



# Maintenance Manager Release Notes v4.0.5.2

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## 1 Document Control

### 1.1 Author

Exor Development

### 1.2 Document Summary

This document provides a list of all Logs fixed in this release and information about new functionality.

### 1.3 Document History

| Document History |             |                  |               |
|------------------|-------------|------------------|---------------|
| Revision         | Date        | By               | Description   |
| 1.0              | 20-Feb-2009 | Exor Development | First Edition |

### 1.4 Reference documents

None

### 1.5 Distribution

Exor Customers, Partners and Staff

### 1.6 Quality Assurance

| Document Details                           |                       |
|--|-----------------------|
| File                                       | Prepared By           |
| Maintenance Manager Release Notes v4.0.5.2 | Exor Development      |
| Document Name                              | Reviewed By           |
| Maintenance Manager Release Notes v4.0.5.2 | Mark Lowe             |
| Version                                    | Approved for issue by |
| 1.0  | Colin Stewart         |
| Date of Issue                              | Support Manager       |
| 20-Feb-2009                                | Graham Anns           |

## 2 Introduction

This document defines the changes made to Maintenance Manager following the release of Maintenance Manager v4.0.5.2. It is specifically targeted at users and system administrators of the exor systems.

It is not intended to be a full system description but a guide to indicate what changes have been made, why they have been made and the potential failings if this upgrade is not applied.

After reading through this document, should you have any need for training or consultancy then please contact your **exor** account manager.

## 3 New Functionality

### 3.1 Product Options

The following product options are new and should be set appropriately:

**WCCOMPLETE** – When set to “Y” allows WC file to complete a defect or repair

**XTRIFLDS** – Switches version of interface files – should be set to 2-1-3

### 3.2 Enhancements

| Support Reference | Module  | Issue   |
|-------------------|---------|---|
| 717676            | MAI3800 | When an order is actioned either manually or via a WC file the associated defect should be completed. |
| 715843            | MAI3800 | X and Y co-ordinates now displayed on defects and Inspections form                                    |

### 3.3 Maintenance Manager / TMA Interface

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#### General Information

Maintenance Manager Works Ordering is used to manage Defect clearance, Small Scheme and Cyclic Maintenance work orders. With the introduction of the TMA the Local Authority is required to register and manage the lifecycle of a Notice through different phases of work in order to maintain parity with existing Undertakers. In essence this means that the User must be able to raise and associate different notice types with a work order line.

The user group requirements were that any changes made were to have as minimal effect on the existing work ordering modules MAI3800 & MAI3800a as possible.

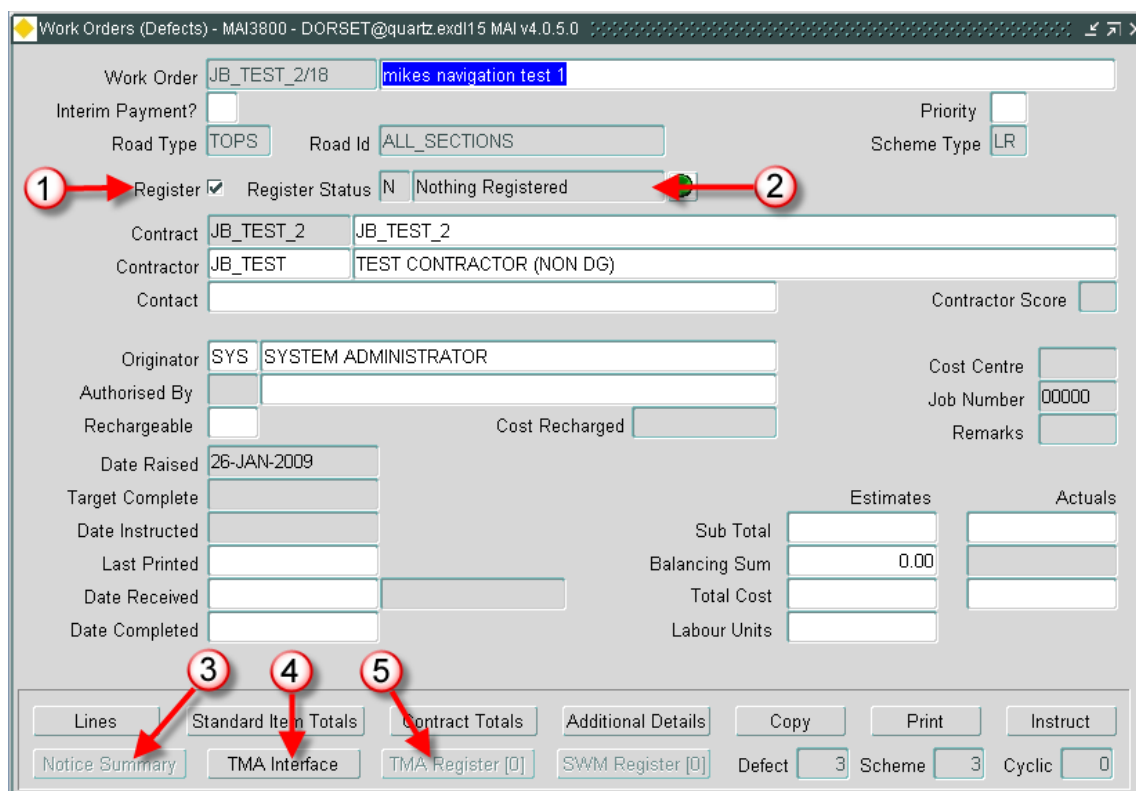
The changes to Maintenance manager to cater for the link with the TMA are as follows:

- Minimal Changes to **Work Ordering - MAI3800 and Mai3800a** modules
- New Module **Work Order TMA Interface – TMA3990**
- Minimal Changes to **Send Notice to Register – TMA1800**

## Maintain Work Orders – MAI3800 and MAI3800a

### Work Orders window

A number of new fields and buttons have been added in order to support the changes being made for the MAI / TMA interface. These changes are detailed below; the screenshot has been annotated to highlight the areas of change.



#### Register (Optional) (Checkbox)

When ticked and saved any existing work order lines will be ticked, any work order lines subsequently added to the work order will have to be ticked manually. If unticked it will de-select all work order lines that have not had a notice generated.

#### Register Status (Display Only)

The calculation of the Register Status has been amended to be based upon the following logic:

- N-Nothing Registered - One or more WOLs have been ticked as registerable but no Notices have been sent for any of them.
- O-Outstanding - One or more WOLs have been ticked as registerable and at least one Notice has been sent for at least one of them.
- C-Complete - All WOLs that have been ticked as registerable have had a "0600" Notice sent.

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#### [Notice Summary] Button

The new *Notice Summary* button is enabled if the TMA Product is licensed and one or more Notices have been sent for the Work Order. Calls the **Work Order TMA Interface - TMA3990** and Navigates to the 'Work Order Lines' tab.

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#### [TMA Interface] Button

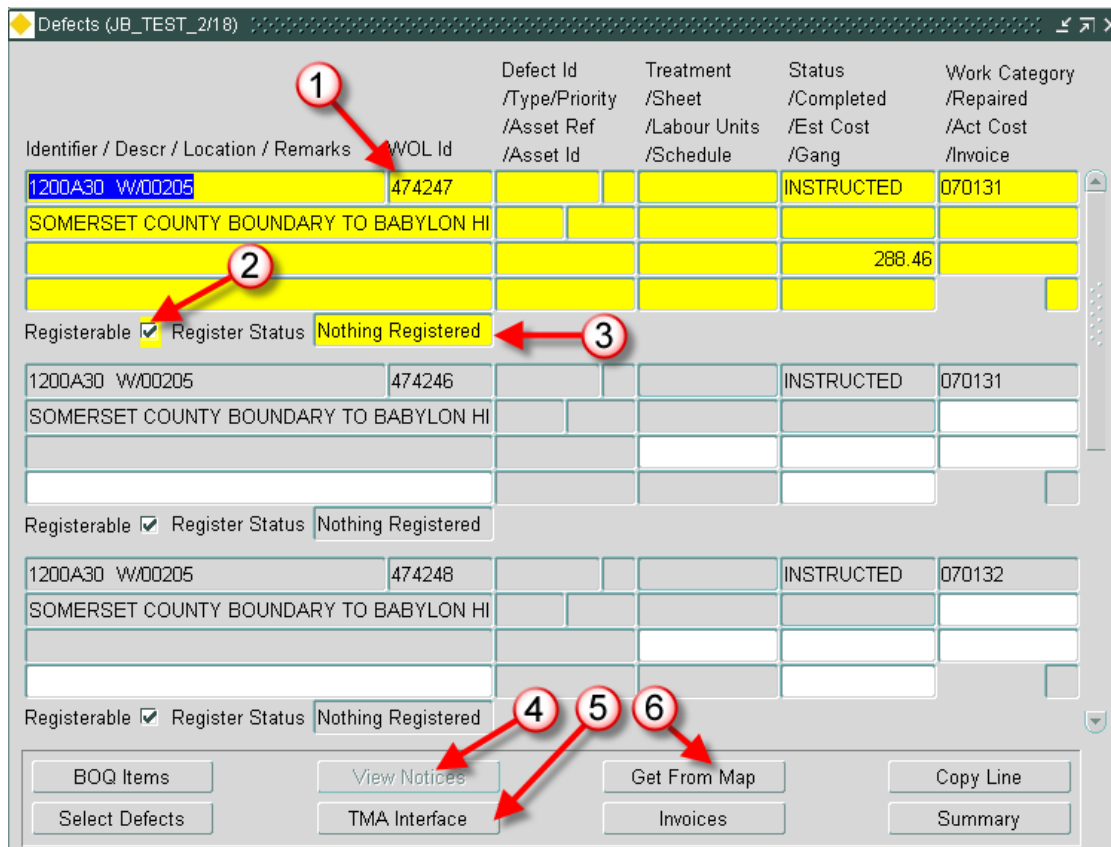
The *TMA Interface* button is enabled if the TMA Product is licensed and one or more Work Order Lines are ticked as *Registerable*. Calls **Work Order TMA Interface - TMA3990** and navigates to the 'TMA Noticing' tab.

