OMS Online Manual

OMS Online is a Series of Modules on Using the Operations Management System (OMS) within the Transportation Education Program (TEP)

Operations Management System
OMS - ONLINE

Conventions Used in This Manual

To assist you in differentiating types of information or actions required of you, this manual uses the following typographical conventions that will help you when using the OMS Test system:

>	The greater-than sign separates menu levels (for example, File > Open).
CAPITALS	Upper case text indicates the names of keys on the keyboard (for example, SHIFT or CTRL or ALT+F4).
+	When used between keyboard keys, the plus sign indicates keys that must be pressed simultaneously to perform a command (for example, ALT+F4).
Bold	Commands are shown in a heavy bold font (for example, **Retrieve**).
Tahoma	The Tahoma font is used for text that appears in a window and statements that are to be typed in exactly as shown.
Title Caps	Title Capitalization often indicates a specific data element type (for example, Task, Service Request, Work Function).
Underline	Underlining indicates an agency element description such as a job title or a maintenance item.
	It may also be used to emphasize a point for your understanding.

MODULE A – GETTING STARTED

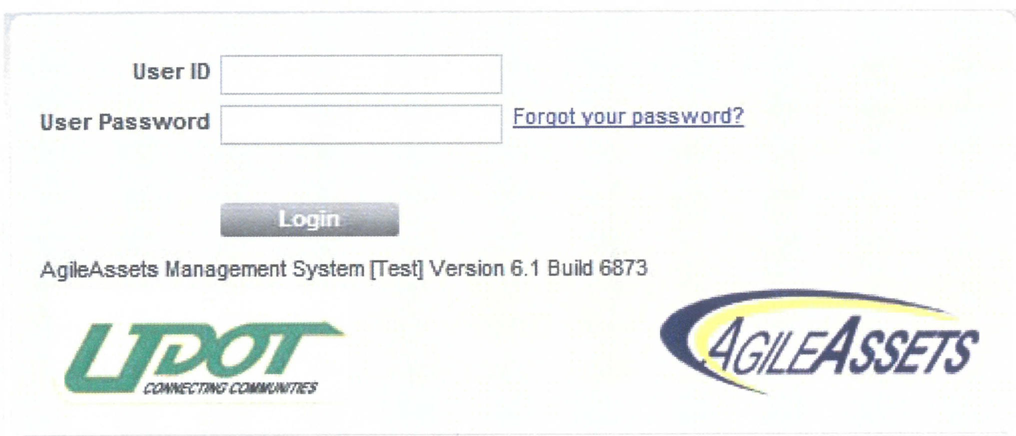
A-1 How to Log On

To launch and log on to the OMS, you need the following information:

- The URL (web address) to access the OMS Test System.
- Your user ID.
- Your user password.
- The administrative unit to which you are assigned.

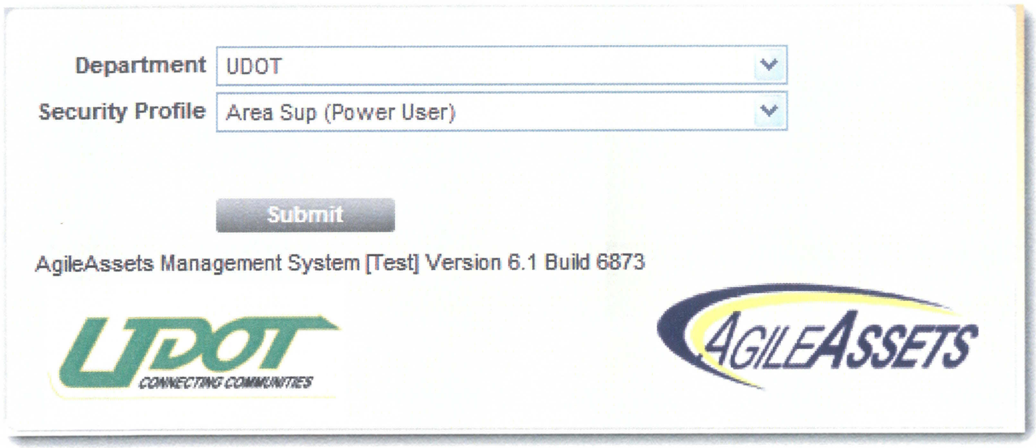
Once you have this information, follow these steps to log on:

1. Launch your Internet browser.
2. In the address window of the browser window, type the URL for where the system resides and press Enter. (Note: If this is the first time you are accessing the system, you should save this URL as a "favorite" to facilitate return visits.) After the Enter key is pressed, the browser window will show the log on window for the system. An example of this window is shown below.



3. In the User ID field, type your user ID. (If you have previously logged onto the system, the system will remember your user ID and so you will only need to enter your password.)
4. Press the Tab key to move the cursor to the User Password field and type your password.
   i) Note: User Passwords are case sensitive. If you are using your personal login for the first time, you will need to type the password using "UPPER CASE" letters. After logging in, you can then change the password as you like it (e.g. all lower case). If you are logging into the system using the 4-digit station number, make sure the caps lock button is off.
5. Click Login. The system checks the information you entered and, if recognized, logs you on to the system and displays a window to select your administrative unit. An example of this window is shown below.
   i) Note: You are only allowed a specific number of attempts to log on within a certain time period. (The System Administrator sets the number of attempts and time period.) After the

last unsuccessful attempt, you will be locked out of the system. You must contact the System Administrator to be allowed to log on to the system.



6. Click the down arrow to display the administrative units, locate the desired unit, and then click the desired unit. (Note that if you have previously logged onto the system, the system will remember the unit you last used and so you may skip this step.)

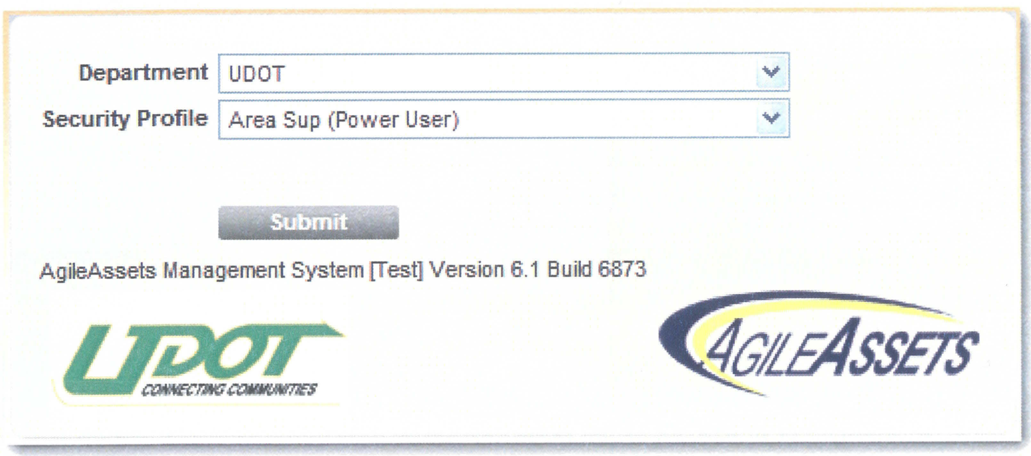
   Note: The selection of an administrative unit is important. At various points in the system, the phrase "use current" appears. The current unit is the unit you selected when you logged on.

   - Click **Submit**. You are now fully logged onto the system, and the system displays the main window of the application. This window shows all available modules. Click a module name to access the features of that module.

A-2 How to Select a Different Administrative Unit

Once you are logged on, you may change the administrative unit you selected during the log-on process by performing the following steps:

1. Click the  icon in the left gutter. The system displays the Select Department window shown below.



2. Click the down arrow next to the Department label to display the list of administrative units, scroll through and locate the desired unit, and then click the desired unit.
3. The Security Profile widow will show the Security level in-which you are assigned.
4. Click **Submit**. You are now logged on under a different administrative unit.

