

WORKdirector-Electric



Training Guide



October, 2013

Table of Contents

Subject	Page
WORKdirector Overview	1
Understanding the WORKdirector Navigator Bar	2
Understanding CarteGraph's Toolbar	3
Understanding Forms	4
Create a Purchase Order	5
Print Purchase Order Report	10
Receive & Stock Purchase Order Materials	11
Create a Service Report	13
Print the Service Report	19
Create a Contractor Materials Order	20
Print Contractor Material Sign-Off Sheet	24
Materials Management Overview	25
Filtering Materials Records	26
Inventory Data Display	26
Materials Log Display	27
Adjusting Inventory Balances	27
Inventory Reports	29
Standard Reports	31
Running Reports	31
Filter Builder Introduction	33
Filter Builder – Select Values and Sort	34
Filter Builder at a Glance	35
Filter Builder Operations	36
Create Filters on the Fly	37
Move Inventory Command	38
Move Inventory Scenario	40
Access to SIGNALview from WORKdirector	45

WORKdirector Training Guide

WORKdirector Overview

WORKdirector is a work management program created and designed to generate Service Reports, create Purchase Orders and calculate the cost of business and inventory material items. WORKdirector will assist DOT in managing their Electrical asset inventories and will be used in conjunction with SignalView.

Starting WORKdirector

1. Locate the CarteGraph Navigator icon on your desktop.



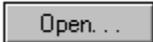
2. Double-click on the icon.

Open an Existing Data Link to WORKdirector or SignalView

1. Menu Option: File
2. Open Datalink or Click .

- a) Select the datalink (file ending with .cgd) from the Recent Files list.
 1. Signals.cgd is used to open WORKdirector which is a direct Oracle interface.

 Signals.cgd

3. Click 

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Understanding the WORKdirector Navigator Bar

Each CartêGraph module has a button on the Navigator Bar.

By default, the groups on the Navigator Bar represent each installed module.

Click on a Group Button to view the Page Icons.

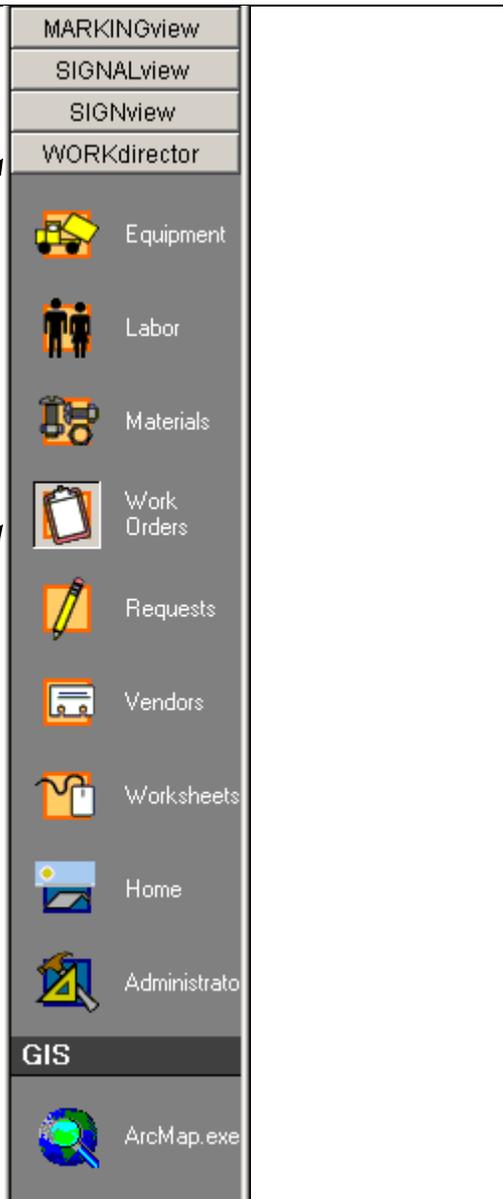
Group Buttons

Each group consists of Pages that are categorized by labels call Page Icons.

Click on a Page Icon to view the forms for this application.

Page Icons

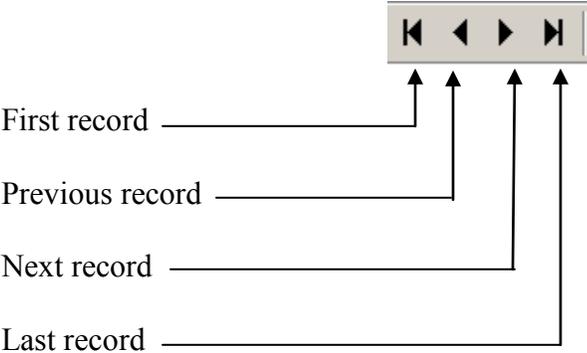
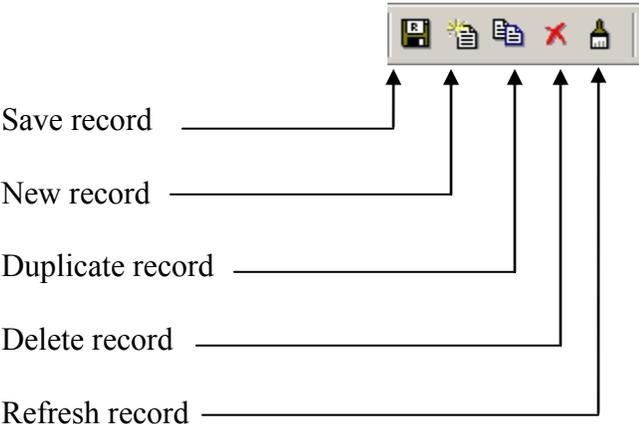
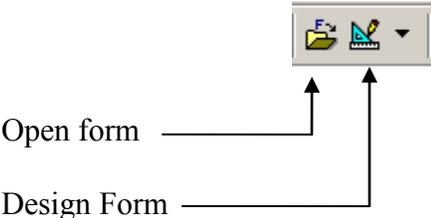
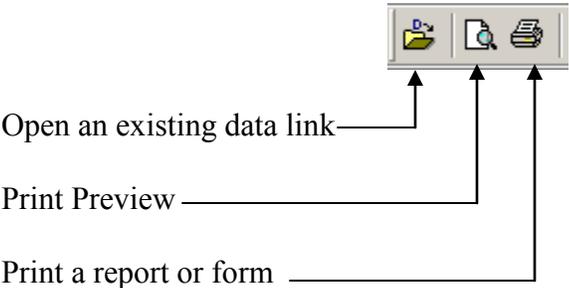
The WORKdirector Electric application will primarily use the Materials and Work Orders page icons. Data is also maintained using the Equipment, Labor and Vendors applications.



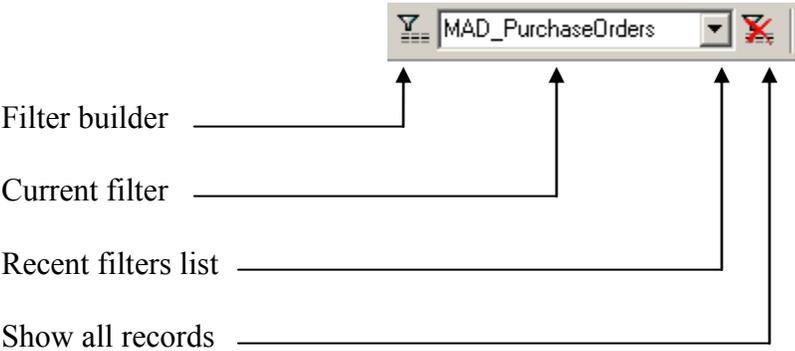
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Understanding CarteGraph's Toolbar

The Toolbar contains icon shortcuts to commonly used tasks.



WORKdirector Training Guide



The tool bar is called the “Standard” in Cartegraph and can be accidentally removed, to get it back right click on the main tool bar and make sure Standard has a check next to it.

Understanding Forms

1. Forms in CarteGraph control the data that is displayed. Multiple forms can be found in a single module. In WORKdirector – Work Orders there are 3 forms:
 - a) Elec Purchase Order
 - b) Elec Service Report
 - c) Elec Contractor Materials
2. Forms are selected by clicking on the appropriate tab at the bottom of the screen.

Forms Tabs located at the bottom of the Work Orders screen.



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Create a Purchase Order

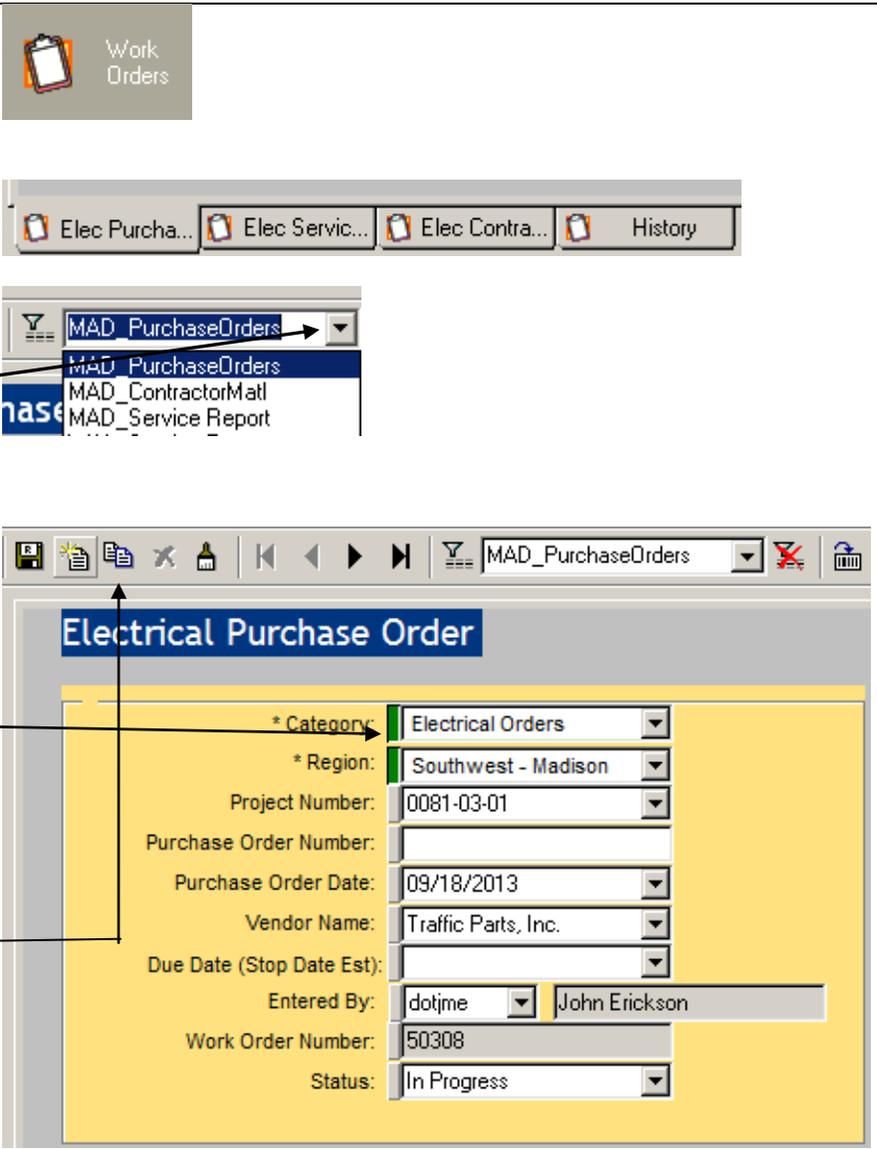
Select **Work Orders** from the Navigation Bar

Click on the **Elec Purchase Order** form tab.

Select the PurchaseOrders filter for your region from the Recent Filters drop down button.

Enter "Parent Record" Data

1. Toggle any fields that you want to carry over to the new record. You do this by clicking the green toggle on the left side of each field you want to duplicate.
1. Recommend toggling the **Category** and **Region** fields.
2. Now click the **"New Record"** button.
3. **Category & Region**
 - Skip these fields if the toggle button is set, they will automatically fill in once the next field is entered.
4. **Project Number**
 - Enter a Project Number or select from the drop down list.
5. **Purchase Order Number – Pcard Purchase**
Create a new Purchase Order Number with the format:
 - XXXX-MMDDYY-##



Note

- XXXX = last 4 digits of PCard number.
- MMDDYY= today's date.
- ## = sequential number for today's purchase orders.

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6. **Purchase Order Number – Central Office Purchase Order**

- Enter the Purchase Order Number assigned by purchasing.

7. **Purchase Order Date**

- Enter the date or select from the drop down calendar.

8. **Vendor Name**

- Enter a Vendor or choose from the drop down list.

9. **Due Date**

- Enter the date or select from the drop down calendar.

10. **Entered By**

- Automatically fills with the current user's login id.

11. **Work Order Number**

- Automatically fills in.

Note

This number will be important for Purchase Orders being placed with CO Purchasing. If the PO Number is unknown at the time this record is entered a person can find the record at a later date using the Work Order number.

12. **Status**

- The default value on a new record is "Planned". Change this to "Complete" when the PO is received.

13. **Regional Office Notes**

- Enter any notes needed to identify the purchase order.

The screenshot shows a web-based form titled "Electrical Purchase Order". The form is set within a browser window with the address bar showing "MAD_PurchaseOrders". The form fields are as follows:

* Category:	Electrical Orders
* Region:	Southwest - Madison
Project Number:	0081-03-04
Purchase Order Number:	TRC3504579
Purchase Order Date:	12/11/2012
Vendor Name:	Neher Electric Supply Inc.
Due Date (Stop Date Est):	02/05/2013 2:00:00 PM
Entered By:	dotdor Dale Roth
Work Order Number:	43577
Status:	Completed

The screenshot shows a text area titled "Regional Office Notes:". The text "Bought for project." is entered into the text area.

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Save The Parent Record

1. Click the Save icon that is located on the toolbar.
2. Complete the History Event Entry.
 - Activity = Order Electrical Material
3. Click the **Save** button.

A screenshot of a dialog box titled "Event Entry - Work Orders". The text inside says "Enter event information for the 'Work Orders' record: 11613". There is a "Reset" button in the top right. Below that is a "Completed:" label with a checked checkbox. Then are several dropdown menus: "When Started:", "When Ended:" (with the value "08/04/2009"), "Activity:" (with the value "Order Electrical Material"), "Who:" (with the value "dotfxc"), "Why:", and "Cost:". Below these is a "Notes:" label and a text area with scrollbars. At the bottom are "Save" and "Bypass" buttons. An arrow points from the third step of the instructions to the "Save" button.

