

# ONLINE OPERATIONS MANUAL FOR REAL ESTATE MANAGEMENT CLIENT

BACKGROUND	The project initially started when the client wanted to convert their operations manual, a document already exceeding 500 pages, to a more organized form that their 60+ users could access via their company intranet via a folder structure similar to Microsoft <sup>®</sup> Explorer. The client wanted the existing content of the manual and forms edited to create a more consistent design layout and tone as content was updated and added.
	<ul> <li>As the years passed and the content in the manual grew, the client wanted to convert the operations manual, now over 650 pages in length, to a more user-friendly and searchable online system for their growing user base. The client requested the following design and functionality be available within the new online manual:</li> <li>The design and interface must be similar to the existing online manual and include simple navigation.</li> </ul>
	<ul> <li>The color scheme had to match existing company web pages.</li> <li>Searchable content.</li> <li>Alphabetical and numerical listing of over 250 forms/exhibits.</li> <li>Fillable forms for saving online or printing.</li> <li>Quarterly updates and new content highlighted on Home page.</li> <li>Access to archived content and quick reference guides.</li> <li>Training sessions and user guide explaining the new online manual functionality.</li> </ul>
AUDIENCE	Information gathered about the target audience: Most of the users had a beginner/intermediate computer level skill set and were comfortable with a simple navigation look and feel.
Solution	<ul> <li>Based on the client's requirements, I created the online operations manual using Adobe<sup>®</sup> RoboHelp and Acrobat to manage the design, content and fillable PDF forms. Using these tools made it possible to create and maintain a very user-friendly online manual, in addition to the following benefits and requested functionality.</li> <li>Searchable content throughout the whole online manual that includes chapter text for thirteen sections, forms/exhibits, appendices, archived content and quick reference guides.</li> <li>Alphabetically and numerically organized lists of forms/exhibits so the users can find the form/exhibit they needed in a timely manner.</li> <li>Created 250+ fillable forms for saving online or printing.</li> <li>Communicates new quarterly content changes on the Home page.</li> <li>Easy and cost-effective solution for making future quarterly updates.</li> <li>A user guide that explains how to use the new online manual.</li> </ul>



## PROJECT FILE ORGANIZATION

The organizational structure I used for the manual in Adobe<sup>®</sup> Robohelp.

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Exhibit 10-15: Service Information Sheet		Changed "Excel" refere	nce to "	Xcel"					
Exhibit 10-16: Notice of Intention to Evict in North Dakota									
- 2 Exhibit 10-17: Notice of Right to Reasonable Accommodation*		Exhibit Changes							
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Exhibit 10-19: Tenant Rights Notice*									
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# HOME/WELCOME PAGE

The view on the Home page consists of the table of contents, a link to the user guide, recent quarterly changes and the Search function.

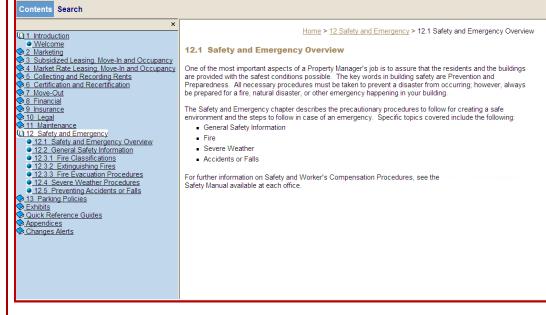
#### Contents Search U1 Introduction Welcome Z Marketing S Ubsidized Leasing. Move-In and Occupancy 4 Market Rate Leasing. Move-In and Occupancy 5 Collecting and Recording Rents 5 Collecting and Recording Rents 7 Move-Out Home > 1 Introduction > Welcome Welcome Online Operations Manual. For further Welcome to the information and questions on how to best utilize the features of the new layout, please read the Manual User Guide. 7 Move-Out Changes Alert - October 2010 8 Financial 9 Insurance The following changes were made to the online version of the Operations Manual in October 10 Legal 11 Maintenance 12 Safety and Emergency 13 Parking Policies 2010. These changes should be implemented immediately Text Changes Exhibits Chapter 3 Quick Reference Guides 3.3.1 #4: Information on requesting utility connection confirmation prior to move-in. Appendices If the report has an accept recommendation, then the application may be accepted Changes Alerts after approval by the Regional Property Manager. The applicant should be notified and the Letter of Acceptance-Subsidized (Exhibit 3-65) should be mailed to the applicant. This letter states that the applicant must connect any required utilities prior to move-in and confirm this information with the office. The Property Manager must follow-up with the resident prior to move-in to confirm that the resident has initiated the utility connection. Chapter 11 • 11.7.2: #4 Process for entering service requests for on-call work. All after-hours and emergency calls that are handled by a Maintenance Technician



