

Approving Architectural Modification Applications on the Management Portal

Tip Sheet for Community Executives

Online approval of requests for exterior modifications/improvements is an optional business process that your management company can offer you through the CiraConnect Management / Board Portal ("Classic"), CiraMobile for iOS devices and now, we are very excited to introduce, the new and efficient Management Portal. This Tip Sheet will focus on the Management Portal but is translatable to the other venues which are all integrated and the options are consistent, apart from our new multiple selection tool, which is unique to the Management Portal. More on this later.

To enable the community to allow for online approval, work with your Community Association Manager to determine the minimum number of approvers who will be needed to approve a request and determine who will be set up as approvers. Upon completion of a simple set-up process, modification requests will begin populating to the Board Approval page found in My Work Queue. To assist you with the review process, we have prepared this Tip Sheet, but please do not hesitate to contact your Community Association Manager anytime you have questions or concerns about the process.



Accessing the Management Portal

From the Main Portal Menu

The main website menu listing all available user portals is www.ciranet.com.

Once there, you will see a menu of available portals. The new Management Portal is available at the bottom of the list.



Figure 1: Accessing the Management Portal from the Main Menu

The Board Approvals Page

If you are familiar with the Resident Portal, you will notice that the look and feel is very similar. Users navigate to the modules using the side **Navigation Pane**. We do have additional resources to help board and committee members on using that to its full advantage, but for these purposes, the Board Approval page is in the **My Work Queue** under the sub-node **Community Management**:

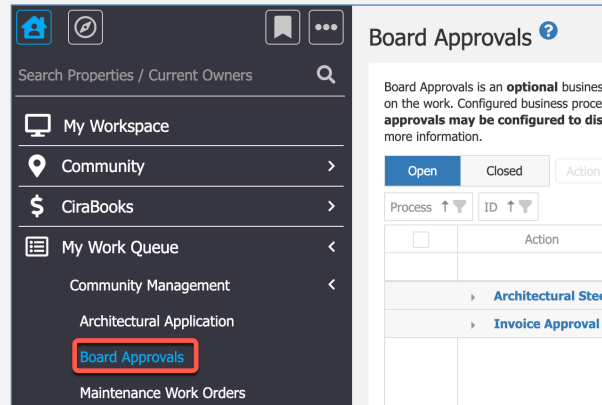


Figure 2: Accessing the Approval Page

Architectural Committee Approval is one of three potential online approval options (Invoice Approval and Collections Approval being the other two). If you are an approver for more than one option, when you first open the page, the approval types will appear in alpha order in a grid format, with the entries "collapsed" under the **Process** header.

There are two options to expand the grid to view to the items that you want to action on:

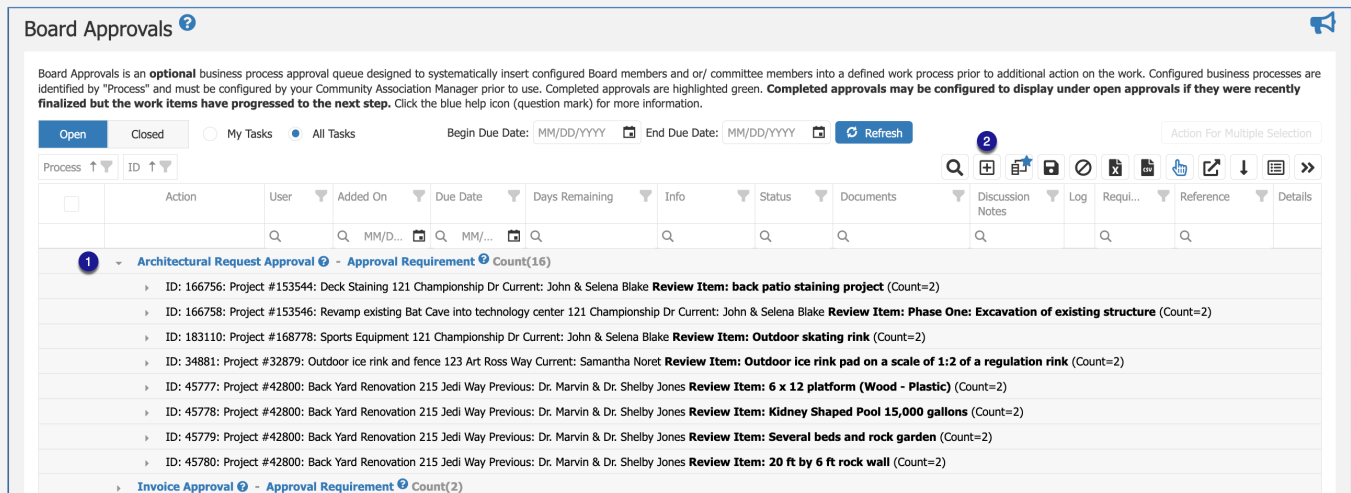


Figure 3: Options to Expand the Grid View

1. Click on the arrows to the left of the **Process** title and the **ID** line items to manually expand the grid as you need it, or;

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2. Click on the “+” symbol in the grid settings to expand the entire grid. (You can in turn then click the minus sign in the same location to collapse them again.)

Navigating the Page View

Before we step you through reviewing and approving the pending modification requests, we will take you through some of the features available on the page view.

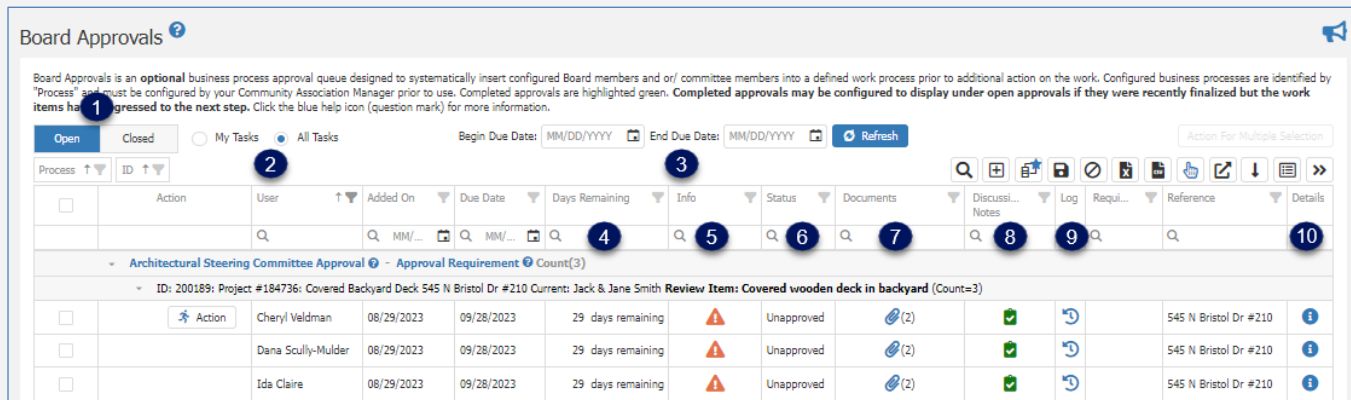


Figure 4: The Board Approvals Page

1. **Open** and **Closed** Tabs. The page is split into two tabs, with the **Open** items being the default view, but users can look back on actioned items by clicking on the **Closed** tab.
2. **Task View**. The page will open by default to the setting of **All Tasks**, which means that you will be able to see, but not action on, all other voters' line items and be able to assess immediately what their status is. This can be helpful when trying to understand what your fellow members are leaning toward but also to know who has actioned on an item versus who might need a little nudge to cast their vote to be able to move a project forward. That said, if you have many applications to review, it can be helpful to switch to **My Tasks**, which filters the view down to just your line items. This also helps the page work more efficiently.
3. **Begin Due Date** and **End Due Date**. These date ranges can be used in either tab to help filter down to only the results you wish to concentrate on.
4. **Days Remaining**. This column helps you gauge how long you have to review the application before the due date, which is configured internally by your management team based on your governing documents. If the application is past due based on those settings, the font appears in red and will count down how many days the files are past due.
5. **Info**. These symbols allow a quick visual assessment of all the users' voting status. In the illustration above, the caution symbol tells us that no one has voted on the pending application. A green check mark would indicate the voter approved the item, a green flag tells us they voted to approve with a stipulation and a red X indicates a denial.