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Enter Line Item Details

1. **ID**
2. Start to enter the first few letters of the commodity you want to enter.
3. Type-ahead will start to fill the field.
4. In this example the letters "SIGNAL" were entered.

- Click the down arrow to open the Materials Library.

- Make sure that the Quick Filter is set to "Electrical Material".

- You can now scroll to the item you wish to order using the scroll bar on the right side of this window.

- Click on the desired ID and the window will close.

2. Commodity Code Description

- Skip this field; it will fill in automatically when you leave this line.

3. Transaction

- Defaults to "Used" – change this to "On Order".

4. Location

- Skip this field; it will fill in automatically when you leave this line.

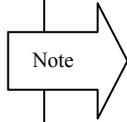
5. Quantity

- Enter the quantity purchased or to be ordered.

Commodity Code Description	Transaction	Location	Quantity	Price Per Unit	Cost
	On Order	SW - Madison	2 ea	0	0

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6. **Price Per Unit**
 - If this is a PCard purchase enter the price paid.
 - If this is going thru Purchasing leave the field blank.
7. **Cost**
 - Leave this field blank, it is a calculated field.
8. Click on the next blank line to save the record.



If the Material is on a Contract or if it has been ordered before for this region the price will fill in when you click off of the Line Item.

ID	Commodity Code Description	Transaction	Location	Quantity
SIGNAL HEAD, 8 in EAGLE, 000040	SIGNAL HEAD, 8 in EAGLE, SINGLE YE	On Order	SW - Madison	2 ea

Enter additional line items

9. Toggle the Transaction and Location fields so that they will duplicate on the additional line items.
10. Enter additional lines in the same manner as described above.
 - When all of the lines have been entered save the record by clicking the Save icon .
 - Then click the Bypass button on the Events Log screen.

Commodity Code Description	Transaction	Location
SIGNAL HEAD, 8 in EAGLE, SINGLE YE	On Order	SW - Madison

Who: dotfxc

Why:

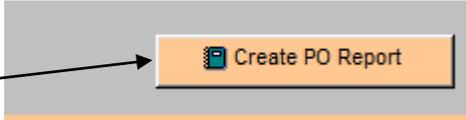
Cost:

Notes:

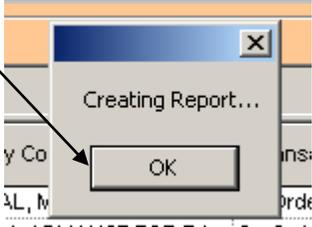
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Print Purchase Order Report (optional)

1. The Purchase Order can be printed by clicking on the Create PO Report button.

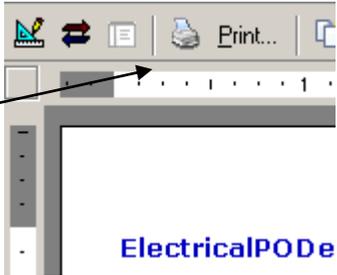


2. Click the OK button on the "Creating Report..." message.

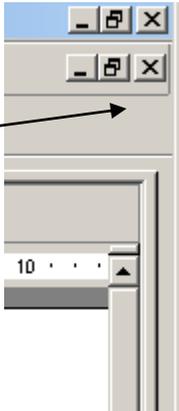


3. The report will now display on your screen.

4. Print it by clicking the Print button on the report window.



5. Close the report by clicking on the lower "X" in the upper right side of the window.



WORKdirector Training Guide

Receive & Stock Purchase Order Materials

1. When the items are received each must be "Stocked" so that they increase the inventory on hand balances.
2. Locate the PO you want to receive.



A PO can be located by clicking through the records, doing a "Prompt For Value" search or using the Actions → Go To Work Order menu option. Note that this is the Work Order field, not the PO Number field.

3. Locate the first line item to be received.

Line Item Details Create PO Report E-mail PO Report

Material

ID	Commodity Code Description	Transaction	Location	Quantity	Price Per Unit	Cost
LUMINAIRE, 150W, MULTITA 0385	LUMINAIRE, 150W, MULTITAP, FLAT	Stock Item	V - Madison	15 ea	202.15	3032.25
LUMINAIRE, 250W, HPS, MU 0003	LUMINAIRE, 250W, HPS, MULTITAP (1	Stock Item	SW - Madison	3 ea	0	0
LUMINAIRE, 250W, HPS, MU 0003	LUMINAIRE, 250W, HPS, MULTITAP (1	On Order	SW - Madison	3 ea	0	0
LUMINAIRE, 150W, MULTITA 0385	LUMINAIRE, 150W, MULTITAP, FLAT	On Order	SW - Madison	15 ea	0	0

Record 1 of 4

4. Highlight the line by pointing your mouse to the first column (before the ID field) and clicking your right mouse button. This message box will be displayed.

ID	Commodity Code Description
METER PEDESTAL, MILBANK # 000521	METER PEDESTAL, MILBANK #U8980-(
BALLAST, 110V, ADVANCE F 000074	BALLAST, 110V, ADVANCE FOR RA
DRI 000001	ANCHOR, MASONRY, SELF-DRILL, 1/2

New Record

Duplicate Record

Delete Record

5. Select Duplicate Record.

6. The line will duplicate at the bottom of the grid and is ready for entering or modifying any of the fields.

DRI 000001	ANCHOR, MASONRY, SELF-DRILL, 1/2
BALLAST, 110V, ADVANCE F 000074	BALLAST, 110V, ADVANCE FOR RA
*	

7. Tab to the "Transaction" field and change it to **Stock Item**. Then tab to the "Shipped Date" field and enter the date you received the material.

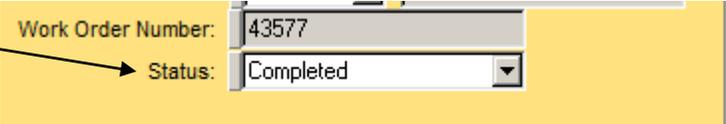
Transaction	Location	Quantity	Price Per Unit	Cost	Shipped Date
On Order	SW - Madison	20 ea	323.29	6465.8	
On Order	SW - Madison	20 ea	17.86	357.2	
On Order	SW - Madison	20 ea	43.6	872	
Stock Item	SW - Madison	20 ea	17.86	357.2	08/06/2009

8. Click on the next blank line to save the change you just made.

9. Continue to duplicate and modify each line item received.

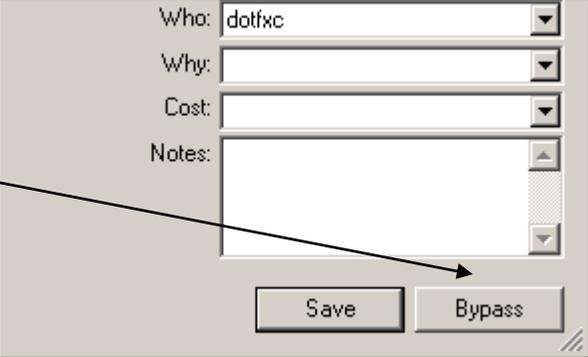
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10. Change the "Status" to **Complete**.



Work Order Number: 43577
Status: Completed

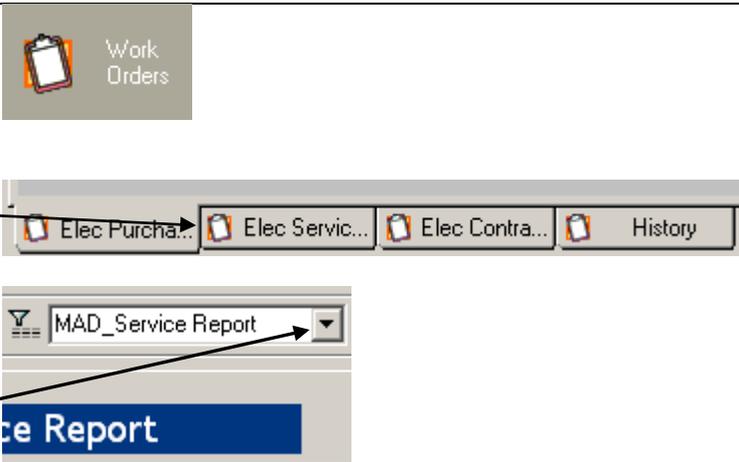
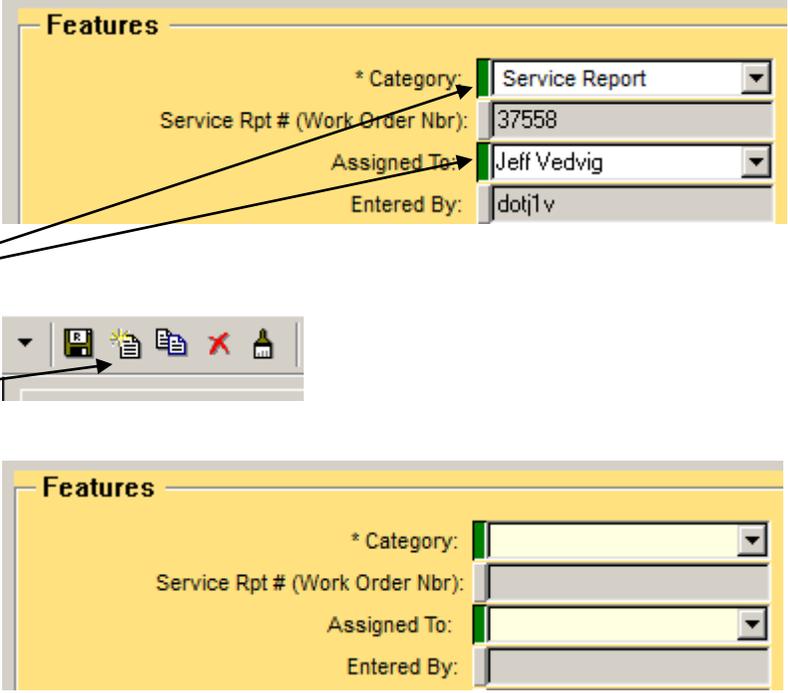
11. Click the Save icon  when all line items have been updated and click the Bypass button on the Events Log screen.



Who: dotfxc
Why:
Cost:
Notes:
Save Bypass

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Create a Service Report

<p>Select Work Orders from the Navigation Bar</p> <p>Click on the Elec Service Report form tab.</p> <p>Select the XXX_Service Report filter for your region from the Recent Filters drop down list.</p>	
<p>Enter "Parent Record" Data</p> <ol style="list-style-type: none"> 1. Toggle any fields that you want to carry over to the new record. You do this by clicking the green toggle on the left side of each field you want to duplicate. 2. Recommend toggling the Category and possibly the Assigned To fields. 3. Now click the "New Record" button. 4. Category & Assigned To <ul style="list-style-type: none"> • Skip these fields if the toggle button is set, they will automatically fill in once the next field is entered. 5. Entered By <ul style="list-style-type: none"> • Fills in automatically when the record is saved. 	

WORKdirector Training Guide

6. **Signal Group ID**
- Type in the Signal ID or choose from the dropdown list.
 - Make sure your region is the active quick filter.

ID	Installation Site ID
S0386	STH 19 & CTH C
S0388	USH 12 / USH 18 & Monona Dr
S0395	USH 12 / USH 18 & USH 51
S0396	USH 12 / USH 18 & South Towne Dr
S0414	USH 14 & Pleasant View Rd
S0416	STH 113 & CTH M

SW Madison Open . . .

7. Once the **Signal Group ID** is selected the next 6 fields will fill in automatically.

Signal Group ID: S0395

Installation Site ID: USH 12 / USH 18 & USH 51

Street (Route): _012E

City: Madison

County: Dane

Region: Southwest - Madison

Travel Miles: 12 mi

8. **Incident Number**
- Enter the STOC Incident Number if there is one.

Incident Number:

Status: Planned

9. **Status**
- The status will change from **Planned** to **Service Report Complete** when the record is saved.

10. **Call Reason (required field)**
- Select the desired Activity from the drop down list.
 - Note: Make sure that Signal Activities quick filter is set.

Call Reason (Activity):

- Cabinet Check
- Clean Lens
- Clean/Relamp Luminaire
- Conflict Monitor Failure
- Controller Failure
- Damage-Repair
- Damage-Secure
- Detection Malfunction

Signal Activities Open . . .

11. **Project Number (required field)**
- Enter a project number or select one from the drop down list.

Call Reason (Activity): Electrical Inspection

Project Number:

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- 12. **Work Date**
 - Enter the date the work was performed.
- 13. **Report Date**
 - Fills in today's date automatically.
- 14. **Called – Departed**
 - Time fields that can be selected from the drop down list.

Work Date: [dropdown]
Report (Transaction) Date: 10/30/2013
Called: [dropdown]
Responded: [dropdown]
Arrived: [dropdown]
Departed: [dropdown]

- 15. **Work Performed**
 - This is a notes field to enter any text about the service report.

Work Performed (Region Office Notes):

- Save the Parent Record**
- 16. Click the **Save** icon which is located on the toolbar.
- 17. **Complete the Event Entry.**
 - **Activity** fills in automatically to the same value as the **Call Reason** on the service report.
- 18. Click the **Save** button.



Event Entry - Work Orders
Enter event information for the 'Work Orders' record:
11665

Completed: [Reset]
When Started: 07/27/2009 [dropdown]
When Ended: 08/06/2009 [dropdown]
Activity: Electrical Inspection [dropdown]
Who: dotfxc [dropdown]
Why: [dropdown]
Cost: [dropdown]
Notes: [text area]
[Save] [Bypass]

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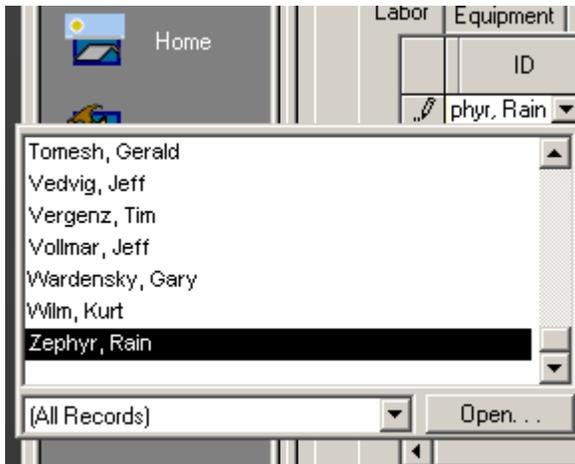
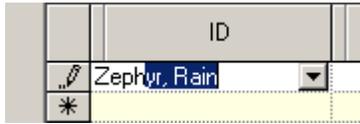
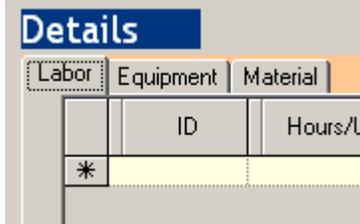
Enter Service Report Details

Notice that there are 3 tabs on the details grid; Labor, Equipment and Material.

