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Work Management System User Guide

Work Management Basics

Navigate to your Work Management website and login in, the screen above should be seen, and your credentials can be entered.

Once in the Work Management System (WMS), a series of empty fields will be displayed at the top of the screen, and a listing of work orders that have been entered into the system will be displayed underneath. (see below)

The top portion of the home screen is used to filter the results of the work orders on the bottom. Almost all aspects of the work order can be used to filter your results. You can also use the check box in the middle of the screen to show completed work orders within your filtered criteria.
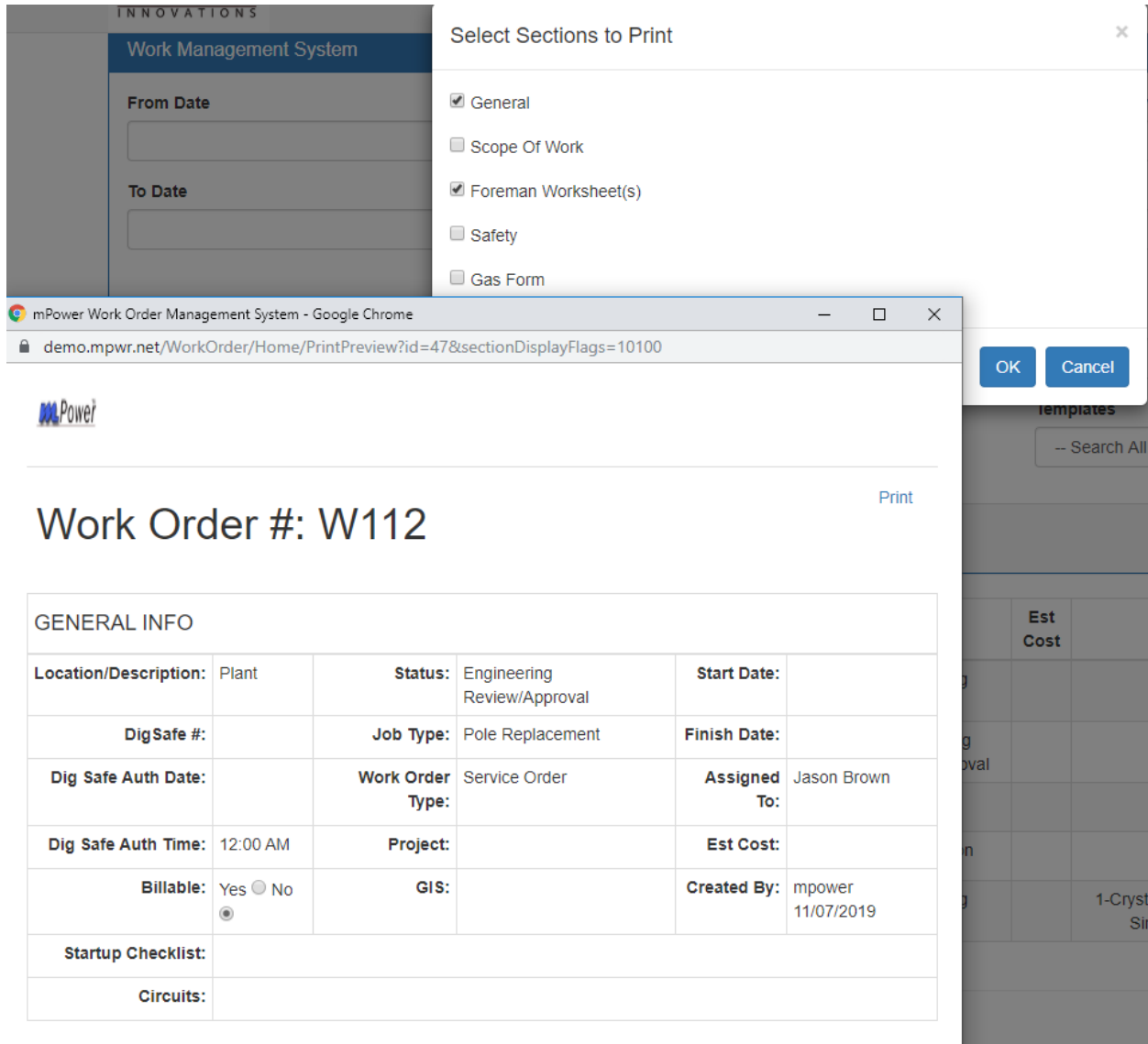
Edit and Print Work Orders

