

# 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® 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.

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:

- The design and interface must be similar to the existing online manual and include simple navigation.
- The color scheme had to match existing company web pages.
- Searchable content.
- Alphabetical and numerical listing of over 250 forms/exhibits.
- Fillable forms for saving online or printing.
- Quarterly updates and new content highlighted on Home page.
- Access to archived content and quick reference guides.
- Training sessions and user guide explaining the new online manual functionality.

## 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.

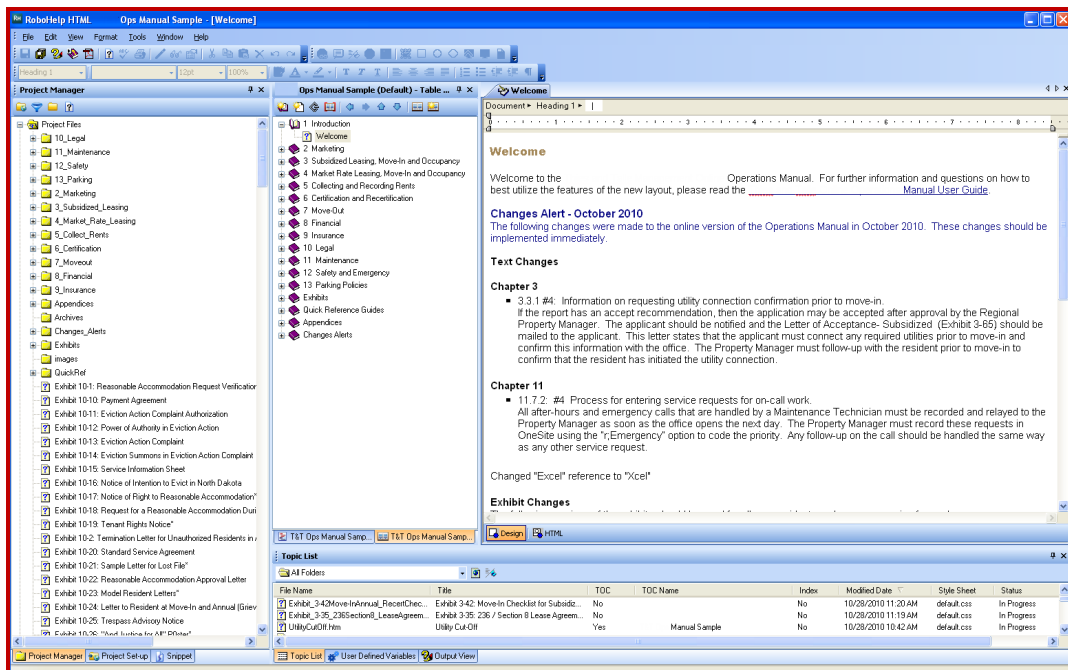
## SOLUTION

Based on the client's requirements, I created the online operations manual using Adobe® 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.

- Searchable content throughout the whole online manual that includes chapter text for thirteen sections, forms/exhibits, appendices, archived content and quick reference guides.
- Alphabetically and numerically organized lists of forms/exhibits so the users can find the form/exhibit they needed in a timely manner.
- Created 250+ fillable forms for saving online or printing.
- Communicates new quarterly content changes on the Home page.
- Easy and cost-effective solution for making future quarterly updates.
- A user guide that explains how to use the new online manual.