We will start with the **Labor** tab.

1. ID (Employee Name - Last, First)

- Start to type in the last name of the person who worked on the service report and the field will start to auto-fill.
- You can accept the value or click on the drop down arrow to select a name.



2. Hours/Units

- Enter the hours worked.

3. Overtime 1 Hours

- Enter the overtime hours worked.

4. Rate Name (Default or Damage Claim)

- Enter the appropriate rate name.

5. Use Overhead

- If this is a Damage Claim then click this field to apply an Overhead rate to the total cost.

- 6. Enter the information about any additional staff who worked on this service call.

- 7. When all names have been added click on the next blank line to be sure that the last ID was recorded.

Labor					
ID	Hours/Units	Overtime 1 Hours	Rate Name	Use Overhead	
Zephyr, Rain	2	1	Default	<input type="checkbox"/>	

ID	Hours/Units	Overtime 1 Hours	Rate Name	Use Overhead	
Zephyr, Rain	2	0.88	Damage Clai	<input checked="" type="checkbox"/>	

ID	Hours/Units	Overtime 1 Hours	Rate Name
Zephyr, Rain	2	0.88	Dama
Wardensky, Gary	2	0	Defau
*			

WORKdirector Training Guide

Next the **Equipment** tab will be completed.

1. ID (Fleet ID)

- Enter the numeric ID of the vehicle that was used or select it from the drop down list.

Labor	Equipment	Material
	ID	Start Usage
*		

ID	Description	Re
0053	C7500 Chassis	Northeast - G
0067	4300 Chassis	Southwest - I
0073	3500 Chassis	Northeast - Gi
0102	3500 Chassis	Southeast - W
0144	C6500 Chassis	North Central

2. Start Usage and Stop Usage

- The Stop Usage will fill in automatically with the **Travel Miles** from the Site ID library. This is displayed on the top portion of the screen.
- If there is a value just skip these fields.
- If the Travel Miles is blank then you need to type in the round trip miles.
- If this is equipment that uses hours you need to fill in the Start and Stop Usage.

County: Dane
 Region: Southwest - Madison
 Travel Miles: 12 mi

ID	Start Usage	Stop Usage	Total Usage	Cost	Notes
0067	0	12.5	12.5	17.25	

3. Notes

- Enter any **Notes** if needed.

ID	Start Usage	Stop Usage	Total Usage	Cost	Notes	Rate	Account
0067	0	12.5	12.5	17.25		1.38 \$/mi	

- Continue to enter lines for any additional equipment used on this service call

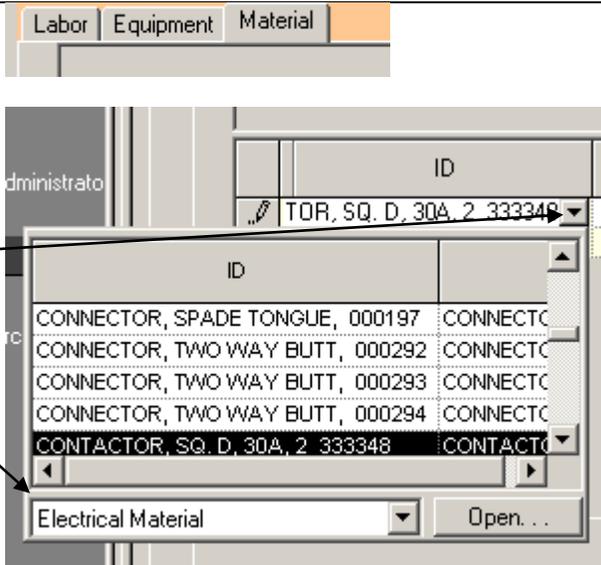
- When all equipment has been added click on the next blank line to be sure that the last ID was recorded.

WORKdirector Training Guide

Next the **Materials** tab will be completed.

1. ID (Materials ID)

- Type in the first few letters of the Material that was used and then click the drop down list arrow.
- Make sure “Electrical Materials” quick filter is active.
- Scroll down and select the material you want to add.



6. Commodity Code Description

- Skip this field; it will fill in automatically when you step off of this line.

ID	Commodity Code Description	Transaction
CONTROLLER, EPAC 333333		Used

7. Transaction

- Defaults to Used.

8. Location

- Defaults to the location of the Signal Site.

Location	Quantity	Price Per Unit	Cost
SW - Madison	1 ea		0

9. Quantity

- Fill in the quantity used.

10. Price Per Unit and Cost

- Skip these fields and click to the next line.

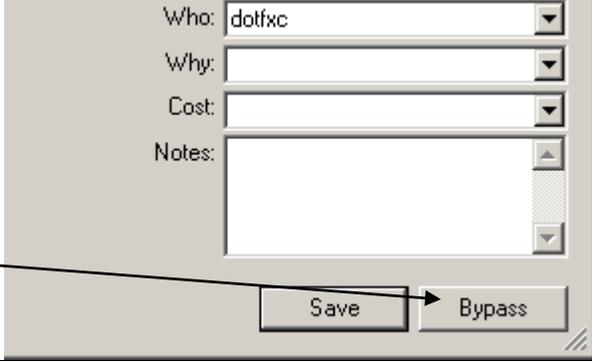
11. Continue to enter lines for any additional material used on this service call

12. When all equipment has been added click on the next blank line to be sure that the last ID was recorded.

ID	Commodity Code Description
SIGNAL HEAD, 12 in MCCAIN	SIGNAL HEAD, 12 in MCCAIN, 5 SEC
BASE, PEDESTAL 20 in HIGH	BASE, PEDESTAL 20 in HIGH ALUM
*	

WORKdirector Training Guide

1. Click the Save icon  when all line items have been updated and click the Bypass button on the Events Log screen.



The screenshot shows a form with the following fields: 'Who' (dropdown menu with 'dotfxc' selected), 'Why' (dropdown menu), 'Cost' (dropdown menu), and 'Notes' (text area). At the bottom of the form are two buttons: 'Save' and 'Bypass'. An arrow points from the 'Save' button in the text to the 'Save' button in the screenshot.

Print Service Report (optional)

1. The Service Report can be viewed and printed by clicking on the Service Report Details button.



2. Click the OK button on the "Creating Report" message.



3. The report will now display on your screen.

4. Print it by clicking the Print button on the report window.



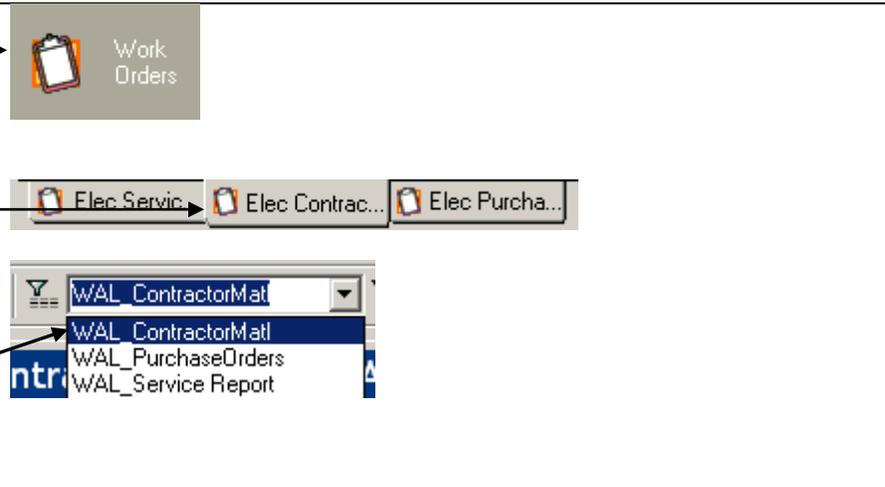
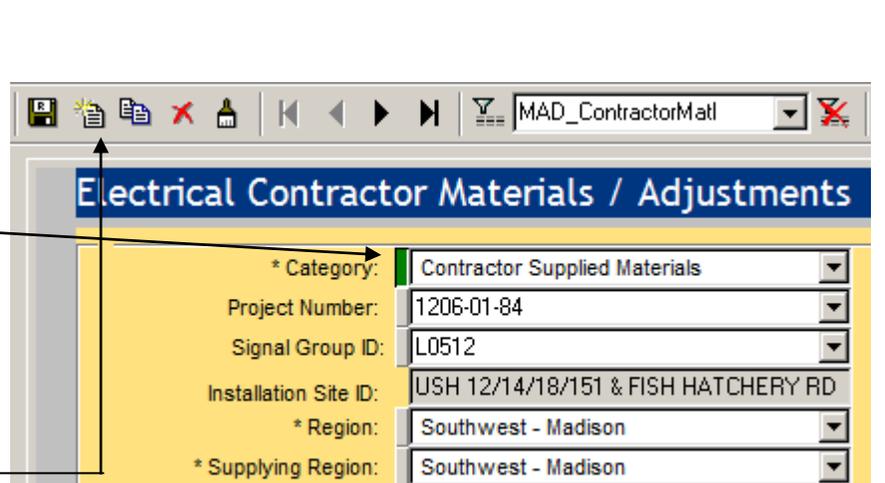
5. Close the report by clicking on the lower "X" in the upper right side of the window.



The screenshot shows a toolbar with icons for Print, Refresh, and other functions. The 'Print...' button is highlighted with an arrow. Below it, a window title bar is shown with a close button (X) highlighted by an arrow.

WORKdirector Training Guide

Create a Contractor Materials/Adjustments Order

<p>Select Work Orders from the Navigation Bar</p> <p>Click on the Elec Contractor Materials form tab.</p> <p>Select the ContractorMatl filter for your region from the Recent Filters drop down button.</p>	 <p>The screenshot shows the 'Work Orders' navigation bar with three tabs: 'Elec Servic...', 'Elec Contrac...', and 'Elec Purcha...'. Below the tabs is a filter dropdown menu with the following options: 'WAL_ContractorMat', 'WAL_PurchaseOrders', and 'WAL_Service Report'. The 'WAL_ContractorMat' option is selected and highlighted.</p>														
<p>Enter "Parent Record" Data</p> <p>14. Toggle any fields that you want to carry over to the new record. You do this by clicking the green toggle on the left side of each field you want to duplicate.</p> <p>5. Recommend toggling the Category field and possibly the Project Number field.</p> <p>15. Now click the "New Record" button.</p>	 <p>The screenshot shows the 'Electrical Contractor Materials / Adjustments' form. The form has a toolbar at the top with icons for save, print, delete, and other actions. Below the toolbar is a filter dropdown menu with 'MAD_ContractorMat' selected. The form fields are as follows:</p> <table border="1"><tr><td>* Category:</td><td>Contractor Supplied Materials</td></tr><tr><td>Project Number:</td><td>1206-01-84</td></tr><tr><td>Signal Group ID:</td><td>L0512</td></tr><tr><td>Installation Site ID:</td><td>USH 12/14/18/151 & FISH HATCHERY RD</td></tr><tr><td>* Region:</td><td>Southwest - Madison</td></tr><tr><td>* Supplying Region:</td><td>Southwest - Madison</td></tr><tr><td>Receiver Org:</td><td></td></tr></table>	* Category:	Contractor Supplied Materials	Project Number:	1206-01-84	Signal Group ID:	L0512	Installation Site ID:	USH 12/14/18/151 & FISH HATCHERY RD	* Region:	Southwest - Madison	* Supplying Region:	Southwest - Madison	Receiver Org:	
* Category:	Contractor Supplied Materials														
Project Number:	1206-01-84														
Signal Group ID:	L0512														
Installation Site ID:	USH 12/14/18/151 & FISH HATCHERY RD														
* Region:	Southwest - Madison														
* Supplying Region:	Southwest - Madison														
Receiver Org:															
<p>16. Category (Contractor Supplied Materials)</p> <ul style="list-style-type: none">• Skip this field if the toggle button is set, it will automatically fill in once the next field is entered. <p>17. Project Number</p> <ul style="list-style-type: none">• Enter a Project Number or select from the drop down list. <p>18. Signal Group ID:</p> <ul style="list-style-type: none">• Enter a Signal Group number or pick from the drop down list.															

WORKdirector Training Guide

19. Installation Site ID

- This will fill in automatically when the record is saved.

20. Region & Supplying Region

- These will fill in automatically when the record is saved.
- You can change the values if needed.

21. Regional Office Notes

- Enter any notes needed to identify the purchase order.

Electrical Contractor Materials / Adjustments

* Category: Contractor Supplied Materials
Project Number: 1206-01-84
Signal Group ID: L0512
Installation Site ID: USH 12/14/18/151 & FISH HATCHERY RD
* Region: Southwest - Madison
* Supplying Region: Southwest - Madison
Receiver Org:

Regional Office Notes

The thin top templates are to be returned to the SW-Region
Madison shop.
Attn: Dale Roth
11 sets of 9, 10 Mono tube bolts (66)

22. Entered By

- This will default to your login id. Skip the field.

23. Entry Date & Last Modified

- Skip these fields. They will fill in automatically when the record is saved.

24. Status

- Defaults to **Planned**. Leave this as is until the shipment is complete.
- If the shipment is complete change the value to **Contractor Materials Complete**.

25. Pickup Date (Work Date)

- Enter the date the order is picked up.

26. Activity

- Skip this field.

Entered By: dotdor
Entry Date : 03/20/2013
Last Modified: 08/13/2013
Status: Contractor Materials Complete
Pickup Date (Work Date): 03/20/2013
Work Order Number: 46013
Activity: Send Electrical Material

Status: Contractor Materials Complete

Save The Parent Record

- Click the Save icon that is located on the toolbar.



WORKdirector Training Guide

28. Complete the History Event Entry.

- Activity = Send Electrical Material

29. Click the Save Button.

Next the Materials tab will be completed.

1. ID (Materials ID)

- Type in the first few letters of the Material that was used and then click the drop down list arrow.
- Make sure “Electrical Materials” quick filter is active.
- Scroll down and select the material you want to add.

2. Commodity Code Description

- Skip this field; it will fill in automatically when you step off of this line.

Line Item	ID	Commodity Code Description
(AutoNu	CONTROLLER, EPAC	333333
*		

WORKdirector Training Guide

3. Location

- This field will default to the same location as the **Signal Site** on the parent record.

4. Transaction

- Defaults to "Used".

5. Quantity

- Fill in the quantity being shipped.

