



5.0 User Guide

C/S Dispatch Manager



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NOTE: Prior to deploying the Dispatch Manager, Administrators must ensure employees are properly assigned to their respective trades. Employees must also be assigned to the proper zones associated with their assigned trades. Zones must be created with locations and employees assigned to each zone. The order of this user guide is presented with the actions to be taken prior to using Dispatch Manager.

Dispatch Manager

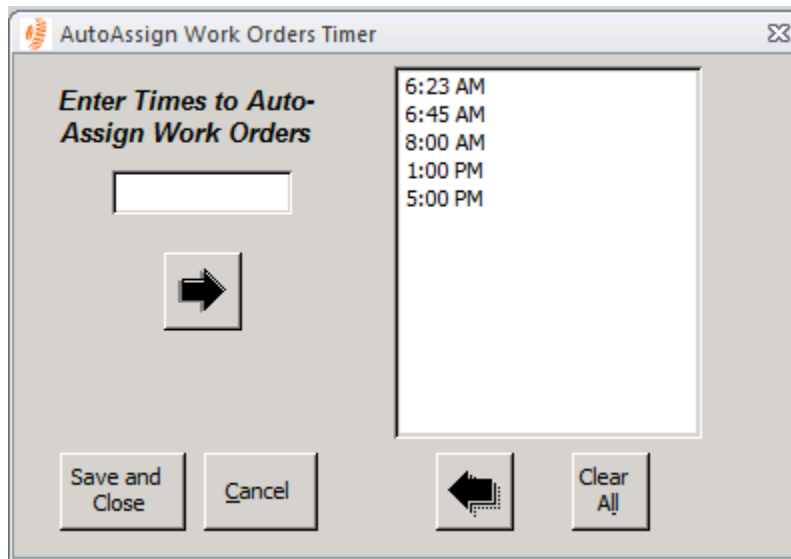


TeamWORKS Dispatch Manager is a database function that auto-assigns work orders to maintenance field technicians based on Zone and Trade specifications of approved work orders. Work orders are assigned first based on Priority, then Location, then Age. Work is distributed evenly among all workers in each zone for each trade.

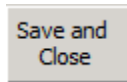
Configure Times to Assign Work

TeamWORKS System Administrators will have the ability to add times for auto assignment to run.

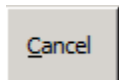
NOTE: Auto Assignment rules are created by TeamWORKS at the time of implementation.



- Button adds time entered into the list of auto assign run times.



- Button saves all changes and closes form.



- Button cancels all entries and returns form to original values.



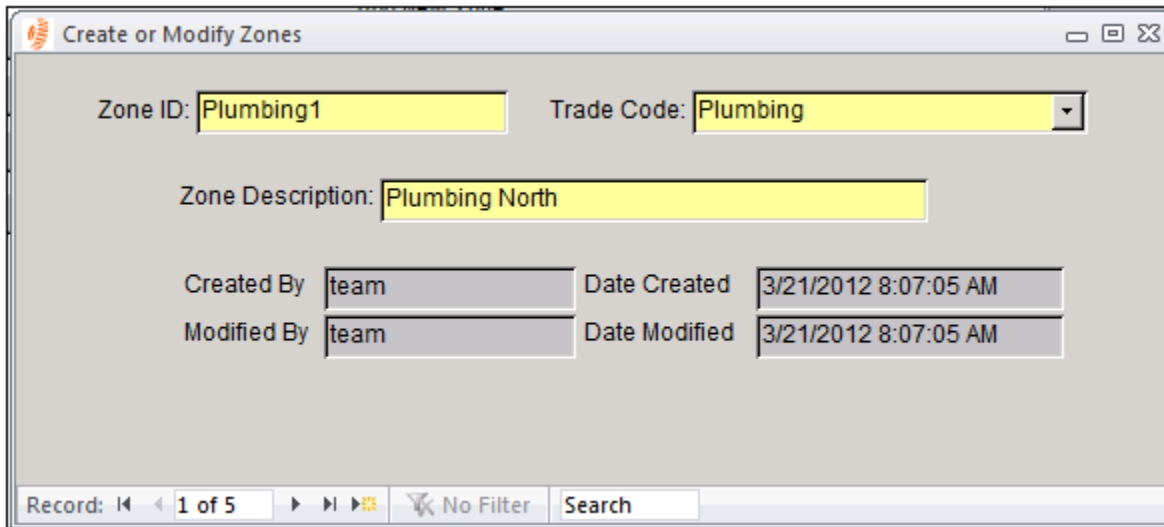
- Button removes the time(s) selected from the list of auto assign run times.