A-3 Navigation & Quick Links

The OMS provides the following ways to navigate to, and within, the windows in the system: "point & click" commands, table navigation via scroll bars and a table navigation toolbar, and Quicklinks (which is a special, customizable form of hyperlinks).

You display a window by selecting a series of commands from menus. For example, to display the Material Management window (which is in the Resources module), perform the following steps:

1. Since the default active module is Roadway, click **Resources** to activate the Resources module. After selecting this module, the menu bar on the second line of the window changes to show the menus of the Resources module.
2. Hover over and click **Materials**. This displays the submenus of the Materials menu.
3. Hover over **Inventory**. This displays the Inventory submenu.
4. Click **Material Management**. The Material Management window is displayed.

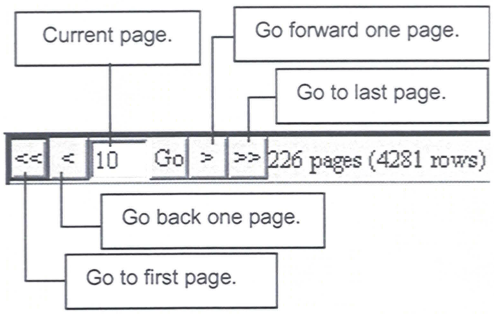
Graphically, this series of steps appears as shown below.

In the OMS tutorials, this entire series of actions is abbreviated as: "Resources > Materials > Inventory > Material Management."

Once a window is displayed, scroll bars are available to move what is viewable either vertically or horizontally. Be observant as to which scroll bars you select to use — two sets are provided (depending on the size of your browser window):

- One set is for the browser window, and these move the viewable portion of the entire browser window. They do not affect what is viewable within the OMS. (These will be absent if the browser window is large enough to entirely contain the displays of the OMS.)
- The second set applies to windows (and panes, which are subdivisions of a window) within the OMS. These change what is viewable in the OMS.

In addition to scroll bars, tables also provide a navigation toolbar. The tables that are displayed in the OMS are often quite large. In these large tables, the number of records (rows) is greater than what may be displayed at one time in a window or pane. So the table is divided into multiple pages. A navigation toolbar similar to the following appears at the top of every table to inform you of the number of pages and rows in the table and to allow you to navigate to different pages:

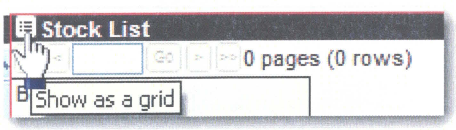


You may click the buttons as indicated to navigate to different pages in the table. You may also double-click the displayed page number, type a new page number, and then click **Go** (or press Enter on the keyboard) to display that particular page.

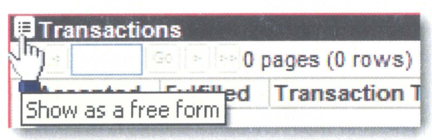
Note that the vertical scroll bar that appears along the side of a window that shows a table cannot be used to move from page to page. The scroll bar only allows you to change what is viewable for the page that is displayed in the window or pane.

Another feature available in each window is the Grid / Free Form view icons. Form View is useful if the record contains many fields that can't be seen without scrolling across the grid/table view. To switch back and forth between two, simply double click the icons.

Grid View



Form View



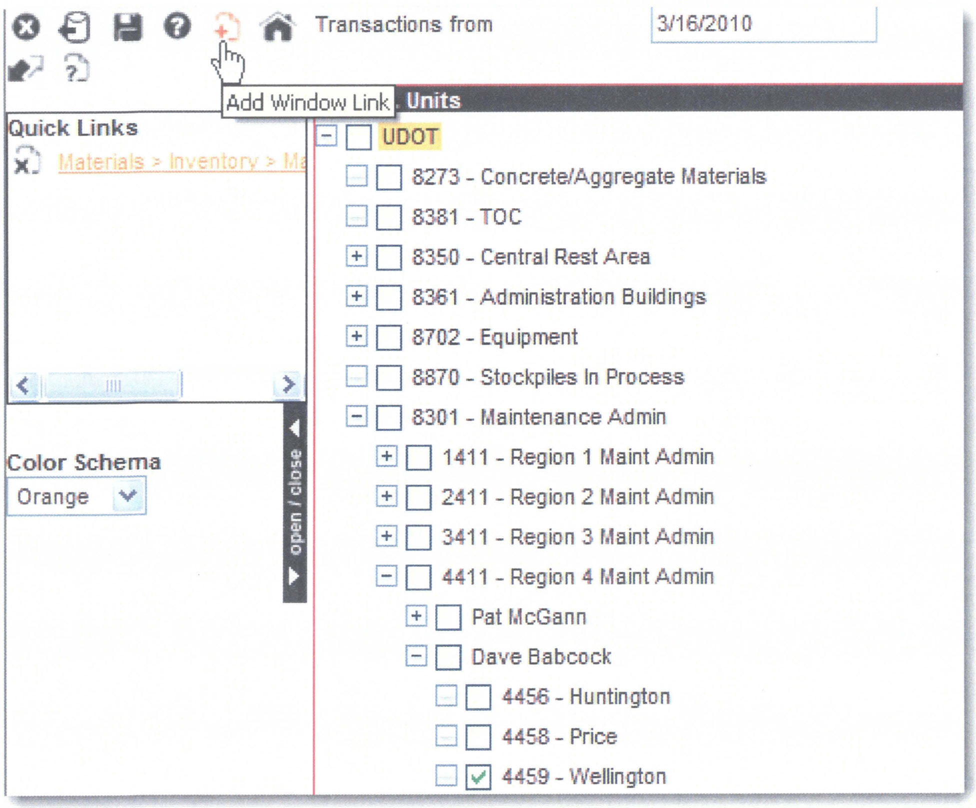
How to Create Quick Links

Quick Links provide a handy way to quickly navigate to frequently used windows from a module's main menu. These are essentially customizable hyperlinks that remove the necessity of "pointing & clicking" to get to a window within the module. (You cannot establish a Quick Link to a window in a different module.)

For example, say you would like to move quickly to the Material Management window within the Resources module. Ordinarily, you would need to perform the series of steps shown on the previous page. This involves several "points & clicks." You could shorten this navigational path considerably by establishing a Quick Link to the Material Management window as described below:

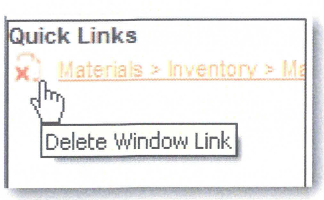
1. Display the Material Management window (Resources > Materials > Inventory > Material Management).

2. In the left gutter, click the  icon.



3. Navigate to another window. A Quick Links table appears in the main window for the Resources module with Materials > Inventory > Material Management shown as a hyperlink in the table. Now, whenever you select the Resources module, you may simply click this hyperlink to directly display the Material Management window rather than "point & click" through the series of menus.

This Quick Link can be removed by simply selecting the **Delete Quick Link** icon  next to the Material Management hyperlink.



A-4 Other Main Window Icons

The main window provides the following additional icons that remain displayed regardless of the window selected:

 Exit -- This icon closes the application.

 Retrieve -- This icon retrieves the latest data for the displayed window from the database. Note that this will overwrite any new, unsaved data (meaning that the unsaved data will be lost).

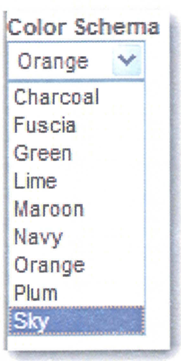
 Save -- This icon stores the new data in the window in the database.

 Help -- This icon displays Help information for the displayed window.

 Home -- This icon displays the Home window for the selected module. (The Home window is typically a blank tab.)

 Manage Window Links -- This icon displays a new window in which you may configure Quick Link groups (which in turn determine what Quick Links are shown in the left gutter) as well as text that is displayed when you hover the cursor over a Quick Link hyperlink.

Appears only when there is a new message in the Messages window. Each module has its own Messages window.



