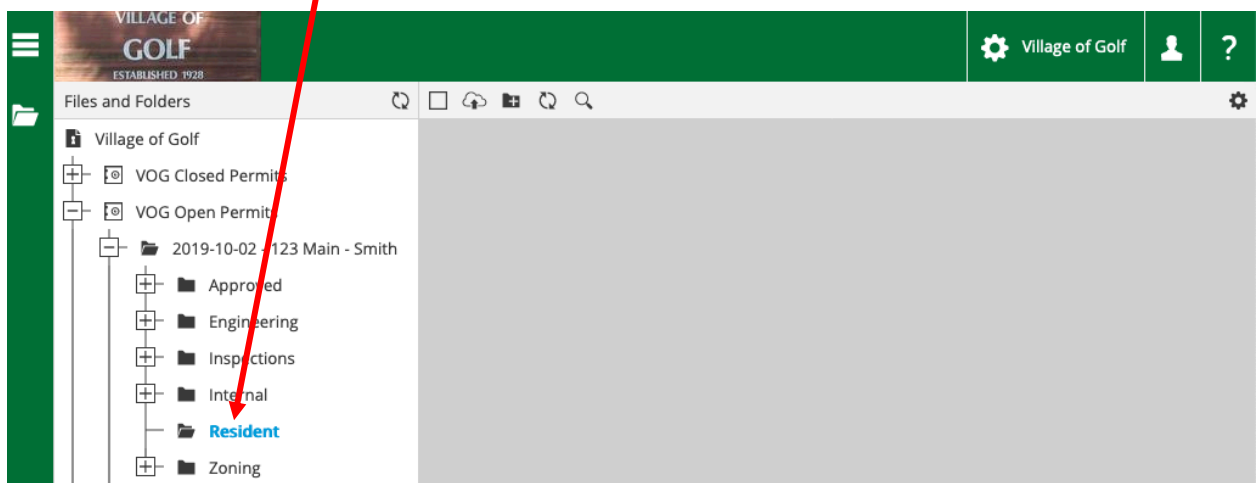

2. From your file system window, drag the files onto the gray area shown above. You can also press the browse link and a file system window will appear to select the files to upload.

1.3   Sending Notification Messages

To accelerate processing, it is recommended to send a notification message to the appropriate village party when a file(s) is uploaded. A link with a message can be send from an entire folder or an individual file to the selected party(ies).

To send a notification message for a file or folder:

1. Select the file or folder to send the notification for and press the ⚙ icon on the right side:
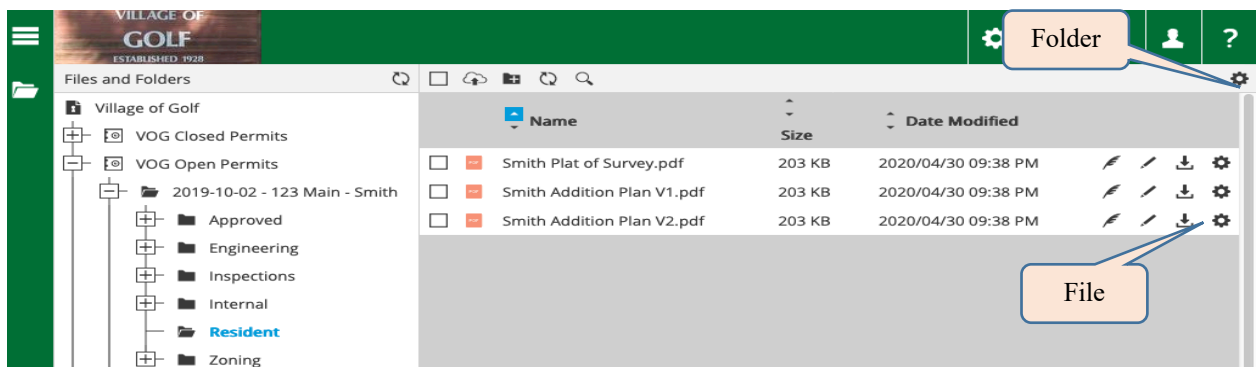
2. Select the party(ies) to notify, fill in a message, and press send:

3. Press the ← to go back to the list of folders.

1.4 Receiving Notification Messages

When a Village party has updated a document or has comments on a document, the party can send a notification e-mail just as shown above to the resident with a message and link. Read the message and press the link to view the file or folder:

1.5 Getting Access to Permit Document Portal

- You will receive an e-mail from the Village of Golf Permit Admin with instructions to activate your account on the portal with content that looks like:

Personal Message: Please upload all required permit documents.

Enjoy access to your files any time through the Client Portal. Your data is always backed up and exchanging files in the client portal is secure, unlike email attachments.

The SmartVault Client Portal is also very easy to use. If you can click a link in an email, you can use SmartVault to access your files. It's really that easy. For a quick tour of the Client Portal, click here: Client Portal Orientation

Please click the **'Activate'** button to finish your account activation.

Activate

We are always here to help, so feel free to contact us with questions or feedback.

Thank you,

Michelle Shapiro
Village of Golf Permit Administrator
permitadmin@villageofgolf.us
847-998-8852

- Press the Activate link and you will be presented a partially pre-filled form to fill in. You must put in a Password (and Confirm Password) and select the " I agree to SmartVault's Terms of Service check box. Once filled in, press the "Create my User" button as shown below:

The folder 2019-09-05 _____ r has been shared with you.

Please complete the form below to access it.

Time Zone:	(UTC-06:00) Central Time (US & Canada)
First name:	Jerry
Last name:	
Email address:	
Phone number:	
Password:	SHOW

Minimum length is 12 characters; must include at least one of each of the following: upper case letter, lower case letter, number, punctuation
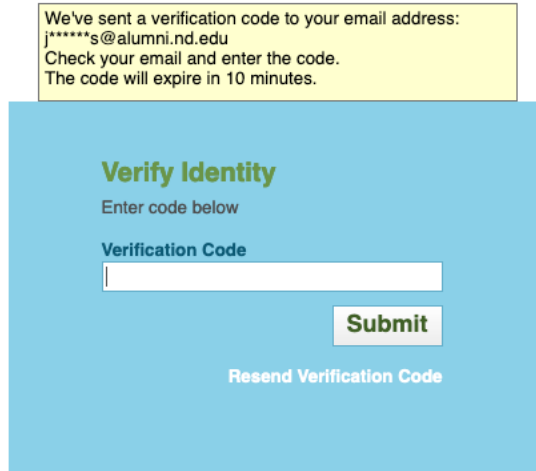
Password Strength:	
Confirm password:	SHOW

☐ I agree to SmartVault's Terms of Service

Create My User

- You will then get send a verification code to enter:

We've sent a verification code to your email address:
j******s@alumni.nd.edu
Check your email and enter the code.
The code will expire in 10 minutes.

Verify Identity

Enter code below

Verification Code

Submit

Resend Verification Code

- You will then be shown a welcome screen and see the folder for your permit documents: