5.0 Admin Guide

WEB Control Panel

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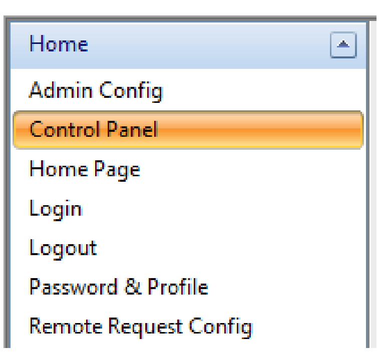
Web Control Panel

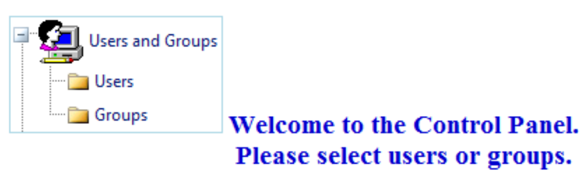
Control Panel is used to:

1. Create users for the TeamWORKS applications
2. Set permissions for users for each module
3. Edit existing usernames, passwords and authorized locations
4. Set up connections to the database
5. Set up Field Level Security for Web Applications
6. Delete or Disable existing user accounts

Login to TeamWORKS WEB

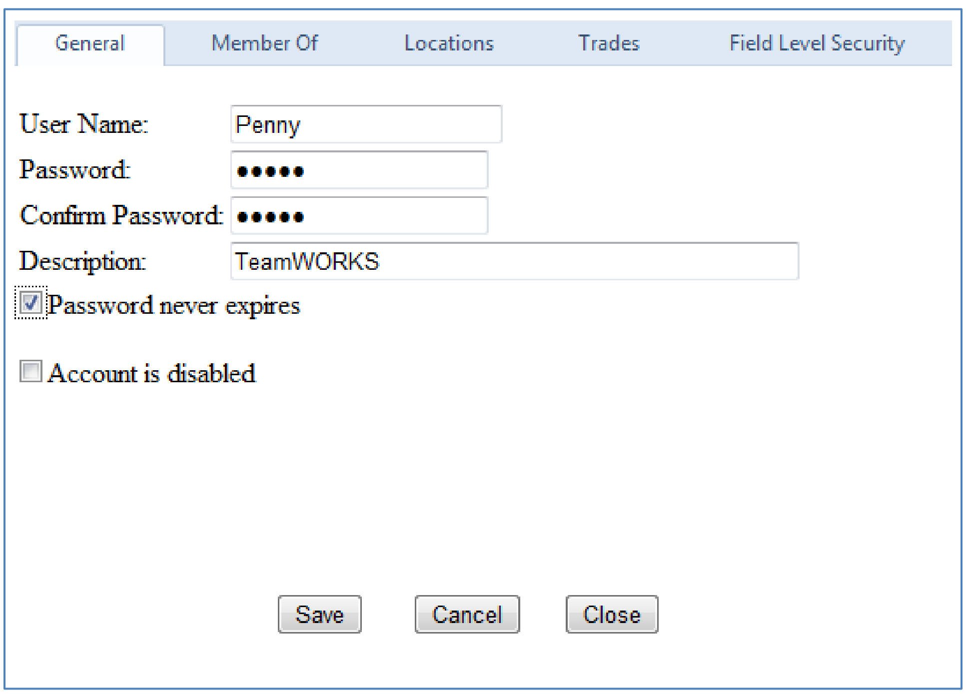
After logging in, the user can access the Control Panel under the Home Menu.





