Self-Serve - Team Settings Guide

What is Team Settings?

The Team Settings feature is available in the Self-Serve Application Portal. It allows customers to manage who can access and work on your projects. It provides flexibility for various team members, such as architects, constructors, business owners, and designers, to access project information, see status, City feedback, and perform tasks. Team Settings can be managed both during the draft stage of the application and after submission.

Which types of applications is this available for?

- Non-residential and large scale residential projects: Major Development Permits, Commercial Building Permits and related Trade Permits
- Residential projects: Development Permits, Building Permits, Home Improvement Permits, and related Trade Permits

Team Roles and Permissions

What are the different team roles available?

- **Team Owner (Permit Holder):** The primary contact with full access. Max. one (1).
- **Team Administrator (Can Manage):** Helps the Team Owner manage other team members. Max. one (1), optional role.
- **Team Members (Can Edit):** Can edit and perform tasks on the project. Unlimited members.
- **View Only Members (Can View):** Can view project details and receive updates. Unlimited, typically the business owner or a home owner.

Team Owner (Permit Holder)

The Team Owner, also known as the ‘Permit Holder’, has full access to the project, can add/remove team members, and assign access. This is the **only** role that can assign a user to the Team Administrator (manage) role.

Team Administrator (Can Manage)

A Team Administrator can manage the Team Members and View Only members for the project. There can only be *one (1)* Team Administrator and the Team Administrator cannot be modified by other users who have been added to the project.

Functions of the Team Administrator include:

- Team Management Functions
    - Adding new Team Members when first applying for permits or after the application has been submitted successfully
    - Viewing a list of current Team Members
    - Managing current Team Members' access type
    - Removing current Team Members' access to the project

- Application / Project Management Functions
    - Full access to view and modify project
    - Receiving all email notifications related to the project

Team Members (Can Edit)

Team Members have specific editing permissions and the number of Team Members who can be associated with a project is *unlimited*.

Functions of the Team Member include:

- Viewing Details (Summary and Details tabs)
- Downloading and/or uploading documents
- Replying to and submitting details for More Information Requests (MIRs)
- Updating subcontractors
- Submitting professional involvement documents
- Paying fees
- Booking inspections (can only be done by users who are granted the Team Member who can schedule and cancel Inspections permissions)
- Requesting a revision
- Add additional trade permits

View Only Members (Can View)

View Only Members can view application and project details but have limited actions. The number of View Only Members who can be associated with a project is *unlimited.*

Functions of the View Only Member include:

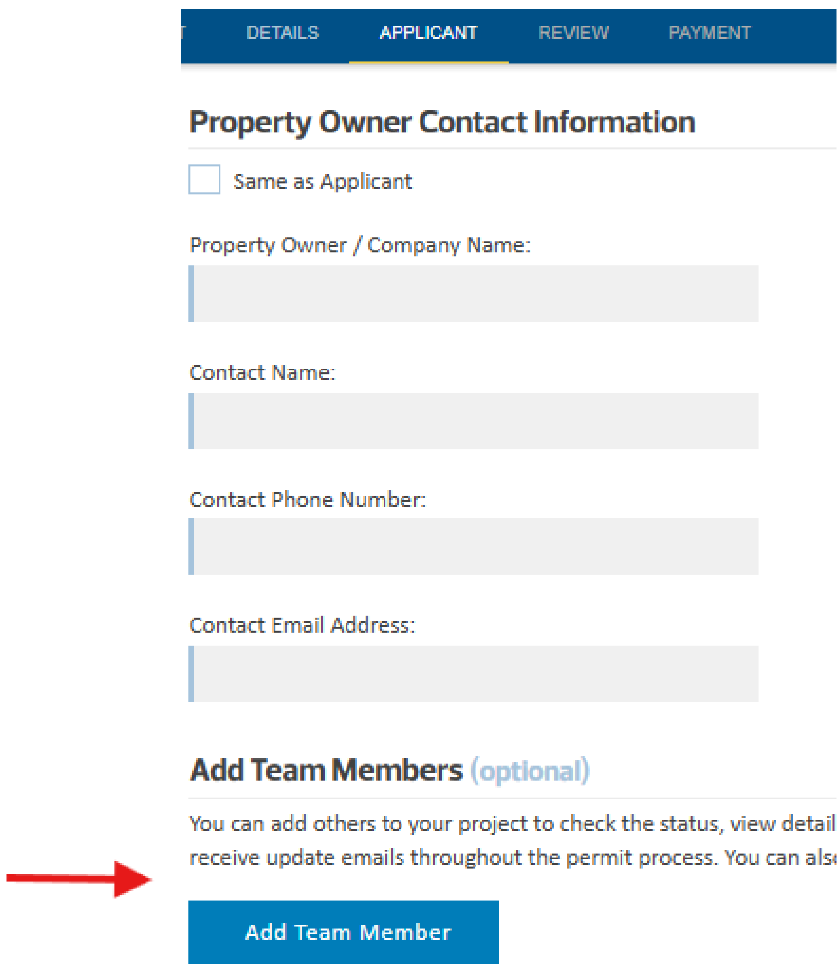
- Paying fees
- Viewing project information (Summary, Documents, Details & Inspections tabs)
- Downloading documents
- Receive email notifications (e.g. confirmations for when applications are submitted, fees are paid, permits are issued, More Information Requests… etc.)

Team Management

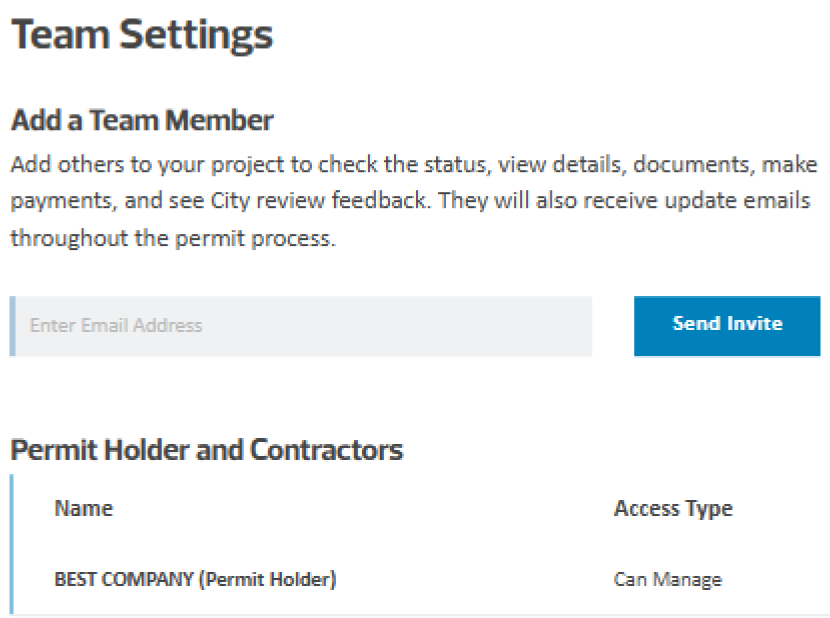
The Team Owner (Permit Holder) and the Team Administrator (Can Manage) portals have the option to manage the Team Members and View Only Members.

