pronto

Greater | Grand Sudbury

Walkthrough Guide

Introduction to Pronto

Registering an Account in Pronto

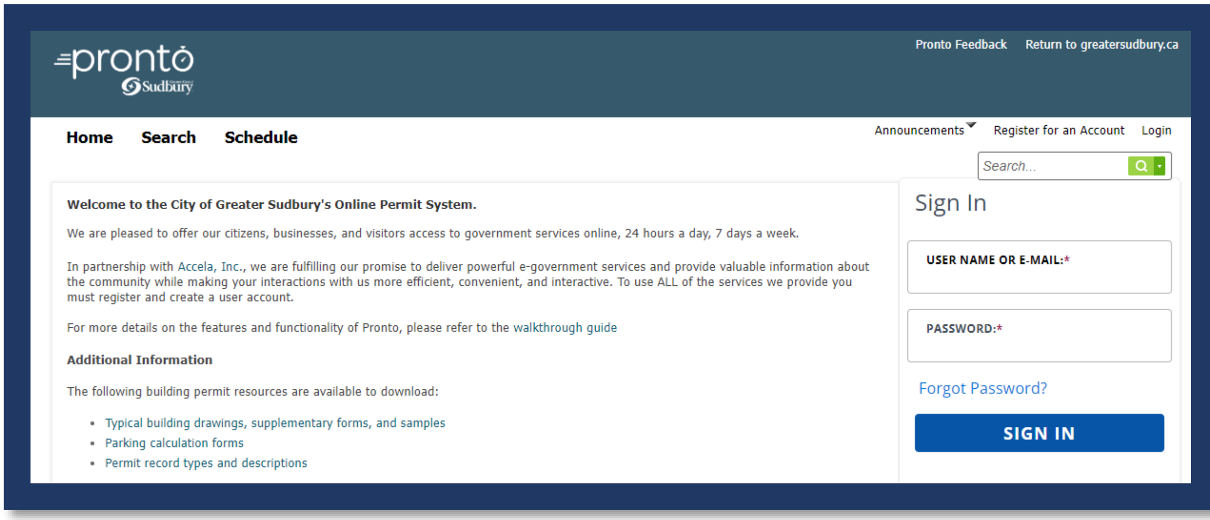
TO REGISTER AN ACCOUNT:

1) Using the latest version of your Google Chrome, Firefox, or Microsoft Edge web browser, navigate to the City's Pronto portal.
2) Select *Register for an Account* in the top right corner of the page, or alternatively select *Create an Account* beneath the sign in portion of the page.
3) Complete the account details screen 1 of 2 and select *Continue.*
4) Complete the account details screen 2 of 2 and select *Submit.* Note the differences between the account type are noted below.
5) Once you've successfully created your account, select the *Sign In* button to continue.

Contact Type	
Type	**Description**
Individual	Select Individual if you are not an organization (I.e., homeowner)
Organization	Select Organization if you would like to create a central account for your organization or business (I.e., builder, developer)

Note: both individuals and organizations functionally behave the same in Pronto. Both types enable the use of delegate accounts if required. For more information on delegate accounts, refer to the *Account Management* section of this document.

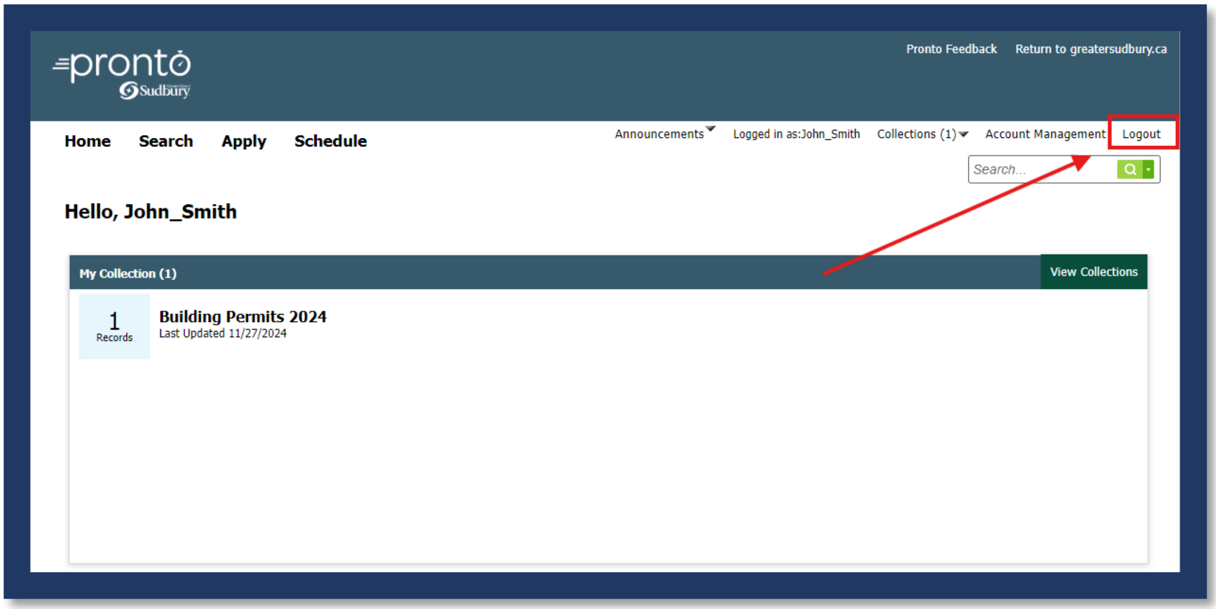
Logging into Pronto



TO LOG IN:

1) Using the latest version of your Google Chrome, Firefox, or Microsoft Edge web browser, navigate to the City's Pronto portal.
2) Enter your username and password.
3) Select the *Sign In* button.

Logging out of Pronto

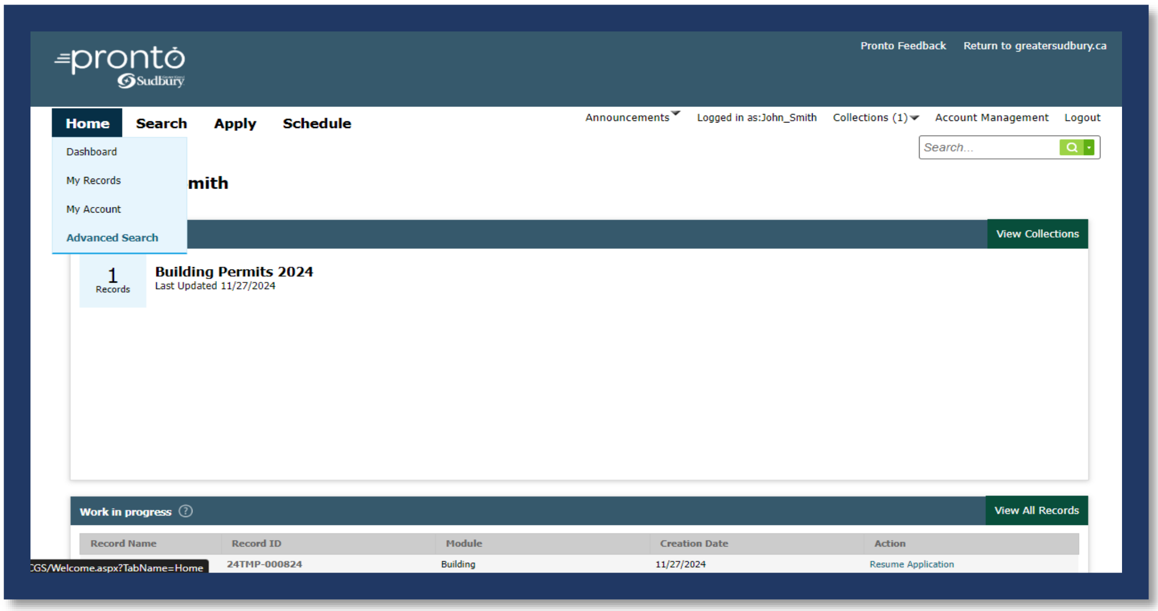


TO LOG OUT:

1) Select the Logout button on the home page in the upper right corner.

Basic Navigation Controls

Once you have logged into your Pronto account, you will be directed to the home page or *Dashboard*. The Dashboard is the starting point for all actions to be completed in the Pronto platform. The Main Menu Bar (top of the screen), will always be accessible allowing the applicant to create, find, and manage all records and associated content.



Features of the Home Page and Tab	
Button Name	**Description**
Dashboard	Opens the dashboard options such as *My Collections* or *Work in Progress.*
My Records	Opens the active or completed permit records that were created by the applicant.
My Account	Redirects to the Account Management section of Pronto. Opens the applicant's account information to modify account details, create re-usable contacts, or manage delegates.
Advanced Search	Search for key words related to a record such as Property Information, Record Information, Licensed Professional, etc.
My Collections	Submitted permits can be added to user created groups known as collections. When a collection is created, it will show up in this section of the home page.
Work In Progress	Permits that have recently been saved and not yet submitted can be viewed and accessed here.

Features of the Main Menu Bar	
Button Name	**Description**
Apply	Opens a drop-down menu for online submission of available development applications.
Search Applications	Search for key words related to a record such as Property Information, Record Information, Licensed Professional, etc.