# **ONLINE DESIGN AND LAYOUT SAMPLE**

### CHAPTER CONTENT AND VIEW PANE

Clicking on a chapter or exhibit link in the TOC navigation pane (left) displays the contents in the scrollable view pane (right).



## SEARCH FUNCTION

Clicking Search on the Home page launches the search function. Entering search criteria in the text box and pressing Enter on the keyboard displays search results below the search text box. Clicking on a link from the results displays the content in the view pane.

Contents Search	
	Welcome         Welcome to the       Online Operations Manual. For further information and questions on how to best utilize the features of the new layout, please read the         Changes Alert - October 2010         The following changes were made to the online version of the Operations Manual in October 2010. These changes should be implemented immediately.         Text Changes
	Chapter 3 • 3.3.1 #4: Information on requesting utility connection confirmation prior to move-in. If the report has an accept recommendation, then the application may be accepted after approval by the Regional Property Manager. The applicant should be notified and the Letter of Acceptance- Subsidized (Exhibit 3-65) should be mailed to the applicant. This letter states that the applicant must connect any required utilities prior to move-in and confirm this information with the office. The Property Manager must follow-up with the resident prior to move-in to confirm that the resident has initiated the utility connection.



# **ONLINE DESIGN AND LAYOUT SAMPLE**

### EXHIBITS (FORMS) ORGANIZED BY EACH CHAPTER NUMERICALLY

The exhibit number is the link that displays the fillable PDF form. The form opens in a new window allowing the user to fill in the form and then save or print the completed form.

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2 Marketing		by Chapter	
3 Subsidized Leasing, Move-In and Occ 4 Market Rate Leasing, Move-In and Oc		den die 10e van eeste die be 1990 waar wat 1700 ek te van Kana	
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6 Certification and Recertification	Chapter 2	: Marketing	
7 Move-Out	Exhibit		
8 Financial	Number	Exhibit Title	
9 Insurance	2-1	Marketing Report	
10 Legal	2-2	Guest Welcome Card	
11 Maintenance	2-3	Confidential Shopping Report*	
12 Safety and Emergency 13 Parking Policies	2-3	Daily Traffic and Prospect Log	
Exhibits	2-4		
Exhibits Alpha Sort		Weekly Traffic Summary Form (Removed this exhibit March 2008)	
Exhibits by Chapter	2-6	Availability Report (Removed this exhibit January 2008)	
Quick Reference Guides	0	Out-different of the sector Marcola and October 201	
Quick Reference Guides		Subsidized - Leasing, Move-In and Occupancy	
Appendices	Exhibit Number	man and a man	
Changes Alerts		Exhibit Title	
	3-1	MCC Rental Application	
	3-2	RHR Application (Removed this exhibit January 2008)	
	<u>3-3</u>	Rental Application for Subsidized Housing Assistance*	
	<u>3-3RD</u>	Rural Development Rental Application for Subsidized Housing Assistance	
	<u>3-4</u>	Resident Selection Criteria*	
	3-6	Owner's Notice Number 1	
	<u>3-7</u>	Family Summary Sheet	
	<u>3-8</u>	Declaration of Section 214 Status	
	<u>3-9</u>	Applicant Verification Consent Form	
	<u>3-10</u>	Documents Required Form for Noncitizens*	
	3-11	Request for Extension*	
	3-12	Owner's Notice Number 2	
	3-13	Option Sheet*	
	3-14	Owner's Notice Number 3 - Final Decision on Immigration Status	
	3-15	Waiting List (Removed this exhibit January 2008)	
	3-16	Waiting List Placement - Citizen	
	3-16RD	Rural Development Waiting List Placement	

#### EXHIBITS (FORMS) ORGANIZED ALPHABETICALLY

The exhibit title is the link that displays the fillable PDF form. The form opens in a new window allowing the user to fill in the form and then save or print the completed form.

