Transportation Mobility and Safety Division
North Carolina Department of Transportation

Standards for the Work Management System
August 6, 2009

The following are standards to be used by all Transportation Mobility and Safety Division (TMSD) employees when using the SAP Work Management System (WMS). All other work flow/work management standards necessary for reporting purposes (metrics, PDAs, budget, etc.) but not listed below will be the responsibility of the individual business units and their supervisors.

    I.   Naming Conventions

    II.   Time Charges

    III.   Funding Sources (Billing Charges) for Orders

    IV.   Standing Orders

    V.   Variants

    VI.   Customers

    VII.   Administrators

I.   Naming Conventions

A.   Notifications and Orders

Each notification/order name has a maximum of 40 characters. The first four characters shall always be either 2000 or 3000, depending on the funding source for the order. All orders without a funding source that settle to variance (i.e. directly to the cost center) shall begin with 2000. All orders with a funding source (1DOT or other WBS element) shall begin with 3000. The only exception will be orders that are set up as templates (see below).

All names shall be location specific wherever possible. County and Division names/numbers shall not be listed in the "Description" field. Local street/road names shall only be included in the "Description" field if they do not coincide with a State Highway System (SHS) route.

It shall be the responsibility of supervisors to ensure orders established by their personnel follow the standard naming convention.

B.   Intersections

The highest order route shall always be listed first and the "@" symbol shall be used between the highest order route and the lower order route(s). Some examples are as follows:

> 3000 I 40 @ I 95
> 2000 US 401 @ NC 55
> 3000 US 401 @ Lockheed

C.   Sections (Strips/Segments)

The on road shall be listed first. The words "from" and "to" shall be used for sections, with the highest order reference route being placed between "from" and "to", and the lower order reference route being placed after "to". Lower order coinciding routes shall only be included if room allows. Some examples are as follows:

> 2000 US 401 from NC 55 to SR 1010
> 3000 I 40 from US 64 to Durham County

D.   Templates

Since time charges can not be applied to templates, they shall be set up with the first eight characters stating "TEMPLATE" followed by the name of the template. Some examples are as follows:

> TEMPLATE STAA Reasonable Access
> TEMPLATE STAA Designation

E.   Division-wide and Statewide Orders

Division-wide and statewide orders shall have the name of the work or project in the "Description" field. Some examples are as follows:

2000 Median Cable Guardrail Study
3000 Median Cable Guardrail Study
3000 Memorial Day Crashes 2001-2008

II.   Time Charges

Employees in cost center 150149 (administrative cost center) shall only charge time against orders beginning with 2000. Employees in cost centers 151105, 151106, 151107, 151108, 151109, and 151110 shall only charge time against orders beginning with 3000. It shall be the responsibility of supervisors to ensure time is charged correctly. In compliance with NCDOT policies, variance (charging directly to a cost center) is no longer allowed for 3000 series employees.

## III.   Funding Sources (Billing Charges) for Orders

All orders shall be set up with appropriate funding sources prior to being released for receiving time charges. It shall be the responsibility of supervisors to ensure orders established by their personnel have correct funding sources.