Creating a New User - General Settings

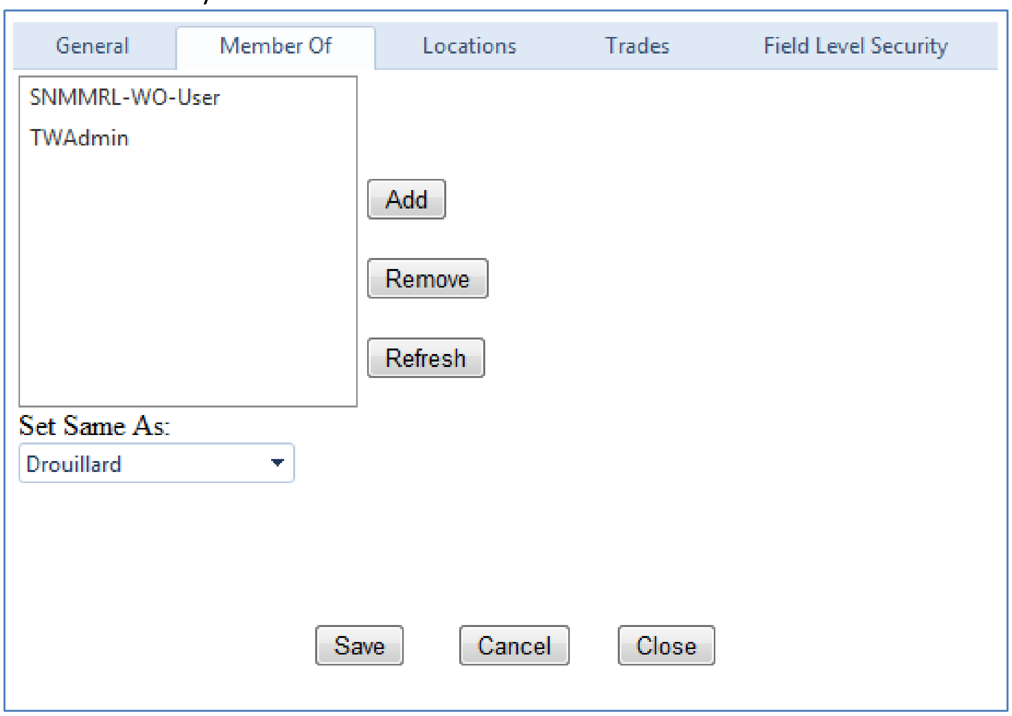
Right click on the Users folder and Select New. Create a ***unique*** username which will NOT be case sensitive when logging in. Enter a password which can be alphanumeric and IS case sensitive when logging in. Re-enter to confirm. An optional description can be entered for this user such as: Middle School Principal or HS Custodian. Check the "Password never expires" check box. To disable an account, simply check the Account is disable checkbox. This can be used if a user is out for an extended period of time and you do not want anyone to login with their credentials. Click Save to Save the General Settings.



Member Of

Here you will determine which right and to what modules the user will have.

SystemAdmin (Not SNSystemAdmin) – this account is the 'highest' level a user can have. With this account, a user has 'full rights' to every application in the TeamWORKS Client, including Administrative functions. With this right, the user will not need any other security levels for the client modules. This is the only security level that allows access to the TeamWORKS Control Panel.
SNMMRLWO- User – this account allows remote users to submit and view requests for work orders.
TWAdmin – this account has the same 'full rights' a SystemAdmin has, but DOES NOT have Administrative functionality in the TeamWORKS Client.



How levels of security work

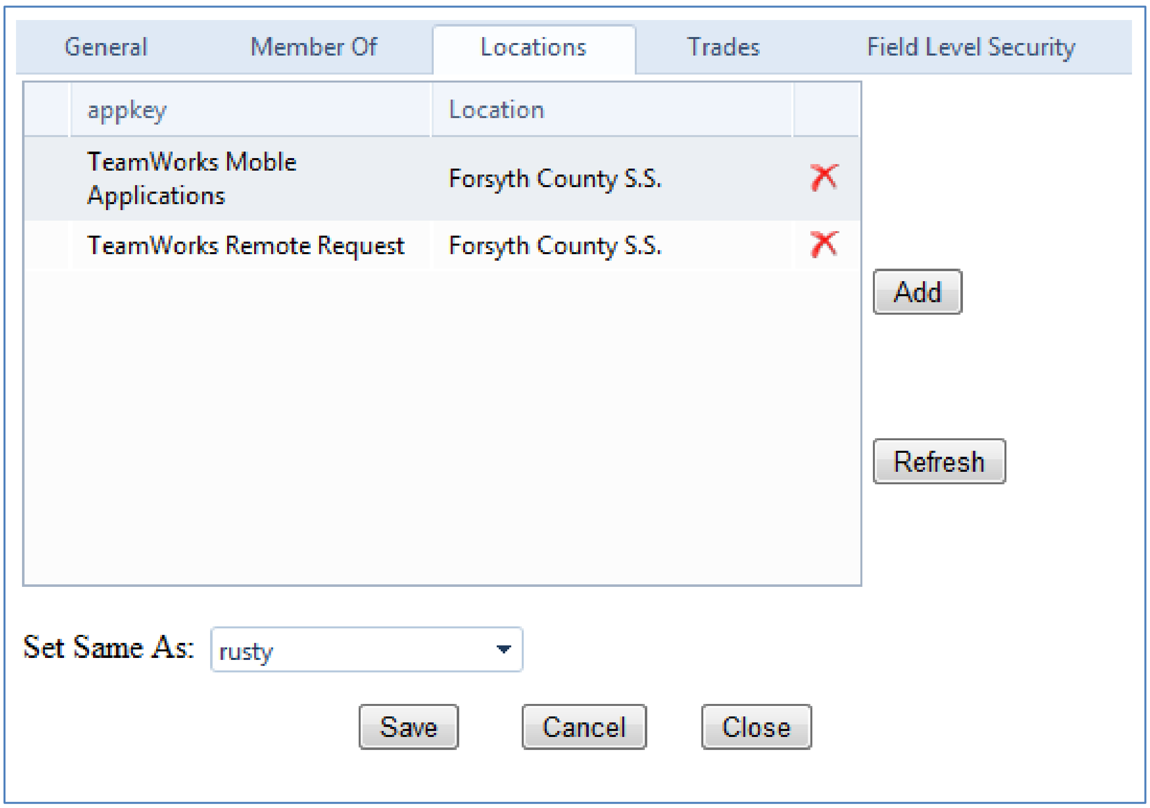
All Other Modules – the other modules will have an Add, Delete, Edit and View capability

