

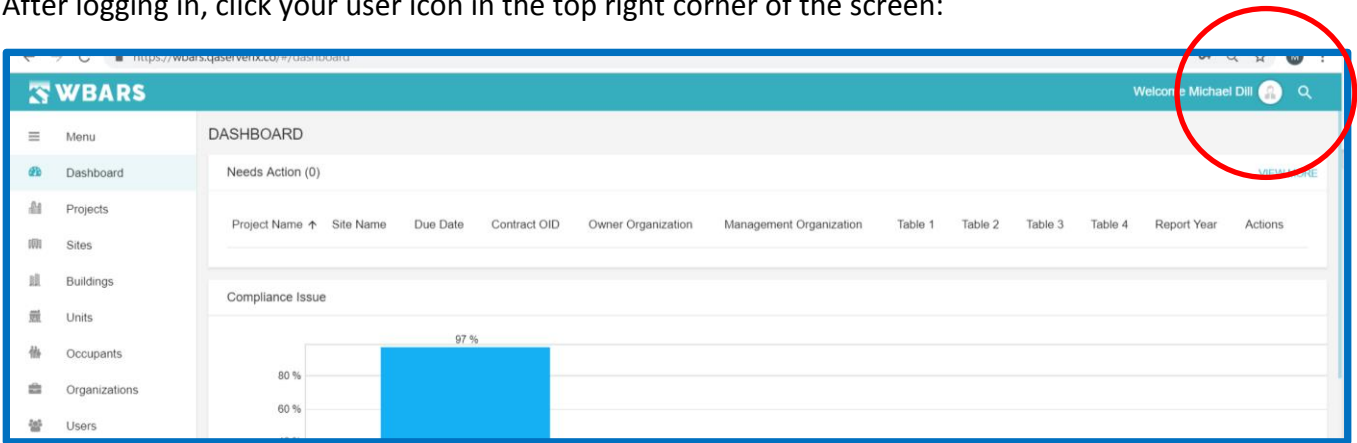
WBARS 2.0 CONTRACTOR USER QUICK GUIDE

MAY 2019

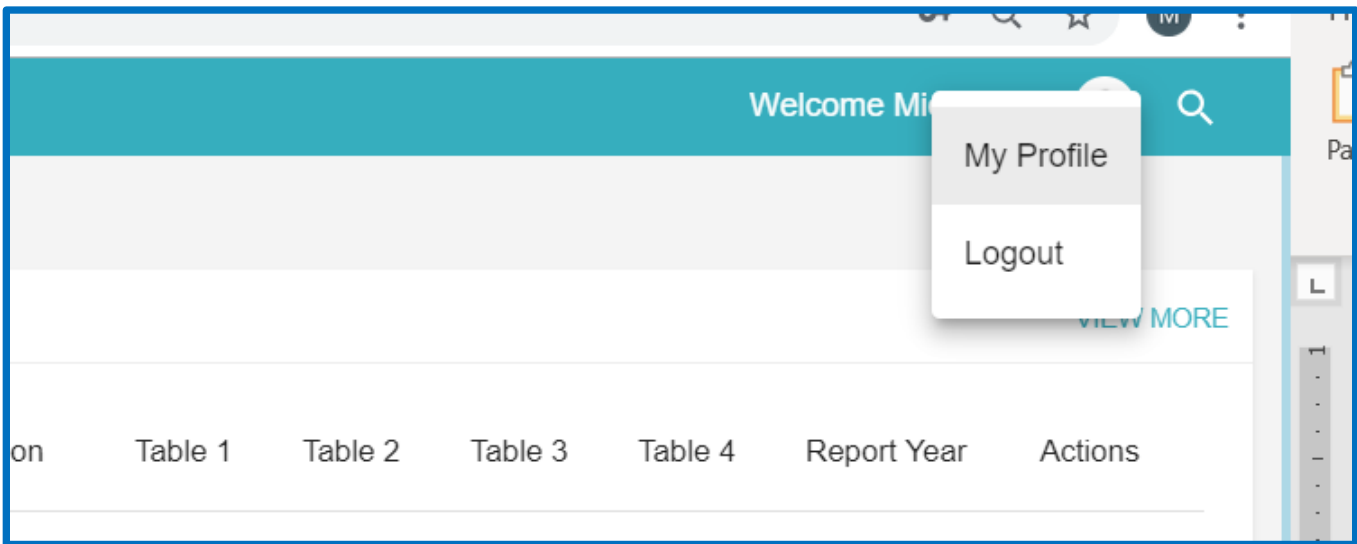
This quick guide goes over the most common functions used by Contractor staff users (Property and Onsite Managers, Owner Contacts) in WBARS. For a more detailed description of all WBARS 2.0 modules and functions, please open the **Help** module in WBARS and review the more comprehensive **User Guides** prepared by our developer and by WSHFC.

How do I see a list of properties that I am the contact for?

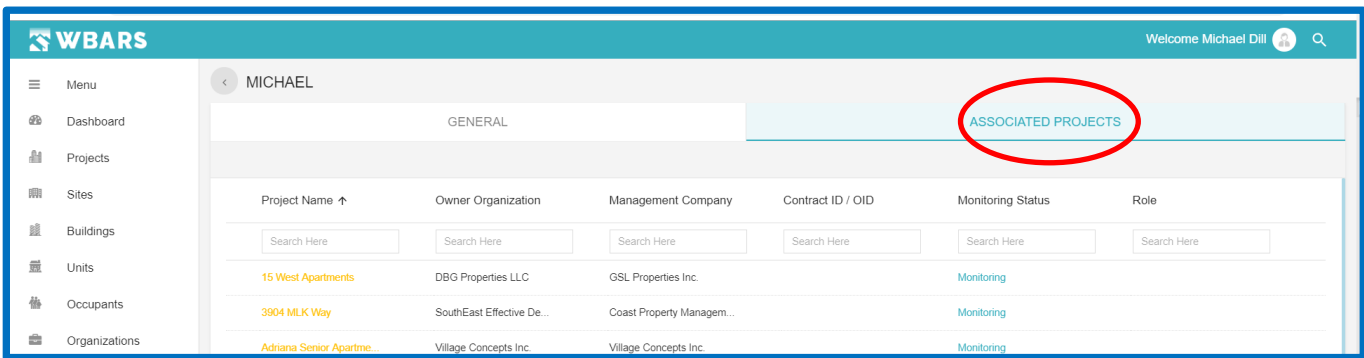
After logging in, click your user icon in the top right corner of the screen:



Click on **My Profile** – this will open your user contact record



On your contact record, click the **Associated Projects** tab

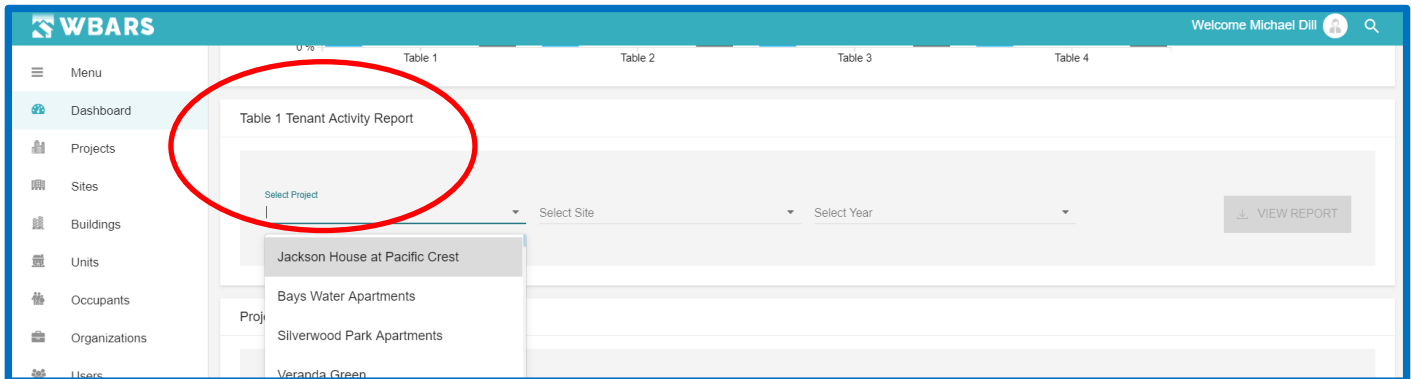


Projects where you are named as the Owner, Property Manager, or Onsite Manager will be displayed on screen. Click on the **Project Name** to open any project's detail record:

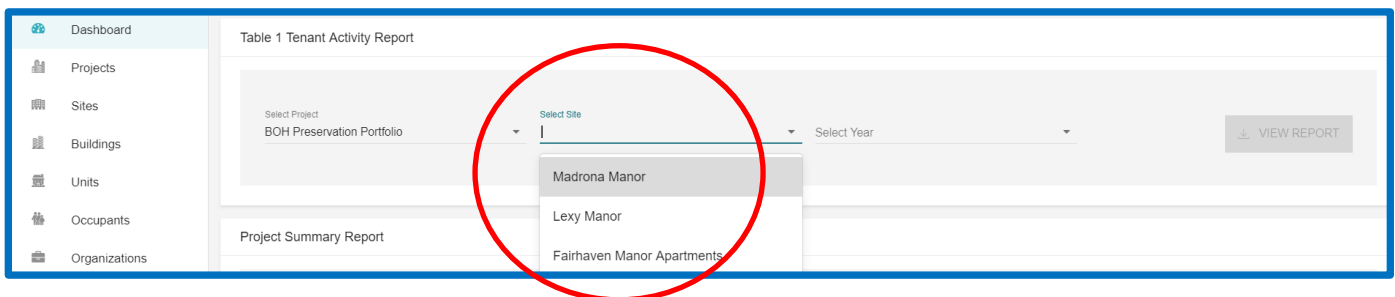
GENERAL		ASSOCIATED P
Search Here	Search Here	Search Here
15 West Apartments	DBG Properties LLC	GSL Properties Inc. Monitoring
3904 MLK Way	SouthEast Effective De...	Coast Property Managem... Monitoring
Adriana Senior Apartme...	Village Concepts Inc.	Village Concepts Inc. Monitoring
Andrew's Arms	Imagine Housing	FPI Management, Inc. 2-90-410-49 Monitoring
Arbor Park Apartment H...	Hearthstone Housing Fo...	Peak Living Monitoring
Arrowhead Gd	Arbor Park Apartment Homes Housing Corporati...	Senior Housing Assista... Monitoring
Athene	Imagine Housing	Quantum Residential In... 15-94110-019 Monitoring
Aurora Supportive Hous...	Downtown Emergency Ser...	Downtown Emergency Ser... Monitoring

I want to print a Table 1 report for a project.

