



5.0 Admin Guide

C/S Admin Stuff



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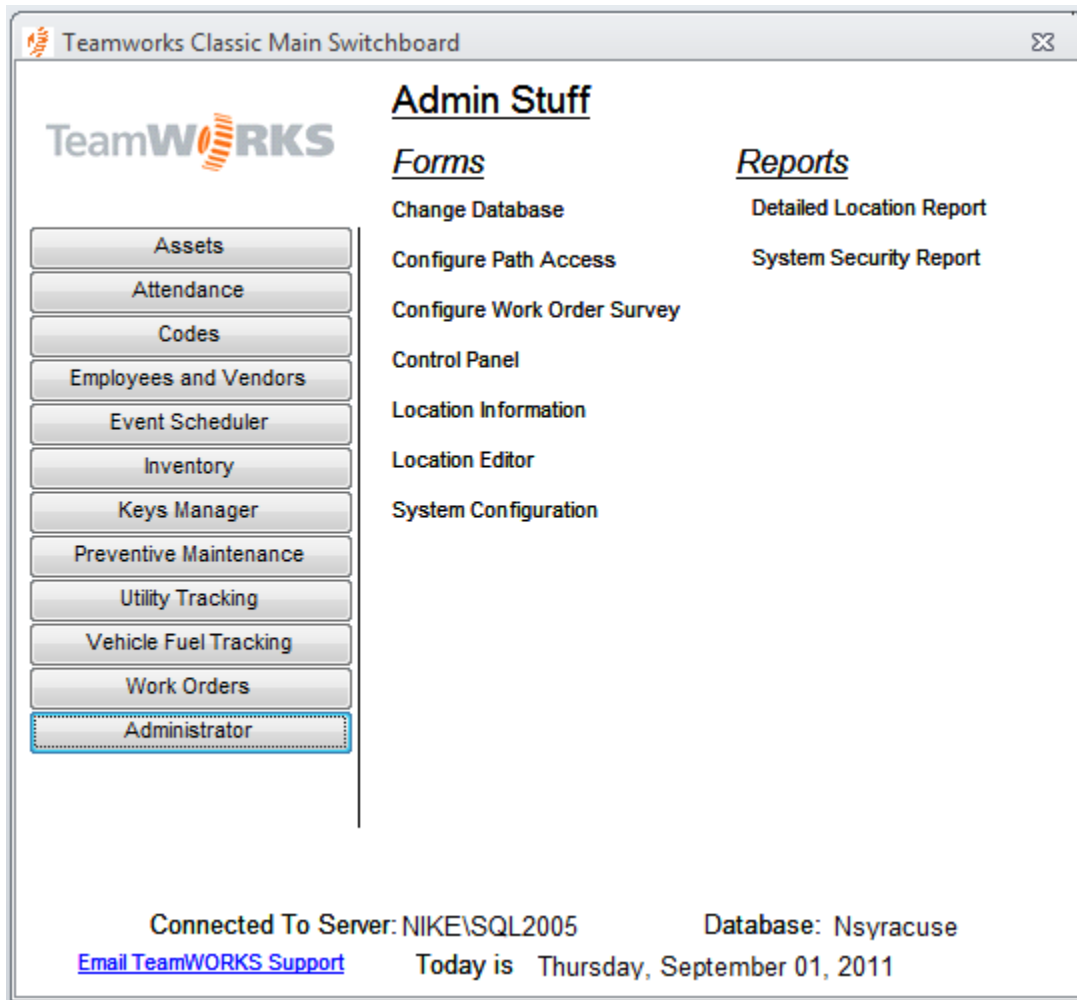
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Admin Staff

In order to access the Administrator functionality, you must be set up as **SystemAdmin** in the TeamWORKS WEB Control Panel.

Admin Staff Switchboard

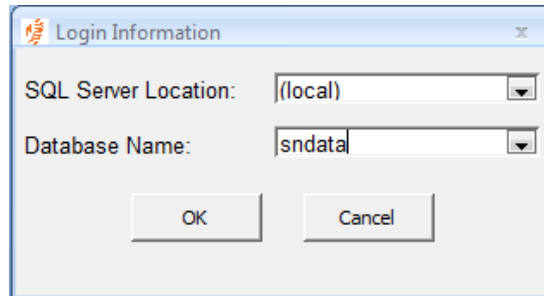


The screenshot shows the 'Teamworks Classic Main Switchboard' window. On the left is a vertical menu with buttons for Assets, Attendance, Codes, Employees and Vendors, Event Scheduler, Inventory, Keys Manager, Preventive Maintenance, Utility Tracking, Vehicle Fuel Tracking, Work Orders, and Administrator (highlighted with a blue border). The main area is titled 'Admin Staff' and is divided into two columns: 'Forms' and 'Reports'. The 'Forms' column includes links for Change Database, Configure Path Access, Configure Work Order Survey, Control Panel, Location Information, Location Editor, and System Configuration. The 'Reports' column includes links for Detailed Location Report and System Security Report. At the bottom, it displays connection information: 'Connected To Server: NIKE\SQL2005', 'Database: Nsyracuse', and 'Today is Thursday, September 01, 2011'. A link for 'Email TeamWORKS Support' is also present.

Forms

Change Database

The change database form allows you to connect the client application to another TeamWORKS database. This is mainly used for Archived data. After selecting your database, the client will re-link to the selected database.



