

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

Problem Statement



- 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.

Project Overview

























- 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

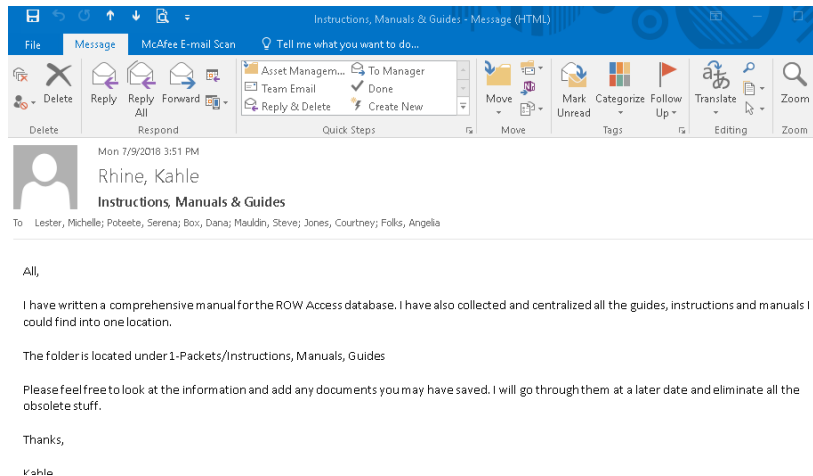
 1 Invoice.pdf	Adobe Acrobat Document
 2 Research Report.pdf	Adobe Acrobat Document
 3 Right of Entry Doc.pdf	Adobe Acrobat Document
 4 REPORT List of Your Active Projects.pdf	Adobe Acrobat Document
 5 Ind Project.pdf	Adobe Acrobat Document
 6 Comments All Report.pdf	Adobe Acrobat Document
 7 Amount Spent.pdf	Adobe Acrobat Document
 8 SetUpChecklist.pdf	Adobe Acrobat Document
 9 Parcel Comments.pdf	Adobe Acrobat Document
 2018-07-06_123329.jpg	JPG File
 Access ROW Instructions.docx	Microsoft Word Document
 Access ROW Instructions.pdf	Adobe Acrobat Document
 GPI.jpg	JPG File
 Info About Revised.docx	Microsoft Word Document
 Info About.docx	Microsoft Word Document

 ROW_be BackEndRESTRICTED_be2.accdb	Microsoft Access Database
 ROW_be BackEndRESTRICTED.laccdb	Microsoft Access Record-L...
 ROW_be BackEndRESTRICTED_be2.laccdb	Microsoft Access Record-L...
 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.



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.

Project Outcomes - Centralize



Public > 1-PACKETS > Instructions, Manuals, Guides			Search Instruction
Name	Date modified	Type	
AbandoningPrivatization W&S Lines2.pdf	4/5/2017 8:23 AM	Adobe Acrobat D...	
Access Project Management Manual.pdf	7/9/2018 2:53 PM	Adobe Acrobat D...	
ACQUIRING RIGHT OF WAY.docx	4/28/2015 3:25 PM	Microsoft Word D...	
APPEAL PROCEDURE.doc	3/20/2001 3:55 PM	Microsoft Word 9...	
Attaching Parcel Analysis to Map pages...	12/15/2014 12:05 ...	Microsoft Word D...	
Basic Access Instructions.docx	8/5/2015 12:12 PM	Microsoft Word D...	
Extra Instructions.pdf	9/9/2015 9:23 AM	Adobe Acrobat D...	
GENERAL PROCESS CONDEMNATION.pdf	9/15/2011 3:32 PM	Adobe Acrobat D...	
General Process for Disposition of Surplu...	6/26/2009 10:42 AM	Microsoft Word 9...	
General Process ROW Acquisition 072108...	4/20/2009 11:58 PM	Adobe Acrobat D...	
GENERAL PROCESS--voluntary-REV-July ...	7/21/2008 2:18 PM	Microsoft Word 9...	
ICMA Presentation 12.18.13.pptx	1/12/2017 4:36 PM	Microsoft PowerP...	
Internal Procedure for Nuisance Abatem...	6/14/2007 2:22 PM	Microsoft Word 9...	
JEFF-StepsForClosings-CH-6-22-09.pdf	6/22/2009 4:20 PM	Adobe Acrobat D...	
OUTLOOK MANAGE RULE FOR OPEN RE...	10/28/2016 11:20 ...	Microsoft Word D...	
Outlook2007TrainingSlides.pdf	3/2/2011 10:34 AM	Adobe Acrobat D...	
Post Closing Instructions.docx	9/4/2015 3:29 PM	Microsoft Word D...	
Procedure for Advertising.doc	1/20/2011 9:22 AM	Microsoft Word 9...	
Purposes 1099 Reporting.doc	5/7/2010 12:05 PM	Microsoft Word 9...	
Quick Guide to ROW Legals Rev1.pub	4/25/2011 4:54 PM	Microsoft Publish...	
Right of Entry Instructions.docx	9/9/2015 9:24 AM	Microsoft Word D...	
ROW Acquisition process.doc	10/17/2011 3:05 PM	Microsoft Word 9...	
Sharepoint User Guide.docx	7/2/2014 3:23 PM	Microsoft Word D...	
Storm Water.xlsx	7/22/2014 2:03 PM	Microsoft Excel W...	
SURPLUS FLOW CHART.pdf	7/18/2017 11:25 AM	Adobe Acrobat D...	
WL Abandonment2016.pdf	9/19/2016 3:43 PM	Adobe Acrobat D...	