To access a work order listed on the bottom of the screen you are given two options:

1. **Edit**
2. **Print**

Edit	Print	Work Order #	Location/Description	Created Date	Work Order Type	Job Type	Status	Est Cost	Project	Assigned To	Delete
☑	🖨	E113	Plant	11/07/2019	Trouble Call	Overhead Maintenance	Scheduling				🗑

Edit allows you to enter the work order and change aspects of it depending on your permissions. This is used for field workers to enter time, material, notes, or other pertinent information as the work order is being completed. This also allows supervisors to update information if the work order changes after its creation.

Print allows you to select the information inside of the work order and creates a pdf document. This document can then be shared or printed for others to view. You have the option to select which parts of the work order you want to see.

Creating a Work Order

Administrators can easily create work orders and assign them to proper personnel. On the main screen select the green **+Add** button to get started.

After clicking the +Add button, you will see a screen similar to the home screen. Here you can fill out all relevant fields for your work order.

At the top of the page, you will see multiple tabs. These tabs give you more areas to add important information about the work order you are creating.

General Information

The **General Information tab** is the area that holds the main information of the work order. This includes the where/why/when/and who aspect of the job as seen above.

There are two fields that are mandatory, **Work Order #** and **Location/Description**. These fields must be completed to save a new work order. They are designated by a red asterisk to help you remember to add information.

Scope of Work

The **Scope of Work tab** is a text area that allows you to enter job details that apply to the work order. This can include materials to use, site information, or any other details that the field workers need to complete the work order.

Foreman Worksheets

The Foreman Worksheets tab is where the field workers fill out their time and material for the project. They can also add comments and record dates that work was being performed.

Using Trouble Ticket

If you choose to create a work order using the **trouble ticket radio button** in the General Information tab, more options will be given in the center of the foreman worksheet specifically for trouble tickets.

Trouble ticket radio button from general information tab

Below are the extra fields that appear when trouble ticket is set to 'Yes'

Safety

The **Safety tab** is much like the Scope of Work tab as it is another text area that allows you to enter any job specific safety information that the field workers need to know. This can also be an area where tailboard questions can be housed.
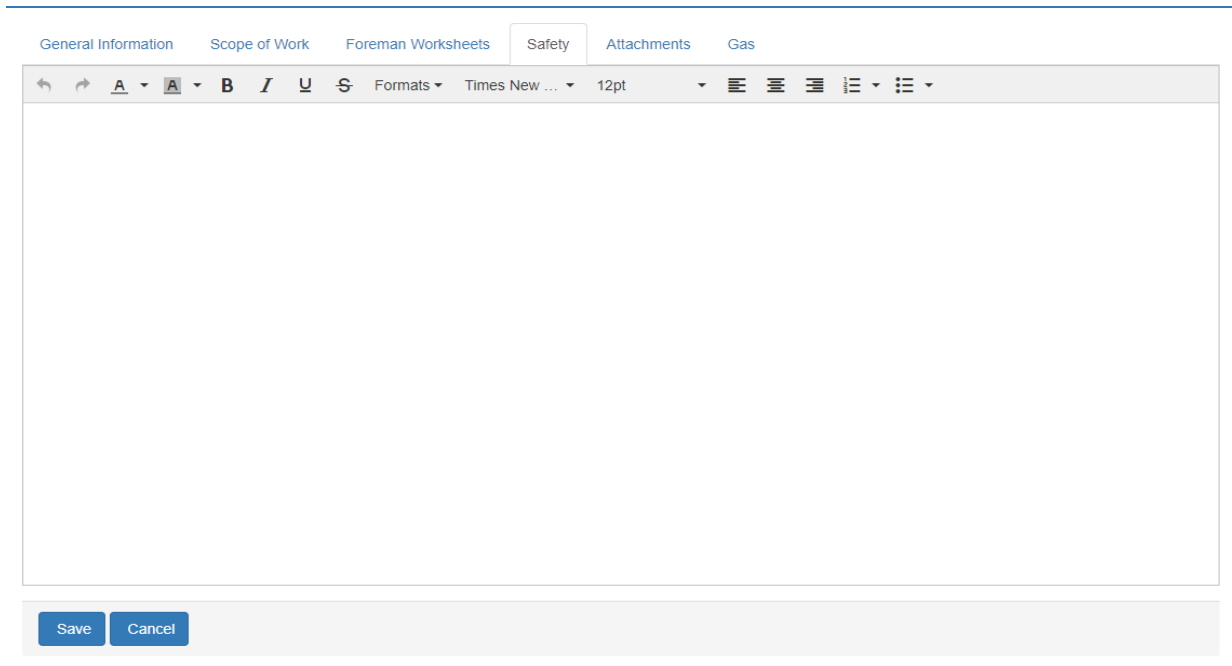
Attachments

