



# 5.0 User Guide

## C/S Codes Manager



[www.goTeamWORKS.com](http://www.goTeamWORKS.com)

Email: [support@goTeamWORKS.com](mailto:support@goTeamWORKS.com)

Toll Free Phone: 866-892-0034

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# Codes Manager

Codes Manager combines most of the smaller codes forms into a single access point.

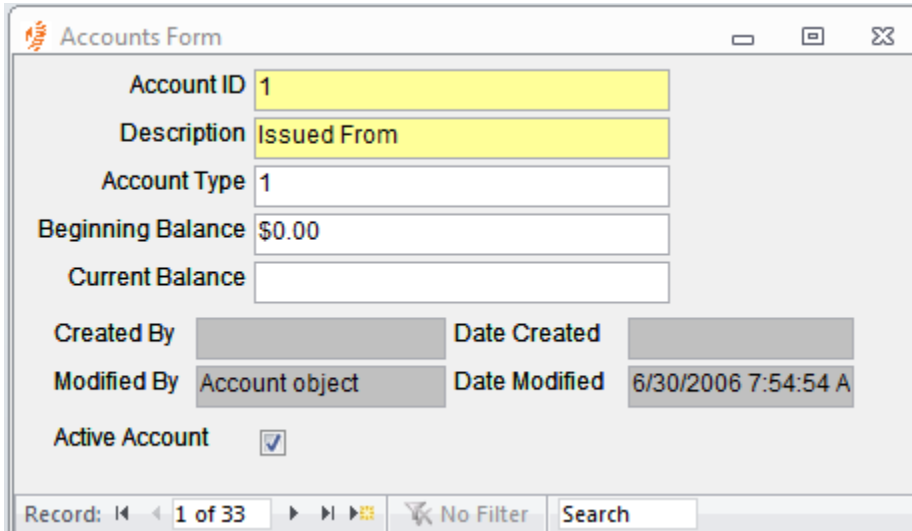


The screenshot shows the 'Teamworks Classic Main Switchboard' window. On the left is a vertical menu with buttons for Assets, Attendance, Codes (highlighted), Employees and Vendors, Event Scheduler, Inventory, Keys Manager, Preventive Maintenance, Utility Tracking, Vehicle Fuel Tracking, Work Orders, and Administrator. The main area is titled 'Codes Manager' and is divided into two columns: 'Forms' and 'Reports'. The 'Forms' column lists Account Codes, Budget Codes, Departments, Employee Types, Priority Codes, Project Codes, Purpose Codes, and Trade Codes. The 'Reports' column lists Accounts Report, Budget Codes Report, Departments Report, Project Codes Report, Purpose Code Report, and Trade Codes Report. At the bottom, it shows connection information: 'Connected To Server: NIKE\SQL2005 Database: Nsyracuse', a support link 'Email TeamWORKS Support', and the date 'Today is Thursday, September 08, 2011'.

# Forms

## Accounts Codes

Add account codes for charging money accounts. Adding an account code here populates the Paid From and Charged To drop-down boxes



The screenshot shows a window titled "Accounts Form" with the following fields and values:

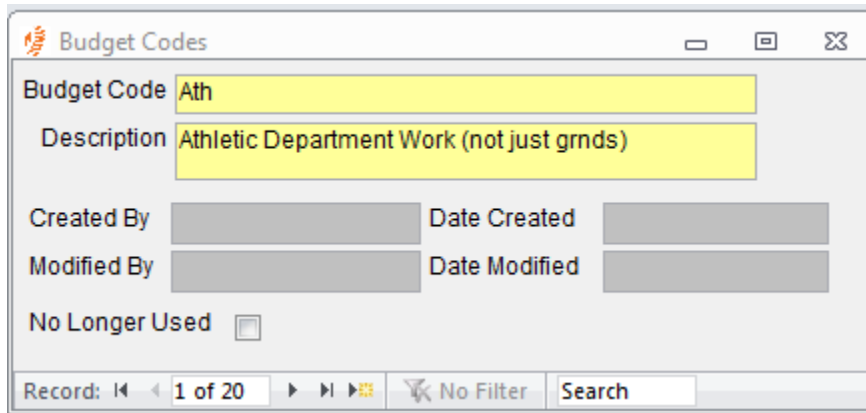
- Account ID: 1
- Description: Issued From
- Account Type: 1
- Beginning Balance: \$0.00
- Current Balance: (empty)
- Created By: (empty)
- Date Created: (empty)
- Modified By: Account object
- Date Modified: 6/30/2006 7:54:54 A
- Active Account:

At the bottom of the window, there is a record navigation bar showing "Record: 1 of 33", "No Filter", and a "Search" button.

