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

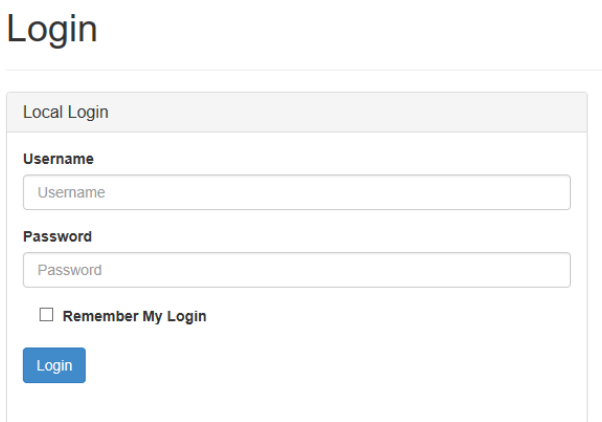
References:
[How to Modify Electrical Asset Data]

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

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

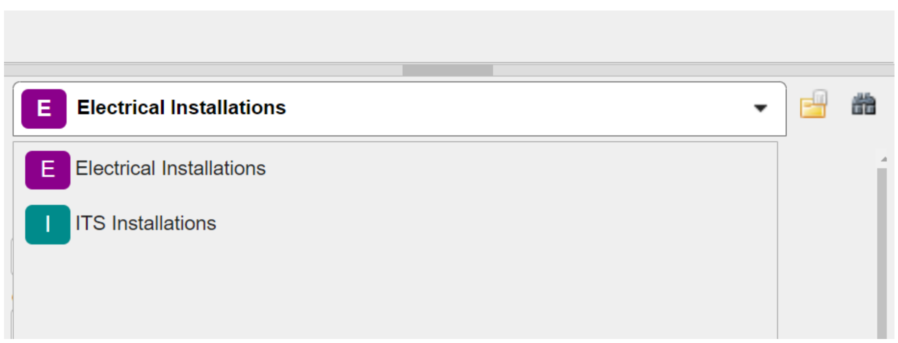
A. Navigate to a New Work Order

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

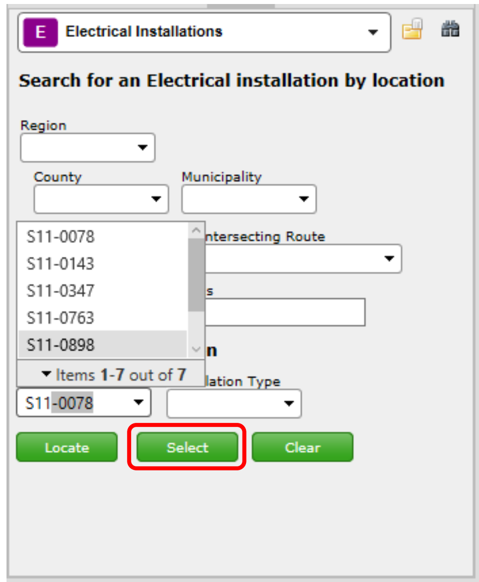


3. Select installation that the work order will be created for:

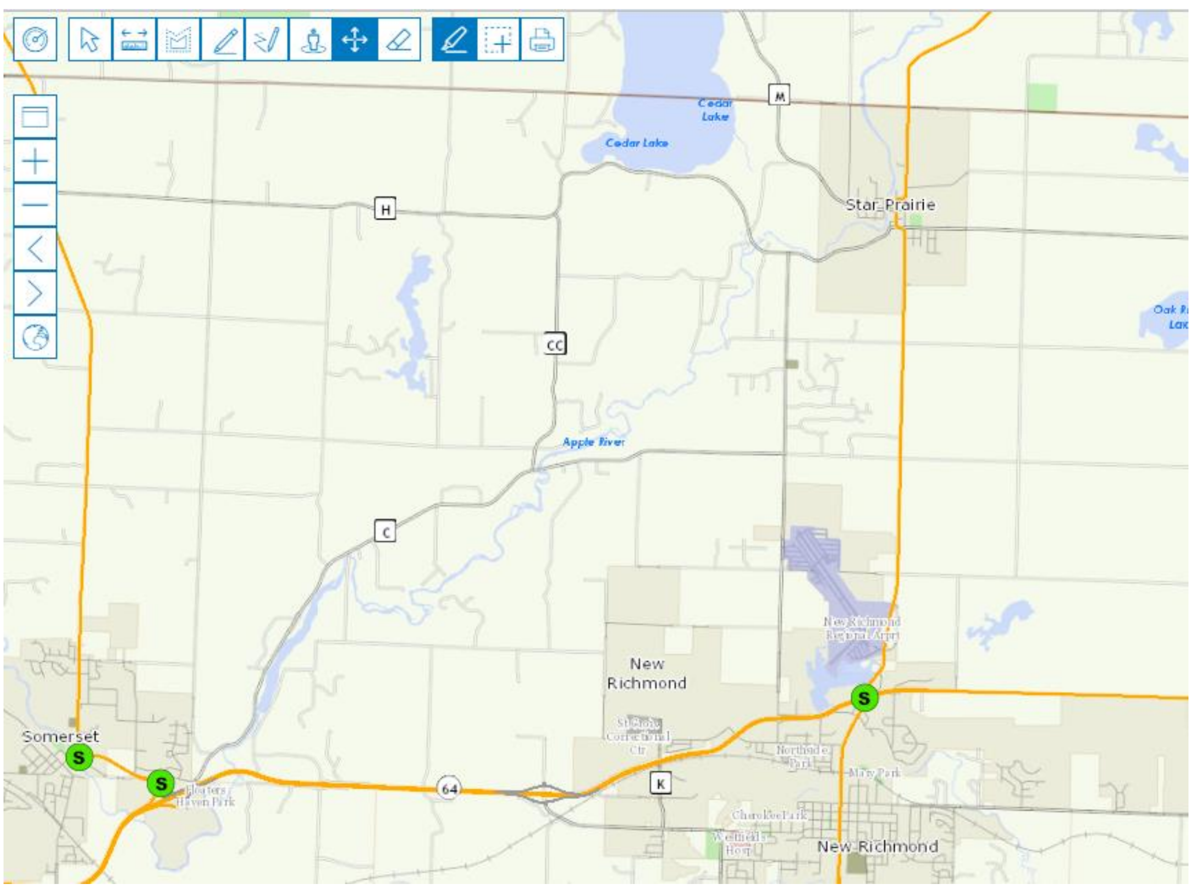
   Option 1: Navigate to associated installation using the data viewer (lower left) portion of the screen. First, select **Electrical Installations** from the drop-down, UNLESS you are creating a work order for a ramp gate. Select **ITS Installation** if the asset is a ramp gate.



