

BUILDING CONTROL: ELECTRONIC BUILDING PLAN APPLICATIONS

Collaborator Extension User Guide

Business Engineering
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1 INTRODUCTION TO COLLABORATOR SOFTWARE

1.1 WHAT IS COLLABORATOR

Collaborator becomes the first comprehensive full life cycle document management and records management solution for the entire enterprise. This functionality gives customers comprehensive, complete lifecycle management of all corporate records and information holdings, in paper or electronic formats.

1.2 THE AIM OF ELECTRONIC BUILDING PLAN APPLICATION

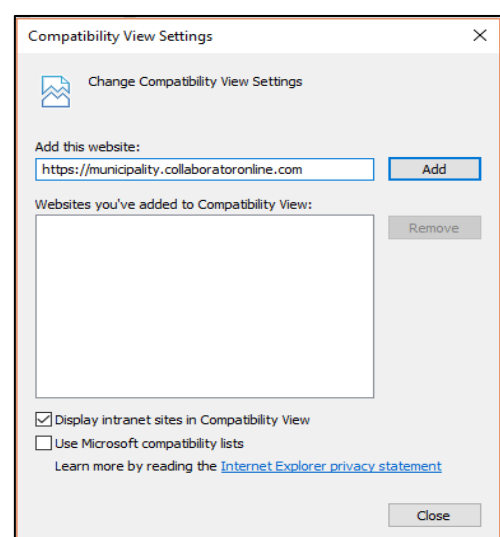
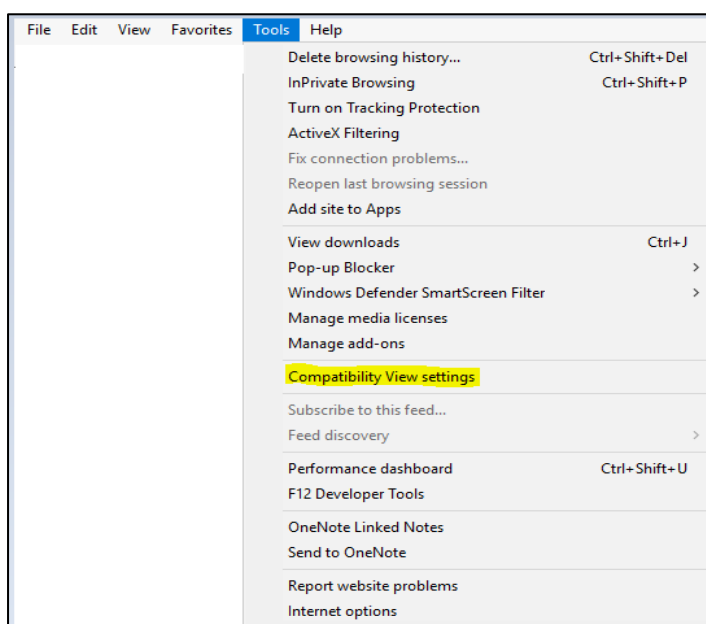
The aim of the online Building Application Process is to allow for a more efficient way to register a building plan. The online application allows home owners/architects to log onto the website and monitor the progress of the online applications without having to physically come to the Municipality.