- Button clears all run times.

Create or Modify Zones

This form allows TeamWORKS System Administrators the ability to create Zones. Zones are created for each geographic area within an enterprise. You must create a zone for each trade that will manage work orders.



The screenshot shows a window titled "Create or Modify Zones". It contains the following fields:

- Zone ID:
- Trade Code:
- Zone Description:
- Created By:
- Date Created:
- Modified By:
- Date Modified:

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

- Record:
- No Filter
-

Zone ID – A short identifier representing an area within your enterprise (locations and trades will be attached to these zones for Work Order Assignment)

Trade Code - Indicates the trade specialty for the zone.

Zone Description – A descriptive identifier representing an area within your enterprise (locations and trades will be attached to these zones for Work Order Assignment)

Created By – Indicates the original creator of the record.

Date Created – This defaults to today's date when creating new zones. You can change this value.

Modified By – Indicated the **LAST** person to make a change to this Zone.

Date Modified – Used for indicating the **LAST** date changes were made to the zone.

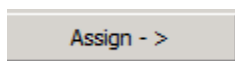
Location Zone Assignment

This form allows TeamWORKS System Administrators to assign Locations to newly created Zones.

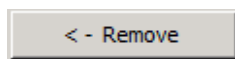
Assign To - Shows the current zone selected for the addition of locations within that zone.

Unassigned Locations List – Indicates all the Locations **NOT** currently assigned to a Zone.

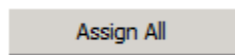
Current Zone Assignments – Indicates all the Locations that are currently assigned to the displayed Zone.



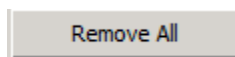
- Use this button to Assign selected Location(s) to the selected Zone.



- Use this button to Remove selected Location(s) from the selected Zone.



- Use this button to Assign All Locations to the selected Zone.



- Use this button to Remove All Locations from the selected Zone.

Employee Zone Assignment

This form allows TeamWORKS System Administrators and Trade Foremen to assign Employees or Vendors to a Zone for their appropriate Trade(s).

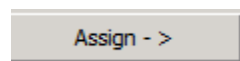
NOTE: Each Vendor seen must first be set up to view as an employee in TeamWORKS Vendor Manager. See Vendor Manager Documentation for details.

NOTE: Trade Level Security is enabled for this form. Trade Foremen can only view their Trade(s).

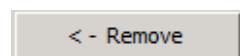
Assign To - Shows the current zone selected for the addition of employees within that zone.

Unassigned Locations List – Indicates all the Employees **NOT** currently assigned to a Zone.

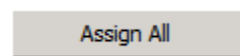
Current Zone Assignments – Indicates all the Employees that are currently assigned to the displayed Zone.



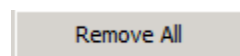
- Use this button to assign selected Employee(s) to the selected Zone.



- Use this button to remove selected Employee(s) from the selected Zone.

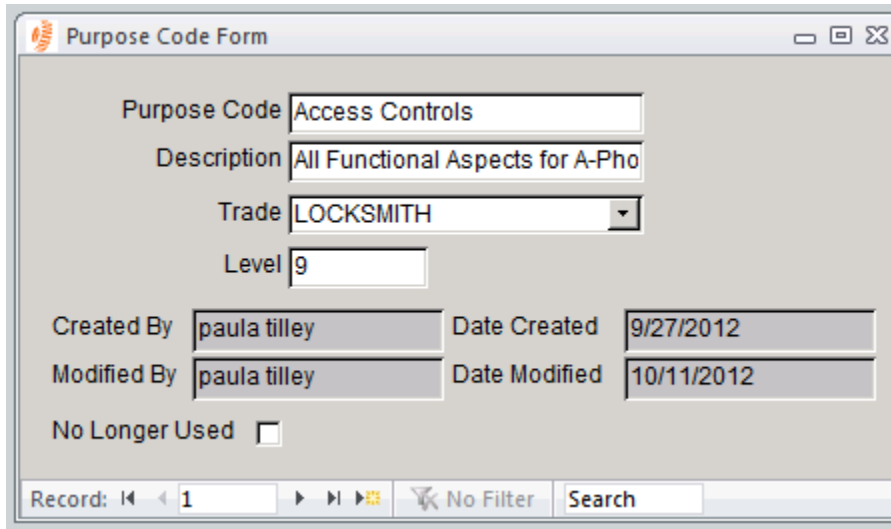


- Use this button to assign All Employee(s) to the selected Zone.