- 6.** Continue to enter lines for any additional material being sent to the Contractor.

- 7.** When all equipment has been added click on the next blank line to be sure that the last ID was recorded.

Commodity Code Description	Location	Transaction	Quantity
	SE - West Allis	Used	2 ea

ID	Commodity Code Description
▶	SIGNAL HEAD, 12 in MCCAIN 0 SIGNAL HEAD, 12 in MCCAIN, 5 SEC
	BASE, PEDESTAL 20 in HIGH BASE, PEDESTAL 20 in HIGH ALUM
*	

- 8.** Click the Save icon  when all line items have been updated and click the Bypass button on the Events Log screen.

Who: dotfxc

Why:

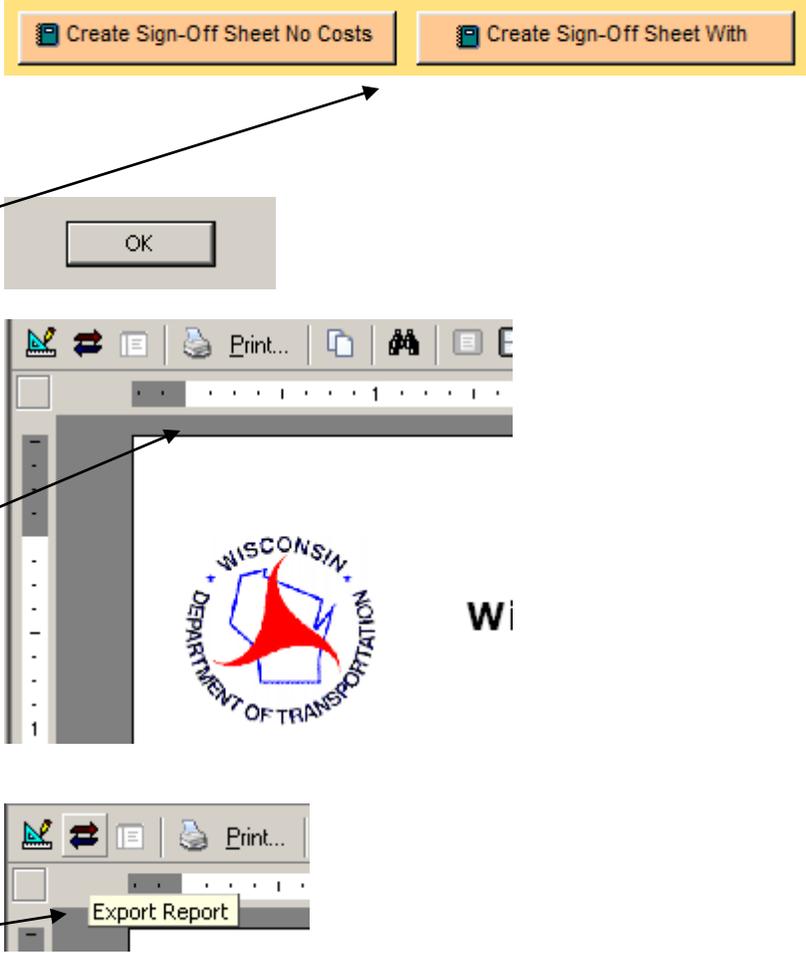
Cost:

Notes:

WORKdirector Training Guide

Print Contractor Material Sign-Off Sheet (optional)

1. There are 2 versions of this report; one with costs and the other without costs. Click the button for whichever report you want to view.
2. Click the OK button on the "Creating Report" message.
3. The report will now display on the screen.
4. You can print the report by clicking the Print button on the toolbar.
5. The report can also be saved as an Adobe .pdf file using the Export Report button.
 - It can then be attached to an email message.



WORKdirector Training Guide

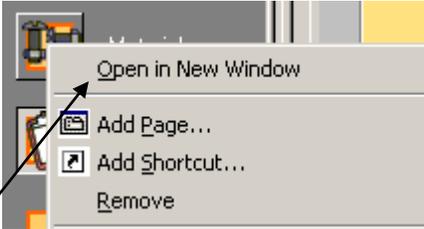
Materials Management Overview

The Materials module is the inventory application that tracks all of the transactions for each material id. When the transactions are entered on Service Reports, Purchase Orders or Contractor Materials they are tracked in the Materials Log. These same transactions are displayed on each individual material in this module. There is one record for each unique material id. The following section will discuss how to navigate between ids, to search for specific materials and to adjust inventory balances.

Select Materials from the Navigator Bar.



- **Tip!** Running an application in a new window.
- You can have both **Work Orders** and **Materials** running at the same time.
- If you already have Work Orders open point to the Materials icon and click your **Right** mouse button.
- Select **Open in new Window**
- There will now be two instances of CarteGraph running on your machine and you can move between them as you like.



WORKdirector Training Guide

Filtering Material Records

1. There are 'quick filter' buttons on the Materials form that can be clicked to filter the records to only the items starting with the chosen alphabetic character.
2. The bottom status bar displays the records in the current view. In this example all of the records are being displayed.
3. Clicking on the letter 'A' will change the number of records in the current view.



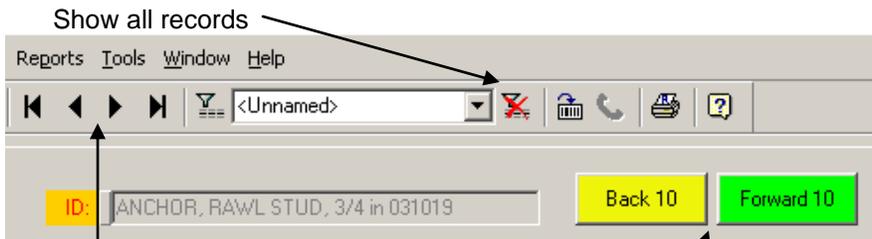
Materials ID: ANCHOR, MASONRY, SELF-DRI 000001 Viewing Record: 1 of 1090 Total: 4211 Filter Sort

All records are being displayed.

Materials ID: ANCHOR, MASONRY, SELF-DRI 000001 Viewing Record: 1 of 3 Total: 4211 Filter Sort

Clicking on "A" results in 3 records in the current view.

4. To set the view back to display all records click on the **Show All Records** icon at the top of the form.
5. Navigation between the records is done by clicking on the **Previous Record** or **Next Record** button or on the **Back 10** or **Forward 10** buttons.



Previous record
Next record

Forward or Backward 10 records.

Inventory Data Display

1. The Inventory data is displayed on the form in this area.
2. **Quantity on Hand** is calculated for each region and cannot be adjusted here.
3. **Reorder Point, Reorder Amount** and **Bin Location** can be updated in these field boxes.
4. Note that there is also a **Statewide Quantity** displayed.
5. The **Update Inventory** button will be used when making adjustments. It can be clicked at any time to recalculate the on hand balances.

Inventory

Quantity On Hand NW-EAU:

Reorder Point NW-EAU:

Reorder Amount NW-EAU:

Cost Each EAU:

Bin Location EAU:

Statewide Quantity:

Statewide inventory balances are displayed in the middle section of the form.

Quantity On Hand SE-WAL: Quantity On Hand NE-GRE: Quantity On Hand NC-WIS: Quantity On Hand NW-SPO:
 Quantity On Hand SW-MAD: Quantity On Hand SW-LAX: Quantity On Hand NC-RHI: Quantity On Hand MFG:

WORKdirector Training Guide

Materials Log:

1. Inventory balances are adjusted by making entries in the **Materials Log**.
2. This is referred to as the **'Child Record'** or the **'Materials Grid'**.

Materials Log:

	Line Item	Transaction	Location	Quantity	Price Per Unit	Quantity Remaining
	26325	Stock Item	SW - Madison	20 ea	43.6	20 ea
	26126	On Order	SW - Madison	20 ea	43.6	20 ea
*						

Adjusting Inventory Balances

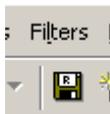
1. Locate the material item to be adjusted using any of the techniques described above.
2. Toggle any fields you would like to have duplicated, e.g. Location, by clicking on the Toggle bar on the field header.
3. Click on the first empty line on the Materials Grid.
4. **Transaction:** To increase on hand balances enter an ***Increase Adjustment***. To decrease the on hand balances enter a ***Decrease Adjustment***.
5. **Location:** Toggle this field or enter your region if needed.
6. **Quantity:** Enter the quantity to be increased or decreased.
7. **Price Per Unit:** Leave this blank and the current price will move in when the record is saved.
*This price needs to be added otherwise the program will input \$0 into regional service reports for this item
8. **Notes:** Enter any notes pertaining to why the inventory is being adjusted, e.g. "Year End Inventory"
9. The remainder of the fields are optional for an inventory adjustment transaction.
10. Click on the next blank line to write the record.
11. Save the record by clicking on Save Icon at the top of the form. →

Materials Log:

	Line Item	Transaction	Location	Quantity	Price Per Unit	
		Increase Adjustment	SW - Madison	19 ea	35.96	
*						

Transaction: Increase Adjustment or Decrease Adjustment

Quantity Remaining	Notes	Cost
15 ea	moved by MSCMFR	683.24
0 ea	Year End Inventory	143.84



WORKdirector Training Guide

12. Save the History Event Entry.
13. **Activity:** 'Physical Inventory Adjustments'.
14. Click the **Save** button.

Event Entry - Materials

Enter event information for the 'Materials' record:
BACKPLATE, 3 SEC, 12 in M 012180

Completed: Reset

When Started: 08/31/2009

When Ended: 08/31/2009

Work Order #:

Activity: Physical Inventory Adjustments

Who: dotfxc

Why:

Cost:

Notes:

Save Bypass

15. The Inventory balances will be adjusted based on the transaction just entered.
16. Clicking the **Update Inventory** button will recalculate the On Hand balance.

Before the transaction was entered.

Inventory

Quantity On Hand NW-EAU: 34 ea

Reorder Point NW-EAU: 10 ea

Reorder Amount NW-EAU: 50 ea

Cost Each EAU: 40.5 ea

Bin Location EAU: R4 S12

Statewide Quantity: 332 ea

Update Inventory

After a "Decrease Adjustment" transaction of 4 was entered.

Inventory

Quantity On Hand NW-EAU: 30 ea

Reorder Point NW-EAU: 10 ea

Reorder Amount NW-EAU: 50 ea

Cost Each EAU: 40.5 ea

Bin Location EAU: R4 S12

Statewide Quantity: 328 ea

Update Inventory

WORKdirector Training Guide

Inventory Reports

1. Regional Inventory Report:

- a. There is a report definition for each of the regions.
 - i. WAL_InventoryReport, GRE_InventoryReport, etc.

WAL_InventoryReport					
Filter	(Quantity On Hand WAL.amount > 0)				
Working Set Filter	((\Material Type is equal to "Electrical Material") And (\Commodity Code Description\Active = yes))				
Sort	Commodity Code Description				
Group By	<Not Applicable>				
WAL_InventoryReport					
Item	Commodity Code Description	Qty/Unit	Reorder Point	Reorder Qty	Bin Loc
031019	ANCHOR, RAWL STUD, 3/4 in X 7 in, #7446, DO NOT	230.00 ea			
010605	ANCHOR, SCREW-IN, ROUND ROD, 7 ft, 8 in - 10 in HELIX	41.00 ea			
012180	BACKPLATE, 3 SEC, 12 in MCCAIN	171.00 ea	25.00 ea	75.00 ea	
040008	BACKPLATE, 3 SEC, 12 in TCT	580.00 ea			
031272	BACKPLATE, 3M 3 SEC. 12 in BLACK	21.00 ea			
031271	BACKPLATE, 3M 4 SEC. 12 in BLACK	9.00 ea			WAREHOUSE
012188	BACKPLATE, 5 SEC, 12 in EAGLE/LFE AUTOMATIC SIGNAL	103.00 ea			
040006	BACKPLATE, 5 SEC, 12 in TCT	154.00 ea			
012184	BACKPLATE, 5 SEC, MC CAIN	48.00 ea	25.00 ea	54.00 ea	
000026	BALLAST, 150W, 120/208/240/277V, G.E. inHIDFIXER in	40.00 ea			Ballast section
000029	BALLAST, 150W, 480V, G.E. inHIDFIXER in, REPL KIT, A	19.00 ea			Ballast Section
040243	BALLAST, 1000W, 480V, HOLOPHANE CAT.	45.00 ea	10.00 ea	10.00 ea	Ballast Section
043028	BALLAST, HIGH MAST, 1000W, MULTI-TAP, HOLOPHANE #	35.00 ea	10.00 ea	25.00 ea	Signing Racks
000093	BALLAST, HPS, 100W, 240V, FOR HOLOPHANE 60, 0 SERI	1.00 ea			Ballast Section
000020	BALLAST, HPS, 100W, QUARDR-VOLT, inHIDFIXER in,	13.00 ea	10.00 ea		Ballast Section

WORKdirector Training Guide

2. Electrical Inventory LAB Report

- a. There is a report definition for each of the regions.
 - i. WAL_LABReport, GRE_LABReport, etc.

Electrical Inventory LAB Report North Central - Rhinelander

Filter	(Quantity On Hand WAL amount > 0)
Working Set Filter	((\Material Type is equal to "Electrical Material") And (\Commodity Code Description\Active = yes))
Sort	Commodity Code Description
Group By	<Not Applicable>

Electrical Inventory LAB Report

Commodity Code	Commodity Code Description	Qty/Unit	Cost Each	Total Value
32010031019	ANCHOR, RAWL STUD, 3/4 in X 7 in, #7446, DO NOT			
28574010605	ANCHOR, SCREW-IN, ROUND ROD, 7 ft, 8 in - 10 in HELIX			
55089012180	BACKPLATE, 3 SEC, 12 in MCCAIN	10.00 ea		0.00
55089040008	BACKPLATE, 3 SEC, 12 in TCT	0.00 ea		0.00
55089031272	BACKPLATE, 3M 3 SEC. 12 in BLACK			
55089031271	BACKPLATE, 3M 4 SEC. 12 in BLACK			
55089012188	BACKPLATE, 5 SEC, 12 in EAGLE/LFE AUTOMATIC SIGNAL	9.00 ea		0.00
55089040006	BACKPLATE, 5 SEC, 12 in TCT	74.00 ea		0.00
55089012184	BACKPLATE, 5 SEC, MC CAIN	4.00 ea		0.00
28506000026	BALLAST, 150W, 120/208/240/277V, G.E. inHIDFIXER in	17.00 ea	69.48 ea	1,181.16
28506000029	BALLAST, 150W, 480V, G.E. inHIDFIXER in, REPL KIT, A			
28506040243	BALLAST, 1000W, 480V, HOLOPHANE CAT.			

