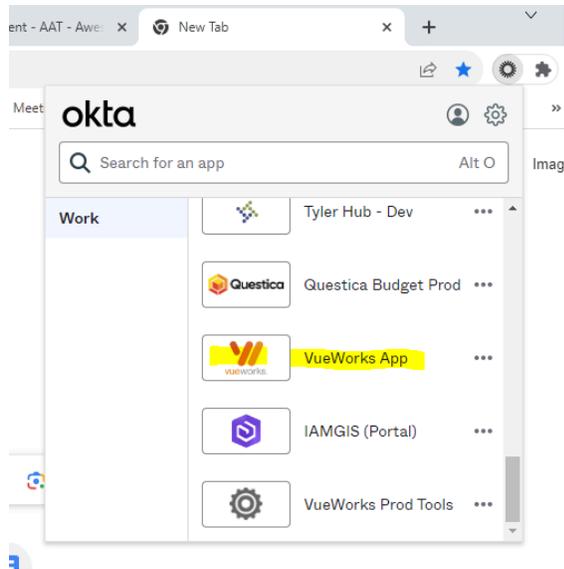


**Larimer County Work Order Standard
Infrastructure Asset Management Process
Guide**

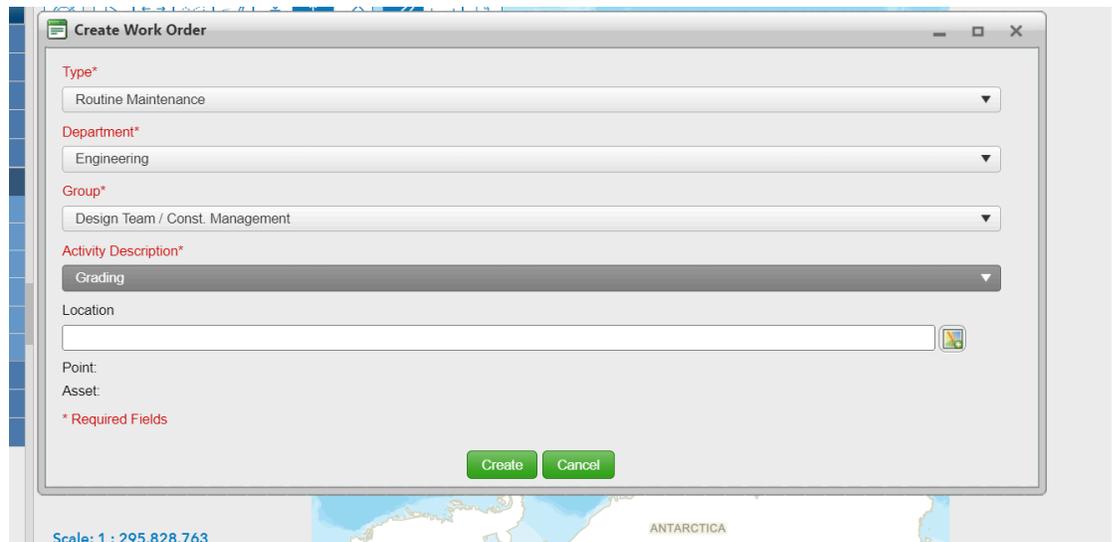
Open Okta and select VueWorks.



To create a work order please select Work Orders on the left side of the page.



Select Add New Work Order – Fill out the drop-down fields to match the work required then click 'Create'