The color schema may be changed to your personal preference. To accomplish this, select the down arrow and choose the desired color.

The left gutter can be collapsed to make the working area larger. To collapse the left gutter, click on the open/close icon located on the side of the left gutter.

How to Seek Help

Every effort is made to ensure that you can successfully use the OMS to efficiently perform the tasks of your job. Yet, at times, questions may arise about particular features or how to perform certain tasks. Two sources of assistance are provided to help you:

- The OMS system includes a comprehensive Help system. This system contains information on all features of the system and provides instructions on using many features of the system. To access the Help system, select the Help icon in the far left pane of the OMS screen.
- The second source of assistance is the UDOT OMS administration and OMS trainers. UDOT has setup a Help Desk which is staffed by experienced users/trainers who can help you with log-on issues and UDOT organizational issues (as related to the OMS) as well as with the use of the system. Contact your Region Analyst for more information on obtaining help with the OMS.

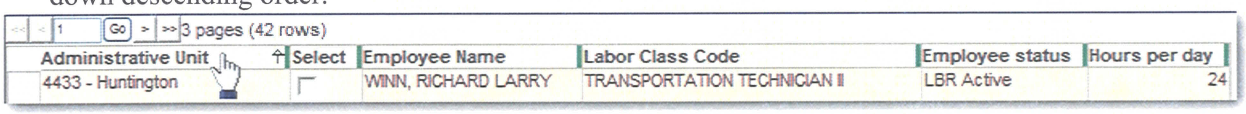
A-5 Shortcut Menus

Right clicking within any window displays a shortcut menu. The commands shown in the menu will differ depending on which window and pane you are in. However, there are some commands that are common to most tables in the system:

How to use Sort Command:

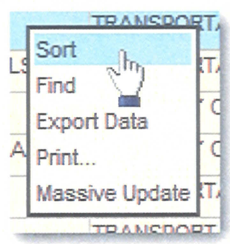
The **Sort** command allows you to sort a table using multiple fields. There are 2 different way of sorting a table.
Navigate to the following window: **Roadway > Setup/Inventory > Shortlist > Labor Shortlist**

1- Double click on the column header bar in the field that you want to sort by. This will sort the items in that field in ascending order. Double click the same field again to sort in descending order. An arrow will appear in the column that is sorted. Arrow pointed up is ascending and down descending order.

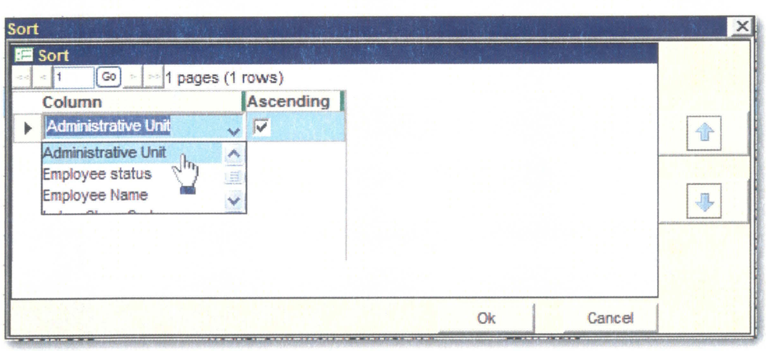


2- Sorting using the SORT Command

(a) Right click with your mouse inside the pane of the table you want to sort.
(b) Click on the sort option.



(c) Click on the dropdown arrow below the Column heading
(d) Scroll through the column headings and click on the heading you want to sort the table by
(e) Click the box to place a check mark in the Ascending column if you want your sort in ascending order. Leaving this box unchecked will sort in descending order.

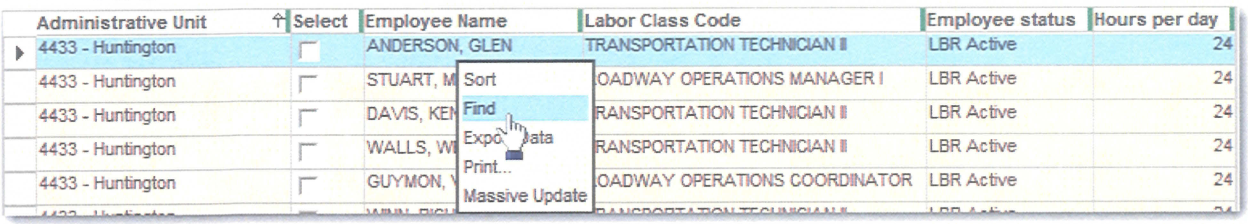


(f) Click OK

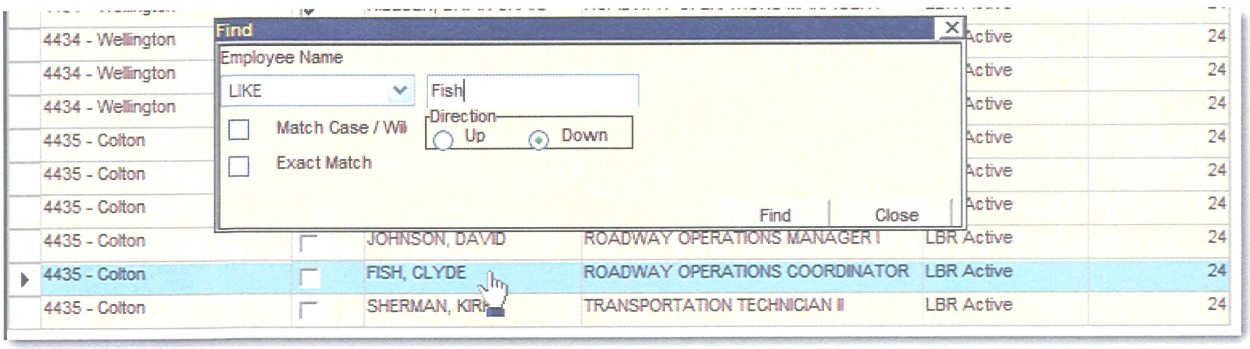
Use the **Find** command to locate a particular entry in a column of a table. In order to find a record, you **<u>must</u>** click within the desired column.

How to use the FIND command:

a. Navigate to the following window: **Roadway > Setup/Inventory > Shortlist > Labor Shortlist**
b. With your mouse pointer anywhere inside the Employee Name column, right click and select FIND



c. The Find dialog box appears. You will notice that the dropdown box already has the work LIKE inside it; this is because this is the only option during this type of Find. If this box were not filled in, you would need to click it to choose the option that bets fits your search.
d. Type your last name in the box next to the right of the dropdown menu. Click Find
e. The system will look through the table to find and highlight you name.
f. If someone else's name is highlighted, there may be more than one person with that name. In this case, press the find button again at it will take you to the next record that matches the criteria.



If your name does not appear, or you get an error message, make sure you right click inside the area of the Employee Name column. Try searching for other names and move to different columns to find other criteria.

You can also designate with direction the search is done by clicking on the Direction Up or Down buttons.

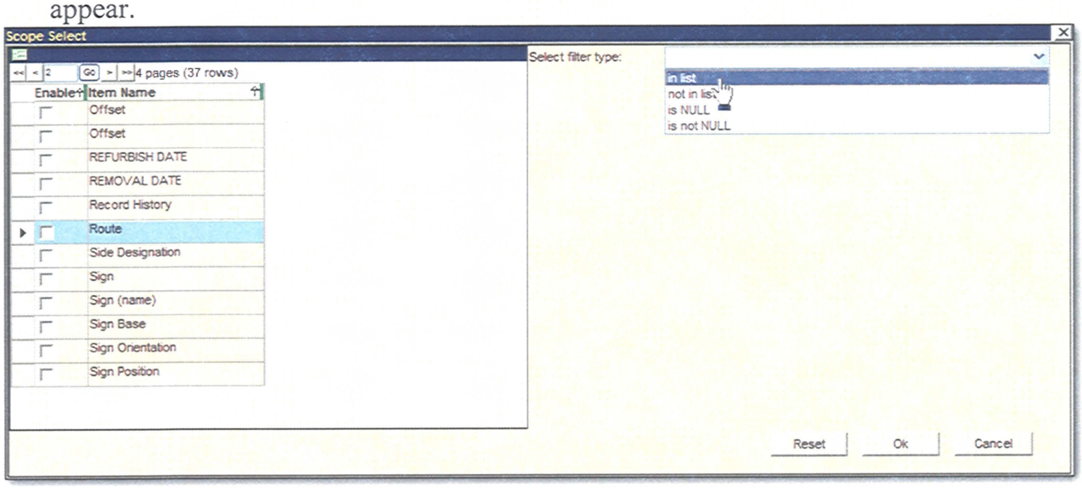
Filter - Filtering allows you to reduce the number of records displayed in a window by selecting only those with desired characteristics. Selecting **Filter** opens the Select Scope dialog box and similar to sorting, you can filter using multiple fields. If a window has a filter already applied, the  image in the upper left-hand corner of the window appears. Filtering is not available in every window.