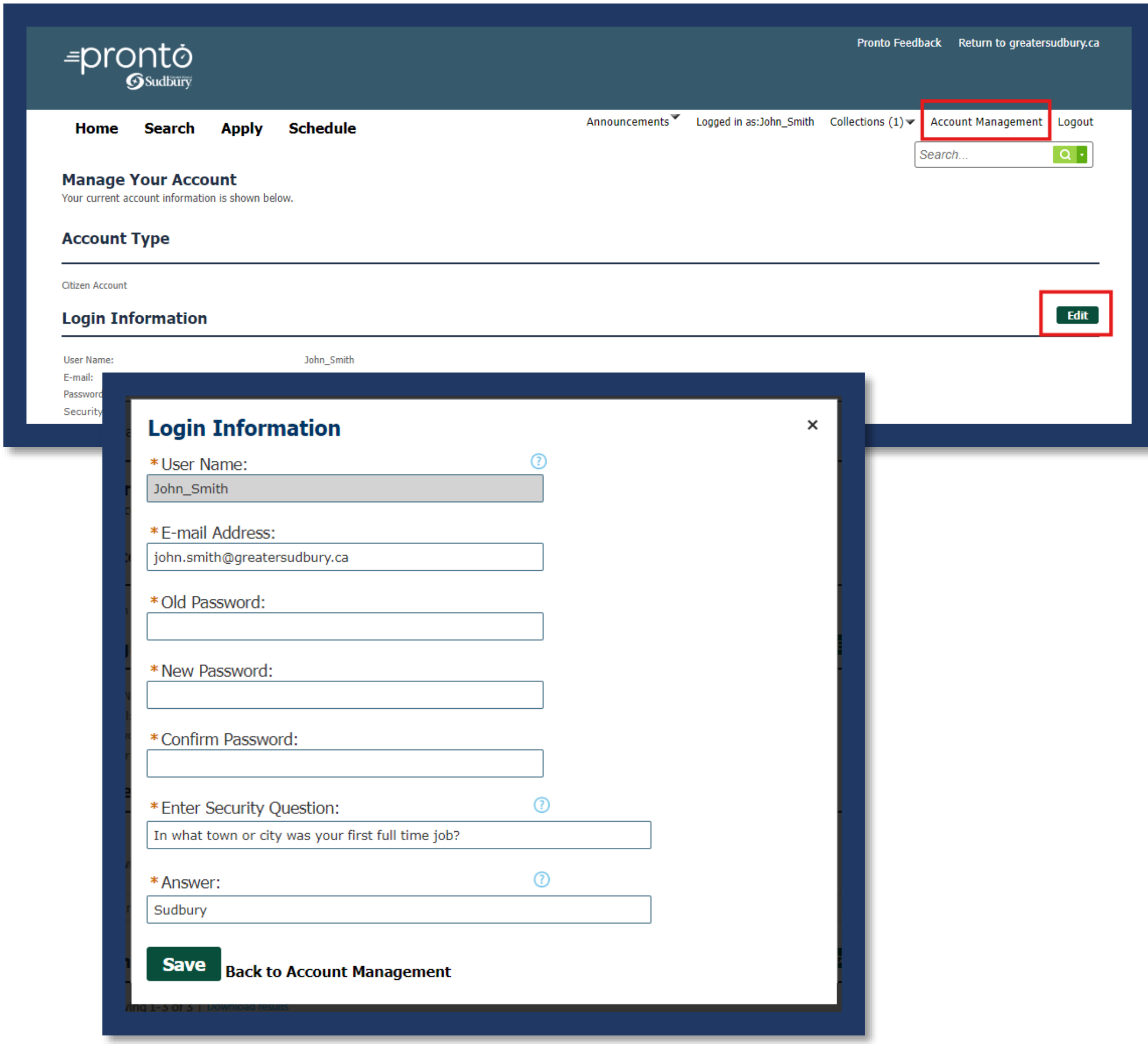
Account Management

The Account Management section of Pronto allows for:

- Updating of information associated to the account, such as the user's password.
- The ability to create re-usable contacts that can be selected when creating an application in Pronto.
- The ability to delegate submission on behalf of the logged in Pronto account to another Pronto account.

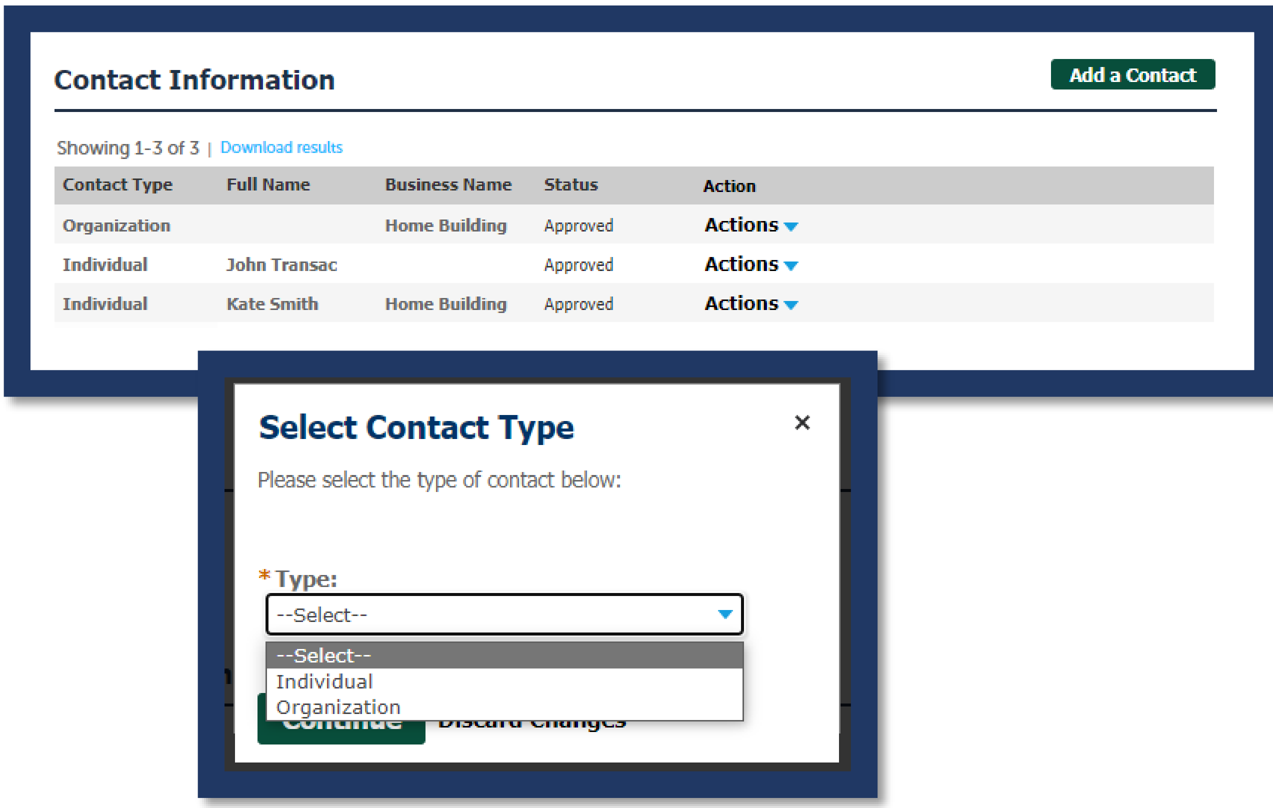
Updating your Pronto Account Email and Password

1) Select *Account Management* from the top left of the page.
2) Beside the *Login Information* header, select the *Edit* button.
3) Update your account information and select the *Save* button to accept changes.



Creating Re-usable Contacts

1) Select *Account Management* from the top left of the page.
2) Scroll down the to the *Contact Information* section.
3) Select *Add a Contact* to create a re-usable contact, selectable when creating applications in Pronto.
4) Select *Individual* as the contact type when prompted, followed by *Continue.*
5) To modify or remove a re-usable contact, select the *Actions* menu beside a created contact.



Note: when using a re-usable contact on an application submission, you will be asked to determine the relevance for that specific application (owner, applicant etc.). For more information on selecting a re-usable contact when applying for an application, please refer to the *Apply for an Application* section of this document.

Delegating Access to your Pronto Account

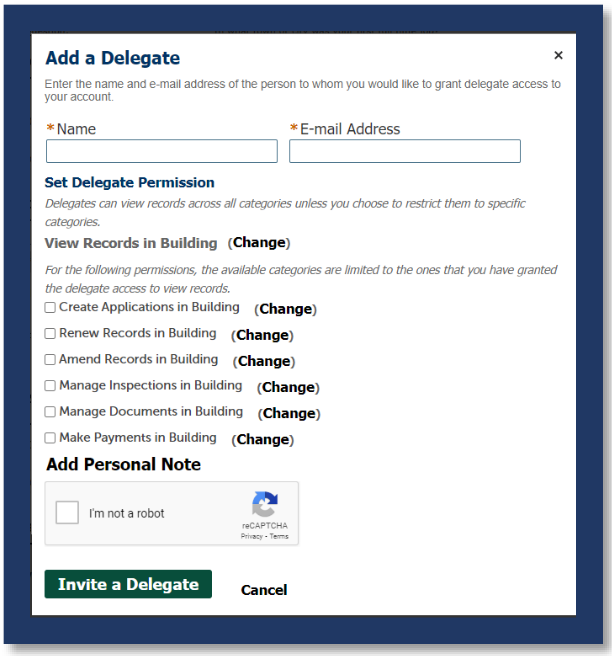
Pronto enables the ability for any account to delegate access to another Pronto account, allowing that account to submit or manage applications on their behalf.

