



5.0 User Guide

C/S Employee & Vendors Manager



www.goTeamWORKS.com

Email: support@goTeamWORKS.com

Toll Free Phone: 866-892-0034

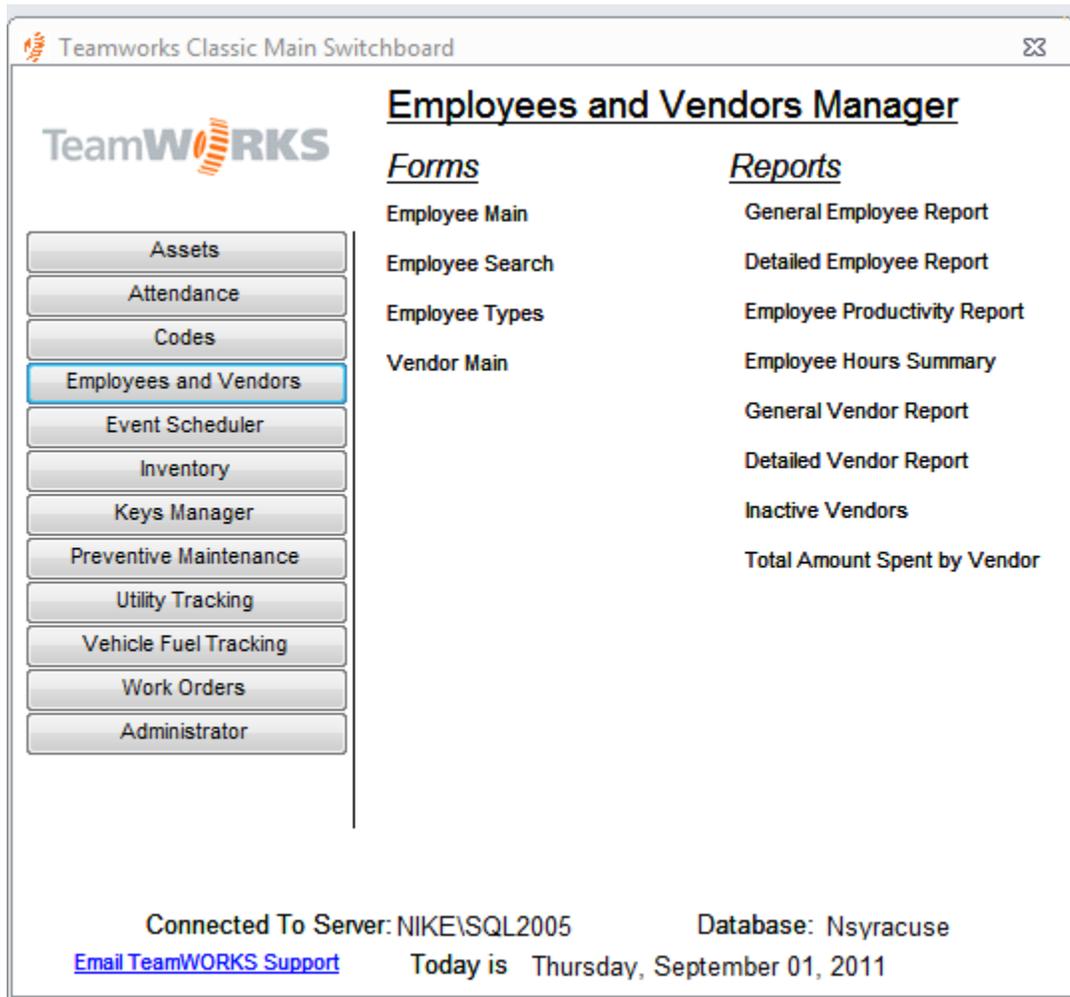
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Employee and Vendors

