

# The Survey Work Order Module

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## The Survey Work Order Module

The Survey Work Order module allows users to create and track Survey Work Orders from creation to delivery. Survey Work Order may contain surveys of type Utility, Right Of Way/Parcel Staking, Aerial Photography or Design Survey.

The PSEE Survey Work Order Module can handle Survey Work Orders from two perspectives:

- Survey Work Orders that **need to be** completed
- Survey Work Orders that **have already been** completed

Users with Survey Work Orders that need to be completed can **enter and submit** their Survey Work Orders using PSEE. Users can document all involved staff (Survey Supervisor, Crews/Crew Supervisors and Reviewers), identify dates and specifications for the Surveys. These users will **Submit** their Survey Work Orders within PSEE. Submitting the Survey Work Order triggers notifications which let involved parties know that there is a Survey Work Order to be done. Involved parties can then read the Survey Work Order details, enter appropriate dates and finally include the completed surveys.

Users wishing to simply document that a Survey **has already been completed**, can document information about the Survey, but not utilize the workflow portion of PSEE. Users can document a minimal (or expanded) amount of data (including the involved staff, specifications, dates and resulting documents) to record the facts related to a Survey Work Order that has already been completed. These users will enter the data and mark their Survey Work Order as **Complete**. Marking the Survey Work Order as Complete, instead of Submitting it, will skip the notifications to participants and simply include the Survey Work Order in PSEE for future reference, searching and reporting.

Users must be granted access/privilege to the Survey Work Order module to Create Survey Work Orders. User can complete all other actions described in this User Manual depending on role associated with Survey Work Order. If you do not have access, and feel you should, contact your PSEE District Administrator. They are listed in the footer of every PSEE page.

Select the Survey Work Order module from the Module Menu. The module will be displayed.

The screenshot shows the ProjectSuite Enterprise Edition interface. At the top, the user is identified as RYAN PATTERSON. The main navigation bar includes links for Project, Search, My Assignments, My Journal, User Profile, and Help. On the left, a 'Module Menu' is visible with several options: Address Book, Commitments, Design Approval Requests, Environment, Permits, Project Status, Survey Work Order (which is checked and highlighted with a red box), and Contracts. The main content area displays 'Project Info [419305-1]' and 'Survey Work Order (Click to collapse)'. Below this, a table lists survey work orders:

Work Order Number	Requested By	Summary	Complete Date (A=Actual)	Delivery Date (A=Actual)	Work Order Due Date	Status
<a href="#">View</a> 419305-1-3	ASHLEY BROWN	Aerials for First Section			4/28/2011	Open <a href="#">[Remove]</a>

Below the table, there is a link to [\[Add Survey Work Order\]](#).

## Creating a Survey Work Order

1. Select the **Add Survey Work Order** link. A new window will appear.

This screenshot is similar to the previous one, but the 'Add Survey Work Order' link at the bottom of the table is highlighted with a red box. The rest of the interface, including the Module Menu and the table content, remains the same.

2. Enter the details in the displayed window.

**Add Survey Work Order**

Requested By:  [\[Show all users\]](#)

Request Date:

Level of Request:

Summary:

Description:  0 of 2000

Geographic Location:  0 of 2000

Survey Supervisor:  [\[Show all users\]](#)

Related Surveys:

- Utility Survey
- Right Of Way / Staking Survey
- Aerial Survey
- Design Survey

Work Order Due Date:

Estimated Complete Date:  Estimated Delivery Date:

Supervisor Approve Date:  Supervisor Review Complete Date:

Complete Date:  Delivery Date:

- **Requested By [Required to Open or Complete, but not for Draft]:** Identify the Internal person requesting the Survey Work Order. Begin typing the first and/or last name of the Internal User. A list of matching names will appear. Select the name of the Requested By person.

Requested By:

Request Date:

Level of Request:

Summary:

Description:

Geographic Location:

- **Request Date [Required to Open or Complete, but not for Draft]:** Identify the date the Survey Work Order is being requested.

The screenshot shows a web form titled "Add Survey Work Order". The "Requested Date" field is populated with "4/8/2011". A calendar dropdown menu is open, showing the month of April 2011. The date "8" is highlighted in blue, indicating it is the selected date. The calendar shows days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 30. The text "Today: April 29, 2011" is visible at the bottom of the calendar.

- **Level of Request [Required]:** Choose the appropriate Level of Request from the drop down. .

The screenshot shows a dropdown menu for "Level of Request". The menu is open, displaying the following options: "Other Request Level", "Request Level 1", "Request Level 2", "Request Level 3", and "Request Level 4". The "Request Level 1" option is currently selected and highlighted in blue.

- **Request Level 1:** Check sections for cross slope at 1000 feet in tangents. For curves, check 50 feet before PC, at PC, 50 and 100 feet after PC and at middle of curve or 300 foot intervals. (Reverse at PT).
- **Request Level 2:** Minor spot improvements such as turn lane at existing crossover, turn lane on 2-lane, etc. Level 1 required throughout other portions of project. Cross section level to be determined by Project Manager/Designer with input from the District Location Surveyor and Resident Engineer. TOPO with supplemental elevations in area of improvement. Reference control points outside R/W. Subsurface utility locates if required.
- **Request Level 3:** Continuous improvements through length of project such as widening and/or paved shoulder; or major spot improvements (structure replacement; major intersection improvement). May require Right of Way purchase. TOPO with supplemental elevations (limits to be determined). Digital Terrain Model (DTM) at specified locations. Subsurface utility locates.
- **Request Level 4:** Full Digital Terrain Model (DTM) and TOPO for entire project.

- **Level Description [Required if Level of Request is "Other Request Level"]:** Description for the Other Request Level

The screenshot shows a web form titled "Add Survey Work Order". It contains the following fields:

- Requested By:** A text box containing "PATTERSON, RYAN (RD352RP)" and a link "[Show all users]".
- Requested Date:** A date picker box showing "4/8/2011".
- Level of Request:** A dropdown menu with "Other Request Level" selected.
- Level Description:** A large text area containing "Topography at blow out" with a character count of "22 of 255".

- **Summary [Required]:** Enter a descriptive short summary of the Survey Work Order. This short summary will appear on all lists of Survey Work Orders shown in PSEE.
- **Description [Required to Open or Complete, but not for Draft]:** Enter a full description of the Survey Work Order.

The screenshot shows the same "Add Survey Work Order" form, but with additional fields filled out:

- Requested By:** "PATTERSON, RYAN (RD352RP)" [Show all users]
- Requested Date:** "4/8/2011"
- Level of Request:** "Other Request Level" (dropdown)
- Level Description:** "Topography at blow out" (22 of 255)
- Summary:** "Elevation/Station/Offset Outfall" (text box)
- Description:** "We need the elevation & station/offset of the outfall. Topography around the blow out. Need baseline info." (106 of 2000)

- **Geographic Location [Optional]:** Enter a summary of the Geographic Location related to the Survey Work Order.

Geographic Location:	13 of 2000
<input type="text" value="Mile Marker 5"/>	

- **Survey Supervisor [Required to Open or Complete, but not for Draft]:** Identify the FDOT Staff person that will supervise the Survey Work Order. The Survey Supervisor is responsible for ensuring that the Survey Work Order is completed according to the technical specifications requested, while following the

processes established for their District for handling Survey Work Orders.

Survey Supervisor:  [\[Show all users\]](#)

Related Surveys:

- BARBEE, DEBORAH (RW355DB)
- BARBEE, JEFF (MT310JB)
- BARBER, LONNIE (RD352BD)
- BARBER, WILLIAM (RD352BW)
- HAYDEN, BARBARA (MT395B)
- LEE, BARBARA (PL330BL)
- PETTIS, BARBIE (RW355PB)
- STRICKLAND, BARBARA (FI322BS)

Work Order Due Date:

- **Related Surveys [Required to Open or Complete, but not for Draft]:** Select the types of Surveys that will be completed as a part of the Survey Work Order.

