EXTERNAL REVIEWER USER GUIDE
Prepared by: Planning, building & licensing services
City of Kingston

Assumptions:
• You have a working knowledge of a Windows-based personal computer
• You are familiar with Kingston’s planning and development process
• You have Internet access to DASH

Goals:
You will:
• be introduced to the Citizen Access DASH interface
• become familiar with basic navigation of the Citizen Access DASH interface
• learn how to register and login to an account
• learn how to lookup property information
• learn how to search development applications
• learn how to respond to a technical circulation
• learn how to use GIS in Citizen Access
• learn how to create a record collection

Introduction
This guide offers external technical reviewers an overview of the navigation tools, functions and terms of the DASH Citizen Access platform. You will explore the various windows (portlets), main links, drop-down menus, toolbars and learn how to provide a response to technical circulations from the City’s planning division.

Citizen Access is the public portal to the DASH system. The Citizen Access portal is designed to provide 24/7 access to the City of Kingston’s development services and information affecting our community. The DASH Citizen Access portal is one of the many City initiatives being implemented to improve efficiency and offer convenience and transparency to the municipality’s development processes.
Getting started

a) You can access the DASH Citizen Access portal via a link from the City’s website – CityofKingston.ca/DASH – or by entering the online address into your web browser. The DASH Citizen Access is supported by all major Internet browsers such as Explorer, Safari and Mozilla. The main page shows the following information:

b) From the main page, you have the option to select the following:
   - a property from the General Information column;
   - search a specific development application in the Planning column;
   - log in to your account; and
   - register for a free account.

Note:
The Citizen Access portal includes a check box for ‘Accessibility Support’ in the top right corner of the homepage. Select this option to highlight field location and hyperlinks when the cursor is cast over them.
How to register for an account

a) To register, select one of the ‘Register for an Account’ hyperlinks in the top right corner.

b) Read the disclaimer in its entirety. After reading the disclaimer, if you wish to proceed with the registration process, check the acceptance box and click on ‘Continue Registration’.
c) Complete the fields for login information.

![Account Registration Step 2: Enter/Confirm Your Account Information](image)

- User Name:
- E-mail Address: joe@cityofkingston.ca
- Password: ********
- Type Password Again:
- Enter Security Question:
- Answer:

**Contact Information**

You are required to fill out contact information in order to create an account. This information is used by the City to contact you if needed. It is important that if your information changes, that you update your account information to ensure that our information is up to date. Be sure to specify this preferred method of contact.

![Add New](image)

Enter the words below:

![Display CLOSE](image)

Continue Registration »

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d) Select the ‘Contact Type’ that describes your role. You have a choice between ‘individual’ (if you are using DASH for yourself) and ‘organization’ (if you are using DASH on behalf of your company or organization).
e) Complete the fields for contact information.

f) Copy the words or numbers from the photograph provided into the field and select ‘Continue Registration’.
g) Once you are finished, the DASH system will register the information provided and verify the registration of the account.

CONGRATULATIONS!!
Logging in to your DASH Citizen Access account

a) Return to the Citizen Access homepage and enter your username or email address and password. Select ‘Login’.

Welcome page

If you have logged in as a registered user, your homepage includes the following options:

- ‘Create an Application’;
- access your account information;
- review your applications;
- read announcements;
- create and view collections; and
- use the Dashboard.
Lookup property information

a) In the ‘Home’ tab window select ‘Advanced Search’ in the menu bar. Click on ‘Lookup General Property Information.’

b) Fill in the address fields and select ‘Search’. You can also search properties by parcel number and record information by selecting the drop-down menu in the title bar (highlighted in the upper right on the screen-shot on the next page).
c) Select the address result by double clicking on the address line. Alternatively, you can check the box in front of the address and click on the ‘Show on Map’ button.

d) Clicking on the ‘Download results’ link will generate a comma-separated values (CSV) file. This file can be opened and used in spreadsheet software.
e) Address details will be displayed. Additional information can be obtained by double clicking on the parcel number (see graphic below).
Searching development applications

Development applications can be searched by both registered and unregistered users in the DASH Citizen Access portal.

