



5.0 Admin Guide

WEB Control Panel



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Web Control Panel

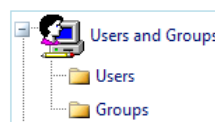
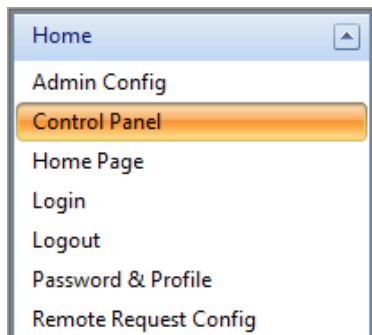
Control Panel is used to:

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

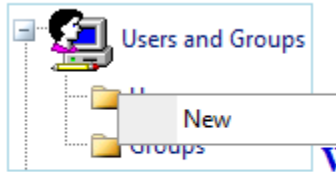


After logging in, the user can access the Control Panel under the Home Menu.



**Welcome to the Control Panel.
Please select users or groups.**

Creating a New User - General Settings



**Welcome to the Control Panel.
Please select users or groups.**

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.

General	Member Of	Locations	Trades	Field Level Security
<p>User Name: <input type="text" value="Penny"/></p> <p>Password: <input type="password" value="•••••"/></p> <p>Confirm Password: <input type="password" value="•••••"/></p> <p>Description: <input type="text" value="TeamWORKS"/></p> <p><input checked="" type="checkbox"/> Password never expires</p> <p><input type="checkbox"/> Account is disabled</p> <p style="text-align: center;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Close"/> </p>				

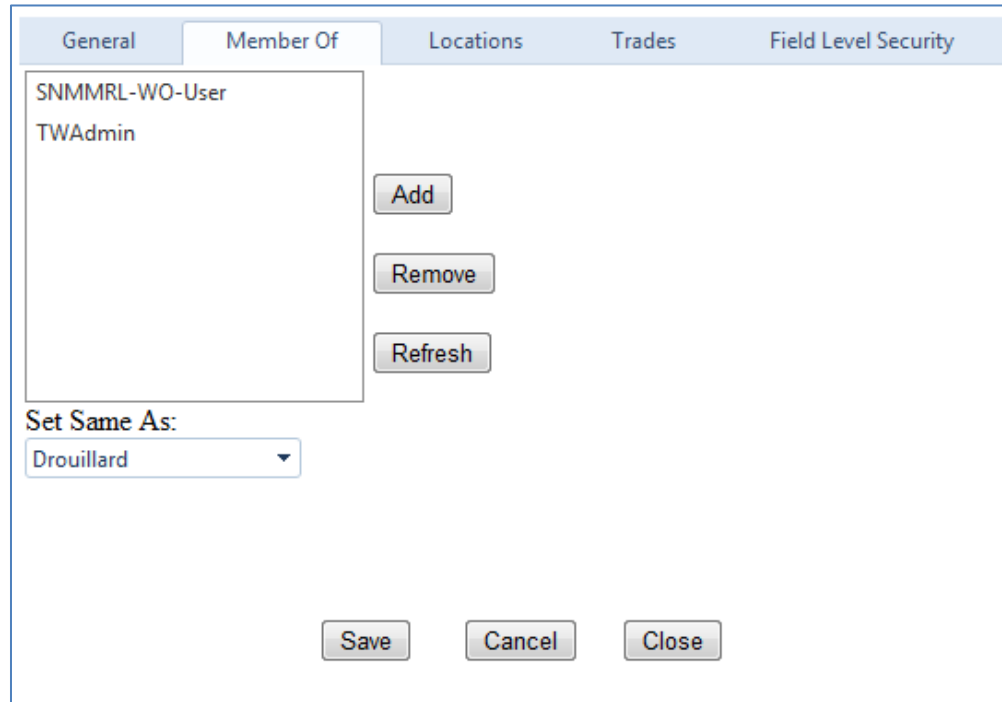
Member Of

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.