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#### [TMA Register] Button

The *TMA Register* button is enabled if the TMA Product is licensed and one or more Notices have been sent for the Work Order. Calls **Works - TMA1000** and displays the TMA Works that have been created for the Work Order.

## Work Order Lines window



The screenshot shows the 'Defects (JB\_TEST\_2/18)' window. It contains a table of Work Order Lines with columns: Identifier / Descr / Location / Remarks, WOL Id, Defect Id /Type/Priority /Asset Ref /Asset Id, Treatment /Sheet /Labour Units /Schedule, Status /Completed /Est Cost /Gang, and Work Category /Repaired /Act Cost /Invoice. Three lines are visible, each with a 'Registerable' checkbox and a 'Register Status' dropdown. Callout 1 points to the 'WOL Id' field of the first line. Callout 2 points to the 'Registerable' checkbox of the first line. Callout 3 points to the 'Register Status' dropdown of the first line. Callout 4 points to the 'View Notices' button. Callout 5 points to the 'TMA Interface' button. Callout 6 points to the 'Get From Map' button.

| Identifier / Descr / Location / Remarks                   | WOL Id | Defect Id /Type/Priority /Asset Ref /Asset Id | Treatment /Sheet /Labour Units /Schedule | Status /Completed /Est Cost /Gang | Work Category /Repaired /Act Cost /Invoice |
|---|--------|---|--|-----------------------------------|--|
| 1200A30 W/00205<br>SOMERSET COUNTY BOUNDARY TO BABYLON HI | 474247 |   |  | INSTRUCTED                        | 070131                                     |
|   |        |   |  | 288.46                            |  |
| 1200A30 W/00205<br>SOMERSET COUNTY BOUNDARY TO BABYLON HI | 474246 |   |  | INSTRUCTED                        | 070131                                     |
|   |        |   |  |                                   |  |
| 1200A30 W/00205<br>SOMERSET COUNTY BOUNDARY TO BABYLON HI | 474248 |   |  | INSTRUCTED                        | 070132                                     |
|   |        |   |  |                                   |  |

Buttons at the bottom: BOQ Items, Select Defects, View Notices, TMA Interface, Get From Map, Invoices, Copy Line, Summary.

### Work Order Lines (Display Only)

This will display the Work Order Lines internal Id number.

### Registerable (Checkbox)

This tick box is used to indicate whether an individual line should be registered with TMA. If this is ticked and the Work Order level Register tick box hasn't then it will automatically be updated.

### Register Status (Display Only)

This new Line level *Register Status* field indicates the Noticing Status of the individual Work Order Line. The status of this field depends on the following logic:

- Nothing Registered - The WOL has been ticked as 'Registerable' but no Notices have been sent for it.
- Outstanding - The WOL has been ticked as 'Registerable' and at least one Notice has been sent for it but not a 0600 – Works Stop Notice.
- Completed - The WOL has been ticked as 'Registerable' and a 0600 – Works Stop Notice has been sent.

### [View Notices] Button

This new button is enabled when one or more Notices have been sent for the currently selected Work Order Line. Calls **Work Order TMA Interface - TMA3990** in read only mode and navigates to the 'Work Order Lines' tab.



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#### [TMA Interface] Button

This new button is enabled when one or more Work Order Lines are ticked as 'Registerable'. Calls **Work Order TMA Interface - TMA3990** and navigates to the 'TMA Noticing' tab (this is the same functionality as the Work Order level [TMA Interface] button).

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#### [Get From Map] Button

This new button is enabled when the WOL Id is populated and the Work Order Line status is not COMPLETE. Calls **Locator - NM0572** and allows the user to digitise a new location or shape for the defect or work order. This will give the user the option to enter a point, Polyline or Polygon that better represents the location and the shape of the work to be carried out on the selected work order line. There is more detail later in this document.

## Work Order TMA Interface – TMA3990

### General Information

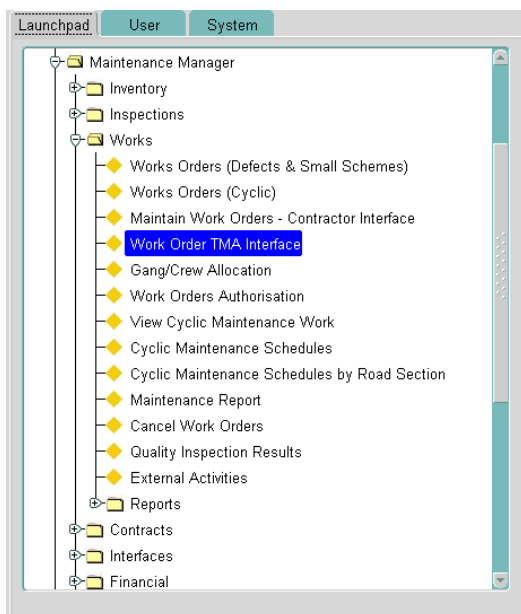
This is a new module that allows the user to manage the notices that are to be generated for the work order lines in both Work Orders (Defect and Small Scheme) - MAI3800 and Work Orders (Cyclic) - MAI3800a.

The purpose of this module is:

- To automatically derive and associate one or more USRN's for each instructed, registered work order line. Multiple work order lines may be on one notice if those lines all fall on the same street. Multiple Notices may be generated for one work order line if that work order line spans a number of streets.
- To facilitate the production of key TMA notice against each affected USRN throughout the life cycle of the works

This module can be called in a number of ways:

- Using fastpath and the module Id – TMA3990
- By the selection of the [TMA Interface] button form within the Work Ordering Modules MAI3800 and MAI3800a
- Directly from the Menu as shown below, the user will have to query back the work order number required.



## TMA Noticing Tab

Work Order TMA Interface - TMA3990 - DORSET@quartz.exd115 MAJ v4.0 5.0

Work Order# **JB\_TEST\_2/13** Description **JB\_TEST\_2/13 COPY** Date Raised **20-JAN-2009**

TMA Noticing **Work Order Lines**

**TMA Notices**

| TMA Works Ref | USRN     | Street Name    | Phase End Date | Last Notice Type | New Notice Type   | WOL Count | Select Notice            |
|---------------|----------|----------------|----------------|------------------|-------------------|-----------|--------------------------|
| DC0083491     | 27600952 | SALISBURY ROAD | 28-JAN-2009    | Initial Notice   | Actual Start Date | 4         | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |
|               |          |                |                |                  |                   |           | <input type="checkbox"/> |

TMA Works Description  
JB\_TEST\_2/13 COPY

**Work Order Lines**

| WOL Id | Location | Road Id | Description                          | Defect Id | Type | Priority | End Date | TMA Notice Count | Select WOL                          |
|--------|----------|---------|--------------------------------------|-----------|------|----------|----------|------------------|-------------------------------------|
| 474203 |          | 1200A30 | E003 WESTBOUND DUAL C/WAY - START OF |           |      |          |          | 1                | <input checked="" type="checkbox"/> |
| 474204 |          | 1200A30 | E003 WESTBOUND DUAL C/WAY - START OF |           |      |          |          | 1                | <input checked="" type="checkbox"/> |
| 474205 |          | 1200A30 | E003 WESTBOUND DUAL C/WAY - START OF |           |      |          |          | 1                | <input checked="" type="checkbox"/> |
| 474213 |          | 1200A30 | E003 WESTBOUND DUAL C/WAY - START OF |           |      |          |          | 1                | <input checked="" type="checkbox"/> |
|        |          |         |                                      |           |      |          |          |                  | <input type="checkbox"/>            |
|        |          |         |                                      |           |      |          |          |                  | <input type="checkbox"/>            |
|        |          |         |                                      |           |      |          |          |                  | <input type="checkbox"/>            |
|        |          |         |                                      |           |      |          |          |                  | <input type="checkbox"/>            |

Send To Register  
View TMA Works

These three fields will be automatically queried if TMA3990 is called from the Work Ordering modules. If called from the Menu the user will have to query back the required work order number.

- Work Order
- Description
- Date Raised

### TMA Works Ref (Display Only)

When the notice has been sent to the TMA Register the Works reference will be displayed. This will be blank until the first notice is sent to the register.

### USRN

(Display Only)

The USRN that has been derived against the work order line will be displayed.

- For Defect Clearance work order the USRN's will be derived based on the Road Section against the defect and the xy, measure available on the defect to find the accurate USRN.
- For Small Scheme and Cyclic Work orders USRN's will be derived based on the Road Section against the Work Order Line.

There are cases when USRN cannot be determined for the Road Section. In such cases the Street field will be populated with **Street cannot be determined for the Road Section** and the Select Notice check box will be disabled. User will not be allowed to send any TMA Notice against the work Order Line.

### Street Name (Display, Query)

The Street Name for the derived USRN will be displayed.

#### Phase End Date (Display, Query)

This is the TMA actual end date, if this is not available the estimated end date will be displayed.

#### Last Notice Type (Display, Query)

The last notice type that has been sent from the list of notices displayed below will be displayed. For the available notices, see below:

#### Next Notice Type (Display, Query)

The next notice from the available list of notices for the selected regime will be displayed. For the available notices, see below

#### How the Notice Types are derived.

As requested by the user group only a subset of works notices will be processed from this interface. Other notice types will have to be manually entered using the TMA modules.

The noticing regime (Notice or Permit) will be derived from the street characteristics.

The following notice types may be used:

- 0200-Initial Notice
- 0210-PAA (Major) / Permit Application (Non-Major)
- 0300-Confirmation Notice
- 0310-Permit Application
- 0400-Actual Start Date
- 0600-Works Stop

Once the noticing regime has been derived and a notice has been sent only notices relevant to the specific regime will be used.

#### WOL Count (Display Only)

The number of work order lines associated with Notice will be displayed. A summary of the work order lines for this notice will be displayed in the work order lines area at the bottom of the window.

#### Select Notice (Checkbox)

Select / Deselect the notice that is to be progressed.