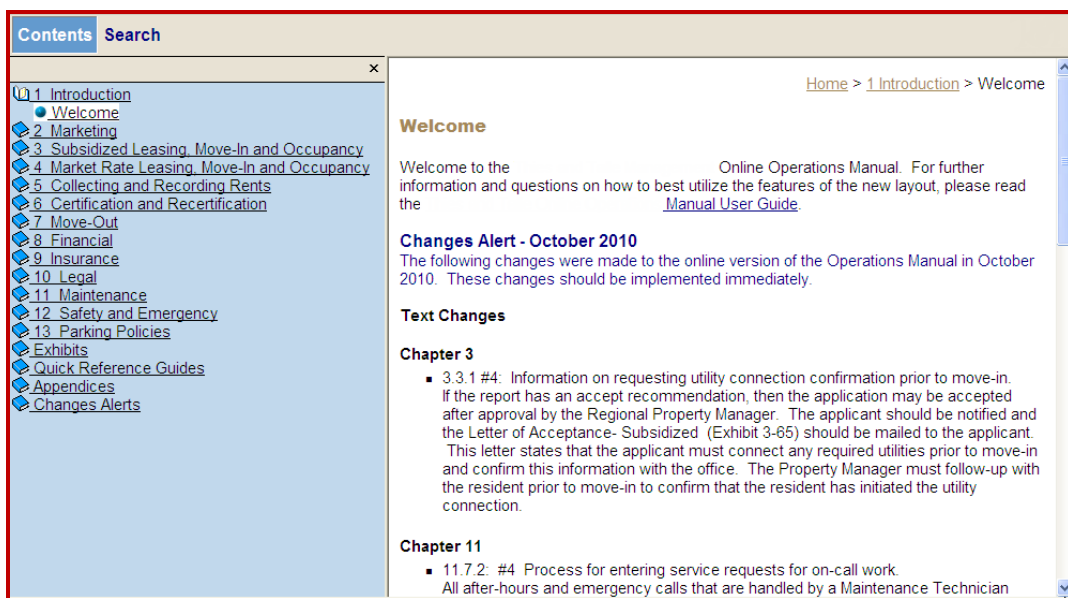
## PROJECT FILE ORGANIZATION

The organizational structure I used for the manual in Adobe® Robohelp.



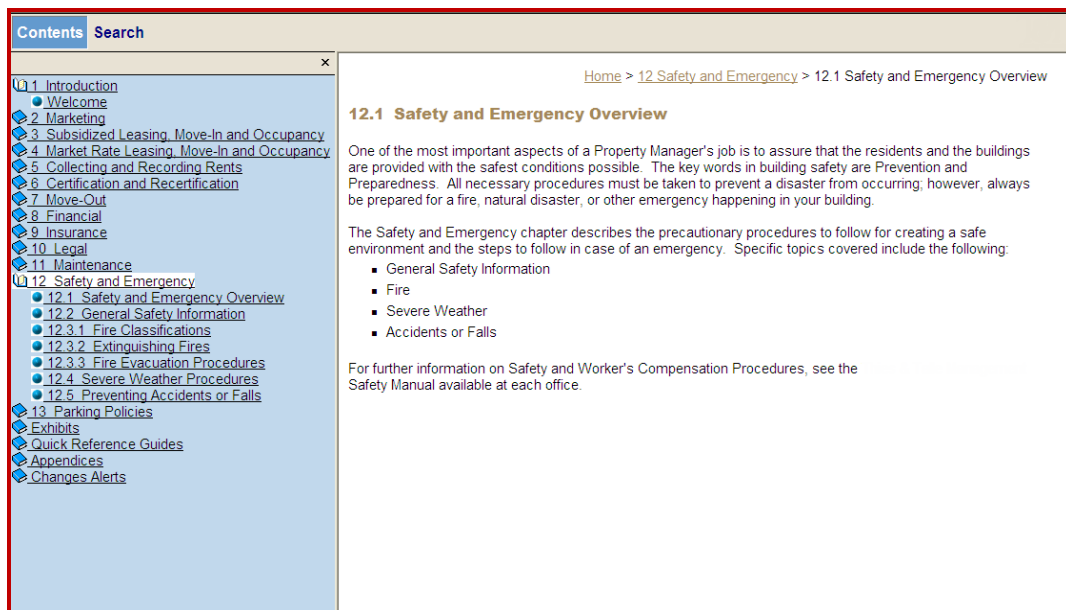
## HOME/WELCOME PAGE

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.



## 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).



**Contents** Search

Home > 12 Safety and Emergency > 12.1 Safety and Emergency Overview

**12.1 Safety and Emergency Overview**

One of the most important aspects of a Property Manager's job is to assure that the residents and the buildings are provided with the safest conditions possible. The key words in building safety are Prevention and Preparedness. All necessary procedures must be taken to prevent a disaster from occurring; however, always be prepared for a fire, natural disaster, or other emergency happening in your building.