Survey Supervisor:  [\[Show all users\]](#)

Related Surveys:

- Utility Survey
- Right Of Way / Staking Survey
- Aerial Survey
- Design Survey

- **Work Order Due Date [Optional]:** Enter the date that the Survey Work Order should be finalized. Establishing a Due Date will help inform others working on the Survey Work Order of your time expectations.

Work Order Due Date:

Supervisor Approved Date:

Estimated Completed Date:

Actual Completed Date:

Supervisor Review Completed Date:

Estimated Delivery Date:

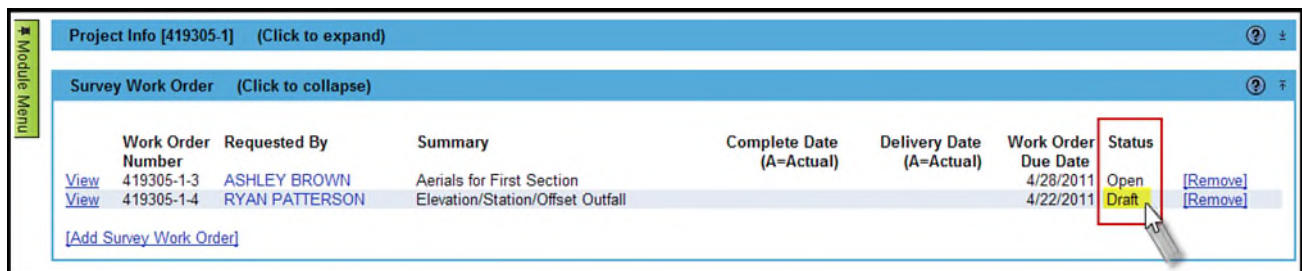
Actual Delivery Date:

[Desk](#)

- **Estimated Complete Date [Optional]:** Enter the approximate date that the Survey Work Order would be completed. This field should most likely be completed by the Survey Supervisor if the Survey Work Order is being processed in PSEE. If a Survey Work Order has already been completed and is being documented in PSEE for reference, this field may not need to be entered.
- **Estimated Delivery Date [Optional]:** Enter the approximate date that the Survey Work Order would be delivered. This field should most likely be completed by the Survey Supervisor if the Survey Work Order

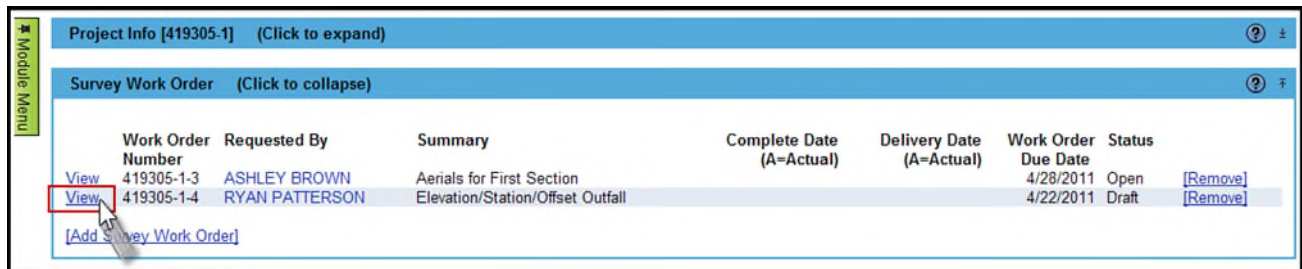
is being processed in PSEE. If a Survey Work Order has already been completed and is being documented in PSEE for reference, this field may not need to be entered.

- **Supervisor Approve Date [Optional]:** Enter the date that the Survey Work Order was approved by the Survey Supervisor. This field should most likely be completed by the Survey Supervisor if the Survey Work Order is being processed in PSEE.
  - **Supervisor Review Complete Date [Optional]:** Enter the date that the Survey Supervisor completed this Survey Work Order.
  - **Complete Date [Optional]:** Enter the date that the Survey Work Order was completed.
  - **Delivery Date [Optional]:** Enter the date that the Survey Work Order documents were delivered to the Requestor.
3. Select **Save** when all information is entered.
  4. You are returned to the Survey Work Order screen. The Survey Work Order is displayed in the list. **Note that the Survey Work Order is in a Draft Status. The request has not yet been submitted, and Survey staff has not been notified of the request.**



## Viewing a Survey Work Order and Documenting Additional Details

1. Select **View** to see all details, and add additional details, to the Survey Work Order.



2. The top section of the screen includes the information that was entered when the Survey Work Order was created. This information can be changed by selecting the **Edit** hyperlink. The middle sections of the screen display the Review Assignments and Crew Assignments that are required. The assignees are not notified until the request is "Opened". These can be updated to include instructions to the Reviewers or Crew Supervisor. The bottom section of the screen includes areas where you may document additional

information related to the request including: Internal Contact, External Contacts, Notes and Documents related to this Survey Work Order.

Survey Work Order (Click to collapse) ?

[Return to Survey Work Order List](#)

Detail

[\[Edit\]](#) [\[Submit\]](#) [\[Complete\]](#)

<b>Work Order Number:</b>	419305-1-4	<b>Submitted Date:</b>	
<b>Created Date:</b>	4/29/2011		
<b>Requested Date:</b>	4/8/2011		
<b>Requested By:</b>	<a href="#">RYAN PATTERSON</a>		<b>Information added when Survey Work Order was first created.</b>
<b>Level of Request:</b>	Other Request Level		
<b>Level Description:</b>	Topography at blow out		
<b>Unit of Measure:</b>	ENGLISH		
<b>Summary:</b>	Elevation/Station/Offset Outfall		
<b>Description:</b>	We need the elevation & station/offset of the outfall. Topography around the blow out. Need baseline info.		
<b>Status:</b>	Draft	<b>Status Date:</b>	4/29/2011
<b>Geographic Location:</b>	Mile Marker 5		
<b>Survey Supervisor:</b>	<a href="#">WILLIAM BARBER</a>		
<b>Related Surveys:</b>	<input type="checkbox"/> Utility Survey <input type="checkbox"/> Right Of Way / Parcel Staking Survey <input type="checkbox"/> Aerial Photography Survey <input checked="" type="checkbox"/> Design Survey <a href="#">[Add Instructions]</a>		
<b>Work Order Due Date:</b>	4/22/2011		
<b>Supervisor Approved Date:</b>		<b>Supervisor Review Completed Date:</b>	
<b>Estimated Completed Date:</b>		<b>Estimated Delivery Date:</b>	
<b>Actual Completed Date:</b>		<b>Actual Delivery Date:</b>	

Work Crew Assignments (Click to collapse)

No Work Crew assignments to display.

[\[Add Work Crew Assignment\]](#)

**Work Crew and Review Assignments**

Reviewer Assignment (Click to collapse)

Currently No Review Assignments exist for this Survey Work Order

[\[Add Review Assignment\]](#)

Internal Contacts (Click to collapse)

Currently there are no Internal Contacts set for this Project

[\[Add Internal Contact\]](#)

External Contacts (Click to collapse)

Currently there are no External Contacts set for this Project

[\[Add External Contact\]](#)

**Additional information that can be added to support the Survey Work order.**

Survey Work Order Notes (Click to collapse)

Currently No Notes exist for this Survey Work Order

[\[Add Note\]](#)

PSEE Survey Work Order Documents (Click to collapse)

No Documents Found

[\[Upload Document\]](#)

## Adding Survey Instructions

Survey Instructions are used to communicate specific details for each type of Survey selected on a Survey Work Order. For each Survey Type you have selected, the Add Instructions link will be enabled.

