

# TOAMS: Signing Training and User's Manual

Anything Highlighted in Blue would be BTO or Region Data Editor task.



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# **Table of Contents**

TOAMS Signs: Logging In, Setting Preferences, Getting Help	3
Logging in TOAMS	3
Getting Help	4
Setting Preferences	4
Searching, Filtering, and Viewing Assets	5
Map Feature	5
Selecting Assets from the Map	7
Data Viewer- Search Pages	8
Data Viewer- Search Filters	9
Filtering Further	10
Saving and Running a Search Filter	11
Reporting-General	12
Viewing Attribute Data for an Asset	13
Viewing Current Attribute Data	13
Viewing Work Orders from Cartegraph	14
Attaching a Document	15
Updating Signs	16
Updating Sign Attributes	16
Physically Moving Signs in VUEWorks	17
Creating Reports	19
Generate a Standard Report (Traditional)	19
Generate a Standard Report (Dynamic)	23
Training Notes	30





## **TOAMS Signs: Logging In, Setting Preferences, Getting Help**

### **Logging in TOAMS**

1. Open a Microsoft Edge and enter in the following URL

WAMS ID: <u>https://on.wisconsin.gov/WAMS/home</u> Test/Training: <u>https://toams-t.wi.gov/VUEWorkstest</u>

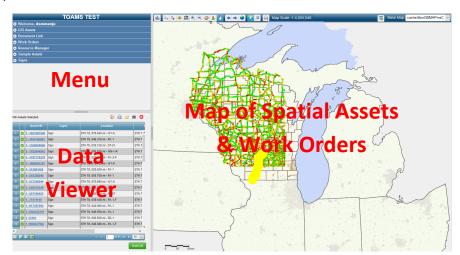
Production: <u>https://toams.wi.gov/VUEWorks</u>



2. Log into TOAMS Test system with your WAMS Test ID and password. Should you have difficulty logging in, please contact Mary Elizabeth Kunkel.

Login	
Local Login	
Username	
Usemame	
Password	
Password	
Remember My Login	

 Navigate the system. The <u>Menu</u> accesses projects, work orders and contains signing assets. The <u>Map</u> accesses the spatial assets and displays signs and work orders spatially. The <u>Data Viewer</u> searches spatial assets as well as displays asset information.



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### **Getting Help**

Contact Mary Elizabeth with log in issues.

Contact BTO (Jeannie Silver, Matt Rauch, or Jay Hille) with any other issues.

### **Setting Preferences**

Everyone can set individual preferences for the VUEWorks system. These preferences include default settings for work orders, search pages and many other considerations.

- 1. Navigate using the menu. Click on the **Welcome** option in the menu to expand. Then select the **Set Preferences** option.
- The Set Preference window will open and the default VUEWorks Feature is General. On the General feature widow, you will see many options.





- 3. Do not use the Password reset option since you are using another system to manage the password.
- 4. The Embedded Window Mode is used to allow the sub-windows in VUEWorks to move outside of the application. This is best used when working with two monitors since you can place sub windows on a different monitor.

Note: Currently Embedded Windows On works better.

- 5. In the Search Page area, pull down on the list and select **Signs**.
- Default View should be set to Map. Note: If you select Dashboard for Default View, the Dashboard will display when you log in. To go to the main program with the Map, click on the VUEWorks toggle button in the upper left area. Do not click on the browser back button. It will log you out of VUEWorks.
- 7. Click on the **Save** button.

Change the password you use to leg in to VUEWorks
Embedded Windows Mode
Set whether VUEWorks uses embedded windows or not Embedded Windows On  Embedded Windows Off
Search Page
Set default Search Page
Signs 🗸
Map Settings
Display WO/SR map point tooltips on:
Click O Hover
Default View
Which View should be shown by default?
O Dashboard   Map





## Searching, Filtering, and Viewing Assets

VUEWorks offers many ways to select assets. The most common ways are using:

- o The Map Feature
- Data Viewer Search Pages
- o Data Viewer Search Filters

We will walk you through these methods. Once assets have been selected, many other actions can be performed. Those options will be described later in this document.

### Map Feature

#### Get to know the Toolbar

The toolbar along the top of the map lets you perform a variety of tasks associated with selection of assets and navigation of the map. Below is a quick description of each of these tools and their function.

	💼 ⊳ 🔖 🗰 🙈 🔍 🐲 🕵 🥠 🦛 🌩 🐼 💦 🔎 🖾 Map Scale: 1:506,880 🤤 Ba	Base Map: cache/dbmGBMAPmsC
- 1		

Show Dashboard: Dash board view

**Map tip:** Display asset information by clicking the asset on the map.

**Select assets:** Select one or more assets by clicking the location on the map or drawing a box on the map. The assets are then added, replaced, or removed in the Data Viewer selection set.

Select assets using buffer: <sup>1</sup> Select all assets within a specific distance of an asset you select on the map.

Measure: 🕮 Find linear and area measurements.

**Zoom in/out:** Soom in or out of the map area by clicking on the map.

**Edit map:** Add or edit features on the map, along with their attributes.

**Street view:** Select a point on the map to display it in google street view.

Pan map: Move up, down, left, or right on the map.

**Zoom previous/Next:** Move to the previous zoom level. This is useful when you have been zooming in and out a lot or have accidently zoomed to a place you did not mean to go.

**Zoom to map extents: O**Zoom out of the map to its fullest extent.

**Highlight selected assets:** Display yellow highlights on all selected assets in the Data Viewer selection set.

Zoom to selected asset: Zoom to the location of the currently selected asset in the Data Viewer.