1.3 PRE-REQUISITES TO ACCESS COLLABORATOR EXTENSION

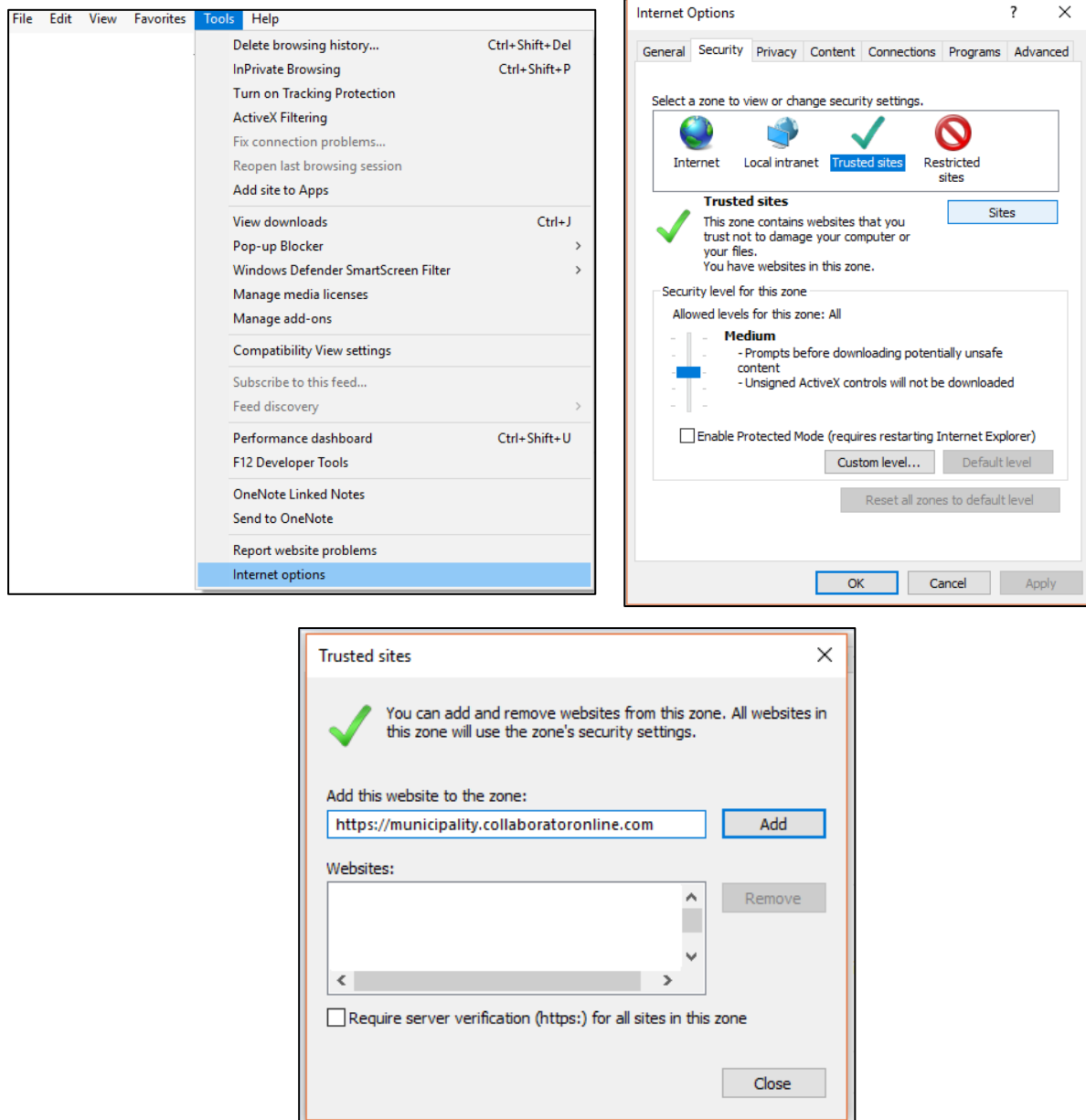
- Access to a computer and the internet
- Latest version of Internet Explorer
- Email address

1.3.1 INTERNET EXPLORER CHECKS

Open Internet Explorer and go to the Building Control web address. Select 'Tools', scroll down to 'Compatibility Settings'. The web address will appear in the bar shown below. Click on 'Add' and then close the screen



Select 'Tools' and scroll down to 'Internet Options'. On the second tab (Security) click on 'Trusted Sites' then 'Sites'. Click on 'Add' then close the pop up box. Close the internet and reopen and you can proceed to register on the site



1.4 TERMS OF INTEREST USED IN THE DOCUMENT

On Premise

- This is the Collaborator System that the Municipality uses

Extension

- This is the Collaborator System external users make use of, to upload and monitor the Building Plan Applications

Tasks

- Each action that needs to be completed are viewed in the form of a Task.
- A Task needs to be completed for the Process to continue to the next Stage.

Web Part

- A web part looks like a 'block' that has controls, enables end users to search existing Building Plans, create new Applications etc.

Action Button

- Depicted as 3 dots (...) this enables the user to choose from the list of options available to perform certain tasks.

Landing Page

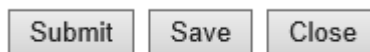
- The first screen displayed after logging in.

2 NAVIGATING THROUGH COLLABORATOR EXTENSION

2.1.1 EXTENSION TASKS

Each task consists of:

1. Title
2. Field Labels
3. Fields (These can be 'Display' or 'Entry Fields')



Buttons

Submit – completes the task and triggers the successor task.

Save – keeps the data already captured.

Close – Returns to the user's Tasks without saving data.

Examples of a task:

Each step you need to complete is a task, e.g. Uploading an Outstanding Supporting Documents will open a task that needs to be completed. Preparing the Invoice is another example.

These tasks need to be completed to move on to the next step in the process.

2.1.2 EXTENSION ICONS



This icon gives a quick overview of field values captured during a process.



This icon displays relationships created between two objects



This icon can either be grey indicating that there is no attachment or yellow indicating that a document can be viewed by clicking on the icon.