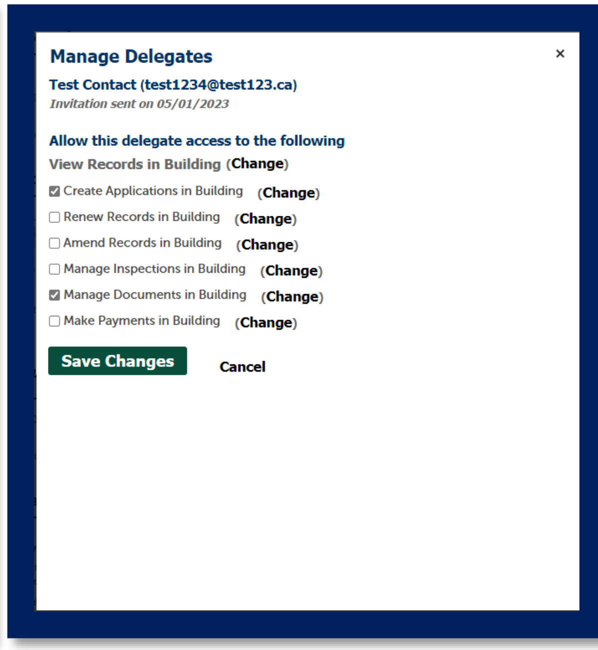
Scenario

Account A adds Account B as a delegate for submitting and managing permit applications. As a result, Account B will see the option to submit as themselves or as Account A next time they create a new application in Pronto.

To add or manage a delegate account:

1) Select *Account Management* from the top left of the page.
2) Scroll down to the *Delegates* section.
3) To add a Delegate account, select *Add a Delegate.*
4) Type the name and email of the Pronto account you wish to delegate access to. Please note that the email you are delegating to must exist as an Account in Pronto already. If they do not, the delegate will need to register an account in Pronto.
5) Next, select the permissions for the delegate account. Please note that the options for renew, amending and making payments on an application will not be recognized by the system as they are not yet supported at this time.
6) Select the *Invite* button to complete the delegation request.
7) To update or remove permissions on an existing delegate, select the *View Invitation* button to the right of their name to make Changes. Select *Save Changes* to apply these changes.

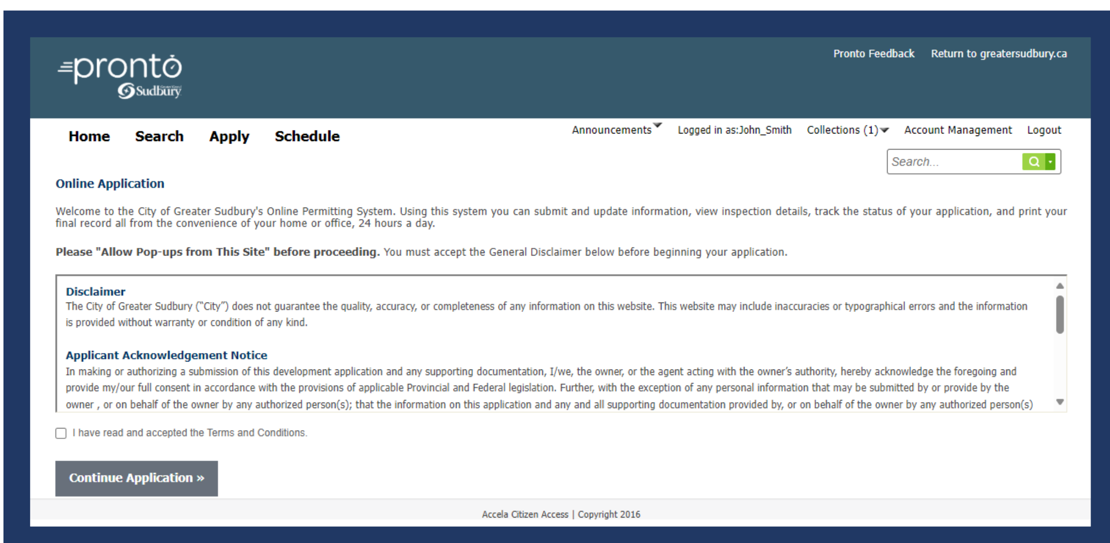




Applying for an Application

Applying for an Application in Pronto

1) Select "Apply" from the top menu.
2) Read the *Disclaimer, Applicant Acknowledgement Notice*, and the *Notice of Collection*.
3) Checkoff the box beside "*I have read and accepted the Terms and Conditions".*
4) Select the *Continue Application* button

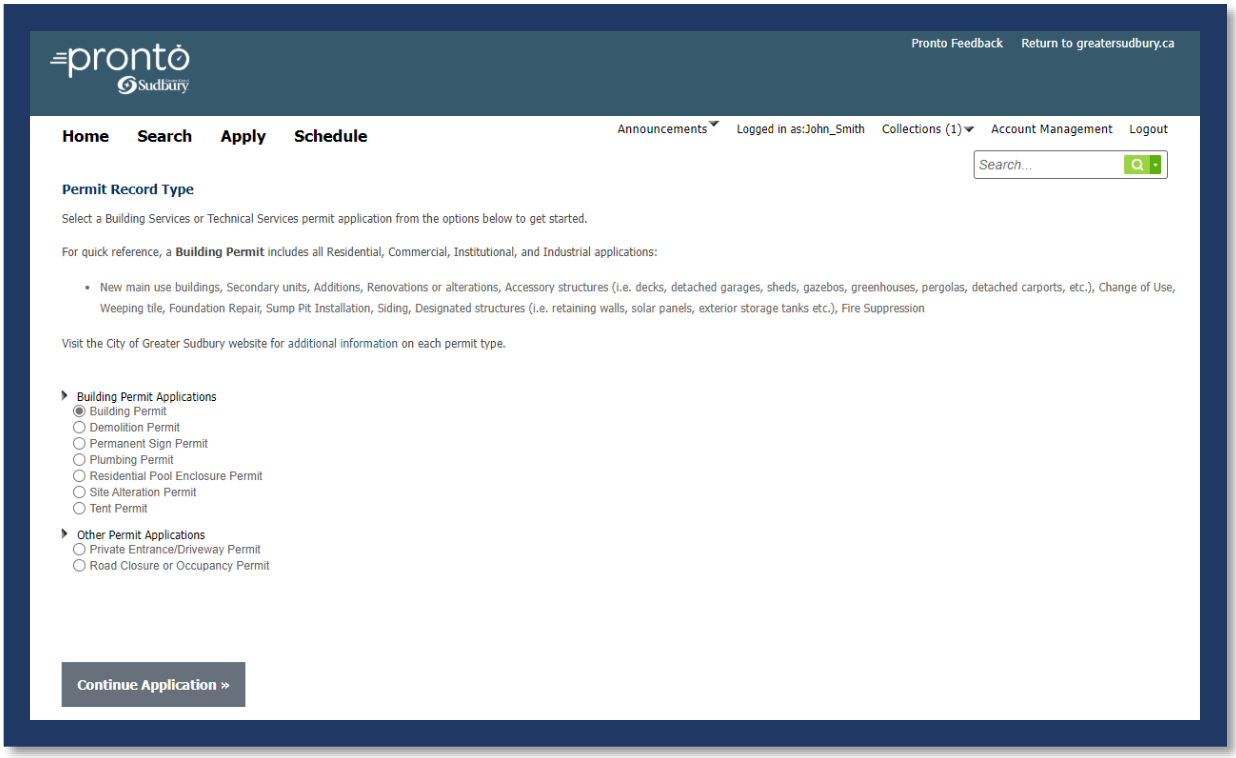


Application Types

Based on the option chosen in the Apply menu, a page of all available application types currently supported in Pronto will be displayed.

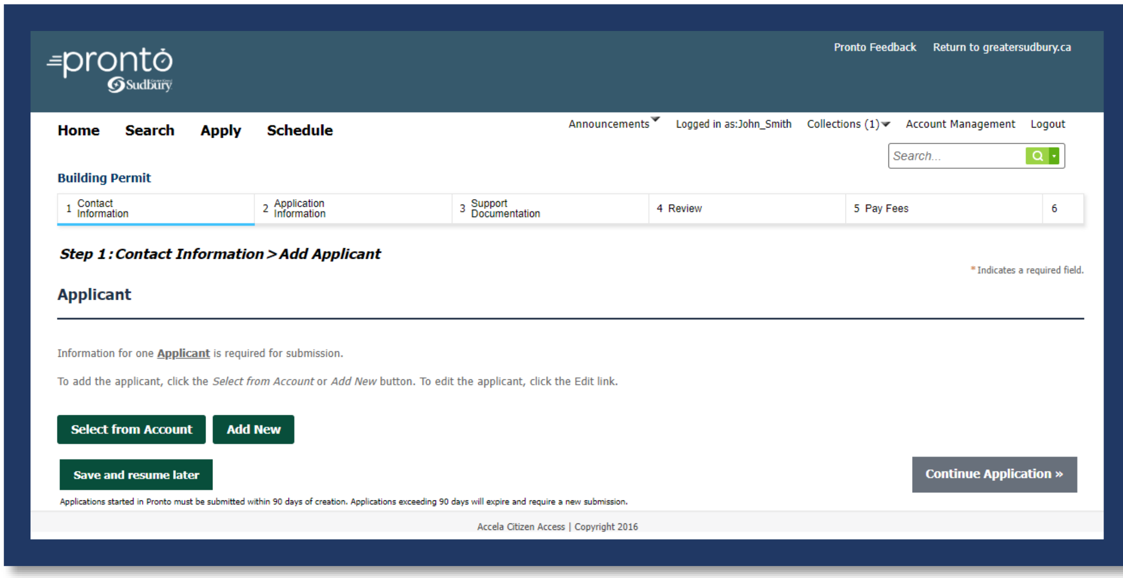
Note: for more information on which applications are available via Pronto, including the definition for each, please refer to the City of Greater Sudbury's [Building Services] and [Planning Services] websites.