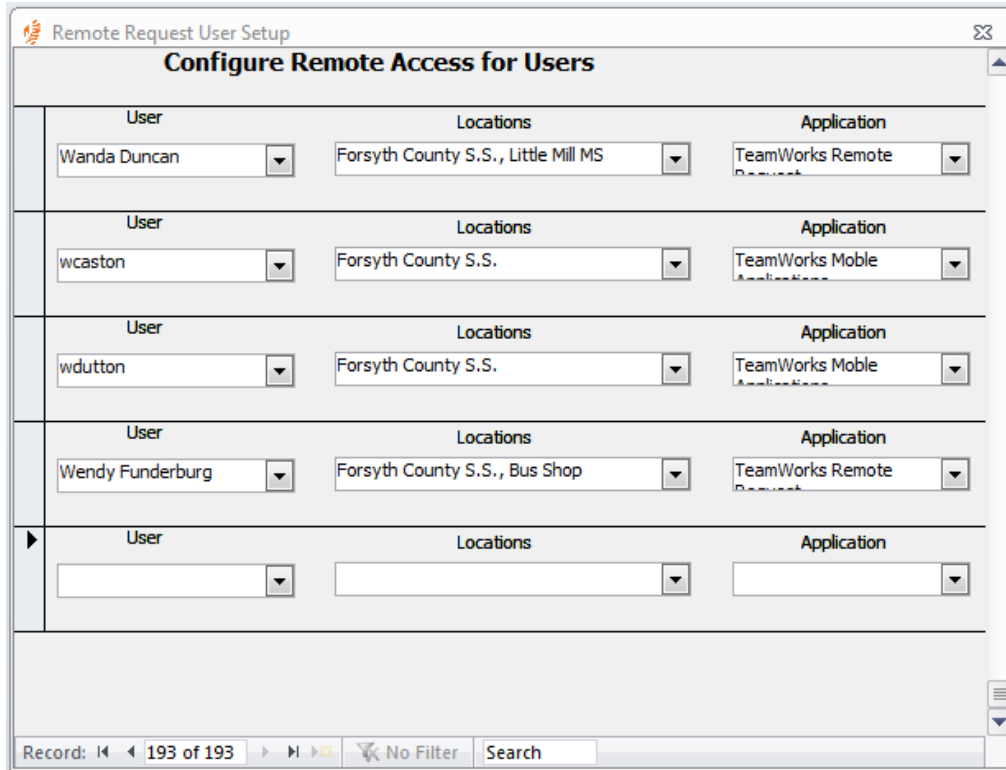
The image shows a Windows-style dialog box titled "Login Information". It has a light blue header bar with a small icon on the left and a close button on the right. Below the header, there are two labels with corresponding dropdown menus. The first label is "SQL Server Location:" and the dropdown menu shows "(local)". The second label is "Database Name:" and the dropdown menu shows "sndata". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

SQL Server Location – enter the SQL server DNS or IP you are connecting to

Database Name – enter or select the name of the database you are connecting to

Configure Path Access

Used primarily for determining which user accounts have rights to which locations. This is used for Remote Request and Mobile Applications. *NOTE: Remote Access can also be set up using the WEB Control Panel. You must be an administrator in order to access the page.*



User	Locations	Application
Wanda Duncan	Forsyth County S.S., Little Mill MS	TeamWorks Remote Request
wcaston	Forsyth County S.S.	TeamWorks Mobile Applications
wdutton	Forsyth County S.S.	TeamWorks Mobile Applications
Wendy Funderburg	Forsyth County S.S., Bus Shop	TeamWorks Remote Request

Record: 193 of 193 | No Filter | Search

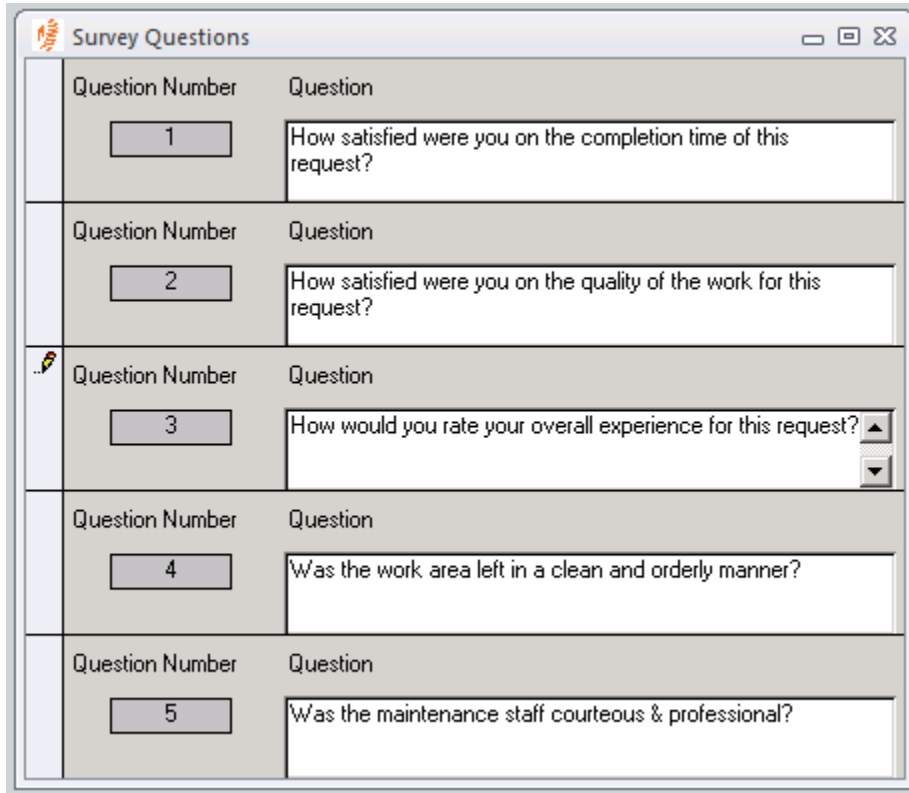
User – select or enter the username of the person you are giving rights to

Locations – enter or select the location(s) for this person.

Application – Select the application for which the selected user has access to the selected location.

Configure Work Order Survey

One feature in the Work Order module is that it allows you to email a survey directly to a person requesting feedback upon completion of any given work order. The system will format an RTF file, which can be opened with any standard word processing application.



Question Number	Question
1	How satisfied were you on the completion time of this request?
2	How satisfied were you on the quality of the work for this request?
3	How would you rate your overall experience for this request?
4	Was the work area left in a clean and orderly manner?
5	Was the maintenance staff courteous & professional?

