

# **Oracle® Utilities Work and Asset Management**

ESRI (ArcMap) User Guide

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Primary Author: TUGBU Documentation

Contributing Author: n/a

Contributor: n/a

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# ESRI ArcMap User Guide

The ESRI ArcMap GIS map viewer provides a means of navigating between the Oracle Utilities Work and Asset Management application and external GIS data. Using the map viewer you can view and manipulate asset and maintenance information based on geographic location.

*Note:* Before the map viewer can be used, your system administrator must load a GIS map, configure the GIS Setup business rule, and assign user responsibilities. Please refer to the [ESRI ArcMap Installation and Configuration Guide](#) for further instructions.

## Map Viewer

The map viewer provides basic GIS map viewing functionality. In addition to the menu options the map viewer window includes the map display panel, a toolbar consisting of pan and zoom controls, and a layer selections panel that controls what map features display.

## Toolbar

Hover the cursor over the icons to reveal their functionality. Click on the icons to select the following map image controls from the Control Panel.

**Zoom In** - Modifies map coordinates to produce a zoomed in (larger scale) map about the mouse cursor point.

**Zoom Out** - Modifies map coordinates to produce a zoomed out (smaller scale) map about the mouse cursor point.

**Fixed Zoom In** - Modifies map coordinates to produce a map zoomed in about the current center point.

**Fixed Zoom Out** - Modifies map coordinates to produce a map zoomed out about the current center point.

**Pan** - Use this tool to shift the map in the desired direction. Click on the Pan tool and then click on the map and move the mouse pointer to move the map.

**Full Extent** - Shows the entire map with maximum zoom.

**Go Back** - Returns to the previous map view.

**Go Forward** - Opens the next available map view.

**Select Features** - Click on the Select Features tool Box and then click on a map feature to select one that map feature. To select more than one map feature, click on the Select Features icon and either hold down the shift key while you click on each map feature you want to select, or draw a

rectangle around the features you want to select. When you release the mouse button, the features are selected.

**Find** - Click on the Find icon to display a window where you can search for any map feature. You can choose to search by layer and field or search all layers and all fields. When you are finished building your query, click on the Find button to execute your search.

The results of your search display in the lower section of the window. Right click on an item in the results list and select Zoom to feature(s) to navigate to the feature on the GIS map.

## Layer Selections

The left panel of the map viewer controls which predefined map layers are displayed in the viewer. You can turn layers on and off by clicking the check boxes associated with each layer. After adding or removing a layer, you may need to click the refresh icon to see the change.

# Viewing and Printing Maps

You can navigate from the Oracle Utilities Work and Asset Management application to the map viewer by selecting the View Map or Print Map actions each of the following modules: Asset, Work Order, Work Order Task, Benchmark Work Order, PM Master, and Service Request.

The View Map and Print Map actions are available on the Results of Search and Main Records screens in all modules that support GIS functionality.

## View Map

You can navigate from the Oracle Utilities Work and Asset Management application to the map viewer by selecting the View Map or Print Map actions from the Actions list in each of the modules that support GIS: Asset, Work Order, Work Order Task, Benchmark Work Order, PM Master, and Service Request. When you have the View GIS responsibility in your User Profile, the GIS actions are available in these modules when you are viewing the main record or the results of search screen.

As long as assets are correctly assigned to map features, the map viewer opens the correct map and pans/zooms the map to the location/feature(s) identified on the record you were viewing in Oracle Utilities Work and Asset Management.

Regardless of which Oracle Utilities Work and Asset Management module you are using when you launch the viewer, Asset data is required for the viewer to locate a specific location. If no Asset data is available on the Oracle Utilities Work and Asset Management record when the user selects View Map from the GIS menu, a large-scale map opens in the viewer. You can then use the viewer's pan, zoom and search controls to locate desired features.

If you view a map from a module other than the Asset module, it will show the mapped assets associated with that module. A map opened from the Work Order module, for example, shows the asset listed on the selected work order.

*Note:* If you have previously launched the viewer and it is running in the background behind the Oracle Utilities Work and Asset Management application, clicking on the View Map option will not reopen the viewer. To open the viewer when it is running in the background, click on the map viewer icon on the windows toolbar.

## Print Map

When you select the Print Map menu option from any module supporting GIS, the map viewer opens the correct map, pans/zooms the map to the location/feature(s) identified on the Oracle

Utilities Work and Asset Management record, and prints the resulting map. Depending on your printer configuration, you may be prompted for printer location.

