How to Create a Work Order for an Electrical Installation or Ramp Gate

References:
How to Modify Electrical Asset Data

* Use of the New Copy button on the Manage Work Orders dialog box when creating a work order is strongly discouraged. *

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How to Create a Work Order for an Electrical Installation or Ramp Gate:

A. Navigate to a New Work Order

1. Access VueWorks using the following link: https://toams.wi.gov/VUEWorks
2. Log into TOAMS using your WAMS credentials.

3. Navigate to associated installation using the data viewer (lower left) portion of the screen. First, select **Electrical Installations** from the drop-down, **UNLESS** you are creating a work order for a ramp gate. Select **ITS Installation** if the asset is a ramp gate.

4. Type the Installation ID into the **Installation ID** field. As you begin typing in this field, the drop-down list will begin to filter down to IDs matching your text. You may type the number in its entirety, or you can start typing and then use the drop down to select the ID. Once the complete ID is typed or selected from the drop down, click **Select**.
5. A new window will appear in the Data Viewer panel. Using the drop-down at the top of the panel, select Facilities.

6. The Data Viewer panel will update again. To open the Manage Facilities window, click on the text for the Installation ID. **DO NOT CLICK ON THE GREEN X!**

7. A Manage Facilities dialog box has now opened up on your screen. Using the drop-down, select Work Orders.
8. Ensure the **Include GIS Asset** box is checked, then click **New**.

![Image of Work Order Management](image)

B. **Populate Information in the Header**

9. Begin populating information into the top of the **Manage Work Orders** dialog box. While working in this dialog box, it is recommended that you **Save** often.

![Image of Manage Work Orders](image)

9.1 **Type:** This should always be set to **General**.

9.2 **Program Area:** Select **Electrical**.

9.3 **Group:** Four options are available and can be categorized as follows:

   9.3.1 **Improvement Project:** This group type is for future use.

   9.3.2 **Operational / Project Work:** This group type should be selected if the work performed addresses operational or planned equipment modifications.

   9.3.3 **Preventative Maintenance (PM) / Lifecycle:** This group type should be selected if the work performed was scheduled to prevent deterioration or failure and ensure system reliability.

   9.3.4 **Service Repair (Non-PM):** This group type should be selected if the work performed was necessary to restore to a good or sound condition after decay or damage.

9.4 **Activity Description:** The choices in this drop-down list are dynamic based upon the Group that is selected. The **Details** tab will change based upon the **Activity Description** selected. Guidance on selecting the appropriate **Activity Description** is provided in the **Details** tab by clicking **Activity Description**. Additionally, a brief description of the intended use of each **Activity Description** is included on the top left of this tab after an activity is selected.

![Image of Activity Description](image)

9.5 **Location:** This information should auto populate if you followed steps 1-8 correctly.

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9.6 **Lat/Long:** If this hasn’t auto-populated, click the icon. This will bring you to the map to locate your asset. On your screen, you will see a dialog box. You can use this dialog box to filter to Electric by using the Select From drop-down.

![Select From dialog box]

On the map, navigate to your asset and right click on the center of your asset symbol. The dialog box should update to show which asset was located. If this is the correct asset, click **Done.**

9.7 **Description:** This field can be left blank.

9.8 **Assigned To:** Click the icon. Type a name into the Select Who to Assign field. As you begin typing in this field, the drop-down list will begin to filter down to names matching your text. You may type the name in its entirety, or you can start typing and then use the drop down to select the name. Once the complete name is typed or selected from the drop down, click Assign Individual. You can also filter to a smaller list of names in the Select Who to Assign drop-down by using the Filter by Role drop down first.

![Assign Individual dialog box]

9.9 **Status:** A work order must be set to Open to make modifications to it. You may Close a work order using this drop-down once you have completed the report. Note: it may be re-opened after closing by changing this selection.

9.10 **Priority:** This dialog box can be left with its default value.

9.11 **Begin Date / Begin Time:** This is the date and time that the field work was started.

9.12 **End Date / End Time:** This is the date and time that the field work was completed.

10. Now it is time to begin populating information in the tabs on the lower half of the Manage Work Orders dialog box. To expand (or shrink) this portion of the dialog box, use the icon located above the tabs.
C. Populate Information in the Details Tab

11. The **Details** tab, which is standard for nearly all Activity Groups except for Routine PM in the Preventative Maintenance (PM)/Lifecycle Group, should be populated as follows:*  

![Image of Details tab]

11.1 **Region:** This should auto-populate with the name of the Region the identified installation is associated with.

11.2 **County:** This should auto-populate with the name of the County the identified installation is associated with.

11.3 **Project ID:** Type a project ID into the field. As you begin typing in this field, the drop-down list will begin to filter down to IDs matching your text. If the project ID has been used in a work order before, it will be available in the drop down. You may type the ID in its entirety, or you can start typing and then use the drop down to select the ID. Important note: Project ID should be entered into this field with its dashes (e.g. 0087-01-00).

11.4 **SINS Number:** This is a placeholder for future use.

11.5 **Issue:** This is a placeholder for future use.

11.6 **Incident Number:** This is the location where you can add the SINS number or the Incident Number, if applicable.