The Attachments tab is a holding area for any documents, pictures, scans, etc. that support the work order. This is a good place to attach permits, contracts, or other important items that you want to stay with the job.
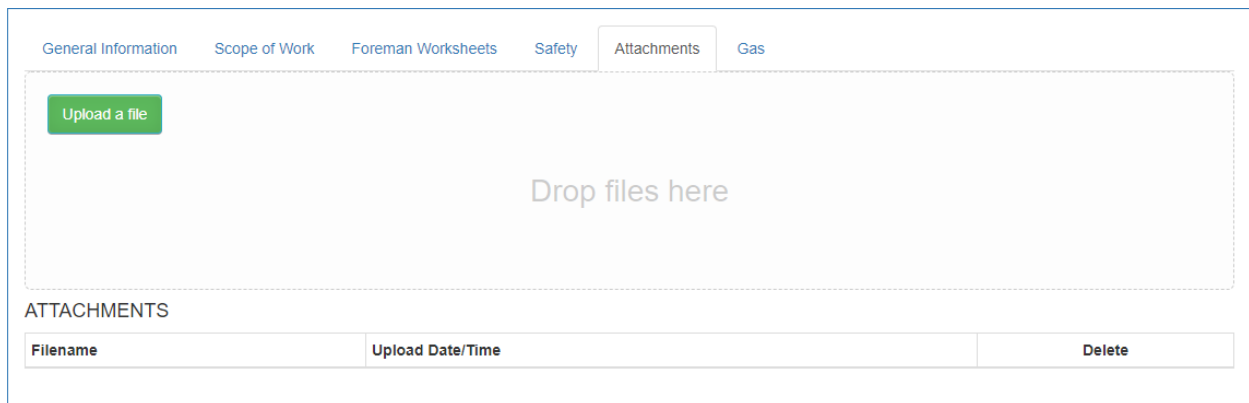
After all information has been entered in the work order you can return to the General Information tab and save the work order. This can be done at any point in the process.

You have two options for saving the work order: You can click **Save** or **Save as Template.** If you choose Save as Template all information will be saved and can be used again in the future. This option is best used for reoccurring tasks that are done frequently. This enables you to keep all relevant information with no reentry needed.

Templates

Saved Templates are shown on the home screen with a plus symbol (+) to the left of the work order. To create a work order using a template, simply click the plus (+) button. A yellow ribbon at the top will inform you that you are working with a template and you can enter any additional data for the work order before saving.