1) Select the type of application or permit you wish to apply for.
2) Select the *Continue Application* button.

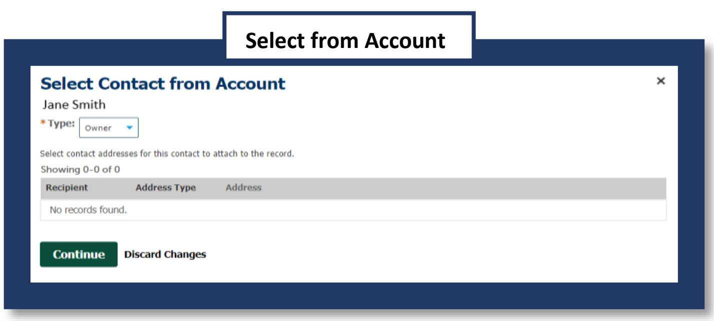


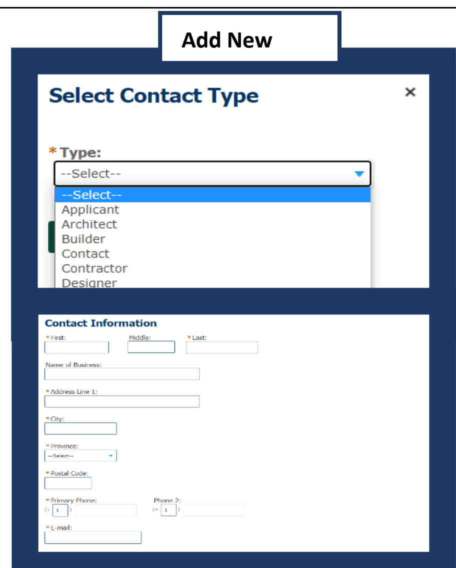
Step 1: Contact Information>Add Contact

1) Select the *Select from Account* button or *Add New* button.
2) Two types of contacts are required for most applications:
    a. *Applicant*
    b. *Owner*
3) Select the *Continue Application* button or the *Save and resume later* button.



Features of the Contact Information Page	
Button Name	**Description**
Select from Account	Opens a pop-up window where the applicant can select any re-usable contacts created under the Contacts section on the *Account Management* page. For more information on creating re-usable contacts, please refer to the *Account Management* section of this document.
Add New	Opens a pop-up window where the applicant can create a new contact specific to the application.



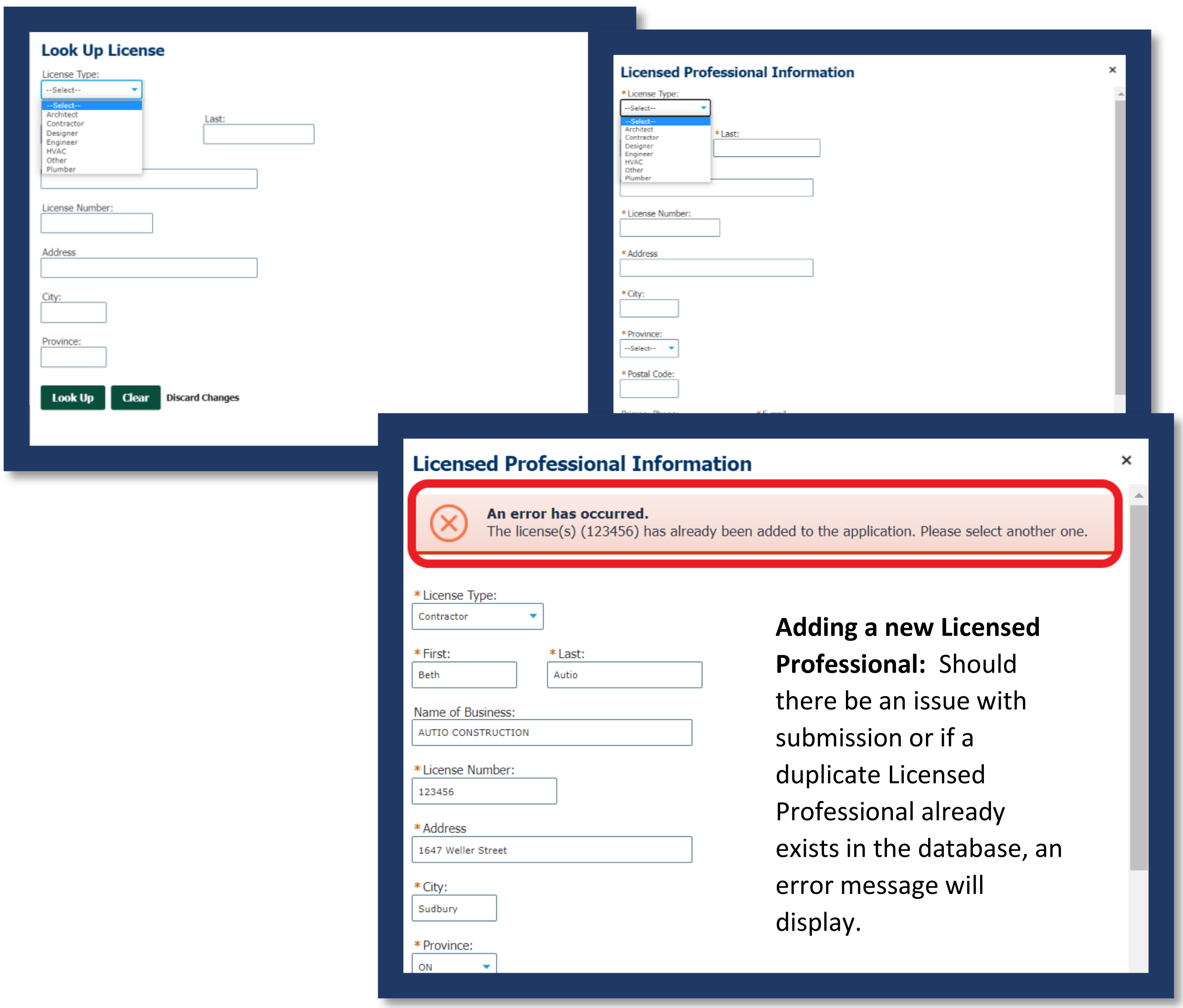


Step 1: Contact Information>Licensed Professional

To add a new Licensed Professional, select the *Add New Licensed Professional* button. To find a Licensed Professional that may already exist in the City's database, select the *Look Up* button.

Note: in most scenarios a licensed professional is <u>not required</u> to proceed with the application. This information will be included on the Licensed Professional screen.

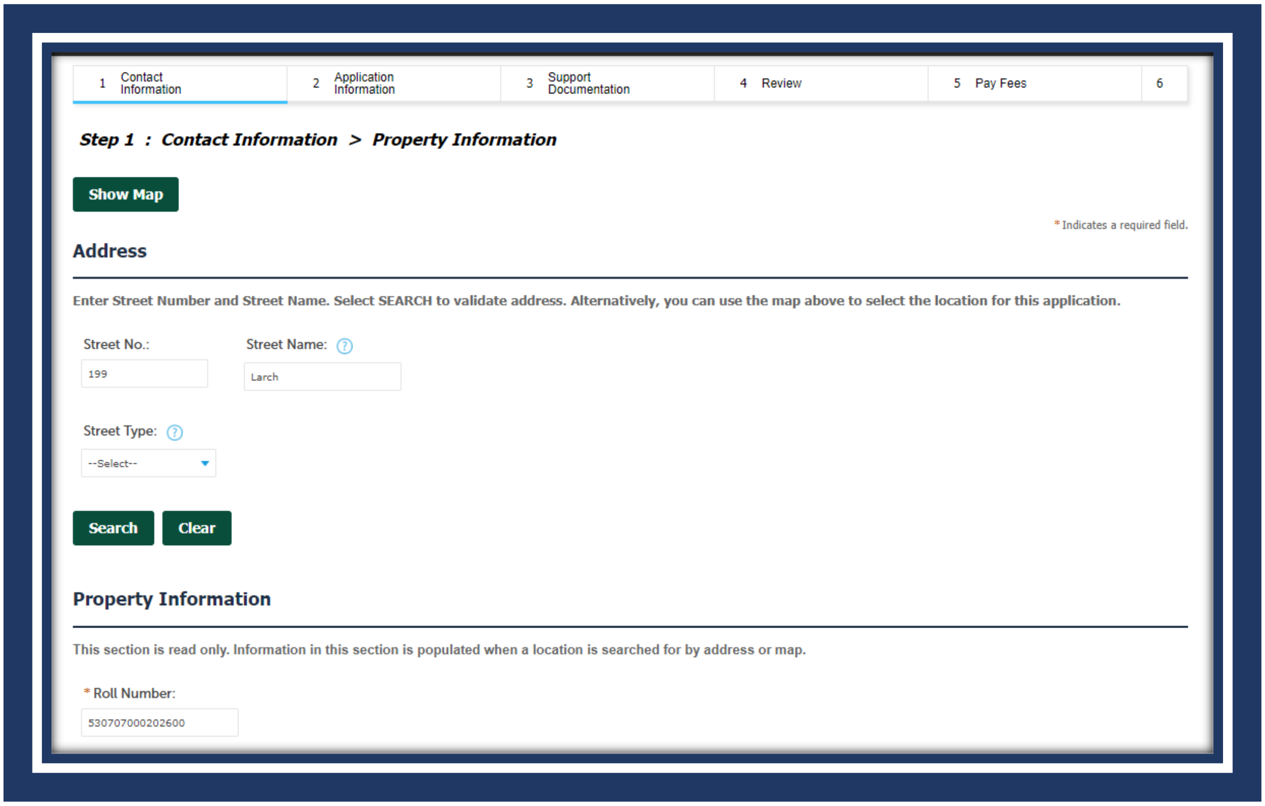
Prior to adding a new Licensed Professional, ensure to search the database first to verify that the Licensed Professional profile is not already available. This will save time versus entering the Licensed Professional information manually.