Employees and Vendors Main Switchboard



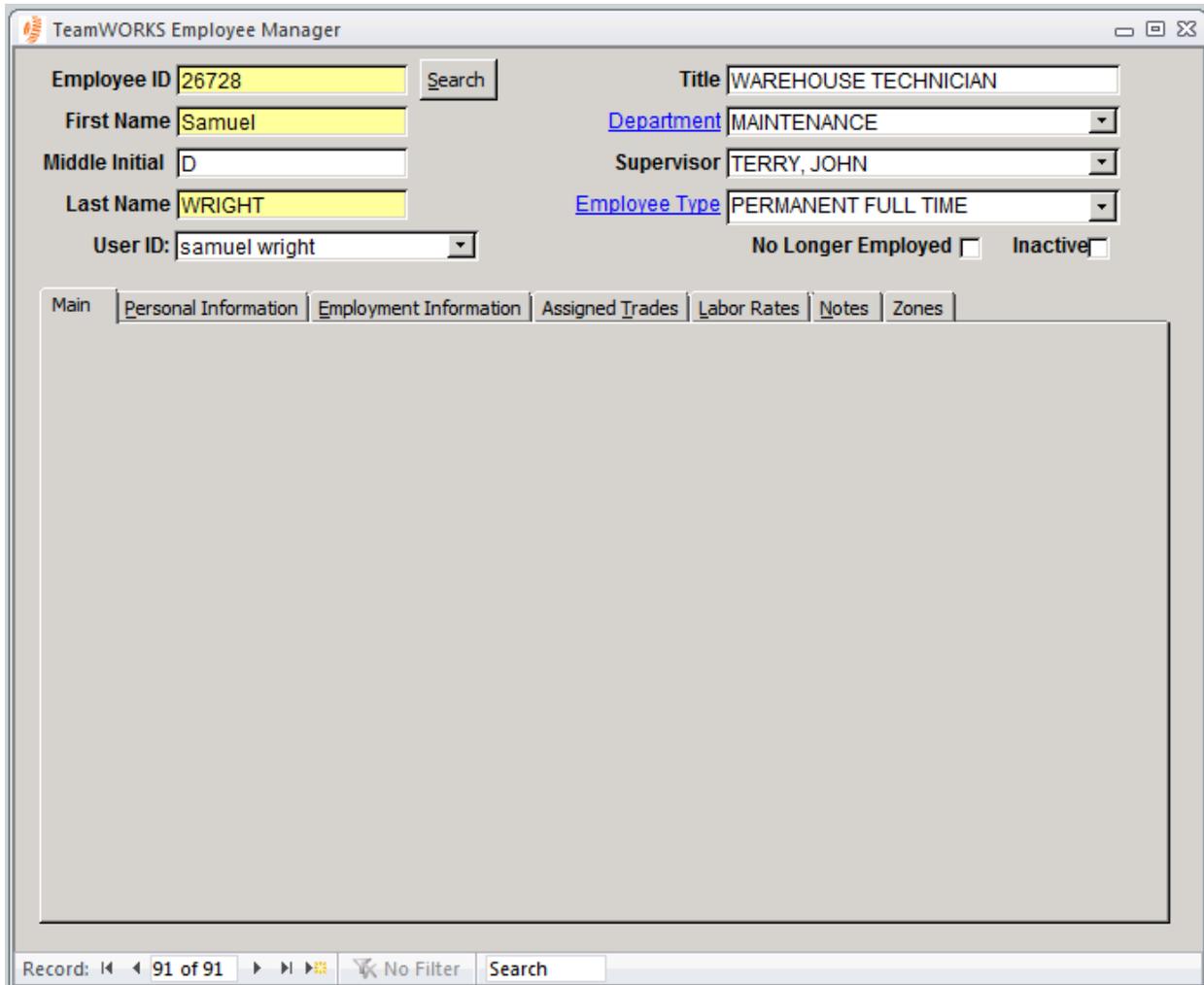
The screenshot displays the 'Teamworks Classic Main Switchboard' window. On the left is a vertical menu with buttons for Assets, Attendance, Codes, Employees and Vendors (highlighted), Event Scheduler, Inventory, Keys Manager, Preventive Maintenance, Utility Tracking, Vehicle Fuel Tracking, Work Orders, and Administrator. The main area is titled 'Employees and Vendors Manager' and is divided into two columns: 'Forms' and 'Reports'. The 'Forms' column includes Employee Main, Employee Search, Employee Types, and Vendor Main. The 'Reports' column includes General Employee Report, Detailed Employee Report, Employee Productivity Report, Employee Hours Summary, General Vendor Report, Detailed Vendor Report, Inactive Vendors, and Total Amount Spent by Vendor. At the bottom, it shows connection details: 'Connected To Server: NIKE\SQL2005 Database: Nsyracuse', a support link 'Email TeamWORKS Support', and the date 'Today is Thursday, September 01, 2011'.

Forms

Employee Main

The Employee Manager allows you to keep and maintain information for each employee. Employees must be entered in this form in order to be able to assign them work orders, track their attendance, etc.