Survey Work Order (Click to collapse)

[Return to Survey Work Order List](#)

Detail

[\[Edit\]](#) [\[Submit\]](#) [\[Complete\]](#)

Work Order Number: 419305-1-4

Created Date: 4/29/2011 Submitted Date:

Requested Date: 4/8/2011

Requested By: [RYAN PATTERSON](#)

Level of Request: Other Request Level

Level Description: Topography at blow out

Unit of Measure: ENGLISH

Summary: Elevation/Station/Offset Outfall

Description: We need the elevation & station/offset of the outfall. Topography around the blow out. Need baseline info.

Status: Draft Status Date: 4/29/2011

Geographic Location: Mile Marker 5

Survey Supervisor: [WILLIAM BARBER](#)

Related Surveys:

- Utility Survey
- Right Of Way / Parcel Staking Survey
- Aerial Photography Survey
- Design Survey

[\[Add Instructions\]](#)

3. Select the **Add Instructions** link to the right of the selected Survey.

- 4. A new window will appear. The content in the window will vary depending on the Survey Type. Enter the details as needed to document the instructions for the Survey. Selecting **Yes** on the various options will expand additional fields to provide specific details for that option.

**Add Design Survey Instructions**

Estimated Delivery Date:  Review Assigned Date:   
Delivered Date:  Review Completed Date:   
**Topography:**  Yes  No  
From & To:  13 of 2000  
Right & Left:  0 of 2000

Digital Terrain Model:  Yes  No  
Roadway Cross Section:  Yes  No  
Profile:  Yes  No  
Side Streets:  Yes  No  
Outfall Survey:  Yes  No  
Drainage Survey:  Yes  No  
Bridge Survey:  Yes  No  
Channel Survey:  Yes  No  
Pond Site Survey:  Yes  No  
Geotechnical Survey:  Yes  No  
Miscellaneous Survey:  Yes  No

Save Cancel

- 5. Select **Save** when all information has been documented.

- You are returned to the main screen. There is now a tab at the top of the Survey Work Order screen, next to the tab labeled Detail. This tab holds the instructions that were just added.

**Survey Work Order** (Click to collapse)

[Return to Survey Work Order List](#)

Detail **Design**

[Edit] [Submit] [Complete]

Work Order Number: 419305-1-4  
 Created Date: 4/29/2011 Submitted Date:  
 Requested Date: 4/8/2011  
 Requested By: RYAN PATTERSON  
 Level of Request: Other Request Level  
 Level Description: Topography at blow out  
 Unit of Measure: ENGLISH  
 Summary: Elevation/Station/Offset Outfall  
 Description: We need the elevation & station/offset of the outfall. Topography around the blow out. Need baseline info.  
 Status: Draft Status Date: 4/29/2011  
 Geographic Location: Mile Marker 5  
 Survey Supervisor: WILLIAM BARBER  
 Related Surveys:  
 Utility Survey  
 Right Of Way / Parcel Staking Survey  
 Aerial Photography Survey  
 Design Survey  
 Work Order Due Date: 4/22/2011

- Click the tab to view the Instructions. Select **Edit** to make changes to the instructions, or **Remove** to clear all previously entered instructions.

**Survey Work Order** (Click to collapse) ?

[Return to Survey Work Order List](#)

Detail **Design**

[Edit] [Remove]

Estimated Delivery Date: Review Assigned Date:  
 Delivered Date: Review Completed Date:

**Topography** (Click to collapse) ⌵  
 Topography: Yes  
 From & To: MM 5.3 to 7.5  
 Right & Left: Section A

**Digital Terrain Model** (Click to collapse) ⌵  
 There is currently no Digital Terrain Model selected.

**Roadway Cross Section** (Click to collapse) ⌵  
 There is currently no Roadway Cross Section selected.

**Profile** (Click to collapse) ⌵  
 There is currently no Profile selected.

**Side Streets** (Click to collapse) ⌵  
 There is currently no Side Streets selected.

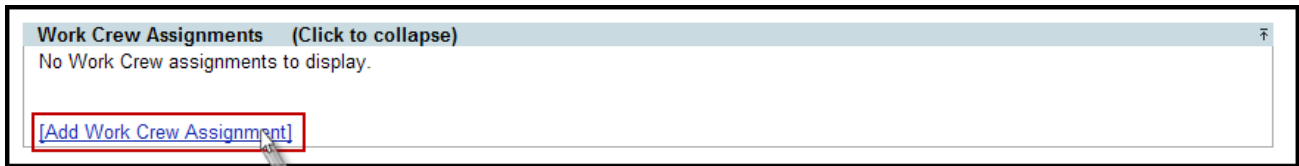
- If you **Remove** a set of instructions, all data entered will be removed, and the tab will also be removed. You will have to select **Add Instructions** again to re-create Instructions.
- Continue using the **Add Instructions** link to provide the details for all of the Survey Types selected.

## Crew Assignments

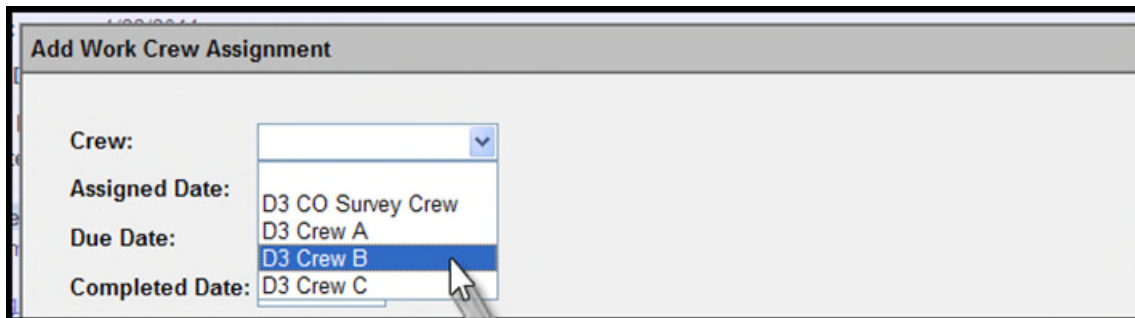
Crew Assignments can be created to assign the survey to specific Crews within each District. The list of Crews is maintained by each District’s PSEE Administrator. In most cases, the Survey Supervisor (who is notified by email once the Survey Work Order is submitted) would be the person to create Crew Assignments and Reviewer Assignments.

### Adding Crew Assignments

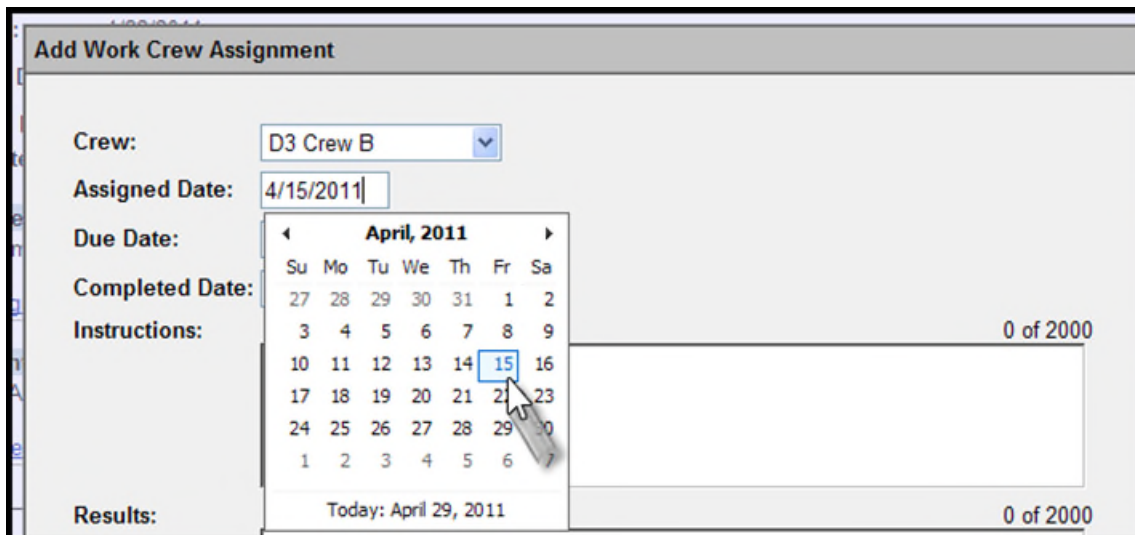
1. Select the **Add Assignment** link within the Work Crew Assignment section. A new window displays.



