Innovation Champion Project

Write and Centralize Manuals, Instructions and Guides for the Right-of-Way Section

Kahle Rhine
Project Team

• Innovation Champion
  – Kahle Rhine

• Testing & Review
  – Dana Box

• Editing and Proofreading
  – Serena Poteete & Michelle Lester
• There are only a few instructions sheets for the processes for Right-of-Way, and they are scattered throughout sub files on a shared server. Right-of-Way has a higher attrition rate and several of the current staff will be retiring within a few years. New employees will need training on the systems and an easily accessed source of information.
• Provide a manual and instructions for the Project Management software program and centralize current guides, manuals and instructions in a single, easily accessed location.
### Tools Used

- Microsoft Word and Access
- Adobe Acrobat

<table>
<thead>
<tr>
<th>File Name</th>
<th>Type</th>
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<tbody>
<tr>
<td>1 Invoice.pdf</td>
<td>Adobe Acrobat Document</td>
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<tr>
<td>2 Research Report.pdf</td>
<td>Adobe Acrobat Document</td>
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<tr>
<td>3 Right of Entry Doc.pdf</td>
<td>Adobe Acrobat Document</td>
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<tr>
<td>4 REPORT List of Your Active Projects.pdf</td>
<td>Adobe Acrobat Document</td>
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<td>5 Ind Project.pdf</td>
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<td>6 Comments All Report.pdf</td>
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<td>7 Amount Spent.pdf</td>
<td>Adobe Acrobat Document</td>
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<tr>
<td>8 SetUpChecklist.pdf</td>
<td>Adobe Acrobat Document</td>
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<tr>
<td>9 Parcel Comments.pdf</td>
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</table>

- ROW_be BackEndRESTRICTED_be2.accdb | Microsoft Access Database |
- ROW_be BackEndRESTRICTED.laccdb   | Microsoft Access Record-Linkage Database |
- ROW_be BackEndRESTRICTED_be2.laccdb | Microsoft Access Record-Linkage Database |
- ROW_be BackEndRESTRICTED.accdb    | Microsoft Access Database |
- Reports.accdb                     | Microsoft Access Database |
- ROW.accdb                         | Microsoft Access Database |
- Closing and Asset Manage.accdb    | Microsoft Access Database |
Improvements

- Centralized and easily accessed location for all the information.
- All Right-of-Way staff informed of the location increasing visibility.

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Rhine, Kahle

Instructions, Manuals & Guides

To: Leaer, Michelle, Polkite, SẠRAJ, BCI, Sane, Haddish, Stine, Jones, Courtyard, Palla, Angelica

All,

I have written a comprehensive manual for the ROW Access database. I have also collected and centralized all the guides, instructions and manuals I could find into one location.

The folder is located under L-Padets/Instructions, Manuals, Guides.

Please feel free to look at the information and add any documents you may have saved. I will go through them at a later date and eliminate all the obsolete stuff.

Thanks,

Kahle
Project Outcomes

• Identified, found and centralized more guides, manuals and instructions than was previously known.

• Wrote a comprehensive manual for the daily utilized Project Management software including examples of commonly used reports, forms and documents.
Centralized collection of guides and lists. 25 were found and collected.
• Every file in shared directory was manually searched for guides, charts or instruction documents.
• Right-of-Way staff was asked to provide any missing information they had saved into the central file.
Project Outcomes - Manual

City of Tulsa: Engineering Services: Right-of-Way

Project Management Access Database

This document contains information and instructions for the Project Management database specifically created for the City of Tulsa, Right-of-Way Section. The database is comparable to off the shelf commercial software currently utilized by various Governmental and Private entities.

Basic Information and Parts of the Database

BASIC INFORMATION

This document provides users information about the purpose of the ROW Access database and the location of information. It consists of three parts: 1) Forms are used to enter and view data; 2) Queries are used to gather and sort this data; and 3) Reports are used to display the data in a visually usable way. Users modify queries and reports, and each update permanently overwrites all changes. New queries and reports can be created by the administrator for use by the ROW group.

The database auto-opens into the Storefront tab. This tab contains the three parts sorted and labeled into easily accessible tabs:

Open a Form contains the means to enter general project data, enter specific project information, easily fill out and print an Invoice Cover Sheet, and track RFA’s and invoices. It also allows tracking of research requests.

Open a Query contains several pre-assembled queries to upload and sort information found on the forms. These pre-coded queries contain the information most frequently used by the ROW group.

Run a Report contains the corresponding reports to the pre-assembled queries.

PARTS OF THE DATABASE

- Basic Information: Pg. 1
- Parts of the Database
  - Open a Form: Pg. 1
  - Open a Query: Pg. 2
  - Run a Report: Pg. 3
- Tabs Within Forms
  - Parcel Tab: Pg. 3
  - STR IDP CTC Onsite Tab: Pg. 4
  - Surplus Tab: Pg. 5
  - Land Legacy Tab (aka Conservation Easements): Pg. 5
  - Ordinance Tab: Pg. 5
  - Lease Tab: Pg. 5
  - TDA Tab (aka Tulsa Development Authority): Pg. 5
  - MacOS-Open Records Tab: Pg. 5
How To

Search for a Project

- Choose "General Project" tab
- Highlight "Project Number" OR "Project Name" field
- Click the Find option (magnifying glass) OR Click in the Search box on the bottom toolbar
- Enter in information for searching
- If using Find magnifying glass, change Match pull down to "Any part of Field"
- If using the search box, the search must be exact

Reports

Print a list of your Projects, including status notes

- Step 1. Open "Report for Project List" tab under "2. Open a Query"
  - Change the name in the ROW Agent column and Criteria row. The name must be in quotations and exactly as it recorded under the General Project tab
  - Click the red exclamation point labeled Run in the top toolbar
  - Save the document
  - Close the tab with the X on the top right
• The manual went through five revisions and editing.
• Dana tested each step 2-3 times and suggested edits such as adding screenshots and arrangement of information.
• Serena reviewed for formatting and suggested a layout change.
• Michelle reviewed and edited grammar and recommended a descriptive title page.
Future Items

- Write instructions for processes in MUNIS.
- Eliminate guides for obsolete software.
- Verify all information reflects current policies and practices.