



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. **

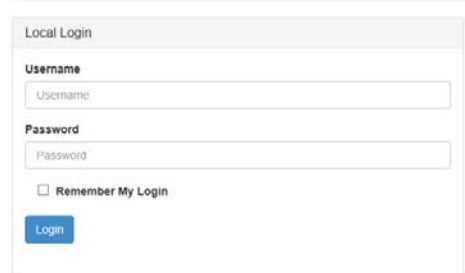
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How to Create a Work Order for an Electrical Installation or Ramp Gate:

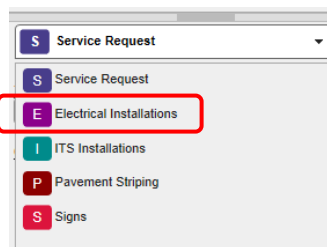
A. Navigate to a New Work Order

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

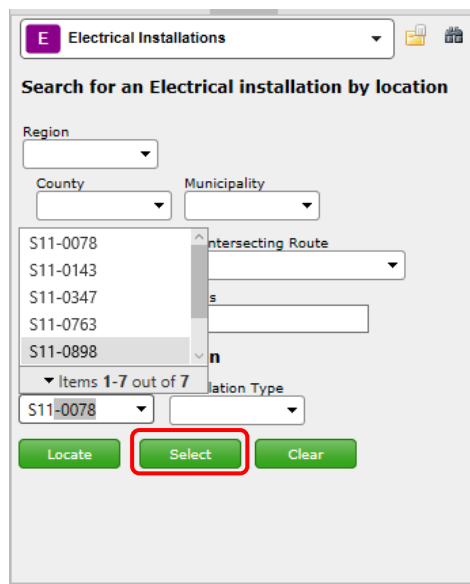
Login



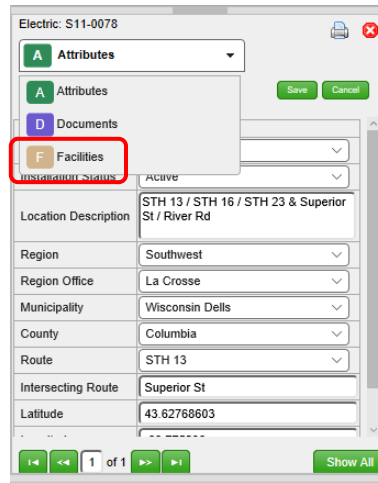
3. Navigate to associated installation using the data viewer (lower left) portion of the screen. First, select **Electrical Installations** from the drop-down, UNLESS you are creating a work order for a ramp gate. Select **ITS Installation** if the asset is a ramp gate.



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**.



- A new window will appear in the Data Viewer panel. Using the drop-down at the top of the panel, select **Facilities**.