Add a Team Member - Draft Stage

1. Log in at selfserve.edmonton.ca
2. Start the desired application
3. On the APPLICANT tab, select *Add Team Member*

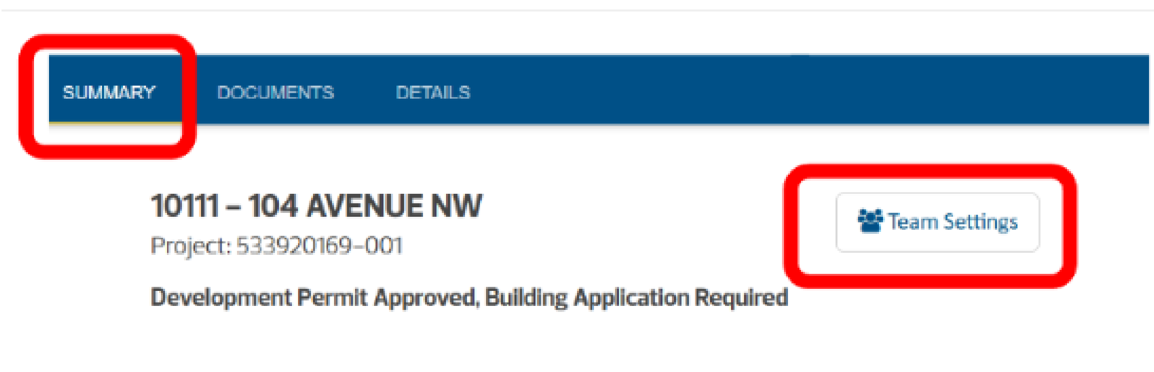


4. Send an invitation via email

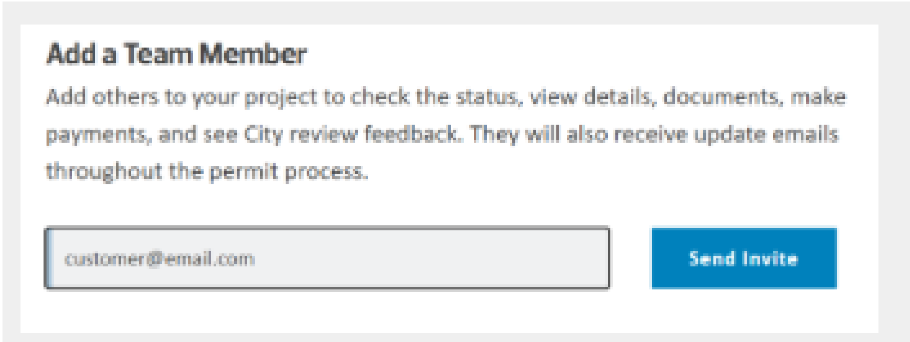


Add a Team Member - After Submission

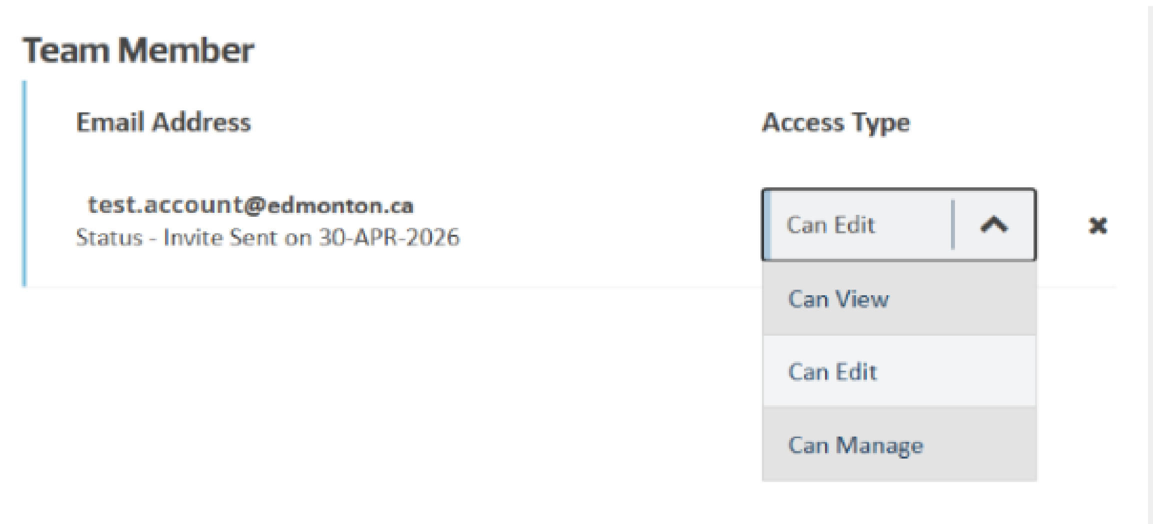
1. Log in at selfserve.edmonton.ca
2. Click on the permit
3. Open the SUMMARY tab
4. Click on *Team Settings*, underneath or left of the address