   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**. When you click **Select**, the installation will also be circled in yellow and centered on the map.

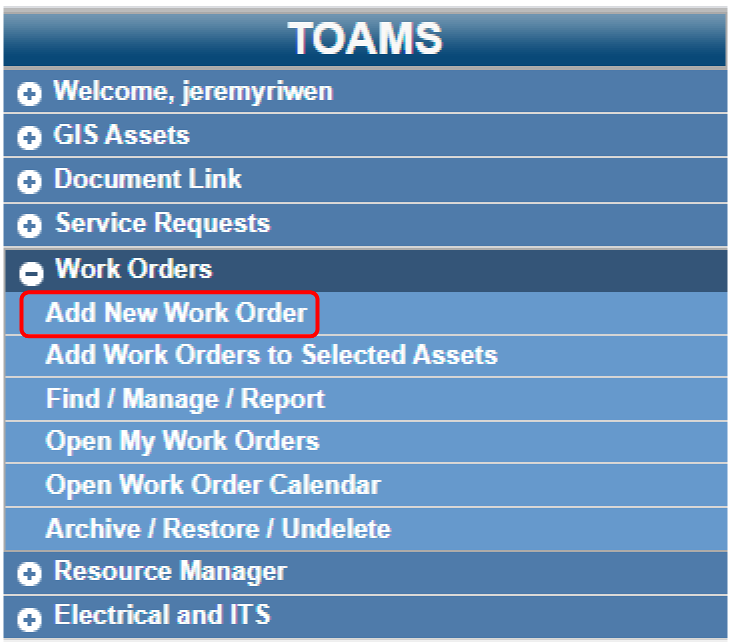


Option 2: If you know the location of the installation but do not know the number, you can pan to the location of the installation on the map