11.7 **Notes:** This is where you describe in more detail the work that was performed.

11.8 **Problem Found:** This field is only available for work orders filed under the Service Repair Group. Select from the drop-down the description that most accurately reflects the problem found in the field.

*If selected Activity Description needs to be changed after saving the Work Order, be sure to clear all data on the Details tab **before** changing Activity Description.

12. The **Assets** tab should have two records. One is the facility record and the other is the GIS record for the specified installation. Verify that both are shown. If the GIS record is missing, use the **By Selecting on Map** button to add. If the facility record is missing, use the **From Facility** button to add.

![Image of Assets tab]

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D. Populate Information in the Labor Tab

13. The **Labor** tab is used when staff hours are to be billed against the **Project ID** listed for the work order on the **Details** tab. If no labor information is required for this work order, skip to step 16. If entering labor data, be sure you are working on the sub-tab labelled **Actual**.

14. Using the left most drop-down, select the name of an **Employee**. Enter the hours worked for each pay code in the **Hours** box and then use the drop-down to select the **Pay Code** based on the following criteria:

14.1 Select **Default** if the work was completed during normal business hours.
14.2 Select **Overtime** if the work was completed while the employee was on overtime.
14.3 Select **Damage Claim** if the work was completed during normal business hours and is associated with responding to a knockdown.
14.4 Select **Damage Claim Overtime** if the work was completed while the employee was on overtime and the work is associated with responding to a knockdown.

15. Click on **Add** to create the record. Repeat steps 14 & 15 for each employee and each pay code.

E. Populate Information in the Equipment Tab

16. The **Equipment** tab is used when equipment is to be billed against the **Project ID** listed for the work order on the **Details** tab. If no equipment information is required for this work order, skip to step 19. If entering equipment data, be sure you are working on the sub-tab labelled **Actual**.
17. Using the left most drop-down, select the name of the Equipment used. Populate the remaining fields as follows:
   17.1 Rate Type: Select whether the piece of equipment selected is billed on an Hourly or a Mileage basis.
   17.2 Hours: This field is where you would enter the number of hours the piece of equipment was used OR the number of miles the equipment travelled, depending on the Rate Type selected.
18. Click Add to create the record. Repeat steps 17 & 18 for each piece of equipment used.

F. Populate Information in the Inventory Tab
19. The Inventory tab is used when inventory items are to be billed against the Project ID listed for the work order on the Details tab. If no inventory is required for this work order, skip to step 22. If entering inventory data, be sure you are working on the sub-tab labelled Estimated.

20. Click the radial button for the Entry Mode desired. The remaining steps for this tab will depend on the Entry Mode selected. If your entry mode is Item, skip to 20a. If your entry mode is Ad Hoc, skip to 20b.
   20.1 When your entry mode is Item:
      20.1.1 Click the filter icon next to the left most drop-down. In the dialog box that opens, use the Warehouse drop-down to select the warehouse the inventory came from. Click on Apply.
20.1.2 Using the left most drop-down, select an **Inventory** item. As you begin typing in this field, the drop-down list will begin to filter down to inventory matching your text. You may type the inventory name in its entirety, or you can start typing and then use the drop down to select the item. After an **Inventory** item is selected, **Charge Rate** should auto-populate.

![Inventory list and data table]

20.1.3 Add a value into the **Quantity** field.

20.1.4 Click **Add**.

20.2 When your entry mode is **Ad Hoc**:

20.2.1 Enter a description of the item into the box located under the **Entry Mode** radial buttons.

20.2.2 Add a value into the **Quantity** field.

20.2.3 Add a price into the **Charge Rate** field.

20.2.4 Click **Add**.

21. Repeat step 20 for all additional inventory items.

22. Edit and/or Delete estimated inventory items as needed.

23. Once you are confident that your inventory items and quantities are correct, click on **Copy To Actual**. This transfers your inventory to the **Actual** tab and triggers the physical inventory change in VueWorks. You can click on the **Actual** tab to verify that all of your inventory items were carried over.

24. If your work order resulted in a physical change of infrastructure that needs to be documented in the facilities module, continue to step 25. If not, skip to step 27.

25. At the bottom right of the screen you will see two separate minimized windows. Click on the **Manage Facilities** tab to switch to this dialog box (without closing the **Manage Work Orders** dialog box).
26. Make changes to your facilities record as needed. For assistance with these changes, see How to Modify Asset Data. When complete, click Save at the top of the dialog box, then click on the tab at the bottom right of the screen to return to the Manage Work Orders dialog box (without closing the Manage Facilities tab).

G. Close / Save a Work Order

27. At this point, you may wish to change your Status in the header of the form to Closed if the work order is complete. Note: You can always change the Status back to Open if you need to make changes or additions to this work order later.

28. Click Save (located at the bottom of the form). Once you have saved your record, a work order ID will be assigned to it. You can find this ID in the top left corner of the header.

29. Click Close (located at the bottom of the form) to close this window.

30. If you are finished working in VUEWorks, it is time to log out. Do this by clicking on the plus symbol next to Welcome in the menu on the left panel. This will expand this menu item. Click Log Out. This will end your session and your web interface window can be closed.