Electric: S11-0078

A Attributes

A Attributes

D Documents

F Facilities

Installation Status: Active

Location Description: STH 13 / STH 16 / STH 23 & Superior St / River Rd

Region: Southwest

Region Office: La Crosse

Municipality: Wisconsin Dells

County: Columbia

Route: STH 13

Intersecting Route: Superior St

Latitude: 43.62768603

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Show All

- 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!**



Electric: S11-0078

F Facilities

Link New

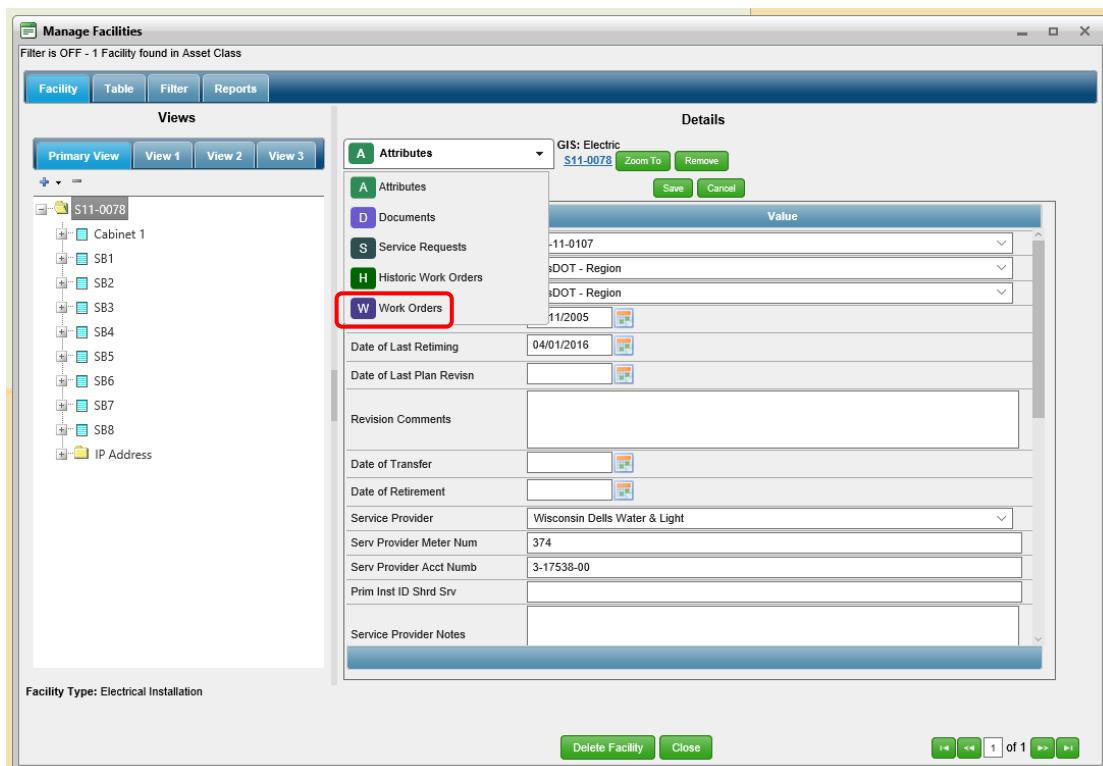
Link Existing

Linked Facilities and Facility Assets

S11-0078

Click Here

- A **Manage Facilities** dialog box has now opened up on your screen. Using the drop-down, select **Work Orders**.