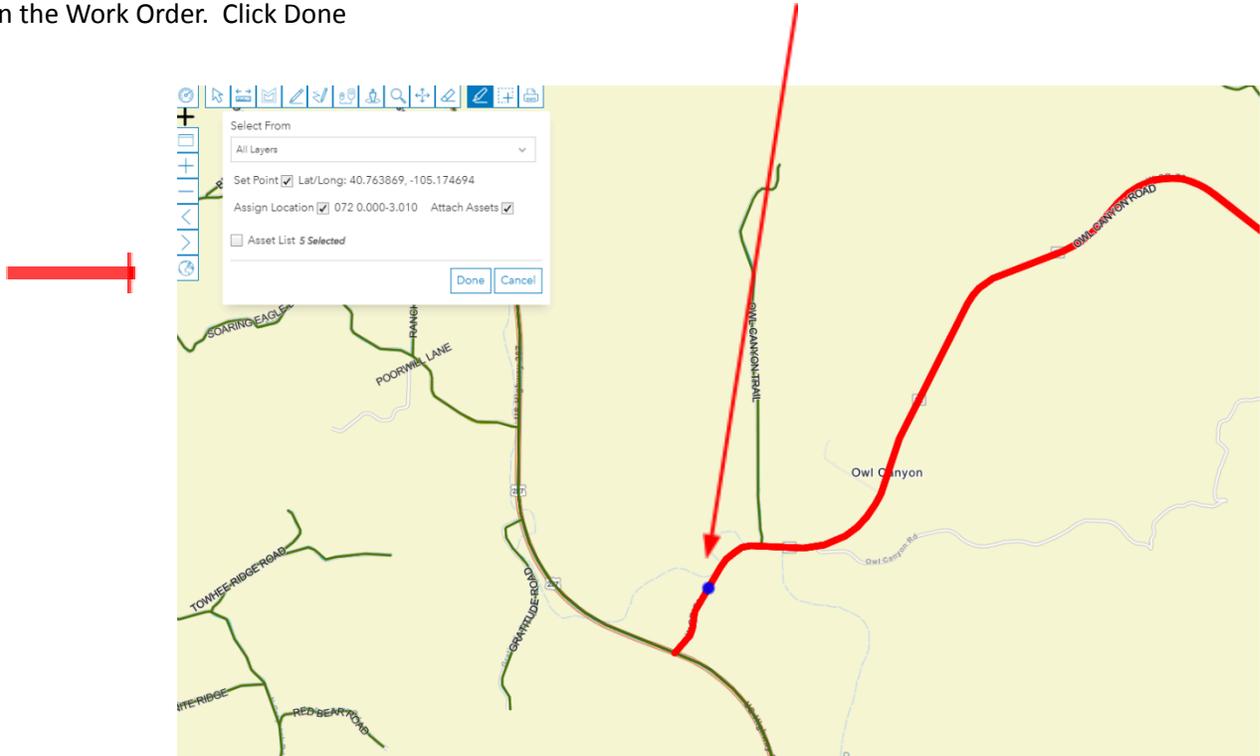


Select the map icon next to the Location field. This will open your map.

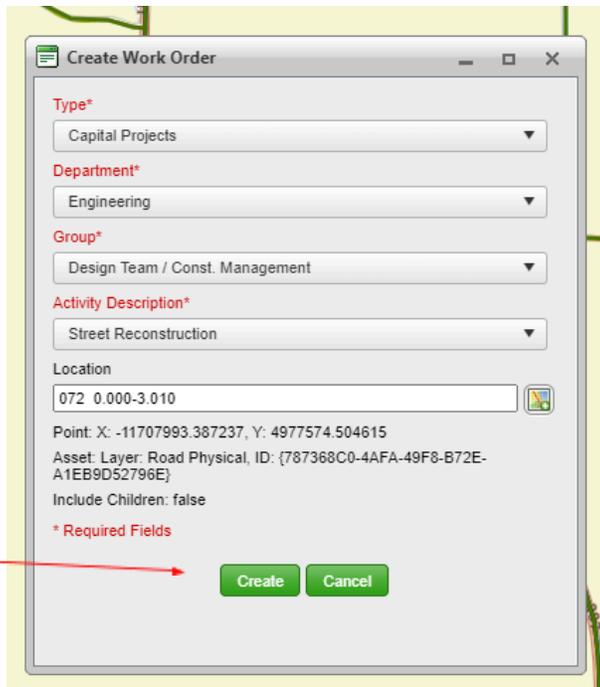


Make sure the layer that you are wanting to view has been selected and the asset has been created.

You will have to zoom in far to be able to select an asset. Click on the asset you want. This will populate on the Work Order. Click Done



You will notice that the location field is now populated.



Click Create

Manage Work Orders

ter Status - Select Field - Apply Filter

Form View Table View Filter Reports Assets

101923001 Logged By Katherine Beilby 10/19/2023 03:31 PM

Type Capital Projects
 Department Engineering
 Group Design Team / Const. Management

Activity Description Street Reconstruction
 Location 072 0.000-3.010 Lat/Long 40.763869, -105.174694
 Description Street Reconstruction
 Assigned To [Blank] Role: Construction 10/19/2023 3:31 PM

Status Open Priority High
 Begin Date 10/03/2023 8:00 AM
 End Date 12/31/2023 9:00 AM
 Due Date [Blank]

Send Email to Notification List on Save
 Set Recurring

Details Workflow Costs Tasks Labor Equipment Inventory Assets Documents Work Orders Comments

Fill out the **Description**, **Priority** and **Term Dates**. *The due date can be left blank. The Description must start with Project number if applicable.*

Once that is complete, you can move on to finish the Work Order details. If this is a part of a project, you will associate it with that project.