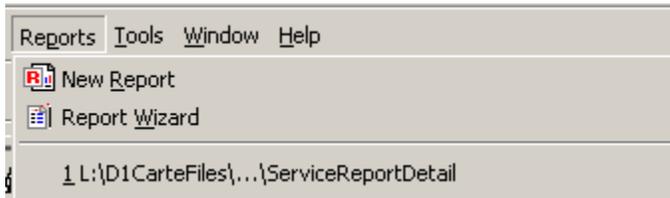
WORKdirector Training Guide

Standard Reports

The standard reports that have been written are located on your C:\Carte Files\D#Work Director-Elec\Reports folder. They are downloaded using SyncClient. As new reports are created an email will be sent out that tells you to do a new download. SyncClient will also be used to download new or modified forms and filters.

Running Reports

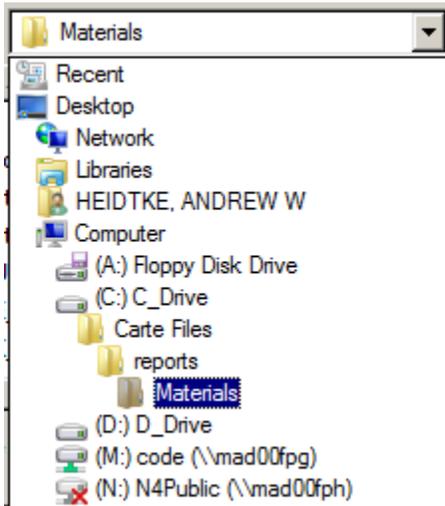
1. From WORKdirector or SignalView click on the Reports Menu option in the Tool Bar.
2. A list of previously run reports may appear in the list.



3. If the report you want is not in the list choose More Reports from the Reports Menu

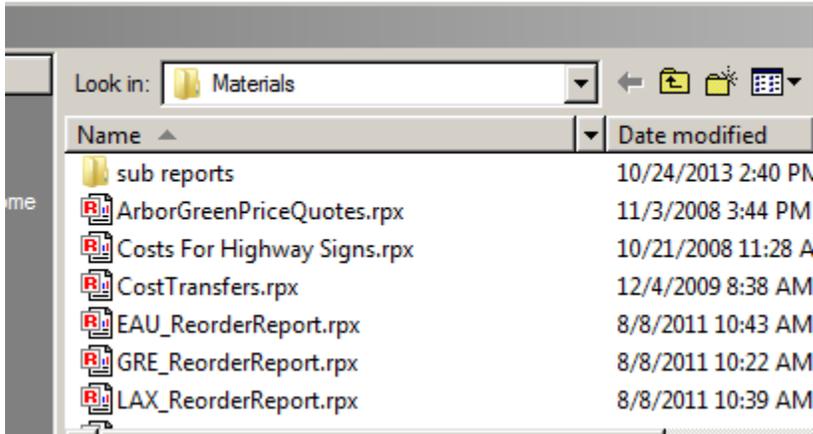


4. Navigate to your report directory on C:\Carte Files\reports\Materials or C:\Carte Files\reports\Signal Groups or C:\Carte Files\reports\Work Orders



5. A list of available reports will display.

WORKdirector Training Guide

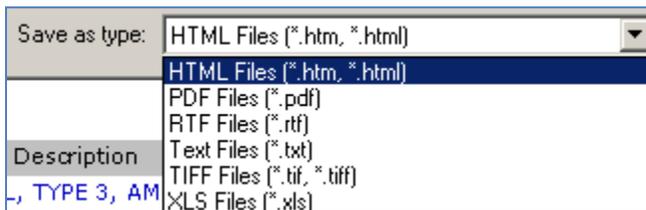


6. Select the report from the list and click Open.
7. The report will generate on your screen.
8. It can then be printed or saved to a file for later reference.

Print the report.  Print...

Export the report to a file. 

9. If you click the Export  button you will be asked to supply a file type, file location and file name.
10. File types available are:

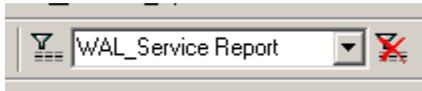


11. Saving a file as a PDF (*.pdf) saves it in Adobe format and it suitable as an attachment in an email.
12. Saving a file as an XLS (*.xls) format allows you to open it in Excel for further formatting or sorting.

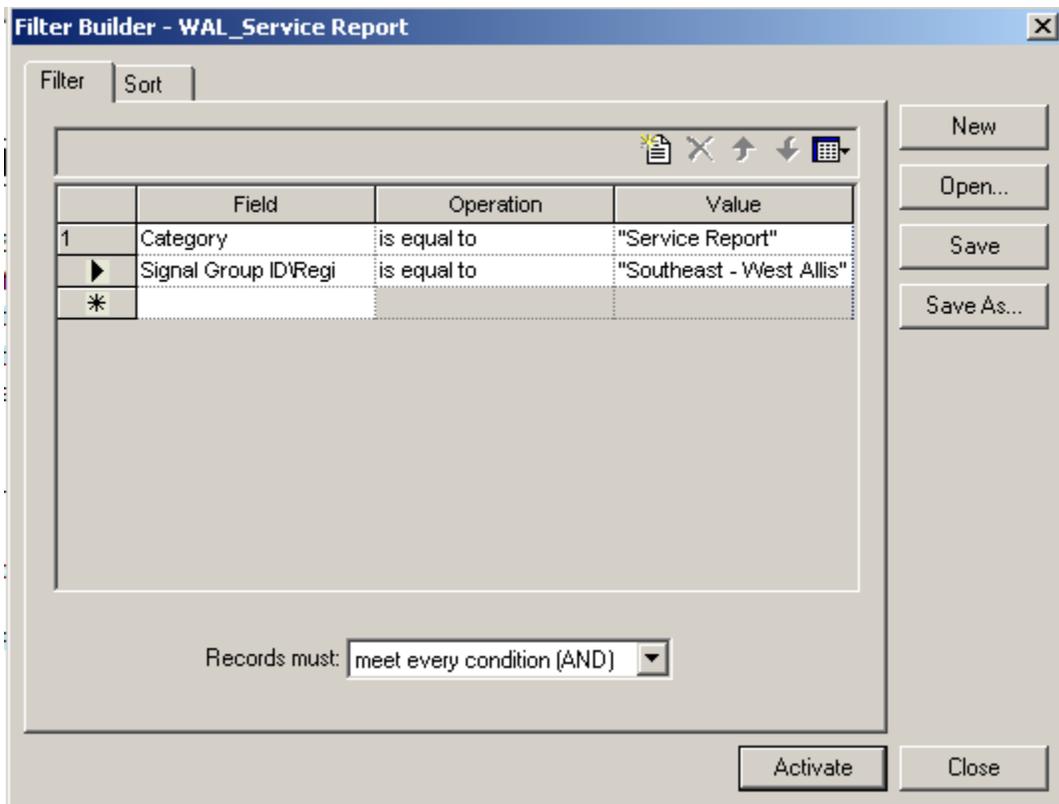
WORKdirector Training Guide

Filter Builder Introduction

The Filter Builder allows you to create and edit custom filters to select and sort records.



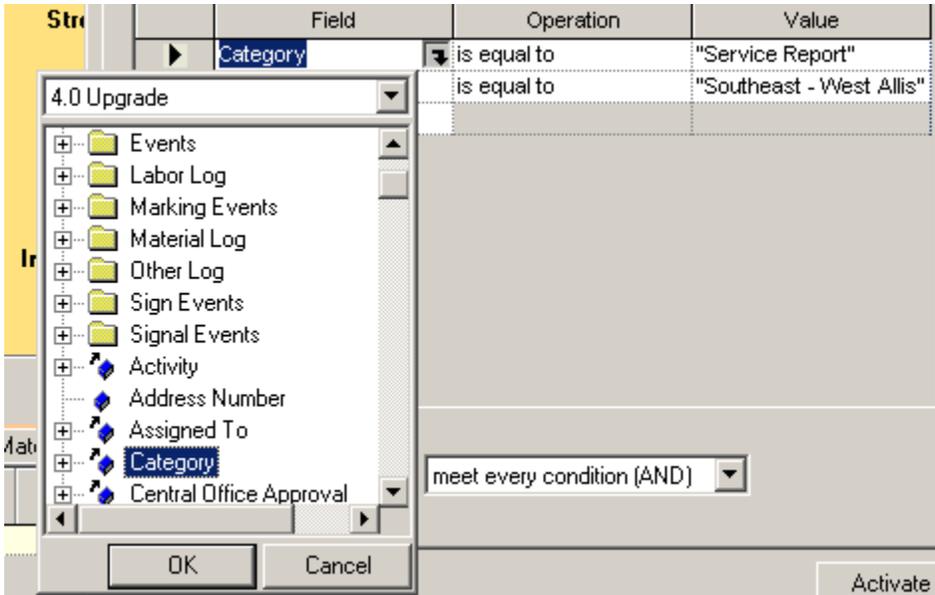
The filter contains criteria - statements of what you are looking for. [Working sets are always applied to the data first, before any other filters are applied. Standard Working Sets were installed during installation and should not be modified.](#) Record contents are compared to the criteria starting with the top line of the filter and going down the list. When a record meets the criteria, it is selected as part of the filtered list. Each line in the filter is a selection process. More lines mean more selections - and fewer records in the filtered list.



WORKdirector Training Guide

- **Filter Builder - Select Fields**

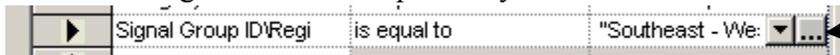
Select fields to be included in your filter with a double click. Only fields can be placed in a filter. Fields are indicated with a blue diamond.



- **Filter Builder - Select Value**

If your custom filter always selects records based on the same value, type it in the value section of the grid.

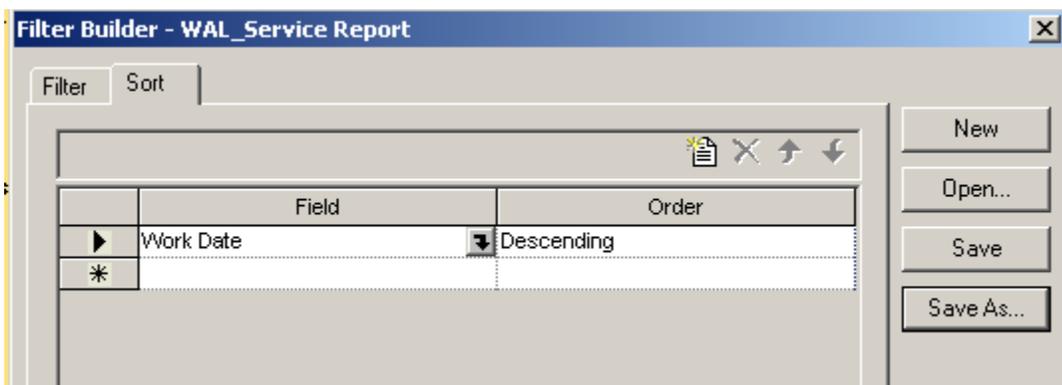
When filtering based on lookup fields you can select values from a list by clicking on the ... icon



To create a prompt so that you specify the value used in the filter, enter the following in the 'value' section: `?"fieldname: "` where fieldname is the same name as the field selected.

- **Filter Builder - Sort Tab**

The filter builder contains a tab that stores sort information. These sort parameters will be applied to all records in the filtered set. A filter is not necessary to use a sort.

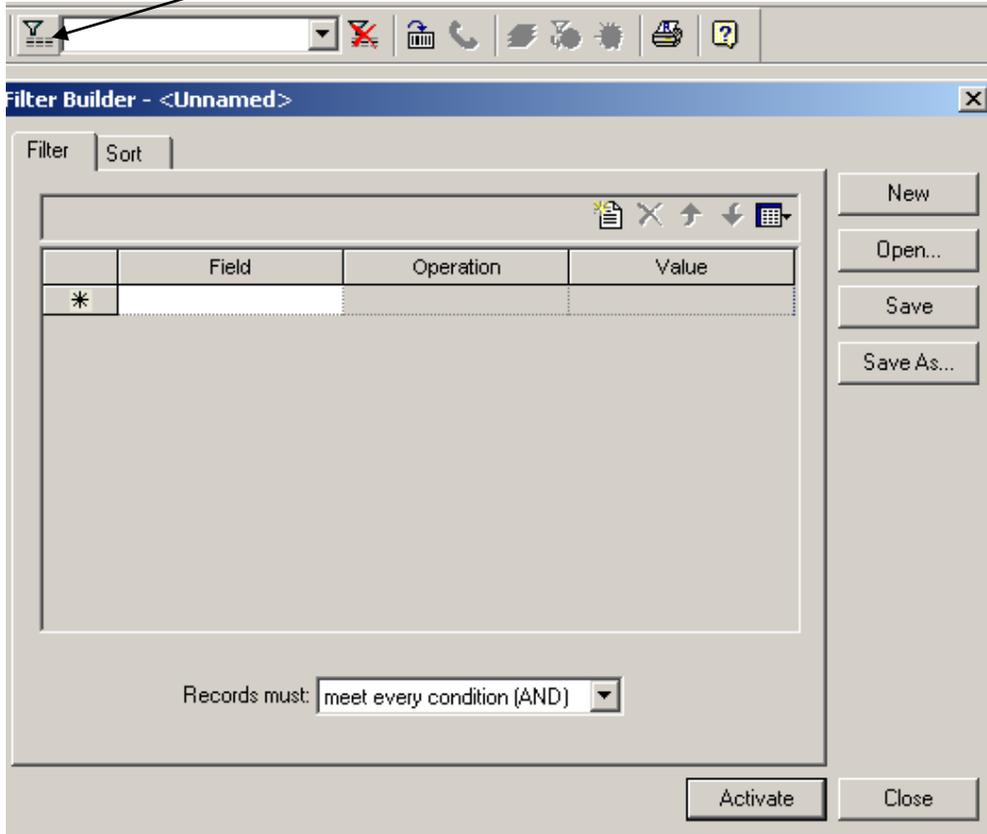


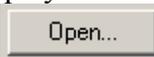
WORKdirector Training Guide

- **Filter Builder at a Glance**

Building a custom filter is a step by step process:

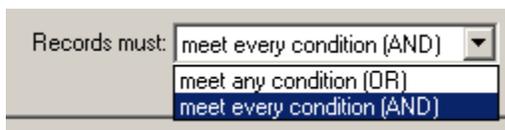
1. Launch Filter Builder.