- **Crew [Required]:** Select the Crew that should work on the Survey from the drop-down.



- **Assigned Date [Optional]:** Enter the date that the Crew was assigned to the Survey.



- **Due Date [Optional]:** Enter the date that the Crew is requested to finish the Survey.
- **Complete Date [Optional]:** Enter the date that the Crew actually finished the Survey.
- **Instruction [Required]:** Enter Instructions that should be shared with the Crew for review.
- **Results [Optional]:** Enter any information related to the Results of the survey.

**Add Work Crew Assignment**

Crew:

Assigned Date:

Due Date:

Completed Date:

Instructions: 37 of 2000

Results: 0 of 2000


2. Select **Save** when all information is entered. The new assignment will display.

Work Crew Assignments (Click to collapse)					
	Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date
+	D3 Crew B	James Jamison	4/15/2011	4/19/2011	<a href="#">[Edit]</a> <a href="#">[Remove]</a>
<a href="#">[Add Work Crew Assignment]</a>					


### Viewing Crew Assignment Details

The details of any assignment can be seen by selecting the plus sign that appears to the left of the Assignee

Name. Details that can be included on an assignment include Instructions to the Assignee and the notes about the results of the Crew’s work.

Work Crew Assignments (Click to collapse)					
Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date	
 D3 Crew B	James Jamison	4/15/2011	4/19/2011		<a href="#">[Edit]</a> <a href="#">[Remove]</a>


  

Work Crew Assignments (Click to collapse)					
Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date	
 D3 Crew B	James Jamison	4/15/2011	4/19/2011		<a href="#">[Edit]</a> <a href="#">[Remove]</a>
Instructions: Please handle based on instructions. Results:					
<a href="#">[Add Work Crew Assignment]</a>					

### Editing a Crew Assignment

Crew Assignments can be edited as needed to change related dates and/or provide instructions to the assignee.

1. Select the **Edit** hyperlink to the right of the Assignment.

Work Crew Assignments (Click to collapse)					
Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date	
 D3 Crew B	James Jamison	4/15/2011	4/19/2011		<a href="#">[Edit]</a> <a href="#">[Remove]</a>

[\[Add Work Crew Assignment\]](#)

2. Update the instructions, comments and related dates as needed. Select **Save** when all information is correct.

**Edit Work Crew Assignment**

Assigned Date:

Due Date:

Completed Date:

Instructions: 85 of 2000

Please handle based on instructions. If you have questions contact PM Ryan Patterson.

Results: 0 of 2000

3. The updates are saved.

Work Crew Assignments (Click to collapse)					
	Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date
<input type="checkbox"/>	D3 Crew B	James Jamison	4/15/2011	4/19/2011	<a href="#">[Edit]</a> <a href="#">[Remove]</a>
<b>Instructions:</b> Please handle based on instructions. If you have questions contact PM Ryan Patterson.					
<b>Results:</b>					
<a href="#">[Add Work Crew Assignment]</a>					

## Reviewer Assignments

Reviewer Assignments can be created to ask someone to review the specific survey(s) completed by the Survey Work Crew.

### Adding Review Assignments

1. Select the **Add Assignment** link within the Reviewer Assignment section. A new window is displayed.
  - **Assignee [Required]:** Enter the staff member that should complete the Review. Only Internal Staff can be selected as Reviewers. Begin typing the first or last name of the Internal User. A list of matching names will appear. Select the name of the Requested By person.

**Add Reviewer Assignment**

Assignee: hewett [Show all users]  
 Assigned Date: HEWETT, ERICA (PM345EH)  
 Approval Date:   
 Instructions:  0 of 255

- **Assigned Date [Optional]:** Enter the date that the Reviewer was assigned.
- **Due Date [Optional]:** Enter the date that the Review should be completed.
- **Approval Date [Optional]:** Enter the date that the Review Assignment was approved.
- **Complete Date [Optional]:** Enter the date that the Review Assignment was completed.

**Add Reviewer Assignment**

Assignee: HEWETT, ERICA (PM345EH) [Show all users]  
 Assigned Date: 4/14/2011 Due Date:   
 Approval Date:  Completed Date:   
 Instructions:  0 of 255  
 Comment:  0 of 2000  
 Today: April 29, 2011

- **Instructions [Required]:** Enter Instructions that should be shared with the Reviewer.
- **Comments [Optional]:** The comments section will be used by the Reviewer to record comments of information generated by their Review.

2. Select **Save** when all information is entered. The new assignment will display.

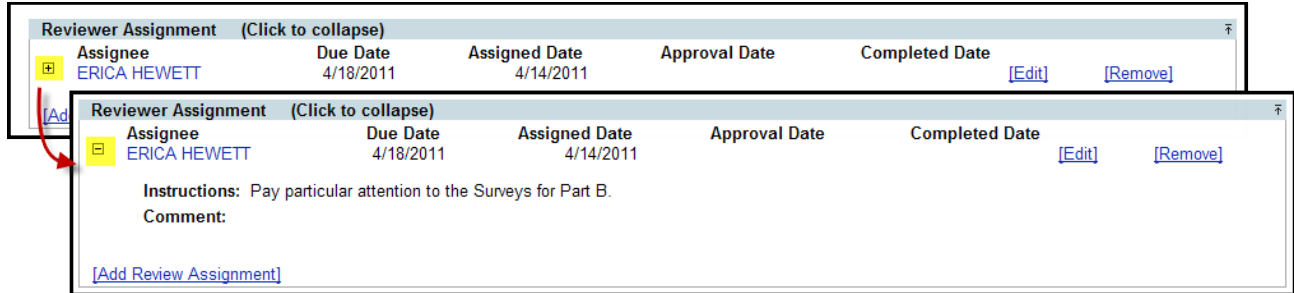
Reviewer Assignment (Click to collapse)					
Assignee	Due Date	Assigned Date	Approval Date	Completed Date	
ERICA HEWETT	4/18/2011	4/14/2011			[Edit] [Remove]

[Add Review Assignment]

## Viewing Assignment Details

The details of any assignment can be seen by selecting the plus sign that appears to the left of the Assignee

Name. Details that can be included on an assignment include Instructions to the Reviewer and Comments made by the Reviewer.



Reviewer Assignment (Click to collapse)					
Assignee	Due Date	Assigned Date	Approval Date	Completed Date	
ERICA HEWETT	4/18/2011	4/14/2011			[Edit] [Remove]

Reviewer Assignment (Click to collapse)					
Assignee	Due Date	Assigned Date	Approval Date	Completed Date	
ERICA HEWETT	4/18/2011	4/14/2011			[Edit] [Remove]
Instructions: Pay particular attention to the Surveys for Part B.					
Comment:					
<a href="#">[Add Review Assignment]</a>					

### Editing a Review Assignment

Assignments can be edited as needed to change related dates and/or provide instructions to the Reviewer.

1. Select the **Edit** hyperlink to the right of the Reviewer Assignment.
2. Update the instructions and related dates as needed. Select **Save** when all information is correct.

3. The updates are saved.

Reviewer Assignment (Click to collapse)					
Assignee	Due Date	Assigned Date	Approval Date	Completed Date	
ERICA HEWETT	4/18/2011	4/14/2011			[Edit] [Remove]
Instructions: Pay particular attention to the Surveys for Part B. We have concerns about that area. Comment:					
[Add Review Assignment]					

### Adding Internal Contacts

Users may also document Internal Contacts that are associated with a Survey Work Order.