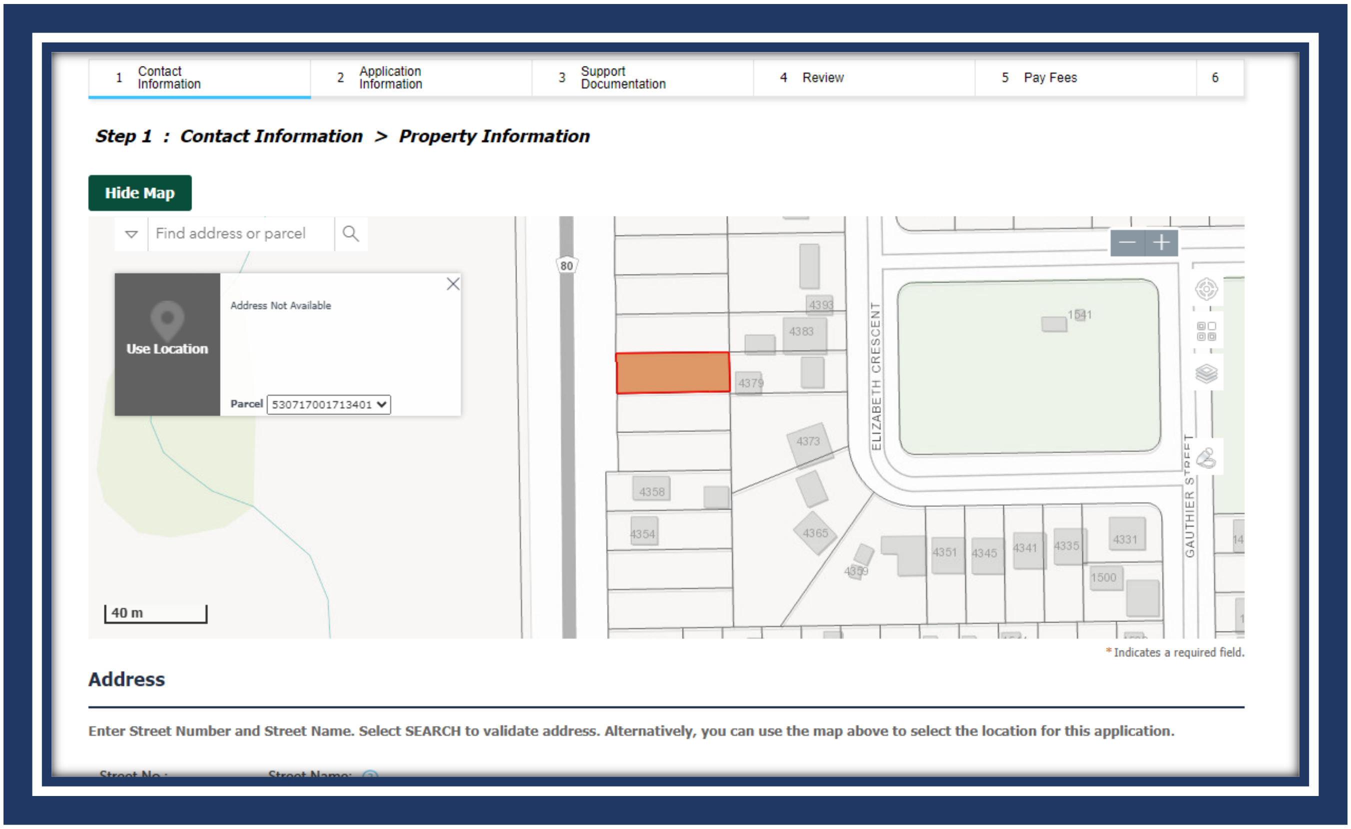
Step 1: Contact Information>Property Information

There are two primary methods for selection the location of work that applies to the application:

1) In the *Street Number* and *Street Name* fields, input the address number and street name then select *Search*. Note: do not include the street type (i.e. boulevard, court) for better search results.



2) Select the *Show Map* button to select a parcel of land then select *Use Location*. This option is useful in scenarios where an existing address may not yet exist.



In either scenario chosen above:

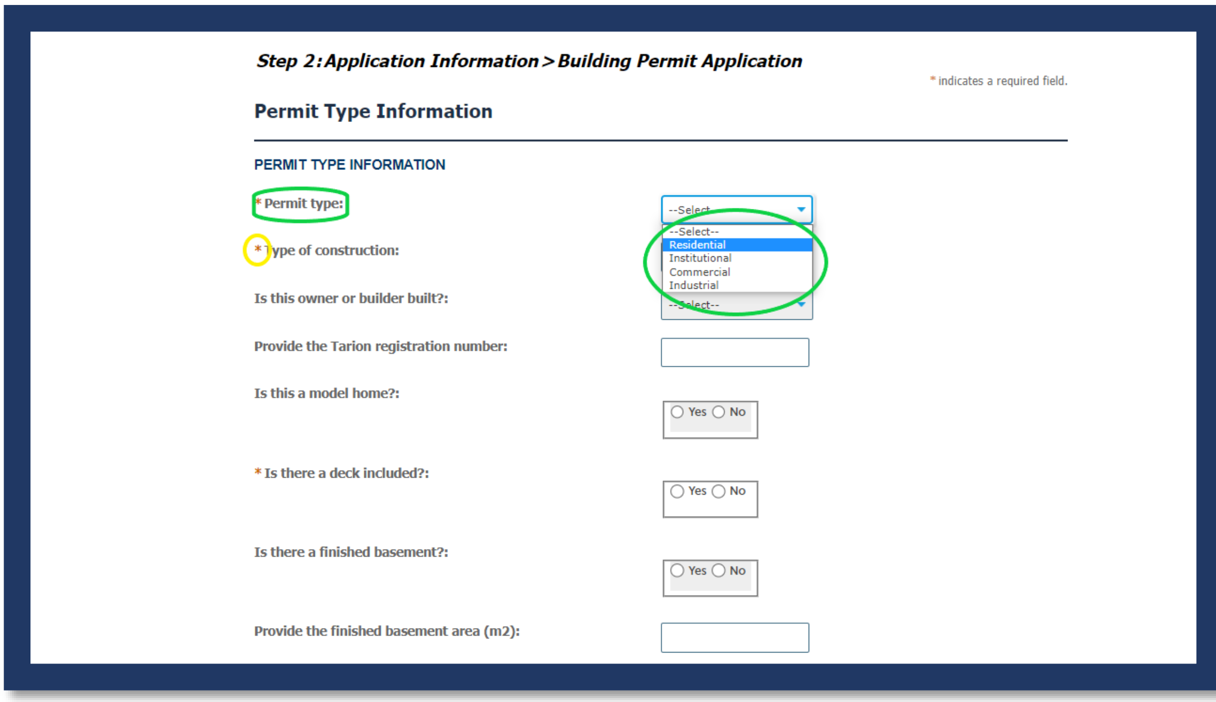
3) If the address exists, the property information will populate in the applicable fields:
    a. Street number
    b. Street name
    c. Street type
    d. Roll number information
4) Select the *Continue Application* button to proceed with the application questions or the *Save and resume later* button to save a draft of the application in its current state for later completion.

Step 2: Application Information

There are several sections to *Step 2: Application Information* dependent on the application being applied for. In general, most applications follow a similar structure of asking for Building Code or Planning Act mandated questions.

The applicant is to complete **required fields** marked with a red asterix (*). As required (*) fields are answered, additional required (*) fields may populate depending on responses to the primary questions.