- Use this button to remove All Employee(s) from the selected Zone.

Purpose Codes and Levels



Purpose Code Form

Purpose Code: Access Controls

Description: All Functional Aspects for A-Pho

Trade: LOCKSMITH

Level: 9

Created By: paula tilley Date Created: 9/27/2012

Modified By: paula tilley Date Modified: 10/11/2012

No Longer Used

Record: 1 No Filter Search

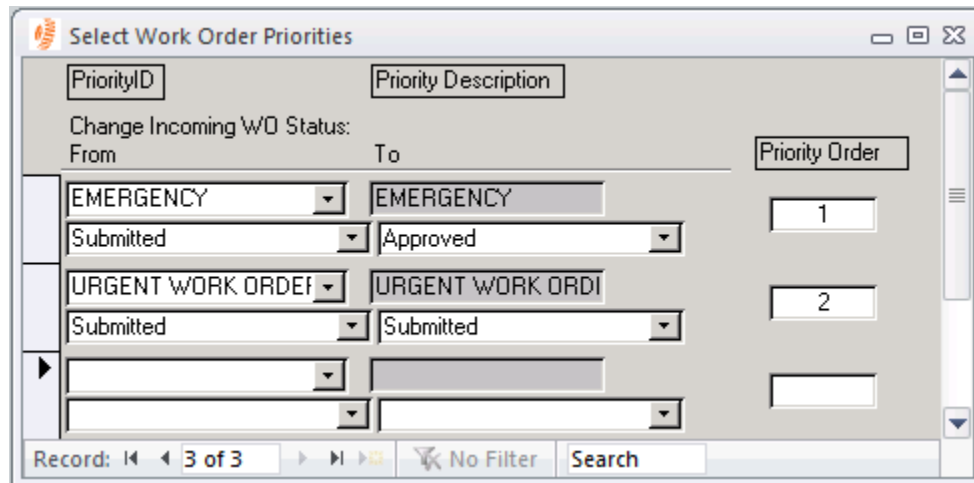
This form shows the purpose codes with an added Level field

This Level information corresponds to the Employee Pay Grade.

Example: Work orders assigned a purpose code with a level of 3 will only allow employees with a 3 or higher pay grade to do the work.

Priority Assignment

This form allows TeamWORKS System Administrators to determine the order of priorities for auto assignment purposes.



PriorityID	Priority Description	Priority Order
EMERGENCY	EMERGENCY	1
URGENT WORK ORDER	URGENT WORK ORDER	2

Priority ID - Indicates a priority for the requested work. (i.e. H – High, M – Medium, L – Low)

Priority Description - Indicates a priority for the requested work. (i.e. High, Medium, Low)

Priority Order – Indicates the order of importance for each priority.