1. From the Internal Contacts section, select the **Add Internal Contact** link.

Internal Contacts (Click to collapse)
Currently there are no Internal Contacts set for this Project
[Add Internal Contact]

2. In the **Internal Contact** text box, enter the full or partial name of the FDOT staff member and select the required name from the displayed list

**Add Internal Contact**

Internal Contact:  [\[Show district users only\]](#)

- HODGES, CARLA (KN345CH)
- HODGES, CHARLIE
- HODGES, DUSTIN (RD252DH)
- HODGES, LEE (MT238HL)
- HODGES, MARK (KNKCCMH)
- HODGES, RAY (CN307RH)

3. Select the **Save** button to add the Internal Contact

4. The Internal Contact is created and displayed in the Internal Contact section.

Internal Contacts (Click to collapse)				
Name	Phone	E-mail		
CARLA HODGES	(850) 415-9257	CARLA.HODGES@DOT.STATE.FL.US	[Remove]	
[Add Internal Contact]				

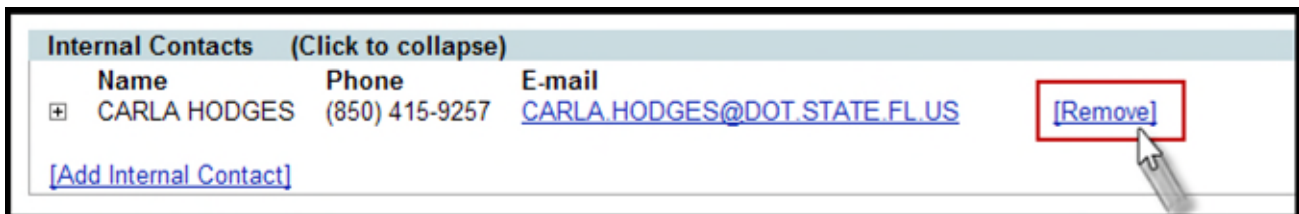
- To see additional details about this Internal Contact select the plus sign to the left of the Contact Name.



### Removing Internal Contacts

Users may remove information related to Internal Contacts.

- If an Internal Contact should no longer be associated with the Survey Work Order it can be removed. Select the **Remove** link to the right of the Contact of the contact details.



- A confirmation dialog box will display. Select the **OK** button to remove the Internal Contact.

### Adding External Contacts

Users can document External Contacts that are associated with a Survey Work Order.

- Select the **Add External Contact** link from the External Contacts section. A dialog box with appropriate fields will display to add an External Contact.
- A new window will open. Begin typing the name of the Contact in the **Name** field. A list of matching names will begin to form just below. Select the contact from this list and PSEE will automatically populate the remaining fields.

**Add External Contact**

Name:

Title:

Address Line 1:

Address Line 2:

City:

State:

Zip:

3. If the needed contact does not appear in the list, continue typing the complete name and simply fill out the contact information as needed. The information must include at least one form of contact for the customer (email address, phone number or postal address).
4. Select **Save** when all needed information has been updated or entered.
5. The contact will be created and displayed in the External Contact section. Select the plus sign to the left of the contact name to display all of their contact information.

***Editing or Removing External Contacts***

Information about an External Contact may be edited or removed after it is added.

1. To Edit an External Contact, select the **Edit** link to the right of their contact information.

**External Contacts** (Click to collapse)

Name	Phone	E-mail	Organization
+ Susan Q Manager	(111) 222-3333	<a href="mailto:susan@email.com">susan@email.com</a>	

[\[Add External Contact\]](#) [\[Edit\]](#)

- The details about the External Contact are displayed. Update the needed information and select **Save**.

**Edit External Contact**

**Name:** Susan Q Manager

**Title:**

**Address Line 1:**

**Address Line 2:**

**City:**

**State:**   **Zip:**

**Primary Phone Number:**  **Ext.:**

**Mobile Phone Number:**

**Fax Number:**  **Ext.:**

**Email Address:**

**Website Address:**

**Comment:**

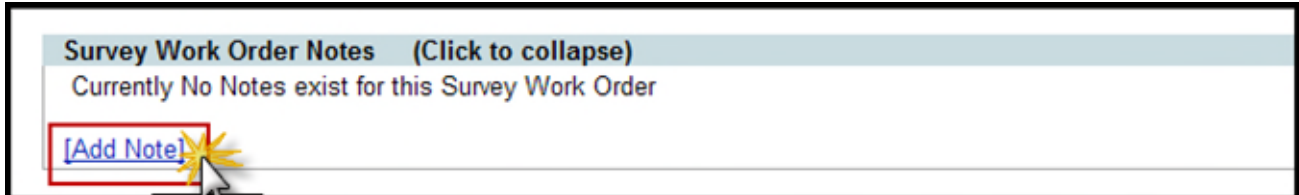
**Organization:**  [Clear](#)

- To Remove an External Contact, select the **Remove** link to the right of the Contact details.
- A confirmation dialog box will display. Select **OK** to remove the Contact.

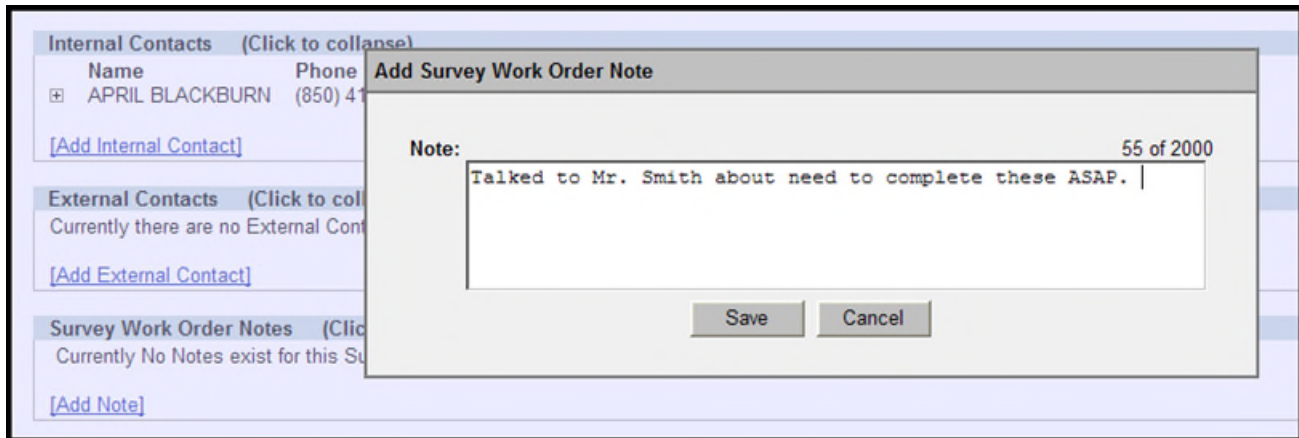
**Adding Survey Work Order Notes**

A Survey Work Order Note allows you to document the latest information related to the Survey Work Order effort.

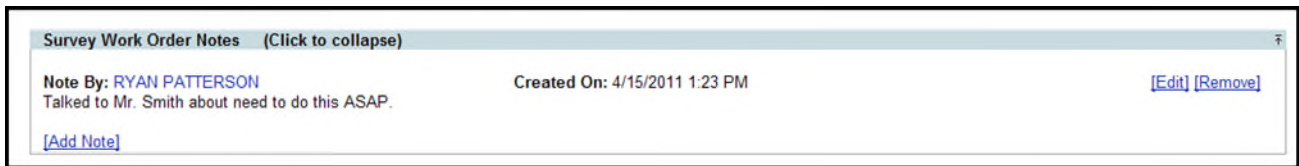
1. Select the **Add Note** link.