Administration

The heart and soul of the WMS resides within the Administration area located at the top of the home screen. **The administration area is only available to those with administrative rights**. When in the administration area you have access to customize almost all aspects of the software.
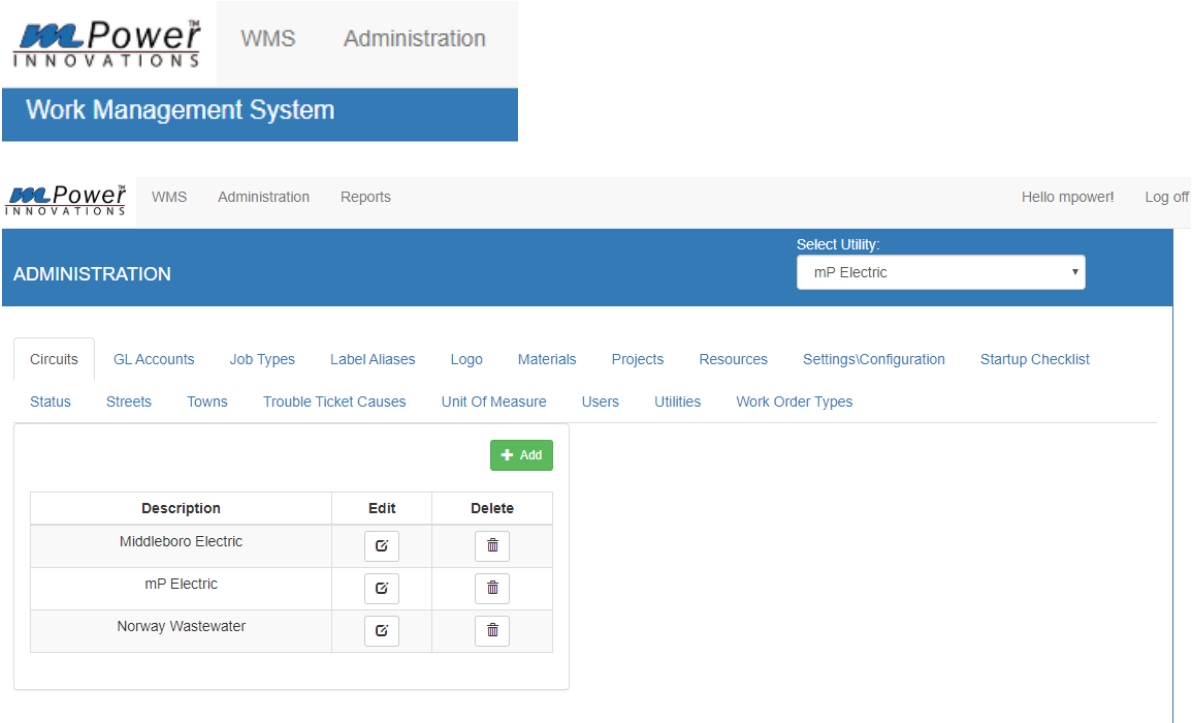
When inside of the administration area, you will see rows of tabs that correlate to the drop-down options when creating a work order. In each one of these tabs the content inside is completely customizable to each distinct utility that you have set up. For example, if you have an electric and water utility using the work management software, each utility has its own set of options within the tabs.
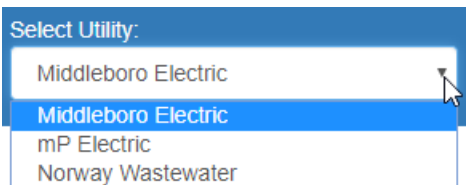
In this case three separate entities are using the software. Each would be able customize each tab separately.

In most tabs there is a simple **+ Add button** to create your options. Once your options are listed you will then be able to either delete or edit those options if they happen to change later.
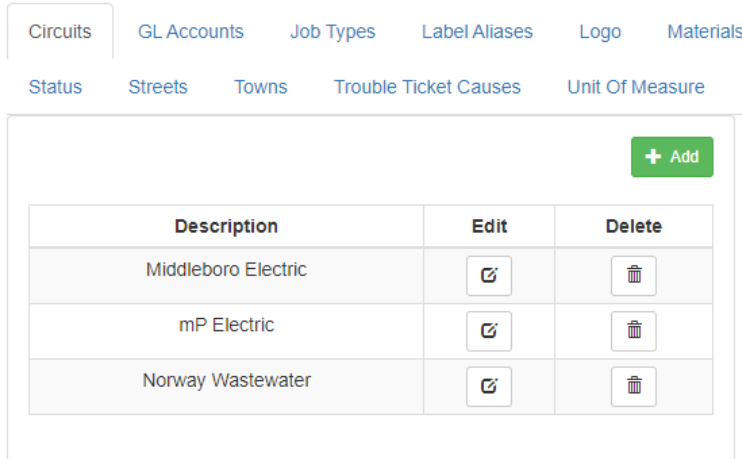
Above is a typical look inside a tab. You can enter a description and then edit or delete the entry.

Utilities

Next, we will go through the tabs in the order of which you would go to set up the WMS from scratch. First, start in the **Utilities Tab**, here you will set the utilities or departments that will be using the software (See Above)

Users

This tab is used to create users of the software by utility or department and what permissions they will have. Each user is assigned a utility/department and that will be what is defaulted for them on login.