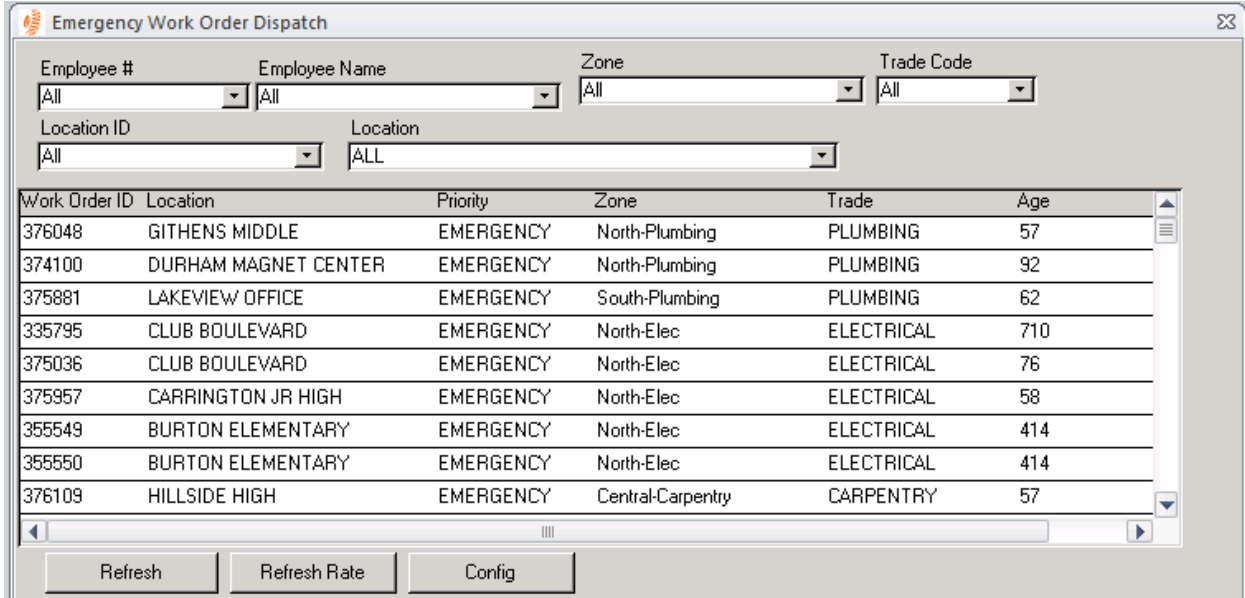
Change Incoming WO Status From – Indicates the original status of Work Orders to be auto assigned or assigned via Work Order Assignment.

Change Incoming WO Status To - The updated status when a Work Order is processed via auto assignment or Work Order Assignment.

Emergency Work Order Dispatch

This form allows TeamWORKS System Administrators and/ or Trade Foremen to view the list of ONLY unassigned work orders and change the order if needed. Filters can be applied allowing analysis of the work orders in queue.

NOTE: Trade Level Security is enabled for this form. Trade Foremen can only view their Trade(s).



Work Order ID	Location	Priority	Zone	Trade	Age
376048	GITHENS MIDDLE	EMERGENCY	North-Plumbing	PLUMBING	57
374100	DURHAM MAGNET CENTER	EMERGENCY	North-Plumbing	PLUMBING	92
375881	LAKEVIEW OFFICE	EMERGENCY	South-Plumbing	PLUMBING	62
335795	CLUB BOULEVARD	EMERGENCY	North-Elec	ELECTRICAL	710
375036	CLUB BOULEVARD	EMERGENCY	North-Elec	ELECTRICAL	76
375957	CARRINGTON JR HIGH	EMERGENCY	North-Elec	ELECTRICAL	58
355549	BURTON ELEMENTARY	EMERGENCY	North-Elec	ELECTRICAL	414
355550	BURTON ELEMENTARY	EMERGENCY	North-Elec	ELECTRICAL	414
376109	HILLSIDE HIGH	EMERGENCY	Central-Carpentry	CARPENTRY	57

Employee # -Select to display only the work orders assigned to that specific employee.

Employee Name- Indicates the Name of the tradesman assigned to do this work.

Zone – Select to display only the work orders assigned to the zone selected.

Trade Code – Indicates the trade required to complete the work order.

Location ID – Select to display only the work orders assigned to the location selected.