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- Status.** However, we do also state it clearly in the next column.
- Documents.** This allows a quick view of all support documents for the application. Click on the paperclip to access them. In this example, we can quickly tell there are two documents attached.
- Discussion Notes.** This notepad allows you to communicate with your fellow committee members about the request you are working on. You can see in the illustration that there is a note in place since the notepad is highlighted green with a check mark. If there are no notes yet, the notepad is clear. To add a new note, simply click on the icon to open to a pop-up window enabling you to leave your comment.
- Log.** Most actions taken in CiraNet are logged so this allows you to see the activity for this line item, including when email reminder notifications were sent.
- Details.** Clicking on the “i” here opens to the project view with the details on the submission.

Any line items highlighted in green in the Open tab indicate a recently actioned project. By default, these items will remain in place on the Open tab for three days¹ to allow the committee members to keep track of the files that have been brought before them recently. This does not, however, impede the response to owner that the management team will be working on in the interim. Note that the **Action** button seen on your open items is replaced with **View** in this status, since the item has been moved on or rejected back and no further action can be taken on it.

Architectural Request Approval		Approval Requirement		Count(854)							
ID: 195905: Project #180717: Door Hardware				Review Item: Door Hardware (Count=7)							
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	✓	Approved	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	🚩	Approved with Stipulation	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	✗	Denied	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	⚠️	Unapproved	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	⚠️	Unapproved	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	⚠️	Unapproved	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i
<input type="checkbox"/>	View	07/13/2023	08/10/2023	18 days overdue	⚠️	Unapproved	(1)	<input checked="" type="checkbox"/>	🔄	Flagstone Ave	i

Figure 5: Viewing an Approved Project

Viewing the Request

As noted above, you can use the line item to view the documents and the project in the system if you want to review it in advance of making a vote.

Every application is opened as a **Project** with at least one **Item**. You will be voting on each Item. We support this structure to allow a larger modification project to be assessed in its component parts instead of one whole. In other words, if the committee finds part, or even most, of the project is

¹ This is configurable by community association.

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acceptable, individual Items can be approved and the owner can move forward on those, but the construct allows you to in turn deny the component you find is not meeting community standards, at least temporarily.