Centralized collection of guides and lists. 25 were found and collected.

Project Outcomes - Centralize



- 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.

Index

BASIC INFORMATION AND 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 Onsie 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

Macs-Open Records Tab: Pg. 5

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

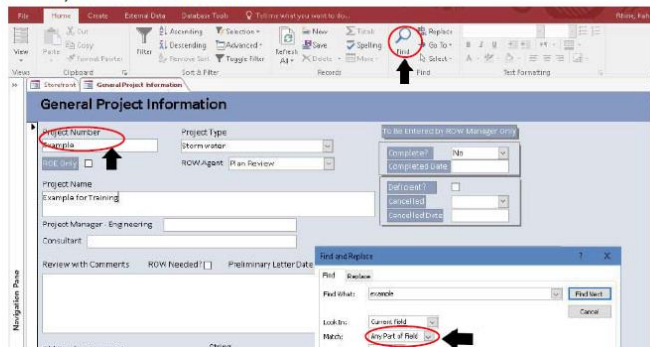
Project Outcomes - Manual

How To

SEARCH

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

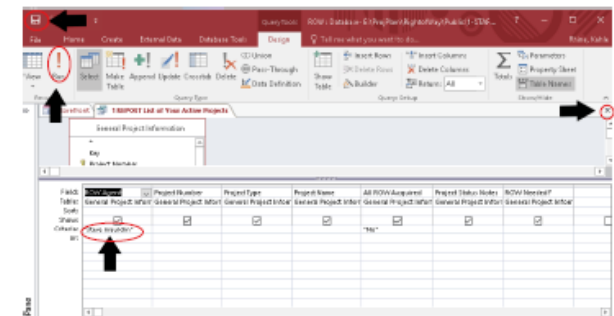


The screenshot shows the 'General Project Information' form. The 'Project Number' field is highlighted with a red circle. The 'Find' button (magnifying glass) is also highlighted with a red circle. In the 'Find and Replace' dialog box, the 'Match' dropdown is set to 'Any Part of Field' and is also highlighted with a red circle.

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 screenshot shows the 'Report for Project List' tab. The 'Run' button (red exclamation point) is highlighted with a red circle. The 'Criteria' row in the table is also highlighted with a red circle.

Project Outcomes - Manual



Right-of-Way Payment Routing

Date: 6/19/2018

Copy To: Brent Stout

From: Kahle Rhine

Project Number: 966120

Project Name: Gilcrease West, I-44 to Edison

Old Account Number:

String: 966120.LandOrig.5411101.5311

Org: 25013122

Object: 541102

Vendor: Bart James

Vendor Number: 1239 Vendor PO Number: 181611

Invoice Number: CT-UFS-1v Date Received: 5/24/2018

Amount: \$300.00

Parcel: 1309

Research Report Kahle Rhine

Assessor No	Property Address	Request From	Request Received	Reason of Request
		Luke Aziere	8/24/2017	List of Properties
Notes: Wanted the complete list of COT owned properties to use to track illegal dumping. Sent the list with all Authorities removed. Also sent County assessors and Permit center map. Explained the difference between properties and ROW				
41750-93-07-17280		Chris Kovac	8/22/2017	Research
Notes: Attempted to determine acquisition method of the property. Unable to find. County land records were not scanned far enough back. C Sharepoint, but no purchase records available. Advised Chris to purchase a property report or go check land records at the court house, doesn't have the funding or need for property report.				
	201 W 5th St	Matt Liechti	9/6/2017	Is the alley closed?
Notes: According to the Assessor's map, the alley is open. Tulsa County land records site was under maintenance so it c verification. Matt was satisfied with the answer provided.				
		Chris Kovac	9/13/2017	Find an Ordinance pertaining to plan
Notes: Specific to signs and located in the Zoning code. Ordinance 22205, modified with 236688. Located at Title 42, C provided reference to setback requirements in section 90.090-A				
12550-93-21-07140		Kovac	10/2/2017	
Notes: Asked to verify COT ownership due to citizen interest in the parcel. Advised it appeared to have multiple adjoin through Surplus and auction. If citizen wished to proceed, told to contact Kristi.				
		Chris Kovac	12/6/2017	Needs deed printed from County Site
Notes: Needs deed printed, but County site is offline. Will periodically check and print.				
	2505 W 66th St N	John McCulloch	1/25/2018	Wants to buy property in Osage Court
Notes: Lumpkin Park. It is to be retained as a nature preserve, as was deeded to the City via a Will in 1975. Accepted I				

Right of Entry

The undersigned, being the Owner of record of the property described below, does grant to the City of Tulsa, Right of Entry onto the said property for the purposes hereinafter set forth.