**Print map:** Print the currently displayed map – just the area that is visible on the screen.

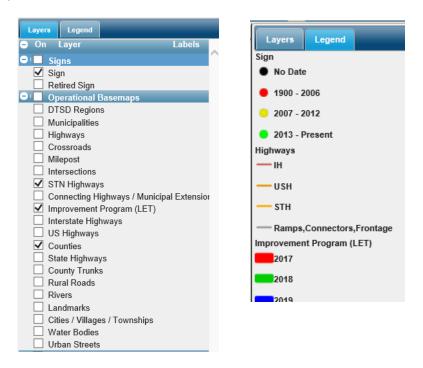
Map scale: Map Scale: 1:506,880 Displays the map.

Note: Assets/Layers and work orders will only display on the map at a set scale.





**Toggle Layer/Legend:** Display or hide the list of map layers and the legend. Note the more operational basemaps you select, the slower the load time will be to select assets.



Base Map: cache/dbmGBMAPmsC

Toggle Basemap selection: Display or hide the list of base maps to choose

from. Select whatever background you would like.







### **Selecting Assets from the Map**

One way to select assets is by using the map area and the tools above for selecting the assets. Use the navigation tools or scroller on your mouse to zoom close to the assets you wish to select and click on the **Select Assets** tool button.

Note: If the map is not where you would like it, use the pan button 👘 to move the map.

The Selection box will display. The default is **All Layers**. Change the **Select From** option using the drop-down arrow. Select **Sign**. The default option is **Add to selection** and will continue to add assets, as selected to the list. The other options are available by clicking on the radio button next to them. **Replace Selection** will clear a current selection with the assets selected. **Remove Selection** will remove only those assets selected from the current selection.

•••	₿ <sub>₽</sub>	Ŗ	#	\$?₽	٩		<i>:</i>	<u>ا</u>	$\langle 0 \rangle$	4	•	٩
Select From												
Sig	Sign  V O Replace selection											
Click on map to select assets ORemove from selection									ion			

Note: If you do not change **the Select From** to Signs it will be very slow. If you accidentally did this click the green in corner of the popup dialog box.

The Selection will be highlighted in yellow and the assets will be displayed in the Data Viewer.

195 A	Assets Selected		[ 🚖 🚔 🛗 😣
	Asset ID	Laye	r Lo
1	8 <u>1163527809</u>	Sign	USH 8, 020.410
2	8 <u>1288802854</u>	Sign	STH 27, 066.22
3	8 <u>140496154</u>	Sign	STH 27, 098.00
4	8 <u>1560507027</u>	Sign	STH 27, 097.97
5	8 <u>1582241537</u>	Sign	STH 27, 065.71
6	8 <u>1713540787</u>	Sign	STH 27, 096.63
7	8 <u>2058053652</u>	Sign	STH 27, 066.22
8	8 <u>2090117377</u>	Sign	STH 27, 096.49

Warning: There will be times in which your search will produce such a large selection, the system will prompt

you to list only.

4398 Assets Found	E
4398 Assets to highlight The maximum number of assets to List and Highlight (1000) has been exceeded.	
Please select an option:	
List Only	

Note: To remove the asset selection from the Data Viewer to do another search, click on the **Red X** <sup>12</sup> in the upper right corner of the Data Viewer.

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#### **Data Viewer-Search Pages**

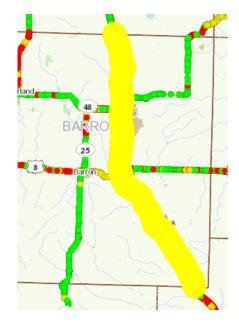
The data viewer will display a default search page. In the set preferences, you can set which search page to default to. Below are the steps to using a search page in the Data Viewer.

1. There are several fields that are searchable for this search page. Enter in a value for the fields. You can enter a value for only one or enter values for several. The asset **must have** all selected values to show up in the

S Signs 🗸 🔂
- Search for Signs by Location -
County Barron
Route Crossroad USH 53 ▼
- Search for Signs by Details -
Sign ID
Material ID
Sheeting Type
Select Locate Clear

2. Once the field or fields have been entered, use the **Locate** button to highlight the assets on the map. Click on the **Select** button to highlight them on the map *and* add them in the Data Viewer as a list of assets.

79 A	sset	s Selected						黹	e
		Asset ID		Layer					ľ
	8	<u>1000041902</u>	Sign			USI	H 53,	074.	64
	0	<u>1000971159</u>	Sign			USI	H 53,	105.	20
	0	<u>1001389072</u>	Sign			USI	H 53,	105.	25
	0	<u>102881632</u>	Sign			USI	H 53,	105.	26
	8	1043639560	Sign			USI	H 53,	128.	96
	8	<u>1059717798</u>	Sign			USI	H 53,	121.	19
	8	1060132147	Sign			USI	H 53,	074.	61
	8	<u>1079285515</u>	Sign			USI	H 53,	129.	00
	8	1089904091	Sign			USI	H 53,	074.	56
	8	<u>1106885400</u>	Sign			USI	H 53,	074.	22
11	8	1116308766	Sign			USI	H 53,	128.	93
<	-		<u>.</u>					~~ •	
2	-	R 🛛		م  1	of 1	6 🕨	> •1	50	
								Multi-	54



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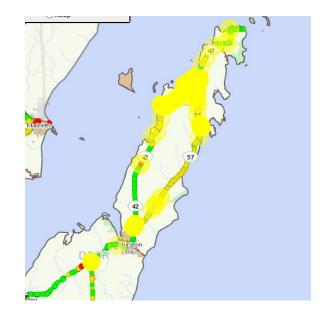


#### **Data Viewer-Search Filters**

- 1. In addition to the search pages, the Data Viewer has the option to manually do a filtered search. To access the search filter, click on the **Binoculars** icon. The search feature will display in the Data viewer. Below is an example for searching for signs in a County and the year the sign was manufactured.
- 2. Set the Filter Options to Add to current selection set.
- 3. In the search criteria area, in the Table drop-down list select **Sign**.
- In the Field drop-down list, select County. Note: It may take a few seconds for the Drop Downs to generate.
- 5. In the Operator drop-down list, select Exactly Matches.
- 6. In the Value field drop-down list, select **Door**.
- 7. The plus sign adds additional search criteria.
- 8. In the Table drop-down list select Sign.
- 9. In the Field drop-down list, select Year Manufactured.
- 10. In the Operator drop-down list, select Less Than.
- 11. In the Value field drop-down list, select 2005.
- 12. When ready, click on the **Search** button. All assets meeting the criteria will be displayed in the data viewer. The assets will also be highlighted in the map area.