Note: For building permit applications where applicable, the *Permit Type* drop-down list reflects 4 permit type options (Residential, Commercial, Institutional, and Industrial). The applicant is to be aware that the Permit Type drop-down list is not related to zoning, but rather, the **proposed main use.**



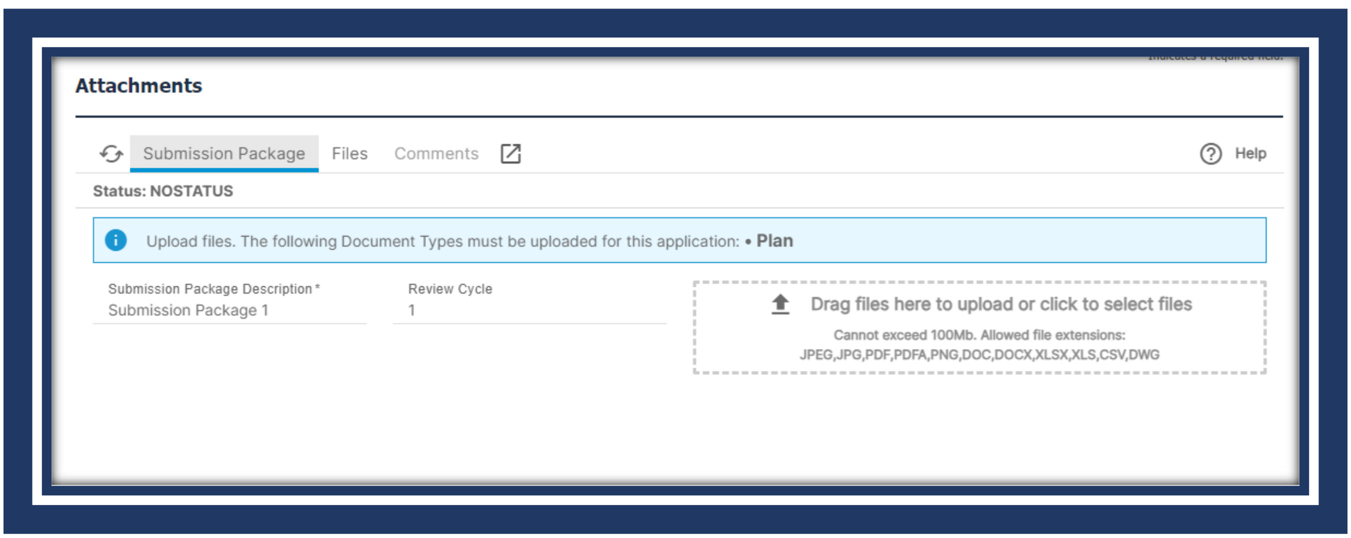
Step 3: Support Documentation>Support Documentation:

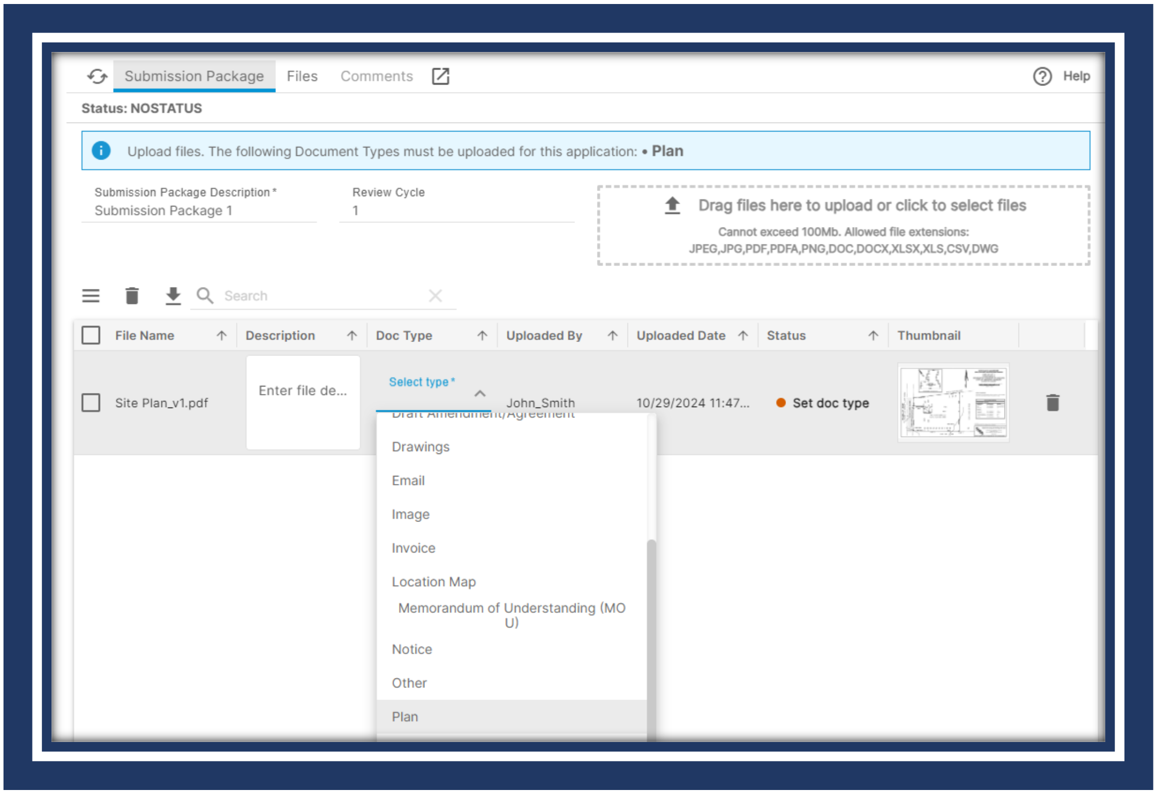
Uploading Documents in Pronto

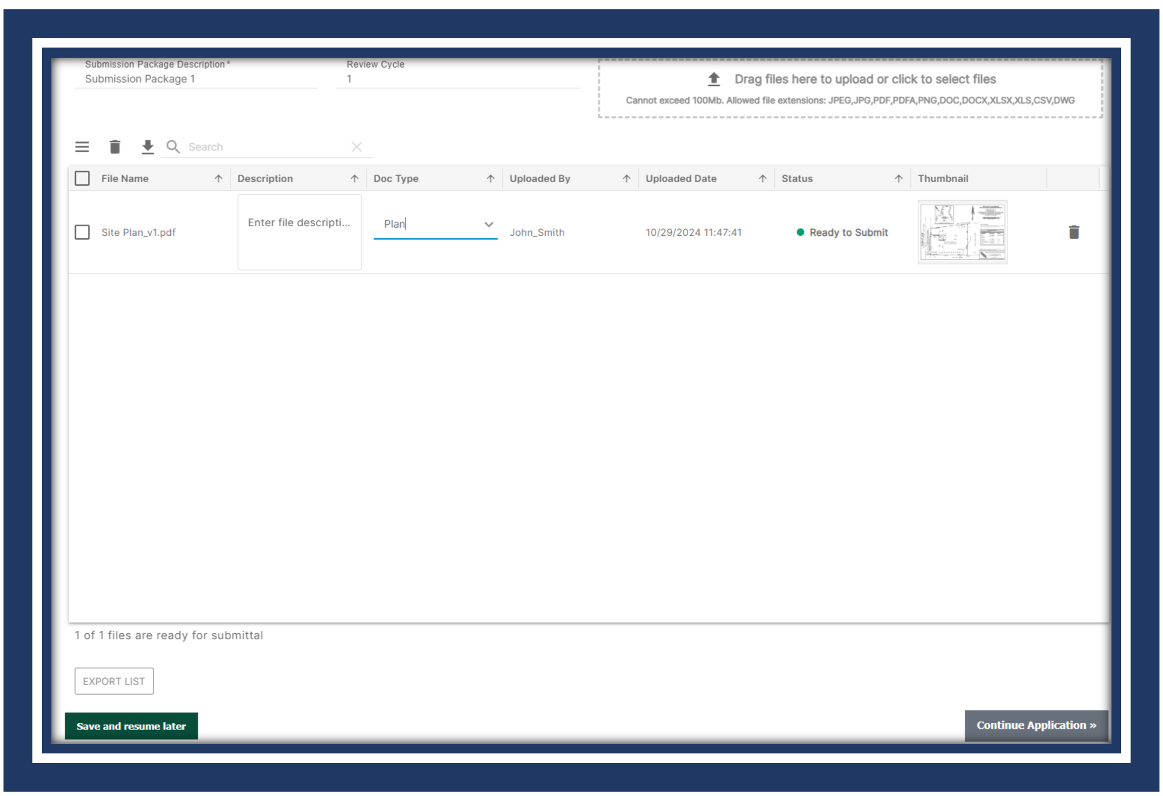
For most applications, support documentation will be required prior to submission of the application. Pronto is currently undergoing changes to the support documentation section, and some applications are now using a modern interface for document upload. The below sections include instructions for uploading documents for both the modern interface as well as the classic interface.