A.   *Orders for 2000 Series Employees*

All orders established for 2000 series employees (cost center 150149) shall have an account assignment (Location Tab) to cost center 150149…
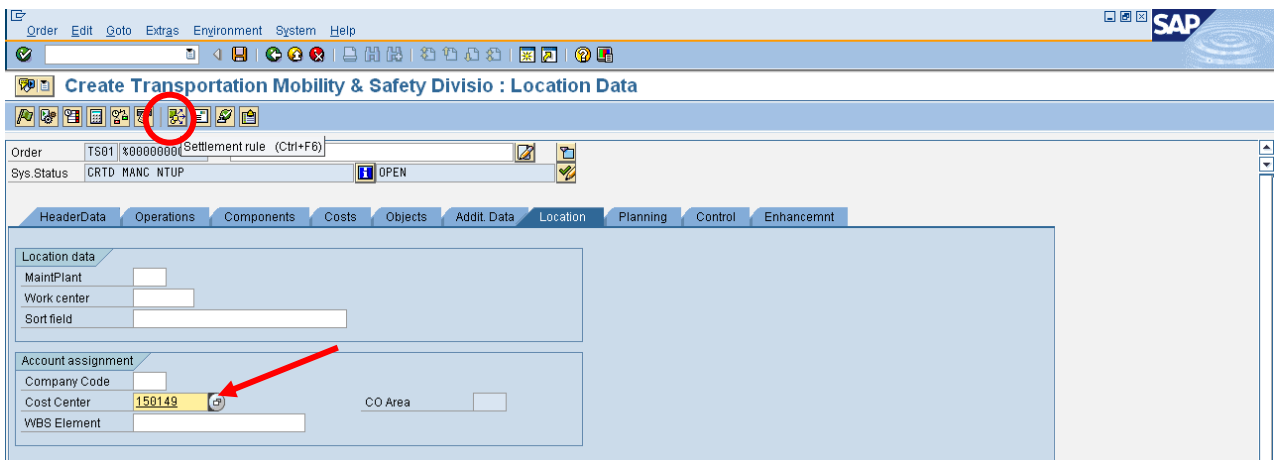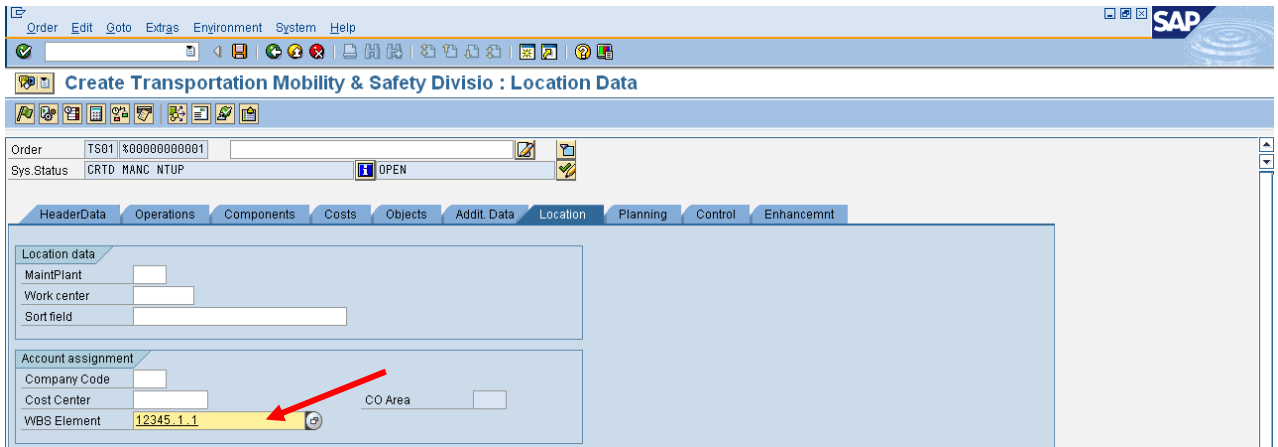