Reminders can be set on a specific record, but will only popup when signed into Collaborator's Web Interface.



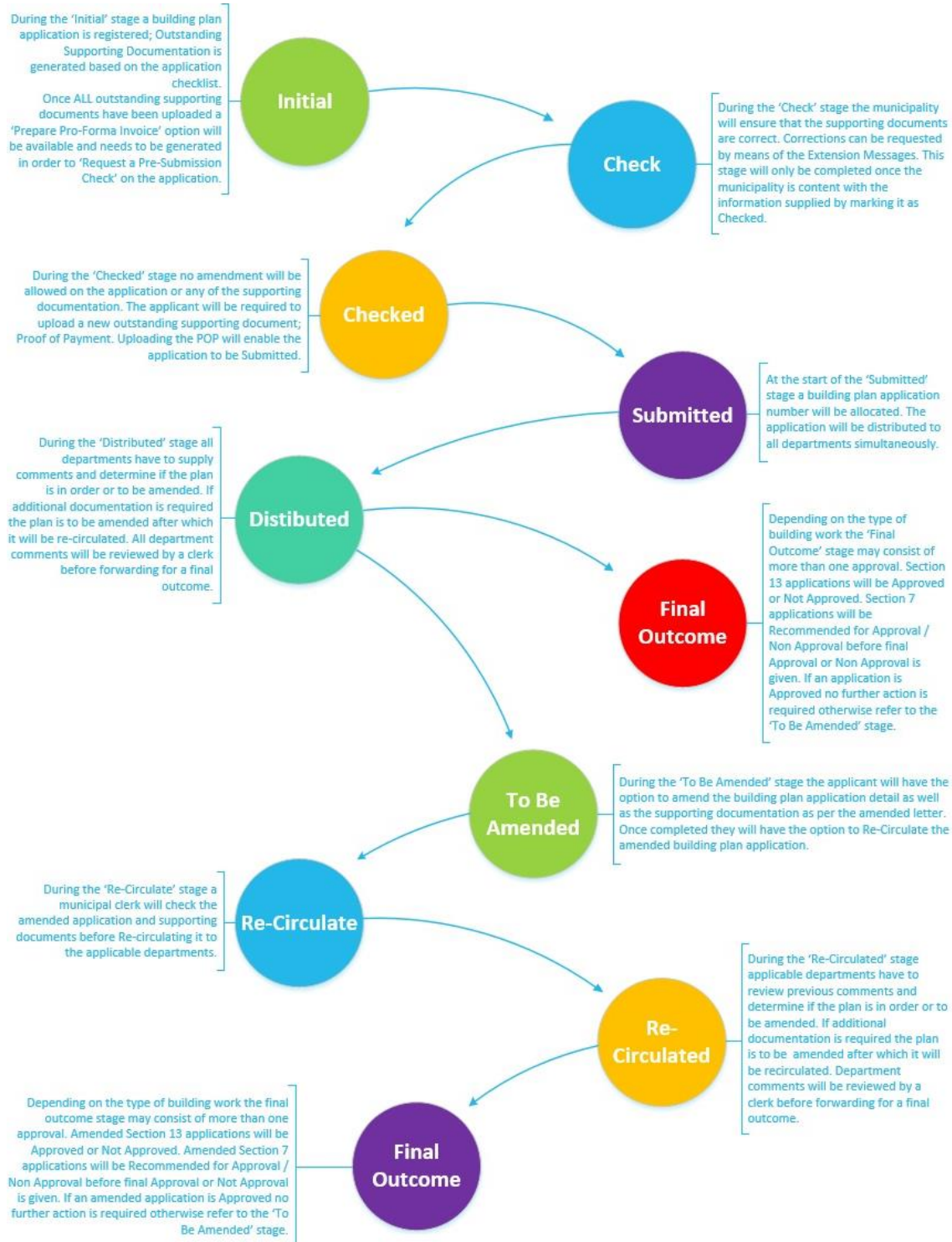
This icon gives an overview of the process followed on Collaborator. It lists each completed task, per user, along with its time allocations. Active tasks, red and 0% completed, can easily be identified.



This icon takes you to the location of the specific record inside the Corporate File Plan

2.2 APPLICATION STAGES & RULES

2.2.1 BUILDING PLAN APPLICATION STAGES



2.2.2 WEB PART SEQUENCES

2.2.2.1 Practice / User Web Part

Practice

Action	Registration Number	Practice Name	Professional Entity

When selecting the Action Button (...) there will be a few options:

1. Add Building Plan Application
2. Edit Practice Details
3. Add Base Plan Project

When 'Add Building Plan Application' is selected, an online application form will open, that needs to be completed, and Submitted.