How to apply a FILTER command:

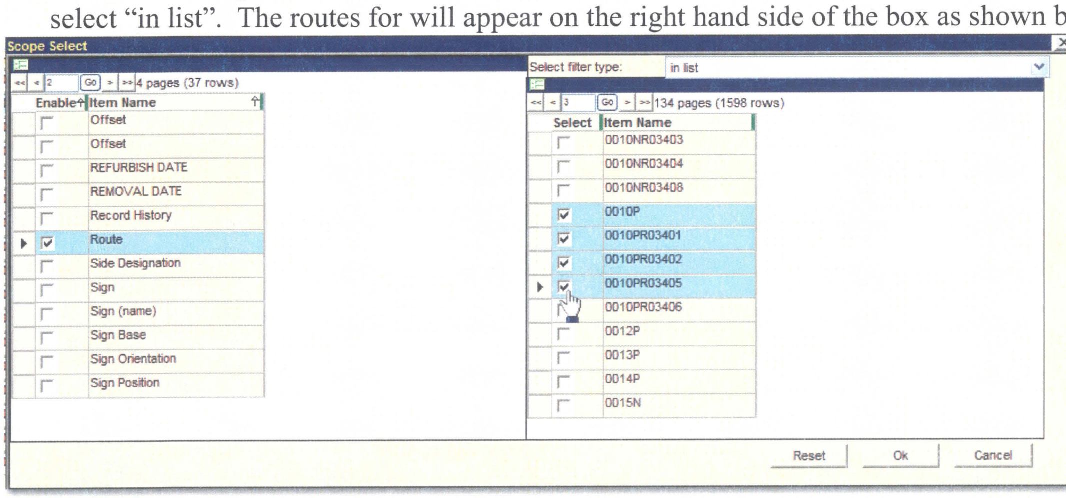
1. Navigate to the following window: **Roadway > Setup/Inventory > Feature Inventory > Signs > Sign Inventory**

The table displayed will be the Sign Inventory for the Station you are logged onto. Let's say you want to list only the signs on a particular route within your station boundaries.

2. Right click within the table and click on Filter
3. Using the page navigation tool bar located at the top of the screen, scroll through the options until you find the Route and click on it. It will highlight your selection and the following screen will appear.



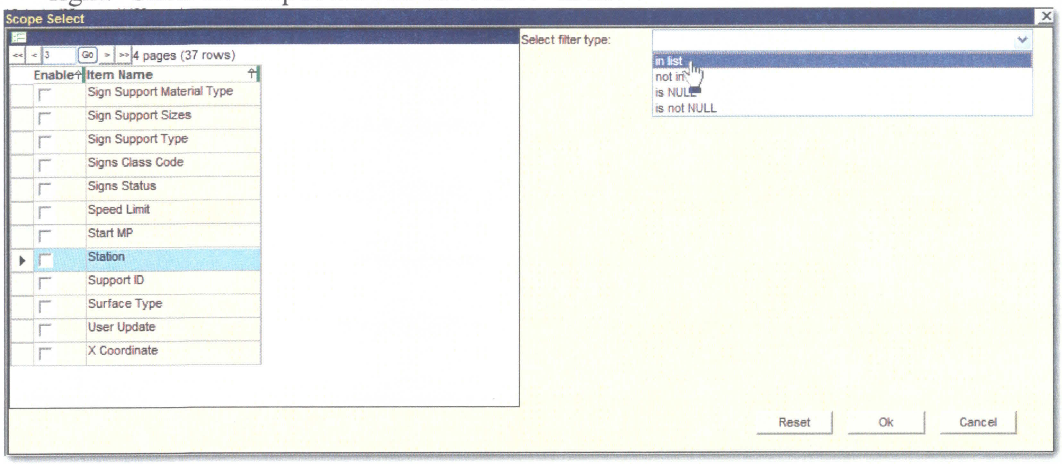
4. Click on the dropdown arrow in the Select Filter Type on the right side of the open pane and select "in list". The routes for will appear on the right hand side of the box as shown below.



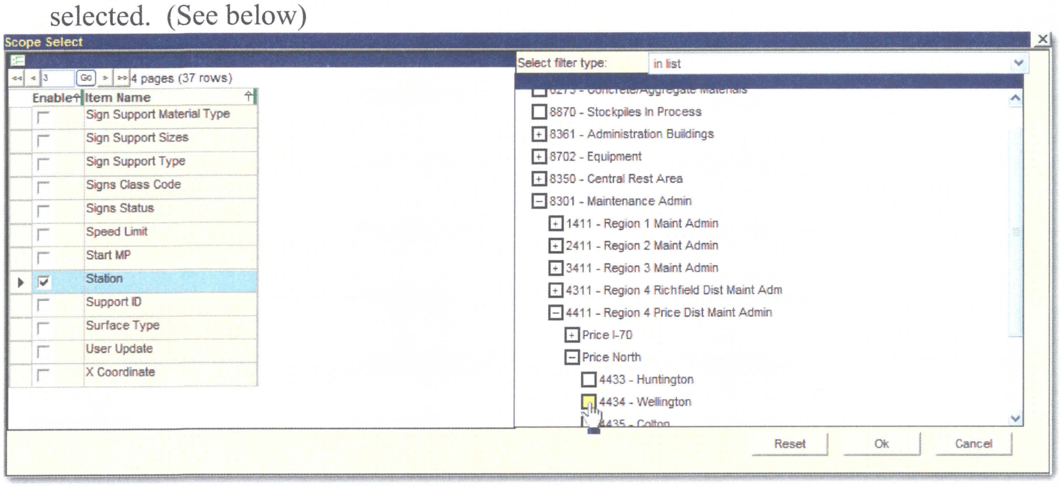
5. Using the page navigation tool bar locate the route(s) to want to filter by. If there are several pages, you may want to use the FIND command for an easier way to locate the route(s). To select multiple routes, you will need to hold down the Ctrl Key while clicking on the check box.

You will notice that the Route checkbox on the left box was automatically marked after the routes checkboxes came up in the right hand box.

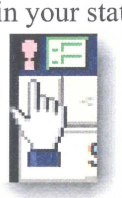
6. To select only the signs for your station in this Filter, you then navigate to the Station box checkbox on the left hand side and click it. This will return you to the "Select filter type" on the right. Click the dropdown box and select "in list".



7. This will bring up the UDOT filtering tree. Select your station by clicking on the + signs next to the description of the unit you want to filter. Since you are looking for a station you will click on "8301 – Maintenance Admin" to begin. In this example it shows I am logged onto station 4344 – Wellington, so it gives the path to that shed. You will want to create a path to your own station to prevent an error. When you get to the desired station the box will turn yellow to show it has been selected. (See below)



8. Now click OK at the bottom right to start the filter process.
9. You will notice the information displayed now only shows the signs form the route and mile post you designated within your station boundaries.



10. Also notice that the exclamation point icon is in the top left of the pane. This shows that there is a filter applied to the spreadsheet.