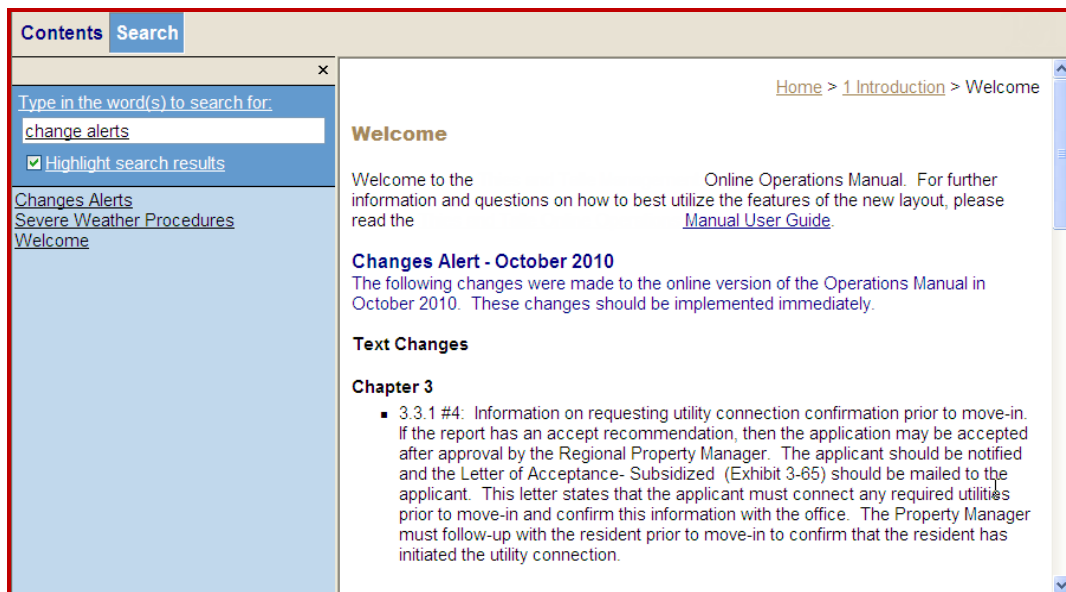
The Safety and Emergency chapter describes the precautionary procedures to follow for creating a safe environment and the steps to follow in case of an emergency. Specific topics covered include the following:

- General Safety Information
- Fire
- Severe Weather
- Accidents or Falls

For further information on Safety and Worker's Compensation Procedures, see the Safety Manual available at each office.

## 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

Home > 1 Introduction > Welcome

Type in the word(s) to search for:  
change alerts

Highlight search results

Changes Alerts  
Severe Weather Procedures  
Welcome

**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 [Manual User Guide](#).

**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.

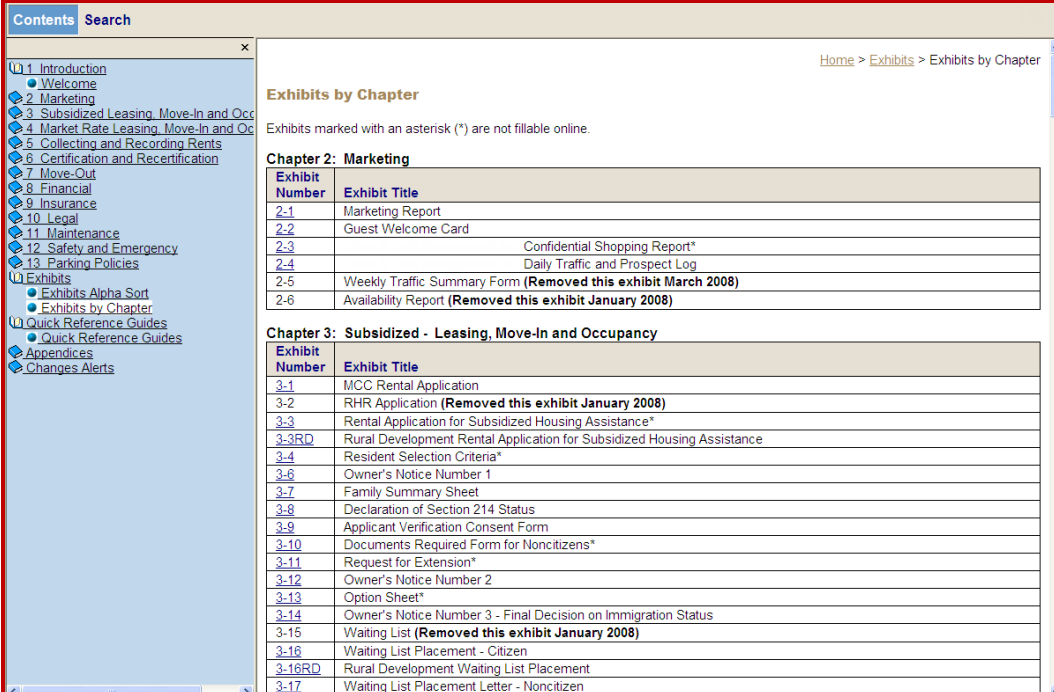
**Text Changes**

**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.

## 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.



Contents Search

Home > Exhibits > Exhibits by Chapter

**Exhibits by Chapter**

Exhibits marked with an asterisk (\*) are not fillable online.