Scroll down your Dashboard page to the Table 1 Tenant Activity Report section. In the **Select Project** field, either click the dropdown arrow or start typing a project name in the field to choose the appropriate project:

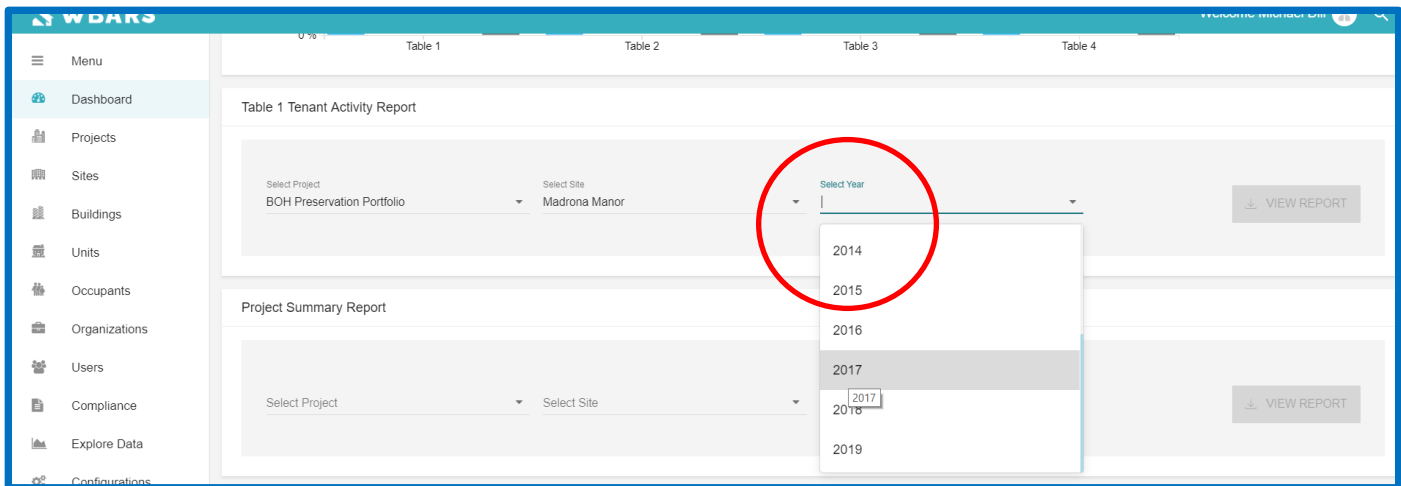


If you wish to see only a certain Site at a project, click the dropdown arrow in the **Select Site** field to choose the specific Site name:

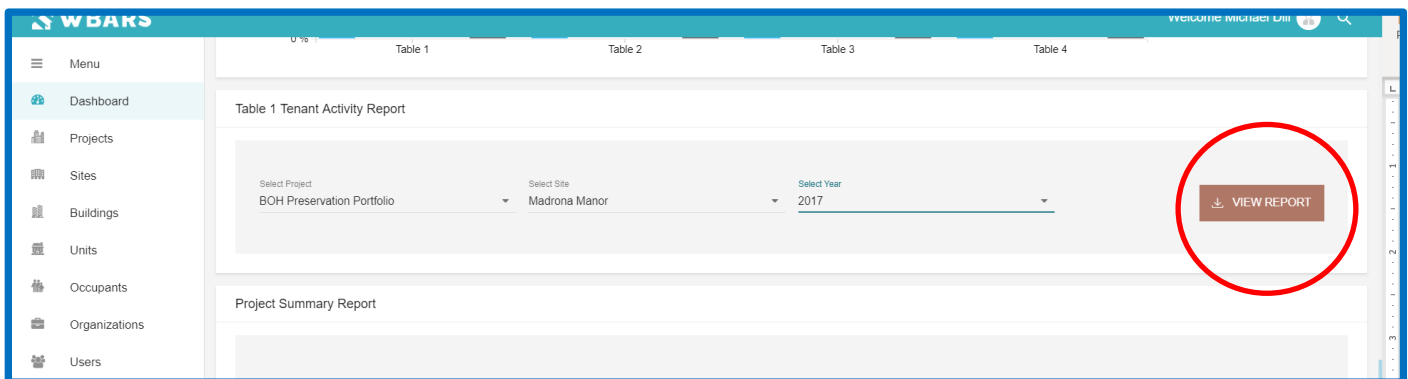


If you want a Table 1 export that includes all the Sites at a project, leave the Select Site field blank.

Click the dropdown arrow in the Select Year field to choose the reporting year you want to see data for:



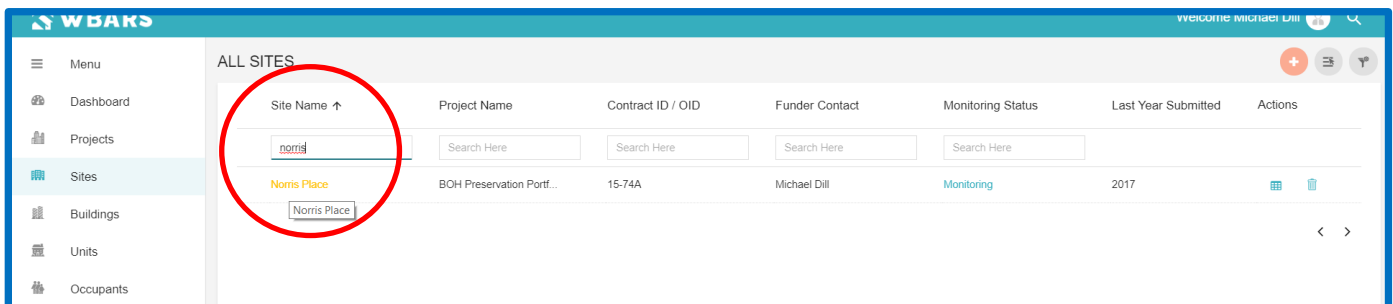
Then click the orange **VIEW REPORT** button to download the Table 1 report. After downloading the report, you can save it to your computer or you can print it out.

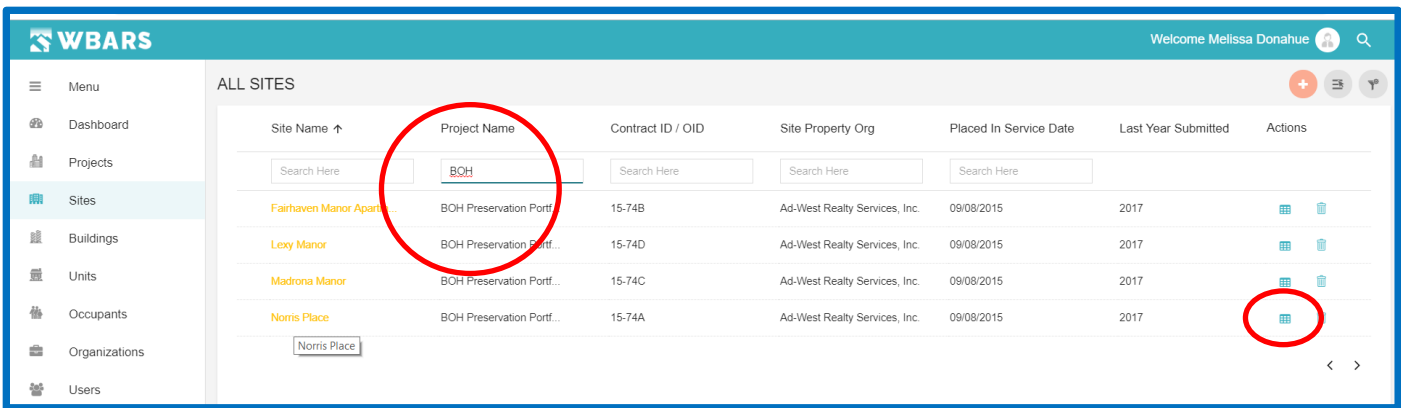


Note that you will also be able to download an **Annual Report Summary** export in the Project Summary Report section, using the same process.

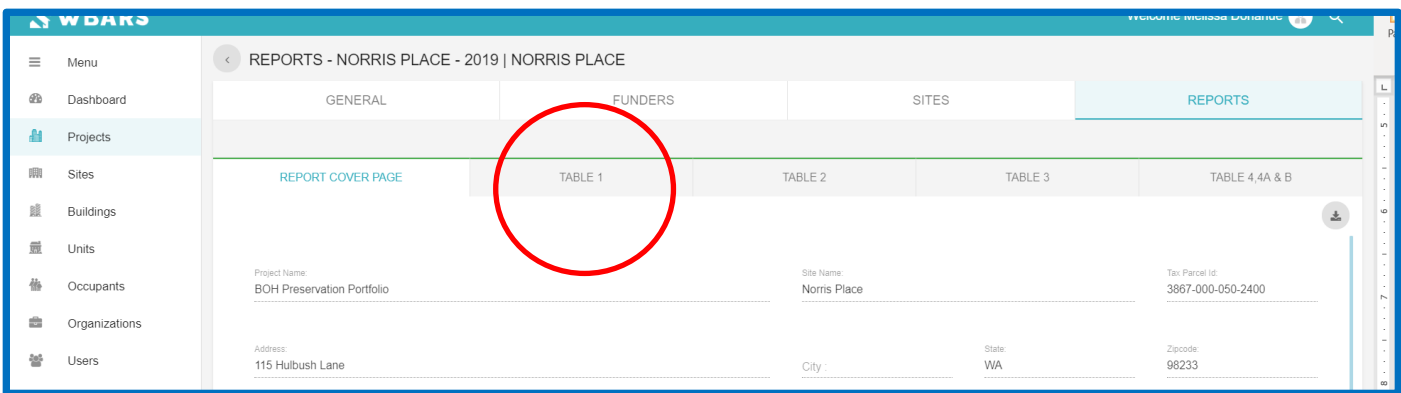
How do I get to the current year Table 1 report?

The quickest way to access the current year Table 1 report is by clicking the **Sites** module, then typing in a Site name in the **Site Name** field (or a Project name in the **Project Name** field):



