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StreetscapePLUS for Builders

How to Submit for Architectural Approval



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 Outperform.

ACTIVITY TYPES

The different **Activity Types** are for managing the different aspects of a lot throughout it's lifetime. Taking it from it's initial state from the Land Developer all the way through to the Final Architectural and Engineering Inspections.

The six different Activity Types are:

1. Architectural Approvals
2. Architectural Inspections
3. Sales to Builders
4. Sales to Homebuyers
5. Engineering Inspections
6. Construction

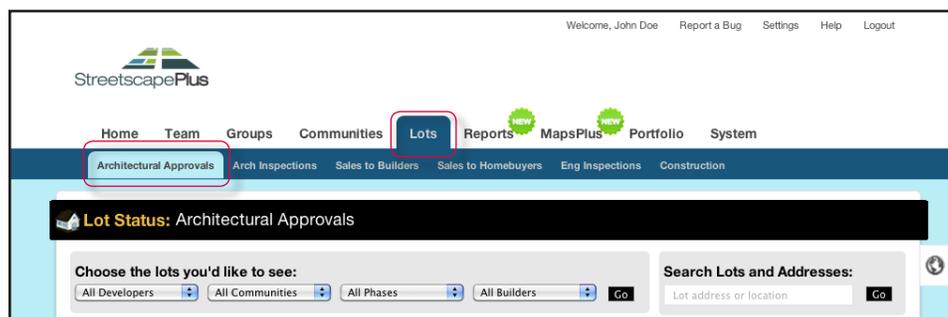
Architectural Approvals

StreetscapePLUS allows for a **variety of Activities** to be performed, from **Architectural Approvals** to **Lot Reservations** and **Inspection Requests**. Each of these Activities are activated at the discretion of the Land Developer and may not be available on all Communities.

The process of Architectural Approval can be different from one Community to the next, based on a unique set of requirements for each Land Developer or each Community. We will describe a **typical process** below:

SUBMITTING A REQUEST

Lot Approvals are generally processed under the LOT section, and in this case we are dealing with Architectural Approvals:



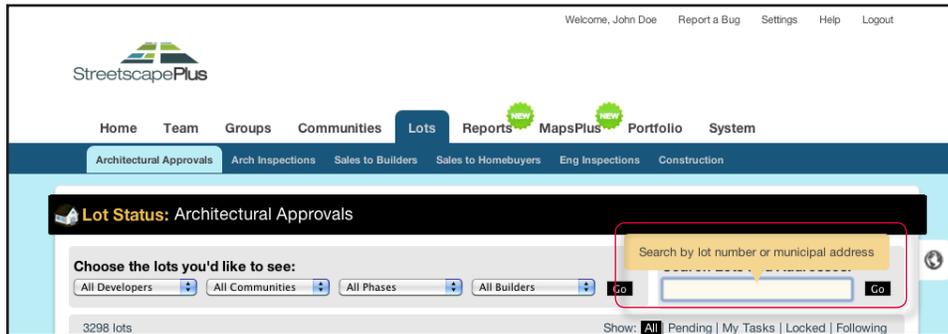
On the LOTS Screen a Builder would typically see a large SUMMARY of LOTS in the Communities in which they are active. Some of the lots may be assigned to them, and some may be assigned to other Builders.

Please Note: Although Summary information is made available to all Builders on neighbouring lots; **no detailed files or information is shared.**

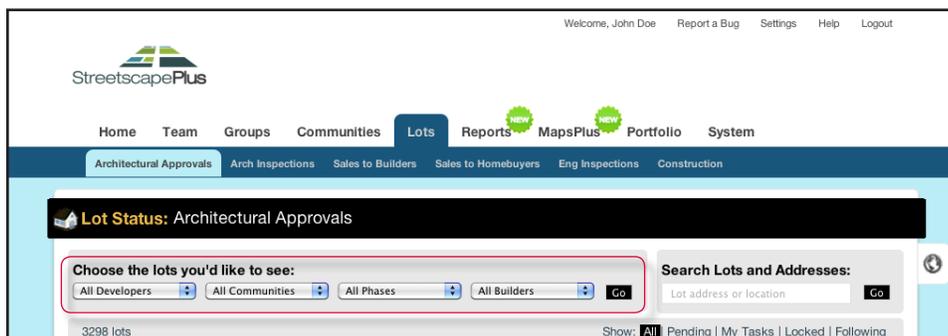
Requesting for Architectural Approval begins with finding the appropriate Lot Record. You can find your Lot using one of two methods:

1. Search: The Search box in the upper right corner will return results for exact text matches in both the Civic Address field and Lot Number.