Employee Manager Main Tab



TeamWORKS Employee Manager

Employee ID: 26728 Search

Title: WAREHOUSE TECHNICIAN

First Name: Samuel Department: MAINTENANCE

Middle Initial: D Supervisor: TERRY, JOHN

Last Name: WRIGHT Employee Type: PERMANENT FULL TIME

User ID: samuel wright No Longer Employed Inactive

Main | Personal Information | Employment Information | Assigned Trades | Labor Rates | Notes | Zones

Record: 91 of 91 No Filter Search

Employee ID – Enter a unique ID for the Employee you are entering.

**Note – be cautious about using an employee’s FULL social security number as their assigned Employee ID, as it prints on several reports within the system. Also, reusing or reissuing Employee IDs can cause*

inaccurate data in reporting. It is recommended that NEW and unique Employee IDs be issues to new employees.

Search Button – click here to search for an existing employee. You will see the following form: You can search by Employee ID or Employee Last Name.

First Name – enter the first name of the employee.

Middle Name – enter the middle name of the employee.

Last Name – enter the last name of the employee.

UserID – select the TeamWORKS UserID associated with this employee.

Title – enter the title of the employee.

Department – enter the department the employee will be working in.

Supervisor – enter or select the employee’s Supervisor. The supervisor must be entered prior to electing him/her from this list.

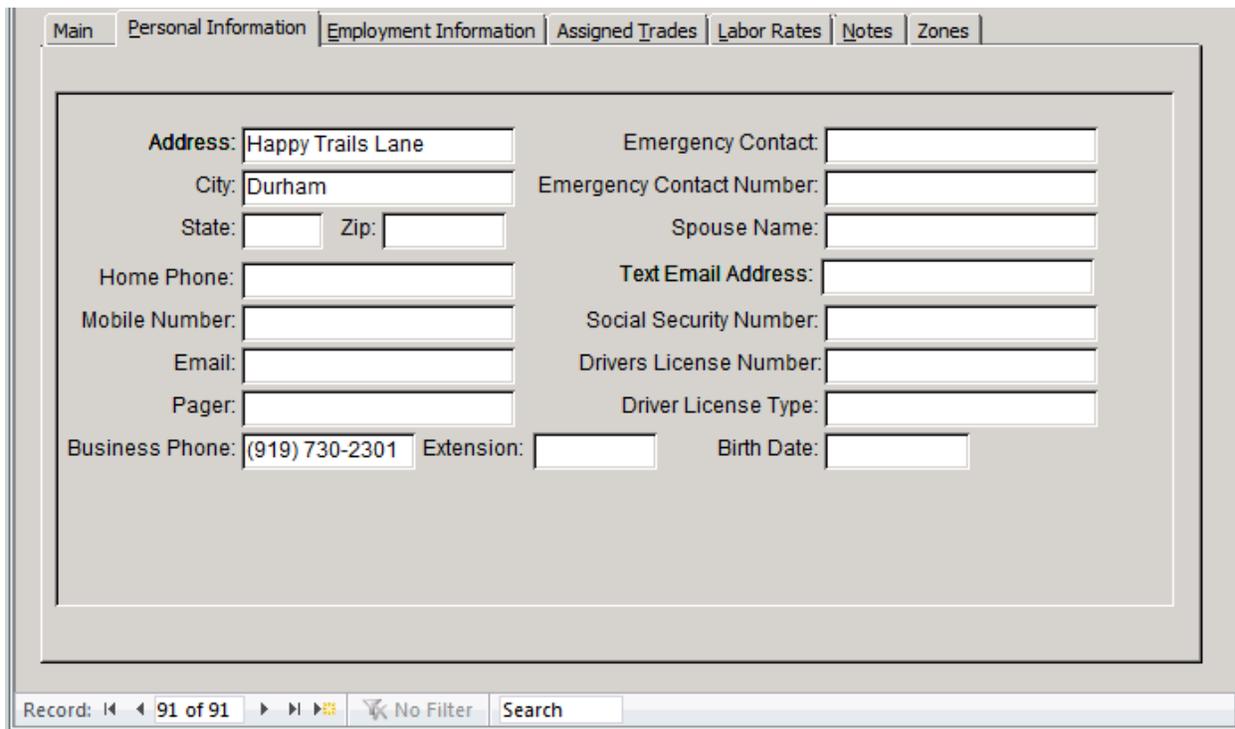
Employee Type – enter or select the employee type for this employee (e.g. Full time, part time, Summer help, etc.)