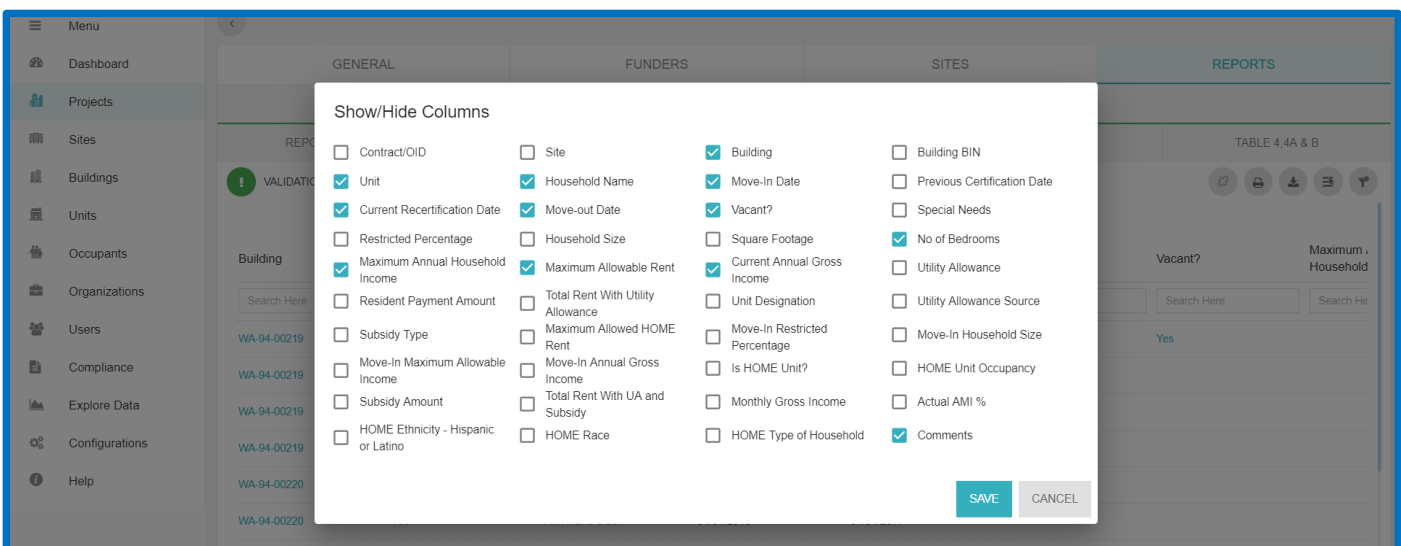


When WBARS returns your Site record, click on the grid icon under the **Actions** column at the far right, this will jump you to the current reporting year's Table report tabs (see grid icon in screen shot above). Then click on the Table 1 tab:



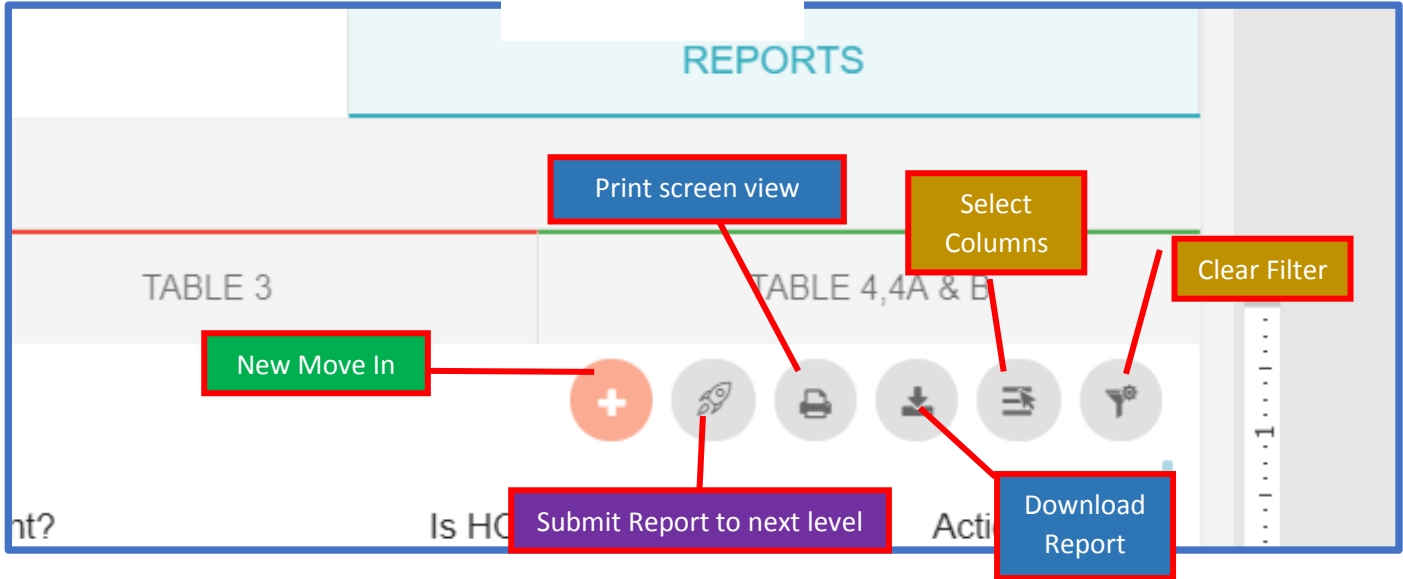
How do I change which Table 1 columns I see on screen?

At the top right of the table, click the **Select Column** icon and click on the fields you wish to see onscreen. Uncheck any columns you wish to hide from view. Click **SAVE** to save your edits. As in the previous system, you'll have to scroll back and forth onscreen to view all the columns displayed.



Where's my New Move In button?

As in the previous system, you can create a New Move in record from the current year Table 1 list view. The New Move in button is the orange plus sign in the top right area of the screen.



And my Transfer button?

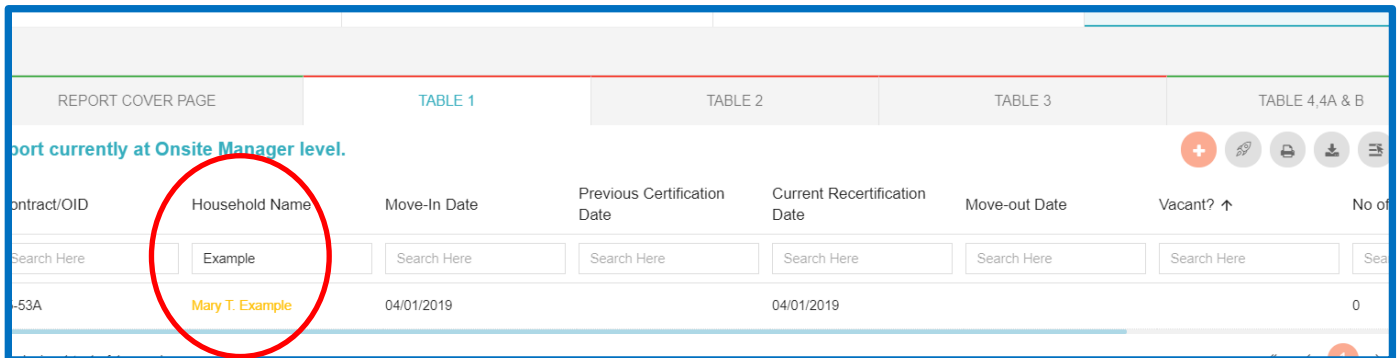
To process a transfer, click the open door icon under the **Actions** column for the household you are moving.