To Remove a FILTER:

To remove a filter, display the Filter window from a window or pane that contains the filtered column. In the left pane of the Filter window, click the record for the column to select it. Then click the Enable check box to remove the checkmark and remove the filter. Finally, click the OK button to close the filter window.

Note: To remove all filters, click the RESET button. This clears all checked boxes in the Enable column. Then click the OK button to close the filter window.

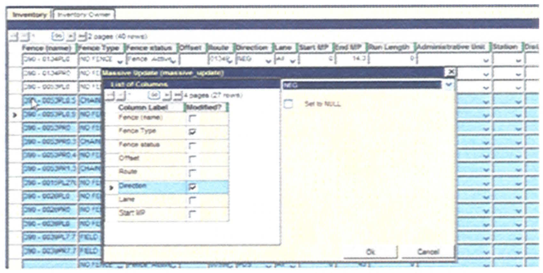
Export Data is available in windows or panes that show tabular data (tabular data is data exists within a table). It allows you to save the data in the table to a file outside of the system. The data is saved in a comma-separated text (CSV) file.
When you select the command, the system responds by displaying a dialog box so you may select where you want to put the text file and what you want to call the file. After supplying this information and then clicking **OK**, the system saves the data in the external text file.

Work with Attachments... – In some windows of the system you may want to include additional information with a record. This information may be a graphic file or a text file, and is termed an "attachment." The presence of one or more attachments is indicated in the Att. Column of the table you are viewing. If the background color for the cell in this column for the record is red, an attachment is present. You may double-click the red square to view thumbnail images of the attachments (or right-click the red square and then click **Work with Attachments** from the shortcut menu that is displayed). Once thumbnail images are displayed, you may double-click an image to display the attachment.

The Work with Attachments window is dynamic, which means that when you change rows in the underlying window, then the thumbnails in the Work with Attachments window also changes to be those of the underlying window's current row. Therefore, it is possible to have different attachments for each underlying window

The **Print** command displays the table data in a new window. Once the data is displayed in the new window, you may print it on a local printer.

Massive Update allows records to be updated across multiple fields, all within one window (shown below).



In order to select multiple records, highlight the first record in the group you wish to update, then holding down the Shift key select the last records in the range. Records can be selected across multiple pages.

A-6 How to Perform Basic Configurations

The OMS contains a very large amount of information. This is due to the need for the system to cover all aspects of your statewide agency. However, much of this information is not needed to perform your daily tasks – and, in fact, can actually make your work less efficient because you must sort through a lot of information to find just what you need.

The system provides several features to ease this difficulty and make your work more efficient:

- **Shortlists**

  Shortlists are simply lists of just those things (employees, equipment, and materials) that you use most frequently. By creating a shortened list, the creation of work orders is made easier and more efficient.

  For example, say you are creating a work order. Part of this process is selecting the equipment to be used, which is accomplished by selecting the desired equipment from a list. Now if you did not have a shortlist, this list would show all equipment used by your agency. This is most likely a very long list, and locating the desired equipment could take a long time. However, if you create a shortlist of just the equipment that your administrative unit regularly uses, the list will be considerably shorter -- and locating the desired piece of equipment will be much quicker and easier.

  Note that shortlists are specific to an administrative unit. Furthermore, when the system displays a resource list, it is the resource shortlist that is actually displayed. For example, the list of employees displayed in the Day Cards window shows only those employees in your employee shortlist – not all employees of your entire agency.

- **Crews**

  A crew is a group of employees from a single administrative unit who usually work together to perform an activity. This alone is very useful – but a crew also includes the equipment the crewmembers use. This dramatically increases the efficiency and speed of work order assignment.

  For example, without the Crews feature, you would need to assign each employee to the work order and then assign each piece of equipment to the work order. However, by using the Crews feature, you only need to assign the crew to the work order. This is much quicker and simpler.

- **Super Crews**

  The Super Crews feature carries the Crews concept to larger organizational units. While the Crews feature only allows you to form groups of employees and equipment within a single administrative unit, the Super Crews feature allows you to form crews that are composed of employees and equipment from multiple administrative units.

- **Resource Sharing**

  When you create a work order, you may only use the resources that belong to your administrative unit. However, if an activity required (for example) a piece of equipment that was not assigned to your administrative unit, you would need to go through the process of temporarily transferring that equipment to your unit so you could use it in a work order.

  This could be a time-consuming chore if you had to perform it often. The OMS therefore provides for resource sharing. This allows you to specify resources that may be shared amongst certain administrative units. This allows you to include the resources of another administrative unit in your shortlists, which removes the need for creating temporary transfers in the OMS in order to assign the resources to a work order.

- **Inventory Sharing**

  Inventory sharing is very much like resource sharing. In the OMS, you may only create work orders for road sections and features that your administrative unit is charged with maintaining. Yet, your administrative unit may regularly perform certain work activities on a road section or feature that is assigned to a different administrative unit. So, to create a work order, you would need to be able to assign the work order to a road section or feature belonging to another unit. This is accomplished by specifying the administrative units whose assets/features you can work on in the Share Inventory window.

A-7 How to Create Shortlists

The OMS supports three shortlists: employees, equipment, and materials. The shortlists for employees, equipment, and materials are created in similar ways. This section describes how to create these shortlists.

The Employee Shortlist

To create an employee shortlist, perform the following steps:

4. Navigate to the Labor Shortlist window (Roadway > Setup/Inventory > Short List > Labor Short List). This window contains a table that appears similar to the example shown below:

Labor Short List

1 Go 43 pages (632 rows)

Administrative Unit	Select	Employee Name	Employee status	Labor Class Code	Hours per day
2421 - Wendover		SHARP, JOHN	LBR Active	TRANSPORTATION ...	24
4332 - Hanksville		SELLERS, DALE	LBR Active	TRANSPORTATION ...	24
2427 - Salt Lake City ...		LIMBERIS, LARRY	LBR Active	ROADWAY OPERA...	24
4422 - Blanding		BLACK, GARY	LBR Active	ROADWAY OPERA...	24
3422 - Nephi		GARRETT, ROBERT	LBR Active	ROADWAY OPERA...	24
2422 - Grantsville		LAZENBY, SHANE	LBR Active	TRANSPORTATION ...	24
4422 - Blanding		LAWS, JAMES	LBR Active	ROADWAY OPERA...	24
2753 - R2 Crew 3		CRACROFT, PAUL	LBR Active	ENGINEERING TECH...	8
4411 - Region 4 Price...		ROGERS, ALLEN	LBR Active	ROADWAY OPERA...	24
4311 Region 4 Richfie...		HENRIE, LESLIE	LBR Active	ROADWAY OPERA...	24
4433 - Huntington		WINN, RICHARD	LBR Active	TRANSPORTATION ...	24
2448 - Special Crews		HARDCASTLE, NE...	LBR Active	TRANSPORTATION ...	24
4532 - Cove Fort		BRADSHAW, RA...	LBR Active	TRANSPORTATION ...	24
2432 - Murray		WILLIAMS, NORM...	LBR Active	TRANSPORTATION ...	24
4536 - Scipio		SORENSEN, UDELL	LBR Active	TRANSPORTATION ...	24

When you log onto you station, you may find that your shortlist has already been established. In this case, using the page navigation bar, scroll through the list and verify

Note that the information in this table is read-only. You cannot change any displayed information, nor can you add (or remove) an employee. This is because this information arrives from your human-resources system, and any changes need to be made in that system. This also means that if an employee is not shown in this table, you need to look to the human-resources system to see why (with the most common reason being that the OMS is not yet updated with the most current information from the human-resources system).

5. Look at the Select column in the table. A checkmark in the selection box indicates those employees that are on your employee shortlist.

6. Modify the list as needed by checking or clearing the selection boxes. To add an employee to your shortlist, click the selection box in the row with the employee's name. To remove an employee from your shortlist, click the checkmark shown in the selection box.