There are 4 levels of permissions

1. Administrator – Full rights to add/edit/delete
2. General Foreman – Can create a work order
3. Truck foreman – Can only fill out foreman worksheets
4. View only – No editing privileges
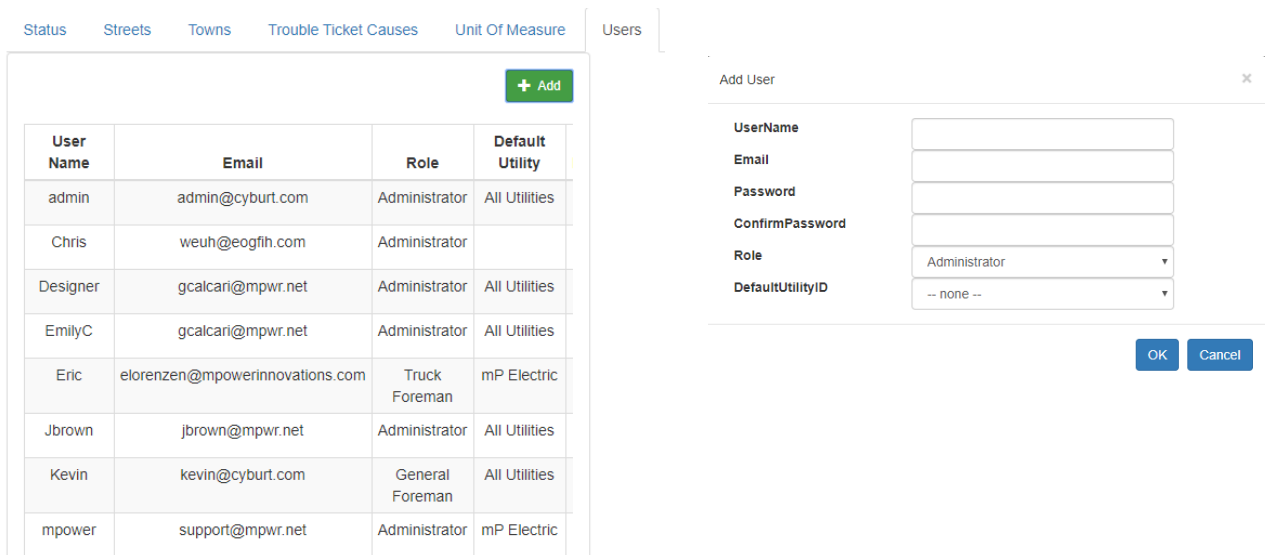
Settings and Configuration

This area houses options that will give the WMS specific functionality (see below).

1. Gas Form Enabled: You will only want this feature enabled if you have a gas utility. This allows the gas tab to be visible
2. Rolling Ticket Status: This allows the status of a ticket to be changed to completed when a foreman worksheet has been submitted.
3. Trouble Ticket Enabled: This gives the option of creating trouble tickets when creating a work order. When trouble ticket is selected the foreman worksheet shows more options that are specific to trouble tickets.
4. Work Order Auto-Number Enabled: This allows you to set a specific starting number for each utility. When you create the next work order it will automatically be assigned the next number in the sequence.

Label Aliases

This tab allows you to change some of the categories on the general information tab to better align with your terminology (see below).

Circuits

This tab is used for identifying feeders or other utility specific areas that you want to establish. Circuits are part of the label alias so you can change the tab to suite your utility.

GL Accounts

This tab is used to house any account numbers that you want project time and material to be billed against.

Work Order Types

This tab is used to set up categories of work order types that your utility uses. These can be as vague or detailed as you want.

Job Types

This area is available to get more granular within a specified work order.

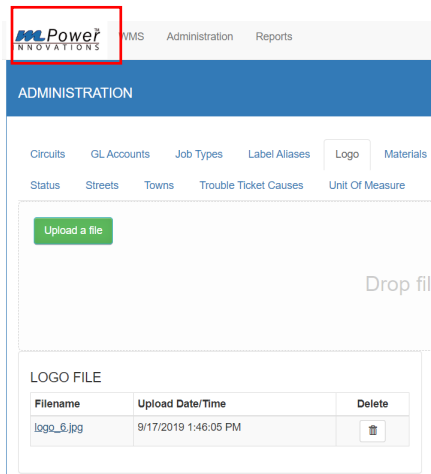Circuits   GL Accounts   Job Types   Label Aliases   Logo   Materials

Status   Streets   Towns   Trouble Ticket Causes   Unit Of Measure

Description	Edit	Delete
Emergency		
Overhead Construction		
Overhead Maintenance		
Pole Replacement		
Street Light		
Underground Construction		
Underground Maintenance		

Logo

This area allows you to upload a version of your own logo to be used within the WMS system. The logo is also visible when printing if you are working with contractors outside your organization. This will take the place of the mPower logo in the upper left-hand corner of the screen.