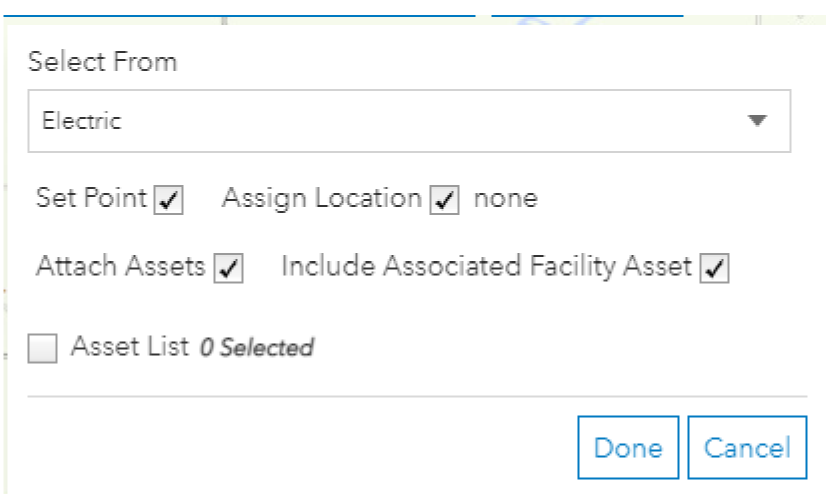


4. On the menu, Click on **Work Orders** to expand the menu.

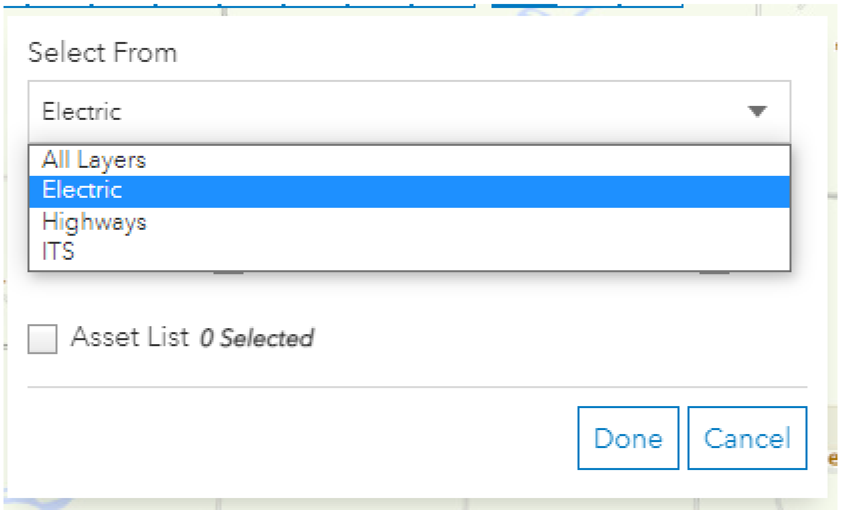
5. Click on Add **New Work Order**



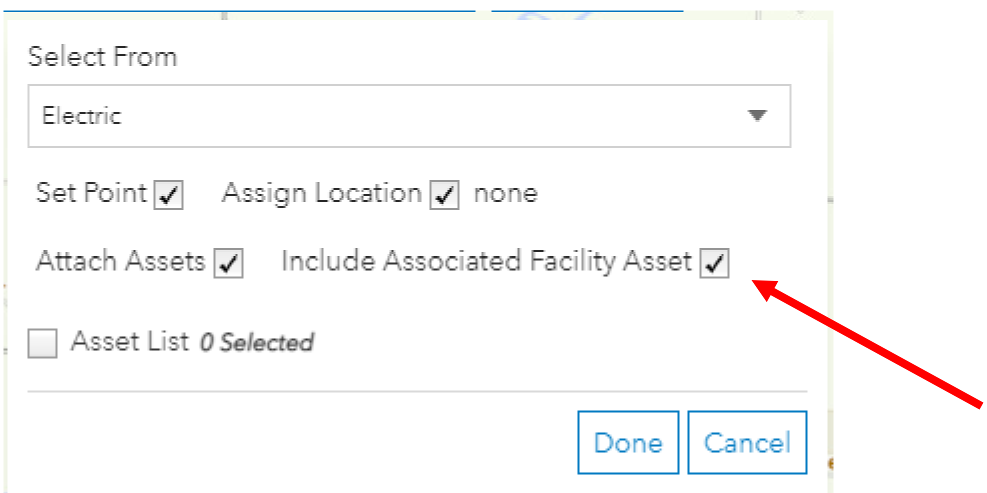
6. A window will appear to select the asset that the work order will associated with.



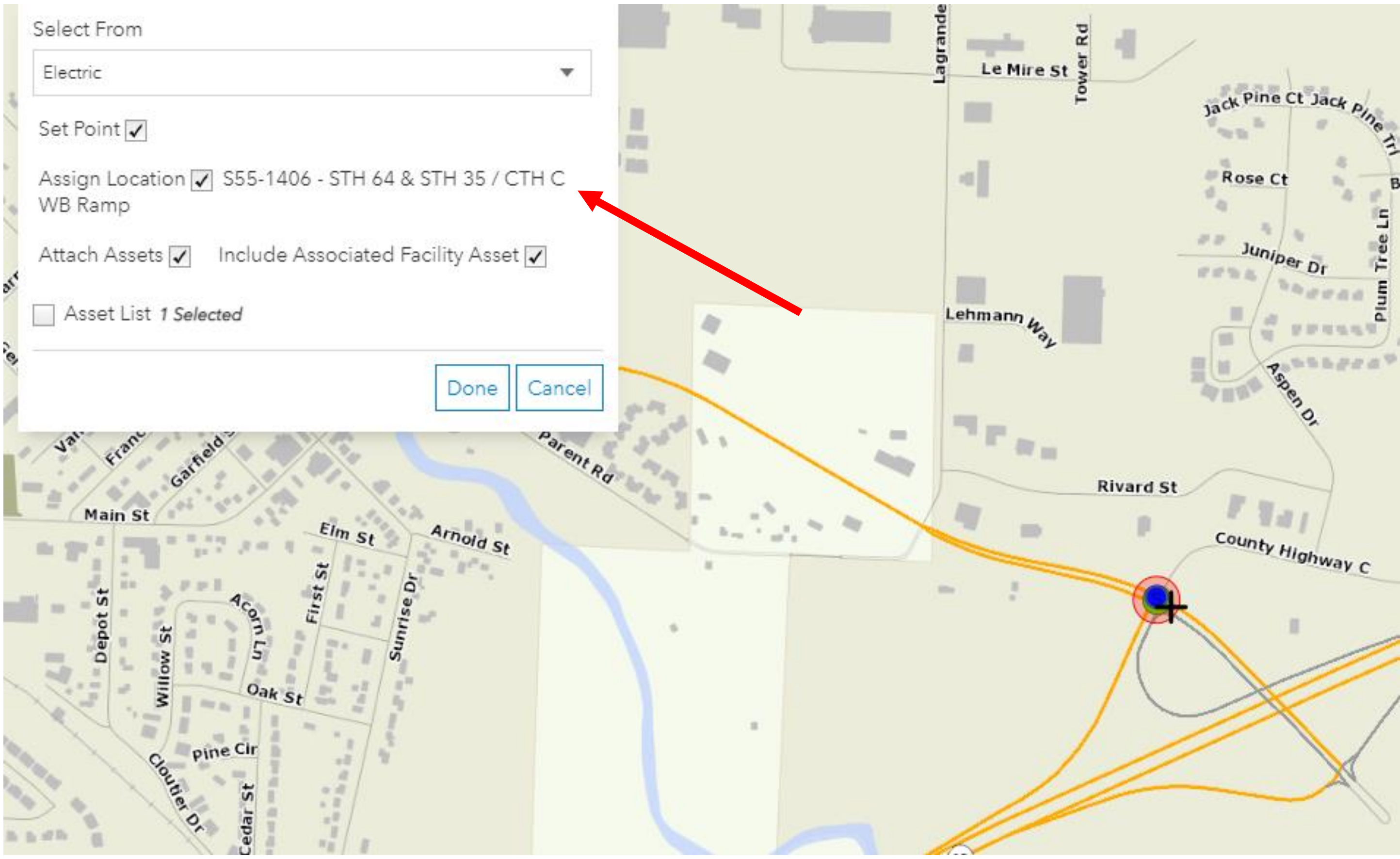
7. On the **Select From** pulldown, select the asset layer you would like the work order created for. Most of the time, the asset to be selected will be an Electric layer.