7. When all employees that you wish to appear in your employee shortlist have checkmarks in the selection boxes, click **Save** to store this information. (If the name of the employee is not

shown, you will need to navigate to the Resource Sharing window in the System module and include the employee's administrative unit as being available to your administrative unit. Then, when you return to this window, the employee will be available for selection.)

Employees are removed from the shortlist in a similar manner -- clear the check box and then click .

Note that the system does not check whether the employee is assigned to a crew before removing the employee from the shortlist. Thus you should ensure that the employee is not part of a crew before removing him or her from the shortlist or unexpected results may occur when assigning crews to work orders (that is, the people you thought were assigned to the work order may not actually be those assigned). You will learn about Crews later in this section.

The Equipment Shortlist

Your equipment shortlist is created just like your employee shortlist, as described in the following steps:

8. Navigate to the Equipment Shortlist window (Roadway > Setup/Inventory > Short List > Equipment Short List). This window contains a table that appears similar to the example shown below:

Equipment Short List

1 Go > >> 20 pages (291 rows)

Select	Equipment name	Administrative Unit	SHOP Assigned	Assigned Admin Unit	Asset Status	Equip Class Code
	33372	1424 - Clearfield	UDOT	UDOT	ACTIVE - IN S...	VARIABLE MESSAGE BOARD
	33373	1422 - Ogden	UDOT	UDOT	ACTIVE - IN S...	VARIABLE MESSAGE BOARD
	19062	1751 - South Willard	UDOT	UDOT	ACTIVE - IN S...	PICKUP 1/2-T REG CAB
	19090	1752 - Wellsville	UDOT	UDOT	ACTIVE - IN S...	PICKUP 1/2-T REG CAB
	03036	1425 - Huntsville	UDOT	UDOT	ACTIVE - IN S...	SNOWPLOW/STRAIGHT BLADE
	19480	1752 - Wellsville	UDOT	UDOT	ACTIVE - IN S...	PICKUP 1/2-T REG CAB
	19042	1751 - South Willard	UDOT	UDOT	ACTIVE - IN S...	PICKUP 1/2-T REG CAB
	02430	1426 - Morgan	UDOT	UDOT	ACTIVE - IN S...	TRUCK 1 TON DUAL WHL CC
	19417	1424 - Clearfield	UDOT	UDOT	ACTIVE - IN S...	PICKUP 3/4-T REG CAB
	03798	1426 - Morgan	UDOT	UDOT	ACTIVE - IN S...	SNOWPLOW/TRUCK WING
	03829	1424 - Clearfield	UDOT	UDOT	ACTIVE - IN S...	SNOWPLOW/TRUCK WING
	03266	1427 - Centerville	UDOT	UDOT	ACTIVE - IN S...	SNOWPLOW/TRUCK WING
	13728	1422 - Ogden	UDOT	UDOT	ACTIVE - IN S...	SPREADER/HYDRAULIC DRIVE/7.5YD
	02090	1424 - Clearfield	UDOT	UDOT	ACTIVE - IN S...	LEASE TRK/1-TON/DUAL WHL/4X4
	03075	1422 - Ogden	UDOT	UDOT	ACTIVE - IN S...	SNOWPLOW/TRUCK WING

Note that the information in this table is read-only. You cannot change any displayed information, nor can you add (or remove) equipment. If you cannot locate a piece of equipment, contact your System Administrator for assistance.

9. Look at the Select column in the table. A checkmark in the selection box indicates the equipment that is on your equipment shortlist.

   Tip: To make it easier to see what equipment is selected, double-click the word Select — and then double-click again. The first double-click sorts the equipment so that the equipment in your shortlist falls last in the table; the second double-click sorts the table so that the equipment on your shortlist is listed first in the table. This may help you to see just what equipment is selected for your equipment shortlist.

10. Modify the list as needed by checking or clearing the selection boxes. To add a piece of equipment to your shortlist, click the selection box in the row showing the equipment. To remove a piece of equipment from your shortlist, click the checkmark shown in the selection box.

11. When each piece of equipment that you wish to appear in your shortlist has a checkmark in the selection box, click **Save** to store this information.

The Material Shortlist

Like the previous two shortlists, you create the material shortlist by selecting or clearing checkboxes in the Material Shortlist window as described in the following steps:

1. Navigate to the Material Shortlist window (Roadway > Setup/Inventory > Short List > Material Short List). This window contains a table that appears similar to the example shown below (note that the information in this table is read-only).

Material Short List

1 Go 5 pages (73 rows)

Administrative Unit	Select	Warehouse Code	Mat. Class Code	Material Master Code	Current Amount	Full Capacity	Unit Cost ($)
1421 - Clinton		CLINTON	060 - Automotive ...	06003110555 - ANTIFREEZE RADIATOR DIESEL (GAL - ...	4		5.425
1421 - Clinton		CLINTON	075 - Automotive ...	07566457789 - ANTIFREEZE WINDSHIELD PREMIX (GAL ...	1		1.16
1421 - Clinton		CLINTON	405 - Fuel, oil, gre...	40524620495 - CHASSIS LUBE GREASE 14 OZ TUBE (E...	0		1.37
1421 - Clinton		CLINTON	405 - Fuel, oil, gre...	40536214956 - OIL BULK TYPE D DEXRON (QT - Quart)	64		1.2153
1421 - Clinton		CLINTON	405 - Fuel, oil, gre...	40539543807 - OIL BULK ALL FLEET 15-40W (QT - Quart)	120		0.9212
1421 - Clinton		CLINTON	405 - Fuel, oil, gre...	40551350103 - OIL BULK HYDRAULIC SPECIAL (QT - Qu...	0		0.85
1421 - Clinton		CLINTON	540 - Lumber and ...	54073261205 - POST DOUG FIR TREATED 4X4X12' (EA -...	11		17.9309
1421 - Clinton		CLINTON	540 - Lumber and ...	54073261304 - POST DOUG FIR TREATED 4X4X14' (EA -...	7		22.2
1421 - Clinton		CLINTON	540 - Lumber and ...	54073261403 - POST DOUG FIR TREATED 4X6X16' (EA -...	2		33.08
1421 - Clinton		CLINTON	550 - Markers, pla...	55008000288 - DEL MED CRYST STRAIGHT (EA - EACH)	18		1.3906
1421 - Clinton		CLINTON	550 - Markers, pla...	55008333407 - DEL MED CRYST SINGLE8X3X3.5 (EA - E...	73		1.5218
1421 - Clinton		CLINTON	550 - Markers, pla...	55034000268 - MARKER-CULVERT BR BLACK W/REFL (...	90		1.0881
1421 - Clinton		CLINTON	550 - Markers, pla...	55034000270 - MARKER MAINT. ORANGE REF TAPE (EA...	28		0.7
1421 - Clinton		CLINTON	665 - Plastics, resi...	66524172195 - LITTER PICK UP22X16X60-50 (BOX - Box)	0		23.91
1421 - Clinton		CLINTON	675 - Poisons: agr...	67555777506 - HERBICIDE LOW DRIFT AGENT (QT - Quart)	98		3.2391

2. Look at the Select column in the table. A checkmark in the selection box indicates those materials that are on your material shortlist.

   Tip: To make it easier to see what materials are selected, double-click the word Select – and then double-click again. The first double-click sorts the rows so that the materials in your shortlist fall last in the table; the second double-click sorts the table so that the materials on your shortlist are listed first in the table. This may help you to see just what materials are selected for your materials shortlist.

3. Modify the list as needed by checking or clearing the selection boxes. To add a material to your shortlist, click the selection box in the row showing the material. To remove a material from your shortlist, click the checkmark shown in the selection box.

   Note: When completing a Work Order, if you select a material that has an inventory level less than the quantity you are using in the work order, you will receive an error message. when you try to place those items in your work order. You will learn about Work Orders in a later Module.