Part of Part of Lot 1, Block 1, AIRPARK DISTRIBUTION CENTER ADDITION

The employees, Agents, or Contractors representing the City of Tulsa, shall be permitted the right to enter upon the above described property to perform:

Set-Up Checklist

Project Number: 054053

Project Name: 91st, Mingo Road to Memorial Drive

Parcel #: 04.0 Parcel Address: 8555 E. 91st Street

Project Manager: Patty Parks ROW Agent: Angelia Folks

File Maintenance Set-Up:
Left from Bottom: Right from Bottom:
Main Info: Invoice: Legal Desc:
Closing: Filed Docs: Approval: Correspondence:

equipment
he premises

Take: Yes

Property Report Rcvd:

Owner Name: Calvary Bible Church, Inc.

Condo/Dec. Unit Ownership: ☐ Yes ☐ No Is our Take part of the Common Area? ☐ Yes ☐ No

Abstract Ordered Date:

Liens / Mortgages: ☐ Yes ☐ No

Judgements: ☐ Yes ☐ No

Requirements: ☐ Yes ☐ No

Easements affecting Title: ☐ Yes ☐ No Is there a Mutual Access Easement? ☐ Yes ☐ No

Appraiser:	Valbridge	Appraised Amount:	\$4,210.00	
On-Site Items	In Existing ROW	In New ROW	Appraisal \$ Comp	How will this be addressed?
Mailbox	<input type="checkbox"/>	<input type="checkbox"/>		
Landscaping	<input type="checkbox"/>	<input type="checkbox"/>		
Sign	<input type="checkbox"/>	<input type="checkbox"/>		
Trees	<input type="checkbox"/>	<input type="checkbox"/>		
Fence	<input type="checkbox"/>	<input type="checkbox"/>		
Driveways	<input type="checkbox"/>	<input type="checkbox"/>		
Other Items	<input type="checkbox"/>	<input type="checkbox"/>		

ROW Project

Angelia Folks

Project Number: 104017-AA

Project Name: N 36th St & Lewis Ave Intersection

Pa

Parcel #	Owner Name	Acquisition Status	Pending Engineering Issues	Utilities Needed?	Contact History with Owner	1st Offer \$	Owner Counter	Non-Res
1.0	Midwestern Salvage, Inc.	Condemned		No	Patty says to hold as of 6.10.14 due to predevelopment application. Email of 9/22/14 says to condemn. Brian Curthoys.		or \$	
2.0	Richard E. Drane, Jr., et al	Closed		No	3.11.14 - P/C, would City consider buying entire lot? 9/12/14 - Spoke with attorney at DHS...said will waive the lien for this parcel. Sent legal description and the first few pages of the TO.			
3.0	Greenfield Environmental Multistate Trust, LLC	In Condemnation		Yes	Numerous phone calls and emails between Erica Menard, Angelia and Michelle.			
4.0	Joseph W. Johnson, II	Closed		No	10/2/14 - Wants more money. Will provide me with fence costs. 12/16/14 - Never received anything. Sending f/up. Will start condemnation first week of Jan. Signed but Gap found lien. Has been released by LBN but release mailed to him. Letter of 2/12/15 asking him to call me and I would come and get the release and file it. 4/23/15 - called to say I have check, see him Monday at 10:00.		Paid 4	
5.0, 5.1	Quinton, et al	Condemned		No	Joel is representative with Cherokee Nation Real Estate Services, in Tahlequah. He is attempting to get a ROE for all three parcels. All 11 owners live out of state. 3 are restricted.			

Condemnation Case Number:	Amount Awarded:
1099 Information:	
Owner Fed ID #1	\$ Paid for Fee \$0.00
Owner Fed ID #2	\$ Paid for Perm ESMT \$0.00
Owner Mailing	\$ Paid for Temp ESMT \$0.00
Address	\$ Paid for Cost to Cure \$0.00
	\$ Paid for Damages \$0.00
Date Filed	\$ Paid for Self Move \$0.00
Instrument #	Total \$ Paid

Most Recent Legal Description Date: 4/24/2014

Notes:

Project Outcomes - Manual



- 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.