2. The Filter Builder window is displayed.
3. To modify a stored filter, click. 
4. To create a new filter, click. 
5. Select a field.
6. Select an operation.
7. Select a value.
8. Repeat steps 5 - 7 for each condition in the filter.
9. Choose logic for "Records Must..." (AND, OR)

NOTE:

Filters are located on your C:\Carte Files\D#WORKdirector-Elec\Filters\ folder and new filters should also be saved to this location.



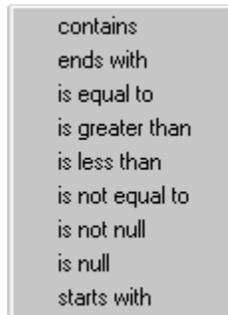
10.  or  if desired.
11. Click  to filter the records with the filter and sort you just created

WORKdirector Training Guide

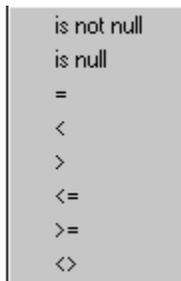
- **Filter Builder Operations**

The "Operation" used is the comparison made to the value in the selected field. The actual comparison made depends on the type of field selected. "Is Null" will create a filter based on whether the field is blank. "Is Not Null" creates a filter based on whether the field contains a value.

Text field operations include special comparisons that let you look for part of a text string.



Numeric field operations make mathematical comparisons.



WORKdirector Training Guide

Date field operations offer a wide variety of date comparisons.

is after	is through
is after today	is through today
is after [] days ago	is today
is after [] days from now	is within last [] days
is after [] months ago	is within last [] months
is after [] months from now	is within last [] years
is after [] years ago	is within next [] days
is after [] years from now	is within next [] months
is before	is within next [] years
is before today	
is before [] days ago	
is before [] days from now	
is before [] months ago	
is before [] months from now	
is before [] years ago	
is before [] years from now	
is from	
is from today	
is not null	
is not on	
is not within last [] days	
is not within last [] months	
is not within last [] years	
is not within next [] days	
is not within next [] months	
is not within next [] years	
is null	
is on	

- **Create Filters on the Fly**

You can create simple filters on the fly without using the filter builder. There are several filter operations that can be used.

1. You must be viewing a record to create new filters. You can use either a form or record control view as a starting point for creating filters on the fly.
2. Navigate to a record that contains values the filter will use in the criteria.
 - Right-click on the field
 - OR Click in the field to be used for the criteria.
4. Click  **By Value** to select records containing the value in the current field.
5. OR Click  **Prompt for Value...** to select records containing the value you enter when the filter is activated.
6. OR Click  **Excluding Value** to select records that do NOT contain the value in the current field.

WORKdirector Training Guide

Move Inventory Command – SignalView

When equipment is moved from a signal group in the field to the regional electrical shop or the central office electrical shop a “Move Inventory” transaction needs to be created.

The following instructions refer to performing the Move Command while in WORKdirector as opposed to using a standalone copy of SignalView.

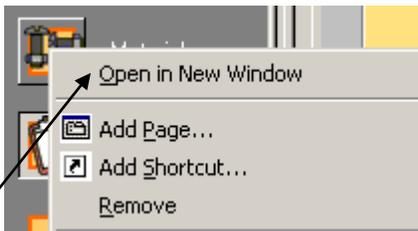
Open SignalView (Open in a new window)

Select SignalView from the Navigator Bar.



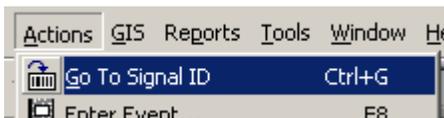
Tip! Running an application in a new window.

- You can have both **Work Orders** and **SignalView** running at the same time.
- If you already have Work Orders open point to the SIGNALView icon and click your **Right** mouse button.
- Select **Open in new Window**
- There will now be two instances of CarteGraph running on your machine and you can move between them as you like.



Creating the Move Transaction

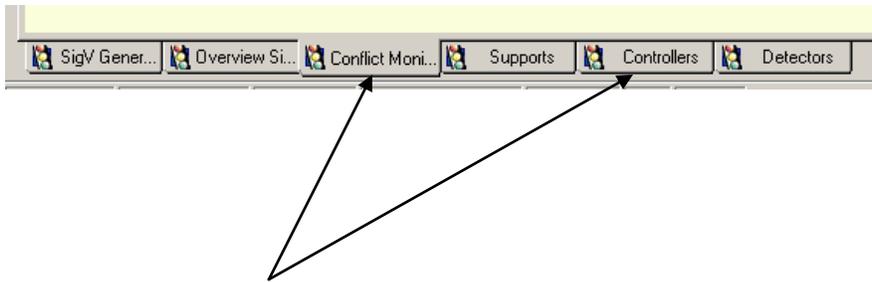
1. Go to the Signal Group that has the equipment to be moved.
 - Actions
 - Go To SignalID
 - Or Ctrl+G



WORKdirector Training Guide

2. Enter the Signal Group number.
3. Click OK.

4. Select the appropriate form for the type of equipment that is being moved.
 - Controller Form
 - Conflict Monitor Form



Select the appropriate form.

1. Select **Actions** from the menu and then **Move Inventory**.

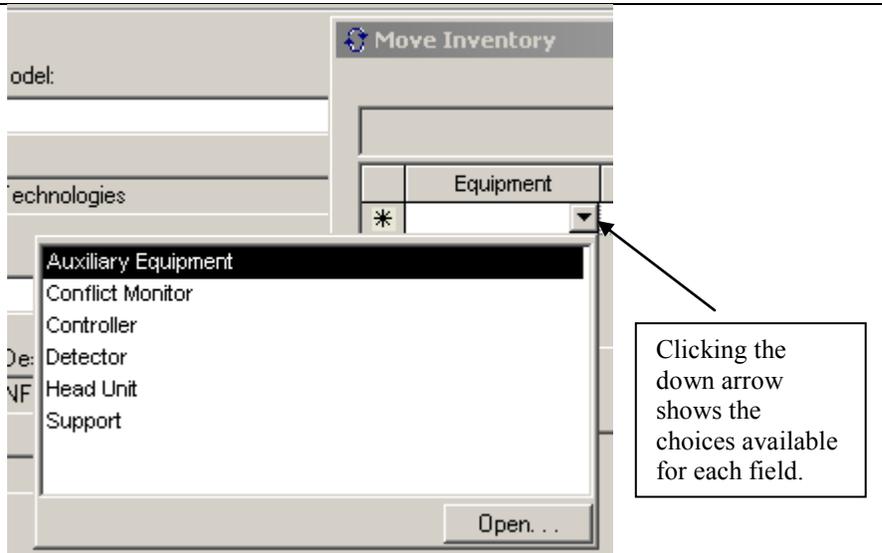


2. Fill in the Move Inventory dialogue box.
 - Equipment
 - From Signal
 - ID
 - To Signal

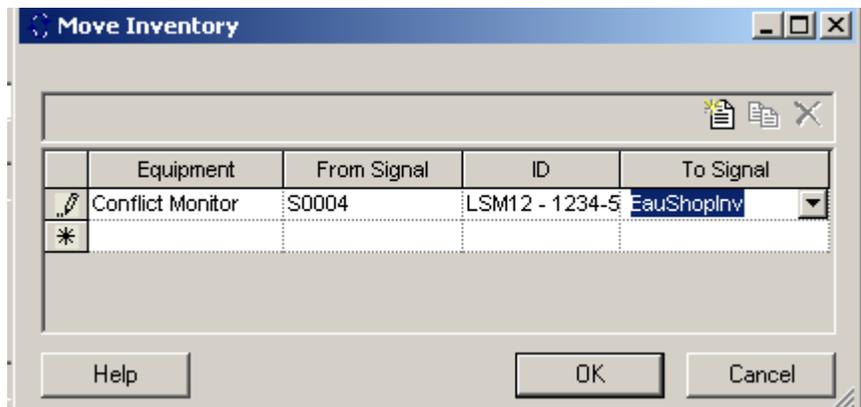
	Equipment	From Signal	ID	To Signal
*				

WORKdirector Training Guide

- Each of the fields will display values by clicking on the down arrow.
 - In this example the Equipment choices are displayed.



- Complete all of the fields on the Move Inventory window and click OK.



This procedure will automatically “move” the specified equipment and all its historical events from the signal site you were on to the signal site you have selected in the “To Signal”. You would then have to repeat this “Move Inventory” procedure to move another controller from your stock to this installation record.

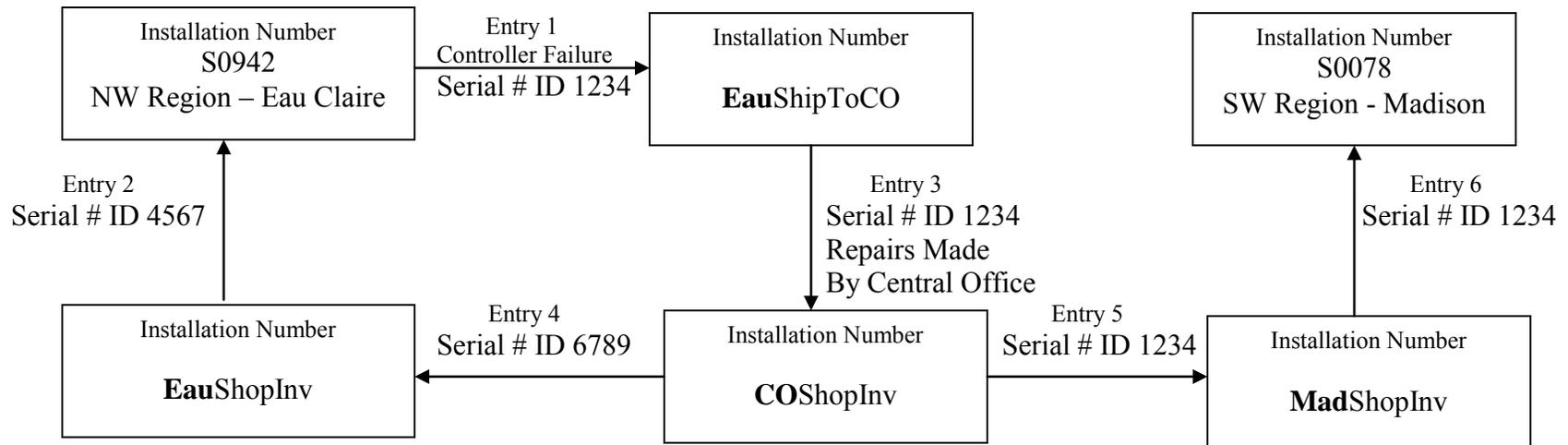
The following 3 pages display detailed workflow for two different Move scenarios.

WORKdirector Training Guide

Move Inventory Work Flow

Scenario 1

- Failed Controller in the Field



1. Eau Claire electricians find a faulty controller at S0942. In SignalView, they will go to “Actions” on the Menu bar, then hit “Move Inventory”. They will identify they are moving Equipment, a controller with an ID of 1234, from signal S0942 to “signal” EauShipToCO. Within a day or two, they then physically ship the controller to Central Office Electrical Shop for repair.
2. Eau Claire electricians need to replace the controller that was bad. They would take a controller out of their in-stock inventory. They make a second entry in SignalView to “Move” controller ID 4567 (in this example) from “signal” EauShopInv to signal S0942.
3. The Central Office Electrical Shop repairs the faulty controller and then goes into SignalView and “Moves” controller ID # 1234 from “signal” EauShipToCO to “signal” COShopInv, their in stock inventory of good / tested equipment.
4. In order to replenish the stock of good controllers for the Eau Claire shop, Central Office Electrical will send either the same or likely a different controller to Eau Claire. They would “Move” controller ID 6789 (in this example) from COShopInv to EauShopInv. This is the Eau Claire Electrical Shop in stock inventory of good / tested equipment.
5. Central Office Electrical has already repaired controller ID # 1234. Sooner or later they might get a call from the Madison (or other) Electrical shop indicating they need to replenish their stock of controllers. Central Office Electrical Shop would then “Move” controller ID # 1234 from COShopInv to MadShopInv.

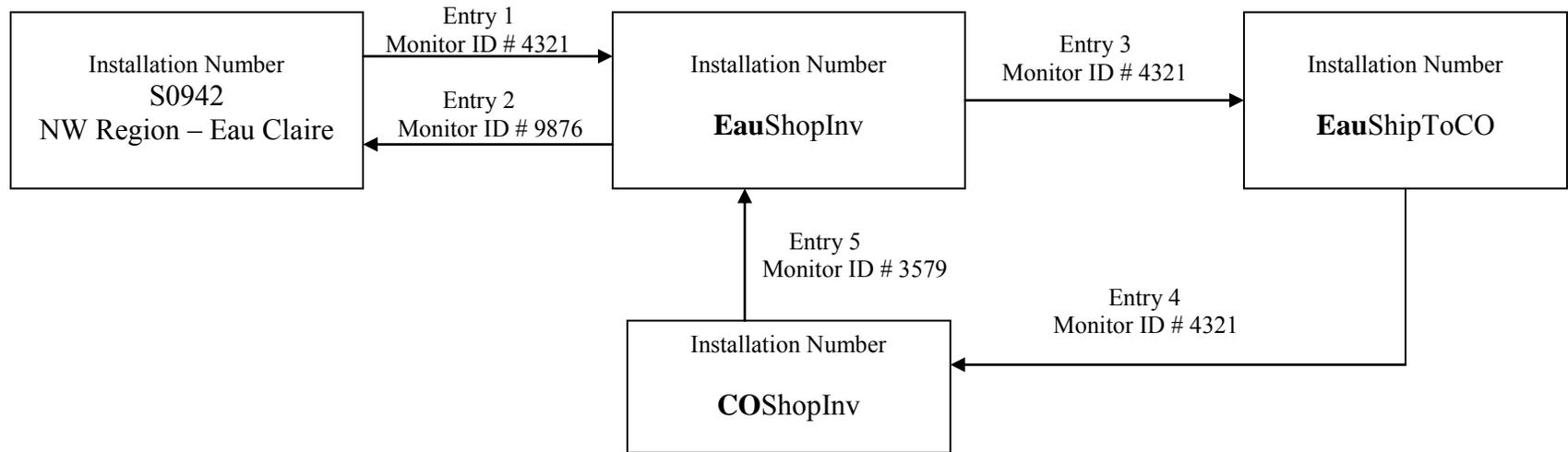
WORKdirector Training Guide

6. When the need arose, the Madison Electrical shop would “Move” controller ID # 1234 from their shop to the field. In this example, they would “Move” controller ID # 1234 from MadShopInv to signal S0078.