Manage Facilities

Filter is OFF - 1 Facility found in Asset Class

Facility Table Filter Reports

Views: Primary View View 1 View 2 View 3

S11-0078

- Cabinet 1
- SB1
- SB2
- SB3
- SB4
- SB5
- SB6
- SB7
- SB8
- IP Address

Facility Type: Electrical Installation

Details

A Attributes

A Attributes

D Documents

S Service Requests

H Historic Work Orders

W Work Orders

GIS: Electric

S11-0078

Zoom To

Remove

Save

Cancel

Value

-11-0107

DOT - Region

DOT - Region

11/2005

Date of Last Retiming: 04/01/2016

Date of Last Plan Revision

Revision Comments

Date of Transfer

Date of Retirement

Service Provider: Wisconsin Dells Water & Light

Serv Provider Meter Num: 374

Serv Provider Acct Numb: 3-17538-00

Prim Inst ID Shrd Srv

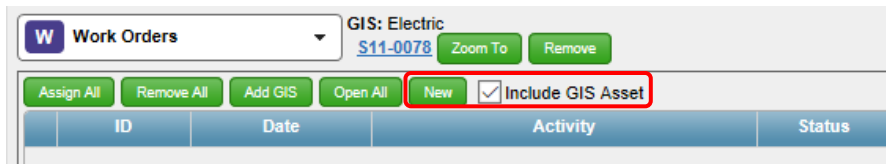
Service Provider Notes

Delete Facility

Close

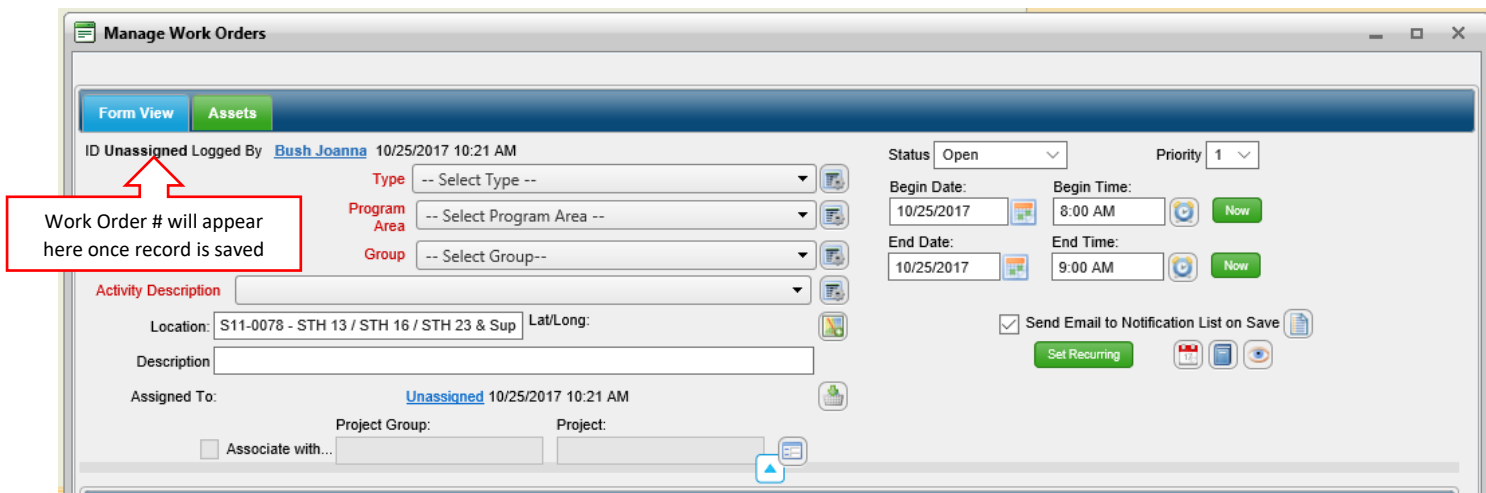
1 of 1

8. Ensure the **Include GIS Asset** box is checked, then click **New**.



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.



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.

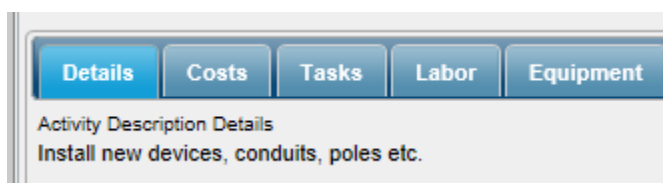
9.3.2 Operational / Project Work: This group type should be selected if the work performed addresses operational or planned equipment modifications.

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.



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

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.

The dialog box contains the following fields and options:

- Select From**: A dropdown menu with "All Layers" selected. This field is highlighted with a red box.
- Set Point**: A checked checkbox.
- Assign Location**: A checked checkbox.
- Attach Assets**: A checked checkbox.
- Text: "0 Asset(s) found"
- Buttons: "Done" and "Cancel"


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**.

The dialog box is updated with the following information:

- Select From**: A dropdown menu with "All Layers" selected.
- Set Point**: A checked checkbox. Text: "Lat/Lon: 45.532321, -92.021577"
- Assign Location**: A checked checkbox. Text: "F03-0208 - STH 48 & USH 63"
- Attach Assets**: A checked checkbox. Text: "1 Asset(s) found: F03-0208 - STH 48 & USH 63"
- Buttons: "Done" and "Cancel"

The "Set Point", "Assign Location", and "Attach Assets" sections are highlighted with a red box.

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.

The "Work Order Assignment" dialog box contains the following sections and options:


- Individual Assignment**:
 - Send Email to Assignee
 - Filter by Role**: A dropdown menu with "-- ALL --" selected.
 - Select Who to Assign**: A dropdown menu. This field is highlighted with a red box.
 - Button: "Assign Individual"
- Role Assignment**:
 - A dropdown menu.
 - Button: "Assign Role"
- Button: "Cancel"

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:*

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.

	Show Fields	Asset ID	Layer or Facility	GIS Location	Name
1	<input checked="" type="checkbox"/>	186669	S11-0078		S11-0078
2	<input checked="" type="checkbox"/>	S11-0078	Electric	S11-0078 - STH 13 / STH 16 / STH 23 & Super	S11-0078 - STH 13 / STH 16 / STH 23 & Super



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**.

The screenshot shows the 'Inventory' tab interface. The 'Estimated' sub-tab is selected. The 'Entry Mode' is set to 'Item'. The 'Date' is 10/25/2017. The 'Charge Rate' is set to a dropdown menu. There are 'Add' and 'Clear' buttons.

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**.