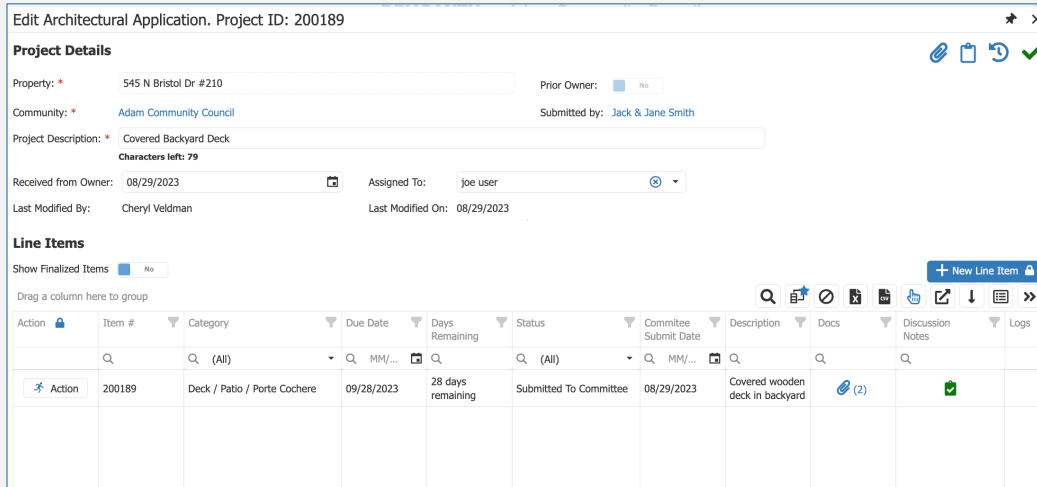


Figure 6: The Project View

Acting on a Request

When you are ready to decide, use your mouse pointer to click on **Action** to open to a pop-up window².

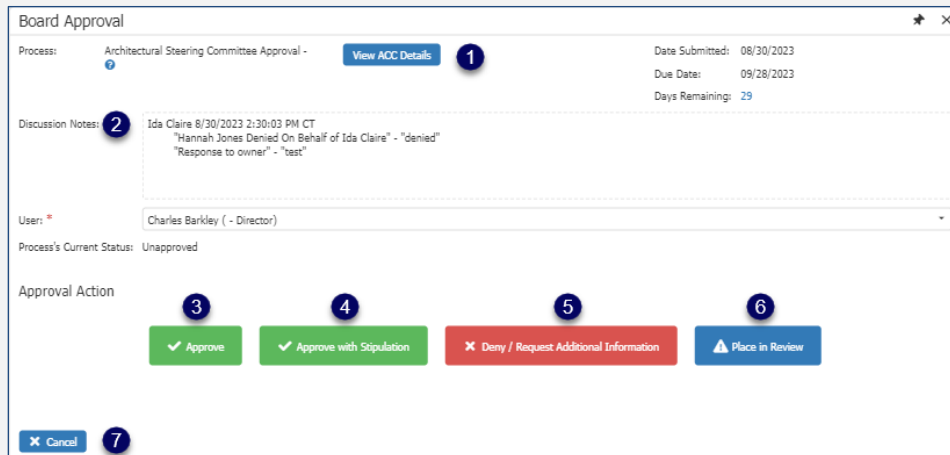


Figure 7: The Approval Window

1. **View ACC Details.** This opens to the Project View illustrated in Figure 6.
2. **Discussion Notes.** Any notes that have previously been made by any committee member will reflect here for review.

² Be sure to set your browser to always allow pop-ups from CiraNet.

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3. **Approval Action: Approve.** If the item is acceptable in full as presented, choose this option.
4. **Approval Action: Approve with Stipulation.** If the item is acceptable, but certain conditions need to be adhered to this will allow the user to add a clarifying note as to the condition(s) that must be met by the owner, which will be included in the communication back to that owner by the management team.
5. **Approval Action: Deny/Request Additional Information.** This works much the same way. If the item is unacceptable as presented, select this option and the same pop-up notepad will open requiring a note to be left as to why the request is being denied and, if applicable, what is needed for it to be re-considered.
6. **Approval Action: Leave in Review.** This essentially takes no action on the item.
7. **Cancel.** This allows you to close the window without taking any other action.

NOTE: We recommend that one committee member/approver oversee leaving the official response to owner comments only to avoid confusion on the part of the management team who need to take those notes and enter them into the final formal notice sent to the owners:

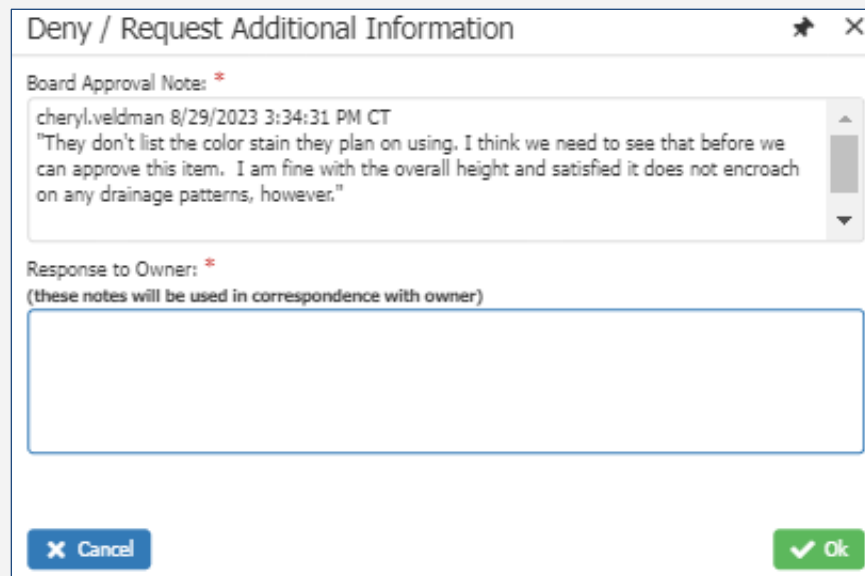


Figure 8: Example of Adding a Note to Deny an Item

NEW MULTIPLE SELECTION FEATURE! The new Management Portal can support actioning on multiple line items at once using the **Action For Multiple Selection** tool. The option is only available for one Process at a time, so use the filter to the process you wish to action on and using the check boxes at the far left-hand column, either click the box at the very top (to select all items) or check just the ones you wish to vote on and note that the button entitled Action For Multiple Selection will then be enabled. Click on it to open to the vote options and select the appropriate action.

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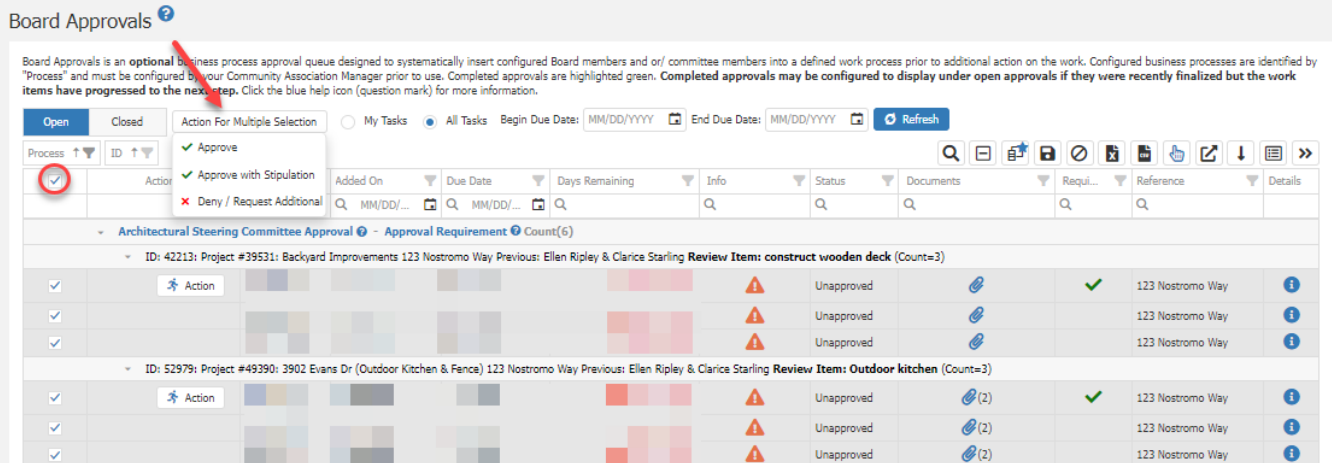


Figure 9: Using the Action For Multiple Selection Feature

Knowing When Requests Are Ready for Approval

Your management team undoubtedly processes applications as soon as they are received, so it is possible, depending upon your community's size and activity, that new applications will be ready for review daily. Your manager can enable an automatic email reminder if you so choose that will send an automated message to the email on file for you periodically. If they enable it for you, it can be set for any number of days that best suits your needs. Therefore, work with your management team on what would be the most convenient for you. Automated email reminders will come from [CommunityID]@ciramail.com, so if you believe you are not receiving emails and expect to, please check your Spam folder. Currently, the link to CiraNet that is included in the email is delivering you to the Classic Portal.