The user now has two options for a selected notice

1. Select the **[Send to Register]** button to send the notice to **Send Notice to Register – TMA1800**. The system will send the 'Next Notice Type' notice. The user can then make changes and view errors and warnings prior to sending to the Register.
2. If a notice has already been sent they can select the **[View TMA Works]** button to view **Works – TMA1000**.



Select all and deselect all can be used to select the notices if required.

When the Checkbox is selected the following validation is carried out:

- If a notice is selected the system will search for all TMA Notices against the work order line and marks all notices associated with the work order line as selected
- If a notice is selected that has multiple work order lines then all the notices against those work order lines will be selected

#### TMA Works Description (Display Only)

The Works Description that had been entered and edited **using Send Notice to Register - TMA1800** will be displayed.

#### WOL Id (Display Only)

The unique system generated work order line Id will be displayed.

#### Location (Display Only)

The defect location will be displayed if the selected work order line is a defect clearance line.

#### Road Id (Display Only)

The road id for the selected work order line will be displayed.

#### Description (Display Only)

The road section description for the work order line will be displayed.

#### Defect Id (Display Only)

For defect clearance work order lines the defect Id will be displayed.

#### Type (Display Only)

For defect clearance work orders the defect type code will be displayed, for example POTH.

#### Priority (Display Only)

For a defect clearance work order the defect priority will be displayed, for example 2.1.

#### End Date (Display Only)

For defect clearance work orders the *Defect Due* by date will be displayed. For small scheme and cyclic work orders the *Target Date* will be displayed.

#### TMA Notice Count (Display Only)

The number of notices that this work order line is on will be displayed. Small scheme and Cyclic work order lines may span more than one USRN.

#### Select WOL (Checkbox)

This Checkbox is used to include or exclude a work order line from the highlighted notice above. Default for the highlighted notice is to select the Checkbox.

When the Checkbox is unchecked the following validation is carried out:

- If it is the only WOL against the selected Notice and the WOL has only one Notice against it, if the check box gets deselected, the Select Notice check box becomes non selectable for this WOL so no notice can be generated.
- If it is not the only WOL against the selected Notice and the WOL has only one Notice against it then the check box gets deselected. The Select Notice checkbox remains checked for those work order lines that remain against the notice so the notices can be generated.
- If it is the only WOL against the Notice and the WOL has more than one Notices against it then, a warning is issued, **WOL has more than 1 USRN's, deselecting this WOL will not create any notice against it.** The check box get deselected and also deselects this WOL from other TMA Notices in the form and the Select Notice check box becomes non selectable for this WOL so no notice can be generated.



Show Map, when the user has highlights a notice in the top half of the form they may select the [Show Map] button to display the USRN that has been selected.

## Work Order Lines Tab

Work Order TMA Interface - TMA3990 - DORSET@quartz.exdl15 MAI v4.0.5.0

Work Order: DEFAULT8 Description: DORSET/DEFAULT8 Date Raised: 21-FEB-2009

Tab: Noticing Work Order Lines

| WOL Id | Location           | Road Id       | Description                         | Defect Id | Type | Priority | End Date | TMA Notice Count |
|--------|--------------------|---------------|-------------------------------------|-----------|------|----------|----------|------------------|
| 474375 | opposite l/c 34    | 1200C129/0012 | JCT U/C ROAD, HOLDITCH, TO SOMERSET | 361531    | POTH | 2.1      |          | 0                |
| 474376 | just before lane   | 1200C129/0012 | JCT U/C ROAD, HOLDITCH, TO SOMERSET | 361532    | POTH | 1        |          | 1                |
| 474377 | near jct with c129 | 1200D10102/00 | JCT C129, NEAR BROOM, TO DEVON COU  | 361533    | POTH | 2.1      |          | 0                |
| 474378 |                    | 1200C129/0012 | JCT U/C ROAD, HOLDITCH, TO SOMERSET | 361534    | POTH | 2.1      |          | 0                |

TMA Notices

| Works Ref | Description    | Status | Comments | Street Name   | USRN     | Trx Date  | Select                   |
|-----------|----------------|--------|----------|---------------|----------|-----------|--------------------------|
| DC0083943 | Initial Notice | WSEND  |          | HOLDITCH LANE | 43201170 | 21-FEB-09 | <input type="checkbox"/> |

View Works Order

View TMA Works

This tab shows the information in the reverse way to that of the TMA Noticing Tab.  
If this module is called directly from the menu this will be the default tab the user will be presented with.

All of the fields within this tab are Display only with the exception of:

### Select (Checkbox)

This checkbox is selected followed by [View TMA Works] to take the user to **Works - TMA1000** to display the works details for the selected notice.

### [View Works Order] Button

If this module has been called from the menu this will display Works Orders – MAI3800/MAI3800a.

## Send Notice to Register – TMA1800

### General Information

When the form is called from TMA3990 it will automatically query back the details of the “candidate” notices that the user asked to be produced.

If no notices were selected in TMA3990, then the message ‘No records to process’ will appear when the form starts. Once the alert box has been dismissed the form will exit and you will return to where you came from.

◆ Send Notice to Register - TMA1800 - DORSET@quartz.exdl15 TMA v4.1.0.0

| USRN*    | Notice Type*                 | Choice of Notice                    | Promoter* | District* | Works Reference | Selected                            | Dealt With               |
|----------|------------------------------|-------------------------------------|-----------|-----------|-----------------|-------------------------------------|--------------------------|
| 43200230 | FLEET STREET                 | <input type="checkbox"/>            | 1245      | 008       | DC0083871       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 43210008 | ADAMS GREEN                  | <input type="checkbox"/>            | 1245      | 008       | DC0083872       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 43200249 | WOOTTON LANE TO BAKERS CROSS | <input checked="" type="checkbox"/> | 1245      | 008       | DC0083873       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Record 1 of 3

**Work Details**

Recipient Org: 1245 DORSET COUNTY COUNCIL

Recipient District: 001 DORSET COUNTY COUNCIL

Works Category\*: Minor No. of Phases\*: 1

CVWay Restrict Type\*: None / signing only

Works Description\*: JS - PLANNED PATCHING PRIOR TO SURFACE DRESSING

Location Description\*: FLEET STREET BEAMINSTER

Ext. Ref: ARW9714104

Estimated Start Date\*: 29-JAN-2009 Estimated End Date\*: 29-JAN-2009

Actual Start Date: Actual End Date:

Start Time:

Estimated Insp Units\*: 1 Actual Insp Units:

Works Restricted: ☐ Parking Suspensions: ☐

Working Hours: ☐ Footway Closure: ☐

Notes

Default duration for this works category is 3 working days.  
Earliest defect completion date [19-JAN-1998] has passed, therefore end date defaulted to current date.

**Validation Results**

Error/Warning Message

Warning Notice submitted late, possible FPN

Warning Works starting early, need agreement to start before expiry of notice p

Additional Information

Issue Date is 29-JAN-2009. Estimated Start Date is 29-JAN-2009

Defaults Send To Register

## Upper Section

| USRN*    | Notice Type*                 | Choice of Notice | Promoter*                   | District*                           | Works Reference | Selected | Dealt With |                                     |                          |
|----------|------------------------------|------------------|-----------------------------|-------------------------------------|-----------------|----------|------------|-------------------------------------|--------------------------|
| 43200230 | FLEET STREET                 | 0200             | Initial Notice              | <input type="checkbox"/>            | 1245            | 008      | DC0083889  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 43210008 | ADAMS GREEN                  | 0210             | PAA (Major) / Permit Applic | <input type="checkbox"/>            | 1245            | 008      | DC0083890  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 43200249 | WOOTTON LANE TO BAKERS CROSS | 0210             | PAA (Major) / Permit Applic | <input checked="" type="checkbox"/> | 1245            | 008      | DC0083891  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|          |                              |                  |                             | <input type="checkbox"/>            |                 |          |            | <input type="checkbox"/>            | <input type="checkbox"/> |
|          |                              |                  |                             | <input type="checkbox"/>            |                 |          |            | <input type="checkbox"/>            | <input type="checkbox"/> |

Record 1 of 3

This section of the form will display all the notices that were selected in **Work Order TMA Interface – TMA3990**

### USRN (Display Only)

This will display the USRN and Street Name as selected in TMA3990, when called from TMA3990 the street cannot be updated.

When Called from Enquiries – DOC0150 the street can be changed.

### Notice Type (Default, Update) List

The notice type will default to the value displayed in TMA3990. The list of values will present the relevant notice types (Notice or Permit) from the following:

- 0200-Initial Notice
- 0210-PAA (Major) / Permit Application (Non-Major)
- 0300-Confirmation Notice
- 0310-Permit Application
- 0400-Actual Start Date
- 0600-Works Stop

### Choice of Notice (Checkbox) List

This will be ticked if there is more than one notice type that can be sent. For example:

1. The street is on a permit and a NRSWA regime and an 0200/0210 needs to be picked
2. There is a choice between sending an 0300 or jumping straight to a 0400.

### Promoter Org / District (Default, Update) List

This will default to the current users org/district as defined in **My Districts – NSG0130**. This can be updated if required

### Works Reference (Default)

This will display the Work Order Number as selected in TMA3990.

### Selected (Checkbox)

This will automatically be ticked unless another user is updating the record in the TMA. This will be selected followed by the [Send to Register] button to send the notices to the register.

This cannot be selected once the 'Dealt With' checkbox has been selected.

### Dealt With (Checkbox)

This will automatically be unticked unless another user is updating the record in the TMA. This will be checked automatically once the notice has been successfully sent to the register.