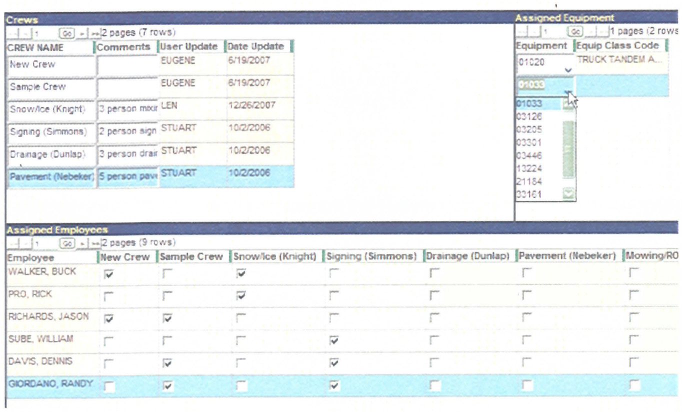
4. When all materials that you wish to appear in your shortlist have checkmarks in the selection boxes, click **Save** to store this information.

A-8 How to Create a Crew

Crews are a highly useful feature of WMS. Since they are composed of both employees and equipment, they allow you to quickly assign resources to a work order. To create a crew:

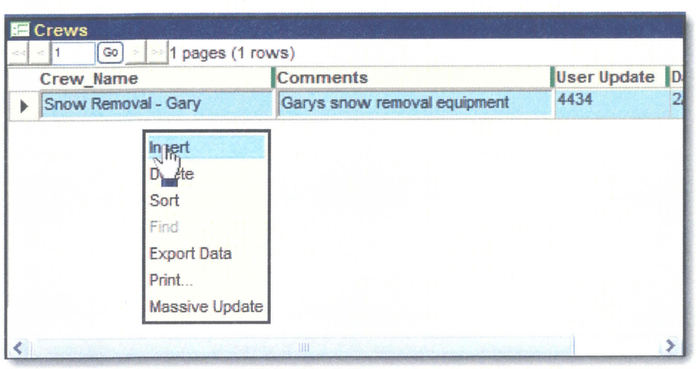
1. Navigate to the Crews window (Roadway > Setup/Inventory > Short Lists > Crews). The window will display a table similar to the following:

   Note: Because you are logged into a different station, your information may be different than that shown. In setting up your crew, use the information given from your station.



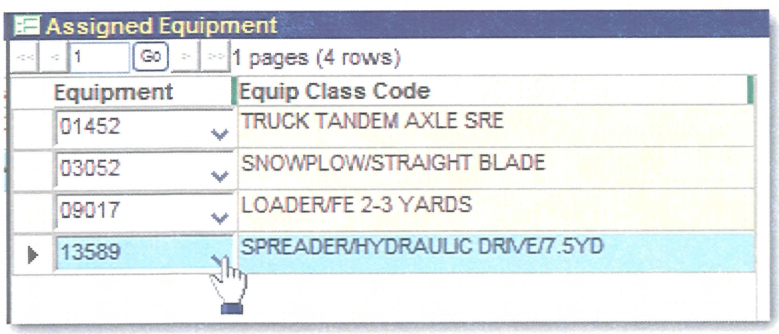
   The upper left pane of this window shows the crews for your administrative unit, and the upper right pane shows the equipment assigned to the crew selected in the left pane. The lower part of the window lists all employees in your shortlist and indicates to which crew(s) each employee is assigned. (Each column is a crew, with the header for the column being the name shown in the upper left pane. A checkmark indicates that an employee is assigned to the crew.)

2. In the upper left pane, point to the table, right-click, and then click **Insert** from the shortcut menu. A new row is added to the table.



3. In the new row, double-click the displayed text in the Crew Name column. A dialog box will appear where you can edit the name of the crew. Select OK to close the dialog box. The new Crew Name will appear in the upper left pane.

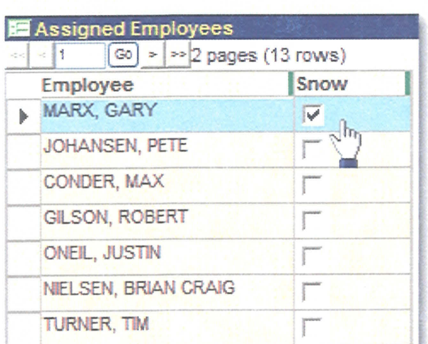
4. Tab to the Comments column and type any additional information that you would like to include.
5. Point to the upper right pane (Equipment), right-click, and then click **Insert**. A row is added to the table, with a drop-down list in the Equipment column.
6. Click the arrow for the drop-down list. The list of equipment is displayed.
7. Locate the equipment to be associated with the crew and then click the name of the equipment.
8. Repeat steps 5 – 7 for any additional equipment that is to be associated with the crew.



9. In the lower pane (Employees), locate the first employee who is a member of the new crew.

Tip: If the employees name does not appear in the list, they may be located on a different page. Use the page navigation bar to find the employee.

10. In the row showing the desired employee, click the checkbox in the column headed by the name of the new crew. A checkmark appears in the checkbox.



11. Repeat steps 9 and 10 for the remaining members of the crew.
12. Click **Save** to store the new information.

Maintaining a crew is performed similarly. You first select the crew to be modified in the upper left pane. You may then add equipment (via **Insert**) or delete equipment (via **Delete**) —and/or remove crewmembers (by clicking a checked checkbox to clear it) or add crewmembers (by clicking an unchecked checkbox to select it).

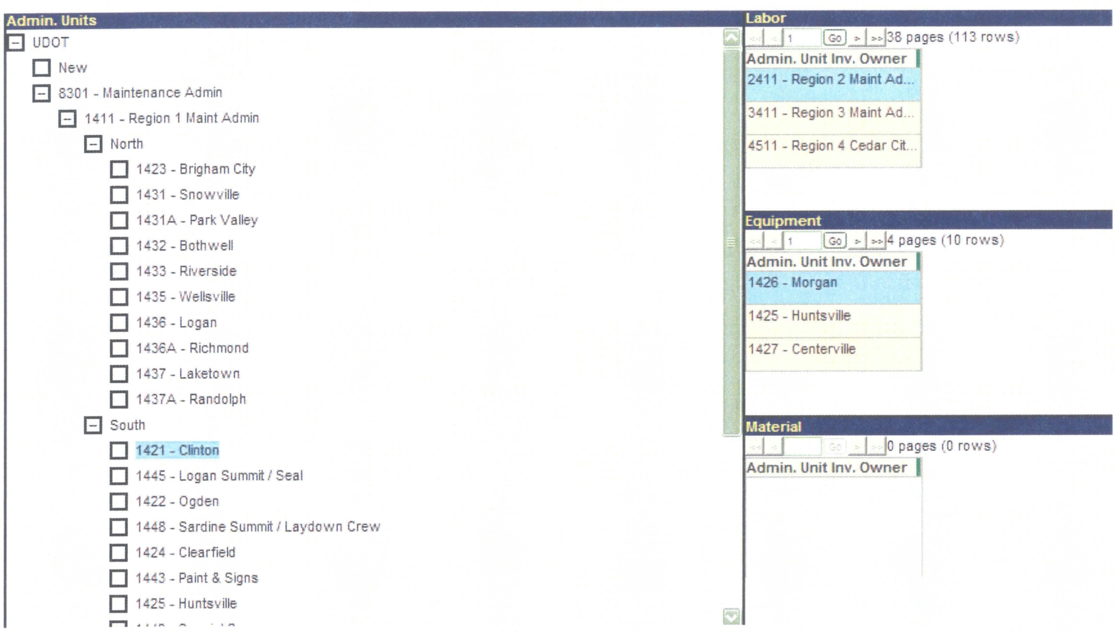
A-9 How to Share Resources

In the OMS, you may only create work orders using the resources (labor, equipment, and material) that are assigned to your administrative unit. Generally, this works fine. Yet, situations may arise where you need to use resources assigned to another administrative unit. When these situations occur more than a once in a while, it is best to share resources (one or multiple) between administrative units. This allows you to include the other administrative unit's resource in one of your shortlists, which in turn allows you to use its resource in your work orders.