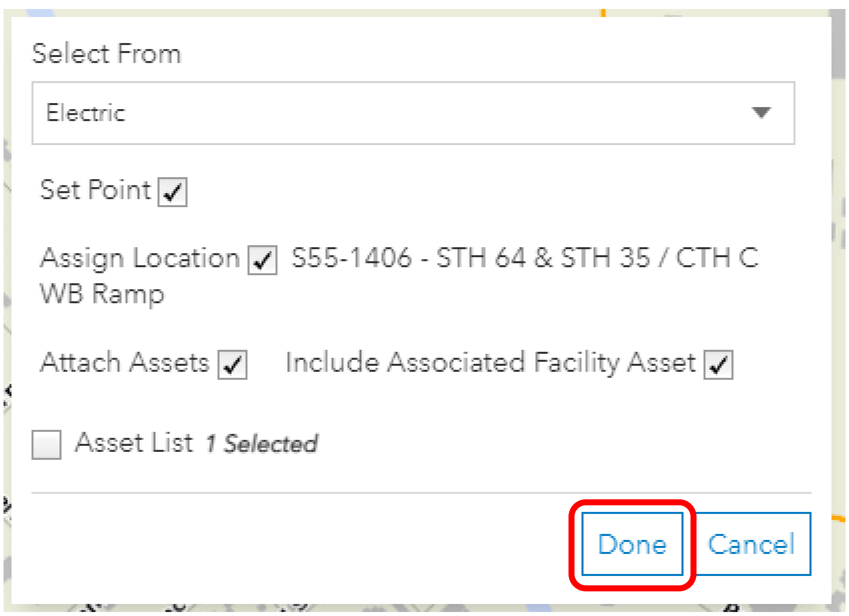
8. Make sure **Include Associated Facility Asset** is checked



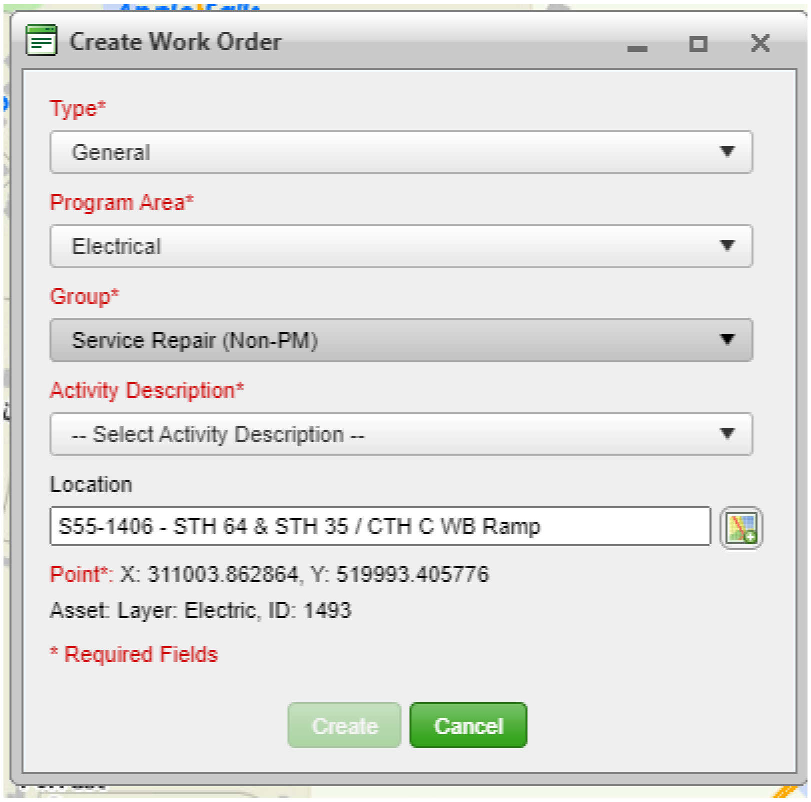
9. On the map, click on the appropriate installation / facility asset. Confirm that the correct installation / facility asset was selected.



10. Click **Done**



11. After clicking **Done**, another window will appear. Use the pulldown menus to select the work order type, program area, group and activity description.



11.1 Type: This should always be set to General

11.2 Program Area: Select Electrical

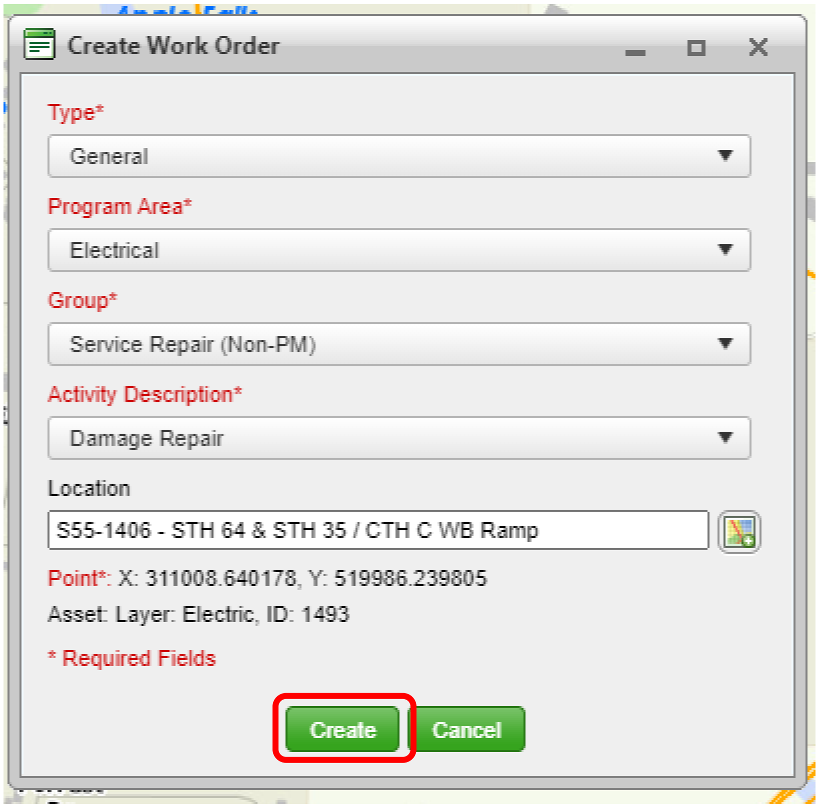
11.3 Group: Four options are available and can be categorized as follows:

- 11.3.1 Materials Management: Activities associated with materials / inventory management
- 11.3.2 Operational / Project Work: This group type should be selected if the work performed addresses operational or planned equipment modifications.
- 11.3.3 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.
- 11.3.4 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

11.4 Activity Description: The choices in this drop-down list are dynamic based upon the Group that is selected.

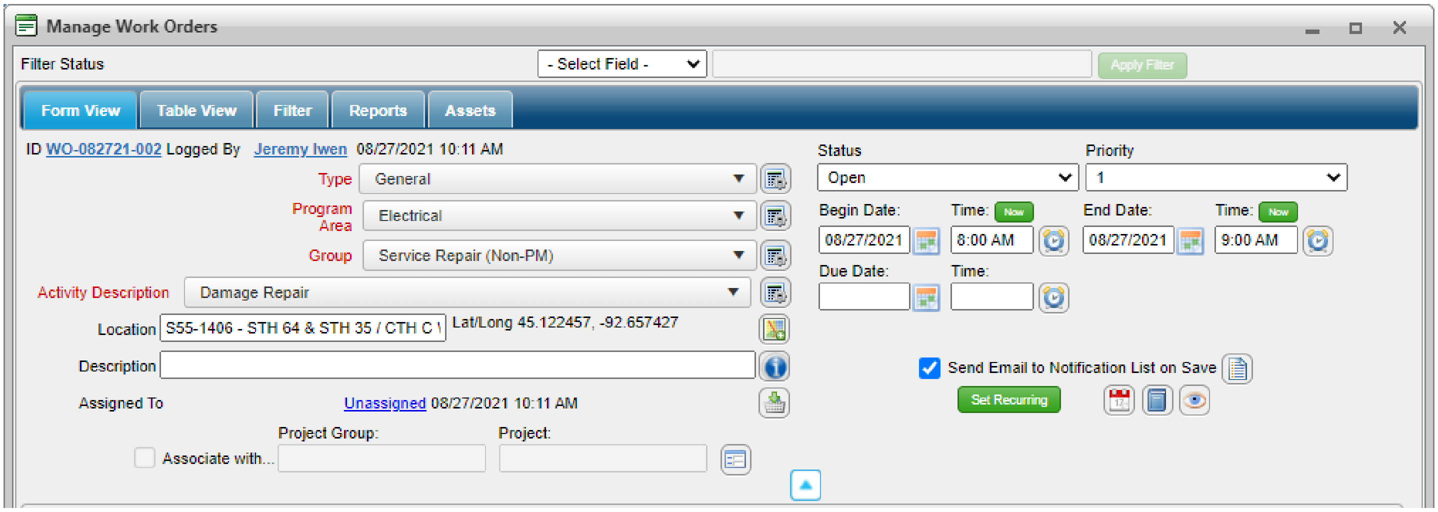
More information about the activity description can be found here: https://wisconsindot.gov/dtsdManuals/traffic-ops/manuals-and-standards/toams/elect-wo-activity.pdf

12. When the information has been added, click **Create**



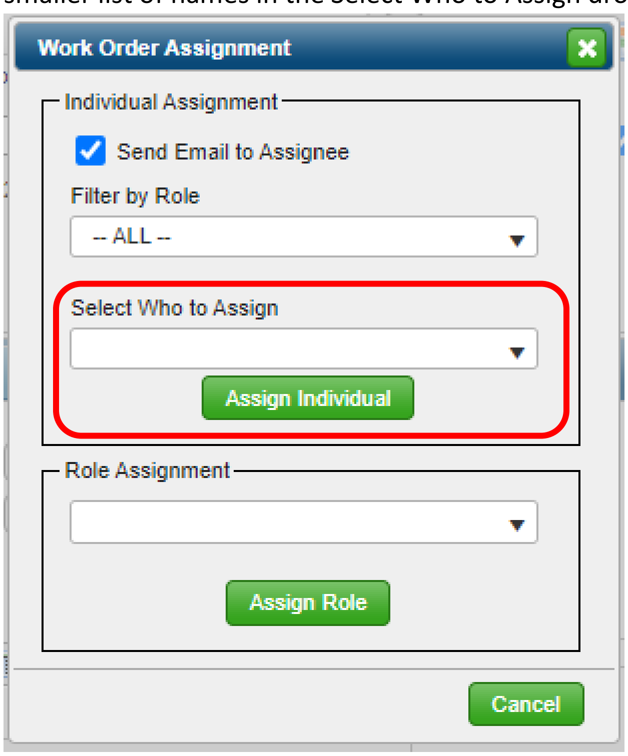
13. After clicking Create, the Manage Work Orders window will open. If the previous steps were completed correctly, most of the information should be filled into the work order header.

B. Populate Information in the Header



14. In the Manage Work Orders window, populate additional field in the header:

    14.1 Assigned To: Click the icon. Type your 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 your 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.