## Work details tab

| Work Details  | Contacts  | Coordinates           | Permit Conditions        | Work Order Lines |
|---|---|-----------------------|--------------------------|------------------|
| Recipient Org   | 1245  | DORSET COUNTY COUNCIL |                          |                  |
| Recipient District  | 001   | DORSET COUNTY COUNCIL |                          |                  |
| Works Category*   | Minor   |                       |                          | No. of Phases* 1 |
| CWay Restrict Type*   | None / signing only                             |                       |                          |                  |
| Works Description*  | JS - PLANNED PATCHING PRIOR TO SURFACE DRESSING |                       |                          |                  |
|   | Defects   |                       |                          |                  |
| Location Description*   | FLEET STREET BEAMINSTER                         |                       |                          |                  |
| Ext. Ref.   | ARW9714104                                      |                       |                          |                  |
| Estimated Start Date*   | 29-JAN-2009                                     |                       | Estimated End Date*      | 29-JAN-2009      |
| Actual Start Date   |   |                       | Actual End Date          |                  |
| Start Time  |   |                       |                          |                  |
| Estimated Insp Units*   | 1   |                       |                          |                  |
| Actual Insp Units   |   |                       |                          |                  |
| Works Restricted  | <input type="checkbox"/>                        | Parking Suspensions   | <input type="checkbox"/> |                  |
| Working Hours   | <input type="checkbox"/>                        | Footway Closure       | <input type="checkbox"/> |                  |
| Notes   |   |                       |                          |                  |
| Default duration for this works category is 3 working days.   |   |                       |                          |                  |
| Earliest defect completion date [19-JAN-1998] has passed, therefore end date defaulted to current date. |   |                       |                          |                  |

### Recipient Org/Dist

### (Display Only)

This will display the primary recipient of the given notice type based on the USRN that the notice is for.

#### Note:

For 0200 and 0210 notices the primary recipient of the notice is derived from the street ASD. If there are a number of interested parties in the street, copy recipients are identified and included on the notice but not shown on the form.

For other notice types the primary and copy recipients of the opening 0200/0210 notice are identified and those are the ones included on the notice. As before, copy recipients may be included on the notice but not shown on the form

### Works Category

### (Default)

### List

For Initial notices this will display the default works category, as set up in the [defaults] button. This can be amended if required. If changed it will update the estimated start date field.

For other notices it is the current value from the works/phase.

### Number of Phases

### (Default)

For Initial notices this will display the default value as set up in the [defaults] button. This can be amended if required.

For other notices it is the current value from the works/phase.

### Works Description (Default)

For Initial notices this will display the maintenance manager work order description then a list of all the defects associated with the relevant work order lines. This can be updated if required.

For other notices it is the current value from the works/phase.

### Location Description (Default)

For Initial notices this will display the location of the first work order line with a location. This can be amended if required.

For other notices it is the current value from the works/phase.

### Estimated Start Date (Default)

The estimated start date will be displayed. This can be updated.

The system will derive the estimated start date based on the following:

1. Get the earliest repair due date from the associated work order lines (defect clearance).  
If this does not exist it will use the work order target completion date.
2. Work out what the default duration is for the category of works being noticed from metadata.  
An example is shown below:

| Works Category          | Default Duration |
|-------------------------|------------------|
| 1-Major                 | 20               |
| 2-Standard              | 10               |
| 3-Minor                 | 3                |
| 4-Immediate - Urgent    | 1                |
| 5-Immediate - Emergency | 1                |
| 98-Unattributable       | 1                |
| 99-Barholes             | 1                |

3. Work out the TMA notice period for the category of works/notice type being produced

For example.

If we have a value for the target date

If target date is today OR in the future then

end date = target date

start date = estimated end date minus the default duration. Ensure that start date cannot be < today.

Else if that target date < today then

estimated end date to today

estimated start date to today

Else

start date = today

end date = start date plus the default duration.

End if

### Estimated End Date (Default)

This will default to the earliest start date for the individual work order lines or the target date for the work order. This can be updated.

### Actual Start Date (Default)

For Initial notices this will be null. This can be updated.

For other notices it's the current value from the works/phase.

If that value is null and you've instructed TMA3990 to send an Actual Start Notice then the value will get defaulted to the estimated start date.

### Actual End Date (Default)

For Initial notices this will be null. This can be updated.

For other notices it's the current value from the works/phase.

If that value is null and you've instructed TMA3990 to send an Actual Start Notice then the value will get defaulted to the estimated end date.

---

**Estimated Insp. Units (Default)**

For Initial notices this will display the default value, as set up in the [defaults] button. This can be amended if required.

For other notices it is the current value from the works/phase.

---

**Actual Insp. Units (Default)**

For Initial notices this will default to null. This can be updated.

For other notices it is the current value from the works/phase.

---

**Works Restricted****Working Hours****Parking Suspensions****Footway Closure (Checkbox, Default)**

---

For Initial notices this will display the default value, as set up in the [defaults] button. This can be amended if required.

For other notices it is the current value from the works/phase.

---

**Notes (Default)**



Populated with relevant details as to how the estimated start/end dates are derived when the form is invoked with the intention of sending an initial notice.

Can also contain a message about locking – should there be a locking issue.

**Note:**

The notes do not change as you change attribution of block items i.e. they are static and a way of informing the end user how the original values on the record were derived.

## Contracts tab

| Work Details       | Contacts  | Coordinates | Permit Conditions | Work Order Lines |
|--------------------|---|-------------|-------------------|------------------|
| Promoter Contact   | DOROTHY        |             |                   |                  |
| Address            | somewhere   |             |                   |                  |
|                    | over  |             |                   |                  |
|                    | the   |             |                   |                  |
|                    | rainbow   |             |                   |                  |
|                    | way up high   |             |                   |                  |
| Postcode           | WA3 6WY   |             |                   |                  |
| Telephone          | 0161 123456   |             |                   |                  |
| Contractor Contact | COWARDLY LION  |             |                   |                  |
| Address            | lions   |             |                   |                  |
|                    | tigers  |             |                   |                  |
|                    | and   |             |                   |                  |
|                    | bears   |             |                   |                  |
|                    |   |             |                   |                  |
| Postcode           | WA3 6WY   |             |                   |                  |
| Telephone          | 0161 654321   |             |                   |                  |

### Promoter Contact (Default)

For Initial notices this will display the default value, as set up in the [defaults] button. This can be amended if required.

For other notices it is the current value from the works/phase.

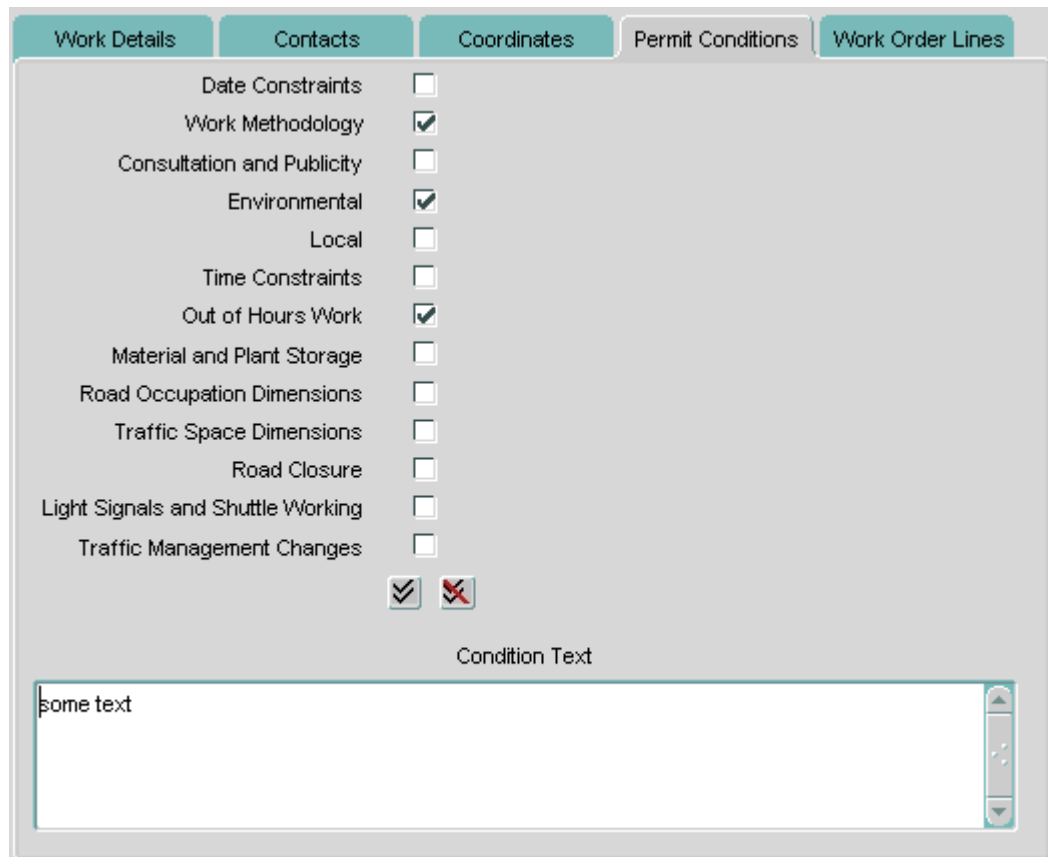
### Contractor Contact (Default)

For Initial notices this will display the default value, as set up in the [defaults] button. This can be amended if required.

For other notices it is the current value from the works/phase.



## Permit Conditions tab



| Work Details                      | Contacts                            | Coordinates | Permit Conditions | Work Order Lines |
|-----------------------------------|-------------------------------------|-------------|-------------------|------------------|
| Date Constraints                  | <input type="checkbox"/>            |             |                   |                  |
| Work Methodology                  | <input checked="" type="checkbox"/> |             |                   |                  |
| Consultation and Publicity        | <input type="checkbox"/>            |             |                   |                  |
| Environmental                     | <input checked="" type="checkbox"/> |             |                   |                  |
| Local                             | <input type="checkbox"/>            |             |                   |                  |
| Time Constraints                  | <input type="checkbox"/>            |             |                   |                  |
| Out of Hours Work                 | <input checked="" type="checkbox"/> |             |                   |                  |
| Material and Plant Storage        | <input type="checkbox"/>            |             |                   |                  |
| Road Occupation Dimensions        | <input type="checkbox"/>            |             |                   |                  |
| Traffic Space Dimensions          | <input type="checkbox"/>            |             |                   |                  |
| Road Closure                      | <input type="checkbox"/>            |             |                   |                  |
| Light Signals and Shuttle Working | <input type="checkbox"/>            |             |                   |                  |
| Traffic Management Changes        | <input type="checkbox"/>            |             |                   |                  |

Condition Text

some text

On entering this tab, all checkboxes will be unticked and the condition text will be null.