				¥ 📖	
Filter: Selec	t a Saved Filter			~	1
	New		Save	Manage	
					1
Filter Options					
-	current selection set				
Add	to current selection set				
	Enter search cri	teria			
Table:	Sign			$\sim$	
Field	County				
Operator:	Exactly Matches			~	
Value:	Door	•			
	And Or 🔾				
Table:	Sign			$\sim$	
Field:	Year Manufactured				
Operator:	Less Than			~	
Value:	2005	•			
Œ					

90 A	sset	s Selected			Þ	۵ 🖻	哉	8
		Asset ID		Layer				Lo
	8	1027359428	Sign			STH 42	2, 004.5	51^
	8	<u>1076172873</u>	Sign			STH 42	2, 040.7	70
	8	<u>1093599487</u>	Sign			STH 42	2, 016.1	13
	8	<u>1098946284</u>	Sign			STH 42	2, 115.7	72
	8	<u>1105815073</u>	Sign			STH 42	2, 114.6	66
	8	<u>1152960825</u>	Sign			STH 42	2, 113.6	62
	8	<u>1154405854</u>	Sign			STH 57	7, 063.7	77
	8	<u>1283631933</u>	Sign			STH 57	7, 082.7	76
	8	<u>132252934</u>	Sign			STH 42	2, 129.4	48
10	8	<u>1465602278</u>	Sign			STH 42	2, 111.6	60
11	8	1593756866	Sign			STH 42	2, 114.4	43
(		100000710	0.			o		5
2	-	R 🛛			of	4 🍉	50	×







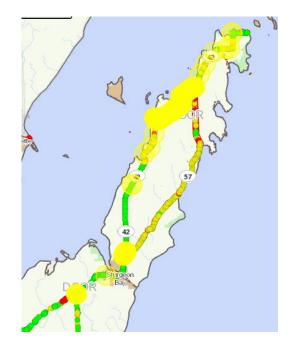
#### **Filtering Further**

VUEWorks allows sub searches. This can be done by clicking on the **Binoculars** icon from the selection list. In the Filter Options select either **Filter current selection set** to narrow down the selection set or **Add to current select set** to add more assets to your selection list. Below will show you how to filter the selection for only Old signs in Door County on STH 42.

- 1. Set the Filter Options Filter current selection set.
- 2. In the search criteria area, in the Table drop-down list select **Sign**.
- 3. In the Field drop-down list, select Route.
- 4. In the Operator drop-down list, select Exactly Matches.
- 5. In the Value field drop-down list, select **STH 42**.
- 6. Click on the **Search** button.

0 Assets Selected	2 🖨 🚽 📾	(
Net	w Save Manage	
- Filter Options		1
<ul> <li>Filter current selection set</li> </ul>		
Add to current selection set		
Enter search o		1
Table. Sign	~	
Field: Route	~	
Operator: Exactly Matches	~	
Value: STH 42	× •	
±		
Search Reset	Clear Back	

140 A	sset	s Selected			D		4	黹	8
		Asset ID		Layer					Lo
	8	<u>1027359428</u>	Sign			ST	H 42,	004.5	51^
	8	<u>1076172873</u>	Sign			ST	H 42,	040.7	70
	8	<u>1093599487</u>	Sign			ST	H 42,	016.1	13
	8	<u>1098946284</u>	Sign			ST	H 42,	115.7	2
	8	<u>1105815073</u>	Sign			ST	H 42,	114.6	66
	8	<u>1152960825</u>	Sign			ST	H 42,	113.6	62
	8	<u>132252934</u>	Sign			ST	H 42,	129.4	84
	8	<u>1465602278</u>	Sign			ST	H 42,	111.6	60
	8	<u>1593756866</u>	Sign			ST	H 42,	114.4	EI
10	8	<u>162629748</u>	Sign			ST	H 42,	113.5	53
11	8	<u>1633583327</u>	Sign			ST	H 42,	090.6	62
<		******	<u>.</u>			~~			5
2	3	P 🛛		· ≪   <mark>1</mark>	of	3	> >	50	~
								Multi-B	Edit



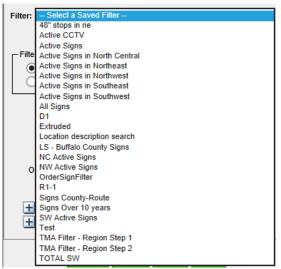




#### Saving and Running a Search Filter

VUEWorks allows the saving of commonly used filter conditions.

- 1. To run an existing search filter, click on the Binoculars.
- 2. Click on the **Filter** drop-down and select the search that you would like to run. The Search criteria fields will auto populate with the saved filter criteria.
- 3. Click on the **Search** button to run the filter. *Note: Any drop down in the existing filters can be changed to meet your needs.*
- 4. To save a search filter, click the red x.
- 5. Click the binoculars again.



- 6. Select the filter you wish to edit or enter in a new one.
- 7. Enter in your search criteria.
- 8. Then click on the **New** button under the Filter list.