- Account ID – enter an account Number for this account
- Description – enter a description for this account
- Account Type – enter an account type for this account
- Beginning Balance – enter a beginning balance for this account
- Current Balance – enter current balance if creating a new account. This field updates when costs are tied to it on the Paid From or Charged To
- Created By – auto populated field showing who created this account
- Date Created – auto populated field showing date account was created
- Modified By – auto populated field showing who made last modification to account
- Date Modified – auto populated field showing date of last modification to account
- Active Account – Check if the account is active

## Budget Codes

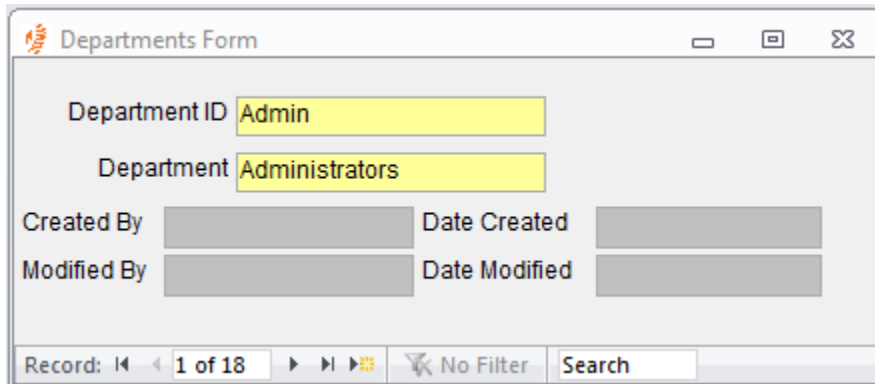
Add a budget code to keep track of work orders tied to a specific budget. This is not a debit/credit account



- Budget Code – enter a Budget Code for this Budget
- Description – enter a description for this budget code
- Created By – auto populated field showing who created this budget code
- Date Created – auto populated field showing date budget code was created
- Modified By – auto populated field showing who made last modification to budget code
- Date Modified – auto populated field showing date of last modification to budget code
- No Longer Used– Check if the budget code is no longer active

## Departments

Add departments so you can separate work orders and assigned assets to a specific department



The screenshot shows a window titled "Departments Form" with a standard Windows-style title bar (minimize, maximize, close buttons). The form contains the following fields:

- Department ID: Admin
- Department: Administrators
- Created By: (empty)
- Date Created: (empty)
- Modified By: (empty)
- Date Modified: (empty)

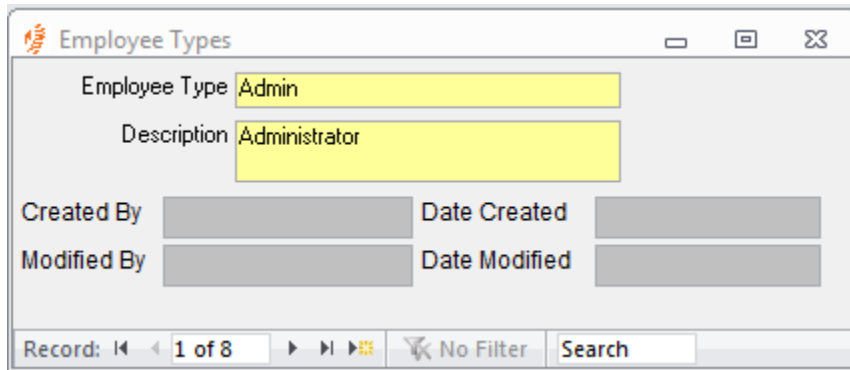
At the bottom of the form, there is a record navigation bar with the following elements:

- Record: 1 of 18
- No Filter
- Search

- Department ID – enter a Department Code for this department
- Department – enter a description for this department
- Created By – auto populated field showing who created this Department Code
- Date Created – auto populated field showing date Department Code was created
- Modified By – auto populated field showing who made last modification to Department Code
- Date Modified – auto populated field showing date of last modification to Department Code

## Employee Types

Enter Employee Types for tracking certain types of employees (i.e. Full Time, Part time, summer help, etc.)



- Employee Type – enter an Employee Type Code for this Employee Type (i.e. FT, PT)
- Description – enter a description for the Employee Type (i.e. Full Time, Part Time, etc.)
- Created By – auto populated field showing who created this Employee Type
- Date Created – auto populated field showing date Employee Type was created
- Modified By – auto populated field showing who made last modification to Employee Type
- Date Modified – auto populated field showing date of last modification to Employee Type

## Priority Codes

This is used for establishing the priority of work to be complete.

The screenshot shows a window titled "Work Order Priorities" with a close button in the top right corner. The form contains the following fields:

- Priority Code: Emerg
- Description: Emergency
- Standard Completion: 1 day
- Created By: (empty)
- Date Created: (empty)
- Modified By: (empty)
- Date Modified: (empty)
- No Longer Used:

At the bottom of the window, there is a footer bar with the following elements:

- Record: 1 of 6
- No Filter
- Search

- Priority Code – enter a Priority Code for this Priority Code
- Description – enter a description for this Priority Code
- Standard Completion – enter completion time for this Priority Code
- Created By – auto populated field showing who created this account
- Date Created – auto populated field showing date Priority Code was created
- Modified By – auto populated field showing who made last modification to Priority Code
- Date Modified – auto populated field showing date of last modification to Priority Code
- No Longer Used – check if the Priority Code is no longer used



## Projects Codes

You may want to create projects if you are going to track work tied to things like renovations, building additions, or event schedules.

The screenshot shows a 'Projects Form' window with the following fields and values:

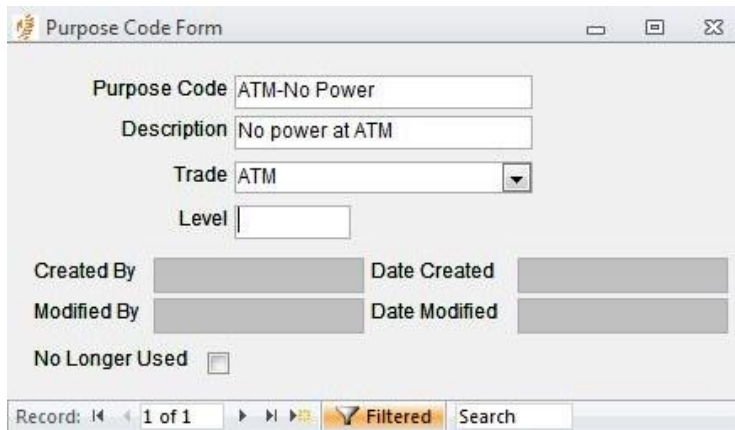
- Project ID: CAPREP
- Proj. Name: Capital Proj Repairs
- Lead: J Ward
- Description: Repairs to work that contractors left incomplete and was
- Notes: (empty)
- Created By: (greyed out)
- Date Created: (greyed out)
- Modified By: (greyed out)
- Date Modified: (greyed out)
- No Longer Used:

The bottom status bar displays: Record: 1 of 30, Unfiltered, and a search field.

- Project ID – enter a Project ID for this Project
- Project Name – enter a name for this project.
- Lead – enter the name of the person taking the lead on this project (i.e. Project Manager)
- Description – enter a description for this project
- Notes – enter generic notes regarding this project
- Created By – auto populated field showing who created this project
- Date Created – auto populated field showing date project was created
- Modified By – auto populated field showing who made last modification to project
- Date Modified – auto populated field showing date of last modification to project
- No Longer Used – check if the Project Code is no longer used

## Purpose Codes

Enter a Purpose code to track certain types of work orders. (I.e. Vandalism, ADA, Food Service, etc.)