2. Enter the details in the displayed Survey Work Order Note window and select **Save**.

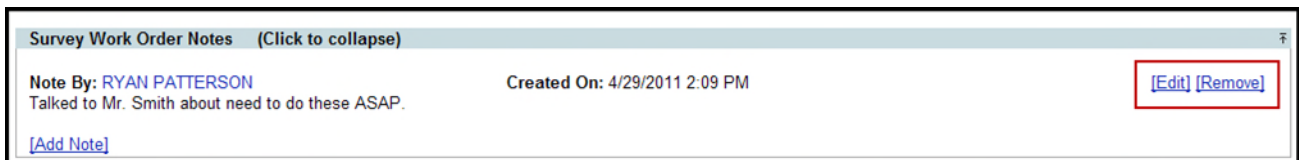


3. The new Survey Work Order Note is displayed.



**Edit/Remove Survey Work Order Notes**

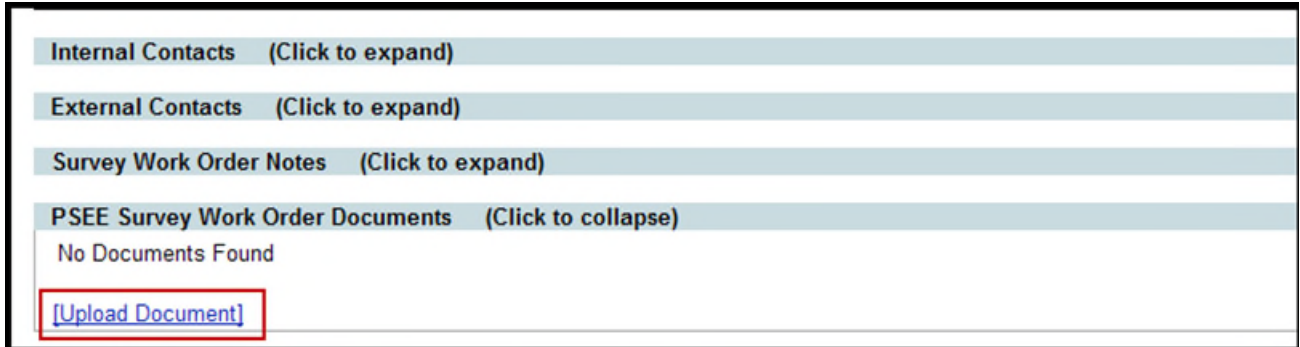
1. Survey Work Order Notes may be edited by selecting the **Edit** link that appears to the right of the Note. Make changes to the notes entry as desired and select the **Save** button.
2. If a Survey Work Order Note entry is no longer needed, select the Remove link to the right of the notes entry.



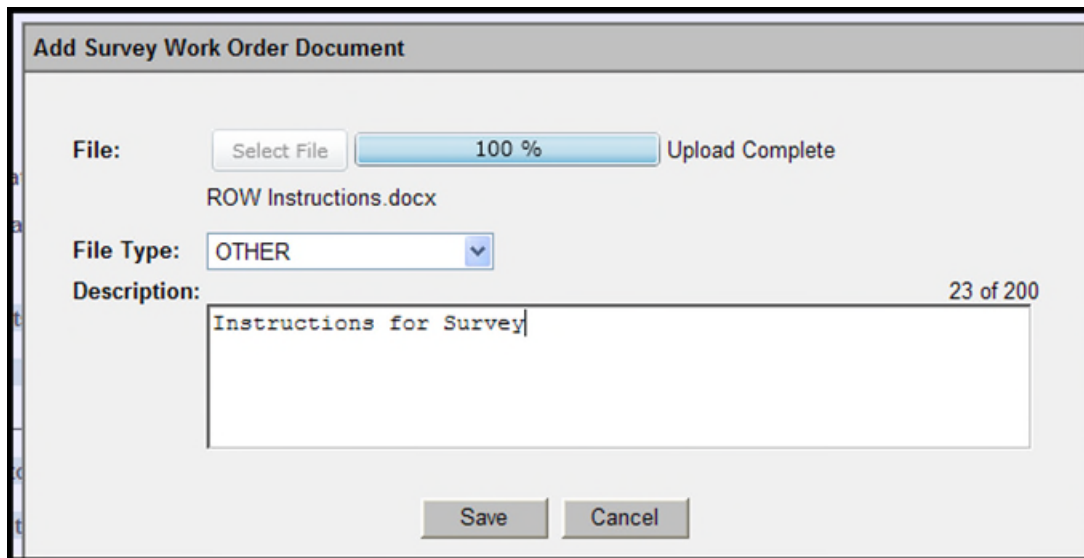
## Adding Documents to Survey Work Order

Documents may be attached to Survey Work Orders.

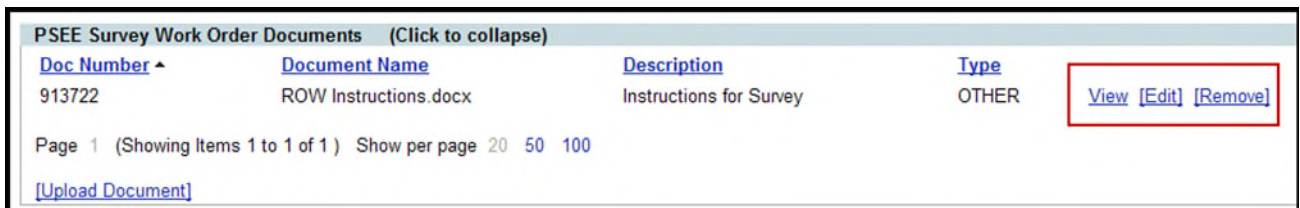
1. From the Survey Work Order Documents section, select the **Upload Document** link.



2. A new window appears. Select the document you wish to upload by selecting the **Select File** button. Select the document type and add a description for the document **[required]** and select the **Save** button.



3. The document appears in the list. Attached documents can be managed from their list. From there you can View, Edit or Remove the document.



- Select the **View** link to retrieve the document for display. The document will be opened in its native application.
- Select the **Edit** link to replace the attached document with a new version or change the description of the document.
- Select the **Remove** link to remove the document from the Design Approval Request. You will be prompted with a confirmation dialog box. Select **OK** to remove the document or **Cancel** to retain it.

## Submitting A Survey Work Order

Once all information has been entered, a Survey Work Order can be submitted to begin the process.

1. From the Survey Work Order list, select **View** to see the details of the Survey Work Order.

Survey Work Order (Click to collapse) <span style="float:right">?</span>							
	Work Order Number	Requested By	Summary	Complete Date (A=Actual)	Delivery Date (A=Actual)	Work Order Due Date	Status
<a href="#">View</a>	419305-1-3	ASHLEY BROWN	Aerials for First Section			4/28/2011	Open
<a href="#">View</a>	419305-1-4	RYAN PATTERSON	Elevation/Station/Offset Outfall			4/22/2011	Draft

[\[Add Survey Work Order\]](#)

2. Select the **Submit** hyperlink.

[Return to Survey Work Order List](#)

Detail **Design**

[\[Edit\]](#) [\[Submit\]](#) [\[Complete\]](#)