9. The Save New Search Filter widow will open.

Save New Search Filter		×
Search Filter Name:	Name the Filter will be saved with	
Filter Description:		
Filter Key Words:	Key words to be associated with this Filter	
	Save Close	

- 10. Enter a Search Filter Name.
- 11. The Filter Description and Filter Key Words can also be filled in before saving. Then click on the Save button.

Note: Saved Filters are not available to you until you close out of the data view and go back in.





### **Reporting-General**

Once assets have been selected, several actions can be done with them. Reporting on these assets is an important part of managing assets. Below is an example of running the **Field Inventory Report**.

- 1. Make sure that you have a selection of assets in the Data Viewer before running reports.
- 2. From the Data Viewer, there is a series of icons across the top. The **Report** icon will open the Report Manager window and allow you to select a report and print using the selected assets.
- There are both Dynamic and Traditional reports to choose from. Traditional reports are canned reports created by DTS and Dynamic reports are reports someone in the Region/BTO created. For the Field Inventory Report, click on the Traditional tab, Signs and the list of reports are displayed.
- 4. Click on the County Field Inventory Report.
- 5. Then click on the **Preview** button. The report will open in a separate browser window. Note: It only displays the first page of the report.



							County Fiel	d Inventory F	Report				
County	Route	Nearest Crossroad	Photolog Marker	Material ID	Sign Width (in)	Sign Height (in)	Year Mfg	Mfg Code	Substrate	Sheeting Type	Order Line 1	Order Line 2	Order Line 3
Brown	IH 43		014.380 mi	M1-94	84	21	2017	"F" (3M Sheeting)	Plywood	Prismatic High Intensity- Type HP	Shadow Ln		
Brown	STH 96		028.730 mi	R2-1 24W x 30H 35	24	30	2000	"F" (3M Sheeting)	Sheet Aluminum	Engineer Grade	35		
Brown	STH 29	CTH Y	001.010 mi	R3-20-L 24W x 36H	24	36	2010	"F" (3M Sheeting)	Sheet Aluminum	Prismatic High Intensity- Type HP	Down Right Arrow		
Brown	STH 172		008.010 mi	R5-1A 36W x 24H	36	24	2016	"A" (Avery Dennison)	Sheet Aluminum	Prismatic High Intensity- Type HP			
Brown	STH 172	Cth YY- Pilgrim Way	000.000 mi	R5-1A 36W x 24H	36	24	2010	"F" (3M Sheeting)	Sheet Aluminum	Prismatic High Intensity- Type HP			
Brown	STH 29	CTH F	006.020 mi	R1-2 36W x 31H	36	31	2014	"F" (3M Sheeting)	Sheet Aluminum	Prismatic High			
				Report ty	/pe: Pdf		$\sim$						
					Print	Close							

6. There are printing and saving options for all reports. The Report Type at the bottom of the screen lets you pick between PDF and Excel with Formatting.

\*Selecting **Excel with formatting** then select **Print**. A second dialog box will pop up. Select **Save as**. Select a location to save the file.

What do you want to do with REP3297576.xls (4.50 KB)? From: toams-t.wi.gov	Save	Save as	Cancel	×
5				

\*Selecting **PDF** then select **Print** will prompt you to a print screen. Select your desired printer.





## Viewing Attribute Data for an Asset

#### **Viewing Current Attribute Data**

VUEWorks provides an area for managing all aspects of an asset. The Data Viewer will allow you to view the selected assets, but it will also provide a location to view attributes (data fields) about each of the assets, work orders, documents, and much more.

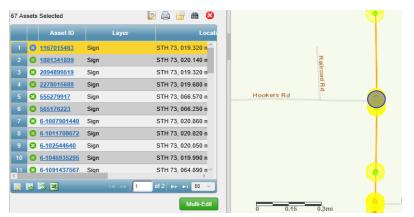
 Use either the Data Viewer or Map to select assets. The Data Viewer will display the selected assets and they will appear highlighted on the map

Note: the following steps only work if it is less than 1000 assets.

2. A brief overview of the signs is shown in the Data Viewer.

		Asset ID	Layer	Location	Label
1	8	1000041902	Sign	USH 53, Southbound - 074.640 mi	W13-1 18W x 18H 30
2	8	<u>1000971159</u>	Sign	USH 53, Northbound - 105.200 mi	R2-1 24W x 30H 55
3	8	<u>1001389072</u>	Sign	USH 53, Northbound - 105.250 mi	R5-1 30W x 30H
4	8	102881632	Sign	USH 53, Northbound - 105.260 mi	R11-54-F 48W x 30H
5	8	1043639560	Sign	USH 53, Northbound - 128.960 mi	R6-1-R 36W x 12H

3. In the Data Viewer, there is a column with **Asset ID** and one for **Layer**. If you click on the **Layer** for an asset in the list, the asset will be highlighted in blue. Clicking on another one will highlight that one in blue.



- 4. Clicking on the Asset ID link (in blue and underlined) will select and display the Attributes for that asset.
- 5. Clicking on the **Show All** button in the lower right corner of the Data Viewer will take you back to the list. The **Green Arrows** will let you move between the assets.

Cian Classification	Marning	
I < 3 0	f 67 🕨 🕨	Show All

Note: The arrows will not go from sign to sign down the road.

6. Assets can be sorted by clicking in the header, a white arrow will light up displaying how they were sorted.

		Asset ID	Location 🔶	Lay	er
28	8	<u>2-57392</u>	STH 120, 009.120 mi - W3-	Sign	^
29	8	<u>1193041115</u>	STH 120, 009.120 mi - W3-	Sign	
30	8	<u>2099837144</u>	STH 120, 009.210 mi - R2-	Sign	

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#### **Viewing Work Orders from Cartegraph**

Viewing Historical work order information from the legacy system, CarteGraph is available and associated with each of the sign assets.