14.2 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: if you close the work order and would like it reopened, you will need to email TOAMS Support (DOTDLDTSDBTOTOAMSSupport@dot.wi.gov)

14.3 Priority: This dialog box can be left with its default value

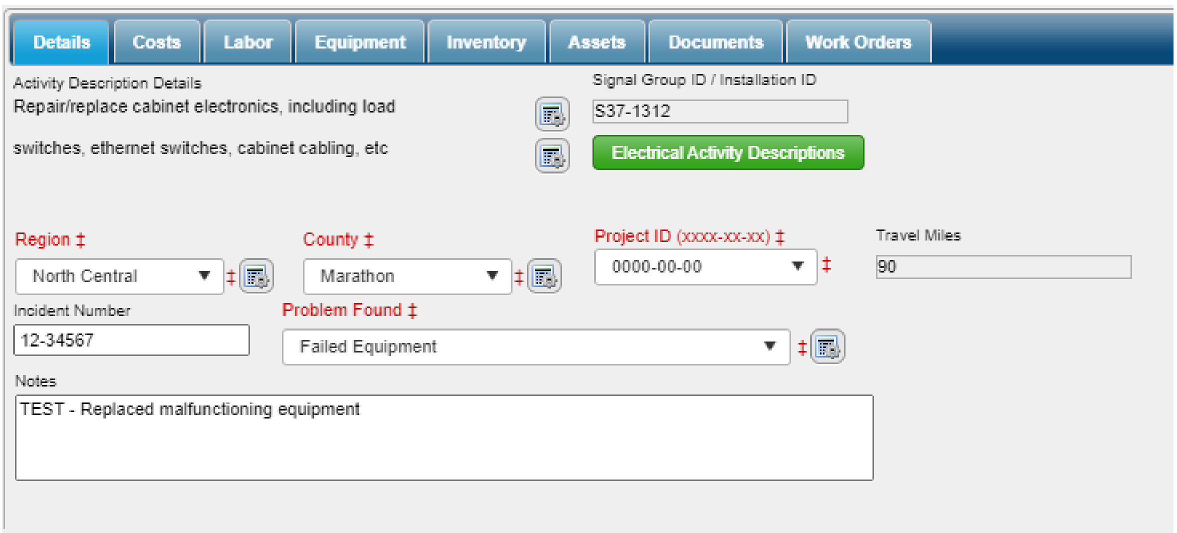
14.4 Begin Date / Begin Time: This is the date and time that the field work was started

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

15. 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

16. 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:*



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

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

16.3 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).

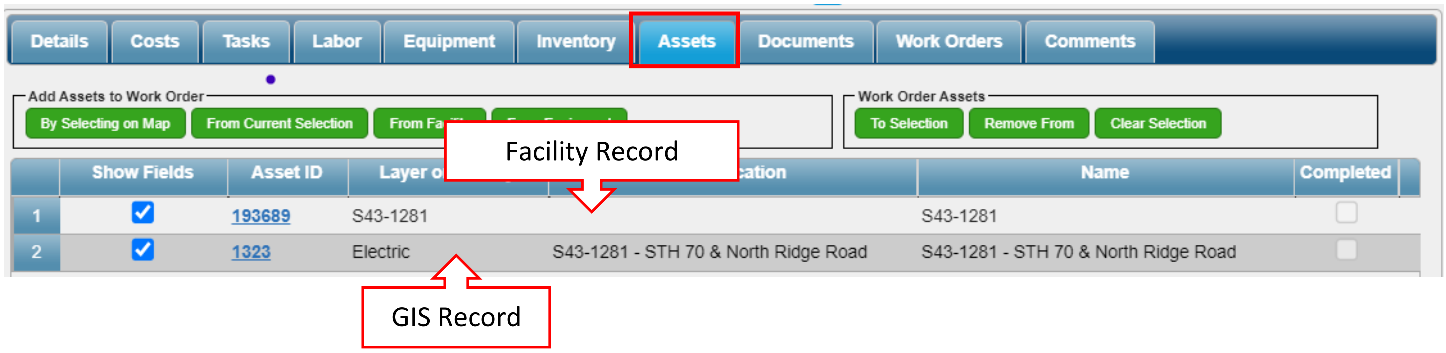
16.4 Incident Number: This is the location where you can add the SINS number or the Incident Number, if

16.5 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.

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

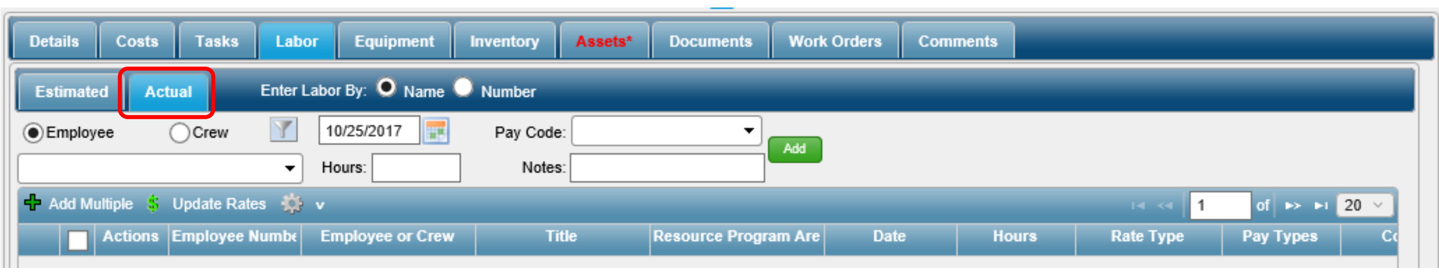
*If selected **Activity Description** needs to be changed after saving the Work Order, be sure to clear all data on the **Details** tab *before* changing **Activity Description**.

17. 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.