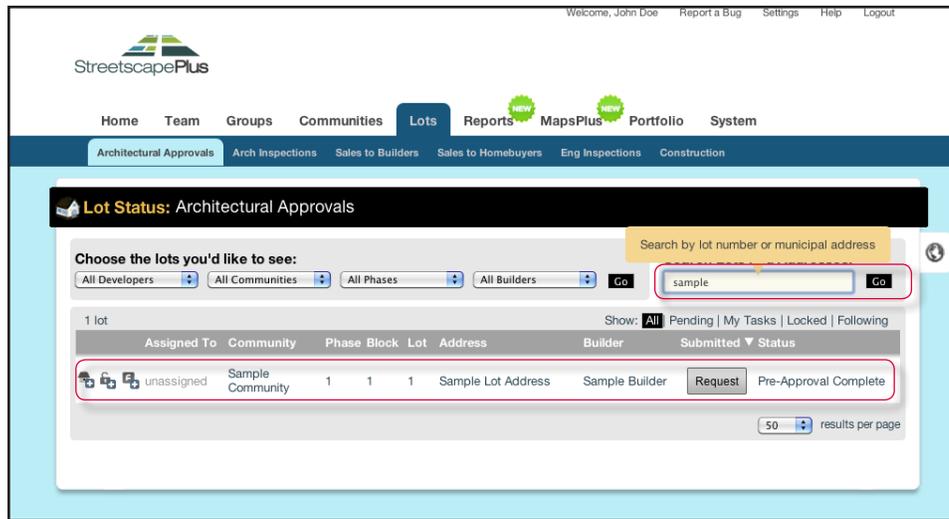
You'll need to click the 'Go Button >' to display your filter settings, or press the [Enter] key on most computers.



2. Filter: The Pull-down menus across the top, and beside the Search box allow you to narrow the number of lots displayed by choosing a specific group of lots, such as a particular Community & Phase.



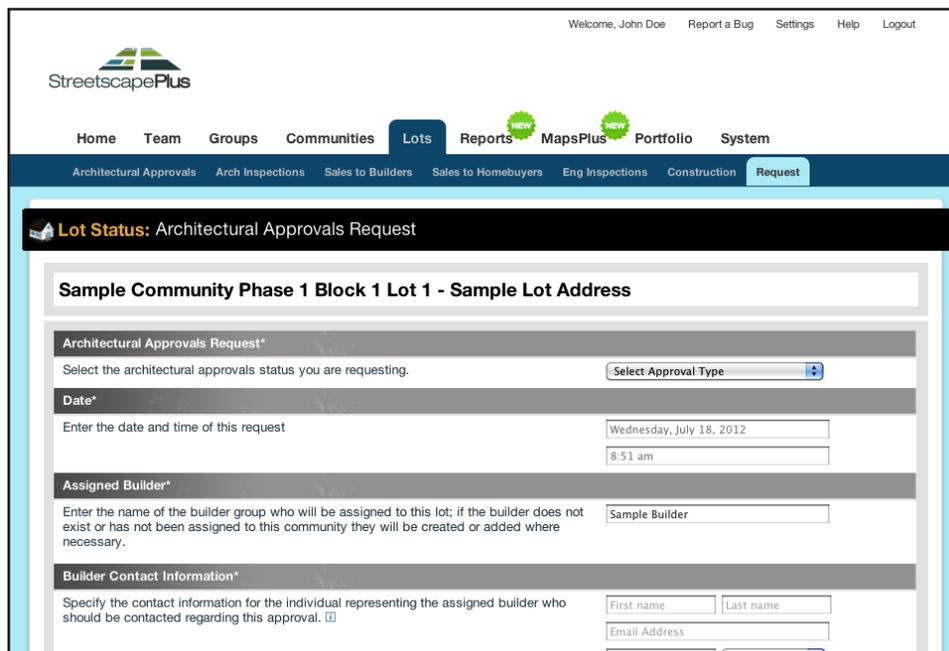
Once you've submitted your Search and/or Filter settings, the screen will generate your results and show the results:



Please Note: Be sure to enter an exact character match when using the Search feature. Partial words will work, but **misspelled words will return no results.**

Now that you've found the Lot Record you're looking for, and so long as there is no current Approval Pending, you'll see a REQUEST button beside the current Architectural Approval status on the lot.

A click on the REQUEST button will take you to the Approval Request Form:



Fill out the form completely (required fields are marked with a *), starting with the **Type of Approval** requested.

The screenshot shows the StreetscapePLUS web interface. At the top, there is a navigation bar with links for Home, Team, Groups, Communities, Lots, Reports, MapsPlus, Portfolio, and System. Below this is a sub-navigation bar with links for Architectural Approvals, Arch Inspections, Sales to Builders, Sales to Homebuyers, Eng Inspections, Construction, and Request. The main content area is titled 'Lot Status: Architectural Approvals Request' and contains a form for 'Sample Community Phase 1 Block 1 Lot 1 - Sample Lot Address'. The form has several sections: 'Architectural Approvals Request*' with a dropdown menu for 'Select Approval Type' (options: Awaiting Builder Input, Awaiting Developer Input, Final Approval Request, Pre-Approval Request, Revision Request); 'Date*' with a text input field; and 'Assigned Builder*' with a text input field. A red box highlights the dropdown menu.

If you're not certain what Approval Type you require, or which forms you'll need, consult the Developer's process for Architectural Approvals – generally included in the **Architectural Guidelines** for the Community.

Once you've attached the appropriate files necessary to make your Approval Request, use the SUBMIT button to complete the process.

The screenshot shows the 'Builder Contact Information*' and 'Buyer Information' sections of the form. The 'Builder Contact Information*' section includes fields for First name, Last name, Email Address, and Phone Number (with a dropdown for 'work'). The 'Buyer Information' section includes fields for First name, Last name, and Email Address. Below these is the 'Attach Files' section, which allows users to upload files for 'Request Form', 'Plot Plan (if needed)', 'Working Drawings (if needed)', and 'Other (if needed)'. Each category has a 'Choose File' button and a 'no file selected' status. At the bottom of the form is a 'Comment' section with a text area and a 'Submit' button. A 'Need Help?' link is visible in the bottom right corner.

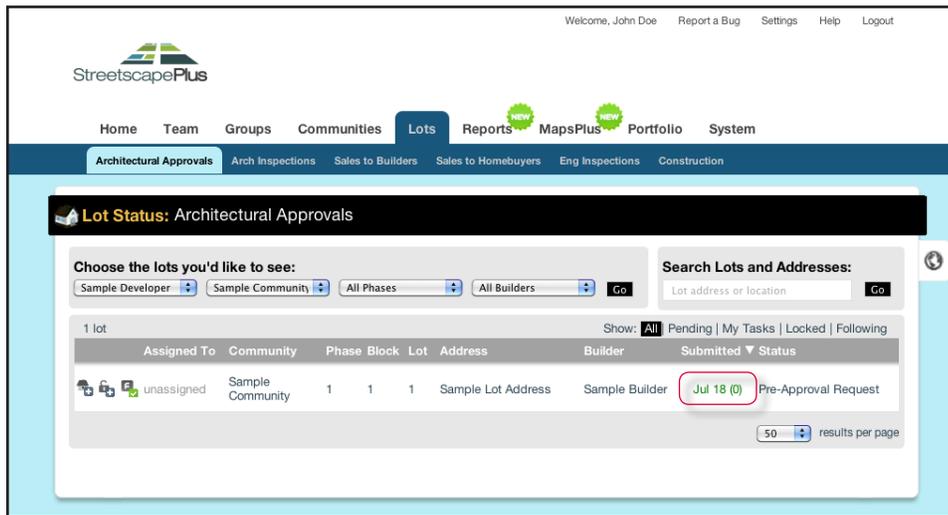
If you have any errors on the form, you'll get an error message and red indicators will show you the fields in which you need to add or correct information:

The screenshot shows a web application interface with a navigation menu and a form titled "Architectural Approvals Request". At the top, a red error message states: "Error: Oops! You missed something. Some form fields are 'Required' before your information can be submitted." Below the error message, the navigation menu includes "Home", "Team", "Groups", "Communities", "Lots", "Reports", "MapsPlus", "Portfolio", and "System". The "Request" tab is active. The form contains several sections: "Architectural Approvals Request*" with a dropdown menu for "Select Approval Type" (marked "Must specify"); "Date*" with input fields for date and time; "Assigned Builder*" with a text input field; "Builder Contact Information*" with input fields for "First name", "Email Address", and "Phone Number" (all marked "Required"); "Buyer Information" with input fields for "First name", "Last name", and "Email Address"; and "Attach Files" with a "Choose File" button and a "Plot Plan (if needed)" section. A "Need Help?" link is visible at the bottom right.

Once you've successfully submitted the **Approval Request**, you will see a **Green Confirmation** message and you will be prompted to configure the notifications of the lot in question for yourself. **By default**, you will have all notifications set to **on**. This means that **whenever a Status Change occurs on the lot you will receive an email notification stating the change**. Select the Okay button when finished.

The screenshot shows a dialog box titled "Follow Lot: Sample Community Phase 1 Block 1 Lot 1". The dialog asks: "Do you want to be notified on status changes to this Lot?" Below the question, it states: "You will be notified at john.doe@autounioncarshow.com when the Lot Approval Status is changed to the following:". A list of status changes is provided, each with a checked checkbox: "Awaiting Builder Input", "Awaiting Developer Input", "Awaiting Submission", "Final Approval Complete (w/o Prelim)", "Final Approval Complete (with Prelim)", "Final Approval Declined", "Final Approval Request", "Pre-Approval Complete", "Pre-Approval Declined", "Pre-Approval Request", "Revision Complete", "Revision Declined", and "Revision Request". A green "Okay" button is located at the bottom right of the dialog.

Once selecting which notifications you will receive, you will be sent back to the LOT SUMMARY screen. You will now see your Approval Request listed as with its new STATUS, and the Date Submitted now replaces the REQUEST button.



Please Note: When a REQUEST is submitted, both the Builder Contact and the User who submitted the request will receive a **confirmation email message**.

REVISION REQUESTS

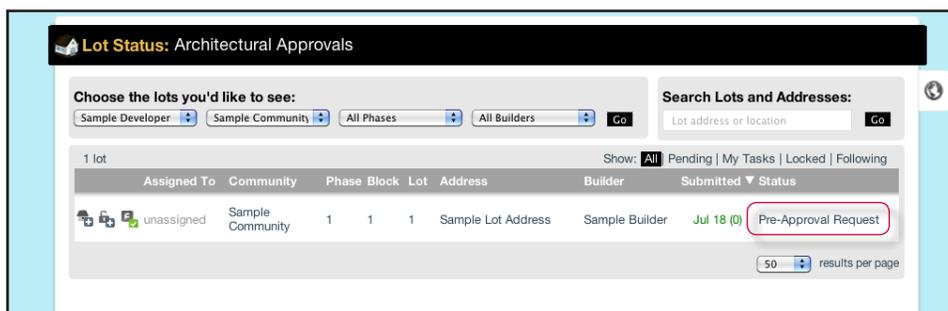
From time-to-time you may need to submit a Revision Request. There are two distinct ways to do this:

1. Revise an existing Approval Request (it is pending);
2. Revise a completed Approval Request;

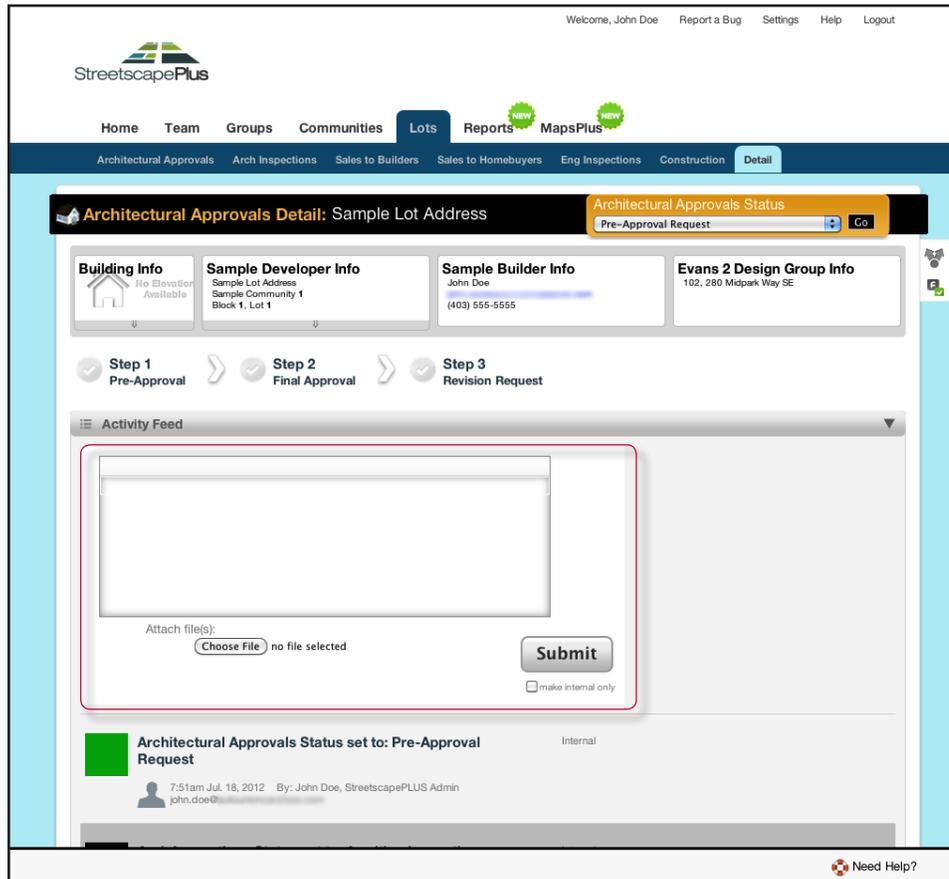
To revise an **existing Approval Request** there is no REQUEST Button available on the Lot Summary screen – so there is another way to provide the information. You’ll need to use the POST A COMMENT feature.

Comments, including file attachments can be posted to any LOT RECORD. In order to do this, you’ll need to lookup the LOT RECORD (see Submitting Approvals).

Once you’ve found the lot you need, click on the STATUS link to view/edit the LOT RECORD:

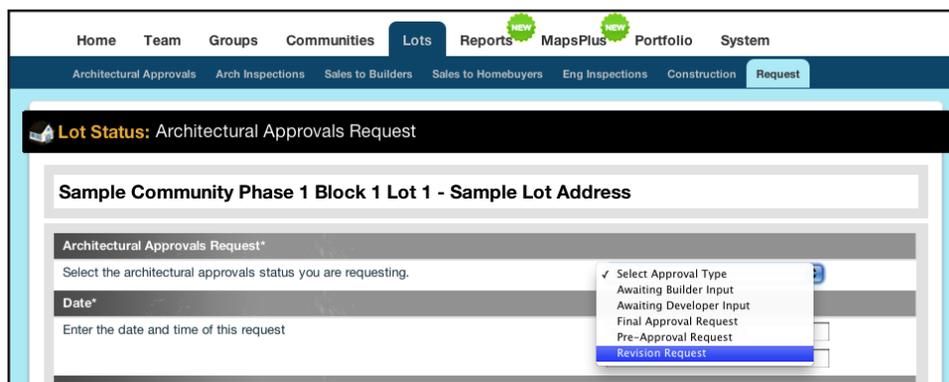


The LOT RECORD contains information and uploaded files that related specifically to the Architectural Approval activity on a particular lot. The **Activity Feed** is a summary of all action, and provides a place to **Enter a comment/note**.