## Work Order Lines tab

| ID    | Description                                   |
|-------|---|
| 24444 | 100604 PMCK 2.2 BAKER CROSS WOOTTON FITZPAINE |
|       |   |
|       |   |
|       |   |
|       |   |
|       |   |
|       |   |
|       |   |
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|       |   |
|       |   |
|       |   |
|       |   |
|       |   |

### **Id** (Display Only)

This will display the unique system generated work order line Id.

### **Description** (Display Only)

This will display a concatenation of Defect Id, Defect Type, Priority and Location.

## Error Stack

Validation Results

| Error/Warning | Message   |
|---------------|---|
| Error         | Mandatory value(s) missing  |
| Warning       | Notice submitted late; possible FPN                                     |
| Warning       | Works starting early; need agreement to start before expiry of notice p |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |
|               |   |

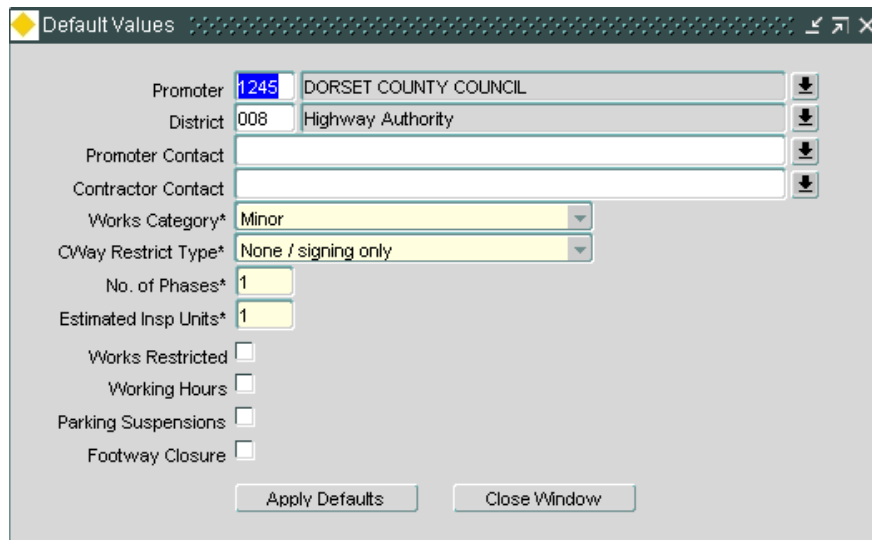
Additional Information

Both ConditionType and ConditionText required when one is supplied

This works in the same way as the error stack in TMA1001. This will display the errors and warnings for the selected notice. The highlights error will have a more descriptive text in the Additional Information window. The errors and warnings are refreshed as the user moves from notice to notice or by the selection of the green refresh button.



## Defaults button



|                       |                          |                       |   |
|-----------------------|--------------------------|-----------------------|---|
| Promoter              | 1245                     | DORSET COUNTY COUNCIL | ↓ |
| District              | 008                      | Highway Authority     | ↓ |
| Promoter Contact      |                          |                       | ↓ |
| Contractor Contact    |                          |                       | ↓ |
| Works Category*       | Minor                    |                       |   |
| CWay Restrict Type*   | None / signing only      |                       |   |
| No. of Phases*        | 1                        |                       |   |
| Estimated Insp Units* | 1                        |                       |   |
| Works Restricted      | <input type="checkbox"/> |                       |   |
| Working Hours         | <input type="checkbox"/> |                       |   |
| Parking Suspensions   | <input type="checkbox"/> |                       |   |
| Footway Closure       | <input type="checkbox"/> |                       |   |

Apply Defaults Close Window

The [Defaults] button will display the defaults window. These defaults are set for the selected set of notices in the current session. To permanently change the defaults for the system you will need to speak with Support because the following table will need updating – TMA\_SEND\_TO\_REGISTER\_GATEWAYS.

The [Apply Defaults] button will cycle through all the notice records selected and update the relevant attributes with the default values set.



## Configuration

### User Roles

Each user that needs to use the Work Order TMA Interface will need a role assigned to give them access to MAI3800, TMA1800 and TMA3990

You get the following module roles created “out of the box” when TMA is implemented.

#### TMA1800

- TMA\_USER

#### TMA3990

- TMA\_USER

It is envisaged that each of these users will therefore need the role of TMA\_USER assigning.

### User Org/District

For a default promoter org/district to be assigned to a works in TMA1800, each user that needs to use the Work Order TMA Interface will need to have a default org/district created using NSG0120.

◆ Administer User Districts - NSG0120 - DORSET@quartz.evdi15 NSG v4.0.5.1

| - Users   |           |                |
|-----------|-----------|----------------|
| Username* | Initials* | Name*          |
| AACKERMAN | AAX       | ANDY ACKERMAN  |
| AAMARTIN  | AAM       | ARNOLD MARTIN  |
| AAYLOTT   | A_A       | ANDY AYLOTT    |
| ABERRY    | ABX       | ANDREW BERRY   |
| ABRADLEY  | AXB       | ANDREW BRADLEY |
| ABRISTOW  | AB        | ALLAN BRISTOW  |
| ABROWN    | AB1       | ANDY BROWN     |
| ACHENEY   | AMC       | ALISON CHENEY  |
| ACONQUER  | AXC       | ANGELA CONQUER |
| ACRANE    | AZC       | ANNE CRANE     |
| ADE_TEST1 | A1        | ADE_TEST1      |
| ADE_TEST2 | AE2       | ADE_TEST2      |
| ADE_TEST3 | AE3       | ADE 3          |
| ADIMOND   | AD        | ALISON DIMOND  |
| AEVANS    | ALE       | LES EVANS      |
| AFOX      | AMF       | ANGELA FOX     |


| - User District(s) |                       |     |                       |
|--------------------|-----------------------|-----|-----------------------|
| Organisation*      | District*             |     |                       |
| 1245               | DORSET COUNTY COUNCIL | 001 | DORSET COUNTY COUNCIL |
|                    |                       |     |                       |
|                    |                       |     |                       |
|                    |                       |     |                       |
|                    |                       |     |                       |
|                    |                       |     |                       |
|                    |                       |     |                       |
|                    |                       |     |                       |

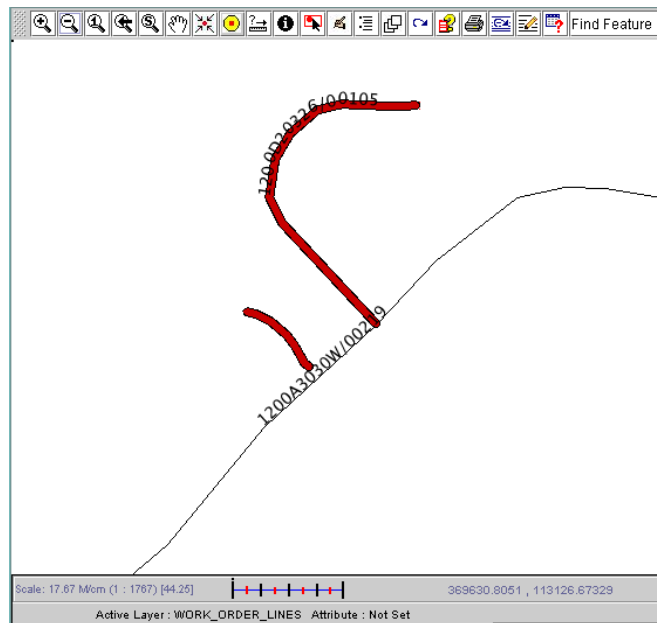
### Standard Text


The works description and location fields in TMA1800 are receptive to standard text, should it be configured.

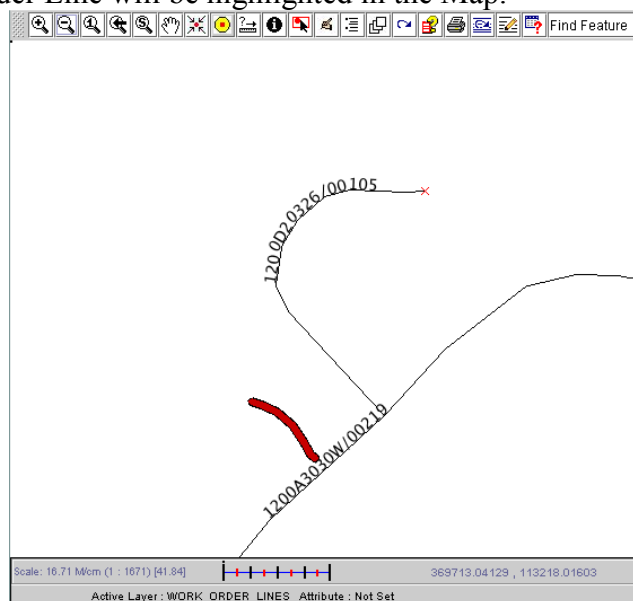
## Work Orders – MAI3800 – View through Locator

### General Information

When a work order has been created and saved, the complete work order can be viewed through locator by selecting the Show Map  button when in the work order screen as shown below:



If the  button is pressed from the Work Order Lines canvas then only then shape for the current Work Order Line will be highlighted in the Map.