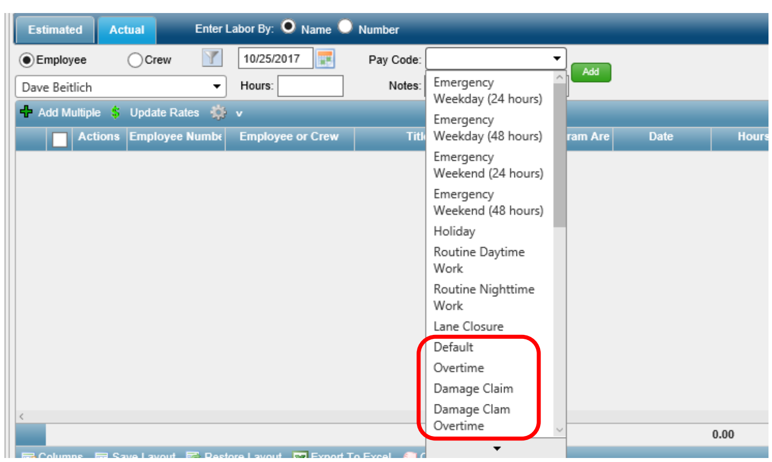


D. Populate Information in the Labor Tab

18. 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 21. If entering labor data, be sure you are working on the sub-tab labelled **Actual**.



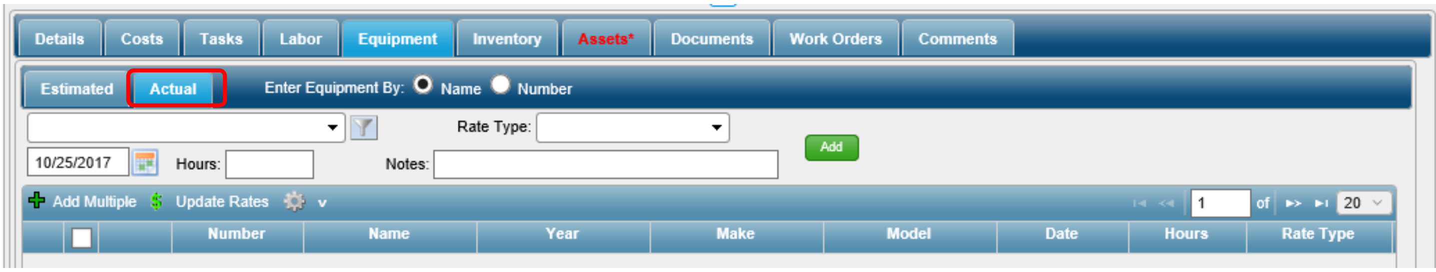
19. Using the left most drop-down, select the name of an **Employee**. Enter the hours worked for each pay code in the **Hours** box and then use the drop-down to select the **Pay Code** based on the following criteria:
    19.1 Select **Default** if the work was completed during normal business hours.
    19.2 Select **Overtime** if the work was completed while the employee was on overtime.
    19.3 Select **Damage Claim** if the work was completed during normal business hours and is associated with responding to a knockdown.
    19.4 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.



20. Click on **Add** to create the record. Repeat steps 18 & 19 for each employee and each pay code.

E. Populate Information in the Equipment Tab

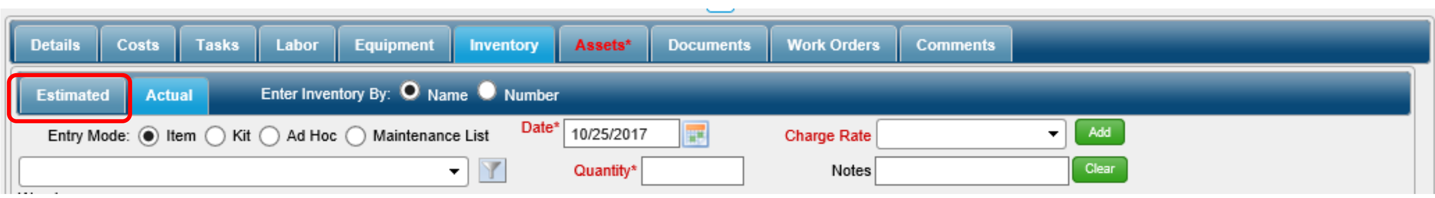
21. The **Equipment** tab is used when equipment is to be billed against the **Project ID** listed for the work order on the **Details** tab. If no equipment information is required for this work order, skip to step 24. If entering equipment data, be sure you are working on the sub-tab labelled **Actual**.