WORKdirector Training Guide

Move Inventory Work Flow

Scenario 2 Monitor Check



1. The Eau Claire Electrical Shop is in the process of testing monitors. Their typical procedure might be to remove the monitor from a signal location, install a conflict monitor of similar type and take the old monitor back to the shop for testing. In SignalView, they would “Move” monitor ID # 4321 from S0942 to EauShopInv.
2. Eau Claire electricians would then install a monitor from their in-stock inventory. They would “Move” (in this example) monitor ID # 9876 from EauShopInv to S0942.
3. In this example, Eau Claire electricians tested the monitor they took out of S0942 and found it did not pass. They then shipped the bad monitor to Central Office Electrical for repair. In SignalView, they would “Move” monitor ID # 4321 from EauShopInv to EauShipToCO.
4. Central Office Electrical, upon receipt of the bad equipment, would test and repair it. *After* it was certified to be in working order, In SignalView, they would “Move” monitor ID # 4321 from EauShipToCO to COShopInv.
5. As in the previous scenario, upon knowing that Eau Claire had sent them a monitor in need of repair, Central Office Electrical would send Eau Claire a good monitor in exchange. In SignalView, they would “Move” monitor ID # (in this example) 3579 from COShopInv to EauShopInv.

WORKdirector Training Guide

WORKdirector Training Guide

ACCESS TO SIGNALVIEW FROM WORKDIRECTOR

SignalView data can be updated from WORKdirector without having to open SignalView itself. The ‘gateway’ to the signal site’s data is by opening the “Signal Groups” recordset. Data that can be updated from this ‘gateway’ include:

- Attachments
- Cabinets / Auxiliary Equipment / Inspections
- Conflict Monitors / Depreciations/ Failure Logs/ Inspections/ Maintain Conditions
- Controllers/ Depreciations/ Failure Logs/ Inspections/ Maintain Conditions
- Detectors/ Depreciations/ Inspections/ Maintain Conditions
- Supports/ Arms/ Auxiliary Equipment/ Depreciations/ Head Units/ Inspections/ Luminaires/ Maintain Conditions

People familiar with SignalView will recognize that each of these areas correspond to a form in SignalView.

To open SignalView from WORKdirector you should complete and save the Service Report first. Next you access the signal’s information by opening Signal Groups from the Signal Group ID: field.

Example 1 Updating Controller Information

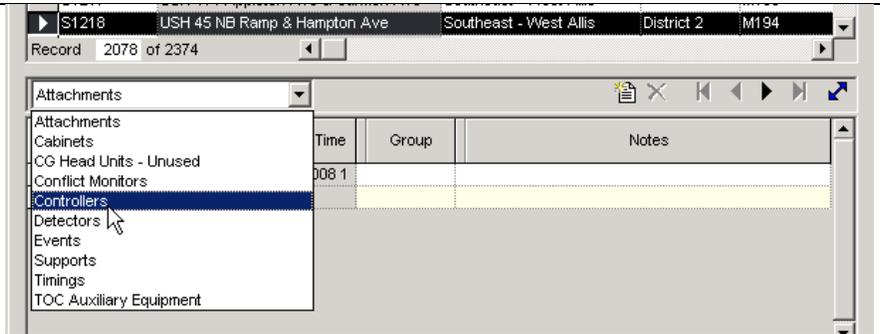
- From the Signal Group ID field click on the down arrow.
- Then click on the Open button.

- The Signal Groups library will open.
- Make sure that you have selected the correct Site ID that is on the Service Report.
- It will be highlighted in black shading.

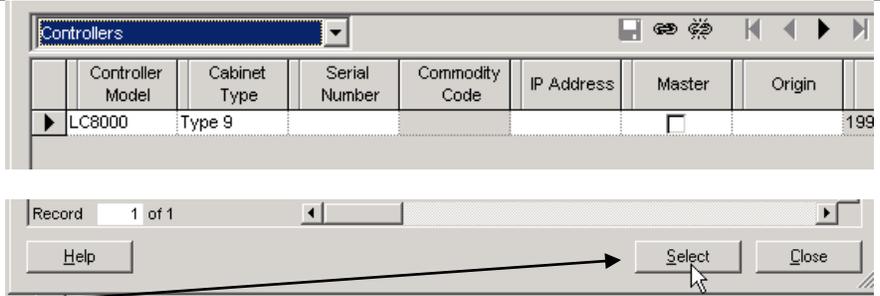
Installation Number	Installation Site ID	Region	District	Old Installation
S1210	STH 100 / Ryan Rd & 60th St	Southeast - West Allis	District 2	M186
S1211	STH 100 / Ryan Rd & 51st St	Southeast - West Allis	District 2	M187
S1212	STH 341 / Miller Parkway & Miller Park N	Southeast - West Allis	District 2	M188
S1213	STH 341 / Miller Parkway & Miller Park N	Southeast - West Allis	District 2	M189
S1214	USH 45 / IH 894 & Beloit Rd SB Ramp	Southeast - West Allis	District 2	M190
S1215	USH 45 / IH 894 & Beloit Rd NB Ramp	Southeast - West Allis	District 2	M191
S1216	STH 794 / Lake Pkwy & Ellen St	Southeast - West Allis		M192
S1217	USH 41 / Appleton Ave & Carmen Ave	Southeast - West Allis		M193
S1218	USH 45 NB Ramp & Hampton Ave	Southeast - West Allis	District 2	M194

WORKdirector Training Guide

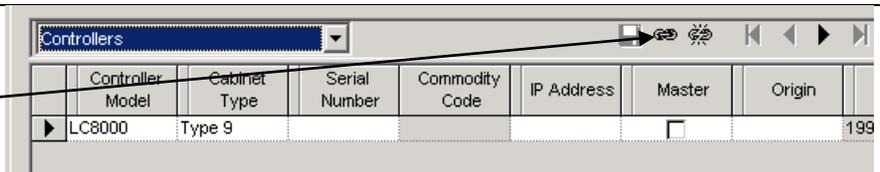
- On the lower portion of the form click the down arrow and select the component you wish to add or modify.
 - In this example we will modify a controller model.
 - Click on Controllers.



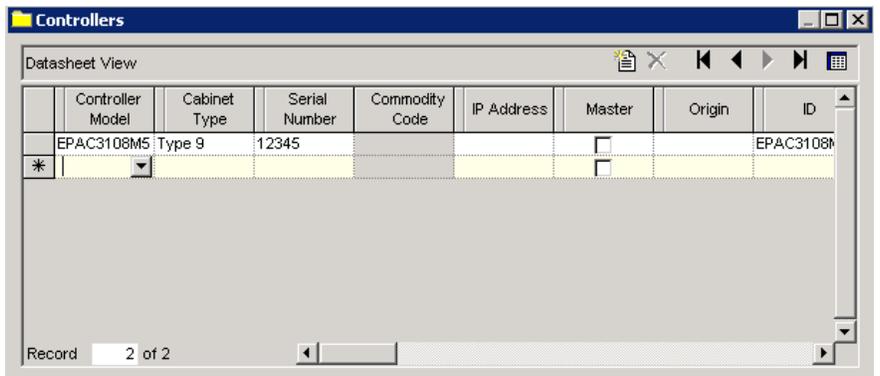
- The existing Controller information will now display.
- This information can be updated, e.g. change the Controller Model or update a serial number.
- Once the data is complete click on the Select button to save the record and close the window.



- To add a new record you would click the "Chain" to bring up a blank Controller form.
- On the Controllers form fill in the necessary data fields - Model and Serial Number.



- Click on the Select button at the lower portion of the form to add this Controller to the installation.



WORKdirector Training Guide

- **NOTE:**
- If there is a controller or other equipment at this location that needs to be moved you need to use the **Move Command** (see page 39 of this manual).

Example 2 Updating Head Units

- Open the Signal Groups library from the Signal Group ID field on the Service Report (see page 45).
- Make sure that you have selected the correct Site ID.
- It will be highlighted in black shading.

Signal Group ID:

Signal Groups

Datasheet View

	Installation Number	Installation Site ID	Region	District	Old Installation
	S1210	STH 100 / Ryan Rd & 60th St	Southeast - West Allis	District 2	M186
	S1211	STH 100 / Ryan Rd & 51st St	Southeast - West Allis	District 2	M187
	S1212	STH 341 / Miller Parkway & Miller Park N	Southeast - West Allis	District 2	M188
	S1213	STH 341 / Miller Parkway & Miller Park N	Southeast - West Allis	District 2	M189
	S1214	USH 45 / IH 894 & Beloit Rd SB Ramp	Southeast - West Allis	District 2	M190
	S1215	USH 45 / IH 894 & Beloit Rd NB Ramp	Southeast - West Allis	District 2	M191
	S1216	STH 794 / Lake Pkwy & Ellen St	Southeast - West Allis		M192
	S1217	USH 41 / Appleton Ave & Carmen Ave	Southeast - West Allis		M193
▶	S1218	USH 45 NB Ramp & Hampton Ave	Southeast - West Allis	District 2	M194

Record 2078 of 2374

Attachments

- On the lower portion of the form click the down arrow and select "Supports".

▶ S1218 USH 45 NB Ramp & Hampton Ave

Record 2078 of 2374

Attachments

- Attachments
- Cabinets
- CG Head Units - Unused
- Conflict Monitors
- Controllers
- Detectors
- Events
- Supports
- Timings
- TOC Auxiliary Equipment

- The Support data will now display.

Supports

	Location	Plan Location -	Commodity Code Description	Pole Type	Base Type	Placeme
▶	EBFR	SB01	POLE, 20 ft ALUMINUM, TYPE 2	T2	T2	Pork Chop
	EBLTFR	SB07	POLE, 30 ft STEEL, GALVANIZED, TYPE V	T3	T2	Median Isle
	EBLTNR	SB04	STANDARD, TRAF SIG, 15 ft X 4 in ALUM,	Standard	T1	Median Isle
	EBNR	SB03	STANDARD, TRAF SIG, 13 X 4 in ALUM, UN	Standard	T1	Quadrant
	NBFL	SB05	POLE, 20 ft ALUMINUM, TYPE 2	T2	T2	Quadrant
	NBFR	SB06	STANDARD, TRAF SIG, 13 X 4 in ALUM, UN	Standard	T1	Quadrant

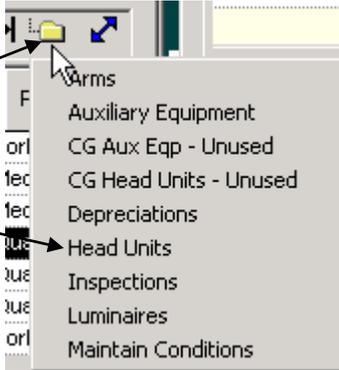
WORKdirector Training Guide

- Select the Location of the support you want to modify. In this example I have chosen EBNR.

Location	Plan Location	Commodity Code Description	Pole Type	Base Type	F
EBFR	SB01	POLE, 20 ft ALUMINUM, TYPE 2	T2	T2	Port
EBLTFR	SB07	POLE, 30 ft STEEL, GALVANIZED, TYPE V	T3	T2	Mec
EBLTNR	SB04	STANDARD, TRAF SIG, 15 ft X 4 in ALUM,	Standard	T1	Mec
EBNR	SB03	STANDARD, TRAF SIG, 13 X 4 in ALUM, UN	Standard	T1	Que
NBFL	SB05	POLE, 20 ft ALUMINUM, TYPE 2	T2	T2	Que
NBFR	SB06	STANDARD, TRAF SIG, 13 X 4 in ALUM, UN	Standard	T1	Que
NBNR	SB02	STANDARD, TRAF SIG, 13 X 4 in ALUM, UN	Standard	T1	Port

- Now click on the Folder Icon at the top of the form to open additional sub-windows.

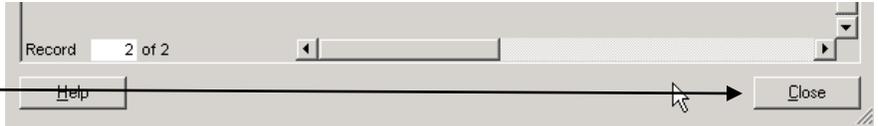
- Click on Head Units to open the sub-form.



- The Head Units data can now be modified.

Location	Commodity Code Description	LED/Lamp	Shield Type	ADA Compliant	Color
EBNR	SIGNAL HEAD, 12 in MCCAIN 3 SE	LED	Cutaway	<input type="checkbox"/>	

- When data entry is complete click on the Close button at the bottom of the sub-form.



- Click Close again to return to the Service Report

WORKdirector Training Guide

Example 3 Adding or Modifying Cabinet Inspections

- Open the Signal Groups library from the Signal Group ID field on the Service Report (see page 45).
- Make sure that you have selected the correct Site ID.
- It will be highlighted in black shading.

Signal Group ID:

Installation Number	Installation Site ID	Region	District	Old Installation
S0692	STH 441 (Tri-County) & CTH KK (Calumet	Northeast - Green Bay	District 3	
S0693	STH 25 & Cedar Falls Rd	Northwest - Eau Claire	District 6	
S0694	STH 13 & Allman St	Northwest - Eau Claire	District 6	
S0701	CTH OS & Marco Rd / Market Place	Southwest - La Crosse	District 5	
S0702	STH 54 & IH 94 West Ramp	Northwest - Eau Claire	District 6	
S0703	STH 54 & IH 94 East Ramp	Northwest - Eau Claire	District 6	
S0704	USH 10 & STH 32/57 (Forest Jct)	Northeast - Green Bay	District 3	
S0705	USH 8 & CTH G	North Central - Rhinelander	District 7	
S0707	STH 23 & STH 49 & CTH A	North Central - Wisconsin R	District 4	

- On the lower portion of the form click the down arrow and select "Cabinets".

Record 2078 of 2374

S1218 USH 45 NB Ramp & Hampton A

Cabinets

- Attachments
- Cabinets**
- CG Head Units - Unused
- Conflict Monitors
- Controllers
- Detectors
- Events
- Supports
- Timings
- TOC Auxiliary Equipment

- The Cabinet data will now display.