The inventory of items to review listed in the email reminders is based on the queue as of the early morning of that day. If you log in later in the day, you may find that items have been acted on by your fellow committee members and you will see those items, as indicated above, highlighted in green.

If you elect not to receive email reminders, we recommend checking your Board Approval page at least each workday.

It is important to note that anyone whose approval designation is Required must action on an item to move it forward. Without their vote, the record remains in queue, regardless of how many other committee members voted on the issue.

A Bit About Browsers

Working in the Cloud means you can access CiraNet no matter where you are or what computer you are using, but all browsers differ slightly and your use experience will as well, depending upon which one you select. CiraNet is supported on Chrome, Microsoft Edge, Firefox, and Safari, but you may use any browser that you are comfortable with and prefer. However, to enjoy the best user experience, make sure you are using an up-to-date version of your selected browser. Be mindful that if you are in a public setting, such as a coffee shop or in the airport, you are sharing your bandwidth with your fellow patrons, and it will impact the browser's efficiency. Other applications running at the same time on your browser, such as any streaming media application, will also slow down the application.

CiraMobile



CiraMobile is available for free download in the Apple App Store. The application is accessible on a tablet as well as an iPhone. Simply search for CiraMobile (spelled as a single word) or CiraConnect. (While there is an Android version of the mobile application, it does not support executive approvals currently.)

Approving pending applications through CiraMobile is based on the same basic approval/response principles as outlined for CiraNet above and the data is returned in the same manner, so there is no advantage or disadvantage to using one over the other, it is completely your preference!

Technical Support Tips

While we hope you do not, if you ever experience a technical difficulty with either CiraNet Portal, please try these preliminary self-help options to see if they will clear the issue:

1. Hard refresh (Ctrl+F5) the page to cause it to reload. Often that is all it takes to remove an impediment to the data loading correctly.
2. If it does not, however, try clearing your browser cache and cookies³
 - Instructions for Chrome: <https://support.google.com/accounts/answer/32050>
 - Instructions for Firefox: <https://support.mozilla.org/en-US/kb/how-clear-firefox-cache>
 - Instructions for Edge: <https://support.microsoft.com/en-us/help/10607/microsoft-edge-view-delete-browser-history>
 - Instructions for Safari: <https://support.apple.com/en-us/HT201265>

After you have done this, completely close the browser and start over with a new session. Log directly into CiraNet without using a bookmark, meaning simply type in "ciranet.com" into your browser and proceed to login from there. Sometimes if people use bookmarks or "recent website" link to access CiraNet, the link can include an old session ID which causes the browsing experience to be dramatically

³ The purpose here is to make sure you are loading the most up-to-date version of the platform. Old, cached data may be preventing any updates and recent bug fixes from loading for you.

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slower or takes you to an incorrect location within the platform.

NOTE: If you are worried about losing password information, please use the advanced options available in most browsers and uncheck the option to clear passwords.

If those steps fail, please let your Community Association Manager know right away. The following information will help us troubleshoot the issue and get you back in business as soon as possible:

1. Please walk us through the steps you took to navigate to the point of the error in as much detail as possible.
2. What is the error message you received, or describe the unexpected outcome you received?
3. Please provide a screenshot of the error if possible. **It is most helpful to snag the entire screen, including the URL search bar.** This allows us to see the error in context.
4. Please identify the environment you were working in. What we mean by that is please tell us if you were on a mobile device, PC, or a Mac, and the browser you were using. If you can identify the version of browser you were on and the zoom or magnification settings you are using, that is also great information.