- **View** – this security level allows for read-only capability for the given module. (I.e. WorkOrdersView – this security level would allow a user to ONLY view work orders through the TeamWORKS Client)
- **Add** – this level gives the user ability to Add new records as well as have the view capability. You cannot Edit or Delete records
- **Edit** – this level gives the user ability to Edit existing records, Add new records and view records. You cannot delete records.
- **Delete** – this level gives the user ability to Delete, Edit, Add and View Records

Locations

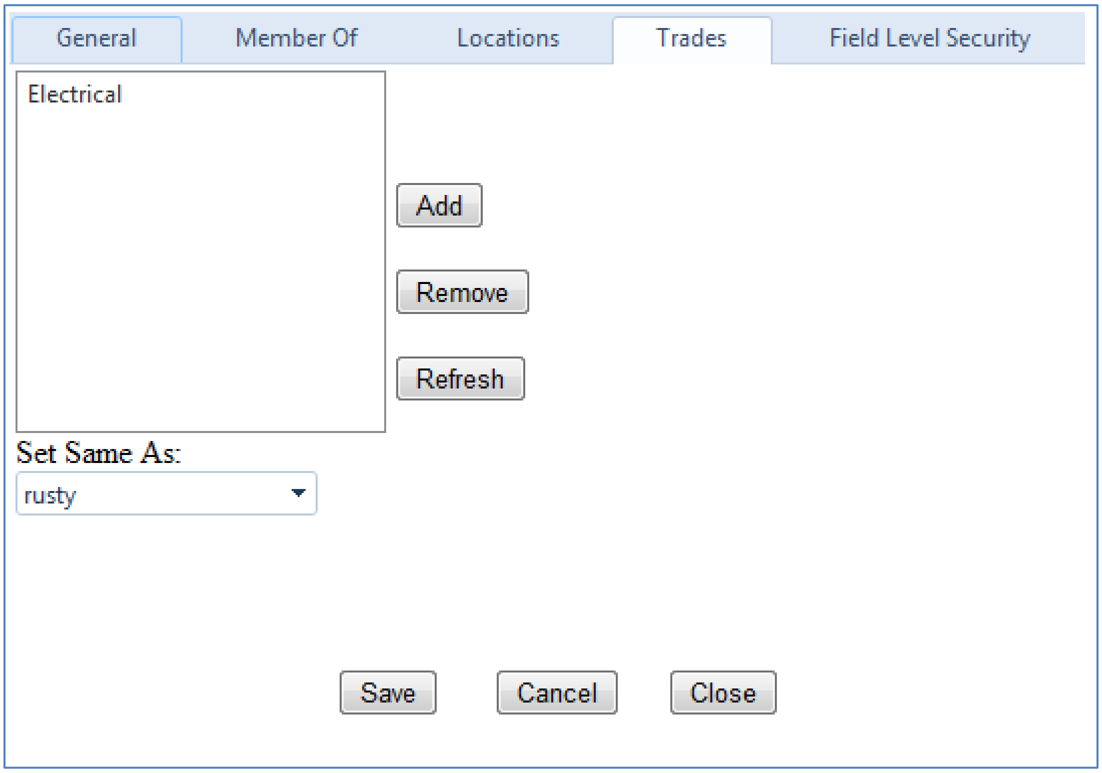
The locations tab allows user to determine which location(s) any given user will have rights to submit and view requests from. Click the Add button select a location. Child paths for the selected location will also be included. A user can have multiple locations. If a user will be allowed to submit for any location, simply click the highest level in the path structure, typically the District.