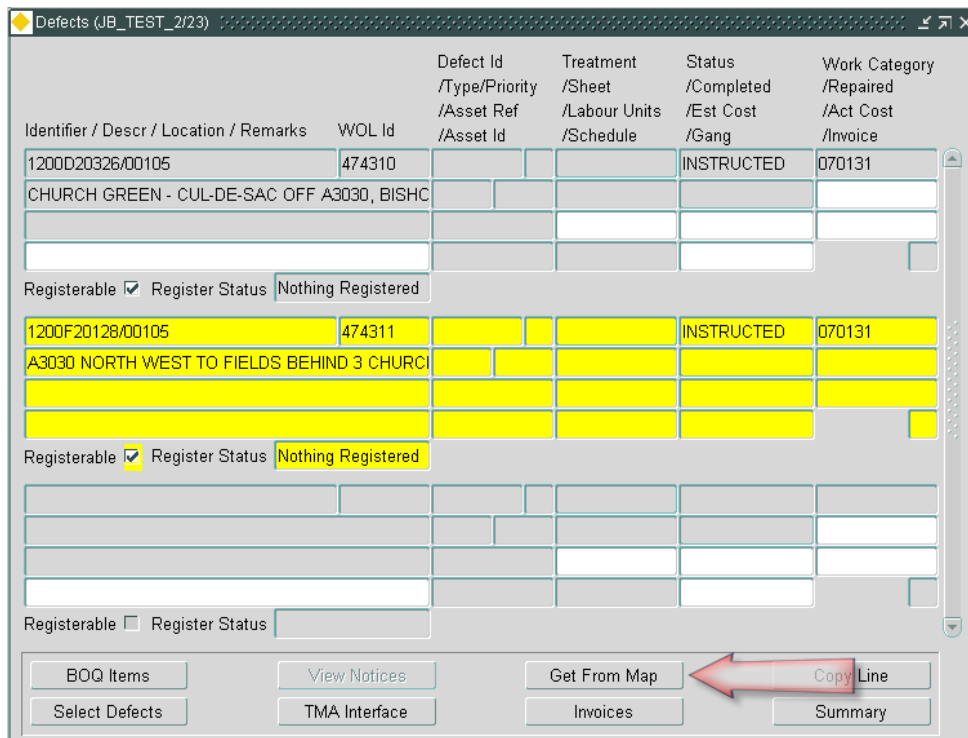


## Work Orders – MAI3800 – Edit Default WOL Shape

### General Information

When a work order line has been created against a work order it has been requested that the user be able to digitise a new location or shape that more accurately represents the work order line.

In order to edit the default shape of a Work Order Line the [Get From Map] button on the Work Order Line window should be used:



| Identifier / Descr / Location / Remarks   | WOL Id | Defect Id<br>/Type/Priority<br>/Asset Ref<br>/Asset Id | Treatment<br>/Sheet<br>/Labour Units<br>/Schedule | Status<br>/Completed<br>/Est Cost<br>/Gang | Work Category<br>/Repaired<br>/Act Cost<br>/Invoice |
|---|--------|--|---|--|---|
| 1200D20326/00105  | 474310 |  |   | INSTRUCTED                                 | 070131  |
| CHURCH GREEN - CUL-DE-SAC OFF A3030, BISHC  |        |  |   |  |   |
|   |        |  |   |  |   |
|   |        |  |   |  |   |
| Registerable <input checked="" type="checkbox"/> Register Status Nothing Registered |        |  |   |  |   |
| 1200F20128/00105  | 474311 |  |   | INSTRUCTED                                 | 070131  |
| A3030 NORTH WEST TO FIELDS BEHIND 3 CHURCH  |        |  |   |  |   |
|   |        |  |   |  |   |
|   |        |  |   |  |   |
| Registerable <input checked="" type="checkbox"/> Register Status Nothing Registered |        |  |   |  |   |
|   |        |  |   |  |   |
|   |        |  |   |  |   |
|   |        |  |   |  |   |
| Registerable <input type="checkbox"/> Register Status                               |        |  |   |  |   |

Buttons: BOQ Items, View Notices, Get From Map, Copy Line, Select Defects, TMA Interface, Invoices, Summary

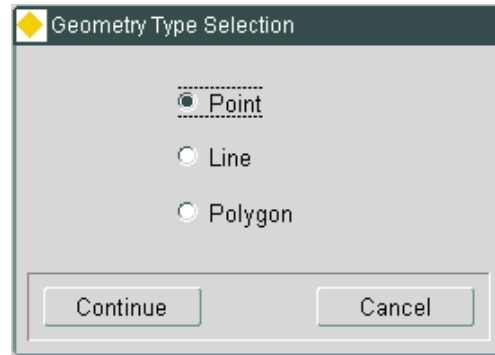
The [Get from Map] button is only enabled when the Work Order Line is populated and is not COMPLETED.

Once the [Get From Map] button has been selected the form will search for themes where:-

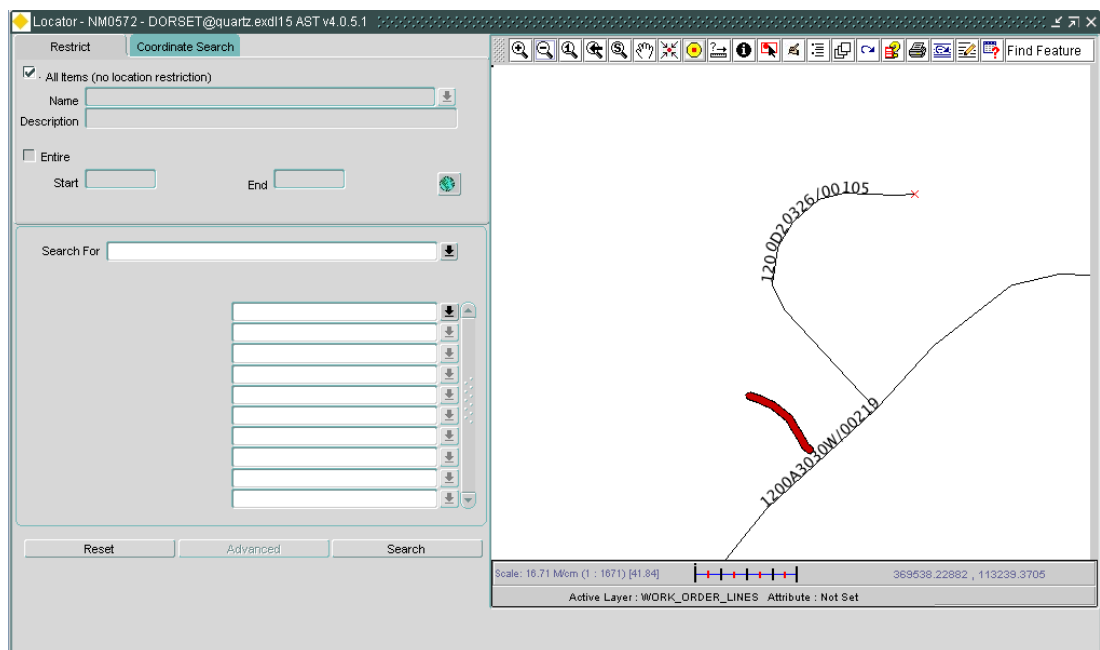
- The theme is based on the Work Order Lines base theme.
- The theme has MAI3800 as a theme function.

If more than one theme is found the extended LOV will be displayed for the user to select the desired theme.

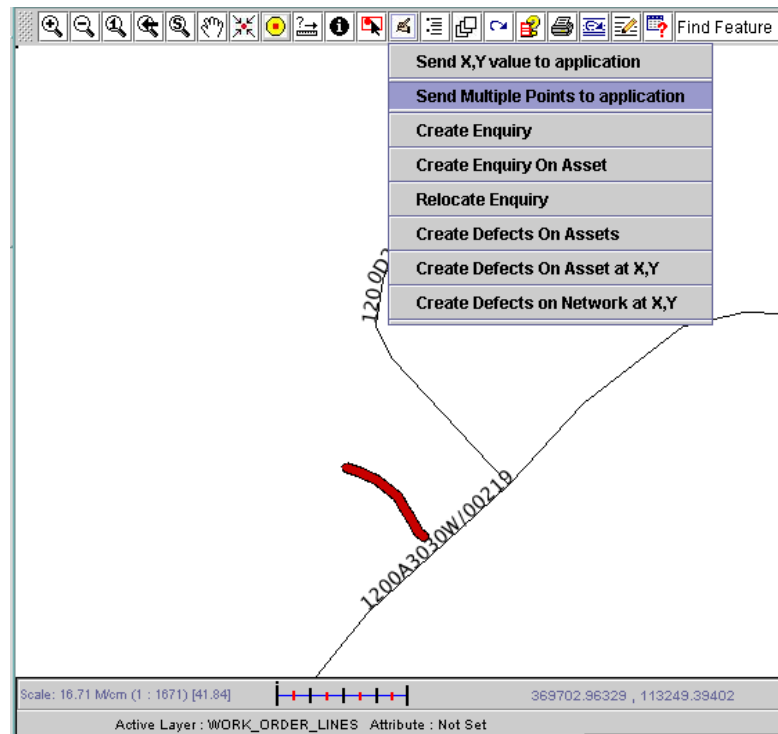
The form will then display a pop-up window prompting the User to select a Geometry type for the new Work Order Line shape.



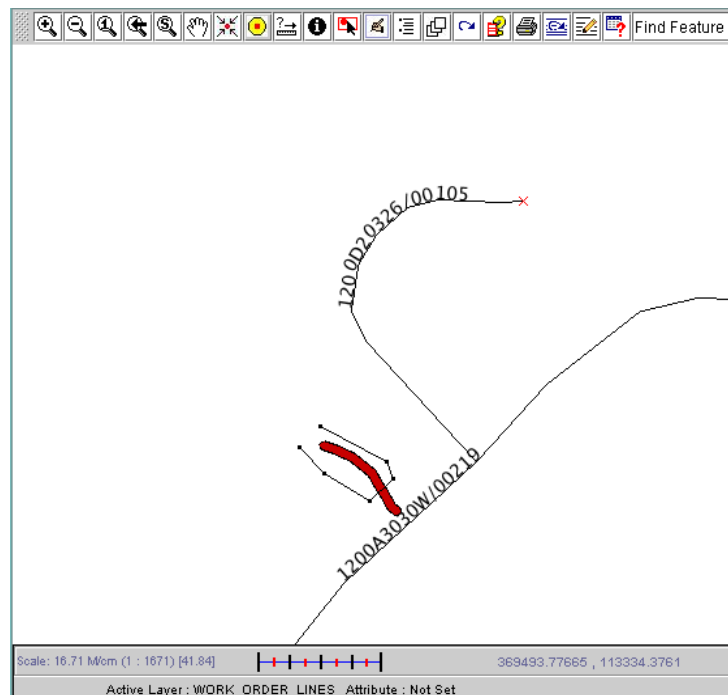
Once a Geometry Type has been selected and the [Continue] button selected, Locator will be called in Multi Point mode with the map zoomed to the current Work Order Line shape.