From the Service Request module, you can also select Print Map (Tax ID) to print a map of the customer's address on the service request.

## Menu Options

The functional requirements of the map viewer are accessed through Oracle Utilities Work and Asset Management menu options, which display near the top of the map viewer window. Each menu has a sub-menu that lists additional options when the main menu item is selected. The following sections detail the functionality available on the sub-menus.

### Planning Work

Within the GIS application, you can gather information relevant to work you need to perform on assets. For example, you can view details about Oracle Utilities Work and Asset Management Asset records, and you can view a list of Work Order, PM Master, or Service Request records associated with selected assets on the map. In this way, you will know if there are existing plans to work on the assets, or if a new Work Order record needs to be created. If a Work Order or Service Request record needs to be created, you can also do this from within the GIS application. You must already be signed on to the Oracle Utilities Work and Asset Management application in order to view Oracle Utilities Work and Asset Management records from the map viewer.

### Asset

You can select from the Asset menu to create a new asset, view assets, assign and unassign an Asset ID to a map feature, and assign a parent asset.

Some menu selections may be unavailable depending on which map feature(s) are selected.

### Managing Asset Assignments

After you perform work on assets to repair or upgrade equipment, you may need to modify or update asset assignments on the GIS map. For example, after repairing a broken pipe, you may want to unassign and de-activate the previous asset record, create new asset records, and assign the new asset records to each section of the broken pipe. Oracle Utilities Work and Asset Management GIS enables you to unassign, de-activate, assign, and create Oracle Utilities Work and Asset Management Asset records from the GIS application.

#### How to Create an Asset Record from the GIS Map

- Select a feature on the map that has not been assigned an asset ID.**

Make sure that you select only one feature, and that the feature does not already have an assigned asset. Otherwise the Create option will be greyed out.

Click on the Select Features tool and then click on the map feature you want to select.
- Select Create Asset from the Oracle Utilities Work and Asset Management Asset menu.**

The Create Asset dialog box opens.
- Enter basic information to create the Asset record.**

The system fills in the Plant field. The Plant, Record Type, Asset ID, and Asset Type fields are required. All information entered here will be included on the Asset record you create.
- Click on the Create button.**

The system confirms that the asset has been created successfully and places the Oracle Utilities Work and Asset Management Asset record in Inactive status.

The system displays a warning if the asset ID that you enter already exists.

**5. Click OK.**

The system asks whether you want to assign the asset to the selected feature.

**6. Select Yes or No as appropriate, then click OK.**

If you select Yes, the system labels the selected feature with the asset ID.

**7. To view or modify the Asset record, open the Asset ID record in Oracle Utilities Work and Asset Management.**

The Asset module is located in the Resource subsystem.

### How to View an Asset

**1. Select features on the map that have an assigned asset ID.**

You can select one asset or several assets+. To select more than one asset, click on the Select Features tool icon and hold down the shift key while you click on each map feature you want to select.

**2. Select View Asset from the from the Oracle Utilities Work and Asset Management Asset menu.**

If you have selected only one asset in the map viewer, the Asset record. opens in the Oracle Utilities Work and Asset Management application window.

If you have selected more than one asset in the map feature, the Asset module results of search window opens, where you can select the asset record to view.

Remember that map features must have assigned asset IDs in order for them to display in the Oracle Utilities Work and Asset Management window. If you select nine map features, but only five have asset IDs, only those five will display on the results of search page.

### How to Assign an Asset ID to a Map Feature

You can assign an asset to one or more features on the map, but you must assign the asset to one feature at a time.

**1. Select a feature on the map that has not been assigned an asset ID.**

Make sure that you select only one feature, and that the feature does not already have an assigned asset. Otherwise the Assign option will be greyed out.

**2. Select Assign Asset from the Oracle Utilities Work and Asset Management Asset menu.**

The Assign Asset dialog box opens.

**3. Enter criteria to search for the Oracle Utilities Work and Asset Management Asset record.**

You can enter search criteria in the fields in the upper portion of the window. List of Values are available.

**4. Click the Search button.**

Search results display in the lower portion of the window.

If you need to modify the search criteria, select the Clear button to clear the fields in the upper portion of the window, enter new search criteria, and click the Search button again.

**5. Highlight the Asset record you want to assign.**

**6. Click the Assign button.**

The system displays a message requesting confirmation.