Practice

Action	Registration Number
...	

Action

- [Add Building Plan Application](#)
- [Edit Practice Details](#)
- [Add Base Plan Project](#)

2.2.2.2 Building Plan Applications Web Part

Building Plan Applications

Action	Object Ref	Owner	Suburb	Street	Erf	Stage

Once the Application has been submitted it will appear in this Web Part.

When clicking on the Application, to highlight it, the Web Part 3 will display Outstanding Supporting Documents that will need to be loaded to continue.

Additionally, you will need to generate the Pro-Forma Invoice from the Application.

When Selecting the Action Button (...) You will see the following options:

1. Prepare Pro-Forma Invoice
2. Edit Application
3. Delete BC Application
4. Base Plan Land Unit
5. Add Building Inspection

Building Plan Applications

Action	Object Ref
...	

Action

- [Prepare Pro-Forma Invoice](#)
- [Edit Application](#)
- [Delete BC Application](#)
- [Base Plan Land Unit](#)
- [Add Building Inspection](#)

When 'Prepare Pro-Forma Invoice' is selected another task will open, the invoice will need to be generated to continue.

Building Plan Applications

Action	Object Ref
...	

Action

- [Request Pre-Submission Check](#)
- [Edit Application](#)

Once the Pro-Forma Invoice has been generated and the all Supporting Documents attached, the following options will open on the Action Button:

1. Request Pre-Submission Check
2. Edit Application

When selecting the Pre-Submission Check, it will send the application to the On Premise site for the scrutiny check.

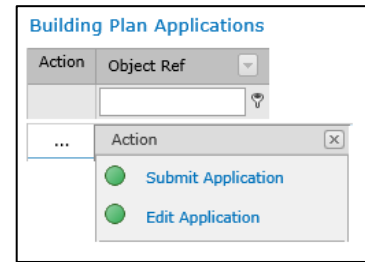
After the application has been checked the application will appear on the users' side as 'Checked' and a new item will appear in the Outstanding Supporting Documents list

*(See the Outstanding Supporting List for the details of this list – Web Part 3)

Once the Proof of Payment has been attached there will be new options on the Action Button:

1. Submit Application
2. Edit Application

Once the Application has been submitted, the application will appear On Premise to be distributed to the different departments for comments.



2.2.2.3 Outstanding Supporting Documents Web Part

Outstanding Supporting Documents				
Action	Checklist Item Code	Checklist Item Name	Checklist Item Description	Sequence

There are Compulsory Supporting Documents that need to accompany every Building Plan Application.

Outstanding Supporting Documents:

1. Title Deed
2. Municipal Application Form
3. SACAP
4. SANS 10400 Form 1
5. SANS 10400 Form 2
6. Power of Attorney
7. Building Plan
8. Abstract from relevant General Plan and Servitude Diagrams

**Appears in the Initial Stage*

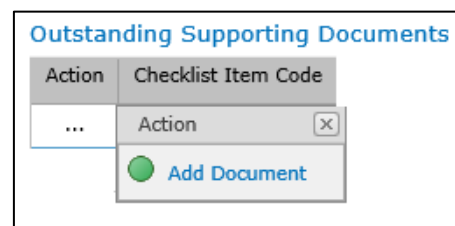
9. Proof Of Payment

**Appears in the Checked Stage*

On the Application form if any checklist item was selected, then it will generate an additional outstanding document.

When you select the Action Button on the Supporting Document you will see that following:

1. Add Document



By selecting this option it will open a task that allows you to browse your File Explorer on your PC, to search for and attach the document.

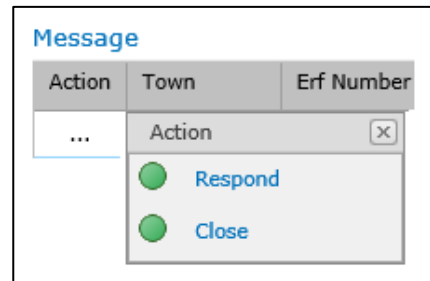
Not all Building Plan Applications are the same, so if for an application 1 or more supporting documents are not required, the system will still require you to upload a document in its place. Make sure the document is relevant to the application.

2.2.2.4 Message Web Part

Message				
Action	Town	Erf Number	Title	Date

The Municipality can send the user messages, if any changes should be made on the application or with the uploaded documents.

The message function can only be initiated from the Municipalities side, the user will only have the option to respond or close the message.