Question Number 1 – 3 – Type in the questions you would like to ask for feedback. (**Note:** These questions are for 1 -5 ratings, 1=Lowest and 5=Highest rating)

Question Number 4-5 – These questions are for Yes/No responses.

Example of a Survey

Work Order Survey

Facility Management Software

TeamWORKS Solutions, Inc

Work Order ID: 382714

Date Received: 8/2/2012

Date Completed: 10/10/2012

Status: Complete

Description: Please paint the wall by the gym where the water fountain was removed.

Action Taken:

Please rate the following so that we may serve you better.
1 = Lowest Score through 5 = Highest Score


	Poor		Average		Excellent	
	1	2	3	4	5	
How satisfied were you on the completion time of this request?	1	2	3	4	5	
How satisfied were you on the quality of the work for this request?	1	2	3	4	5	
How would you rate your overall experience for this request?	1	2	3	4	5	
Was the work area left in a clean and orderly manner?	Yes	No				
Was the maintenance staff courteous & professional?	Yes	No				

Please enter any comments below:

Please fax this form back to the Maintenance Department at

WEB Control Panel

The WEB Control Panel is used for adding Users to the system, setting and resetting passwords and assigning rights to the TeamWORKS applications. You will be redirected to login to TeamWORKS WEB. Control Panel is only available as a web application.



The screenshot shows a login page with a blue border. At the top center, it says "Please Log In". Below that, there are two input fields: "User Name:" and "Password:". Under the password field is a "Log In" button. A yellow key icon is positioned at the bottom left corner of the page frame. Below the frame, the text "Welcome to the Login Page." is displayed.

NOTE: See WEB Control Panel User Guide for detailed instructions.

Location Information

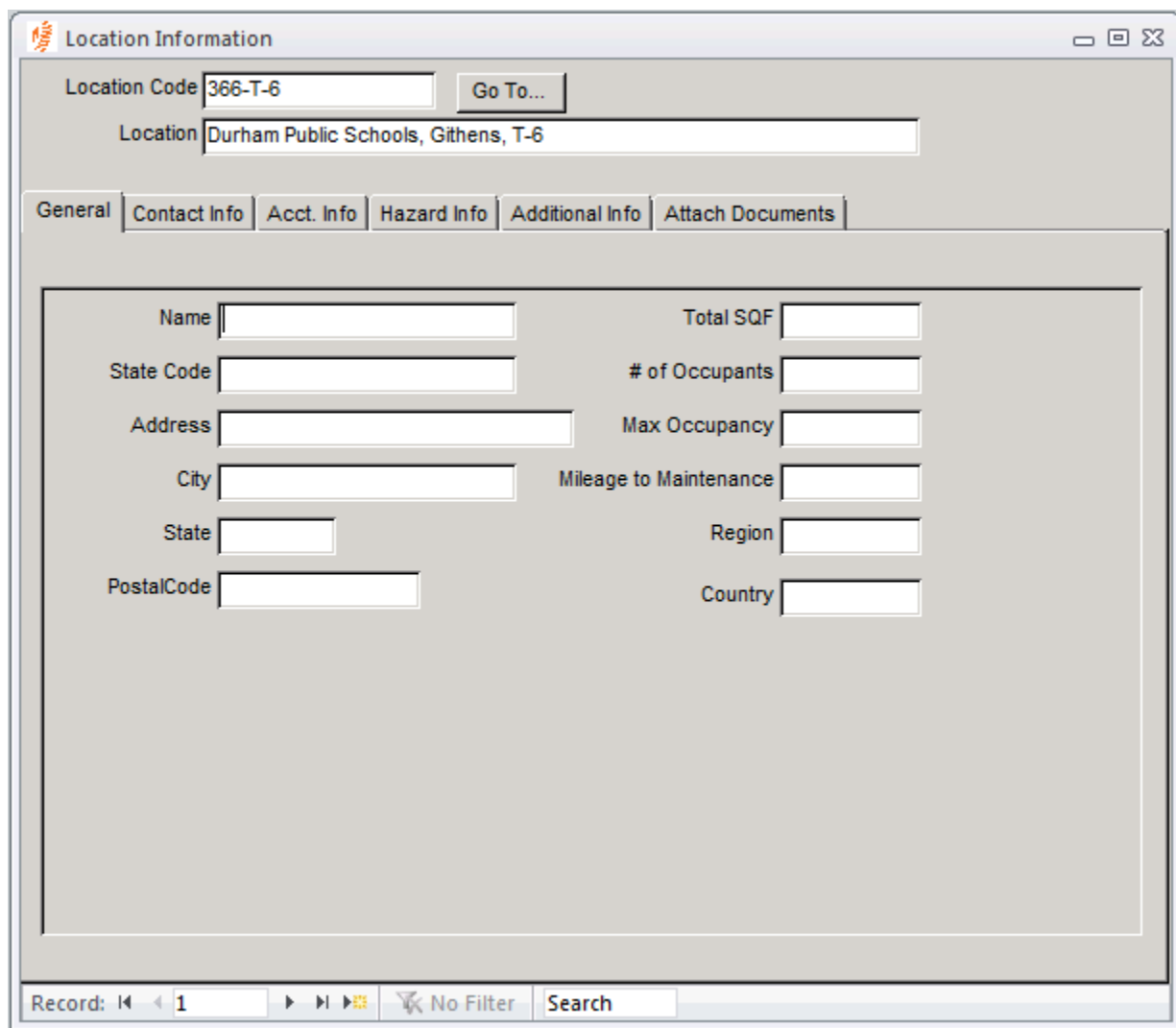
Location Information is where information is kept for each location that is set up through the Location Editor. Locations can only be added through the WEB Location Editor.

Location Code – indicates the location code of the current record

Go To Button – click this button to go to another location

Location – indicates the location name of the current record

General Tab



The screenshot shows a web application window titled "Location Information". At the top, there is a "Location Code" field containing "366-T-6" and a "Go To..." button. Below this is a "Location" field containing "Durham Public Schools, Githens, T-6". A tabbed interface is visible with the "General" tab selected. The form contains the following fields:

Name	Total SQF
State Code	# of Occupants
Address	Max Occupancy
City	Mileage to Maintenance
State	Region
PostalCode	Country

At the bottom of the window, there is a record navigation bar showing "Record: 1" and a "Search" button.