**Chapter 2: Marketing**

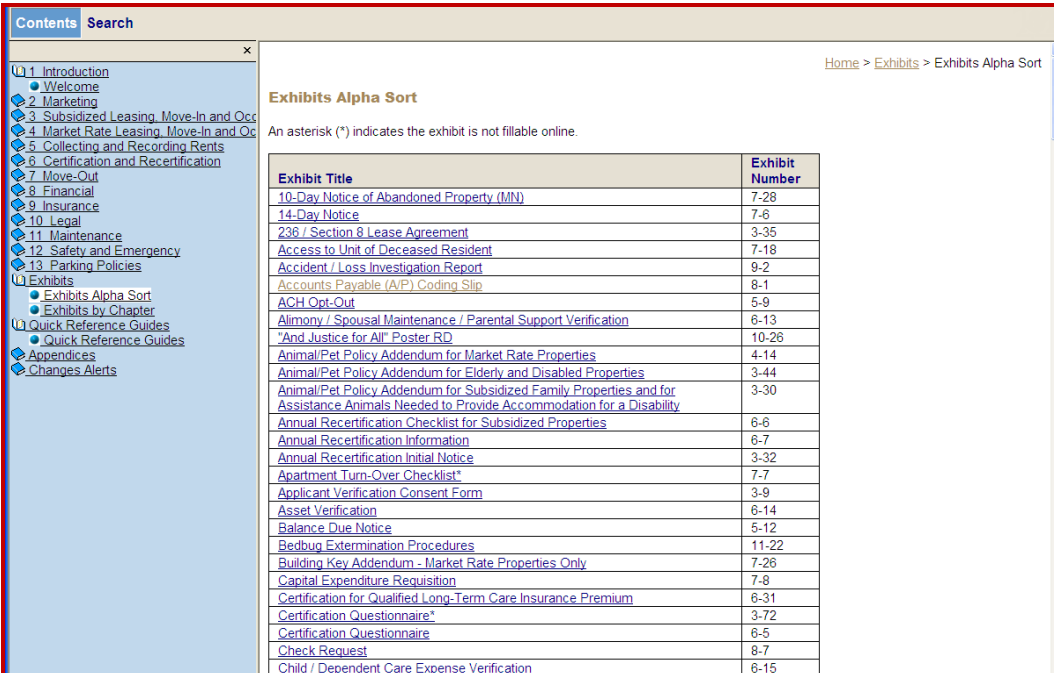
Exhibit Number	Exhibit Title
<a href="#">2-1</a>	Marketing Report
<a href="#">2-2</a>	Guest Welcome Card
<a href="#">2-3</a>	Confidential Shopping Report*
<a href="#">2-4</a>	Daily Traffic and Prospect Log
<a href="#">2-5</a>	Weekly Traffic Summary Form (Removed this exhibit March 2008)
<a href="#">2-6</a>	Availability Report (Removed this exhibit January 2008)

**Chapter 3: Subsidized - Leasing, Move-In and Occupancy**

Exhibit Number	Exhibit Title
<a href="#">3-1</a>	MCC Rental Application
<a href="#">3-2</a>	RHR Application (Removed this exhibit January 2008)
<a href="#">3-3</a>	Rental Application for Subsidized Housing Assistance*
<a href="#">3-3RD</a>	Rural Development Rental Application for Subsidized Housing Assistance
<a href="#">3-4</a>	Resident Selection Criteria*
<a href="#">3-6</a>	Owner's Notice Number 1
<a href="#">3-7</a>	Family Summary Sheet
<a href="#">3-8</a>	Declaration of Section 214 Status
<a href="#">3-9</a>	Applicant Verification Consent Form
<a href="#">3-10</a>	Documents Required Form for Noncitizens*
<a href="#">3-11</a>	Request for Extension*
<a href="#">3-12</a>	Owner's Notice Number 2
<a href="#">3-13</a>	Option Sheet*
<a href="#">3-14</a>	Owner's Notice Number 3 - Final Decision on Immigration Status
<a href="#">3-15</a>	Waiting List (Removed this exhibit January 2008)
<a href="#">3-16</a>	Waiting List Placement - Citizen
<a href="#">3-16RD</a>	Rural Development Waiting List Placement
<a href="#">3-17</a>	Waiting List Placement Letter - Noncitizen