No Longer Employed – check here if this employee no longer works for the district. Doing this will allow you to maintain his/her work history.

Inactive – check here if this employee is still employed for this district, but may be out for medical reasons or other reasons.

Note – instead of deleting an employee if they no longer work at the district, mark them as No Longer Employed, then they won’t show up on reports, nor can you assign them work orders. By doing this, you keep their work history. Do not reuse Employee ID’s, as this will result in inaccurate historical data.

Personal Information



Address – enter the address of the employee.

City – enter the city where the employee lives.

State – enter the state where the employee lives.

Zip – enter the zip code of the employee.

Home Phone – enter the home phone number of the employee.

Mobile Number – enter the mobile phone number of the employee.

Email – enter the email address of the employee.

Pager – enter the pager number of the employee.

Business Phone – enter the office phone number of the employee.

Extension – enter the business phone extension of the employee.

Emergency Contact – enter the emergency contact for the employee.

Emergency Contact Number – enter the phone number of the emergency contact person.

Spouse Name – enter the employee’s spouse name.

Text Email Address – enter the employee’s text email address.

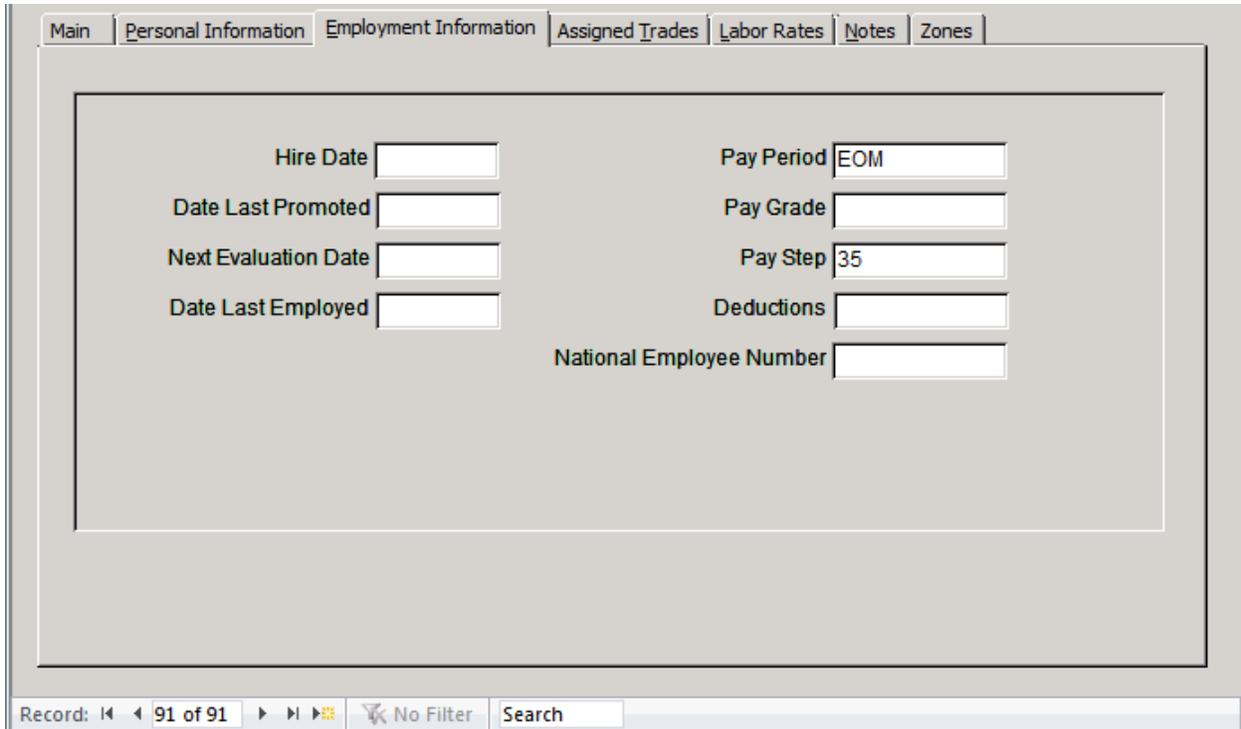
Social Security Number – enter the SSN of the employee.

Driver’s License Number – enter the DL Number of the employee.

Driver License Type – enter the DL Type of the employee (e.g. Class C).

Birth Date – enter the birth date of the employee.