The screenshot shows the 'Inventory Item Filter' dialog box. The 'Warehouse' dropdown is open, showing a list of warehouses including BTO Madison, BTO Milwaukee Annex, BTO STOC, BTO TAPCO, Central Sign Shop, NC Rhinelander, NC Wisconsin Rapids, NE Green Bay, NW Eau Claire, SE West Allis, and SW La Crosse.



- 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.

Name	Number	Warehouse	Location	On Hand
SIGNAL HEAD CLOSURE, COMPLETE, METALLIC, TUCKER	1062	SW La Crosse		0.00
SIGNAL HEAD, 8 in EAGLE, SINGLE YELLOW	1063	SW La Crosse		0.00
SIGNAL HEAD, 12 in 5 SEC., W/LEFT TURN ARROWS/AUTOMATIC /WITH BB	1064	SW La Crosse		4.00
SIGNAL HEAD, 12 in AUTOMATIC SIGNAL, 3 SEC. /WITH BB	1065	SW La Crosse		0.00
SIGNAL HEAD, 12 in	1066	SW La Crosse		0.00

- 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.

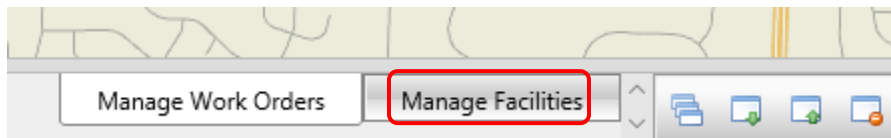
22. Edit and/or Delete estimated inventory items as needed.

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.

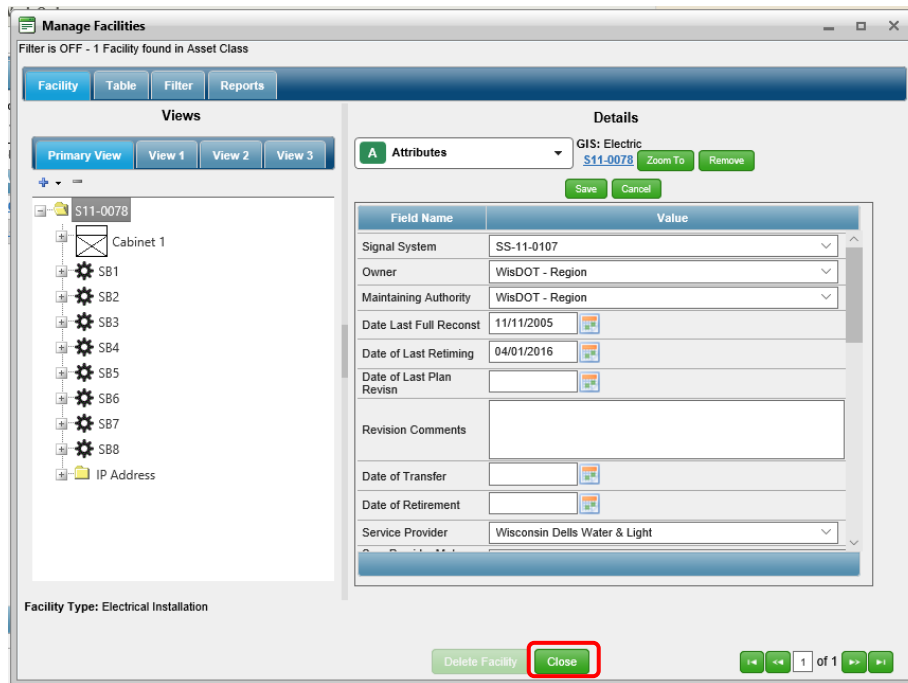
Estimated Actual Enter Inventory By: Name Number
Entry Mode: Item Kit Ad Hoc Maintenance List Date* 03/10/2018 Charge Rate Add
Quantity* Notes Clear
Warehouse:
+ Add Multiple \$ Update Rates Copy To Actual

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).

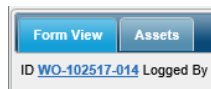


26. Make changes to your facilities record as needed. For assistance with these changes, see [How to Modify Asset Data](#). When complete, click **Save** at the top of the dialog box, then click on the tab at the bottom right of the screen to return to the **Manage Work Orders** dialog box (without closing 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.