The development applications displayed in this document were generated for training purposes only and are not active applications being processed by the City of Kingston.

a) Select ‘Search Development Applications’ in the Planning column on the Welcome Page. Alternatively, you can select the Planning tab and click on ‘Search for Development Applications’ at the top of the screen to access the search fields.

b) Fill in the address fields and select ‘Search’. You can also search by ‘Parcel Number’ and ‘Record Information’ using the drop-down menu in the title bar.
c) Select the address result by double clicking on the address line. The list of applications related to the subject property will be displayed below.
d) Choose an application type and click on the record number. The page will be displayed as follows:
e) To view additional information about the development application, click in ‘Record Info’ to obtain a drop-down list to access the following additional information:

- record details;
- processing status;
- supporting information;
- related records; and
- inspections.

f) These drop-down windows:
- show where the application is in the review process;
- allow you to obtain or view copies of notices;
- show reports and plans uploaded to the record; and
- show other applications, related to the subject application, that are being processed concurrently.
Dashboard
The Dashboard is a new feature in the DASH Citizen Access portal. It helps the user manage and follow files that may be of interest. The portlet is composed of two parts. First is the ‘Collections’ window. Records, or groups of records, can be easily accessed in DASH by creating a Collections folder.

1) Click ‘View Collections’ to view and access the user’s collection folders.
2) Click on ‘View All Records’ to view and access the user’s records.
Conducting an external review

a) Log in to your DASH Citizen Access Account

b) Select the Planning tab from the Citizen Access main page.
Welcome to DASH! – Jason Budd
You are now logged in.

What would you like to do today?
To submit a development application, click on "Create an Application" below to get started.
To manage your existing applications, switch to the Planning tab to see a list your recent activity.
Otherwise, select one of the options below:

General Information
Lookup General Property Information

Planning
Create an Application
Search for Development Applications
c) The records associated with your account will be visible on the Citizen Access Planning page. Select the record you want to review and provide comments.

d) Details of the selected record will be displayed in the Citizen Access Record Info drop-down menu and in the More Details drop-down menu located below the GIS Map. Review the content and scroll down to the ‘Supporting Information’ portlet. Expand the portlet and select a file that you would like to review.
**Record Details**

**Applicant:**
Mr. Jason Budd  
City of Kingston  
1211 John Counter Boulevard  
Kingston, ON, K7L 2Z3  
Canada  
Work Phone: 5464291  
AccelaNoReply@mydomain.com

**Project Description:**  
Civic Addressing

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**More Details**
e) The selected file, such as a ‘site plan’, can be saved to a local drive. Using a tool, such as Adobe Pro, you can make comments on the pdf and save it to your computer using a new file name. Preferably, the new file name should include: the original title; the name of the reviewing individual or organization; and the review date (e.g. site plan-external reviewer-Oct 22-15.pdf).

When you are ready to upload the file to the record, select ‘Add’ at the bottom of the Supporting Information portlet.

f) Please note: The file you upload to the record does not have to be a copy of the file downloaded for review. You can also upload a file related to the record, such as a departmental memo, letter or copy of an email.

g) After clicking the ‘Add’ a pop-up window will appear. Select the file reviewed from the local drive to upload it into the record being reviewed in DASH Citizen Access. Click ‘Continue’ to proceed to the next step in the review comment and file upload process. Please note that the maximum file size for uploads is 50 MB.
h) As the external reviewer, you now have an opportunity to provide comments related to the record being reviewed in the comment boxes provided below the description box. Each box allows a maximum of 4,000 characters. If your comments are going to exceed 4,000 characters, then you can upload a memo to the record identifying it as your ‘Plan Review’. (Screen shots are provided on the following pages.)

The file uploaded to the record should have a file name that includes: the title; the reviewing individual or organization; and the review date (e.g. plan review memo-planning dept-Oct 22-15.doc).

Note:
Red asterisks indicate a field that is required to be completed before proceeding.
## Supporting Information

To view documents and plans related to the application, please click on the details below.