Name – the name of location

State Code – enter the State assigned Code for this location

Address – enter the address for this location

City – enter the City for this location

State – enter the State for this location

Postal Code – enter the postal code for this location

Total SQF – enter the total square footage for this location

of Occupants – enter the current enrollment for this location

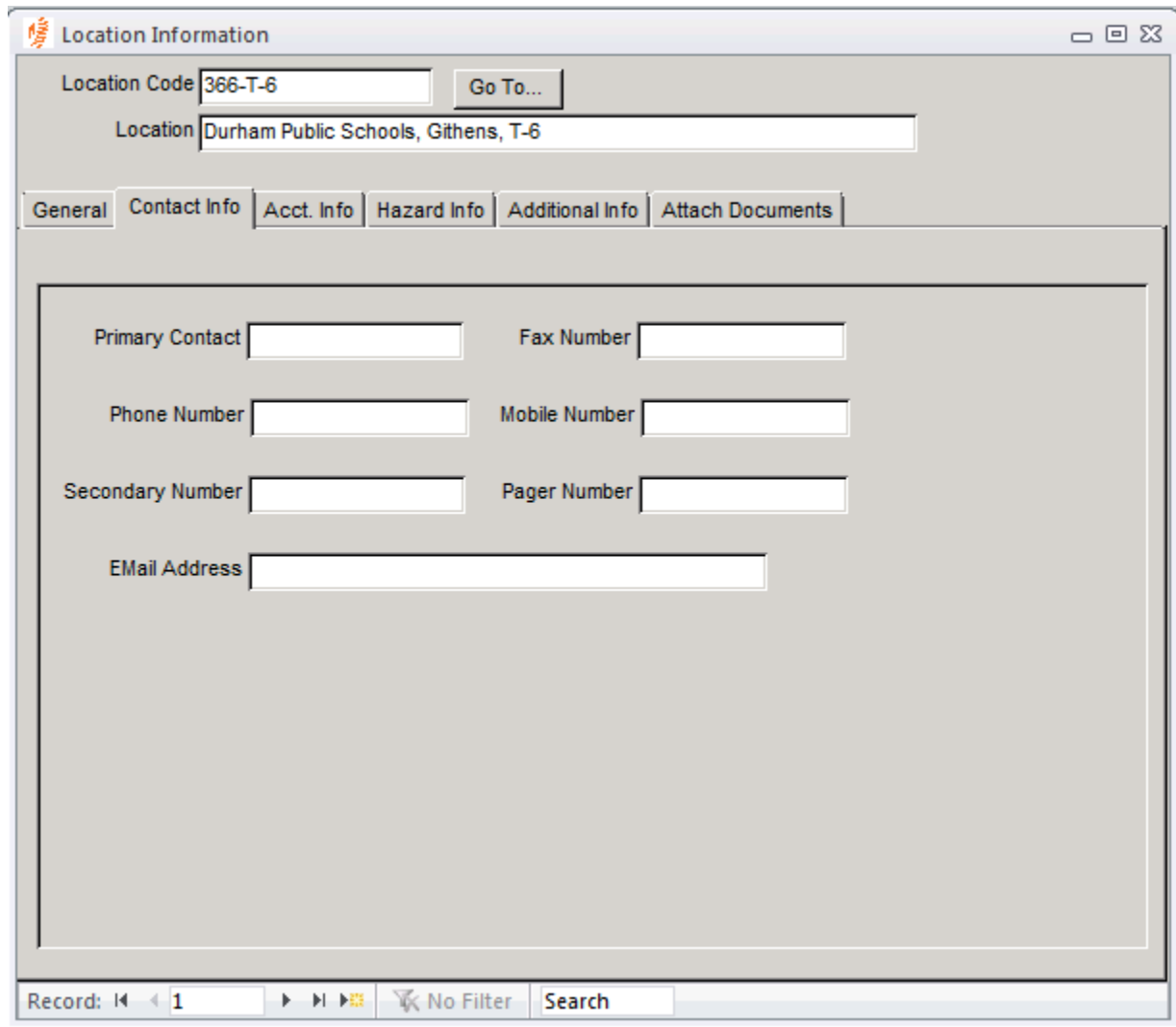
Max Occupancy – enter the maximum occupancy for this location

Mileage to Maintenance – enter the mileage to the maintenance department from this location

Region – enter the Region for this location

Country - enter the Country for this location

Contact Info Tab



Location Code:

Location:

General | **Contact Info** | Acct. Info | Hazard Info | Additional Info | Attach Documents

Primary Contact: Fax Number:

Phone Number: Mobile Number:

Secondary Number: Pager Number:

EMail Address:

Record: No Filter

Primary Contact – enter the primary contact for this location

Phone Number – enter the main phone number for this location

Secondary Number – enter a secondary phone number for this location

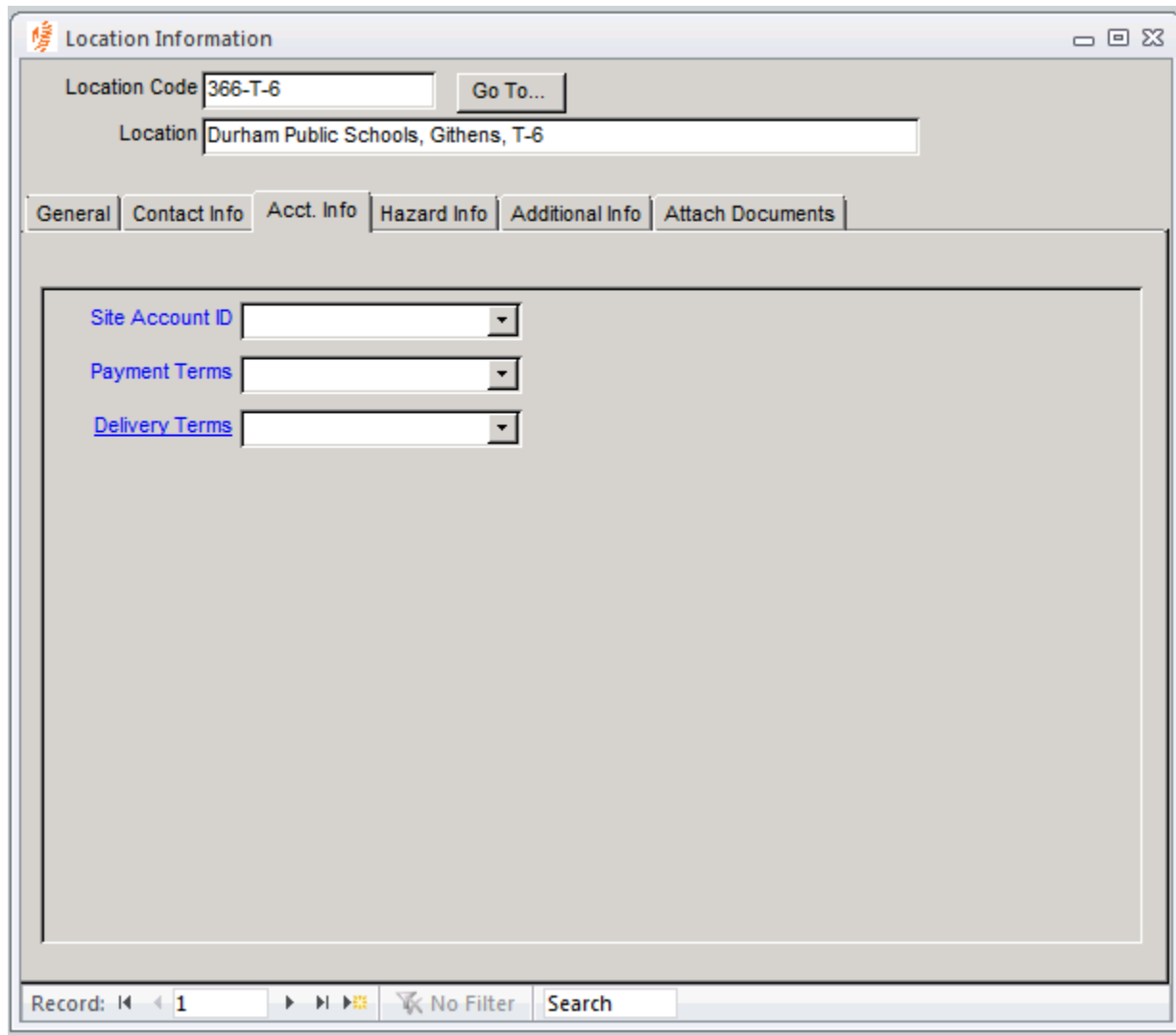
Email Address – enter the email address of the primary contact for this location

Fax Number – enter the fax number for this location

Mobile Number – enter the mobile number for the primary contact for this location

Pager Number – enter the pager number for the primary contact for this location

Acct. Info Tab



The screenshot shows a web application window titled "Location Information". At the top, there is a "Location Code" field containing "366-T-6" and a "Go To..." button. Below that is a "Location" field containing "Durham Public Schools, Githens, T-6". A horizontal menu contains tabs for "General", "Contact Info", "Acct. Info", "Hazard Info", "Additional Info", and "Attach Documents". The "Acct. Info" tab is selected, showing three dropdown menus: "Site Account ID", "Payment Terms", and "Delivery Terms". At the bottom of the window, there is a record navigation bar with "Record: 1", a "No Filter" button, and a "Search" button.

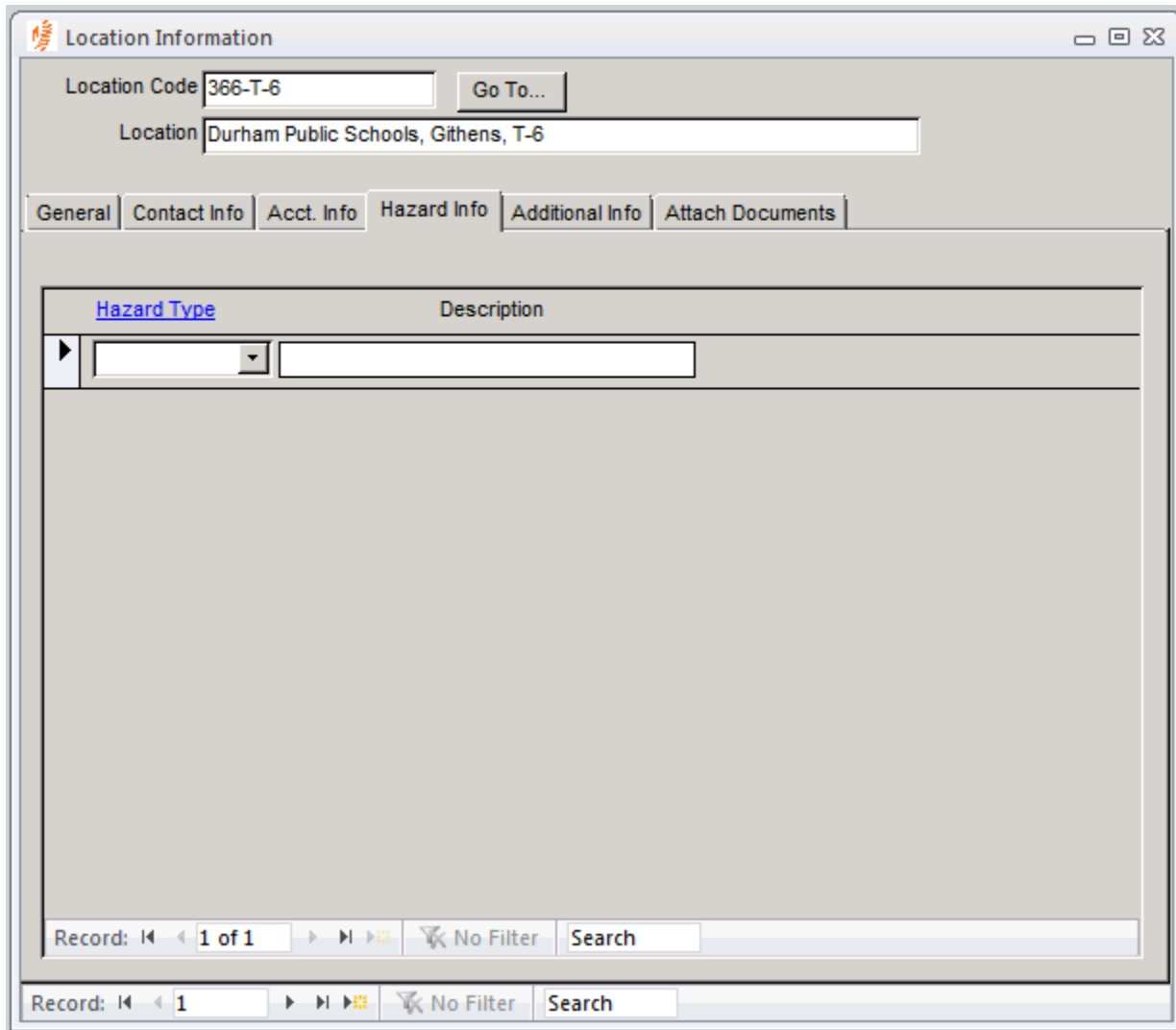
Site Account ID – enter a site account number for this location. The accounts in this drop-down list are created in the Accounts Form

