#### TMSD Work Management System Advanced Order Options Quick Card

#### A. Templates

Note – A template is used to insert operation information into new orders. Templates are generally only established for order types that have complicated operation structures such as work hours, durations, and relationships. Templates do not need cost centers, WBS elements, function codes, settlement rules, or to be released. Time can not be charged to templates.

1. To create a template, set up an order and enter information in the "Operations" tab as necessary. Save the order and request that an Administrator convert it to a template.

Order	TS01 4100	0000135	TEMPL	ATE	Funded Division Projects								
Sys.Status	CRTD MANC	NMAT PRO	)		TEMP 💅	2							
Heade	rData Ope	erations	Compon	ents	Costs Objects Addit. Data Loca	tion	Planning	Cont	rol Enhanc	emnt			
OpAc S	Op Work ctr	Plant Co	StTextK	S.,	Operation short text	LT	Work Un	N	Durat Un	CcKey	ActTyp	Recipient	JE
0010	327000	1595 TS	91		Prepare Scoping Cost Estimate		2 4.0H		6.0H		🛅 PMII		Ŀ
0020	327000	1595 TS	91		Project Scoping Meeting				12.0H		🛅 PMII		E
0030	327000	1595 TS	91		Prepare Preliminary Signing Location		2 120.0H		23.0D		PMII		1
0040	327000	1595 TS	91		SDU Coordination with Division		24.0H		36.0H		PMII		1
0050	327000	1595 TS	91		Detour Signing		2 80.0 H		15.0D		PMII		1
0060	327000	1595 TS	91		Constructibility Review		2 8.0 H		12.0H		🛅 PMII		1
0070	327000	1595 TS	91	-	Conduct Field Inspection Meeting		2 8.0H		12.0H		PMII		1
0080	327000	1595 TS	91	-	Coordinate Barrier Control		2 16.0 H		3.0D		T PMII		1
0090	327000	1595 TS	91	-	Coordinate Overhead Sign Structures		2 56.0 H		84.0H		PMII		1
0100	327000	1595 TS	91	1	Detour, Temporary Signs and Lane Control		2 16.0 H		3.0D		PMII		1
0110	327000	1595 TS	91	-	Develop Signing and Delineation Plans		400.0H		76.0D		PMII		1
0120	327000	1595 TS	91	1	Finalize Quantities and Estimate		40.0H		60.0H		PMII		1
0130	327000	1595 TS	91	-	Check List of Standards and Provisions		8.0H		12.0H		PMII		1
		1		-		620		_			_		1

 To use a template, open transaction IW31. Enter the order type, priority, and functional location (as usual). Enter the template's order number in the "Order" field of the "Reference" box and press "Enter" (or click the "Header" button). This will copy all of the information from the "Operations" tab in the template to the "Operations" tab in the new order.

Header data	0		
Order Type Priority Func. Loc. Ping plant	TS81 Normal I NC-DIV85-834 1595	Franklin	
Reference	41000000135 👩		

3. Complete, settle, release, and save the rest of the order as normal.

# TMSD Work Management System Advanced Order Options Quick Card (continued)

### **B. Relationships**

Note – Relationships are only used on operations where durations are present. A relationship compares two or more operations (not necessarily within the same order) and provides required sequencing for them such as having the operations start at the same time (SS), finish at the same time (FF), start when one finishes (SF), or finish when one starts (FS). Relationships can be established when creating an order (IW31), when changing an order (IW32, IW37, or IW38), or can be imported when using a template.

- HeaderData Operations Components Costs Objects Addit. Data Location Planning Control Enhancemnt OpAc SOp Work ctr Plant Co... StTextK S.. Operation short text LT Work Un N... Durat Un CcKey ActTyp Recipient FTT 0010 327000 1595 TS01 Prepare Scoping Cost Estimate 4.0H 6.0H PMII ▲ ▼ 0020 327000 1595 TS01 8.0H 12.0<mark>H</mark> T PMII Project Scoping Meeting 0030 1595 TS01 120.0H 🛅 PMII 327000 Prepare Preliminary Signing Location 23.0D 0040 327000 1595 TS01 24.0H 36.0H PMII SDU Coordination with Division 0050 327000 1595 TS01 80.0H 15.0D PMII Detour Signing 0060 327000 1595 TS01 8.0H Constructibility Review 12.0H PMII Conduct Field Inspection Meeting 0070 327000 1595 TS81 8.0H 12.0H PMII 327000 0080 1595 TS01 16.0H 3.0D PMII Coordinate Barrier Control 0090 327000 1595 TS01 Coordinate Overhead Sign Structures 56.0H 84.0H PMII 0100 327000 1595 TS01 16.0H 3.0D 🛅 PMII Detour, Temporary Signs and Lane Control 0110 327000 1595 TS01 Develop Signing and Delineation Plans 400.0H 76.0D PMII 0120 327000 1595 TS01 Finalize Quantities and Estimate 40.0H 60.0H 🛅 PMII 327000 0130 1595 TS01 Chack Liet of Standarde and Provision 8 0 H 12 BH PMTT •• Dates Act. Data Enhancement 🖧 🚹 🚘 Ex. Factor 📑 Catalog General Internal External
- 1. To create a relationship, highlight an operation and click the "Internal" button