2.2.2.5 Supporting Documents Web Part

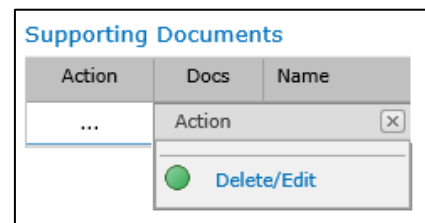
Supporting Documents			
Action	Docs	Name	Status

These are the list of Outstanding Supporting Documents, that are displayed in this web part once successfully uploaded and attached to the application.

Action Button Options:

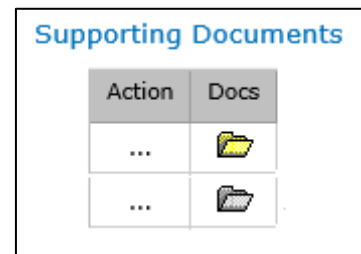
1. Delete/Edit

If you delete the Supporting Document, the document will move to Web Part 3: Outstanding Supporting Document, where the document can be added again.



If the folder icon is Yellow, it means that there is a document attached. If the folder is Grey, it means the document was not attached correctly.

All Documents need to be added to proceed to the next step.



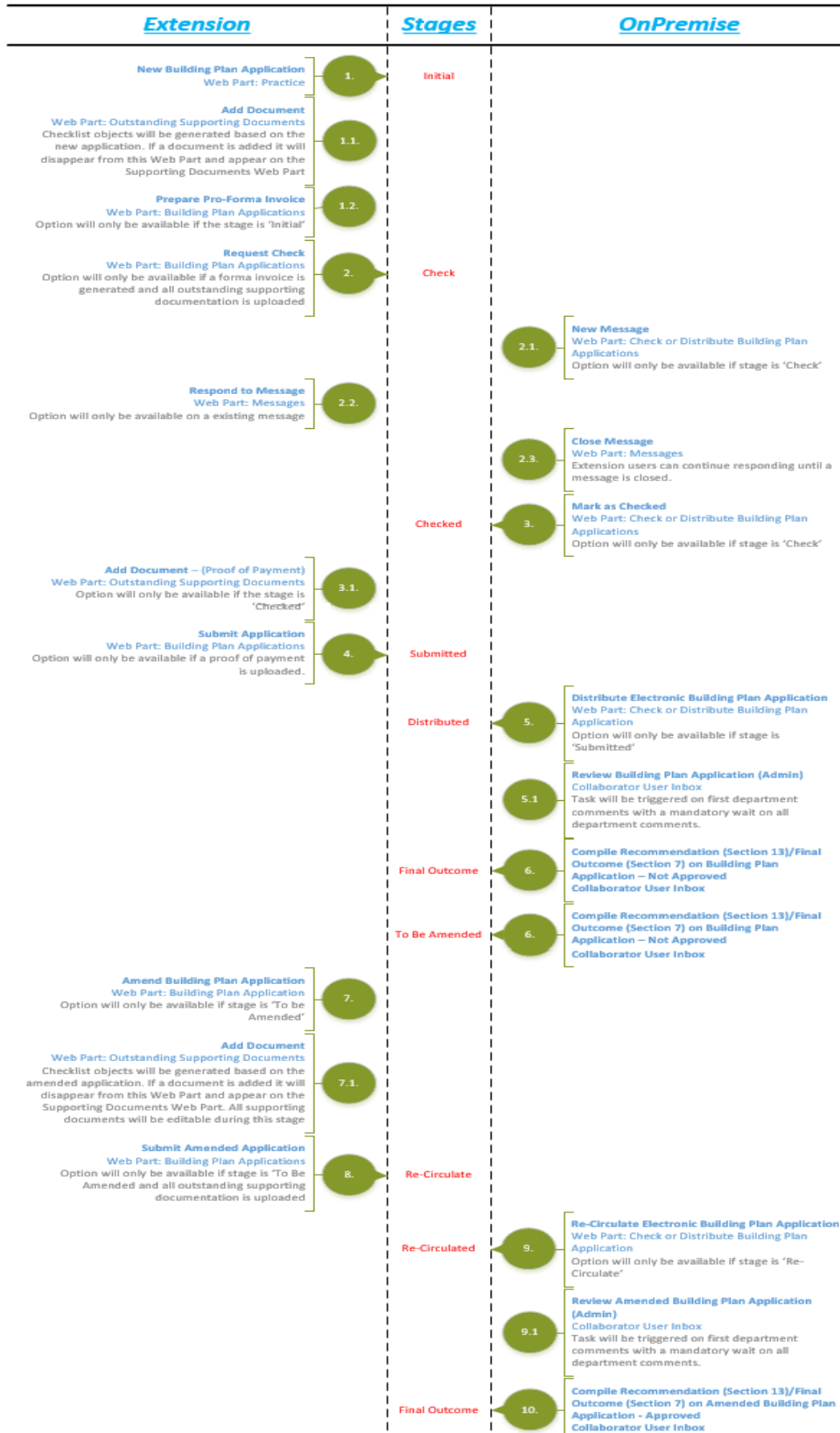
2.2.2.6 Pro-Forma Invoice Web Part

Proforma Invoices				
Action	Docs	Invoice Number	Invoice Date	Total

This web part shows the Fee Calculation of the Building Plan Application. (Web Part 2 – Building Plan Application)

The Fee Calculation is only an estimate of the Municipal Fees. The invoice will be generated by the Municipality.