- 1. Select a sign you wish to view Work Orders on.
- 2. Select Historic Work Orders from the drop-down list.
- 3. Work orders in the CarteGraph system are displayed in chronological order. Key information is available. Use the scroll bar to see additional work order records.

H Historic Work O	rders 👻	🚔 🙁
Work Orders		
SIGNEVENTSOID: 20	96471029	^
Last Modified Date	2014-10-08 16:10:06.0000000	
Activity	Correct Data	
MUTCD Code	R1-1	
ORDERLINE1	NULL	
ORDERLINE2	NULL	
ORDERLINE3	NULL	
Who	dotgse	
Why	Update Current Info	
MATERIALID	R1-1 30W x 30H	
Manufactured Date	2004-02-01 00:00:00.0000000	
MUTCD Description	Stop	
REPAIRDATE	NULL	
SIGNEVENTSOID: 20	32445840	
Last Modified Date	2015-01-14 13:11:26.0000000	
Activity	Replace Sign Only	
MUTCD Code	R1-1	
ORDERLINE1	NULL	
ORDERLINE2	NULL	
ORDERLINE3	NULL	





#### **Attaching a Document**

- 1. Navigate to the Sign you would like to add a document to.
- 2. Select Documents from the Dropdown lists.

Sign: 2	259500	
A	Attributes -	
Α	Attributes	Save
D	Documents	
Н	Historic Work Orders	
W	Work Orders	
Р	Projects	
Travel	Direction Fastbound	

3. Click on the Add Document

Add Document

button.

- 4. Click on the **Upload Link** tab at the top of the Create Document Link window.
- 5. Click on the **Browse** link.
- Navigate to the file location and select the Signs Order PDF file.
- 7. In the **Document Type** drop-down list, select Document.
- 8. In the **Upload To Library\*** drop-down list, select the correct BTO SIGNS.
- 9. Click on the **Create Link** button and then click on the **Close** button.
- 10. The document is listed in the Document area for the work order.
- 11. Click on the **Create Link** button to save the work order and generate a work order number.

Create Docur	nent Link				-		×
Upload Link	Link From Library	Assets					
Upload a docum	ent from your local or net	worked drive	to a Library on the VU	EWorks server where it can be easily viewed by other users.			
File Upload							
Files to upload:		Browse.	Clear Files				
			or drop	files here			
`							?
							-
Document Type*				Upload To Library*			_
March Manda			~ 🛠			~	~
Key Words				Comments			
							_
* Required Fields							
			Create Lin	K Close			





## **Updating Signs**

#### **Updating Sign Attributes**

Once the route has been field verified, the Data Editors will update any records that are incorrect. Find the signs you wish to update. Use one of the filtering capabilities shown earlier to find the sign(s) that need(s) to be updated.

1. Enter in all the data that needs to be changed for that asset. Be sure all mandatory fields are filled in. **Do** not make changes in the Gear Tool. It does not always save.

A Attributes		3
	Save	
Sign ID*	1412621308	^
Status	Active	
Region	North Central	
County	Adams	
Route	STH 23 ~	
Travel Direction	Eastbound	
Nearest Crossroad	Cth A	
Position	Left ~	
Material ID	W14-3 48W x 36H V	
MUTCD Sign Code	W14-3 V	
Sign Description	No Passing Zone	

- 2. Select Save.
- **3.** A Change Log Comment box will appear, enter in updated information, projects, or batch order. Then click ok.

Change Log Comment	×
	OK Cancel





#### **Physically Moving Signs in VUEWorks**

If a new sign needs to be added or a sign needs to be moved to the correct location, VUEWorks offers a way to move assets on the desktop application from the map. Below are the instructions to move an asset.

- 1. Click on the **Edit Map** icon at the top of the Map Toolbar.
- 2. The Editor Tool will display at the top of the map area. On the Choose layer to edit drop-down, select **Sign**.



3. Then click on the **Select Feature** button and double click the sign with the mouse pointer. Once the asset is selected it will have a circle around it. You can then take that asset with the pointer and drag it to the new location. This is commonly done when assets are placed on top of one another or are in the incorrect location.



4. Sign Attributes **should not be** entered here.



5. When the asset has been moved, click on the **Done** button. If further edits are needed use the Data Viewer to make changes.

Note: Clicking on the attribute field for Status will allow you to select **Retired**.

Caution!!! Once the Status has been changed to Retired, it is very difficult to change back to Active.

6. This same process could be used to add a new feature or asset. Instead, click on the Add Feature button and select where you want to drop the new sign. Add all the only the status and region. Then fill in the rest of the data in the Data Viewer.

*Note:* **DO NOT** *touch the latitude/longitude fields.* 

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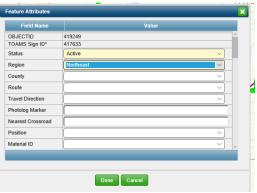
#### **Adding Signs in VUEWorks**

Below are the instructions to add an asset.

- 7. Click on the **Edit Map** icon at the top of the Map Toolbar.
- 8. The Editor Tool will display at the top of the map area. On the Choose layer to edit drop-down, select **Sign**.



- 9. Then click on the Add Feature button and double click where you would like to add a sign.
- 10. The Feature Attributes dialog box will open. Only enter in the Status and Region.



- 11. Select the **Done** button.
- 12. Enter in the rest of the information in the Data Viewer.

Note: Clicking on the attribute field for Status will allow you to select **Retired**.



Note: **DO NOT** touch the latitude/longitude fields.





## **Creating Reports**

## **Generate a Standard Report (Traditional)**

Standard reports consist of basic information in a very basic layout. You can then use the standard report templates to generate reports of your own, as well as make simple changes to their content

1. From the Menu pane, select the **Find/Manage/Report** from either the Work Orders or GIS Assets drop down depending on what you would like to run a report on. If you have assets selected and you wish to run

a report on, you can select the 💹 after a search is completed.