Modern Document Interface

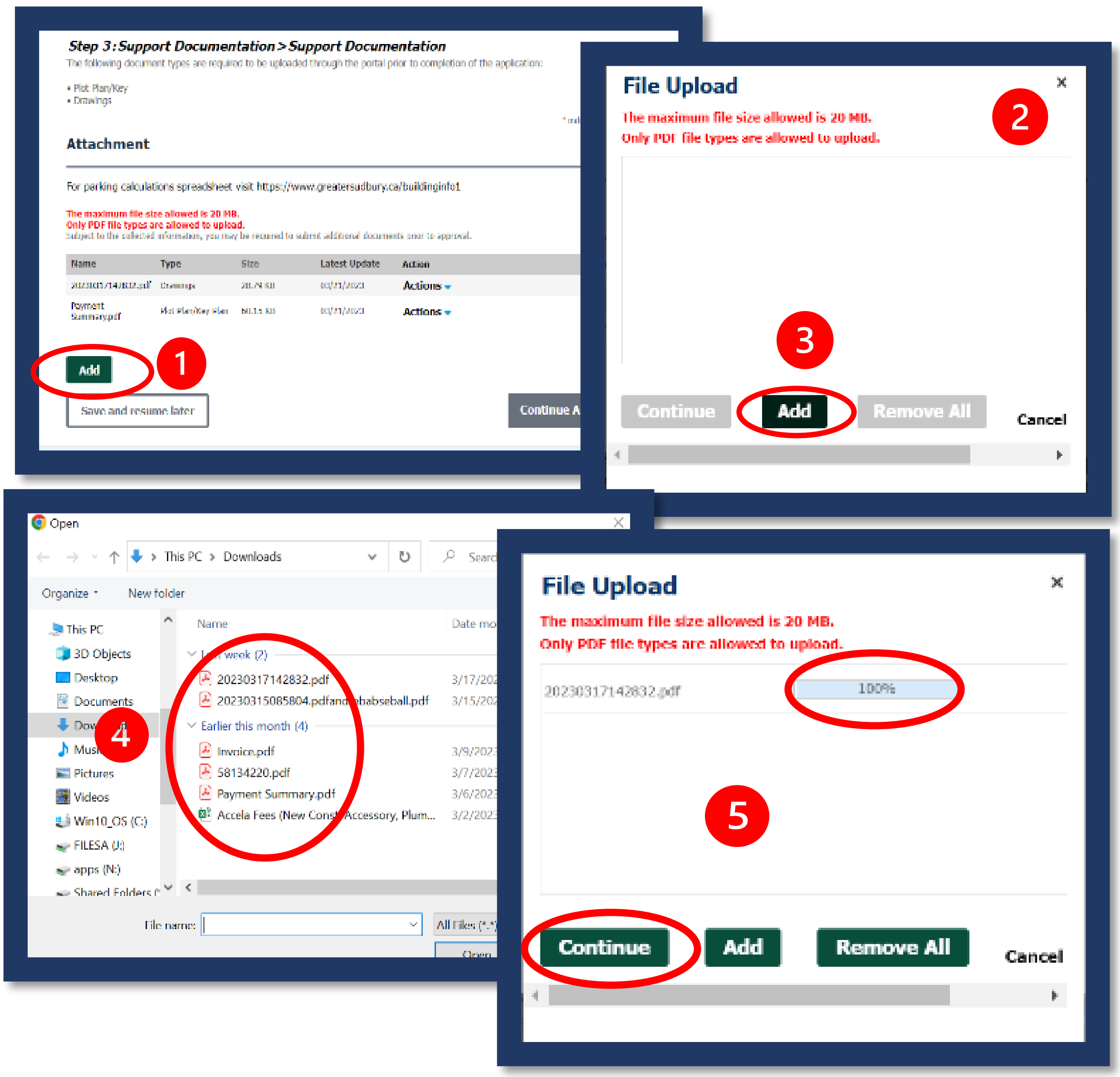
1) Under the Submission Package tab, use the “Drag files here to upload or click to select files” section to add files. This section will also note the accepted file formats. In most cases a PDF is preferred unless otherwise stated.
2) Files will be added to the list based on the action chosen above.
3) Added documents will undergo an upload and anti-virus check. The status of the file can be viewed under the *Status* column.
4) Upon upload of a file, select the file ‘Doc Type’. Note: The Support Documentation screen for any application will specify the types required to proceed with submission of the application.
5) Select the *Continue Application* or *Save and resume later* button.




Submission Package
Files
Comments
Help
Status: NOSTATUS
Upload files. The following Document Types must be uploaded for this application: • Plan
Submission Package Description *
Submission Package 1
Review Cycle
1
Drag files here to upload or click to select files
Cannot exceed 100Mb. Allowed file extensions: JPEG,JPG,PDF,PDFA,PNG,DOC,DOCX,XLSX,XLS,CSV,DWG
Search
File Name
Description
Doc Type
Uploaded By
Uploaded Date
Status
Thumbnail
Site Plan_v1.pdf
Enter file de...
Select type *
John_Smith
10/29/2024 11:47...
Set doc type
Drawings
Email
Image
Invoice
Location Map
Memorandum of Understanding (MOU)
Notice
Other
Plan


Submission Package Description *
Submission Package 1
Review Cycle
1
Drag files here to upload or click to select files
Cannot exceed 100Mb. Allowed file extensions: JPEG,JPG,PDF,PDFA,PNG,DOC,DOCX,XLSX,XLS,CSV,DWG
Search
File Name
Description
Doc Type
Uploaded By
Uploaded Date
Status
Thumbnail
Site Plan_v1.pdf
Enter file descripti...
Plan
John_Smith
10/29/2024 11:47:41
Ready to Submit
1 of 1 files are ready for submittal
EXPORT LIST
Save and resume later
Continue Application »

1) Select the *Add* button.
2) A pop-up window will populate.
3) Select the *Add* button in the pop-up window.
4) A pop-up window will display. Choose the file to be uploaded (at this point the applicant can select as many documents as required).
5) Wait until the documents are at 100% uploaded, then select the *Continue* button.



6) Select the *Type* of document (i.e. Drawings).
7) Provide a brief description of the document in the *Description* text box (i.e. Structural Drawings).
8) Select the *Save* button.
9) Select the *Continue Application* or *Save and resume later* button.

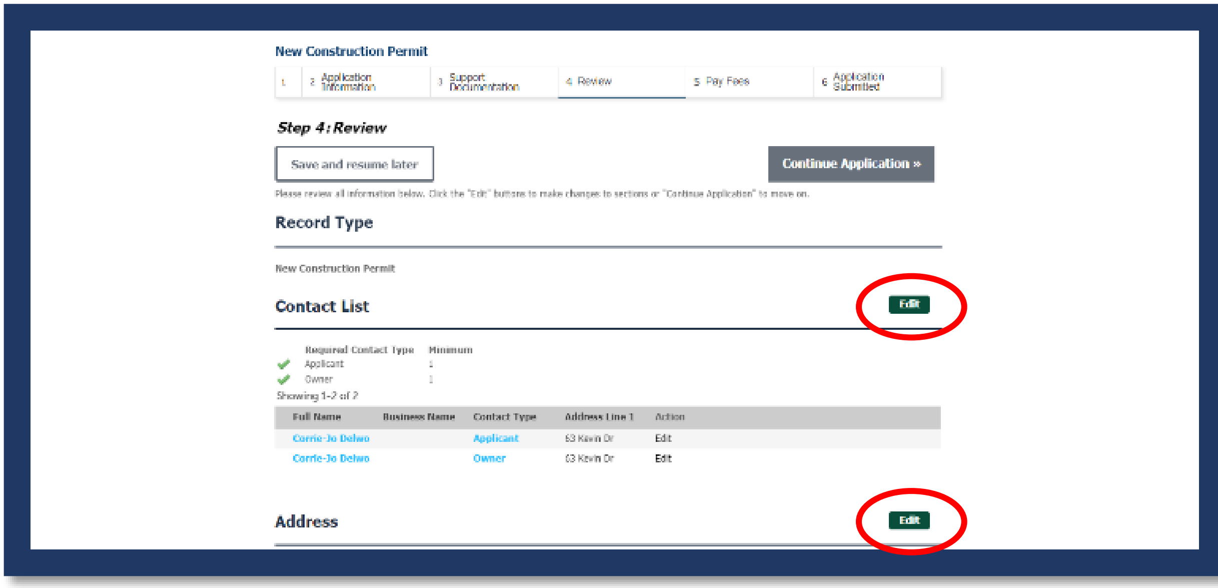
For most applications, certain documents are required when applying. This information is provided to you under the *Support Documentation* header. Upon review of your application, the system will notify you if you are missing the minimum required documents to submit the application.

The maximum file size allowed in Pronto is 100 MB and documents should be in PDF format unless otherwise stated.

Note: you can upload additional documentation against an application after submitting via Pronto. Please refer to the *Reviewing Attachments of a Permit Application* section of this document for more information.

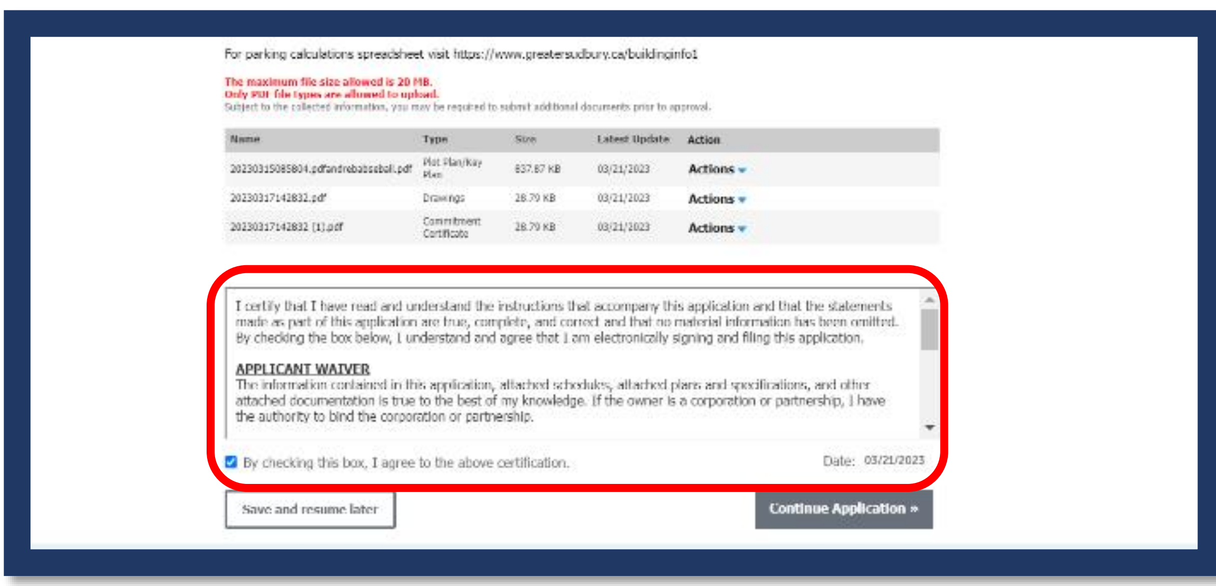
Step 4: Review

The *Review* page allows the applicant to review and edit the information entered prior to submission of the application. Selecting the *Edit* button allows the applicant to make changes to each section of the application.