A screenshot of the 'REPORTS' interface showing a table with columns: 'Previous Certification Date', 'Current Recertification Date', 'Move-out Date', 'Vacant? ↑', 'Utility Allowance', and 'Actions'. The 'Actions' column contains an open door icon. A red circle highlights the 'Actions' column header and the icons in the first three rows of the table.

Previous Certification Date	Current Recertification Date	Move-out Date	Vacant? ↑	Utility Allowance	Actions
<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	<input type="text" value="Search Here"/>	
	04/23/2018			0	
	12/01/2018			0	
	07/12/2018			0	
01/01/2017	01/01/2018			0	
11/01/2017	11/01/2018			0	

How do I find a specific resident record in the Table 1 list view?

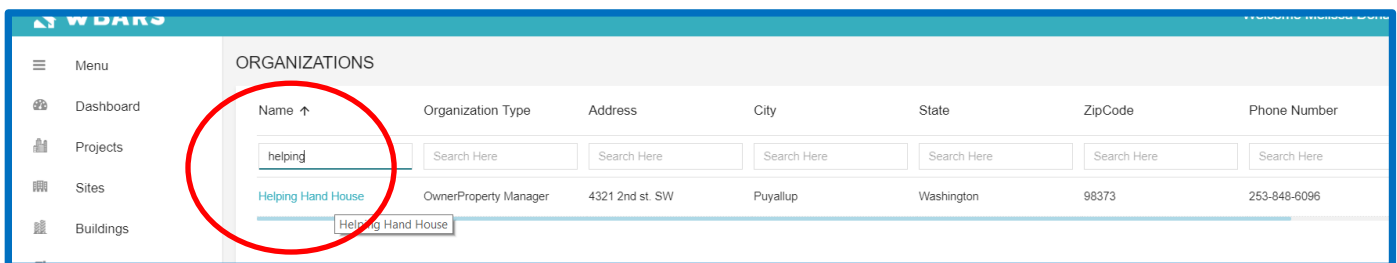
You can search for specific records by typing search criteria in the search fields under any Column header.



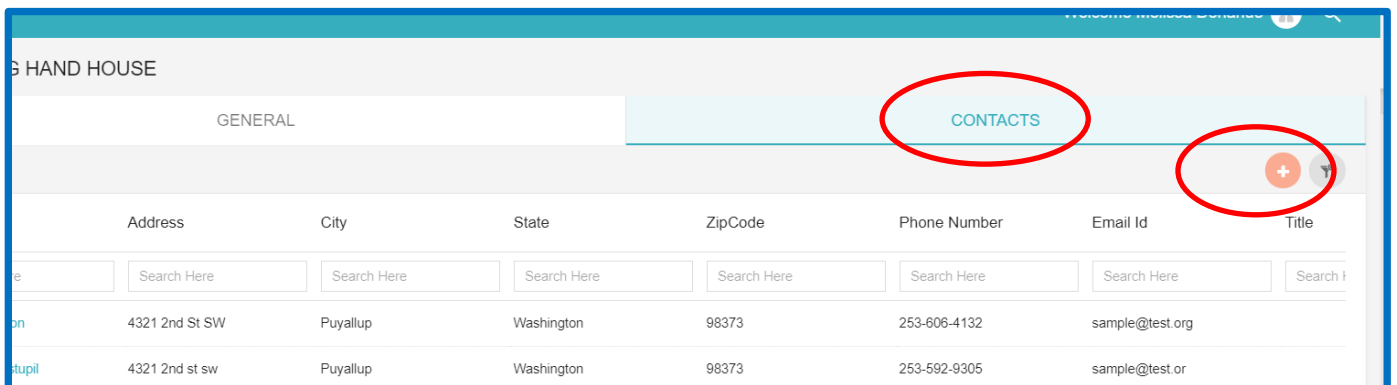
To clear your search criteria and see all the Table 1 records, click the **Clear Filter** icon to the right of the **Select Column** icon (see screen shot of Table 1 function icons on previous page).

I'm the WBARS Org Admin for my company – how do I add a new WBARS user to our company record?

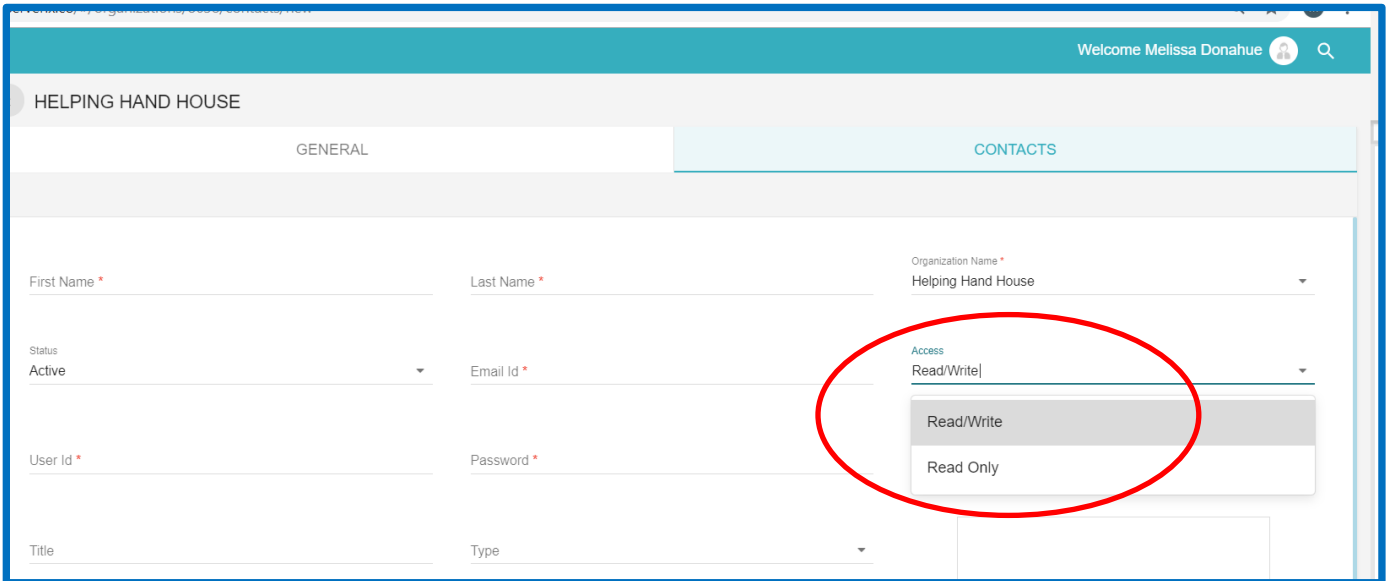
Click on the **Organizations** icon on the left side of the screen. When the module opens, the only entry will be the company you are associated with. Click on your company name:



Your company record has two tabs, GENERAL and CONTACTS. Click the **CONTACTS** tab to see a list of users associated with this company. Then click the orange plus sign icon in the top right to open a new contact record:

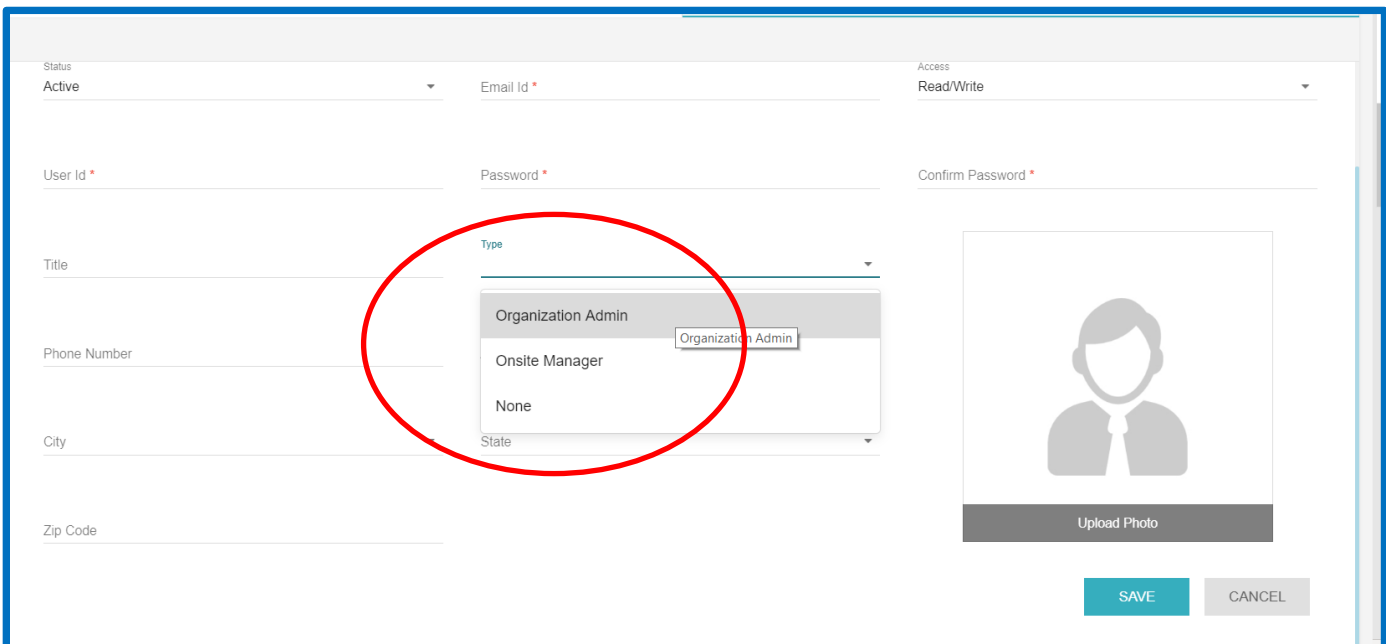


Fill in all the fields, making sure to specify whether this user can edit records (Read/Write access) or just view records without being able to make changes (Read Only access):



The screenshot shows a user creation form for 'HELPING HAND HOUSE'. The 'CONTACTS' tab is active. The form includes fields for First Name, Last Name, Organization Name (set to 'Helping Hand House'), Status (set to 'Active'), Email Id, User Id, Password, Title, and Type. A red circle highlights the 'Access' dropdown menu, which is open and shows two options: 'Read/Write' and 'Read Only'.

Also make sure to designate if the new user should be an Organization Administrator or an Onsite Manager by clicking the dropdown arrow in the **Type** field and clicking on the appropriate choice. Be sure to create a user ID and password for the new user. Then click the **SAVE** button at the bottom of the screen:



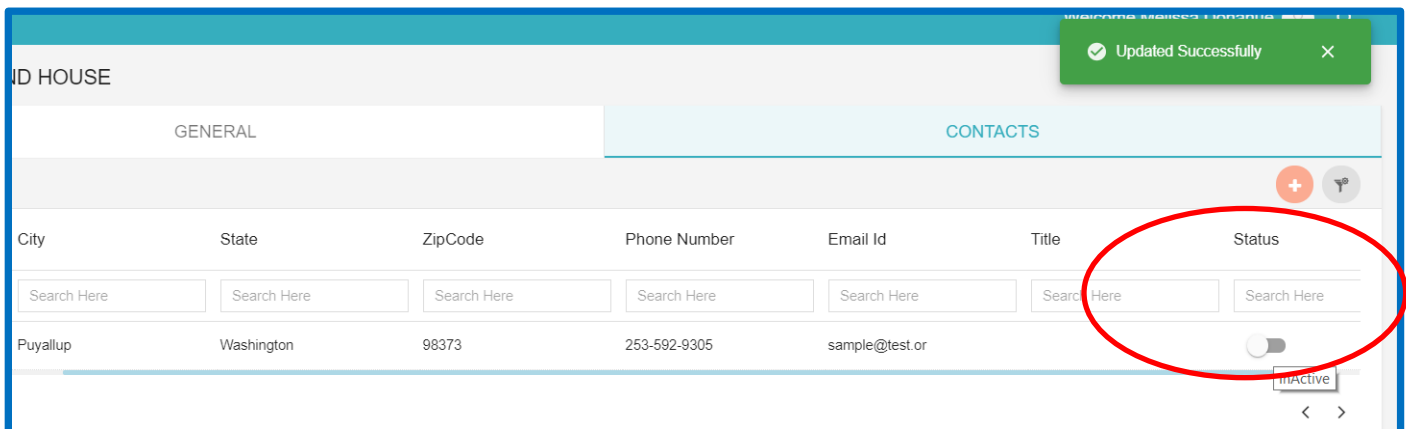
The screenshot shows the same user creation form, but with the 'Type' dropdown menu open. A red circle highlights the dropdown menu, which shows three options: 'Organization Admin', 'Onsite Manager', and 'None'. The 'Organization Admin' option is selected. The form also includes fields for Confirm Password, Title, Phone Number, City, State, and Zip Code. A photo upload area with a 'Upload Photo' button is visible on the right. At the bottom, there are 'SAVE' and 'CANCEL' buttons.

If the user is not an OA or an Onsite Manager, then the **Type** field value is None.

I'm the WBARS Org Admin for my company – how do I get rid of a user record for someone who no longer works at our company?

In WBARS, you can't delete a user record. If someone stops working for your company, then you **inactivate** their record. In the **CONTACTS** tab of your company's organization record, find the user you want to inactivate.

When you've located the user's record, click on the Active/Inactive button to the far right of the person's name under the **Status** column. This will inactivate the user:



Just like in the previous system, a red asterisk will now appear to the left of the inactivated user's record.

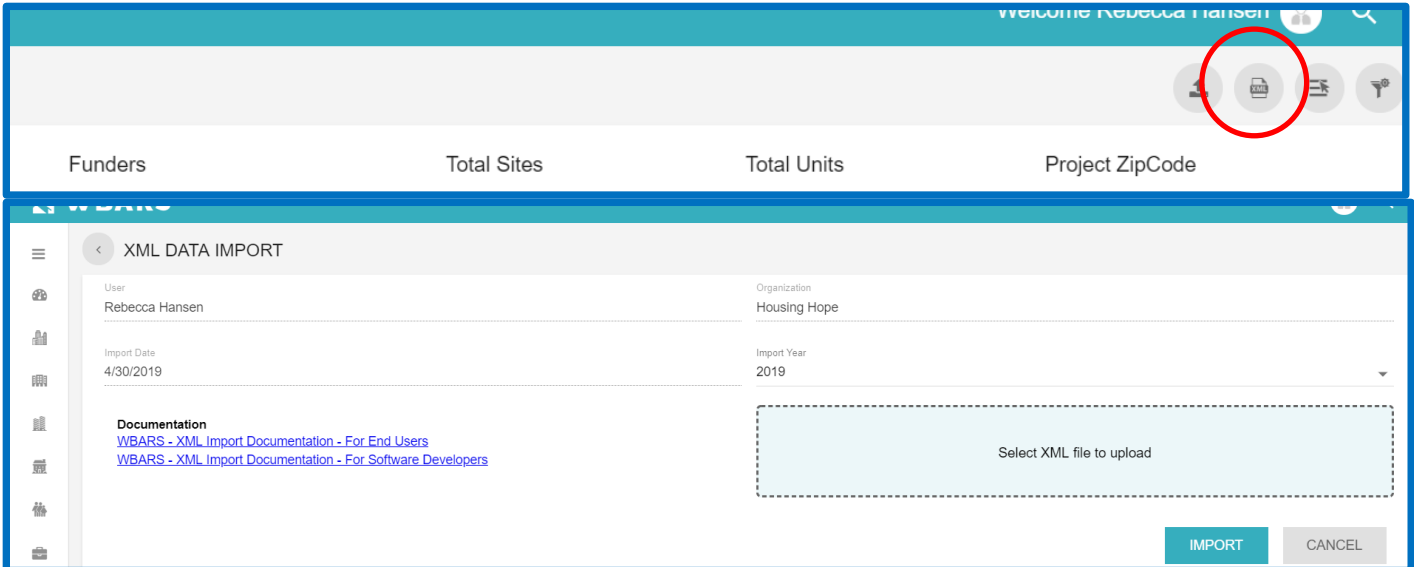


Remember:

If the user you inactivated was attached to one or more Project records as the Property Manager, Onsite Manager or Owner Contact, you'll need to go into each Project record to update those Contact fields!

I'm a Property Manager contact in WBARS and I need to import our Table 1 data via XML – where do I do that?

After logging in, click on the **Projects** icon (in the left side vertical navigation bar). On the Projects list view page, your XML import icon is in the top right corner (circled below). Click the icon and an XML import staging area will open – a copy of the schema template and import guidance is also available on that page.



I'm a Property Manager contact in WBARS and I want to use the utility allowance bulk upload to change utility allowances at my properties – where do I do that?

After logging in, click on the **Projects** icon (in the left side vertical navigation bar). On the Projects list view page, your UA upload icon is in the top right corner (circled below). Click the icon and the upload area will open.