Employment Information



Hire Date – enter the date of hire for this employee.

Date Last Promoted – enter the date this employee was last promoted.

Next Evaluation Date – enter the date the employee is scheduled for their next evaluation.

Date Last Employed – enter the date of the employee’s last work day.

Pay Period – enter the pay period this employee usually gets paid.

Pay Grade – enter the pay grade for this employee.

Pay Step – enter the pay step for this employee.

Deductions – enter any deduction amount for this employee.

National Employee Number – enter the employee’s national number, Green Card, etc.

Assigned Trades

Trade	Primary Trade	Can Manage in this Trade?
ADMINISTRATIVE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 1 | No Filter | Search

Record: 91 of 91 | No Filter | Search

Trade – enter or select the Trade Code(s) assigned to this employee.

Primary Trade – click this box for the appropriate trade for the employee. When you select this employee for labor transactions, the system places his/her Primary Trade as the Default trade. Only trades in the employees Assigned Trades tab can be selected when entering labor transactions for work orders.

Can Manage in this Trade? – check each box that corresponds with the appropriate trade indicating the employee can make ‘management’ decisions.

Labor Rates

Main Personal Information Employment Information Assigned Trades Labor Rates Notes Zones					
Hourly Rate			Account		
Labor Type	Paid	Charged	Paid From	Charged To	
▶ R	\$18.83	\$18.83	1	2	
*			2	1	

Record: 1 of 1 | No Filter | Search

Record: 91 of 91 | No Filter | Search

Labor Type – enter or select the labor type for this employee. Examples of labor types are Overtime, Regular time, windshield time, etc.

Paid – enter the actual hourly rate this employee is paid for this labor type.

Charged – enter the hourly rate charged for this labor type.

Paid From – system will deduct from this account the total cost for this transaction.

Charged To – system will add to this account the total cost for this transaction.

Notes

Notes

Driver's License Expires 01/01/2015

Record: 91 of 91

Enter any generic notes regarding this employee.

Zones

Zones

Zone Primary Zone Secondary Zone

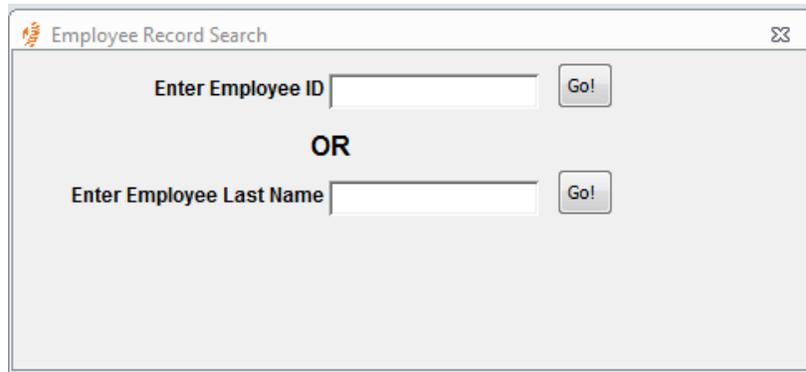
Record: 1 of 1

Zone – Populated by the Dispatch application. This identifies an area within your enterprise for which this employee is assigned.

Primary Zone – Check for employee's primary zone.

Secondary Zone – Check for employee's secondary zone.

Employee Search Form

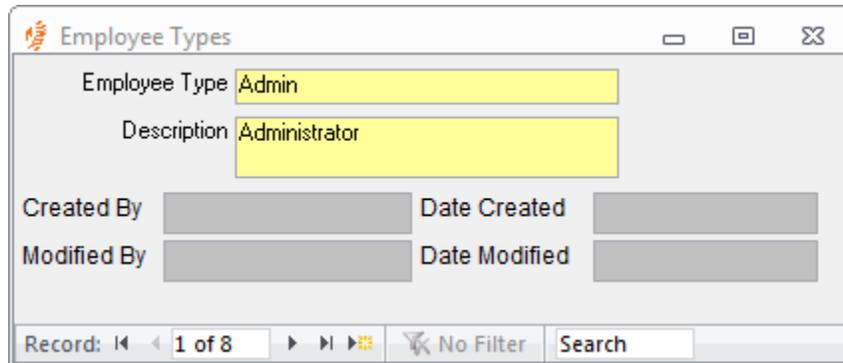


The screenshot shows a web browser window titled "Employee Record Search". Inside the window, there are two search options. The first option is "Enter Employee ID" followed by a text input field and a "Go!" button. Below this, the word "OR" is centered. The second option is "Enter Employee Last Name" followed by a text input field and a "Go!" button.