The maximum file size allowed is 50 MB.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Size</th>
<th>Latest Update</th>
<th>Upload Date</th>
<th>Action</th>
<th>Record Type and ID</th>
</tr>
</thead>
</table>

**File: Test Plan.pdf**

**Type:**

- Archaeological Report - Stage 1
- Archaeological Report - Stage 2
- Archaeological Report - Stage 3
- Archaeological Report - Stage 4
- Concept Plan
- Control Plan
- Designated Subsurface Review
- Draft RPA
- Draft Rezoning/Condo Plan
- Drawing Binder
- Engineer's Certificate (Enta Plan/Enta All) or Letter (Tree Permit)
- Environmental Compliance Approval
- Environmental Impact Study
- Final Subdivision/Condo Plan
- Floor Plan and Architectural Elevations
- Grading Plan
- Heritage Impact Study
- Hydrogeology Study
- Landscape Plan
- Lighting Plan
- Noise and/or Vibration Study
- Other
- Owner Authorization
- Parking Study
- Phase 1 Environmental Site Assessment Plan
- Phase 2 Environmental Site Assessment Plan
- Plan Review Evaluation...
i) Once the description has been completed and the comments have been provided in their respective fields, you can select ‘Save’ and save the file and comments to the record.
GIS mapping function

Map icons
Select the globe icon on the top right of the address portlet. This initiates the Geographic Information Systems (GIS) function in the Citizen Access portal and displays the parcel you searched. Some basic information is provided, such as parcel number and mailing address. The GIS portlet includes tools for manipulating the map displayed. On the right-hand side of the map are a series of icons that include:

- **Zoom in and out**
  
  ![Zoom in and out icon]
  
  Select this icon to increase or decrease the field of view on the map to include a larger area.

- **Pan**
  
  To pan from the current view, click and hold on the map. Move the cursor in the direction that you want to view. The map will move in the direction of the cursor.

Using the map’s feature tabs

Layers:
The 'Layers' tab permits you to manipulate the information displayed on the GIS Map. You can turn on and off various GIS layers such as: parcels, zoning and orthographic mapping. Choose layers to turn on and off and explore the tools provided in the DASH GIS. Use the opacity tool to blend layers to display layers of information at the same time.
Search:
Use the search tool to look up specific addresses or click on the circular current location button to identify your location on the map.

Drawing tool:
DASH includes a drawing function that will permit the user to mark up and measure parcels and areas on the GIS map.

1) Click on the draw icon on the right of the GIS map screen.
2) Select a drawing mode – point, line or polygons.
3) Scroll down the draw window and select fill, opacity, line colour and measuring tools.
Creating a record ‘Collection’ in Citizen Access

As a registered user of the DASH Citizen Access you can organize and track development applications of interest by creating ‘Collections’ in your account. Applications can be grouped into a single collection or put into multiple collections.

a) To begin, log in to your DASH Citizen Access account using your username and password.

b) Select the hyperlink ‘Search Development Applications’ from the Planning column on the main page.

c) Applications can be searched by address, record information and contact. For the purpose of this module, the record search will be by address.
d) Select the result that matches the municipal address input into the search fields.

e) The records associated with the address will appear below.
f) Select the records you would like to add to a collection by checking the box beside the record number. Select the ‘Add to Collection’ hyperlink located above the list of records.

![Add to Collection dialog]

- Choose to add to an existing collection or create a new one. For this exercise, select ‘Create a New Collection’, give it a name, and provide a brief description. Click ‘Add’ to finalize.

The collection will be created. A temporary notice will inform you that the collection is ready. To access the new collection, locate the hyperlink or menu option at the top right beside the login name.
h) When you select the collections hyperlink your list of collections is displayed below the link. From here you can also view and delete your collections.

Select a collection that you want to view and edit. The collection selected will be displayed in the window. From this window you can:

- copy a record from the collection to another collection;
- move records from a collection to another collection;
- remove records from a collection;
- rename a collection;
- delete a collection;
- open and view a record in the collection; and
- show the location of the records in the Citizen Access GIS platform.