2. When the screen appears, go to the **Report** tab and select **Traditional** or Select **Traditional** if you selected the Report Icon.

25 Assets Selected	🖲 Report Manager - Mozilla Firefox
Asset Data Asset Table Filter Reports Saved Selection Sets	ⓒ
Dynamic Traditional	Dynamic Traditional
Select Layer: Sign ~	Report Manager: Sign 🗸
Tabular Reports	Existing Report Templates

- 3. From the drop-down select Signs.
- Traditional reports are generally tabular in structure and are great for lists, barcode printing, and data summaries. Click on the New button to create a traditional report.
- 5. Enter in a Report Name. For Training purposes, put your FirstName-ReportName for the report name. The report title appears at the top of the report as a header. The report header allows the creation and use of standard letterhead with special fonts and pictures or agency logos.

C	Traditional R	eport Designer
Γ	Report Definiti	on
	*Report name:	
	Report title:	
	Report Header:	
Ľ	*Style	

6. **Report Header:** This is a "running header" that appears above the title, such as your company name and location. It can be repeated on every page. To define a

header, click the **Manage Headers** icon 🔀 . The Report Header Editor dialog appears.

- Provide a name for the heading.
- Specify the height of the header area (you also specify the units of measurement for the height).
   Note: The height needs to be great enough to accommodate the header text and images, if any.
- Specify the font type, size, and style.
- Images can also be used use in the header.
- Click Save when you are done to close the dialog.

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🕘 Report	Header Editor - M	ozilla Firef	ox		_	
🛈 🔒 htt	tps://toams-t. <b>wi</b>	.gov/VUE	WorksTe	est/BaseC	S/ReportH	eaderEdi
*Name:	Wisconsin DOT					
*Heading:	Signing Assets					
Units:	English 💿			Metric (	)	
Font Se	ttings ———					
*Height:	*Font:				*Size:	Bold:
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Left			~	1		
Image:				j Uplo	ad a new Ima	ige:
Right Image:	Preview	Cause		Delete	Upload Close	
	Preview	Save	New	Delete	Close	



7. Style (required): Indicates the type of report you want to generate:

\*Style O Form O Summary 
Tabular O Advanced Tabular O Form Merge

- Form: Report looks like a form.
- Tabular: Report is a table of data with one field per column and one record per row.
- Advanced Tabular. Report is a table of data with multiple fields per column and multiple records per row.

Margin (inches)

Left

Top:

OMetric

0.75

0.75

O Tabloid (11 x 17 in.)

Right:

Bottom

0.75

0.75

- Form Merge. Report is generated by merging in data from VUEWorks selection sets.
- 8. Leave **Units** as English.
- Select Paper Size as either 8.5x11 or 11x17.
- 10. Leave Margins as 0.75.
- 11. Change the **Orientation**

from Portrait to Landscape to provide more space for columns.

Units English

Page Size • Letter (8.5 x 11 in.)

Orientation

Portrait

🗍 Landscape

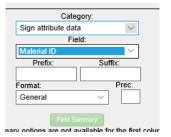
- 12. Report Title Style: This is the font used for the title.
- 13. Column Header Style: This is the font used in the Header
- 14. Column Detail Style: This is the font used in rows and columns of the report

Report Title Style	Column Header Style	Column Detail Style
Font: Times New Roman	Font: Times New Roman	Font:       Times New Roman         Size:       12         Bold:       Italic:         Underline:          Show detail          Show separator          Row Spacing:       0         In.          Break after each row

- 15. Press Next to view the next page where you specify what should be included in the report:
- 16. The Traditional Report Designer displays. To add a column, click on the Add Column button at the top.



17. In the mid-section, the selection list displays. Select the **Category** and **Field** for the column. Formatting options are available.



18. Continue to add columns and fields to the report (some field types allow for summary options).

#### 19. Click Field Summary.

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- 20. Fill in the boxes as appropriate.
- 21. When you have selected all the fields, click on the **Save** button. Save anytime you would like to preview the report.
- 22. The displayed columns can be formatted in terms of size/length, column title, and alignment. Select the column and then make the changes. Preview the results at any time. Saving is required before previewing.



23. Click on the **Next** button to continue with report Sorting, Grouping, and Footer creation.

Sort:	Ascending Oescending	Provide 0.00	in. between groups Page Break after e	ach Group:
Category:	Select Category V	Header	Font: Times New Roman	Grouping
Field:		Footer Label     Footer Value	Size: 12 V	Header
Label:		O Pooler value	Bold: Italic: Underline:	Footer (Summary Info.)
L				

- 24. Enter in any sorting criteria, indicate ascending or descending, and add any other formatting desired. Click on the **Next** button to display the Access screen.
- 25. The Set Report Access works the same as the Filter Save feature. Select the Users or Roles and click on the right arrow to give access. Select on the right side any User or Roles and click on the left arrow to remove access.



26. Save the report and preview and/or print the report. All reports display in a window prior to being printed and most pop up a separate window. If it does not work, check for pop up blockers, allow pop ups, and then run the report again.





- 27. If you want to make some changes to the report before you print it, select the **Edit** Tab. The Traditional Report Designer screen appears.
- 28. Enter any changes you have and hit save.
- 29. To copy an existing traditional report template to serve as the basis for a new one, select the report and click **Copy**.
  - a. When the Traditional Report Designer screen appears, change the **Report name** and **Report title** and then follow the same process and make any other desired changes.
  - b. Once you're finished, click **Save** and the name of the new report will appear under the **Existing Report Templates** pane.