This form is used to go to a select employee record by entering either their Employee ID or Last Name. If a search finds multiple records with same last name, they will all show in the filtered set. Hit Go!

Employee Type

This form allows you to create or specify different types of employee categories such as 'Regular', 'Summer Help', 'Substitute', etc.



Employee Type – enter a code to identify the employee category.

Description – enter a description for the employee type.

Created By – indicates employee who created this record.

Date Created – indicated date this record was created.

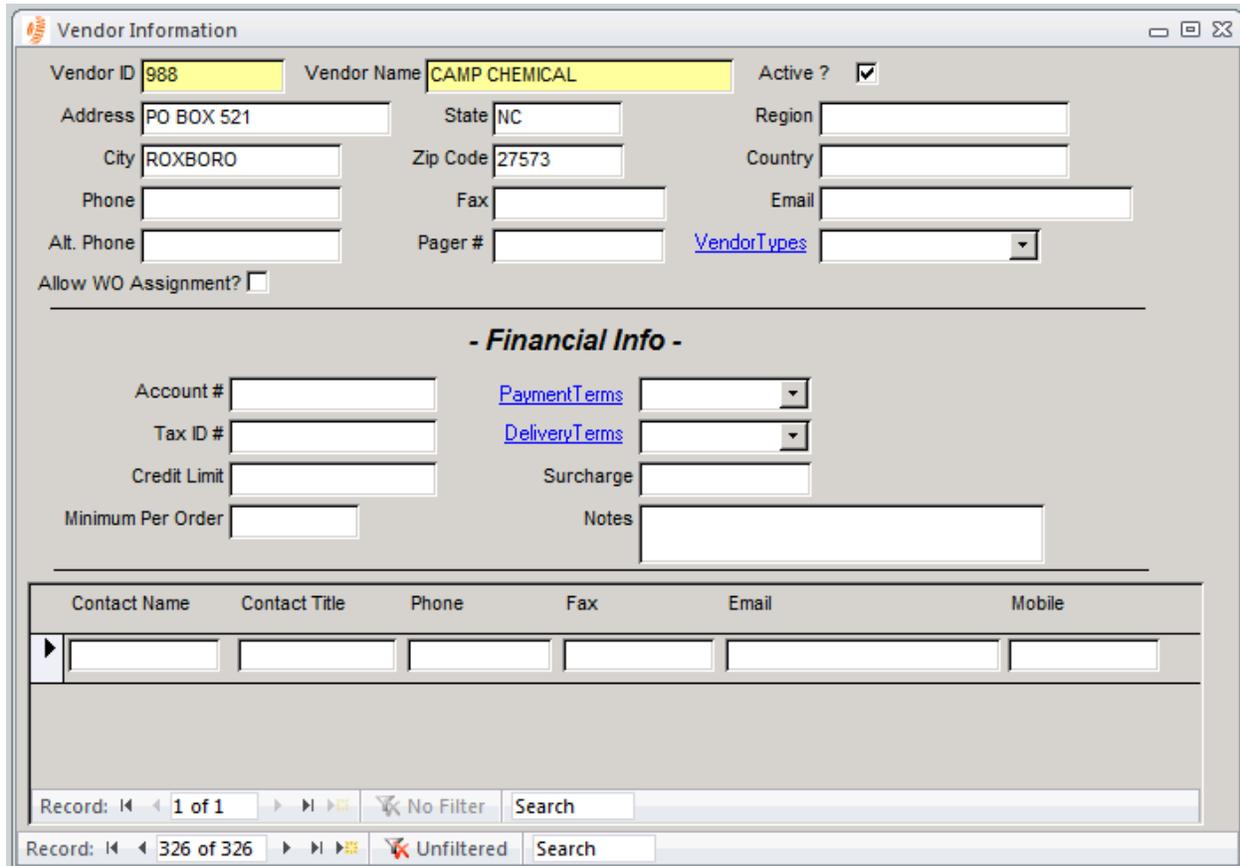
Modified By – indicates employee who modified this record last.

Date Modified – indicated date this record was last modified.

Vendor Main

The Vendor Manager allows you to keep and maintain information for each vendor. Vendors must be entered in this form in order to be able to assign them work orders, track payment, etc.

Vendor Information



Vendor ID: 988 Vendor Name: CAMP CHEMICAL Active?