To define the new shape for the Work Order Line select "Send Multiple Points to application" from the "Feature Edit Menu" button in the Map as shown below

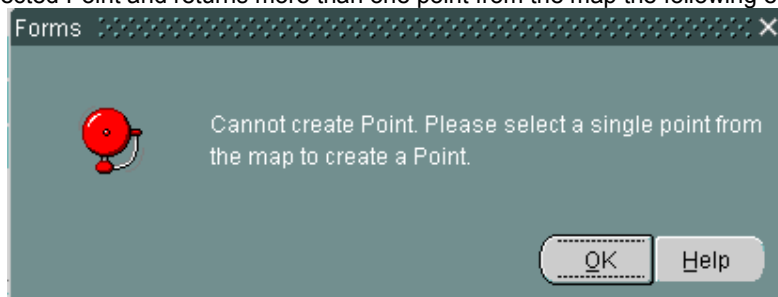


To return a point shape, just double click the Map at the desired point.  
To return a Line or a Polygon click the required points on the map, remembering to double click the last point.

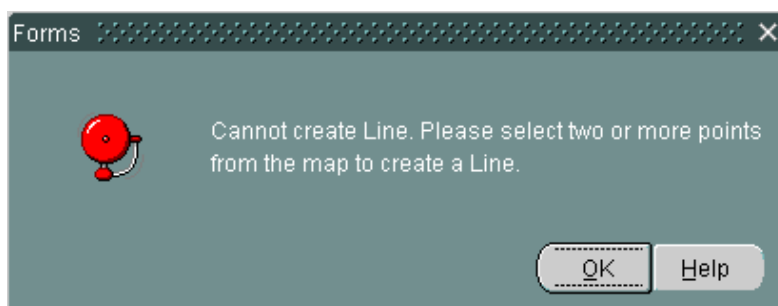


Once a double click is detected by the map the point(s) will be returned to mai3800.  
If the user has returned points that do not match the selected Geometry Type and error will be raised and the Work Order Line shape will not be updated, for example:-

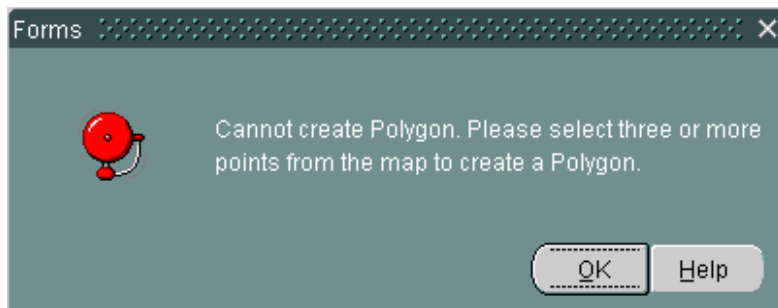
If the user selected Point and returns more than one point from the map the following error will be raised.



If the user selects Line and only returns one point from the map the following error will be raised.

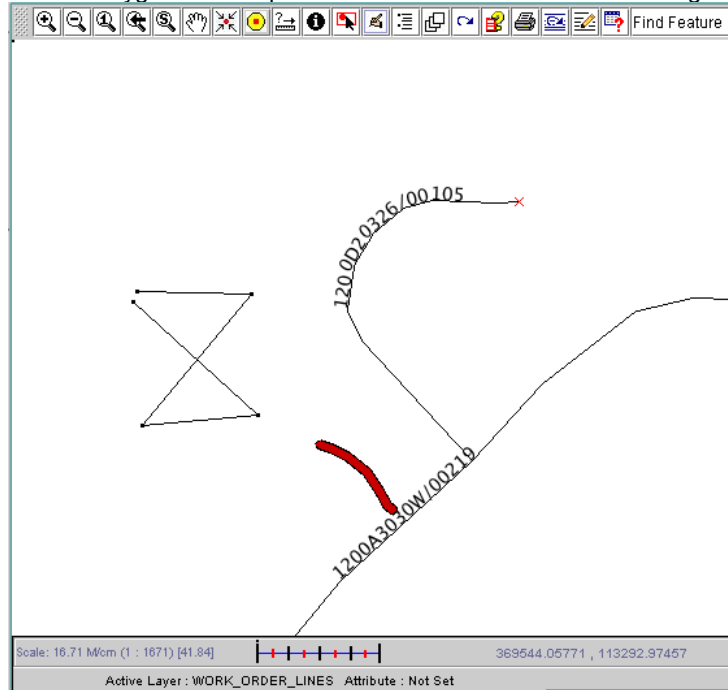


If the User selects Polygon and returns less than 3 points from the map the following error will be raised.






Finally if the user selects Polygon and the points returned lead to a self intersecting Polygon, for example:-

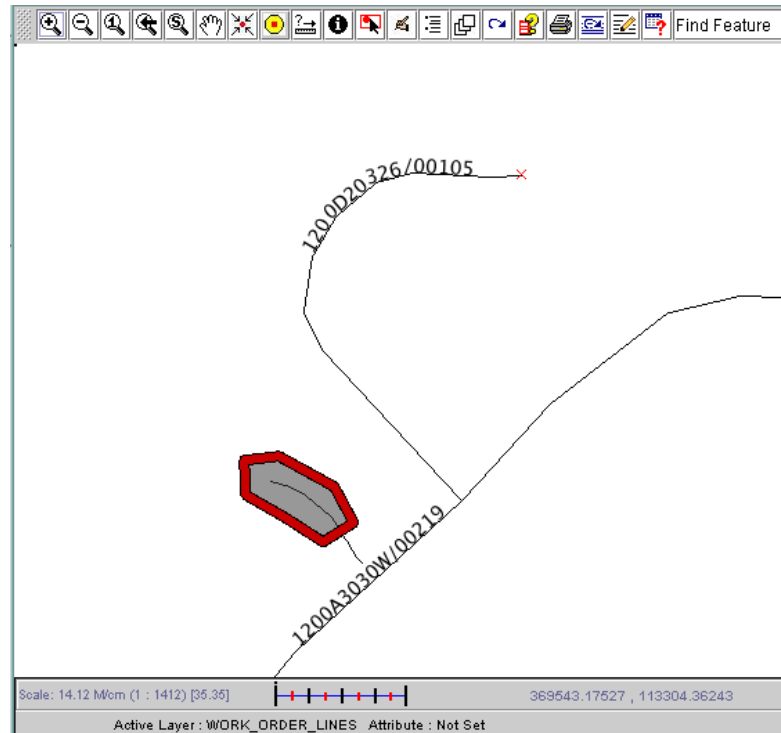


Then the following error will be raised.




If no errors are raised by the form then the new shape has been generated and updated in the shape table. **However it has not yet been committed.** To save the changes the user must select [Save]

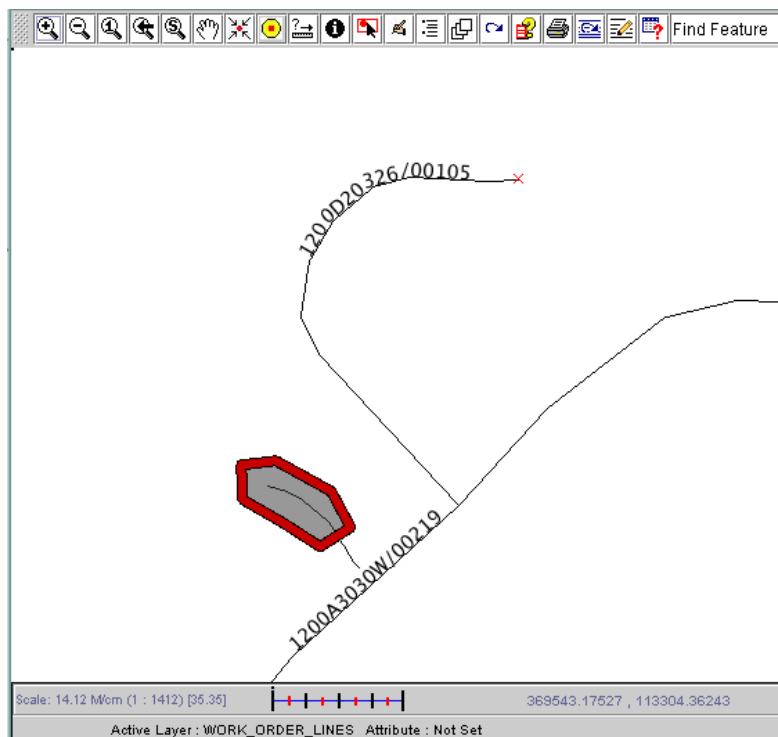
Once the change has been committed the new shape can be viewed in the usual fashion i.e. by pressing the Map button. 



**Note.**

When the system has been unable to generate a default shape for the Work Order Line (for example the WOL is for a Group Of Groups) the [Get From Map] button will still work but will not zoom when initially called. It is up to the User to locate the area in which the work is to be carried out and then use "Send Multiple Points to application" from the "Feature Edit Menu" button to create a shape for the Work Order Line.

Once the change has been committed the new shape can be viewed in the usual fashion i.e. by pressing the Map button. 