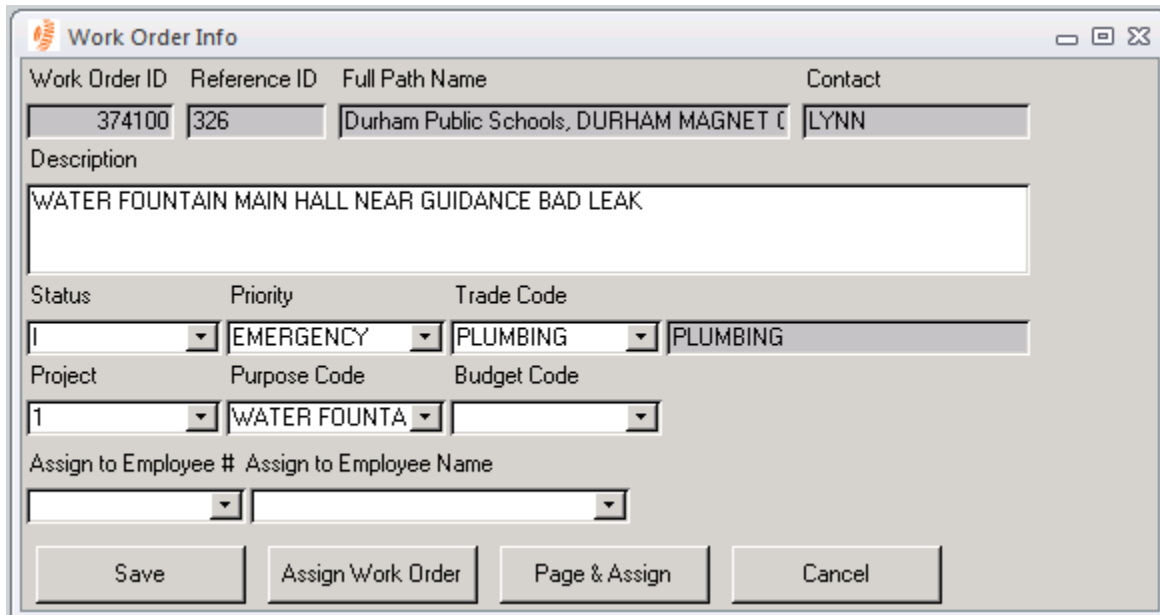
Location – The full name of the location needing the work to be done.

Refresh – Refreshes the database records displayed.

Refresh Rate – Sets the frequency the data is refreshed automatically.

Config – this button allows you to set default values and tab stops on the form

Double click on any record in the Emergency Work Order Dispatch screen to opens the following screen:



Work Order ID- This is a system generated field identifying this specific work order. **NOTE: This field cannot be changed.**

Reference ID – Indicates a location identifier.

Full Path Name- Indicates the full name of the location needing the work to be done.

Contact- Indicates the name of the *actual* person who initiated the request. If the tradesman has questions regarding this work request, this is the name he/she should look for.

Description- Shows a description of the problem/issue for this work request.

Status- Indicates the current status of the work order. This will change throughout the lifecycle of the current work order.

Priority- Indicates a priority for the requested work. (i.e. H – High, M – Medium, L – Low)

Trade Code- Indicates the trade required to complete the work order. If the work request will take multiple trades, it is suggested that you create a separate work order(s).

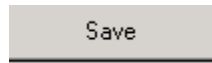
Project- This field is used for tracking specific types of projects. (i.e. Preventive Maintenance, Repaving parking lot, etc.)

Purpose Code- The reason the work is being done.

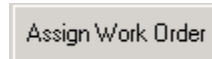
Budget Code- Indicates the budget this work order cost will be pulled from.

Assign to Employee #- Indicates the employee ID of the tradesman assigned to do this work.

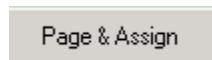
Assign to Employee Name- Indicates the Name of the tradesman assigned to do this work.



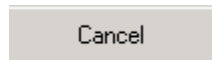
-Saves the current record.



- Saves the record and add “Assigned to (Assigned to Employee Name)” to the Description field of the work order and “Assigned to (Assigned to Employee #)” to the Action Taken field of the work order.



- Saves the record and add “Assigned to (Assigned to Employee Name)” to the Description field of the work order and “Assigned to (Assigned to Employee #)” to the Action Taken field of the work order and sends an email to Email Address identified in Employee Manager.