Address: PO BOX 521 State: NC Region:

City: ROXBORO Zip Code: 27573 Country:

Phone: Fax: Email:

Alt. Phone: Pager #: Vendor Types:

Allow WO Assignment?

- Financial Info -

Account #: Payment Terms:

Tax ID #: Delivery Terms:

Credit Limit: Surcharge:

Minimum Per Order: Notes:

Contact Name	Contact Title	Phone	Fax	Email	Mobile
<input type="text"/>					

Record: 1 of 1 No Filter Search

Record: 326 of 326 Unfiltered Search

Vendor ID – enter a Vendor ID of this supplier. It must be unique to the other Vendor ID’s.

Vendor Name – enter the name of the Vendor.

Active? – check this box if this is an active vendor. Uncheck if you currently are not doing business with them.

Address – enter the address for this vendor.

City – enter the city for this vendor.

Phone – enter the main phone number for this vendor.

Alt. Phone – enter an alternate phone number for this vendor.

State - enter the state for this vendor.

Zip Code – enter the zip code for this vendor.

Fax – enter the fax number for this vendor.

Pager # - enter the pager number for this vendor main contact.

Region – enter the region for this vendor (e.g. Southwest Region).

Country – enter the Country for this vendor.

Email – enter the email for this vendor main contact.

Vendor Type – enter or select the vendor type. The vendor type allows you to categorize your vendors by the type of supplies you purchase from them.

Allow WO Assignment? – If this box is checked then the vendor can be assigned Work Orders.

Financial Info

Account # - if you have an account with this vendor, enter it here.

Tax ID # - enter the vendor's tax ID number.

Credit Limit – if you have a credit limit with this vendor, enter it here.

Minimum Per Order – if you typically have a minimum order amount from this vendor, enter it here.

Payment Terms – enter or select the payment terms you have agreed to with this vendor. To enter a new Payment Term, click on the Payment Terms link.

Delivery Terms – enter or select the delivery terms you have agreed to with this vendor. To enter a new Payment Term, click on the Delivery Terms link.

Surcharge – enter any surcharge amounts you might incur by using this vendor.

Notes – enter any notes regarding this vendor.

Contact Info

Contact Name – enter the name of a contact for this vendor. If you have multiple contacts, add them all.

Contact Title – enter the title of the contact person.

Phone – enter the main phone number of the contact person.

Fax – enter the fax number of the contact person.

Email – enter the email address of the contact person.

Mobile - enter the mobile number of the contact person.

Reports

General Employee Report

General Employee Report									
TeamWORKS Solutions, Inc Facility Management Software									
Name	Emp.								
Employee ID	Type	Title	Address	City	State	Zip	Dept.	Hm.	Phone
& Decorating Center, Gainesville Paint									
005465	Gainesvill						Gainesville		
& Pressure Wahing, A-1 Hood Cleaning									
004354	A-1 Hood	A-1 Hood Cleaning & Pressure Washing					A-1 Hood C	(678) 617-9168	
Acoustics, Jimco									
002664	Jimco Ac						Jimco Acou		

Detailed Employee Report

Detailed Employee Report [Close]

Employee List C Show No Longer Employed

4271	Anguish, Charlene
47	Antuna, MaryAnn
4718	App, Monica
59	Artuso, Joe
4496	Austin, Francis (Bob)
4405	Aylesworth, Kathy

Cancel
Preview

Detailed Employee Report

TeamWORKS Solutions, Inc
Facility Management Software

Employee ID	26111	Title	Electrical PM Crew
Last Name	Tradesman	Supervisor	15071
Middle Name		Department	Maint
First Name	Tommy	Driver License Number	
SSN		Driver License Type	
Address		National Employee Number	
City		Birthdate	
State	GA	Spouse Name	
Postal Code	30028	Emergency Contact Person	
Region		Emergency Contact Number	
Country		Employee Type	Full Time
Home Phone		Date Hired	10/15/2007
Business Phone	Ext	Date Last Promoted	
Car Phone		Next Evaluation Date	
Pager		Date Last Employed	
Fax Number		Pay Period	
EMail Address		Deductions	
Text EMail		Pay Grade	
Notes		Pay Step	

Employee Labor Rates

Labor Type	Paid Hourly Rate	Charged Hourly Rate
Overtime	\$43.49	\$43.49
Regular	\$28.99	\$28.99