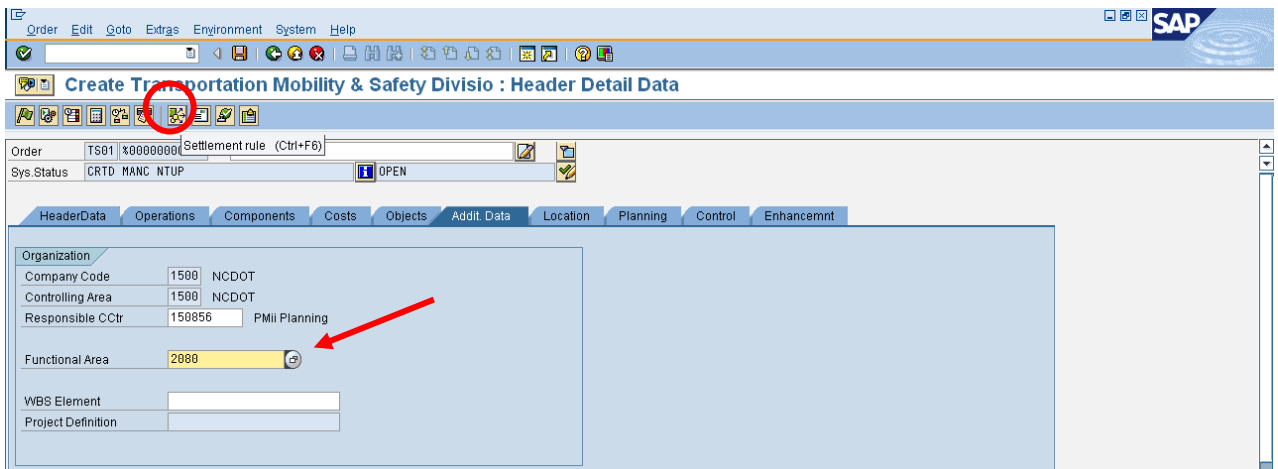and shall have 100% full settlement to cost center 150149…
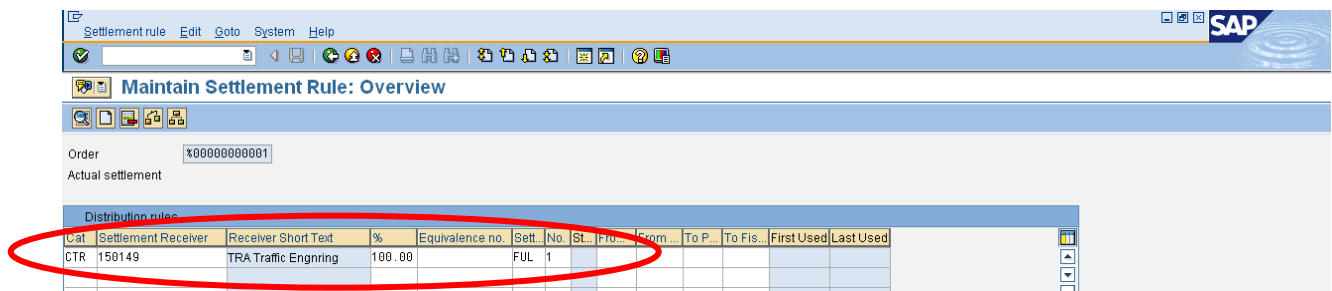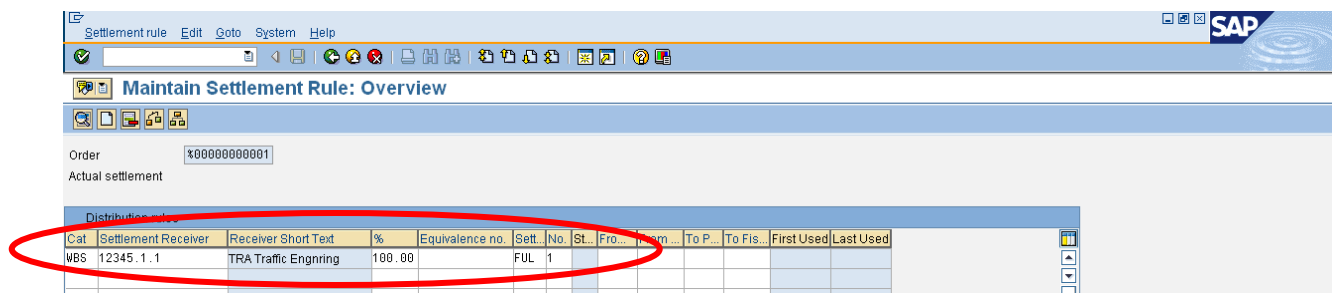
B. *Orders for 3000 Series Employees*