Note that resource sharing only occurs in one direction. That is, if administrative unit A is allowed to share the resources of administrative unit B — administrative unit B is not automatically allowed to share the resources of administrative unit A. To allow two-way sharing of resources, each unit must be configured to share resources with the other.

Labor, equipment and materials can be shared between administrative units. To share labor, equipment and materials between administrative units, perform the following steps:

1. Navigate to the Resource Sharing window (System > Setup > Resource Sharing). (Note that due to security restrictions, the average user may not be able to access this window. Instead, the System Administrator will need to enable any resource sharing.) An example of this window is shown below:

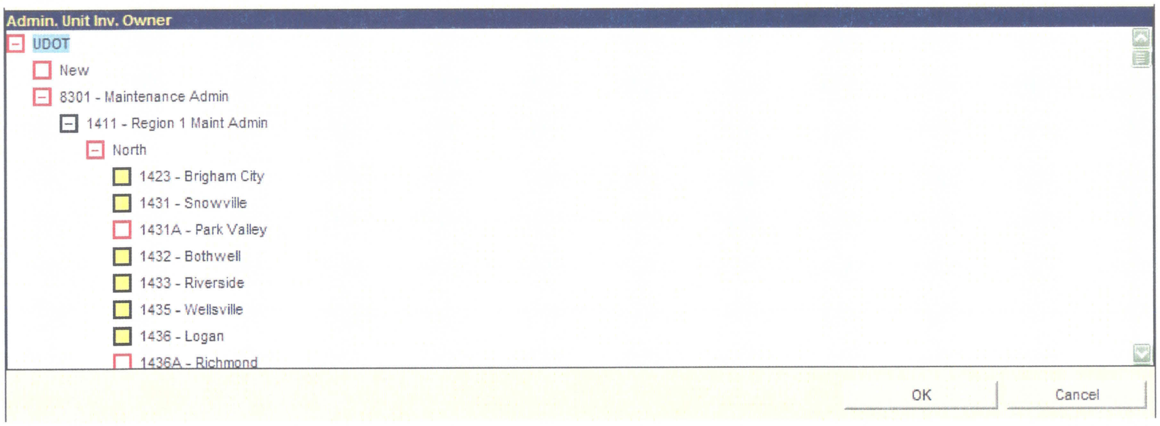


2. Expand the hierarchy for the selected administrative unit by clicking the plus sign. The system displays all of the sub units.

3. Click the administrative unit for which resource sharing is to be setup (this is typically your current administrative unit).

4. In the Labor pane on the right side, place the cursor on the pane, right-click, and then click **Edit Selection** from the shortcut menu that is displayed. This displays a dialog box from which you may select the administrative unit(s) who will share the resources.

5. A dialog box similar to the one shown below will appear. You can expand the hierarchy of an administrative unit by clicking the plus sign.



6. Point to an administrative unit whose resources you would like to share, right-click, and then click **Select This** (or click in the box next to the administrative unit). A yellow box appears beside the name to denote that it is selected (note that only administrative units with a black box next to them can be selected. The administrative units with a red box next to them cannot be selected since they do not have any of the current resource assigned to them).
7. Click **OK**. The dialog box closes and the selected administrative unit appears in the Labor pane.
8. Place the cursor in the Equipment pane and repeat steps 4 – 7 to share equipment resources.
9. Place the cursor in the Material pane and repeat steps 4 – 7 to share material resources.
10. Click **Save** to store the information.

The administrative unit selected in the pane on the left may now share the labor, equipment and materials of the administrative units selected in the three panes on the right in its work orders (once these resources are then included in that administrative unit's shortlists).

Note that if you would like to enable two-way resource sharing between two or more administrative units so that they can use the labor, equipment and material resources of each other, repeat steps 3 through 9 – selecting each in these administrative units in turn (in the pane to the left). Once these steps are performed to set each of these up individually, these units may then share resources with each other.

A-10 How to Share Inventory

"Inventory" in the Roadway module refers to road sections and other feature inventory. Each administrative unit is assigned particular road sections and other features that they are charged with maintaining. When a work order is created, it may only specify an activity to be performed on a feature belonging to the administrative unit. In other words, an administrative unit may only work on road sections and features in its inventory.

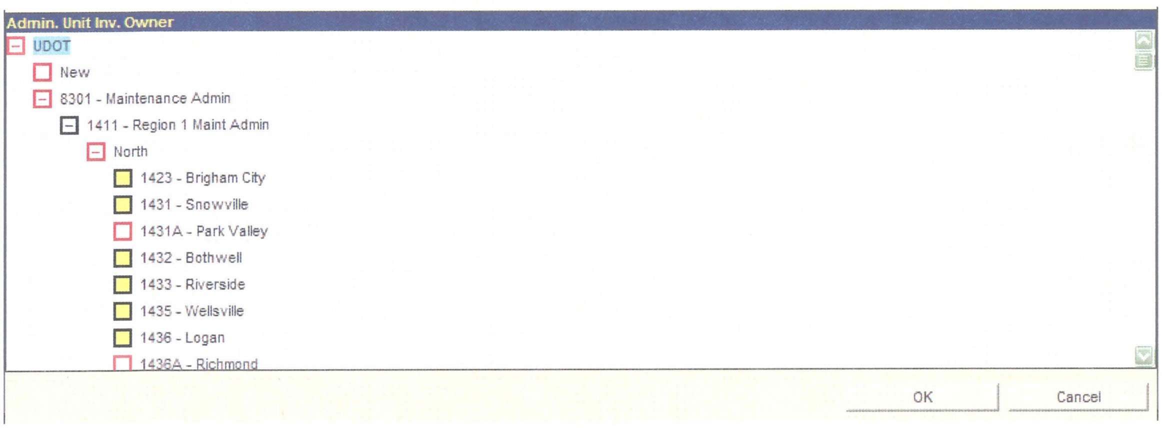
However, in some cases, an administrative unit needs to work on a road section or other feature that is not part of its inventory. For example, say you are in Station 1421. You maintain shoulders along 0039P to the Station Boundary. At the boundary, the "ownership" of 0039P passes to the Station 1422, since it is inefficient to just stop at the boundary line (it would be better if your unit could perform shoulder maintenance along the entire length of 0039P), you need to share road sections / features with Station 1422. This would allow you to include Station 1422's part of 0039P in work orders created by your administrative unit.

Note that inventory sharing only occurs in one direction, That is, if administrative unit A is allowed to work on road sections "owned" by administrative unit B — administrative unit B is not automatically allowed to work on road sections "owned" by administrative unit A. To allow two-way sharing of road sections, each unit must be configured to share inventory with the other. Also note that you can only setup inventory sharing for the administrative unit you are currently logged in as.

The following steps show how to share the road sections of one administrative unit with another:

1. Navigate to the Share Inventory window (Roadway > Setup/Inventory> Short List > Share Inventory). Initially, this window is blank (that is, no information is shown in the table).

2. Point to the window, right-click, and click **Edit Selection** from the shortcut menu. This command displays a dialog box that you use to select the administrative unit(s) whose road sections you will be allowed to use. An example of the dialog box is shown below:



3. Locate the administrative unit by clicking the plus sign to expand the hierarchy.

4. Point to the desired administrative unit, right-click, and then click **Select This** (or click in the box next to the administrative unit) from the shortcut menu that is displayed. The white square will change to yellow to denote that it is selected.

5. Click **OK**. The dialog box closes and the selected administrative unit is shown in the Share Inventory window.

6. Click **Save** to complete the procedure. Your administrative unit may now use the road sections of the selected administrative unit(s) in work orders.

Once sharing between administrative units is established, you maintain it in the same way. You use the **Edit Selection** command to display the dialog box, right-click the desired administrative unit, and then click the appropriate selection command (**Select All**, **Select Visible Items**, **Select Branches**, or **Select This** [or click in the box next to the administrative unit]) – or the de-selection versions of each of these – to modify what is selected.