Work Order Number: 419305-1-4

Created Date: 4/29/2011

Requested Date: 4/8/2011

Requested By: RYAN PATTERSON

Level of Request: Other Request Level

Level Description: Topography at blow out

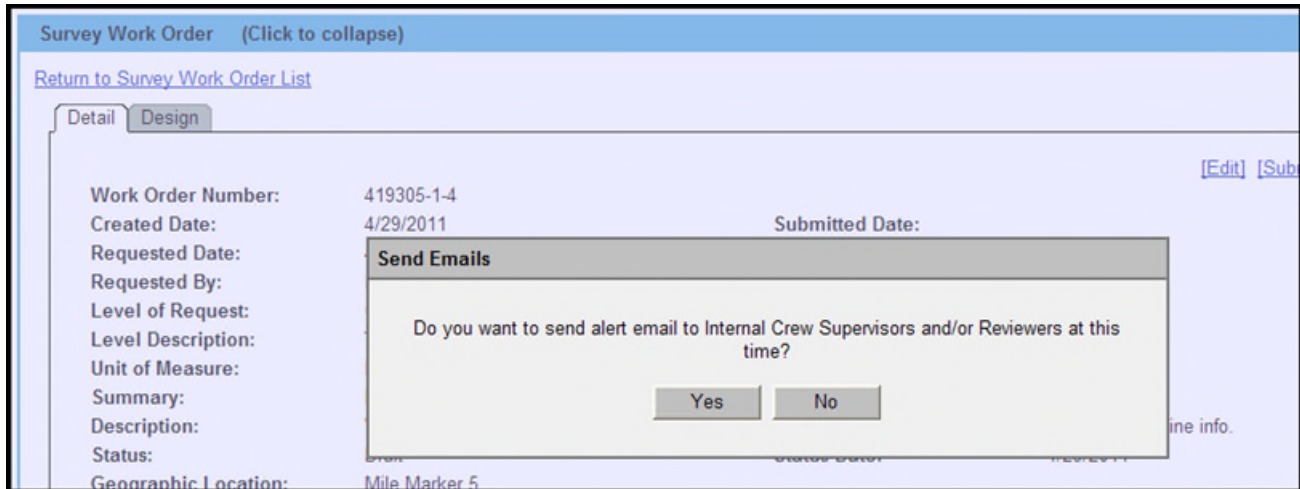
Unit of Measure: ENGLISH

Summary: Elevation/Station/Offset Outfall

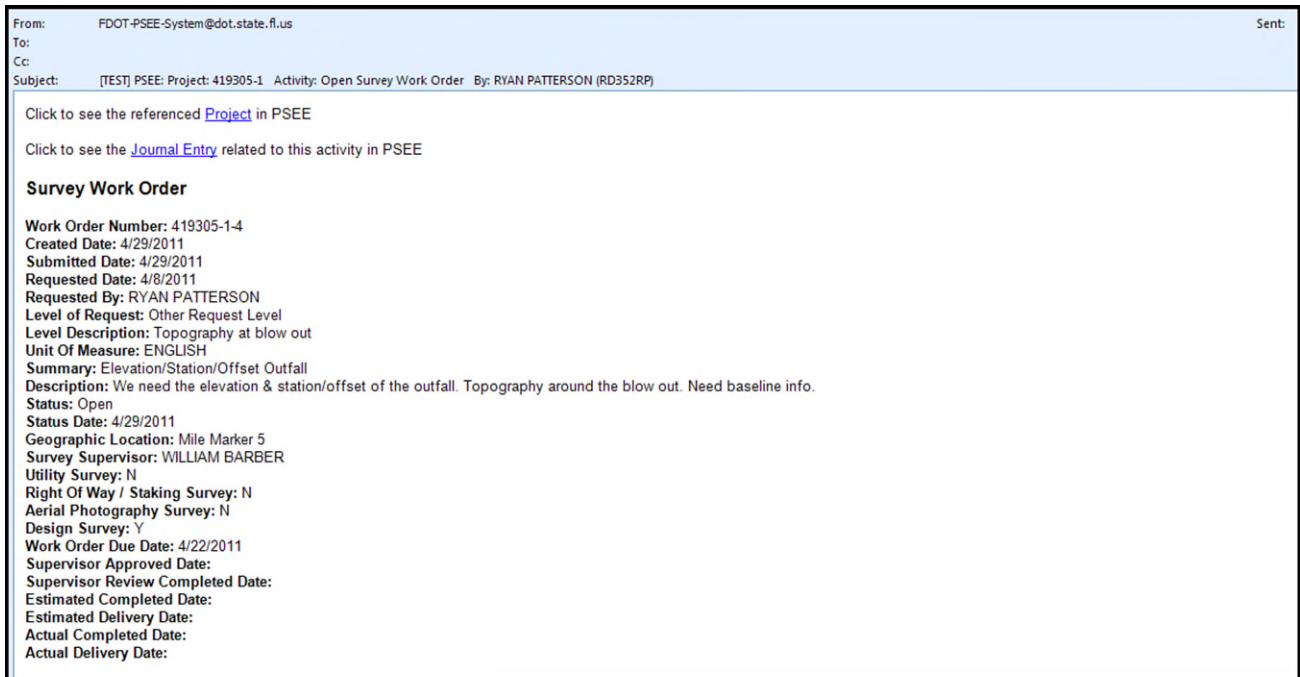
Description: We need the elevation & station/offset of the outfall. Topography around the blow out. Need baseline info.

Submitted Date:

- You will be asked if you would like to notify Internal Crew Supervisors and Reviewers that you have added. Select “Yes” to send them emails, or “No” to not send. The Survey Supervisor will always be notified when a Survey Work Order is submitted.



#### 4. Sample Email



### Completing A Crew Assignment

Once the Crew Supervisor is aware of a Survey Work Oder, they can make the needed arrangements to have the work completed. The Crew Supervisor can update information related to the Crew Assignments as it becomes available.

1. From the Crew Assignments section select **Edit**.

Work Crew Assignments (Click to collapse)					
Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date	
D3 Crew B	James Jamison	4/15/2011	4/19/2011		<a href="#">[Edit]</a> <a href="#">[Remove]</a>
<a href="#">[Add Work Crew Assignment]</a>					

2. Make the needed updates to the information and select **Save**.

**WILLIAM BARBER**

### Edit Work Crew Assignment

**Assigned Date:**

**Due Date:**

**Completed Date:**

**Instructions:** 85 of 2000

Please handle based on instructions. If you have questions contact PM Ryan Patterson.

**Results:** 46 of 2000

Survey did not uncover any unexpected issues. |

3. The Survey Work Order now reflects that the Crew's work is complete.

Work Crew Assignments (Click to collapse)					
Crew	Crew Supervisor	Assigned Date	Due Date	Completed Date	
D3 Crew B	James Jamison	4/15/2011	4/19/2011	4/18/2011	<a href="#">[Edit]</a> <a href="#">[Remove]</a>
<b>Instructions:</b> Please handle based on instructions. If you have questions contact PM Ryan Patterson.					
<b>Results:</b> Survey did not uncover any unexpected issues.					
<a href="#">[Add Work Crew Assignment]</a>					

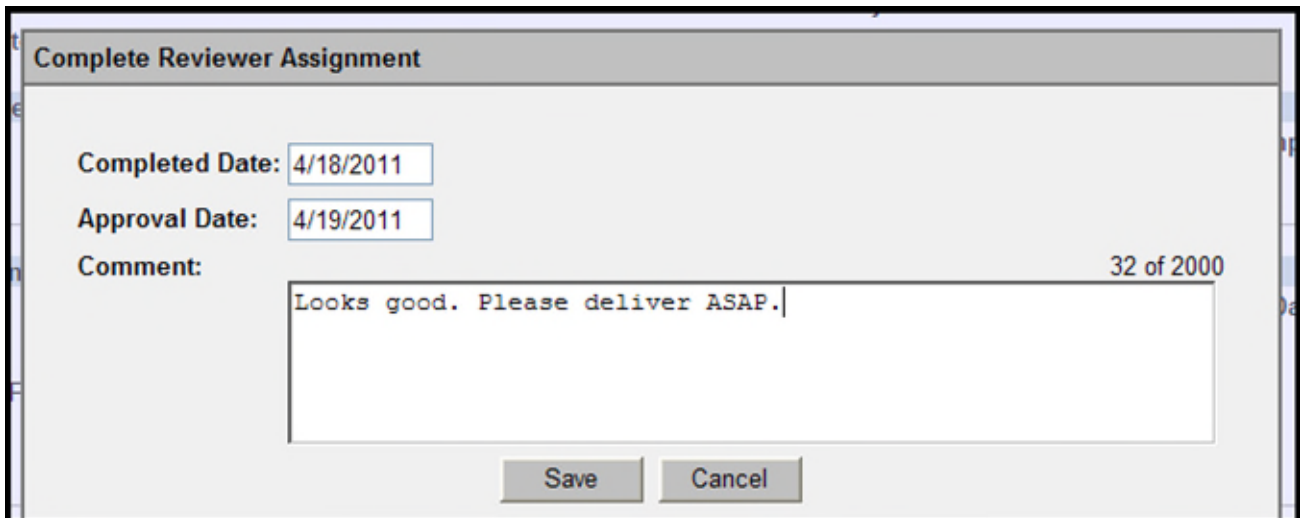
### Completing a Review Assignment

Once all of the Survey Crews have completed their work, any assigned Reviewers can review the Survey Work.