Description PN 8510 - seed and mulch areas in Bluffs PID and Bonnell West PID

Assigned To Katherine Beilby 03/05/2024 12:34 PM

Project Group: PID Project: 8510 - PID Overlay - Bonn...

Associate with...

Fill out highlighted areas. (addendum only if it is a change order, see addendum instructions)

Quick Tip is to click the arrow pointing up to make the bottom screen larger.

ID: 030124001 Engineering Engineering Group: Admin Activity Description: Engineering Services - Consultant Status: Open State: Open

Details Workflow Costs Tasks Labor Equipment Inventory Assets Documents Work Orders Comments

Parent PO Number P002162 Child PO Number P002271 Addendum [Blank] Addendum Date [Blank]

Project Manager Mark Peterson Funding Source Engineering 600...

Requesting Department Engineering Vendor Felsburg Holt & Ullevig

Fee Type Maximum Fee Not to Exceed (Time & Reimbursable) Contract Administrator Name & Email Jenny Young jenny.young@fhueng.com

Fee 436480.00

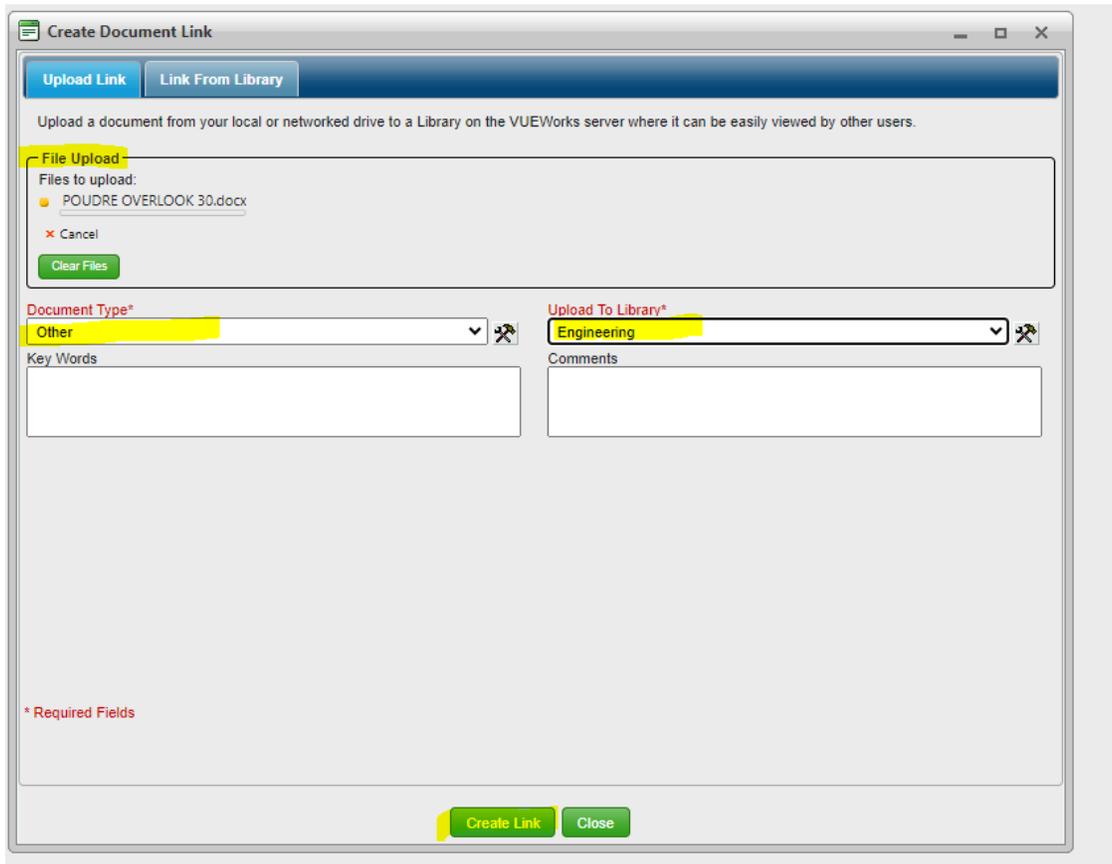
Approval Signature Mark R Peterson Title County Engineer Date 03/01/2024

Project Description and Scope
 Professional services for an updated Larimer County Transportation Master Plan and an update to the County's transportation capital expansion fee program and described in the letter proposal and fee proposal from Felsburg, Holt & Ullevig (FHU) dated February 29, 2024. Work on the capital expansion fee study will be conducted by Dwayne Guthrie as a subconsultant to FHU and costs are included in the total scope and fee proposal as Task 11.