Payment Terms – identify the payment terms such as Net 30 for this location.

Delivery Terms – identify the delivery terms for this location

Hazard Info Tab

Keep track of different types of hazards at this location



Location Code: 366-T-6 [Go To...]

Location: Durham Public Schools, Githens, T-6

General | Contact Info | Acct. Info | **Hazard Info** | Additional Info | Attach Documents

Hazard Type	Description
▼	

Record: 1 of 1 [Navigation icons] [No Filter] [Search]

Record: 1 [Navigation icons] [No Filter] [Search]

To add a new Hazard Type, click on the Hazard Type hyperlink

Hazard Type – enter or select a Hazard Type for this location. Click the Hazard Type Link to enter or view existing Hazard Types.

Description – indicates description for the Hazard Type selected

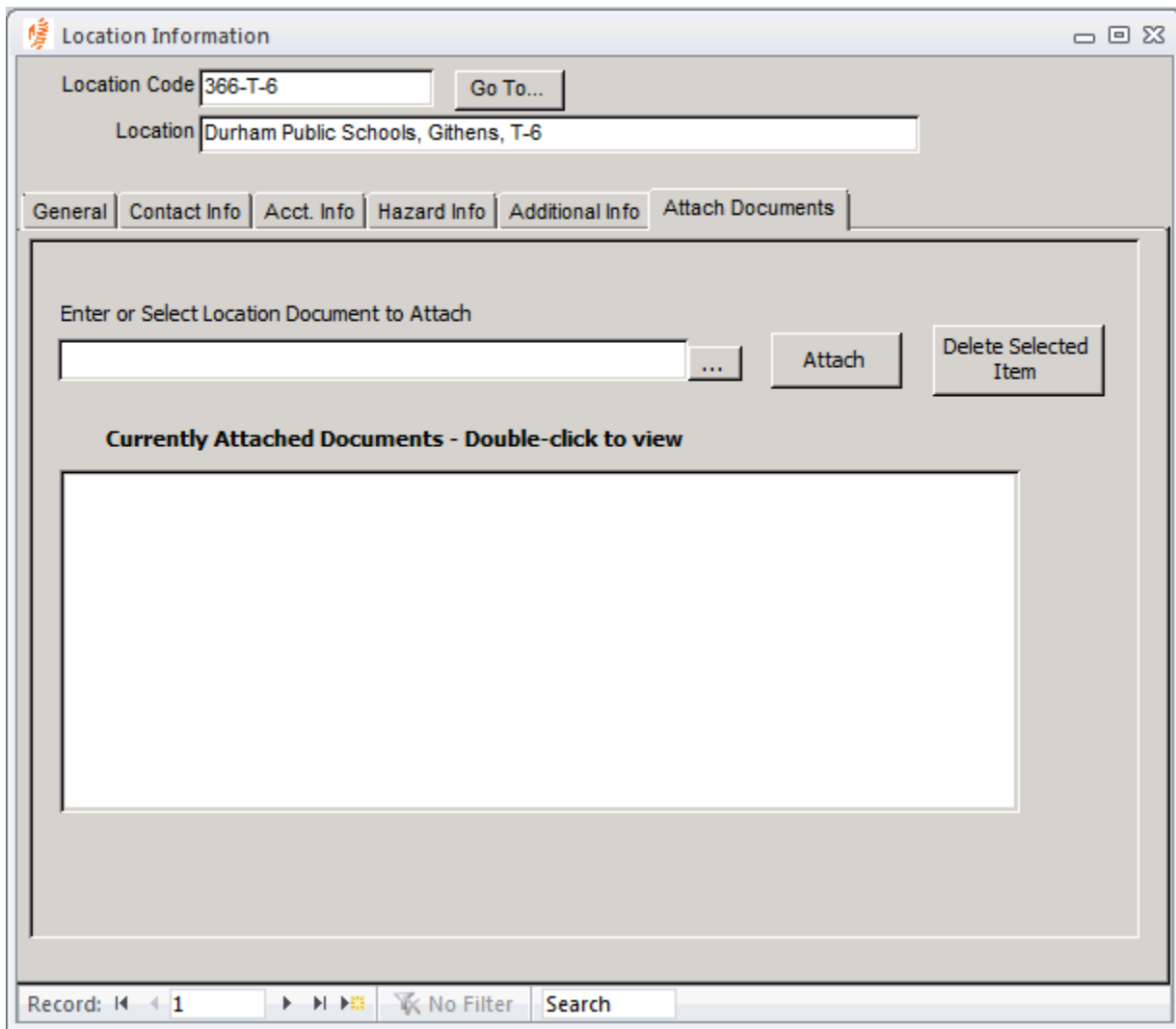
Additional Info Tab

Enter any generic notes regarding this location

The screenshot shows a software window titled "Location Information". At the top left, there is a small icon and the title. Below the title bar, there are two input fields: "Location Code" containing "366-T-6" and "Location" containing "Durham Public Schools, Githens, T-6". A "Go To..." button is positioned to the right of the "Location Code" field. Below the input fields is a horizontal tabbed interface with six tabs: "General", "Contact Info", "Acct. Info", "Hazard Info", "Additional Info", and "Attach Documents". The "Additional Info" tab is currently selected and active. The main content area of the window is a large, empty rectangular text box with a vertical scrollbar on the right side. At the bottom of the window, there is a record navigation bar. It includes a "Record:" label, a set of navigation arrows, the number "1", a "No Filter" button with a filter icon, and a "Search" button.

Attach Documents Tab

Attach any documents regarding this location.



The screenshot shows a software window titled "Location Information" with a standard Windows-style title bar. The window is divided into several sections:

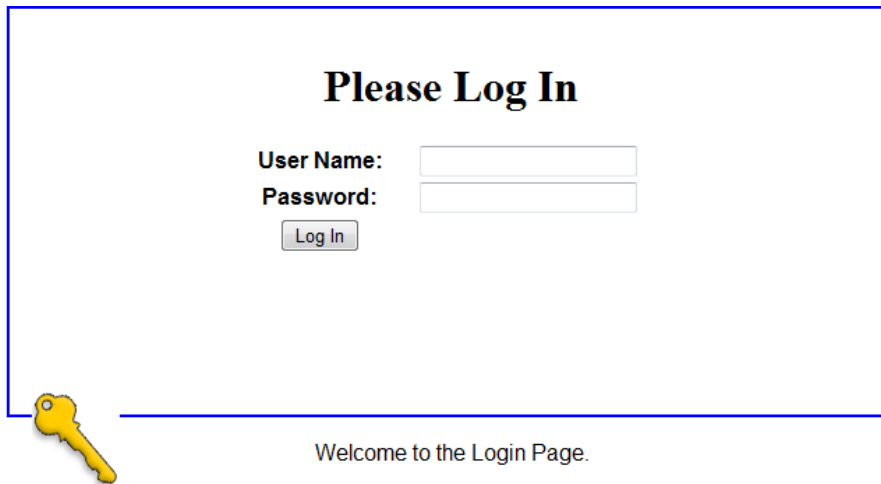
- Header:** "Location Code" with the value "366-T-6" and a "Go To..." button. Below it, "Location" with the value "Durham Public Schools, Githens, T-6".
- Navigation Tabs:** A row of tabs including "General", "Contact Info", "Acct. Info", "Hazard Info", "Additional Info", and "Attach Documents" (which is currently selected).
- Main Content Area:**
 - A label "Enter or Select Location Document to Attach" above a text input field with a browse button "...".
 - Buttons for "Attach" and "Delete Selected Item" to the right of the input field.
 - A section titled "Currently Attached Documents - Double-click to view" followed by a large, empty rectangular area for displaying document thumbnails.
- Footer:** A record navigation bar showing "Record: 1" with navigation icons, a "No Filter" indicator, and a "Search" input field.