The screenshot shows a dialog box with the following elements:

- Tabbed interface with 'Member Of' selected.
- List of users: SNMMRL-WO-User, TWAdmin.
- Buttons: Add, Remove, Refresh.
- 'Set Same As:' dropdown menu with 'Drouillard' selected.
- Buttons: Save, Cancel, Close.


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.

appkey	Location	
TeamWorks Mobile Applications	Forsyth County S.S.	
TeamWorks Remote Request	Forsyth County S.S.	

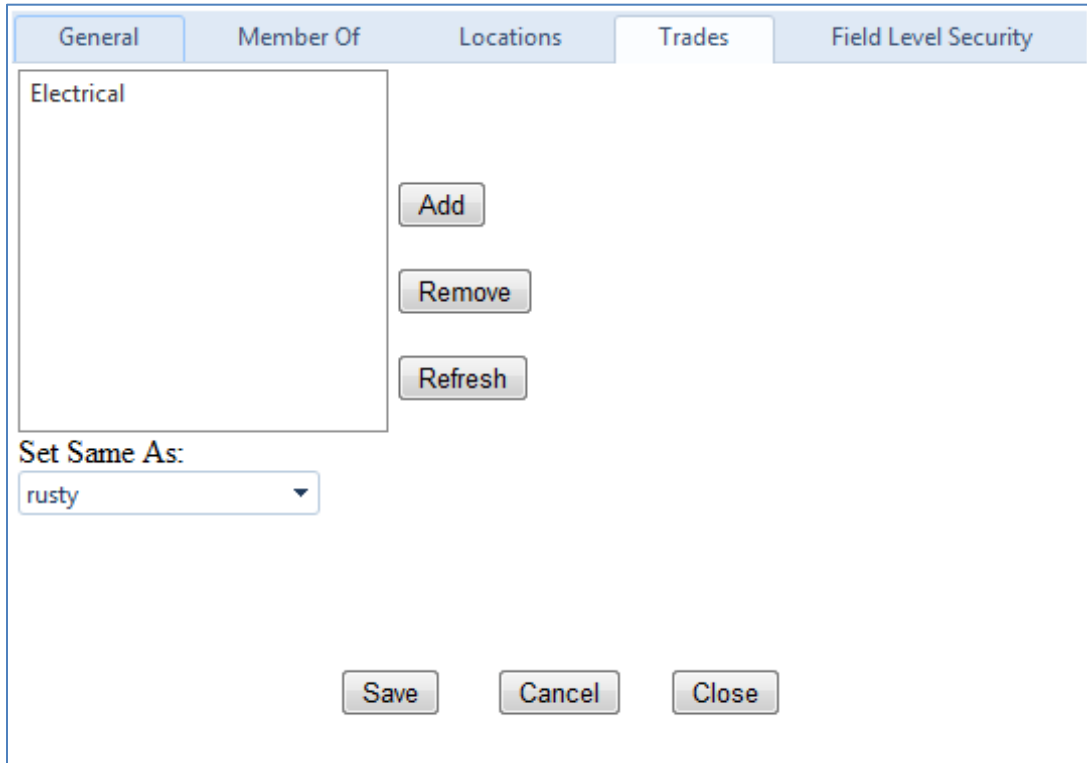
Buttons: Add, Refresh

Set Same As:

Buttons: Save, Cancel, Close

Trades

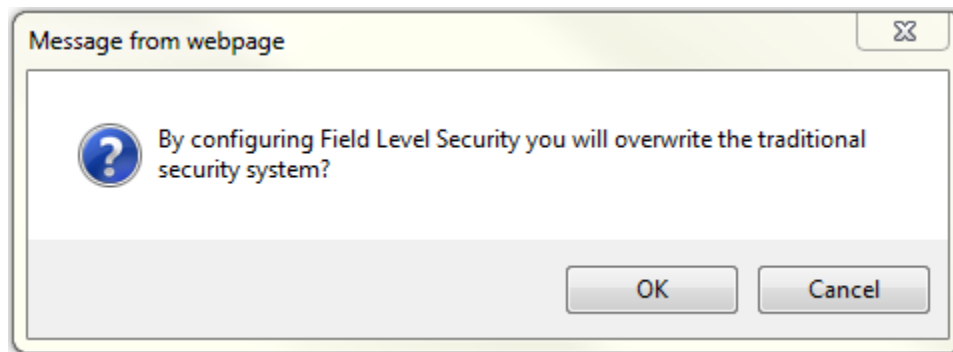
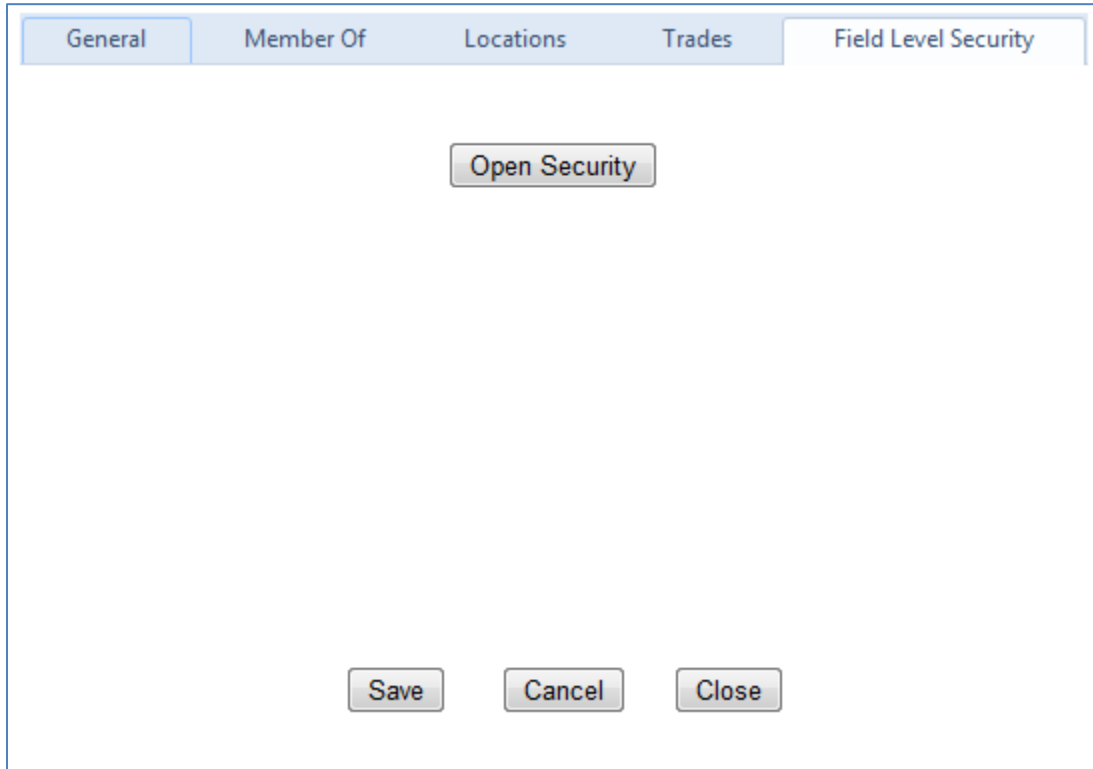
The Trades tab allows user to see work orders for specific trades in WEB Work Orders.



The screenshot shows a web interface with a tabbed menu at the top containing "General", "Member Of", "Locations", "Trades", and "Field Level Security". The "Trades" tab is selected. Below the tabs is a large empty rectangular box labeled "Electrical". To the right of this box are three buttons: "Add", "Remove", and "Refresh". Below the "Electrical" box is a label "Set Same As:" followed by a dropdown menu showing "rusty". At the bottom of the interface are three buttons: "Save", "Cancel", and "Close".