2.2.3 BUILDING PLAN APPLICATION SEQUENCE RULES



3 CREATE AN COLLABORATOR EXTENSION ACCOUNT

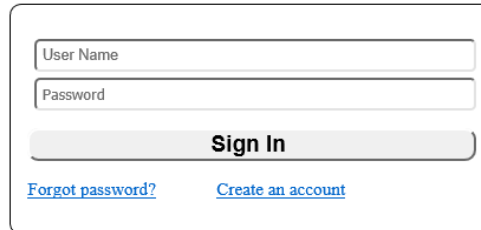
3.1.1 HOW TO LOG IN

In Internet Explorer open the Extension site. When selecting 'Create an Account' please note that the Username will be the Email Address you set.

This is so that you can easily reset your password via the 'Forgot Password?' option.

You will receive an email confirming your account is now active. You will now be able to log in.

**(if no email is received, please check the Spam or Junk Folder of your email)*

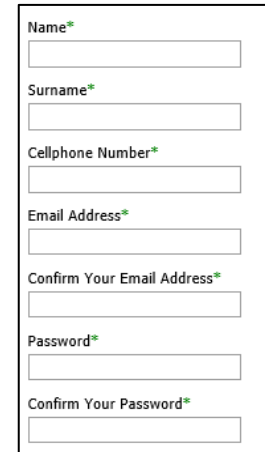


User Name

Password

Sign In

[Forgot password?](#) [Create an account](#)



Name*

Surname*

Cellphone Number*

Email Address*

Confirm Your Email Address*

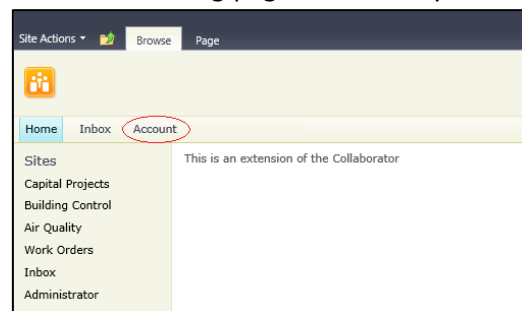
Password*

Confirm Your Password*

3.1.2 REGISTERING YOUR PRACTICE/USER ACCOUNT

You will be required to register your practice on the site. On the Landing page of the site you will see the options Home, Inbox, and Account.

When selecting the Account Tab, you will see your Account Information. On the drop down select the 'Register Practice (Building Control)' then select 'Go' this will open the Task "Capture Practice Information"



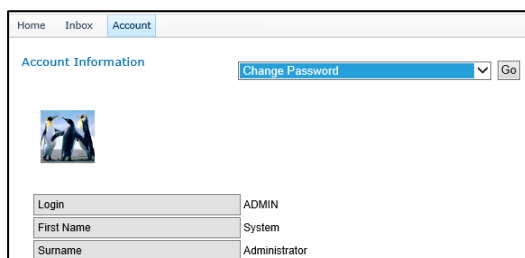
Site Actions ▾ Browse Page

Home Inbox **Account**

Sites

- Capital Projects
- Building Control
- Air Quality
- Work Orders
- Inbox
- Administrator

This is an extension of the Collaborator

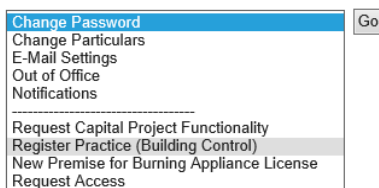


Home Inbox **Account**

Account Information

Change Password ▾ Go

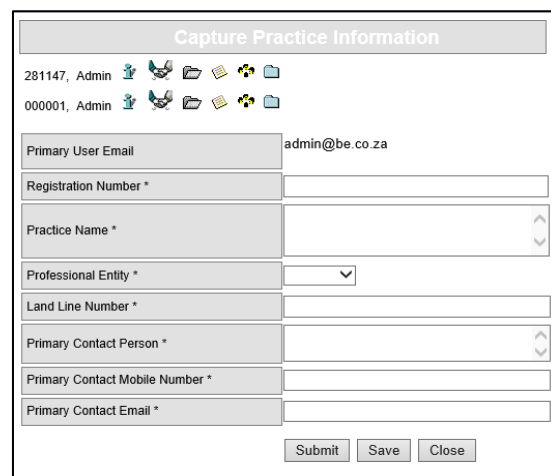
Login	ADMIN
First Name	System
Surname	Administrator