Signal Groups

Datasheet View

Installation Number	Installation Site ID	Region	District	Old Installation
S0692	STH 441 (Tri-County) & CTH KK (Calumet	Northeast - Green Bay	District 3	S0692
S0693	STH 25 & Cedar Falls Rd	Northwest - Eau Claire	District 6	S0693
S0694	STH 13 & Allman St	Northwest - Eau Claire	District 6	S0694
S0701	CTH OS & Marco Rd / Market Place	Southwest - La Crosse	District 5	S0701
S0702	STH 54 & IH 94 West Ramp	Northwest - Eau Claire	District 6	S0702
S0703	STH 54 & IH 94 East Ramp	Northwest - Eau Claire	District 6	S0703
S0704	USH 10 & STH 32/57 (Forest Jct)	Northeast - Green Bay	District 3	S0704
S0705	USH 8 & CTH G	North Central - Rhinelander	District 7	S0705
S0707	STH 23 & STH 49 & CTH A	North Central - Wisconsin R	District 4	S0707

Record 1656 of 2374

Cabinets

Cabinet Type	Cabinet Manufacturer	Cabinet Material	Auxiliary Output	Backup Power	Cabinet Photocell	Hand Control
Type 9	Control Technologies	Aluminum	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
*			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

WORKdirector Training Guide

- Now click on the Folder Icon at the top of the form to open additional sub-windows.
- Click on Inspections to open the sub-form.
- New Inspection data can now be added on the next available line.
- Be sure to click off of the line to a blank line to save your data.
- When data entry is complete click on the Close button at the bottom of the sub-form.
- Click Close again to return to the Service Report

Cabinet Type	Cabinet Manufacturer	Cabinet Material	Auxiliary Output	Backup Power	Cabinet Photocell	Hand Control
Type 9	Control Technologies	Aluminum	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



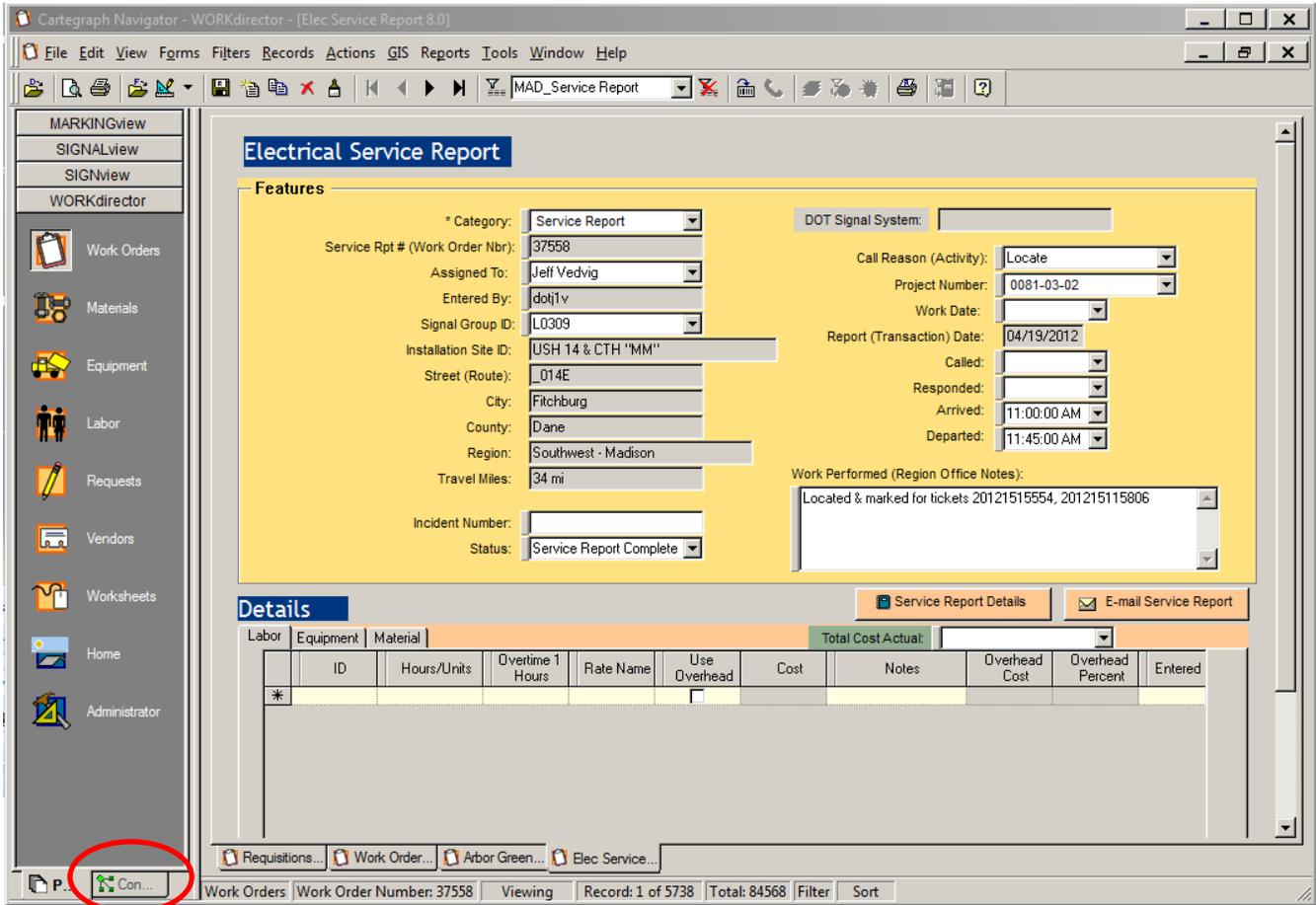
Date	Notes	Cabinet Input Voltage	Cabinet Current Draw	Load Switch Output	Check Cabinet Flasher
09/20/2007	timing sheet dated 9/30/98	125.3 ac	4.4 ac	125 ac	<input checked="" type="checkbox"/>
06/11/2008		125 ac	2.3 ac	124.2 ac	<input checked="" type="checkbox"/>
07/14/2009		123.2 ac	2.2 ac	122.1 ac	<input checked="" type="checkbox"/>
*					<input type="checkbox"/>

Record 4 of 4

Help Close

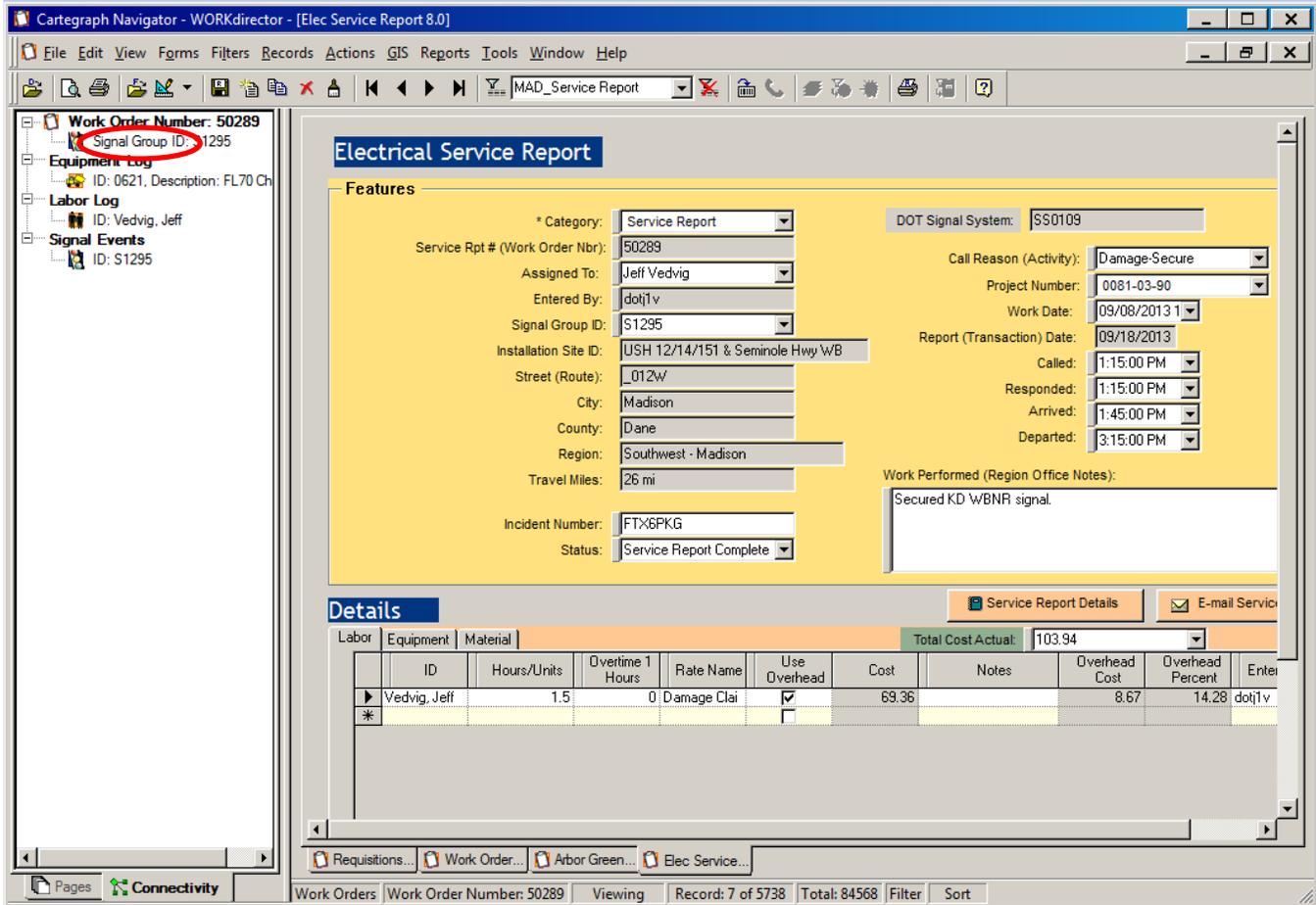
WORKdirector Training Guide

The Connectivity Page

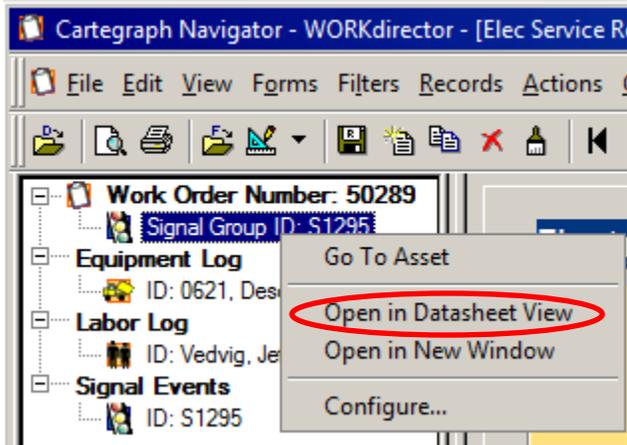


The connectivity page will allow you to access Signal Group information without having SIGNALview running.

WORKdirector Training Guide

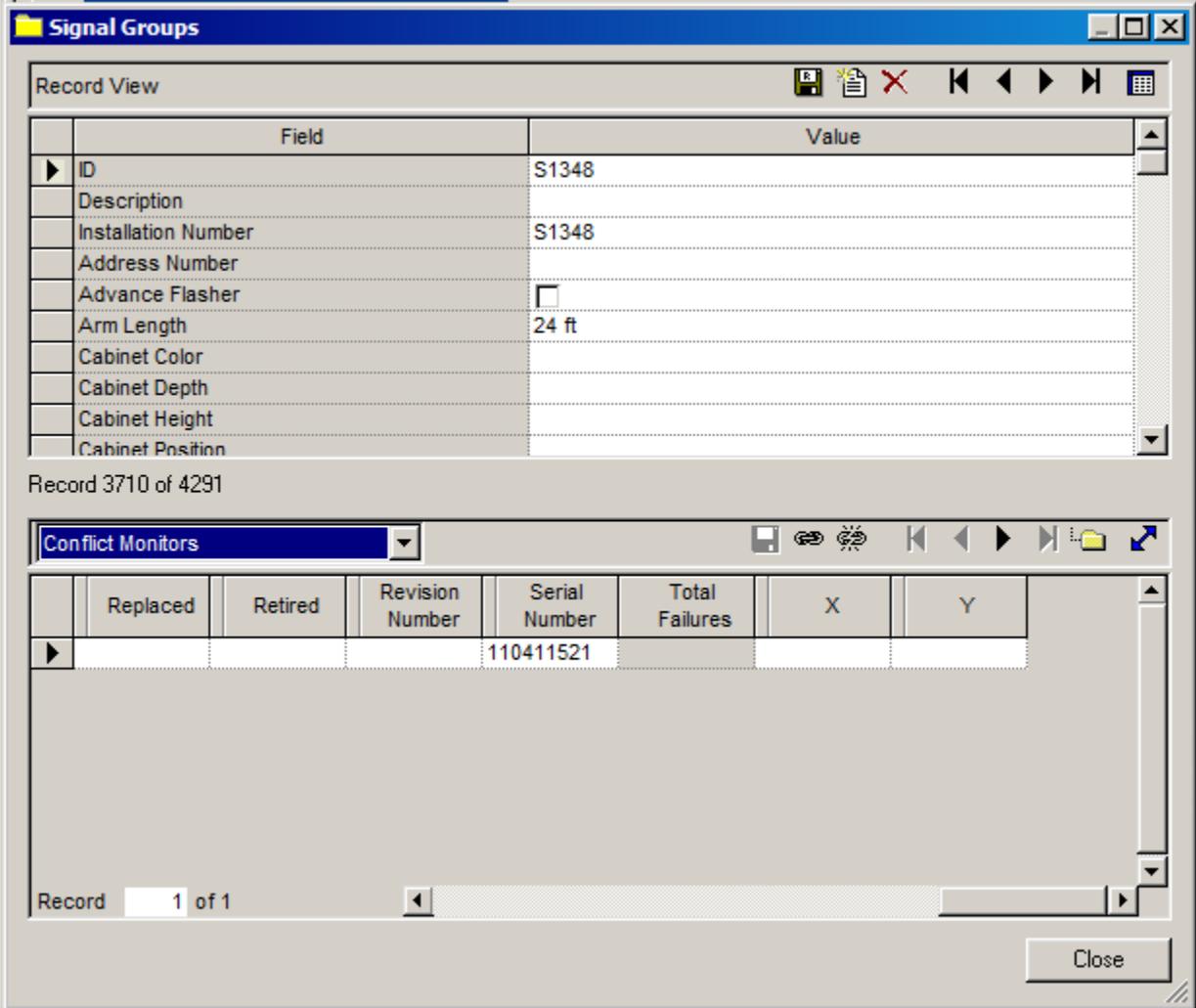


You can see the Signal Group that is attached to this service report. By right clicking on the **Signal Group ID** you will see this menu come up:



If you select **Open in Datasheet View** this screen will pop up:

WORKdirector Training Guide



On this screen you are able to change information on the signal record. You can associate and disassociate records just like you would in SIGNALview.