To delete a location, click  icon for the location. If you want this user to have the same locations as an existing user, you can use the Set Same As drop down box to set that. Click Save when done.



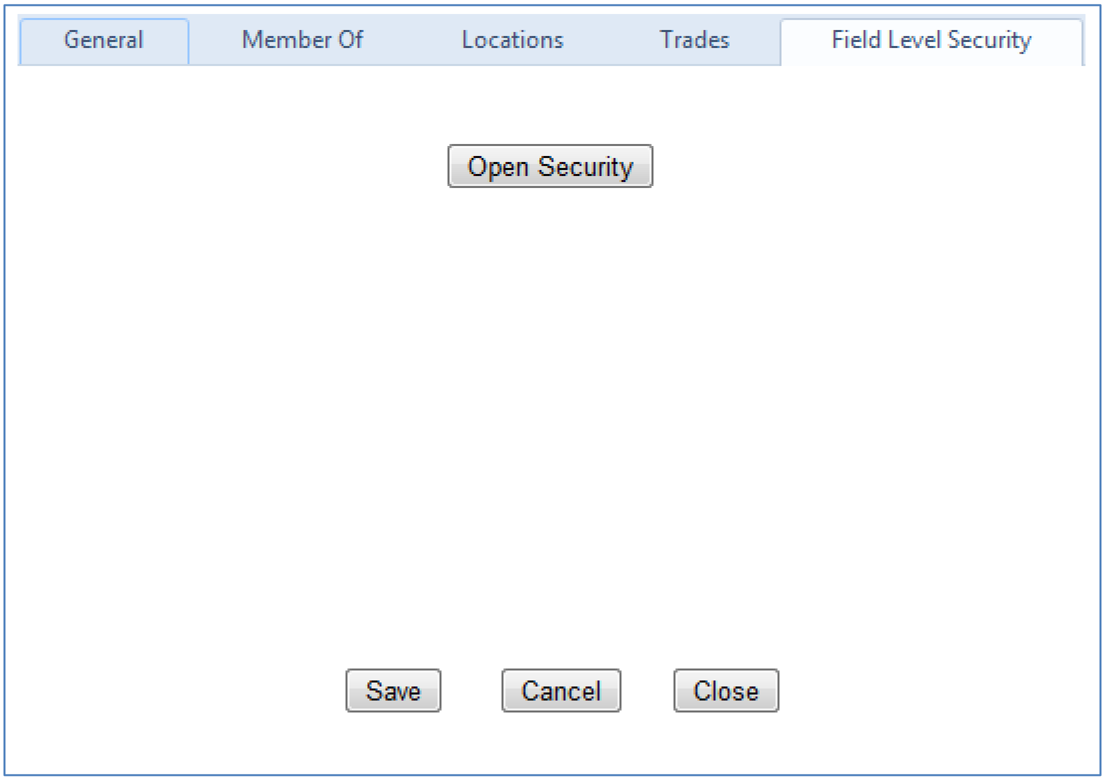
Trades

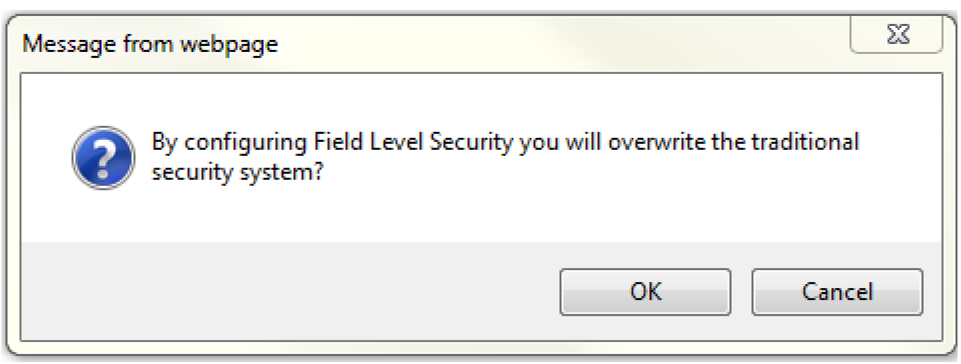
The Trades tab allows user to see work orders for specific trades in WEB Work Orders.