The screenshot shows a 'Purpose Code Form' window. It has the following fields and controls:

- Purpose Code:** Text input field containing 'ATM-No Power'.
- Description:** Text input field containing 'No power at ATM'.
- Trade:** Dropdown menu with 'ATM' selected.
- Level:** Text input field.
- Created By:** Text input field.
- Date Created:** Text input field.
- Modified By:** Text input field.
- Date Modified:** Text input field.
- No Longer Used:** A checkbox that is currently unchecked.

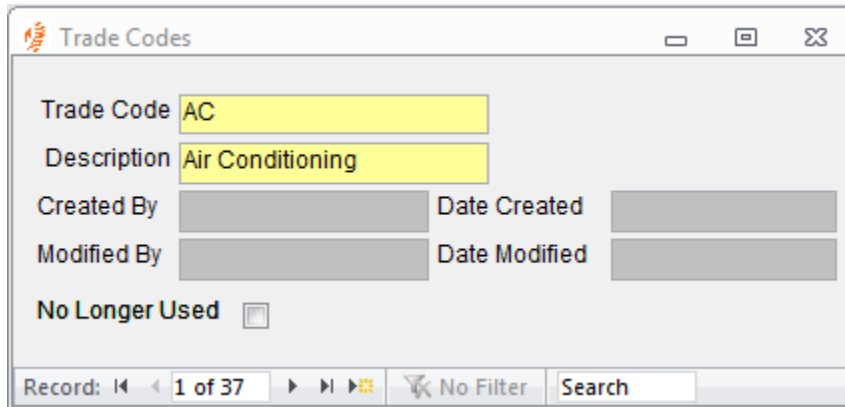
At the bottom of the form, there is a status bar with the following elements:

- Record: 1 of 1
- Filtered (with a dropdown arrow)
- Search (with a search icon)

- Purpose Code – enter a Purpose Code for this Purpose
- Description – enter a description for this purpose code
- Trade – This associates the purpose code for this selected trade
- Level – This is only used for Dispatch. This will associate this purpose code with the desired level
- Created By – auto populated field showing who created this purpose code
- Date Created – auto populated field showing date purpose code was created
- Modified By – auto populated field showing who made last modification to purpose code
- Date Modified – auto populated field showing date of last modification to purpose code
- No Longer Used – check if the purpose code is no longer used

## Trade Codes

Trade codes can separate work orders into various trades.



The screenshot shows a window titled "Trade Codes" with a standard Windows-style title bar (minimize, maximize, close). The form contains the following fields:

- Trade Code: AC
- Description: Air Conditioning
- Created By: [Greyed out]
- Date Created: [Greyed out]
- Modified By: [Greyed out]
- Date Modified: [Greyed out]
- No Longer Used:

At the bottom of the window is a navigation bar with the following elements:

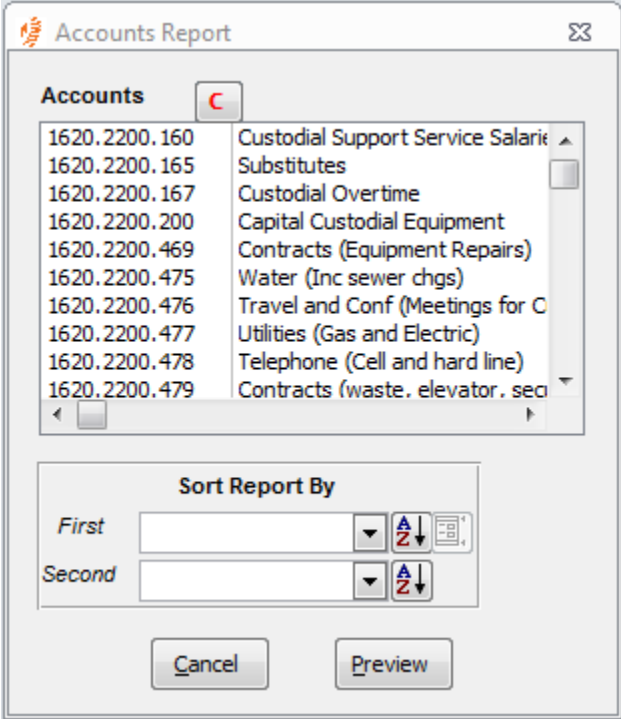
- Record: 1 of 37
- Navigation icons: back, forward, search, refresh
- Filter: No Filter
- Search: [Search box]