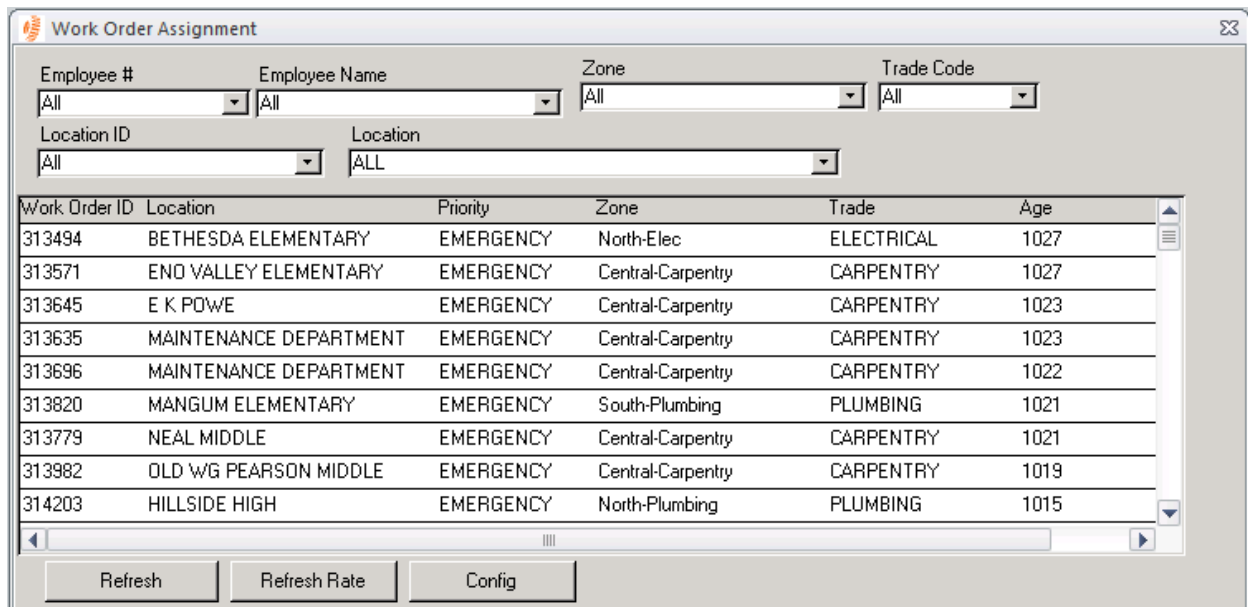


- Returns to “Emergency Work Order Dispatch” without saving changes.

Work Order Assignment

This form allows TeamWORKS System Administrators and/ or Trade Foremen to view ALL unassigned work orders and change the order if needed. Filters can be applied allowing analysis of the work orders in queue. Once the Zones are created and Locations and Employees are assigned, the system will auto-assign 10 work orders to each individual based on Priority, Location and Age of that work order.

NOTE: Trade Level Security is enabled for this form. Trade Foremen can only view their Trade(s) and Work Orders with transactions for their trades.



Work Order ID	Location	Priority	Zone	Trade	Age
313494	BETHESDA ELEMENTARY	EMERGENCY	North-Elec	ELECTRICAL	1027
313571	END VALLEY ELEMENTARY	EMERGENCY	Central-Carpentry	CARPENTRY	1027
313645	E K POWE	EMERGENCY	Central-Carpentry	CARPENTRY	1023
313635	MAINTENANCE DEPARTMENT	EMERGENCY	Central-Carpentry	CARPENTRY	1023
313696	MAINTENANCE DEPARTMENT	EMERGENCY	Central-Carpentry	CARPENTRY	1022
313820	MANGUM ELEMENTARY	EMERGENCY	South-Plumbing	PLUMBING	1021
313779	NEAL MIDDLE	EMERGENCY	Central-Carpentry	CARPENTRY	1021
313982	OLD W/G PEARSON MIDDLE	EMERGENCY	Central-Carpentry	CARPENTRY	1019
314203	HILLSIDE HIGH	EMERGENCY	North-Plumbing	PLUMBING	1015

Employee # – Select to display only the work orders assigned to that specific employee.

Employee Name – Select to display only the work orders assigned to that specific employee.

Zone – Select to display only the work orders assigned to the zone selected.

Trade Code – Select to display only the work orders assigned to the trade code selected.

Location ID – Select to display only the work orders assigned to the location selected.