All orders established for 3000 series employees (cost centers 151105, 151106, 151107, 151108, 151109, and 151110) shall have an account assignment (Location Tab) to a WBS element…

an organization assignment (Additional Data tab) to a functional area…

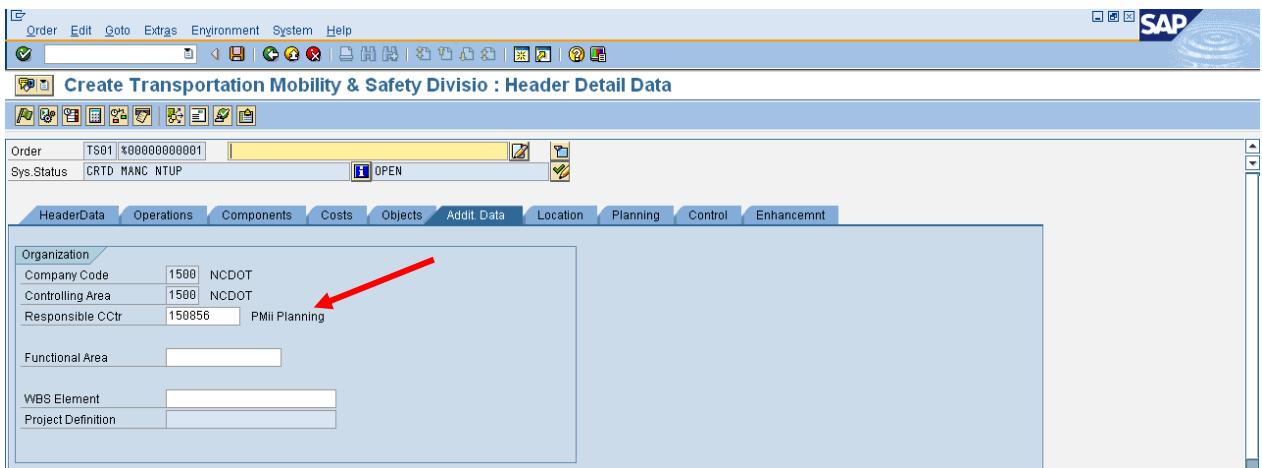and shall have 100% full settlement to the WBS element…

C.   *All Orders – Responsible Cost Center*

All orders shall have a "Responsible Cost Center" (Additional Data tab) of 150856 (PMii Planning) for the purpose of calculating planned costs.

IV.   Standing Orders

A standing order is an order set up for continuous time charges. All standing orders for administrative work and training have already been established in the system. See the appropriate section (below) for administrative and training standard orders specific to 2000/3000 series employees and cost centers (individual Units). It shall be the responsibility of supervisors to ensure employees charge their administrative and training activities correctly.

A.   Cost Center 150149

All employees in cost center 150149 are 2000 series (administrative) employees. These employees are not specific to any one Unit but may be found in multiple Units. These employees are to use the following standing orders for administrative and training time charges…

2000 TMSD Administration
2000 TMSD Training – Human Resources
2000 TMSD Training – Leadership
2000 TMSD Training – Safety
2000 TMSD Training – Technical

B.   Cost Center 151105

All employees in cost center 151105 (Traffic Safety Unit) are 3000 series (project) employees and use WBS element 1DOT.1.3.1 for administration and training charges. These employees are to use the following standing orders to charge time to administrative and training activities…

3000 TSU Administration
3000 TSU Training – Human Resources
3000 TSU Training – Leadership
3000 TSU Training – Safety
3000 TSU Training – Technical

C.   Cost Center 151106

All employees in cost center 151106 (Traffic Management Unit) are 3000 series (project) employees and use WBS element 1DOT.1.3.2 for administration and training charges. These employees are to use the following standing orders to charge time to administrative and training activities…