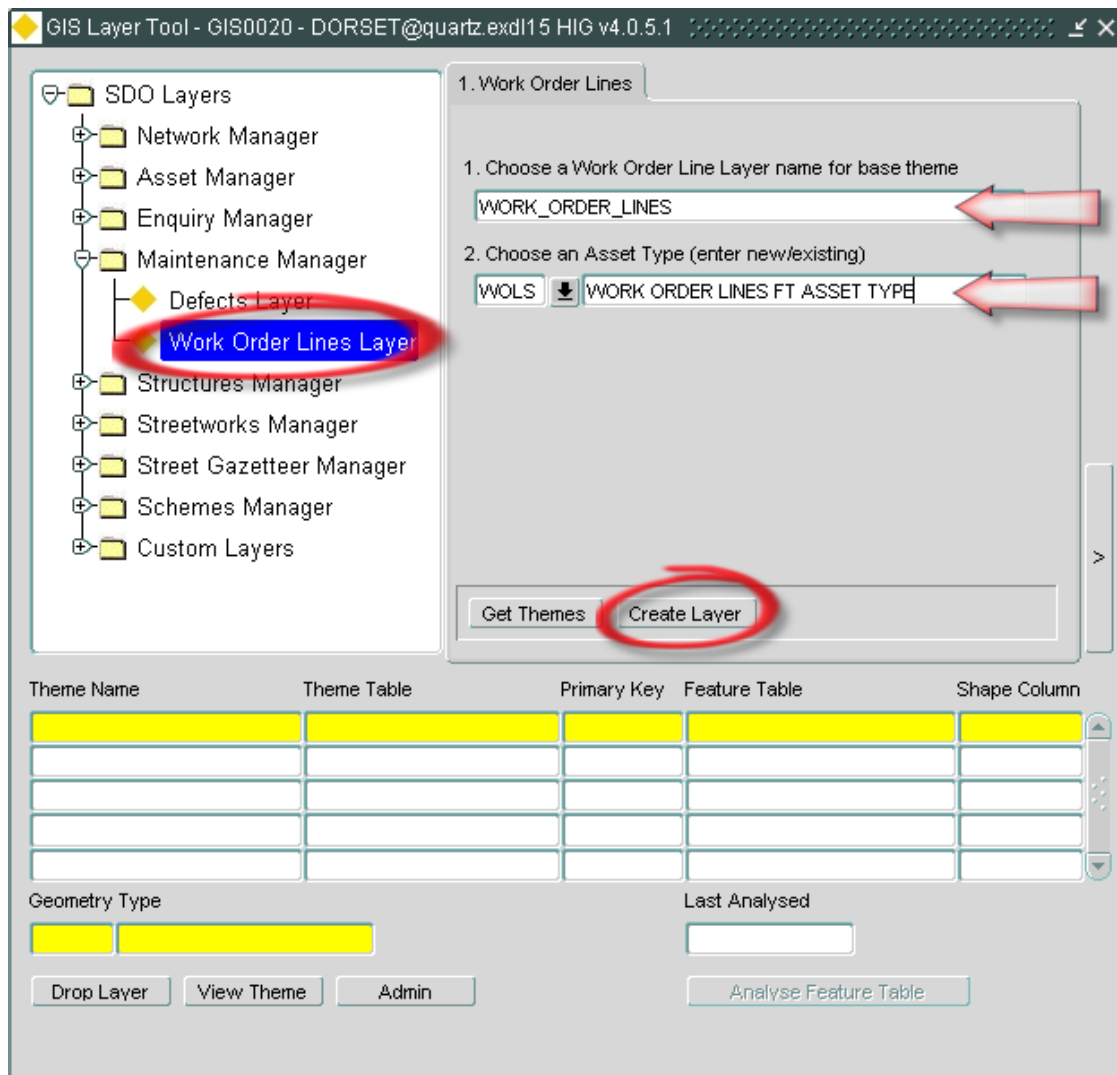
## Spatial Representation of Work Order Lines.

### General Information

In order to store a spatial representation of a Work Order Line a new standard set of Work Order Lines themes have been coded. GIS0020 should be used to create these Standard Themes.

To create the themes:-

- 1) Select "Work Order Lines Layer" in the SDO Layer tree on the left hand side of the form.
- 2) Enter a name for the Layer, for example WORK\_ORDER\_LINES.
- 3) Enter a code and name for the Foreign Table Asset Type that will be created to allow the user to search for Work Order Lines in Locator, for example "WOLS" and "Work Order Lines FT Asset Type".
- 4) Press the "Create layer" button to create the Layer.



GIS Layer Tool - GIS0020 - DORSET@quartz.exd115 HIG v4.0.5.1

SDO Layers

- Network Manager
- Asset Manager
- Enquiry Manager
- Maintenance Manager
  - Defects Layer
  - Work Order Lines Layer**
- Structures Manager
- Streetworks Manager
- Street Gazetteer Manager
- Schemes Manager
- Custom Layers

1. Work Order Lines

1. Choose a Work Order Line Layer name for base theme  
WORK\_ORDER\_LINES

2. Choose an Asset Type (enter new/existing)  
WOLS WORK ORDER LINES FT ASSET TYPE

Get Themes Create Layer

| Theme Name | Theme Table | Primary Key | Feature Table | Shape Column |
|------------|-------------|-------------|---------------|--------------|
|            |             |             |               |              |
|            |             |             |               |              |
|            |             |             |               |              |
|            |             |             |               |              |
|            |             |             |               |              |

Geometry Type  
Last Analysed

Drop Layer View Theme Admin Analyse Feature Table

The creation of the Layer will take a few minutes as it sets up the Themes and generates shapes for existing Work Order Lines.

Note.

The automatic generation of shapes for existing Work Order Lines excludes the following Status Codes (based on the Status Code feature flags).

- COMPLETED
- HELD
- NOT DONE
- PAID
- ACTIONED

Once the Layer has been created, two themes should be displayed in the lower portion of the form:-

GIS Layer Tool - GIS0020 - DORSET@quartz.exdl15 HIG v4.0.5.1

SDO Layers

- Network Manager
- Asset Manager
- Enquiry Manager
- Maintenance Manager
  - Defects Layer
  - Work Order Lines Layer**
- Structures Manager
- Streetworks Manager
- Street Gazetteer Manager
- Schemes Manager
- Custom Layers

1. Work Order Lines

1. Choose a Work Order Line Layer name for base theme

2. Choose an Asset Type (enter new/existing)

| Theme Name           | Theme Table        | Primary Key | Feature Table          | Shape Column |
|----------------------|--------------------|-------------|------------------------|--------------|
| WORK_ORDER_LINES_TAB | WORK_ORDER_LINES   | WVOL_ID     | WORK_ORDER_LINES_SDO   | GEOLOC       |
| WORK_ORDER_LINES     | V_WORK_ORDER_LINES | WVOL_ID     | V_WORK_ORDER_LINES_SDC | GEOLOC       |
|                      |                    |             |                        |              |
|                      |                    |             |                        |              |
|                      |                    |             |                        |              |

Geometry Type

Last Analysed

Once the Work Order Lines layer has been created any new Work Order Lines should have a default shape generated for them when they are committed. The following logic determines what shape will be generated:-

1. If it's a Defect Work Order Line generate shape from the Defect details
  - If the Defect has x,y co-ordinates then use them to create a point
  - Otherwise if the Defect has a Section and chainage then use them to create a point
  - Otherwise use the whole shape for the Section that the Defect is on.
2. Otherwise use the Element on the Work Order Line to generate the shape
  - If the Element is a Group Of Sections then get the group shape
  - If the Element is a Section get the section shape

**Note.**

Where the Work Order Line is NOT for a Defect the creation of a default shape will occur for a Datum Element or a Group Of Datum Elements. Therefore no default shape will be created for Lines where the Element is a Group Of Groups, this includes Groups Of Sections on a conflated network as the Section is itself a group of ESU's.

## 4 Log No. Summary

This chapter summarises all Software Bugs and Changes that have been made in this release. These changes are derived from Customer raised issues

| Support Reference | Module  | Issue   |
|-------------------|---------|---|
| 716756            | MAI3852 | Validation problem on Works Orders where completion date is after instructed date |
| 718882            | MAI3854 | Resolves intermittent processing of WC files                                      |
| 714910            | MAI3807 | Sub-ordinate user validation against admin units                                  |
| 715703            | MAI3802 | Addresses Complete W.O. button being grayed out                                   |
| 717011            | MAI2250 | Boiler text obscured  |
| 713521            | MAI2315 | Section Range field not talking to Print Inventory items                          |
| 704206            | MAI2325 | Errors when using Print Inventory Report  |
| 700858            | MAI2470 | Incorrect activity associated with a defect on a PEM                              |
| 710853            | MAI2790 | Spurious error message when running MAI2790 report                                |
| 710102            | MAI3485 | Error when running report   |
| 700268            | MAI3800 | Spurious error messages after changing BoQs                                       |
| 712737            | MAI3800 | WOR_Priority domain issues resolved   |
| 714140            | MAI3800 | Moving quickly between repairs on Defect form                                     |
| 718161            | MAI3800 | Validation on copying an authorized Works Order                                   |
| 715072            | MAI3800 | Copying Work Order amended no longer transfers authorisation                      |
| 715126            | MAI3800 | Work Categories LoV description truncated   |
| 715859            | MAI3802 | Contractor unable to see rates and costs  |
| 708231            | MAI3806 | Defect Detail button not working  |
| 712453            | MAI3806 | Sub users are unable to query on dates  |
| 715212            | MAI3806 | Problems with wildcard searches in Defects form                                   |
| 716082            | MAI3806 | Admin unit validation on defects in Works Orders                                  |
| 717432            | MAI3808 | Issues with querying back road sections with an initiation type that is end-dated |
| 711592            | MAI3862 | End dated sections showing in schedule  |
| 713267            | MAI3863 | Restriction on full list of active organisations recorded in MAI1870              |
| 703400            | MAI3899 | Issues retaining defect on Inspections by Group form                              |
| 717935            | MAI3904 | Report layout – Bold Defect ID and Road Name                                      |
| 716903            | MAI3942 | Adds column width to Works Order sheet reference                                  |
| 711788            | MAI7040 | Ordering in PBI reports   |
| 707479            | MAI3899 | Inspection form ID sequence issues  |
| 716088            | MAI3907 | Print Cyclic Work Order sequencing  |