Location Editor

The Location Editor is used to create, modify or move locations in your path tree. Path Structure can be built out to only specific campuses or all the way down to the room level. Although it is more tedious to go to the room level, there are advantages in doing so. Going to room level in your path structure will allow you to track attributes such as assets, building requests or work orders to a specific location.

*** If you need to delete a location (not recommended), it is advised that you contact a TeamWORKS Representative before you delete.**

You will be redirected to login to TeamWORKS WEB. Location Editor is only available as a WEB application.



Please Log In

User Name:

Password:

Welcome to the Login Page.

Note: See WEB Location Editor User Guide for detailed instructions

System Configuration

Work Order System Configuration
⌵

Field Settings

Defaults, Tabs, and Required Fields are set on each form by selecting the 'Config' button

Use Locally Set Defaults?

Show all Work Orders when form opens?

Show Room Number

Use Event Scheduling Location Security

Always Issue Inventory at last received cost

Bypass Material Delay status for Inventory Requests

Allow Inventory to have Negative On Hand Balance

Verify required fields on Submitted Work Requests

Allow Duplicate Asset Tag Numbers

Use Subtrade for Purpose Code

Link Secondary Database

Mailer Options

Use My Email Program

Use TeamWORKS Mailer

Enter Work Order Email "From" email address

Enter Work Order Email Subject

Work Order Format

WOGenerateForm1

Custom Label

Purpose Code

Fax Number for Survey

Enter or Select Location for Attaching Documents

Transactions

I want to track Labor costs.....

I want to track Inventory Issued.....

I want to track Purchased Materials.....

I want to track Vehicle Travel.....

Report Headings

Report Heading 1

Report Heading 2

TeamWORKS URL

Enter Location of Local TeamWORKS Web Applications

System Configuration is used to set certain options globally for TeamWORKS client users.

Field Settings

Use Locally Set Defaults? – Several forms throughout the client application allow for custom settings based on user login. With this check box, Administrators can determine whether or not to allow each user to define their own default values, tab stops, etc. throughout the modules. Checking this box allows users to set their own values. Unchecking will use the Administrators preferences as global default. *NOTE: Local Defaults are not available to hosted "Virtual" clients.*

Show All Work Order when form opens? - check this box to open the main work order form unfiltered (showing all work orders) or leave it unchecked to open up to a new work order record.

Show Room Number – check this box to show the room number field on the work order main form and the asset main form. Leave unchecked if your path structure is down to the room level.