2. Click on the "Relationships" tab (in the bottom half of the screen) and enter the operation number, order number, and relationship that should be associated with the operation you selected in step one (above).

Order		4100000	0135 Oper./A	kot. [	0020 /	Ctrl key	[	TS01	
StdTextKey/ShrtText Project Scoping Meeting									
General Internal External Dates Act. Data Enhancemen									
Work ctr	<u>327000</u>	/ 1595	Ctrl key	TS01	Acty Type	<u>PMII</u>	Calc		1
Work	8.0	Н			Norm. dur.	12.0	Н	Pct	
Person, no					Int. distr			No.TimeTickets	
Qualifications	5 /				Wage data /	/			
Requirements profile (LO)									
O Job									
O Position									
Onumental Description Description									
Compone	Components Regmnts Assignment Relationships								
Compone			0	. Or	der	Operation s	short te	ext	
	et to finsh	Un. Tv.	ISuccessoring						
	set to finsh	Un. Ty. FS	Successor ind	41	000000135	Prepare Sc	oping	Cost Estimate	
OpAc Offs 0010				41	000000135	Prepare Sc	oping	Cost Estimate	
OpAc Offs		FS		41	000000135	Prepare Sc	oping	Cost Estimate	

This example reads as follows...

"Operation 0010 of order 4100000135 must finish before operation 0020 of order 4100000135 can start."

(i.e. this is a "FS" relationship)

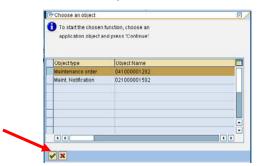
3. When the order is saved, or when the scheduling button (1) is clicked, forecast completion dates (Earliest End Date) of the operations will be recalculated based on the basic start date, and the relationships and the durations of the associated operations.

## TMSD Work Management System Advanced Order Options Quick Card (continued)

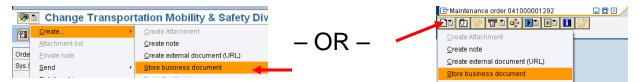
#### C. Attaching Documents

Note – The only documents that can be attached to orders are Adobe files (PDF), Word files (DOC), and Excel spreadsheets (XLS).

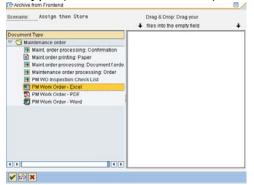
- 1. Open transaction IW32.
- 2. Click the "Services for Object" button ( 💯 📋 ).
- 3. Select the "Maintenance order" line and press "Enter" or click on "Continue" (green check).



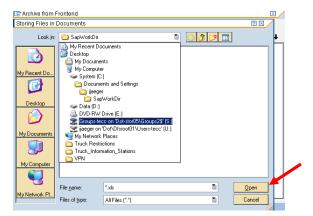
4. Select "Create..." -> "Store business document"



5. Double-click on the document type (Excel, PDF, or Word).

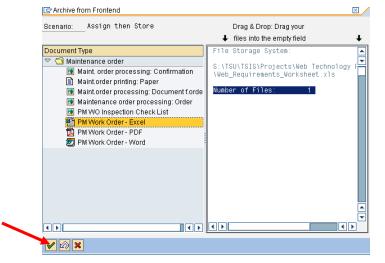


6. Find the file to be attached and double-click on it (or select the file and click "Open").



## TMSD Work Management System Advanced Order Options Quick Card (continued)

7. Click the "Continue" button (green check).



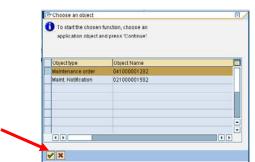
8. If open, close the "Maintenance Order" window.

🖙 Maintenance order 041000001292	
Di 🗘 🦻 🖫 🖒 🖬 🖬 🛛	

9. Click the "Save" button ( $\square$ ).

# D. Open Attached Documents

- 1. Open transaction IW32.
- 2. Click the "Services for Object" button ( 🕫 ).
- 3. Select the "Maintenance order" line and press "Enter" or click on "Continue" (green check).



4. Select "Attachment list"



5. Double-click on the document to be opened.