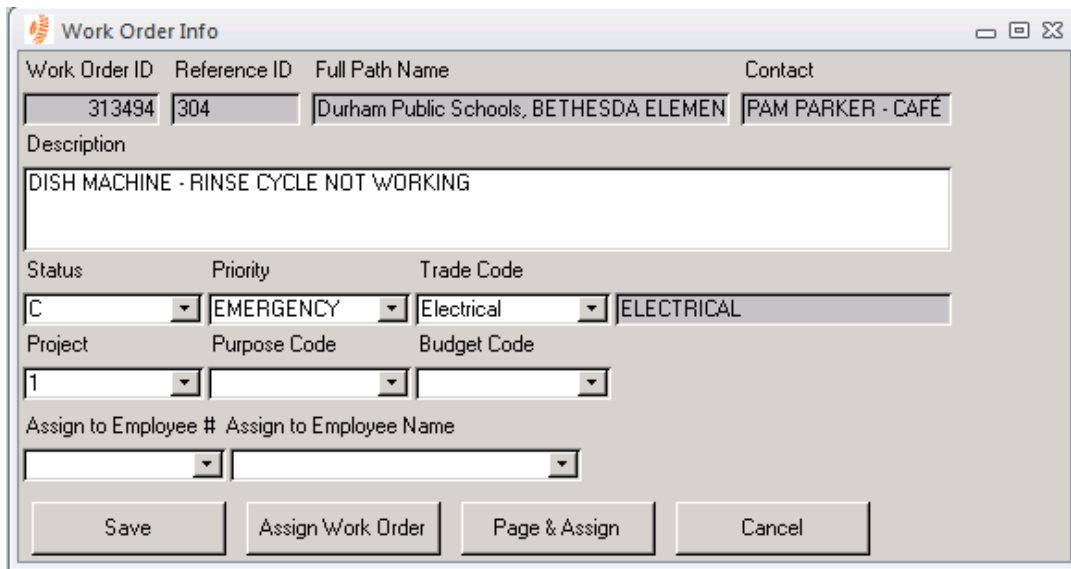
Location – Select to display only the work orders assigned to the location selected.

Refresh – Refreshes the database and refreshes the records displayed.

Refresh Rate – Used to set the frequency the data is refreshed automatically.

Config – this button allows you to set default values and tab stops on the form

Double click on any record in the Work Order Assignment screen to open the following:



The screenshot shows a 'Work Order Info' dialog box with the following fields and values:

Work Order ID	Reference ID	Full Path Name	Contact
313494	304	Durham Public Schools, BETHESDA ELEMEN	PAM PARKER - CAFÉ

Description: DISH MACHINE - RINSE CYCLE NOT WORKING

Status	Priority	Trade Code
C	EMERGENCY	Electrical

Project	Purpose Code	Budget Code
1		

Assign to Employee # and Assign to Employee Name fields are empty.

Buttons: Save, Assign Work Order, Page & Assign, Cancel

Work Order ID- This is a system generated field identifying this specific work order. **NOTE: This field cannot be changed.**

Reference ID – Indicates a location identifier.

Full Path Name- Indicates the full name of the location needing the work to be done.

Contact- Indicates the name of the *actual* person or entity who initiated the request. If the tradesman has questions regarding this work request, this is the name he/she should look for.

Description- Shows a description of the problem/issue for this work request.

Status- Indicates the current status of the work order. This will change throughout the lifecycle of the current work order.

Priority- Indicates a priority for the requested work. (i.e. H – High, M – Medium, L – Low)

Trade Code- Indicates the trade required to complete the work order. If the work request will take multiple trades, it is suggested that you create a separate work order(s).

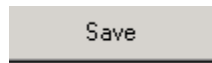
Project- This field is used for tracking specific types of projects. (i.e. Preventive Maintenance, Repaving parking lot, etc.)

Purpose Code- *The reason the work is being done.*

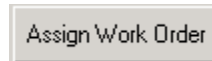
Budget Code- Indicates the budget this work order cost will be pulled from.

Assign to Employee #- Indicates the employee ID of the tradesman assigned to do this work.

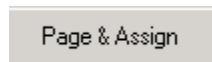
Assign to Employee Name- Indicates the Name of the tradesman assigned to do this work.



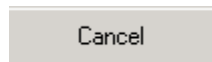
-Saves the current record.



- Saves the record and add "Assigned to (Assigned to Employee Name)" to the Description field of the work order and "Assigned to (Assigned to Employee #)" to the Action Taken field of the work order.