## **Generate a Standard Report (Dynamic)**

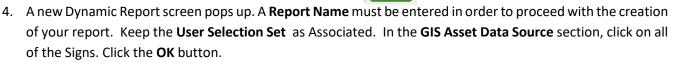
1. From the Menu pane, select the **Find/Manage/Report** from either the Work Orders or GIS Assets drop down depending on what you would like to run a report on. If you have assets you wish to run a report on

are in the Data Viewer you can select the 🗾

2. When the screen appears, go to the **Report** tab and select **Dynamic** or Select **Dynamic** if you selected the Report Icon.

25 Assets Selected	
Asset Data Asset Table Filter Reports Saved Selection Sets	
Dynamic Traditional	Dynamic Traditional
Select Layer: Sign V	
Existing Report Templates	
Tabular Reports	

3. Click on the **New** button to create a Dynamic report.



New

Report Category	All	
Report Name*	Jeannie WO Test	
Jser Selection Set	Associated      Not Assocated	
-GIS Asset Data Sou	rces	
Layer		
Sign	~	
Required		
	OK Cancel	

5. If the screen below pops up follow steps 6-9. If not skip to step 10.



6. Click on the 3 dots in the upper right-hand corner of the browser.

• • •

- 7. Then click settings.
- 8. View Advanced Settings

Advanced settings

View advanced settings

9. Change it to use Adobe Flash Player.

Use Adobe Flash Player



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10. The Wizard will display after loading. **Select Using Report Wizard** and **Standard Report** are selected. Click the **Ok** button.

	N	ew Report		×
Create a New Repo	rt			
Blank Report	Using Report Wizard			
Wizards	Load	ding Report		
Standard Report	Master-Detail Repor	t Label Report		
			ОК	Cancel

11. The Data Source option will display. Select GISAttributesand click the **Next** button.

Data Source Select one Data Source fro	om available.
Data Source	🖃 盲 GISAttributes
Select Columns	GISAttributes
Columns Order	
Sort	

12. The Select Columns options will display. Check each field you would like included in your report. Then click on the **Next** button.

Select columns from w	hich the information will be displayed.		
Data Source	GISAttributes		-
Select Columns	123 OBJECTID		
Columns Order	V DE SIGN_ID_PK		
	I III SIGN_STATUS		
Sort	IDE SIGN_RGN		
filters	Im SIGN_CNTY		
Groups	V DE SIGN_RTE		
Totals	✓ IM SIGN_TRVL_DRCTN		
	V DE SIGN_STE_ID		
Themes	SIGN_PSTN		
ayout	V III SIGN_MTRL_ID		
	BIGN_CD		
	Be SIGN_DESC		
	BIGN_CLASS		
	SIGN_WDTH		
	SIGN_HGTH		•
		Mark All	Reset





13. The Column Order section will display along with all the fields you selected previously. Use the Up and Down arrows on the right side of the window to arrange the fields in the order that you would like. This step here will save you a lot of time. They can be arranged once the report is rendered but it takes more time and effort. Click on the button.

Arrange columns in th	e necessary order.	
Data Source	it GISAttributes.SIGN_ID_PK	4
Select Columns	IN GISAttributes.SIGN_CNTY	
Columns Order	IN GISAttributes.SIGN_RTE	
Sort	IN GISAttributes.SIGN_TRVL_DRCTN	
Filters	IN GISAttributes.SIGN_STE_ID	
	INTERPORT BALL BALL BALL BALL BALL BALL BALL BAL	
Groups	abe GISAttributes.SIGN_MTRL_ID	
Totals	INTERPORT NUMBER OF THE INTERPORT OF THE	
Themes	ING GISAttributes.SIGN HGTH	

14. The next part of the wizard, is the **Sort** section. If you would like the data sorted in a particular order, set the sort here. Click on the **Add Sort** button. In the Field Box [No Sorting] dropdown, click the arrow to the right. Then double click on the field. Note: You may need to open a table to see the fields. You can select Ascending or Descending. Then click the **Next** button.

Sort Set the sorting of data. You ca	n sort immediately on m	ultiple columns.				
Data Source	⁺àl Add Sort 🗙 Rem	nove Sort 🔺 🔻				
Select Columns	Orthu					
Columns Order	Sort by	SIGN_TRVL_DRCTN		Ascending		*
Sort	There bu	CICN DTC				
Filters	Then by	SIGN_RTE	-	Ascending		*
Groups	Then by	CTCN DL MDKD		• P		
Totals	Then by	SIGN_PL_MRKR	-	Ascending		*
Themes						
Layout						
		<	Back	Next >	Finish	Cancel





15. The **Filter** Button is the section that would allow you to bypass doing a filter query before running the report. This is optional. To add a filter, click on the **Add Filter** button. The **Dynamic Report** is a little different in the setup. There is an option to do Value or Expression. If you wanted this report to only use one set filter, use the Value option for **Field Is**. Data Type indicates what type of field it is. The Column field is where you select the table and field to condition against. You can then set the condition and the literal value. Click on **Next** to move to the next section.

	×
t Add Filter  ➤ Remove Filter @ And	
Field Is Data Type Column	
	· ·
equal to *	
< Back Next > Finish	Cancel
	Or

16. If you would like to create a grouped report, the **Groups** section will allow you to identify which field or fields to create a group band. In our example, we will click on the **GISAttributes.SIGN\_TRVL\_DRCTN**. Notice that it moved it to the top and selected it. You can have more than one grouping. The hierarchy does matter in the way the report will be formatted. The top one will be the outer or higher-level grouping.