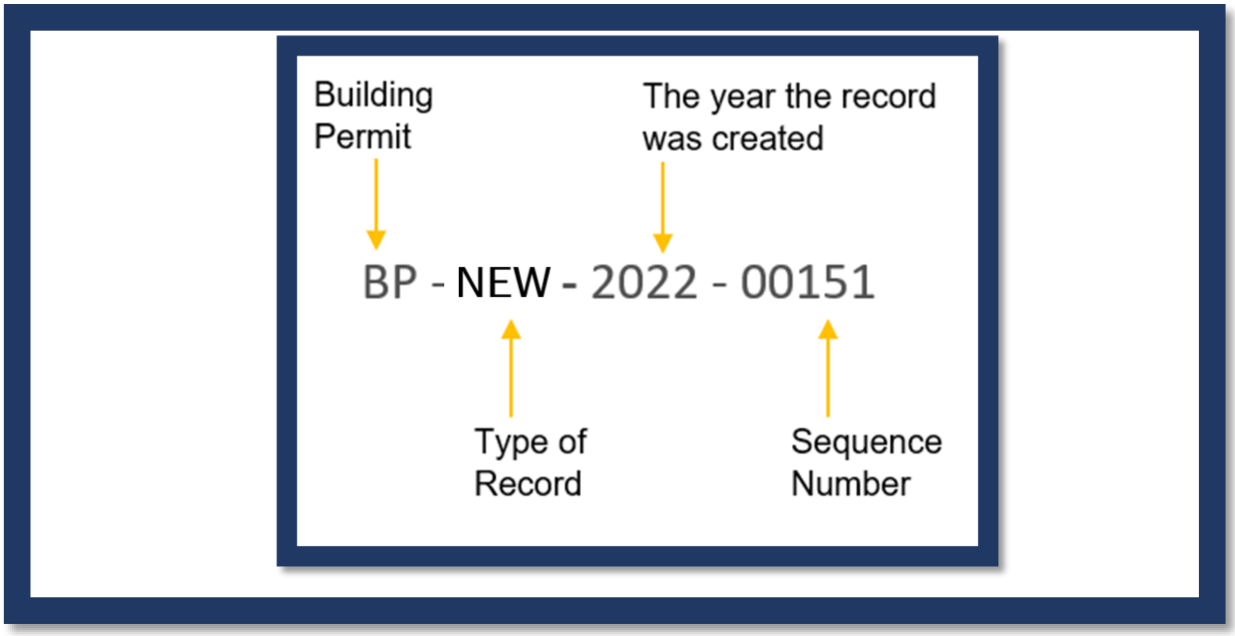
Before selecting Continue Application button, the applicant is required to:

1) Read the *Certification, Applicant Waiver,* and the *Completeness Compliance*.
2) Checkoff the box beside "*By checking this box, I agree to the above certification".*
3) Select the *Continue Application* or *Save and resume later* button.
4) Selecting the *Continue Application* button provides the applicant with a *Record Number* (application number):



Record (Application) Numbers

A record number will include the type of record, the year the record was created and the sequence number for that year. An example of a Building Permit record number is:



A record number is generated by Pronto based on the Record Type selected at the time of record creation.

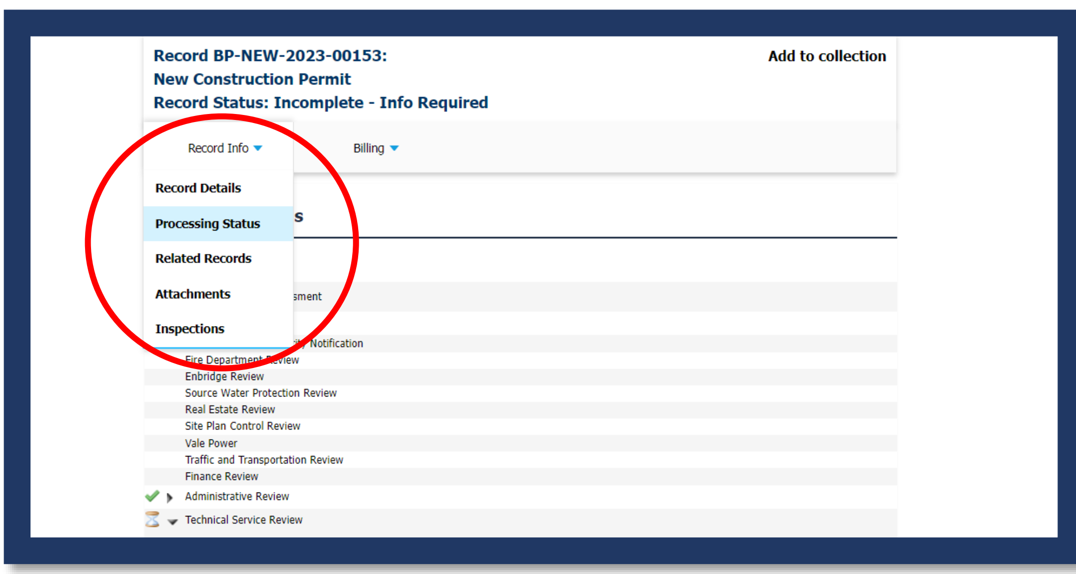
Record (Application) Status

Reviewing the Status of an Application

Once an application has been submitted via the Pronto portal, City of Greater Sudbury staff will start reviewing the application. The applicant will be notified by email if there are any missing documents required to proceed with circulation and eventual approval of the application or permit.

Through the Pronto portal, the applicant can review the status of their application, download and upload documents, and schedule inspections if required. Note: Pronto does not support online payment through the portal currently.

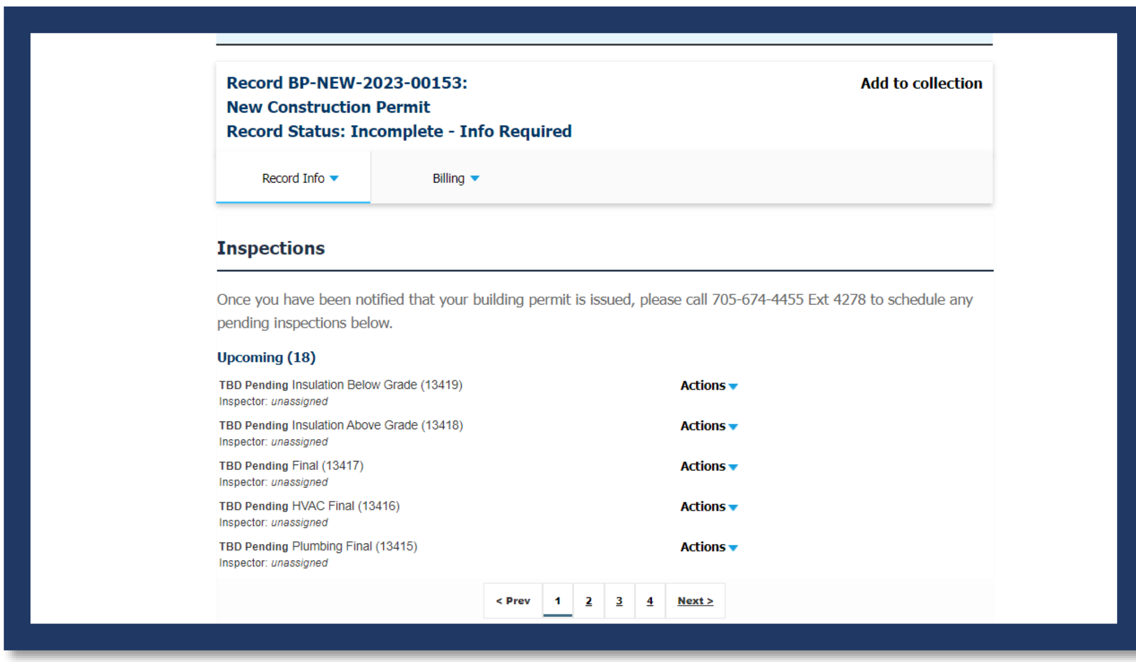
1) Select *My Records* from the Home Page.
2) Select the *Record Number* (application number) to view details of the application.
3) Select the *Record Info* tab to view information available to you on the record.
4) A drop-down menu will populate with a list of choices:
    a. Record Details
    b. Processing Status
    c. Related Records
    d. Attachments (Note: if the application type is using the modern document interface, look for the Project Files tab beside the Billing tab)
    e. Inspections
5) Select on *Processing Status.*



Reviewing Application Inspections

Note: Inspections do not apply to all applications. A notification will be sent to applicants if/when inspections can be scheduled through the Portal (i.e. on issuance of a building permit application once the work is complete).

1) Select *My Records* from the Home Page.
2) Select *Record Number* (application permit number).
3) Select the *Record Info* tab to view information available to you on the record.
4) Select *Inspections. A* list of Inspections will populate. Once the applicant is notified, pending inspections can be scheduled on this page through the portal.
5) To view any details of an Inspection, select *Actions*, a pop-up window will open. Select *Schedule* to schedule an inspection or *View Details* to view more information.



Reviewing Application Documents/Uploading Documents Post-Submission

1) Select *My Records* from the Home tab.
2) Select *Record Number* (application number)

If the application is using the modern document interface:

3) Select the *Project Files* tab.

If the Project Files tab is not available:

4) Select the *Record Info* tab followed by the *Attachments* option in the drop-down menu.

Regardless of the options above:

5) Any documents uploaded by City staff or the applicant, can be found in this location (i.e. emails, letters, permits, inspection notices, etc.)
6) The applicant can also upload additional documents for the application if requested using the process(es) identified in the *Uploading Documents in Pronto* section of this document.