Employee Trades

Description	Primary Trade?	Can Manage?
Electrical	Yes	No

Friday, September 16, 2011
Page 1 of 1

Employee Hours Summary

This report will summarize the total number of work order labor hours logged by an individual or multiple people. *NOTE: This report is only accessible if you have rights as a TeamWORKS Administrator.*

Employee Hours Report		TeamWORKS Solutions, Inc Facility Management Software	
Employee Name	Employee ID	Hours	Total Labor
Carney, Tommy	26111	3,203.01	\$93,460.63
Grand Total		3,203.01	\$93,460.63

General Vendor Report

General Vendor Report

Vendor Type **C**

Contracted Service	Carpentry, Electrical, and Plumbing Services
CS Garbage	Disposable Waste
GS	Gas company
Power Company	Power Company
Vendor	Vendor

Cancel **Preview**

Make a selection from the vendor type to show all vendors for the specified type of product they provide. Make no selections to show all vendors.

Vendor Report							TeamWORKS Solutions, Inc Facility Management Software	
Vendor Name	Vendor ID	Address	City	State	Zip	Phone	Fax	
A & J Auto Parts (NAPA)	002282	306 Canton Hwy	Cumming	GA	30040	(770) 887-3111		
A & S Lock and Safe, Inc	004241	440 A Canton Rd	Cumming	GA	30040	(770) 888-7399	(770) 888-7694	
A-1 Hood Cleaning and Pressure Washing	004354	PO Box 912	Oakwood	GA	30566	(678) 617-9168		
A-1 Phillips Painting	005397	43 Canton Hwy	Cumming	GA	30040	(770) 889-3013	(678) 513-1618	
AAA Commercial Floors, Inc.	003534	PO Box 1413	Gainesville	GA	30503			
Absolute Contractors, Inc.	005312	117 McEver Lane	Hoschton	GA	30548	(770) 616-8603	(678) 414-5785	
ACG Construction Services	005305							

Detailed Vendor Report

Vendor Detailed Report

Vendor List C Sort By Vendor ID

002282	A & J Auto Parts (NAPA)
004241	A & S Lock and Safe, Inc
004354	A-1 Hood Cleaning and Pressure Washing
005397	A-1 Phillips Painting
003534	AAA Commercial Floors, Inc.
005312	Absolute Contractors, Inc.
005305	ACG Construction Services
000250	Acousti Inc.

Include Inactive Vendors

Cancel Preview

Select from the vendor list to specify vendors or leave unselected to show all vendors. By default, only Active vendors will show in list. To include inactive vendors in the list, check the Include Inactive Vendors check box.

Detailed Vendor Report		TeamWORKS Solutions, Inc Facility Management Software
Name: A & J Auto Parts (NAPA)	Address: 306 Canton Hwy	Phone: (770) 887-3111
Vendor ID: 002282	City: Cumming	Fax:
Vendor Type: Vendor	State: GA	Email:
Active Supplier ?: Yes	Zip Code: 30040	Minimum Per Order:
Federal ID #:	Surcharge:	
Account #:	Delivery Terms:	
Credit Limit: \$0.00	Payment Terms:	
Notes:		

Inactive Vendors Report

This will show the exact report as the General Vendor Report, but only show Inactive Vendors.

Inactive Vendors							
Vendor Name	Vendor ID	Address	City	State	Zip	Phone	Fax
American Poly	1						
Cornelia Brooms	3						
Davls	4						
Don Swan	5						
G & G Sanitation	G and G	P. O. Box 439	Cumming	GA	30028	(770) 887-6063	(770) 887-9837
Gem Chem	7						
Genesis	6						
Georgia Fire Protection	004136	3019 North Decatur Rd.	Decatur	GA	30033	(404) 294-4476	(404) 294-0563

Total Amount Spent By Vendor

NOTE: This report will show only purchases for warehouse inventory and not purchases for work order transactions.

Vendor - Select a vendor or use Ctrl+Click to select multiple vendors for this report.

Date Range – enter a date range to show how much has been spent by a specific vendor during the specified date range.

Total Amount Spent by Supplier					DBCC Facilities Services
SUPPLIER ID	SUPPLIER NAME	CONTRACT NUMBER	PAYMENT TERMS	CREDIT LIMIT	TOTAL AMOUNT SPENT
ABC123	ABC Company				\$1,395.0000
Grand Total					\$1,395.0000

Customer Support

Email: Support@goTeamWORKS.com

Telephone: Toll Free (866) 892-0034