You should use the Forms relevant to the pending Request Type that you want to revise (Example: Pre-Approval Request).

To **revise a Completed Approval** you will go through the same process for making your original Approval Request (see Submitting a Request). You'll simply choose '**Revision Request**' as your Approval Type.



CHECKING STATUS

The Lot Summary provides a quick look at all pending Approval Requests, and colour codes each one by the number of business days since the date of submission.

unassigned	Revision Request	Jun 17 (5)
unassigned	Final Approval Requested	Jun 22 (3)
unassigned	Final Approval Request	Jun 23 (2)
unassigned	Pre-Approval Requested	Jun 27 (1)
unassigned	Final Approval Granted	Request

A review of the LOT RECORD may provide additional **information on any work-in-progress** from any comments or other information posted to the **Activity Feed**.

EMAIL NOTIFICATIONS

To avoid the need for daily review of the LOT SUMMARY to check on the status of pending Approvals – a notification feature can let you know when things have changed.

By selecting the Follow icon  located on either the LOT SUMMARY or LOT RECORD each user can setup personalized email notifications.

StreetscapePLUS

Welcome, John Doe | Report a Bug | Settings | Help | Logout

Home | Team | Groups | Communities | **Lots** | Reports | MapsPlus | Portfolio | System

Architectural Approvals | Arch Inspections | Sales to Builders | Sales to Homebuyers | Eng Inspections | Construction

Lot Status: Architectural Approvals

Choose the lots you'd like to see: Sample Developer | Sample Community | All Phases | All Builders | Go

Search Lots and Addresses: Lot address or location | Go

1 lot | Show: All | Pending | My Tasks | Locked | Following

Assigned To	Community	Phase	Block	Lot	Address	Builder	Submitted	Status
 unassigned	Sample Community	1	1	1	Sample Lot Address	Sample Builder	Jul 18 (0)	Pre-Approval Request

50 results per page

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Home | Team | Groups | Communities | **Lots** | Reports | MapsPlus

Architectural Approvals | Arch Inspections | Sales to Builders | Sales to Homebuyers | Eng Inspections | Construction | **Detail**

Architectural Approvals Detail: Sample Lot Address

Architectural Approvals Status: Pre-Approval Request | Go

Building Info: No Elevation Available

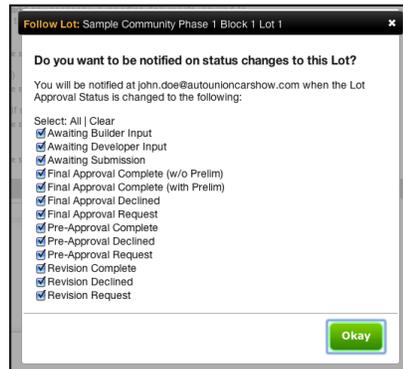
Sample Developer Info: Sample Lot Address, Sample Community 1, Block 1, Lot 1

Sample Builder Info: John Doe, (403) 555-5555

Evans 2 Design Group Info: 102, 280 Midpark Way SE

Step 1 | Step 2 | Step 3

You can be notified by email immediately, as soon as any Architectural Approval status is changed. If, for example, you would like to be informed when Approval Status is changed to “Final Approval Complete”, then select that option from the Lot Follow list (See below).



Notifications are currently accomplished on a lot-by-lot basis. **Bulk Notifications** can be setup by request. So – if you want to be notified about certain actions for an entire community, just contact StreetscapePLUS Support (see SUPPORT), and we’ll be happy to help you out.

LOCKED RECORDS

Land Developers have the option to lock various records at their discretion. A common process is to Lock Final Architectural Approvals until a review of contractual and financial obligations on the lot are verified. This is an example of a Public Lock on Final Approval records in a LOT RECORD (visibly locked).

You’ll need to click to ‘Go Button >’ to display your filter settings.