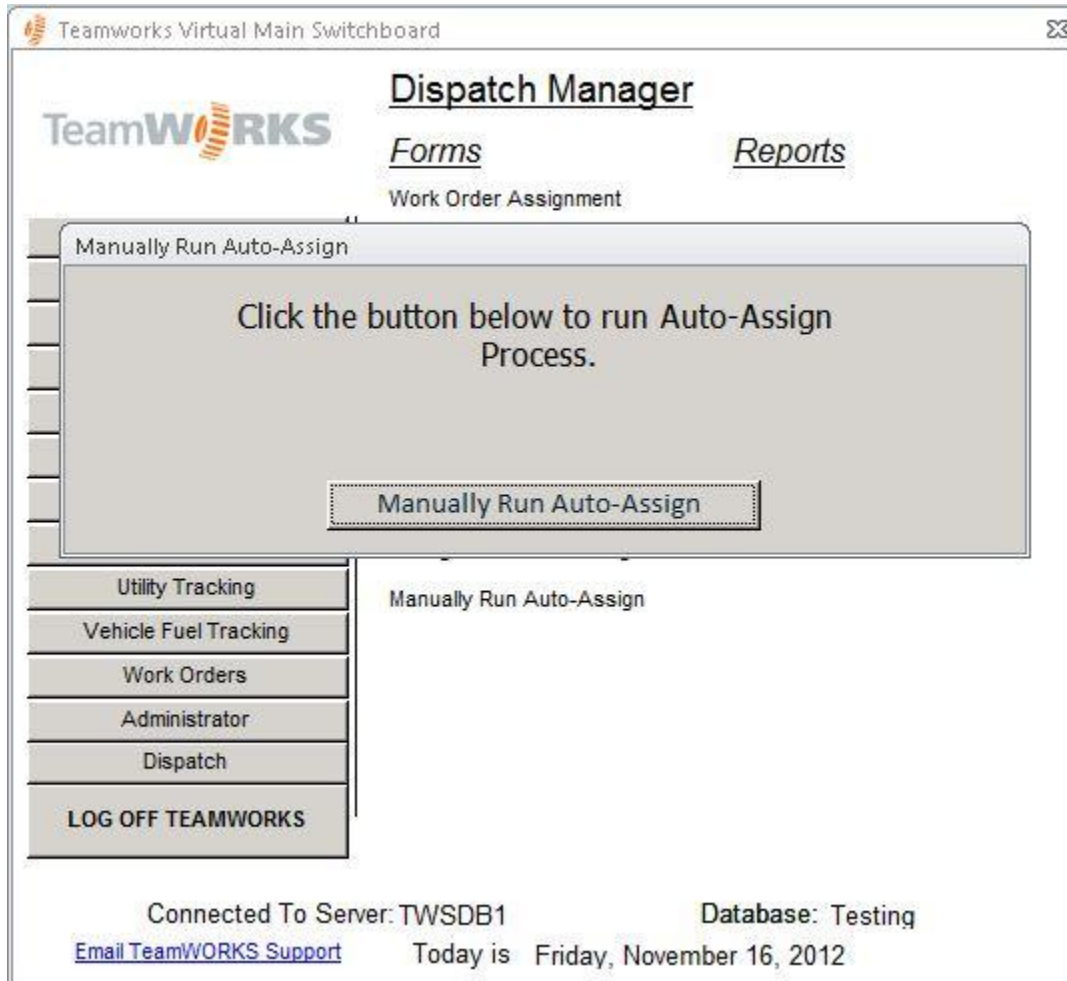


- Saves the record and add "Assigned to (Assigned to Employee Name)" to the Description field of the work order and "Assigned to (Assigned to Employee #)" to the Action Taken field of the work order and sends an email to Email Address identified in Employee Manager.



- Returns to "Work Order Assignment" without saving changes.

Manually Run Auto-Assign



The screenshot shows the TeamWORKS Virtual Main Switchboard interface. At the top, it says "Teamworks Virtual Main Switchboard" and "TeamWORKS Dispatch Manager". Below the logo, there are links for "Forms" and "Reports". Under "Forms", there is a link for "Work Order Assignment". A modal window titled "Manually Run Auto-Assign" is open, displaying the text "Click the button below to run Auto-Assign Process." and a button labeled "Manually Run Auto-Assign". To the left of the modal is a sidebar menu with options: "Utility Tracking", "Vehicle Fuel Tracking", "Work Orders", "Administrator", "Dispatch", and "LOG OFF TEAMWORKS". At the bottom of the interface, it shows "Connected To Server: TWSDB1", "Database: Testing", and "Today is Friday, November 16, 2012". There is also a link for "Email TeamWORKS Support".

Click the button to run the Run Auto-Assign process manually.

Customer Support

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