3000 TMU Administration
3000 TMU Training – Human Resources
3000 TMU Training – Leadership
3000 TMU Training – Safety
3000 TMU Training – Technical

D.   *Cost Center 151107*

All employees in cost center 151107 (Signing and Delineation) are 3000 series (project) employees and use WBS element 1DOT.1.3.3 for administration and training charges. These employees are to use the following standing orders to charge time to administrative and training activities…

3000 SDU Administration
3000 SDU Training – Human Resources
3000 SDU Training – Leadership
3000 SDU Training – Safety
3000 SDU Training – Technical

E.   *Cost Center 151108*

All employees in cost center 151108 (Traffic Systems Operations Unit) are 3000 series (project) employees and use WBS element 1DOT.1.3.4 for administration and training charges. These employees are to use the following standing orders to charge time to administrative and training activities…

3000 TSOU Administration
3000 TSOU Training – Human Resources
3000 TSOU Training – Leadership
3000 TSOU Training – Safety
3000 TSOU Training – Technical

F.   *Cost Center 151109*

All employees in cost center 151109 (ITS and Signals Unit) are 3000 series (project) employees and use WBS element 1DOT.1.3.5 for administration and training charges. These employees are to use the following standing orders to charge time to administrative and training activities…

3000 ITSSU Administration
3000 ITSSU Training – Human Resources
3000 ITSSU Training – Leadership
3000 ITSSU Training – Safety
3000 ITSSU Training – Technical

G. *Cost Center 151110*

All employees in cost center 151110 (Oversize/Overweight Permits Unit) are 3000 series (project) employees. This cost center is a pay direct (receipt based) and uses WBS element 36086 for all work charges (including administration and training). These employees are to use the following standing orders to charge time to administrative and training activities…

3000 OSOW Administration
3000 OSOW Training – Human Resources
3000 OSOW Training – Leadership
3000 OSOW Training – Safety
3000 OSOW Training – Technical

V.   Variants

All variants shall start with "TMSD" and should follow the STaRS standard naming conventions for variants wherever possible.

VI.   Customers

Permanent customers ("Partners") are established in the system so they may be used repeatedly in notifications. One-time customers ("Citizens") are added to the system each time they are used, but are not usually repeat customers. Permanent customers may only be established by administrators, but any user can add a one-time customer to a notification. It shall be the responsibility of supervisors to ensure their employees follow the above conventions when adding information for one-time partners.

A. *Permanent Customers (Partners)*

When entering the information for a permanent customer, the "Address" tab is generally only used for organization information. Therefore, the following is not needed on the "Address" tab information: title, telephone number (unless it is a switchboard number – no direct lines), mobile phone number, email address (unless it is a centralized company email such as "Contact Us"), or standard communication method.

The information contained on the "Contact" tab is specific to each individual, and the following data entry conventions shall be followed…

Title

First Name: include the middle initial or middle name on this line

Phone number digits separated by dashes (no spaces, no parentheses)

B.   One-Time Customers (Citizens)

When entering the information for a one-time customer (citizen), the following data entry conventions shall be followed…

Title

Name
Line 1: Full Name
Line 2: Position (if applicable)
Line 3: Company or organization (if applicable)

Search Item 2: Company Name (if applicable)

Phone number digits separated by dashes (no spaces, no parentheses)

VII.   Administrators

A system administrator has the ability to add and/or edit permanent customers ("Partners") and to edit information in work centers (add new employees, relationship periods, etc.). Each Unit has at least one system administrator, and those individuals are as follows…

Administration	Libby Allen
	Babita Savitsky
	Ramona Atchley
ITS and Signals	Tereca Batts
Oversize/Overweight Permits	Joy Wiggins
Signing and Delineation	Ron King
Traffic Management Unit	Jessica Kuse
	BenJetta Johnson
Traffic Safety Unit	Jeff Jaeger
	Judy Hart
Traffic Systems Operations	Charlene Phillips