Field Level Security

Field level security is a global setting that allows administrators to set rights at the field level for the WEB Work Orders Module. This has NO effect on the client application. This is a great tool if you want to limit or minimize what users can see on the Web Work Orders as well as Transactions.

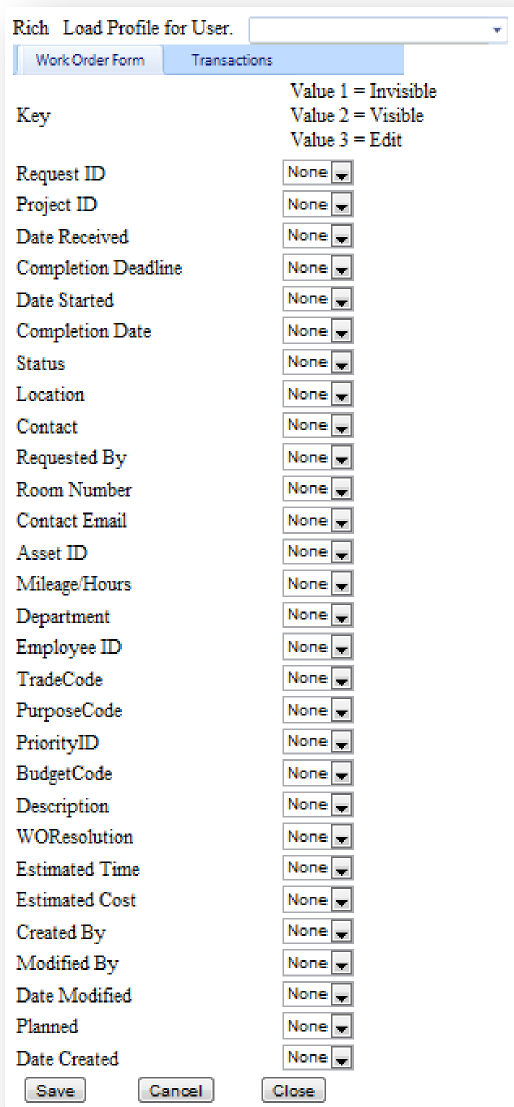




Click OK to continue.

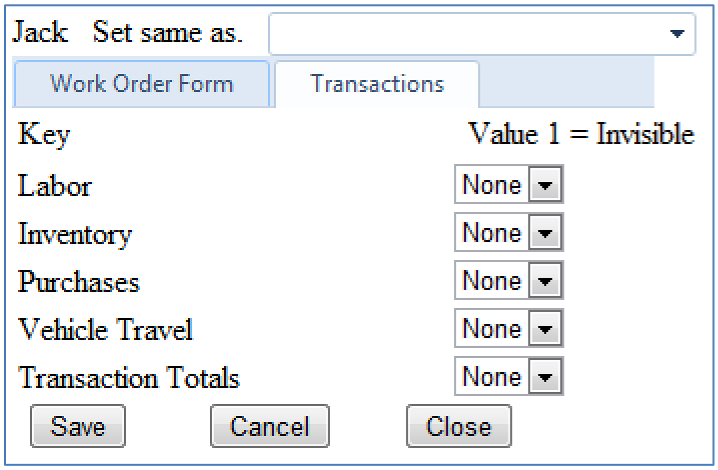
Setting values for the Web Work Order Form

Each field will allow you to set a value for each individual user for WEB Work Orders. Value 1 for a field will make the field invisible on the form. Value 2 will make it visible but not allow changing values for that field (read-only) and Value 3 will allow the editing of that specific field. If multiple users will have the same rights on the Web WO form, it is easiest to set up 1 and use as a template for the rest. You can do this by selecting the 'template' user from the Load Profile for User drop-down list. Click Save to save the values.