Groups Select columns on which nece	ssary to group.
Data Source	Im GISAttributes.SIGN_TRVL_DRCTN
Select Columns	Image GISAttributes.SIGN_SHTG_TYP
Columns Order	Image GISAttributes.SIGN_RTE
Sort	Im GISAttributes.SIGN_PL_MRKR
	· · · · · · · · · · · · · · · · · · ·

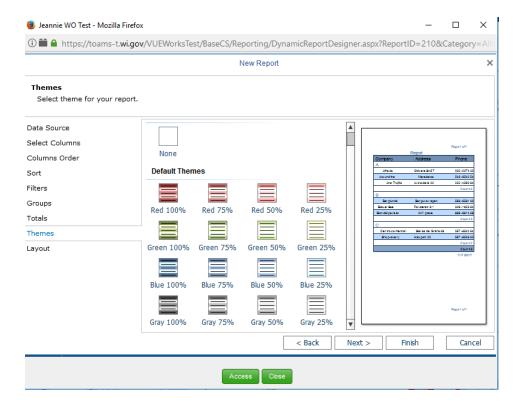




17. The **Totals** section is the next part of the wizard. In this section, identify any field you would like summarized. You can select several summary options. The pull-down list will display the options relative to the field type. You can have multiple summary fields. Once completed, click on the **Next** button.

<b>Totals</b> Add summary informa	ation to your report.		
Data Source	Column	Function	
Select Columns	SIGN_TRVL_DRCTN	[None]	
Columns Order	SIGN_SHTG_TYP	[None]	
Sort	SIGN_RTE	[None]	
Filters	SIGN_PL_MRKR	[None]	
	SIGN_MTRL_ID	[None]	
Groups	SIGN_ID_PK	[None]	
Totals	SIGN_RGN	[None]	
Themes	SIGN_CNTY	[None]	
Layout	SIGN_STE_ID	[None]	
	SIGN_PSTN	[None]	
	SIGN_WDTH	[None]	
	SIGN_HGTH	[None]	
	NON OPPTOT	<b>751 1</b>	

18. The **Theme** section gives you an option to select a pre-defined template for background color and look as well as data row distinction. Select one of the themes or none and click on the **Next** button.







19. The final section is the Layout. In this area, you can change the orientation of the report and whether you use the regular data layout or a table structure look and feel. The other items should be unchanged. Use the defaults. Click on the Finish button and the system will generate the report and display in Design mode.

Layout Specify layout of report	t.	
Data Source	Orientation	Unit
Select Columns	O Portrait	Inches
Columns Order	<ul> <li>Landscape</li> </ul>	Hundredths of Inch
Sort		Centimeters
Filters	Language	Millimeters
Groups	◯ VB.Net	
Totals		
Themes	Component	
	Data	
Layout	Table	

- 20. The Report will view in Design Mode. Titles and widths can be changed here.
- 21. Click on what value you would like to change.

Save	rt Issues		Paste	X Cut Copy X Delet	y	be Devi	A p	* 10 A A	2		= =		0				General	8	Conditio			Non Rlue 7 Blue 759	75% % Rep( -		
	Report	Undo	Cli	ipboard			Font		Fa	Ali	gnment			Borders	r	a Te	xt Format	t Gi			Style			Di la	
	Page1	à Preview		2		3		4			5		6					8		9		Propertie	es Dicti	onary Report T	ree
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											JISA	unou	les									Paper S Page W		11.69	
																						Page He		8.27	
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m	Grou	pFooterBand	J						_								_					Column		0	
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-	Foot	erband																							
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4																					F				
Inche	s 🔺 🕨 Repe	ort Checker																					🖻 🔜	100%	





around.

22. Go to the box on the right. Click in the field you which to change. Widths can also be changed on the report. You can also highlight more than one field and change the width. You can also more column

Ξ	1. Text		
	Text	fx Sheeting Type	
Ð	Text Brush	Solid	
Ð	Font	Arial; 8pt; style=Bold	
	Horizontal Alignment	Left	
	Vertical Alignment	Center	
	Text Format	General	_
Ξ	2. Text Additional		
	Allow HTML Tags	False	
	Angle	0	
	Editable	False	
	Hide Zeros	False	
	Lines of Underline	None	
	Margins	0; 0; 0; 0	
	Max Number of Lines	0	
	Only Text	False	
	Process at	None	
	Processing Duplicates	None	
	Render to		
	Shrink Foot to Eit	Falsa	_

23. Click on the **Save Report** button and then you can preview by clicking on the Preview tab close and run the report.

Q Preview or

									Signs							
County	Route	Travel Direction	Photolog	Material ID	Width	Height	Site ID	Position	Sheeting Type	Manfacture Code	Year Manufactured	Order Line 1	Order Line 2	Order Line 3	Support 1	Support 2
EB																
Adams	STH 23	₿	002.550 mi	W14-3 48Wx 36H	48	36	5th Dr	Lef t	Flourescent- Type F	"A" (Avery Dennison)	2016				Posts Wood 4x6-Inch x 14-FT Posts	
Adams	STH 23	₿	003.440 mi	J1-1 24W x 39H	24	39	CTH G	Right	Prismatic High Intensity-Type HP	"A" (Avery Dennison)	2014	JCT	G		Posts Wood 4x4-Inch x 14-FT	
Adams	STH 23	FR	003.710 mi	J4-1 24W x	24	36	стн в	Right	Prismatic High Intensity- Type	"A" (Aven/ Dennison)	2014	FAST	23		Posts Wood	

24. Additional Note: The Access button at the bottom will allow you to set permissions to an individual or role. It works like the Traditional report access option. Click on the Users or Roles on the left and click on the Right Arrow button to move them to the right and give them access.

Set Report Access			
Users		Users With Access	
Allen Ibaugh Anny Eanard Angela Machado Anel Rios Bart Williamaon Bob Johnson Bob Johnson Bob Johnson Bob Johnson Bishar Sovik Charles Brown Charles Brown		Administrator Andrew Clem Iisa schoenfelder Judy Hickerson	*
Dan Bellissemo	+		~
Roles Contractor Junicr Administrator Public Works Stormwater Storets Users VW Internal	*	Roles With Access Administrators	*
	-		v
		Save	Close





## **Training Notes**

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Page 30 of 30