**7. Click on the Yes button to confirm.**

**8. Click on the OK button.**

The system closes the dialog box and labels the map feature with the Asset record ID.

**How to Unassign an Asset ID**

- 1. Select a feature on the map that has been assigned an Asset record.**
- 2. Select Unassign Asset from the Oracle Utilities Work and Asset Management Asset menu.**

If an Asset record has not already been assigned to the selected feature, the Unassign option on the menu is greyed out.

The system displays a message asking you to confirm removal of the asset ID.

**3. Select Yes to confirm.**

The system asks if you want to change the status of the asset record to Inactive.

**4. Select Yes or No as appropriate.**

The system confirms that the removal is complete and removes the asset ID label from the selected feature on the map. The feature remains selected.

**How to Assign a Parent Asset**

Assets can have parent/child relationships with other assets. Costs associated with a child asset roll-up the asset hierarchy to the parent asset, along with other child asset costs.

- 1. Select a feature on the map that has been assigned an Asset record.**
- 2. Select Assign Parent from the Oracle Utilities Work and Asset Management Asset menu.**

The Assign Parent window opens.

- 3. Enter the Record Type and Asset ID for the Parent Asset.**
- 4. Click on the Assign button.**

The system confirms the assignment of the parent asset.

**5. Click on the OK button.**

## Work Order

At a minimum, Work Orders describe the work to be performed and the Asset to be worked on. You can select from the Work Order menu to create or to view existing Work Orders. Both menu options are available when at least one selected map feature has an assigned Asset ID.

**How to Create a Work Order from the GIS Map**

- 1. Select one or more assets on the map.**
- 2. Select Create Work Order from the Oracle Utilities Work and Asset Management Work Order menu.**

The system displays a message confirming the selected asset(s).

**3. Click on the Yes button to create the Work Order.**

The Work Order module opens showing the Work Order record created. If you selected more than one asset in Step 1, the work order will include a separate task for each asset selected.

- 4. Review and update the record as necessary.**
- 5. Click on the Save icon.**

6. **The work order is created with basic information, but you can update the record with additional information as necessary.**

### **How to View a Work Order Task for a Feature on the GIS Map**

1. **Select one or more features on the GIS map.**

At least one feature must have an assigned Oracle Utilities Work and Asset Management Asset record.

2. **Select View Work Order Task from the Oracle Utilities Work and Asset Management Work Order menu.**

If only one work record is found, that record opens in the Oracle Utilities Work and Asset Management window.

If more than one corresponding record is found, a results of search window opens showing the appropriate records. matching your view request, You can then select the record you want to view.

If you want to modify your search, click on Search Options button to open the Oracle Utilities Work and Asset Management search screen, where you can edit or delete the Custom SQL statement for the current search. You can also modify your search by returning to the map viewer and selecting other map features you want to view.

You use similar steps to view Work Order Tasks, PM Masters and Service Requests from the map reader.

## **PM Master**

PM Master records contain the cycling information used by batch processing to generate Preventive Maintenance Work Orders.

Depending on how your system is configured, you may see either one, or both, of the following options on the PM Master menu:

- View PM Master (in Oracle Utilities Work and Asset Management)  
Select this option to view the full PM Master records in the Oracle Utilities Work and Asset Management application.
- View PM Master

Select this option to open an search window where you can choose to view PM Master details for the selected assets only, both selected and parent assets, or parent assets only.

### **How to View a PM Master**

1. **Select one or more features on the GIS map.**

At least one feature must have an assigned Oracle Utilities Work and Asset Management Asset record.

2. **Select View PM Master from the PM Master menu.**

If only one PM Master is found, that record opens in the Oracle Utilities Work and Asset Management window.

If more than one corresponding record is found, a results of search window opens showing the records matching your view request, You can then select the record you want to view.

3. **Enter a search criteria.**

Use the drop down list to indicate if you want to see PM Masters for the selected assets only, selected and parent assets, or the parent assets only. You can also choose the status of the PM Masters and select an order by criteria.



**4. Click on the Search button.**

Details for PM Masters found display in the grid below your selection criteria.

**5. Click on the Close button to return to the GIS map.**

You can also click on the Print button to print the PM Master details, or the Clear button to clear the search criteria.