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6 Certification and Recertification 7 Move-Out		Exhibit	
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≥ 9 Insurance	10-Day Notice of Abandoned Property (MN)	7-28	_
>10 Legal	14-Day Notice	7-6	
11 Maintenance	236 / Section 8 Lease Agreement	3-35	
12 Safety and Emergency	Access to Unit of Deceased Resident	7-18	
13 Parking Policies	Accident / Loss Investigation Report	9-2	
Exhibits Exhibits Alpha Sort	Accounts Payable (A/P) Coding Slip	8-1	
<ul> <li>Exhibits by Chapter</li> </ul>	ACH Opt-Out	5-9	
Quick Reference Guides	Alimony / Spousal Maintenance / Parental Support Verification	6-13	
Quick Reference Guides	"And Justice for All" Poster RD	10-26	
Appendices	Animal/Pet Policy Addendum for Market Rate Properties	4-14	
Changes Alerts	Animal/Pet Policy Addendum for Elderly and Disabled Properties	3-44	
	Animal/Pet Policy Addendum for Subsidized Family Properties and for	3-30	
	Assistance Animals Needed to Provide Accommodation for a Disability		
	Annual Recertification Checklist for Subsidized Properties	6-6	
	Annual Recertification Information	6-7	
	Annual Recertification Initial Notice	3-32	
	Apartment Turn-Over Checklist*	7-7	
	Applicant Verification Consent Form	3-9	
	Asset Verification	6-14	
	Balance Due Notice	5-12	
	Bedbug Extermination Procedures	11-22	
	Building Key Addendum - Market Rate Properties Only	7-26	
	Capital Expenditure Requisition	7-8	
	Certification for Qualified Long-Term Care Insurance Premium	6-31	
	Certification Questionnaire*	3-72	1
	Certification Questionnaire	6-5	7
	Check Request	8-7	1
	Child / Dependent Care Expense Verification	6-15	1
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### SAMPLE OF FILLABLE FORM (PDF)

The form opens in a separate window using Acrobat® Reader allowing the user to fill in, save or print the completed form.

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### LIST OF QUICK REFERENCE GUIDES

Clicking on a Quick Reference Guide opens the document.

<u>1 Introduction</u>		Home > Quick Reference Guides > Quick Reference Guides
<u>Welcome</u> <u>2 Marketing</u>	Quick Reference Guides	
<u>3 Subsidized Leasing Move-In and Operation</u> <u>4 Market Rate Leasing Move-In and Operation</u> <u>5 Collecting and Recording Rents</u> <u>6 Certification and Recertification</u>		
7 Move-Out	Quick Reference Guide Title	
8 Financial 9 Insurance	<ul> <li>Processing Applications at Subsidized Properties*</li> </ul>	
10 Legal	Collecting and Recording Rents*	
11 Maintenance	<ul> <li>Renewal Processing at Market Rate Properties*</li> </ul>	
12 Safety and Emergency 13 Parking Policies	Annual Certifications at Subsidized Properties*	
Exhibits		
<ul> <li>Exhibits Alpha Sort</li> <li>Exhibits by Chapter</li> </ul>	<ul> <li>Interim Certifications at Subsidized Properties*</li> </ul>	
Quick Reference Guides	<ul> <li>Verifications at Subsidized Properties*</li> </ul>	
Quick Reference Guides	<ul> <li><u>Reviewing Ending Balances*</u></li> </ul>	
Appendices Changes Alerts	Managing Facilities*	
	Move-Out Process*	
	<ul> <li>OneSite Monthly Tasks by Role*</li> </ul>	
	OneSite Property Review	
	OneSite Reports*	
	<ul> <li>OneSite Letters and Notices*</li> </ul>	
	<ul> <li>Application Criteria*</li> </ul>	
	<ul> <li>Student Income Calculation*</li> </ul>	
	Pet Policy Procedures*	



## TABLE OF CONTENTS FOR THE ONLINE MANUAL USER GUIDE

Clicking the Manual User Guide link on the Home page opens the Online Operations Manual User Guide.