## 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.



Contents Search

Home > Exhibits > Exhibits Alpha Sort

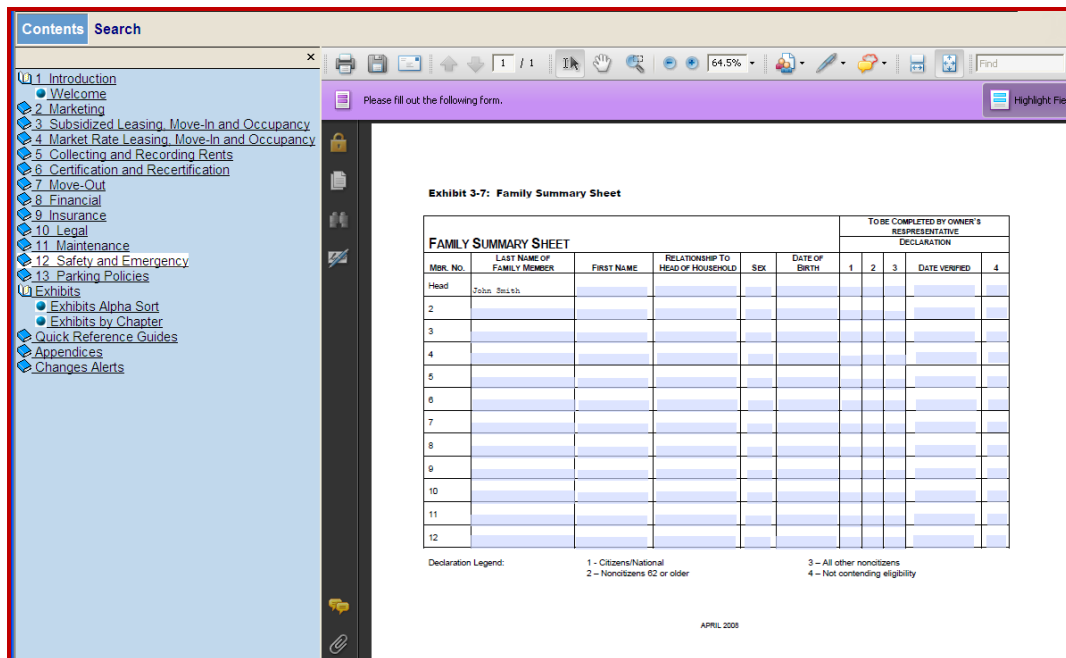
**Exhibits Alpha Sort**

An asterisk (\*) indicates the exhibit is not fillable online.

Exhibit Title	Exhibit Number
<a href="#">10-Day Notice of Abandoned Property (M/N)</a>	7-28
<a href="#">14-Day Notice</a>	7-6
<a href="#">236 / Section 8 Lease Agreement</a>	3-35
<a href="#">Access to Unit of Deceased Resident</a>	7-18
<a href="#">Accident / Loss Investigation Report</a>	9-2
<a href="#">Accounts Payable (A/P) Coding Slip</a>	8-1
<a href="#">ACH Opt-Out</a>	5-9
<a href="#">Alimony / Spousal Maintenance / Parental Support Verification</a>	6-13
<a href="#">And Justice for All' Poster RD</a>	10-28
<a href="#">Animal/Pet Policy Addendum for Market Rate Properties</a>	4-14
<a href="#">Animal/Pet Policy Addendum for Elderly and Disabled Properties</a>	3-44
<a href="#">Animal/Pet Policy Addendum for Subsidized Family Properties and for Assistance Animals Needed to Provide Accommodation for a Disability</a>	3-30
<a href="#">Annual Recertification Checklist for Subsidized Properties</a>	6-6
<a href="#">Annual Recertification Information</a>	6-7
<a href="#">Annual Recertification Initial Notice</a>	3-32
<a href="#">Apartment Turn-Over Checklist*</a>	7-7
<a href="#">Applicant Verification Consent Form</a>	3-9
<a href="#">Asset Verification</a>	6-14
<a href="#">Balance Due Notice</a>	5-12
<a href="#">Bedbug Extermination Procedures</a>	11-22
<a href="#">Building Key Addendum - Market Rate Properties Only</a>	7-26
<a href="#">Capital Expenditure Requisition</a>	7-8
<a href="#">Certification for Qualified Long-Term Care Insurance Premium</a>	6-31
<a href="#">Certification Questionnaire*</a>	3-72
<a href="#">Certification Questionnaire</a>	6-5
<a href="#">Check Request</a>	8-7
<a href="#">Child / Dependent Care Expense Verification</a>	6-15