## Service Request

Service Request records identify the problem reported, the location, and customer / caller information. Select from the Service Request menu to create a Service Request, record (add) other assets to a existing Service Request, and view a Service Request from the GIS map. From within the Oracle Utilities Work and Asset Management application, two additional actions are available from the Service Request module: View Map Tax ID and Print Map Tax ID, which show the map location of the principle property unit associated with the customer. To use the CGIS functionality for Service Requests you must launch the GIS map from the Service Request module.

### How to Record Assets on a Service Request

**1. Open the appropriate Service Request record in Oracle Utilities Work and Asset Management.**

The Service Request module is located in the Customer subsystem.

**2. Select View Map from the GIS menu.**

The GIS application launches, opens the map in Data View, zooms in and selects all features with assigned assets associated to the service request. There can be zero, one or more features selected.

**3. Select additional features on the GIS map with assigned asset IDs.**

Make sure to hold down the Shift key as you select additional features if you want the current features to remain selected. Otherwise, the currently associated assets will be replaced with the new assets you are selecting.

**4. Select Record Assets from the Oracle Utilities Work and Asset Management Service Request menu.**

The system displays a message requesting confirmation.

**5. Click on the Yes button.**

The system records the assets on the Service Request Asset List view, dividing the percentage split equally between the assets. Any previous assets that were on this list are replaced.

### How to Create a Service Request from the GIS Map

**1. Select one or more assets on the map.**

**2. Select Create Service Request from the Oracle Utilities Work and Asset Management Service Request menu.**

The system displays a message confirming the selected asset(s).

**3. Click on the Yes button to create the Service Request.**

The Service Request module opens showing the Service Request record created.

If you selected more than one asset in Step 1, you can open the Service Request Asset List view to see a listing of the assets included and the percentage split between assets.

**4. Review and update the record as necessary.**

Once the record is open in Oracle Utilities Work and Asset Management, all Oracle Utilities Work and Asset Management functionality is available. In addition to adding additional data

to the record, you can also check for duplicate service requests, adjust the percentage split between assets, and do other work as appropriate.

5. **Click on the Save icon.**

### **How to View a Service Request from the GIS Map**

1. **Select one or more features on the GIS map.**

At least one feature must have an assigned Oracle Utilities Work and Asset Management Asset record.

2. **Select View Service Request from the Oracle Utilities Work and Asset Management menu.**

If only one service request is found, that record opens in the Oracle Utilities Work and Asset Management window.

If more than one corresponding record is found, a results of search window opens showing the records matching your view request. You can then select the record you want to view.

## **Searching the Map**

In addition to searching for map features from within the Oracle Utilities Work and Asset Management application, you can also search for specific addresses, intersections, and parcels on the map directly from the map viewer. The search feature is particularly useful if you launch the map viewer from a link on your homepage, rather than from a Oracle Utilities Work and Asset Management asset or work record.

### **How to Search for an Address**

1. **Select Search Address from the Oracle Utilities Work and Asset Management Search menu.**

The system opens the Search Address dialog box.

2. **Enter an exact or a partial address in the fields provided.**

You can enter a street number, street name and street suffix.

The search button remains disabled until you have entered enough information to execute the search. At a minimum, you must enter at least 3 letters of the street name. Numbers you enter in the Street number field will be found anywhere in the number string. For example, a search for “42” “tay” street will return results for “242 Taylor Street”.

3. **Click Search.**
4. **Select the address you are searching for in the Search Results box.**
5. **Click Zoom To Address to locate the address on the map.**

### **How to Search for an Intersection**

1. **Select Search Intersection from the Oracle Utilities Work and Asset Management Search menu.**

The system opens the Search Intersection dialog box.

2. **Enter the first street name and click Search.**

The Search button remains disabled until you have entered at least 3 letters of the street name. When you click Search, the system displays search results for the street you entered.

3. **Select the street from the results list and click Locate Intersections.**

A list of intersections with crossing streets displays.

4. **Select the appropriate cross street from the intersection list.**

5. Click **Zoom To Intersection** to locate the intersection on the map.

**How to Search for a Parcel**

1. Select **Search Parcel** from the **Oracle Utilities Work and Asset Management Search menu**.

The system opens the Search Parcel dialog box.

2. Enter a **parcel ID** or **owners name** in the fields provided.

The search button remains disabled until you have entered enough information to execute the search.

3. Click **Search**.
4. Select the appropriate parcel or owner in the **Search Results** box.
5. Click **Zoom To Parcel** to locate the parcel on the map.