Use Event Scheduling Location Security – check this box if you want to limit users of the Event Scheduling Module to specific locations in the client application. If checking this, you must configure a location or locations for each user in their user profile in Control Panel. *NOTE: not available to hosted “Virtual” Clients.*

Always issue inventory at last received cost – check this if you want to issue inventory from the warehouse inventory module at the last received cost. This will override the cost averaging when inventory is received. To continue using cost averaging, leave this box unchecked.

Bypass Material Delay Status for Inventory Requests – by default, if an inventory request comes in from Remote Request and there is not enough of that item to fill their request, the system will automatically place that item on backorder. Checking this option will override this option allowing the user to go into the negative with each request.

Allow Inventory to have Negative On Hand Balance – check this if you want to allow your inventory balances to show quantities on hand less than zero. Otherwise, leave unchecked and the system will prompt the user that there is not enough of that item on hand to issue.

Verify required fields on submitted work order requests – This option allows the customer to choose whether the system enforced required fields for a work request or not regardless of status.

Allow Duplicate Asset Tag Numbers – This option allows the customer to allow duplicate asset tag numbers.

Use Subtrade for Purpose Code – This option allows the customer to associate Trades with Purpose Codes.

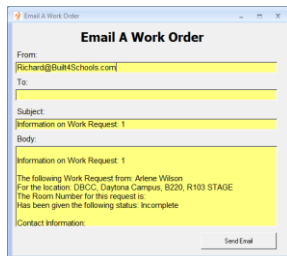
Link Secondary Database – This new option allows the customer to choose a second database to forward work orders. For example: the maintenance department and IT department both use TeamWORKS and the maintenance department gets a request that should have been routed to IT. Now maintenance can actually forward that work order to the IT database.

Emailer Options

Enter Work Order Email 'From' email address – client users can email work orders back to individuals and/or auto-reply to requestors when work order statuses change. Enter a 'from' email address indicating who is sending the email

Enter Work Order Email subject – enter a subject for the auto-replies or emails back to requestors.

Use TeamWORKS Emailer –select the radio button option if you would like to use the system email form when email work orders or Use My Email Program if you want to use our default email client such as Outlook or GroupWise. An example of the system email form is below.



Work order Format

Select the preferred option when printing out work orders. If the use locally set defaults checkbox is checked, the user will be able to specify which their preferred format is.

Custom Label

By default, there is a Purpose Code field on the work order form. Changing this 'Purpose Code' label here will change the label on the form allowing for a more customized field for each district.

Fax Number for Survey

When creating a Work order Survey from the main form, the recipient is asked to fill out the survey and fax back to a specific number. Enter that fax number here.

Enter or Select Location for Attaching Documents

The work order manger now allows users to attach documents to any given work order in the client. Here you can specify where you want these documents to be stored; typically on a server such as <\\servername\WODocuments>

Transactions

I want to track Labor Costs – check this to show the Labor tab under Transactions from the main work order form

I want to track Inventory Issues – check this to show the Inventory tab under Transactions from the main work order form

I want to track Purchased Materials - check this to show the Purchases tab under Transactions from the main work order form

I want to track Vehicle Travel - check this to show the Vehicle Travel tab under Transactions from the main work order form

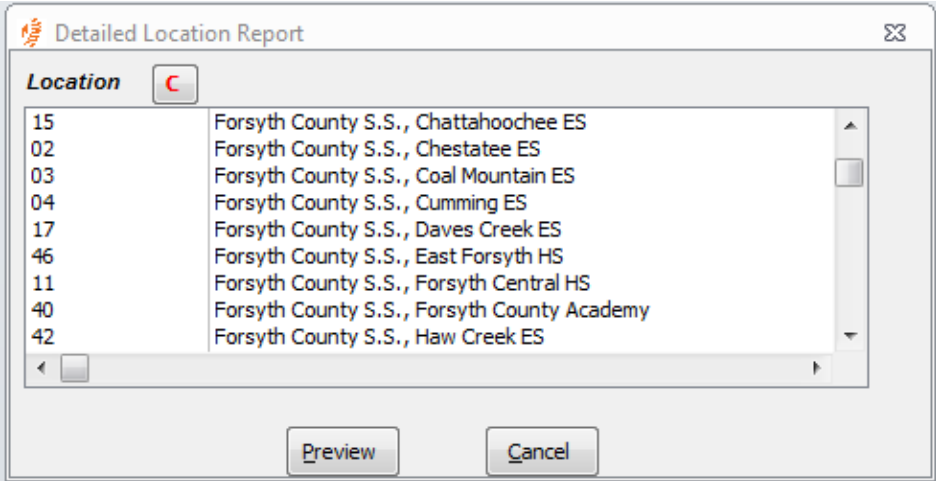
Report Headings

Enter a top heading and a bottom heading to show on all TeamWORKS generated reports through the client.

TeamWORKS URL – Enter DNS or IP of TeamWORKS Web Applications. TeamWORKS uses this to access the WEB Control Panel and WEB Location Editor.

Reports

Detailed Location Report – Provides details for the specific location(s) selected. Details include all the information contained in Location information.



Detailed Location Report										TeamWORKS Solutions, Inc Facility Management Software				
Address	City	State	Zip	Primary Contact	Phone Number	Fax Number	Pager Number	State Code	Occupancy	Max Occ. SQF	Notes	Secondary Number	Mobile Number	E Mail Address
Location: Forsyth County S.S.										Location ID: FCSS				
441 Canton Hwy	Cumming	GA	30040		7707814889	6785133877		8014	0	0	0			
Location: Forsyth County S.S., Big Creek ES										Location ID: 01				
1994 Peachtree Parkway	Cumming	GA	30041		7708874584	7707812247		1050	0	0	98235			

System Security Report – Shows a list of users and their security groups.

System Security Report		TeamWORKS Solutions, Inc Facility Management Software	
User ID Description	Security Group(s)	User ID/ Description	Security Group(s)
Alyssa Degliumberto John's Creek Principal	SNMMRL-WO-User	Barbara Martin Coal Mountain Kitchen Manager	SNMMRL-WO-User
Amanda Evans SFMS Head Custodian	SNMMRL-WO-User	bcarlisle GIS -- PDC	

Customer Support

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