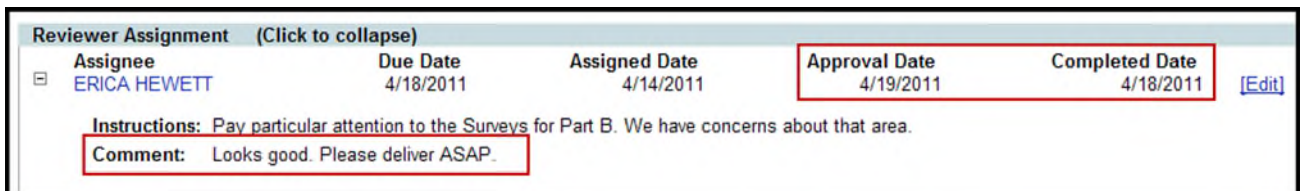
1. Select the **Edit** hyperlink to the right of the Reviewer Assignment.



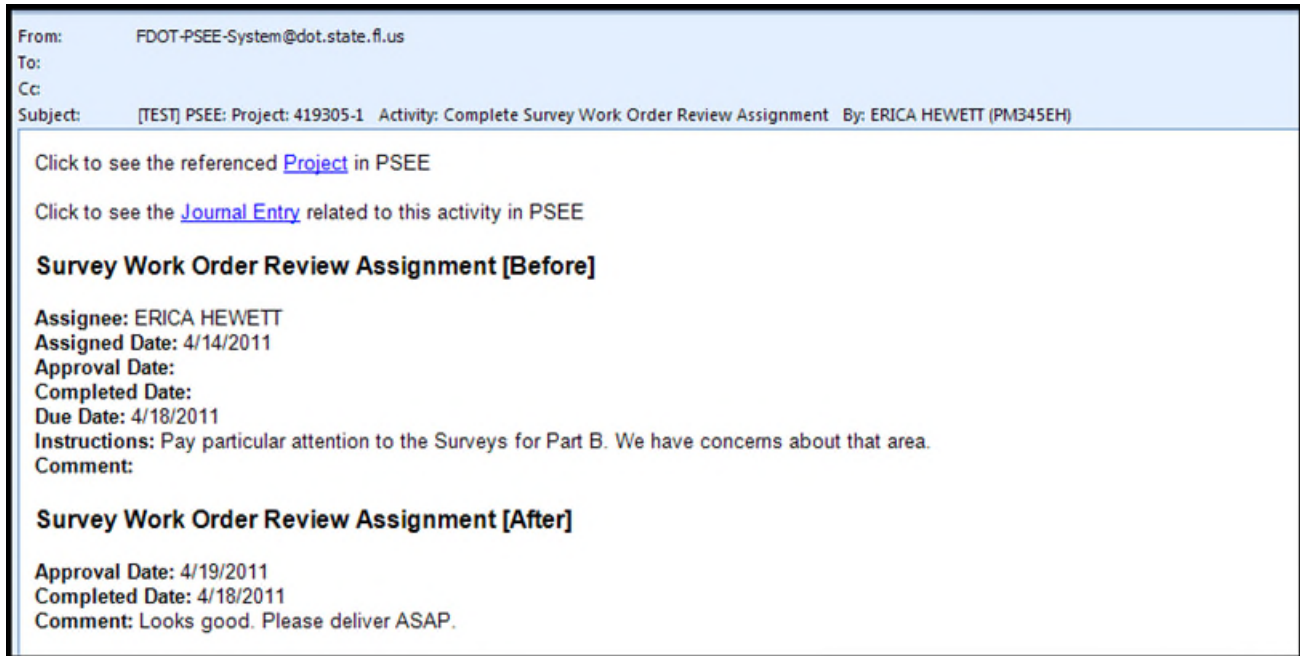
2. Update the comments and related dates as needed. Select **Save** when all information is correct.



3. The updates are saved.



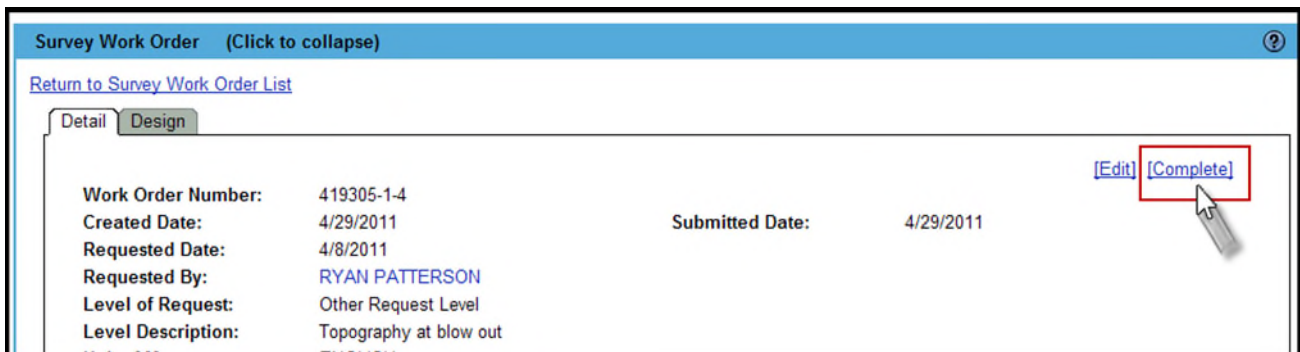
- An email is generated documenting the Review has been completed.



## Completing A Survey Work Order

Once all work and reviews are complete, the Survey Work Order can be marked as Complete.

- From the Survey Work Order list, select the **View** link to the right of the Survey Work Order to view all the details.
- Ensure that all information, such as completion dates, is recorded. If needed, select **Edit** to update any missing information.
- Select the **Complete** link.



4. The Survey Work Order is now marked as Complete.

Survey Work Order (Click to collapse)							
Work Order Number	Requested By	Summary	Complete Date (A=Actual)	Delivery Date (A=Actual)	Work Order Due Date	Status	
<a href="#">View</a> 419305-1-3	ASHLEY BROWN	Aerials for First Section			4/28/2011	Open	<a href="#">[Remove]</a>
<a href="#">View</a> 419305-1-4	RYAN PATTERSON	Elevation/Station/Offset Outfall	4/19/2011 A	4/19/2011 A	4/22/2011	Completed	<a href="#">[Remove]</a>

[\[Add Survey Work Order\]](#)

## Reopen A Survey Work Order

If you find that a Survey Work Order needs to be updated it may be Reopened.

1. From the Survey Work Order list, select the **View** link to the right of the Survey Work Order.
2. Select the Reopen link.

Survey Work Order (Click to collapse)

[Return to Survey Work Order List](#)

Detail Design

[\[Archive\]](#) [\[Reopen\]](#)

Work Order Number: 419305-1-4  
 Created Date: 4/29/2011 Submitted Date: 4/29/2011  
 Requested Date: 4/8/2011  
 Requested By: RYAN PATTERSON  
 Level of Request: Other Request Level

3. You will be asked if the Crew Supervisor and Reviewers should be notified.

419305-1-4  
 4/29/2011 Submitted Date: 4/29/2011

**Send Emails**

Do you want to send alert email to Internal Crew Supervisors and/or Reviewers at this time?

Yes No

Mile Marker 5

4. Update information as needed and/or re-address steps of the Survey Work Order. Once complete, mark the Survey Work Order as Complete again.