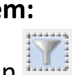


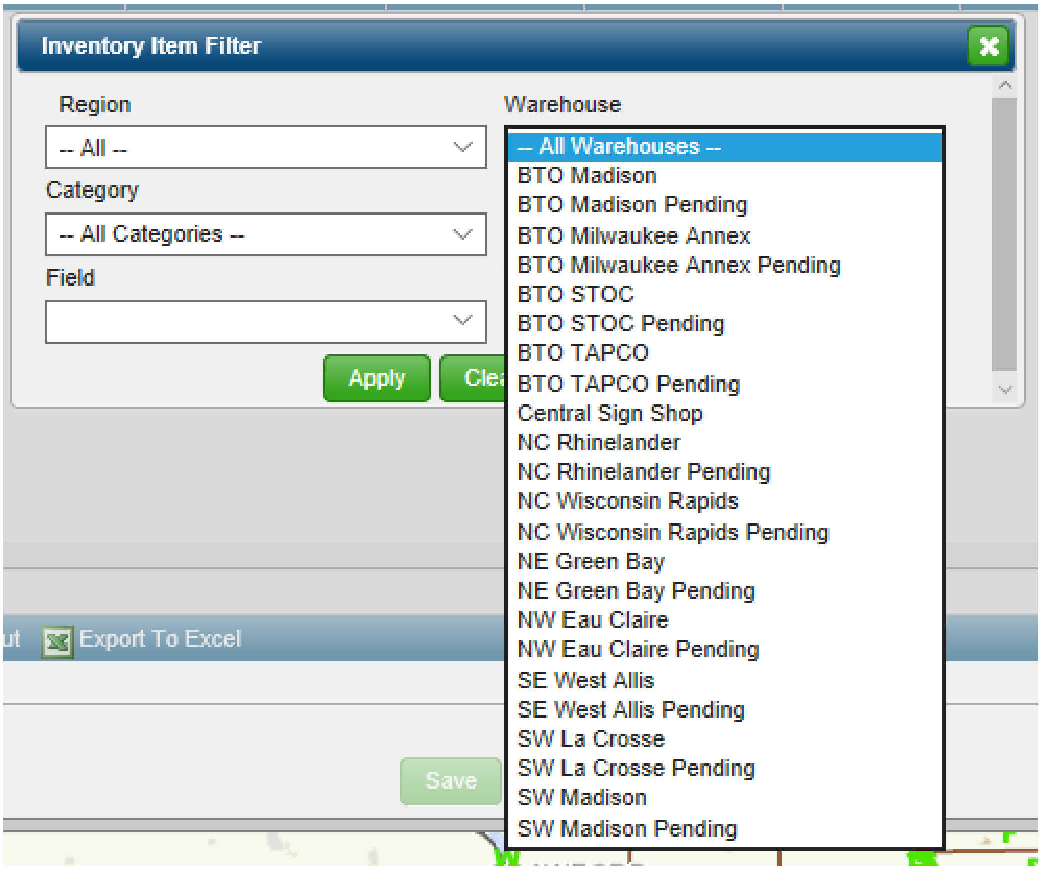
22. Using the left most drop-down, select the name of the **Equipment** used. Populate the remaining fields as follows:
    22.1 Rate Type: Select whether the piece of equipment selected is billed on an **Hourly** or a **Mileage** basis.
    22.2 Hours: This field is where you would enter the number of hours the piece of equipment was used OR the number of miles the equipment travelled, depending on the **Rate Type** selected.
23. Click **Add** to create the record. Repeat steps 21 & 22 for each piece of equipment used.

F. Populate Information in the Inventory Tab

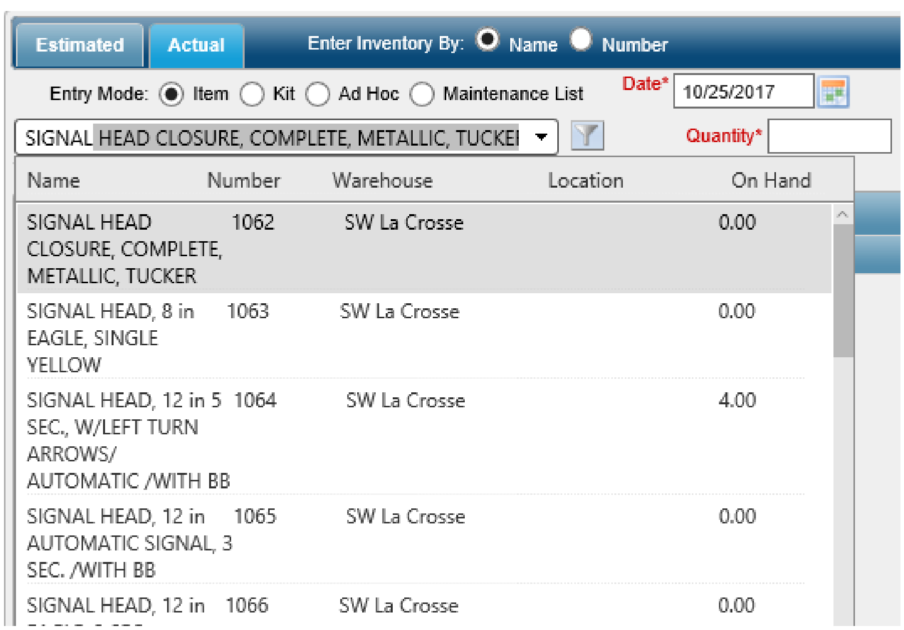
24. The **Inventory** tab is used when inventory items are to be billed against the **Project ID** listed for the work order on the **Details** tab. If no inventory is required for this work order, skip to step 29. If entering inventory data, be sure you are working on the sub-tab labelled **Estimated**.



25. 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 25.1. If your entry mode is **Ad Hoc**, skip to 25.2.
    25.1 When your entry mode is **Item:**
        25.1.1 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**.



25.1.2 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.



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

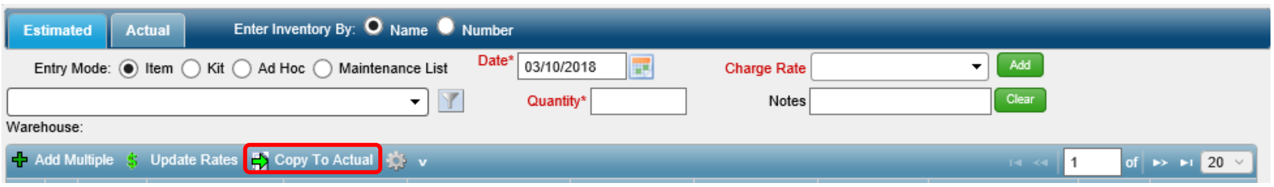
25.1.4 Click **Add**.

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

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

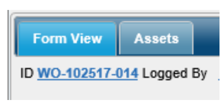
25.2.2 Add a value into the **Quantity** field.
25.2.3 Add a price into the **Charge Rate** field.
25.2.4 Click **Add.**

26. Repeat step 25 for all additional inventory items.
27. Edit and/or Delete estimated inventory items as needed.
28. 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.



G. Close / Save a Work Order

29. 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: If the work order needs to be reopened, contact a TOAMS administrator (DOTDLDTSDBTOTOAMSSupport@dot.wi.gov)
30. 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.



31. Click **Close** (located at the bottom of the form) to close this window.
32. 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.