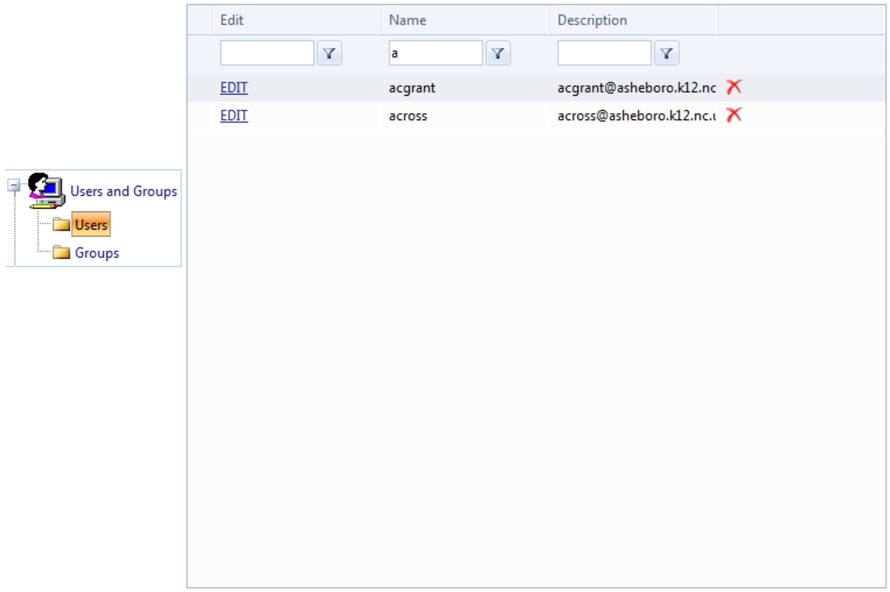


Setting values for the Transactions

Click on the Transactions Tab to set values for the Transactions form for Web Work Orders. There, you can set values for each type of transaction. Click Save to save the values.

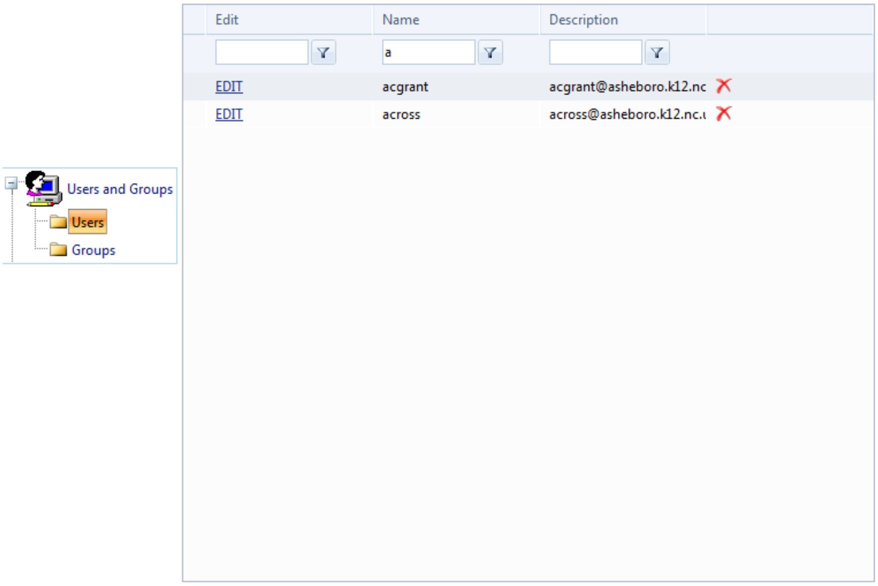


Editing an Existing User

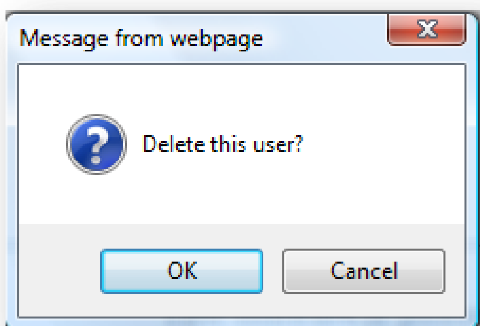


To edit a user, click the Users folder and click the Edit that corresponds with the username you'd like to make changes to.

Deleting an Existing User



To delete a user, click the Users folder and click the icon that corresponds with the username you'd like to delete. You will be prompted to confirm your deletion request.



Customer Support

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