Change Password

- Change Particulars
- E-Mail Settings
- Out of Office
- Notifications
- Request Capital Project Functionality
- Register Practice (Building Control)
- New Premise for Burning Appliance License
- Request Access

Go



Capture Practice Information

281147, Admin

000001, Admin

Primary User Email admin@be.co.za

Registration Number *

Practice Name *

Professional Entity *

Land Line Number *

Primary Contact Person *

Primary Contact Mobile Number *

Primary Contact Email *

Submit Save Close

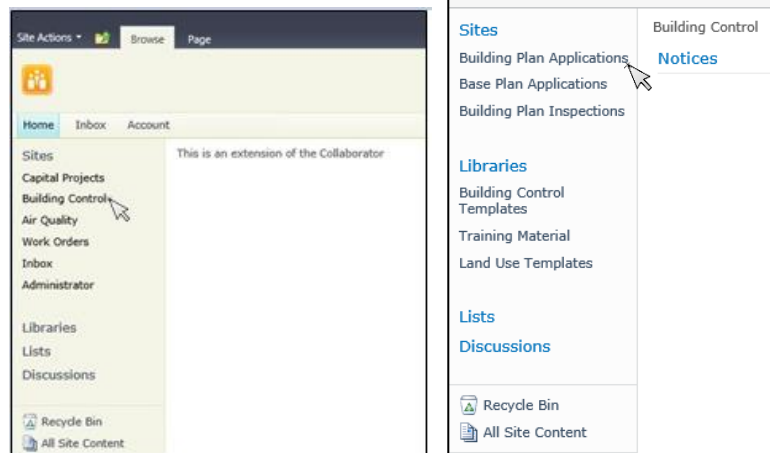
4 PRE-SUBMISSION BUILDING PLAN APPLICATION

4.1.1 REGISTER A BUILDING PLAN APPLICATION

After the account and practice has been registered. You will be able to upload the Building Plan Applications.

On the Landing Page select Building Control, then Building Plan Application.

On the Web Part Practice, the Practice that was previously registered will appear.



Click on the Action Button, and select Add Building Plan Application. An online application will display.

The screenshot shows the 'Building Plan Applications' page. It has a top navigation bar with 'Site Actions', 'Browse', and 'Page'. Below this is a 'Practice' section with a table. The table has columns: Action, Registration Number, Practice Name, and Professional Entity. The first row of the table is empty, and the second row contains an ellipsis (...).

Action	Registration Number	Practice Name	Professional Entity
...			

The Task “New Building Plan Application” will open

All required fields will need to be completed. Click on Submit once done.

4.1.2 UPLOAD OUTSTANDING SUPPORTING DOCUMENTATION

When the application has been loaded you will need to upload the supporting documents. Select the Action Button and click on ‘Add Document’. This will open a Task “New Supporting Document”. On the field ‘File’ there is a button ‘Browse’.

This will allow you to search your Computers File Explorer, attach the file and select Submit once completed. Do this for all Outstanding Supporting Documents on the list

4.1.3 FEE CALCULATOR

Highlight the application. On the Action Button, select ‘Fee Calculator’. This will open a new Task “New Fee Calculation”. Click on the Action Button that says Tariff Code.

The below screen will open. Select the tariff and click on Submit. The Task will display again, select Submit again.

TARIFF CODE	SECTION	DESCRIPTION	CALCULATION TYPE	RATE
1	MINIMUM SCRUTINY FEE	Minimum building plan scrutiny fee applicable to any proposed building work not listed below	Flat Rate	576.49
10	RE-APPROVAL OF LAPSED BUILDING PLANS	50% of the current applicable scrutiny fee will be payable.	Discount	50.00
2	MINOR BUILDING WORK AS PER SECTION 13 OF ACT 103/1977	Subject to checklist requirements	Flat Rate	576.49
3	CHANGE OF OCCUPATION CLASSIFICATION	Conversion of a residential room to a house shop	Flat Rate	576.49
4	NEW BUILDING WORK/ ADDITIONS/FRAMED STRUCTURES/ PRE-FABRICATED STRUCTURE	Minimum building plan scrutiny fees	Rate x Qty	16.67
5	SWIMMING POOL	Swimming Pool Only	Flat Rate	576.49
5	SWIMMING POOL	Swimming pool together with building work per m2	Rate x Qty	11.40
6	BOUNDARY WALLS	Boundary wall with other building work- running meter	Rate x Qty	11.40
6	BOUNDARY WALLS	Boundary wall only	Flat Rate	576.49
7	INTERNAL ALTERATIONS/ CHANGES	Building footprint 250(m2) or smaller	Flat Rate	576.49
7	INTERNAL ALTERATIONS/ CHANGES	Building footprint larger than 250(m2)	Flat Rate	1152.98
9	EXTENSION OF VALIDITY PERIOD OF APPROVED BUILDING PLANS	25% of the current applicable scrutiny fee is payable for the extension of the validity period of an approved building plan with a period not exceeding 12 months.	Discount	75.00