- Trade Code – enter a Trade Code for this Trade
- Description – enter a description for this trade code
- Created By – auto populated field showing who created this purpose code
- Date Created – auto populated field showing date purpose code was created
- Modified By – auto populated field showing who made last modification to purpose code
- Date Modified – auto populated field showing date of last modification to purpose code
- No Longer Used – check if the purpose code is no longer used

# REPORTS

## ACCOUNT REPORT

This report will show all Account Codes, a description, a beginning balance and a current balance of each code.



<b>Account Codes Report</b>			TeamWORKS Solutions, Inc Facility Management Software	
<b>Account ID</b>	<b>Description</b>	<b>Beginning Balance</b>	<b>Current Balance</b>	
1	General Fund Account	\$0.00		
100-1-2600-410.0-01	Water & Sewer Big Creek ES	\$9,692.31	\$9,692.31	
100-1-2600-410.0-02	Water & Sewer Chestatee ES	\$9,692.31	\$9,692.31	
100-1-2600-410.0-03	Water & Sewer Coal Mountain ES	\$9,692.31	\$9,692.31	

## BUDGET CODES REPORT

This report will show all Budget Codes and a description

<b>Budget Codes Report</b>	
TeamWORKS Solutions, Inc Facility Management Software	
<b>Budget Code</b>	<b>Description</b>
CAPRW	Capital project related work
Dist Off	District Office Maintenance Work
EEW NB	Early Education routine work
NA	Not Used

## DEPARTMENTS REPORT

This report will show all Department ID's and Names.

<b>Departments Report</b>	
TeamWORKS Solutions, Inc Facility Management Software	
<b>Department ID</b>	<b>Department Name</b>
A-1 Hood Cleaning and Pressure Washing	A-1 Hood Cleaning and Pressure Washing
A-1 Phillips Painting	A-1 Phillips Painting
AAA Commercial Floors Inc.	AAA Commercial Floors Inc.
Absolute Contractors, Inc.	Absolute Contractors, Inc.

## PROJECT CODES REPORT

This report will show all Project Codes, Project ID, Project Name and Lead, Project Description and Notes.

<b>Project Codes Report</b>			
			TeamWORKS Solutions, Inc Facility Management Software
<b>Project ID</b>	<b>Project Name</b> <b>Project Lead</b>	<b>Project Description</b>	<b>Project Notes</b>
CW	CONTRACTED WORK	CONTRACTED WORK	All contracted work will be under this project ID. Emergency -Lump Sum- Unit Price work
GM	GENERAL MAINTENANCE	GENERAL MAINTENANCE	

## PURPOSE CODES REPORT

This report will show all Purpose Codes and a description.

<b>Purpose Code Report</b>		TeamWORKS Solutions, Inc Facility Management Software
<b>Code</b>	<b>Description</b>	
ADA	American Disability Act	
C & A	CHECK AND ADVISE - PROVIDE COST ESTIMATE	
CA	CAPITAL OUTLAY	
CM	CORRECTIVE MAINTENANCE	
CONST	CONSTRUCTION	



## TRADE CODES REPORT

This report will show all Trade Codes and a description

<b>Trade Codes Report</b>		TeamWORKS Solutions, Inc Facility Management Software
<b>Trade Code</b>	<b>Trade Description</b>	
C	Carpentry	
E	Electrical	
H	HVAC	
P	Plumbing	
WSC	Warranty/School Construction	

Customer Support

Email: [Support@goTeamWORKS.com](mailto:Support@goTeamWORKS.com)

Telephone: Toll Free (866) 892-0034