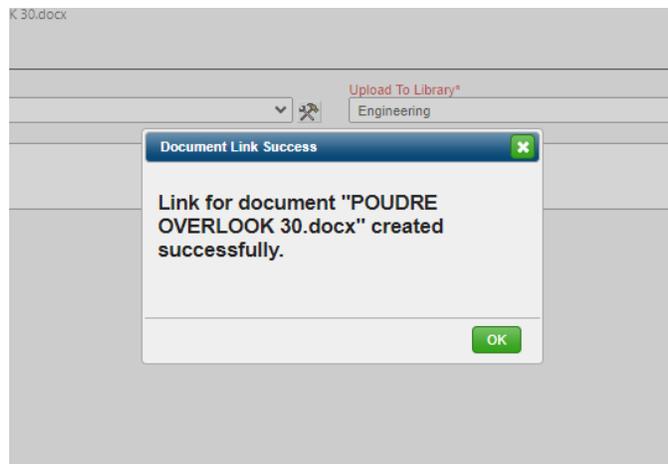
Under the Documents tab, you will upload the Scope of Work from the Contractor.



Click browse to find and select file to upload. File type must be a PDF.



This will pop up if the document is attached..



Then go to the **workflow tab** to submit the Work Order to begin the approval process.

Manage Work Orders

Filter Status: - Select Field - Apply Filter

Form View Table View Filter Reports Assets

ID: 032623002 Department: Engineering Group: Design Team / Const. Management Activity Description: Grading Status: Open State: Open

Details Workflow Costs Tasks Labor Equipment Inventory Assets Documents Work Orders Comments

Step Action: Leadership Assignment

Please sign and approve | 24 of 1024

Complete

Workflow Steps

- Leadership Assignment (Active Step)
- Leadership Approval
- ENG Admin PO Creation

* Required † To Close

Save Delete New Copy New Print... Close

This step will trigger the flow to the Director or Assistant Director for approval. They will receive an email then login to sign the Approval Signature on the details tab, then hit complete on the Workflow tab.

Approval Signature

Title

Date

Project Description and Scope

Details Workflow Costs Tasks Labor Equipment Inventory Assets Documents Work Orders Comments

Step Action: Leadership Assignment

Please sign and approve | 24 of 1024

Complete

Workflow Steps

- Leadership Assignment (Active Step)
- Leadership Approval
- ENG Admin PO Creation

The Work Order will then go to the Admin Team for creation of the Purchase Order.

Purchase Order is created in FRAN. This may take 1-2 business days to complete.

Once that step has been completed by Admin in FRAN, A will go into the Work Order in VueWorks and add the Child PO Number into the Work Order.

Parent PO Number: P0123456
Child PO Number: P0000000
Addendum: [Dropdown]
Addendum Date: [Calendar]
Project Manager: Matt Johnson
Project Number: EN1234
PID: No
Requesting Department: [Dropdown]
Fee Type: Maximum Fee Not to Exceed (Time & Reimbursable)
Fee: 50000
Approval Signature: Da Boss
Title: County Engineer
Date: 03/26/2023
Project Description and Scope: This is maintenance on a BIG, BIG project..
Required * To Close
Buttons: Save, Delete, New Copy, New, Print..., Close

The Work Order will then be routed back to the Project Manager to print and send to the contractor for their records.

When the work is complete, the Project Manager will update the status. This is important as it will send an email to everyone on the notification list. Admin will be added to this list, so admin will know to close the PO.

Manage Work Orders
Filter Status
Form View Assets
ID 101923001 Logged By Katherine Belby 10/19/2023 03:31 PM
Type: Capital Projects
Department: Engineering
Group: Design Team / Const. Management
Activity Description: Street Reconstruction
Location: 072 0.000-3.010 Lat/Long 40.763869, -105.174694
Assigned To: Role: Construction 10/19/2023 3:31 PM
Status: Closed
Priority: Medium
Begin Date: 10/16/2023 8:00 AM
End Date: 12/28/2023 9:00 AM
Due Date: [Calendar]
Send Email to Notification List on Save
Set Recurring
Details Workflow Costs Tasks Labor Equipment Inventory Assets Documents Work Orders Comments

**As a reminder contractors/vendors do not need to sign the Work Order as the Scope of Work submitted to the Project Manager is sufficient.