Materials

Material list for each utility can be stored here for use when filling out foreman worksheets.

Circuits	GL Accounts	Job Types	Label Aliases	Logo	Materials
Status	Streets	Towns	Trouble Ticket Causes	Unit Of Measure	U

+ Add

| Item #	Description	Edit	Delete
671117	4 Position Module		
640286	Alley Arm Assembly		
640155	Anchor 6" With Rod		
640130	Anchor Large 14"		
640150	Anchor Small 10"		
640120	Anchor, Triple Helix		
711305	Area Light 100 HPS		
650560	Arrester 10 KV Line Type		
650540	Arrester 10 KV Riser Pole		

Projects

This area can be used if you have large scale developments that may require multiple work orders. Some use this area to track monthly work orders for the same tasks.

Circuits	GL Accounts	Job Types	Label Aliases	Logo	Materials	Projects
Status	Streets	Towns	Trouble Ticket Causes	Unit Of Measure	Users	Utilit

+ Add

Project #	Project Name	Project Manager	Edit	Delete
1	Crystal Lake Subdivision Single Phase UG	EmilyC		
2	Birchwood Mall 3-Phase Underground			
3	Frontage Road 3-Phase OH Rebuild			

Resources

This tab is used to enter all staff, equipment, and other items that can be billed for their use. These entries will be used when filling out the foreman worksheet.

Circuits	GL Accounts	Job Types	Label Aliases	Logo	Materials	Projects	Resources

| Status	Streets	Towns	Trouble Ticket Causes	Unit Of Measure	Users	Utilities	Work O

+ Add

Description	Edit	Delete
Eric Lorenzen		
Greg Calcari		
Jason Brown		
John Felton		
Line Foreman		
Lineman #1		
Meter Technician		
Substation Technician		

Startup Checklist

This focuses on organization of the work order process, it can be a series of steps that have to be taken before the work order can be assigned. It can also be steps that go through the entire life span of the work order.

Circuits	GL Accounts	Job Types	Label Aliases	Logo	Materials	Projects	Resources	Settings\Configuration	Startup Checklist

Status	Streets	Towns	Trouble Ticket Causes	Unit Of Measure	Users	Utilities	Work Order Types

+ Add

Description	Edit	Delete
Customer Letters Sent		
Deposit Received		
Easement Obtained		
Inventory Updated		
Mapping Revised		
Outages Scheduled		
Permits Acquired		
Service Inspection Completed		
Service Order Received		

Status

Permits a way to track the progress of a work order, or to answer that question of: "Who's desk is it on?"

Status	Streets	Towns	Trouble Ticket Causes	Unit Of Measure	

+ Add

Description	Order	Edit	Delete
Construction	0	✎	🗑
Engineering Review/Approval	0	✎	🗑
GIS/Mapping	0	✎	🗑
Immediate Attention	0	✎	🗑
Preliminary Design	0	✎	🗑
Scheduling	0	✎	🗑

Streets and Towns

These are two different tabs but serve the same purpose. Many utilities cover more than one municipality, within those different municipalities you may have more than one street with the same name. This allows you to differentiate between those street names for better clarity when creating work orders.

Status	**Streets**	Towns	Trouble Ticket Causes	Unit Of Measure

+ Add

Name	Edit	Delete

Trouble Ticket Causes

This allows you to add definition to what types of actions would constitute a trouble ticket. These are used within the foreman worksheet that have been created using the trouble ticket option.

Status	Streets	Towns	**Trouble Ticket Causes**	Unit Of Measure

+ Add

Description	Edit	Delete
Bad Arrestor	✎	🗑
Blown Fuse	✎	🗑
No Power	✎	🗑
Pole Kill	✎	🗑
Tree Down	✎	🗑

Unit of Measure

Based on the types of material that you are assigning for the job order you can also dictate the units on which they will be billed.

| Status | Streets | Towns | Trouble Ticket Causes | Unit Of Measure |

+ Add

Description	Edit	Delete
Cm	✎	🗑
Feet	✎	🗑
Ft	✎	🗑
In	✎	🗑