## 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.



**Exhibit 3-7: Family Summary Sheet**

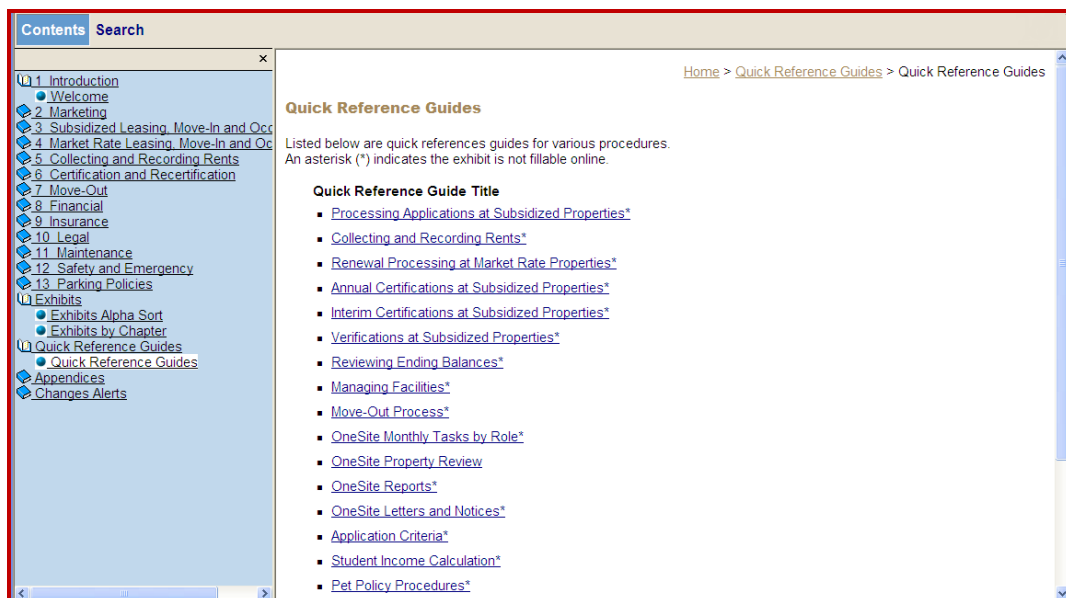
MR. NO.	LAST NAME OF FAMILY MEMBER	FIRST NAME	RELATIONSHIP TO HEAD OF HOUSEHOLD	SEX	DATE OF BIRTH	TO BE COMPLETED BY OWNER'S REPRESENTATIVE			
						1	2	3	DATE VERIFIED
Head	John Smith								
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									

Declaration Legend: 1 - Citizens/National  
2 - Noncitizens 82 or older  
3 - All other noncitizens  
4 - Not contesting eligibility

APRIL 2008

## LIST OF QUICK REFERENCE GUIDES

Clicking on a Quick Reference Guide opens the document.



**Quick Reference Guides**

Listed below are quick references guides for various procedures. An asterisk (\*) indicates the exhibit is not fillable online.

**Quick Reference Guide Title**

- Processing Applications at Subsidized Properties\*
- Collecting and Recording Rents\*
- Renewal Processing at Market Rate Properties\*
- Annual Certifications at Subsidized Properties\*
- Interim Certifications at Subsidized Properties\*
- Verifications at Subsidized Properties\*
- Reviewing Ending Balances\*
- Managing Facilities\*
- Move-Out Process\*
- OneSite Monthly Tasks by Role\*
- OneSite Property Review
- OneSite Reports\*
- OneSite Letters and Notices\*
- Application Criteria\*
- Student Income Calculation\*
- 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.