**The PO will be attached to Documents

Print the PO to PDF to send to the vendor. Select the attachments you would like to send as well.

PO

Scope of work

Work Order

Manage Work Orders

Filter is OFF - Current list contains 197 out of 219 Work Orders

ID: 121223023 Engineering Engineering Group: Admin Activity Description: Engineering Services - Consultant Status: Open State: Open

Parent PO Number: P0054321 Child PO Number: P0012345 Addendum: Addendum B Addendum Date: 04/17/2023

Project Manager: Matt Johnson PID:

Requesting Department: Engineering Vendor: Short Elliott & Hendrickson Inc

Fee Type: Fixed Fee to be Paid on the Basis of Percent Compl Fee: 25000

* Required To Save
‡ Required To Close

Save Delete New Copy New Print... Close 20 of 197

Print Work Order Form

Select Report Template*

Form Reports

Work Order with Details

Title: Work Order with Details

Select other items to print (optional)

Asset Attributes Condition Form

Linked Work Orders Current Map View

Insert page break between Work Orders

Documents

Documents linked to attached Assets Documents linked to Work Order

X	Type
<input checked="" type="checkbox"/>	Other

Files of type TIF, JPG, JPEG, PNG, and PDF will be printed for the types selected.
Some PDF files may be opened in their own window.

Print Close

The PDF will pop up and you can download then send it to the vendor.

If you select the documents to attach, you will notice it auto merges the documents.

You see how it says 1 of 5 pages? That means that attachments are all there

Work Order with Details

ID	121223023	Logged By	Katherine Beilby	12/12/2023 10:01 AM	Status	Open	Priority	Medium
Service Request		Type	Capital Projects	Begin Date / Time	End Date / Time			
		Department	Engineering	12/12/2023 08:00 AM	12/12/2023 09:00 AM			
Activity Description	Group		Admin	Due Date / Time				
Engineering Services - Consultant								
Location								
Assigned To	Morgan Fay			12/12/2023 10:37 AM				
Description	Please let me know if you get this. Thanks.							

Parent PO Number	Child PO Number	Addendum	Addendum Date
P0054321	P0012345	Addendum B	04/17/2023

Project Manager: PID

This will be sent out to the vendor via the PM in an email.

Addendum Guide

Open your original work order.

Go to the workflow tab and click 'Create Amendment' then close that work order.

Step Action: Create Amendment

Enter your comments... 0 of 1024

Workflow Steps

- ✓ Leadership Assignment
Completed On: 12/17/2024 12:25:44 PM Completed By: Katherine Beilby [More](#)
- ✓ Leadership Approval
Completed On: 12/17/2024 12:25:47 PM Completed By: Katherine Beilby [More](#)
- ✓ ENG Admin PO Creation
Completed On: 12/17/2024 12:25:49 PM Completed By: Katherine Beilby [More](#)
- Create Amendment
Active Step

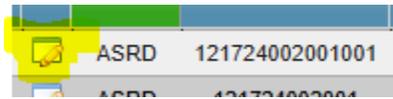
To open the Addendum, go to 'Find/Manage/Report' then click the tab 'Table View'. It should be along the top and will have a '001' at the end of the original Work Order number. (may be 002 or 003 depending on how many amendments there are')

Form View **Table View** Filter Reports Assets

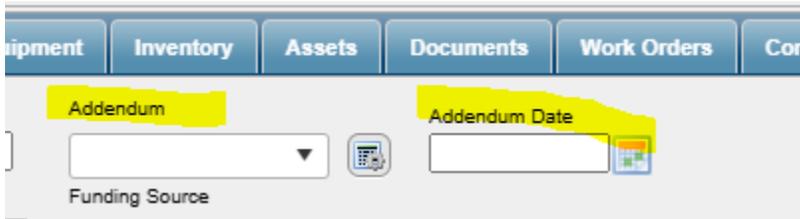
Calendar 1 of 50

	OPS	ID	Status	Assigned To	Logged By	Log Date
1	ASRD	121724002001001	Open	ENG Director	Katherine Beilby	12/17/2024 10:29 AM
2	ASRD	121724002001	Open	ENG Admin	Katherine Beilby	12/17/2024 09:57 AM

Click the calendar button to the left to open.



The only difference is you will fill out the addendum portion, any empty fields (including \$ amount) and attach a new scope of work.



To forward for approval, please click the tab Workflow, and complete the step here.