5. Send an invitation via email

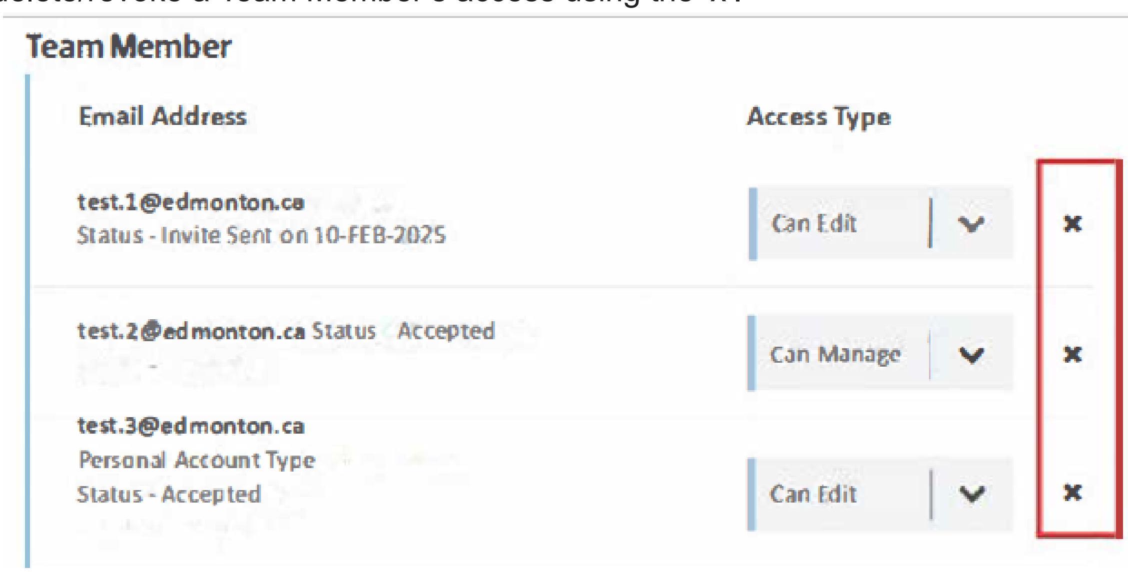


6. Select the Access Type drop down menu and choose the type



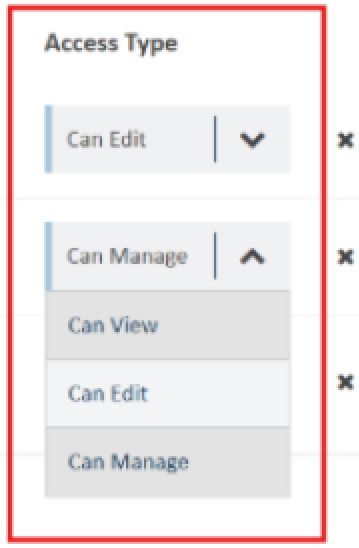
Remove a Team Member

The Team Owner (Permit Holder) or the Team Administrator (Can Manage) can delete/revoke a Team Member's access using the 'x'.

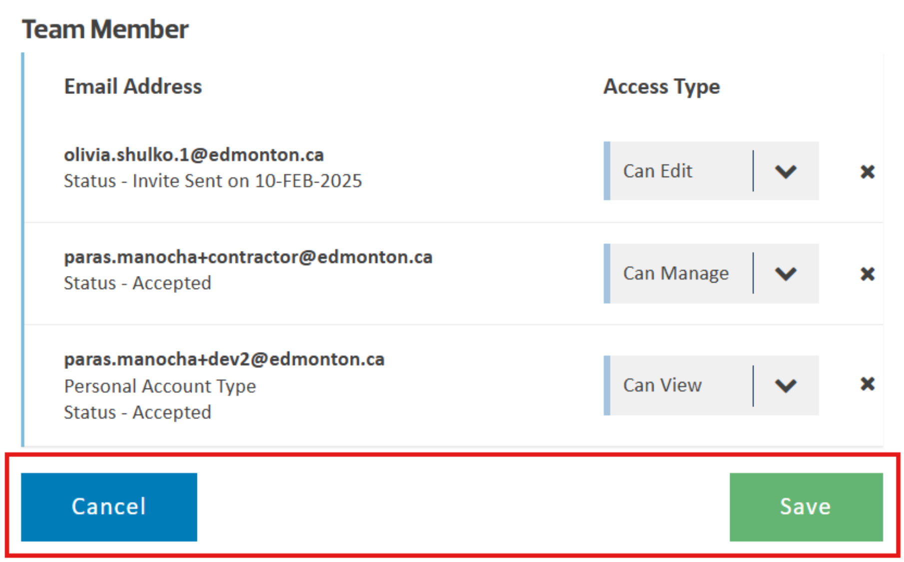


Change Access for Team Member

When a new Team Member is added, the default access type is “Can Edit”. The Team Owner or Admin can change this access using the drop-down.



The “Save” button is used to save the new selection and a message showing “Changes Saved Successfully” is shown. You can also click the “Cancel” button to close the window.



Email Notifications

All Roles within a Team will receive relevant email notifications related to the application/project. Email notifications will only be sent to Team Members after the application has been submitted.

The email notifications for users who have been assigned a role on a team are based on the role that has been assigned to them.

Role	Email Notifications
Team Owner	Receives all email notifications (as per current functionality)
Team Administrator	Receives all email notifications
Team Member	Receives all email notifications
View Only Member	Receives Only the Following Email Notifications as a CC recipient for initial applications and revisions: • Added to project (to recipient) • Application Complete • Payment Required • Payment not received yet • Payment Received • Placed in Queue • Assigned for Plan Review • DP approval outstanding / pending • No DP Required • Refusal • Cancellation • Permit Approved / Issued / Decision Made / Refused • Permit Prepared • Selective Interior Demolition Permission Granted • Selective Interior Demolition Request Refused • PSR and Occupancy for BP only

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