[Submit](#)

4.1.4 REQUEST PRE-SUBMISSION CHECK

Once all the Outstanding Supporting Documents are attached, and the Pro-Forma Invoice has been generated the application can be submitted for the Pre-Scrutiny Check.

Request Pre-Submission Check



Request Check Date

Reference

Owner Name

Land Type

Town

Suburb

Street Name

Stage

Check

Submit

Save

Close

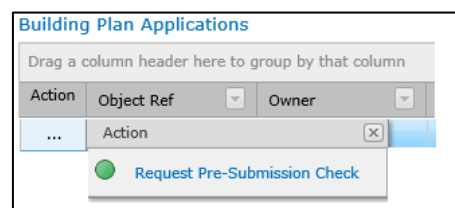
Highlight the application and

click on the Action button. Then select the 'Request Pre-Scrutiny Check'. This will open a Task "Request Pre-submission Check"

Select Submit to continue.

The Stage of the application will move from INITIAL to CHECK.

This means that the municipality is now able to view your application.

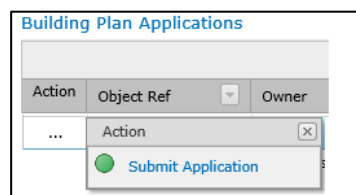


4.1.5 SUBMIT APPLICATION

Once the municipality has checked the application, the Stage of the application will move from CHECK to CHECKED. Only in this stage can the Proof of Payment be added (See UPLOAD OUTSTANDING SUPPORTING DOCUMENTATION 4.1.2)

Highlight the application, select the Action Button.

The Application will move from CHECKED to SUBMITTED.



The 'Submit Application' form contains the following fields: Reference, Owner Name, Application Number, Land Type, Town, Street Name, and Stage. The 'Stage' field is currently set to 'Submitted'. At the bottom, there are three buttons: 'Submit', 'Save', and 'Close'.

4.1.6 AMEND APPLICATION

Once the application has been Checked and Distributed by the Municipality and they find that the application requires amended Building Plan etc. Then you will be required to update the application with the correct document.

When the Application is in the stage INITIAL, CHECK, CHECKED and TO BE AMENDED the Supporting Documents, Status will be 'Upload'. When the Supporting Documents is Status "UPLOAD" only then can you edit the documents.

In Stages SUBMITTED, DISTRIBUTED, FINAL OUTCOME the Status of the Supporting Documents will be Submitted. When the Supporting Documents is Status "SUBMITTED" no documents can be edited.

This means that only when the STAGE of your application is in "TO BE AMENDED" the STATUS of the Supporting Documents will change back to UPLOAD.

Building Plan Applications						
Drag a column header here to group by that column						
Action	Object Ref	Owner	Suburb	Street	Erf	Stage
...	test	test	test	test	test	To Be Amended

Supporting Documents			
Action	Docs	Name	Status
...		Title Deed	Uploaded
...		Municipal Application Form	Uploaded
...		SACAP	Uploaded
...		SANS 10400 Form 1	Uploaded
...		SANS 10400 Form 2	Uploaded
...		Power of Attorney	Uploaded
...		Building Plan	Uploaded
...		Abstract from relevant General Plan and Servitude Diagrams	Uploaded
...		Proof of Payment	Uploaded

Click on the Action button of the SUPPORTING DOCUMENT you want to replace select Delete and upload as before (See UPLOAD OUTSTANDING SUPPORTING DOCUMENTATION 4.1.2)

Once all amended documents have been added, on the Action button a new option will appear. Select 'Submit Amended Application', then the application will move to Stage RE-CIRCULATED.

Action

 Submit Amended Application

Building Plan Applications

Drag a column header here to group by that column

Action	App Nr.	Owner	Street Name	Erf / Farm	Stage	Registration Number
...	306940	test	Paarl	20180202	Re-Circulate	test