Field Level Security

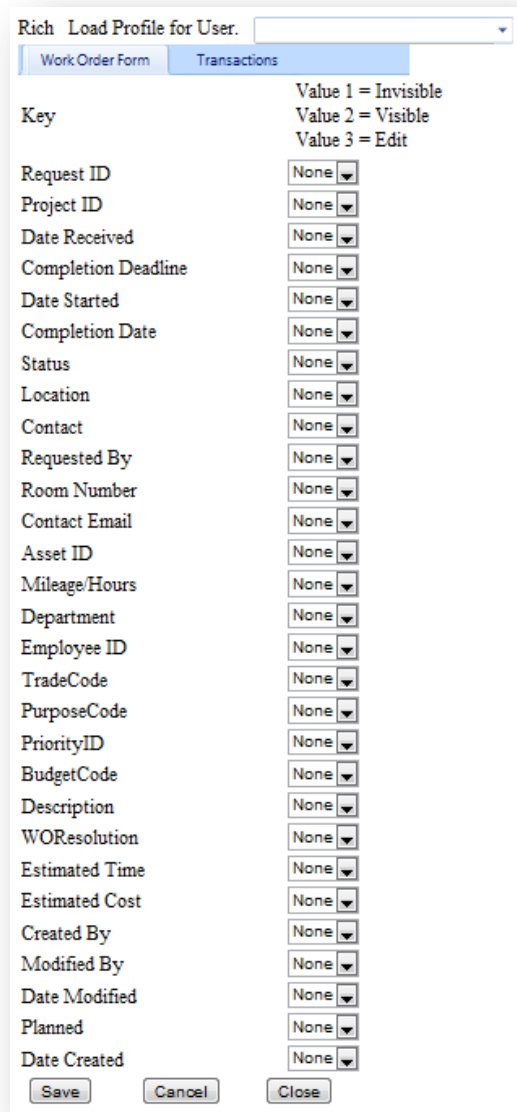
Field level security is a global setting that allows administrators to set rights at the field level for the WEB Work Orders Module. This has NO effect on the client application. This is a great tool if you want to limit or minimize what users can see on the Web Work Orders as well as Transactions.



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.



Rich Load Profile for User. [dropdown]

Work Order Form Transactions

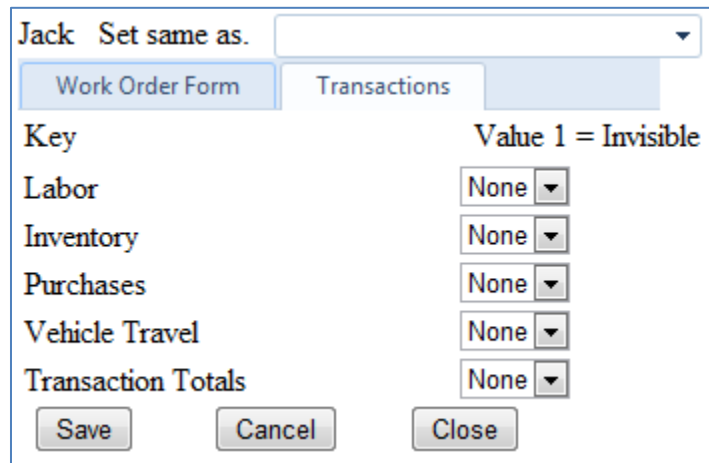
Key Value 1 = Invisible
Value 2 = Visible
Value 3 = Edit

Request ID	None
Project ID	None
Date Received	None
Completion Deadline	None
Date Started	None
Completion Date	None
Status	None
Location	None
Contact	None
Requested By	None
Room Number	None
Contact Email	None
Asset ID	None
Mileage/Hours	None
Department	None
Employee ID	None
TradeCode	None
PurposeCode	None
PriorityID	None
BudgetCode	None
Description	None
WOResolution	None
Estimated Time	None
Estimated Cost	None
Created By	None
Modified By	None
Date Modified	None
Planned	None
Date Created	None

Save Cancel Close

Setting values for the Transactions

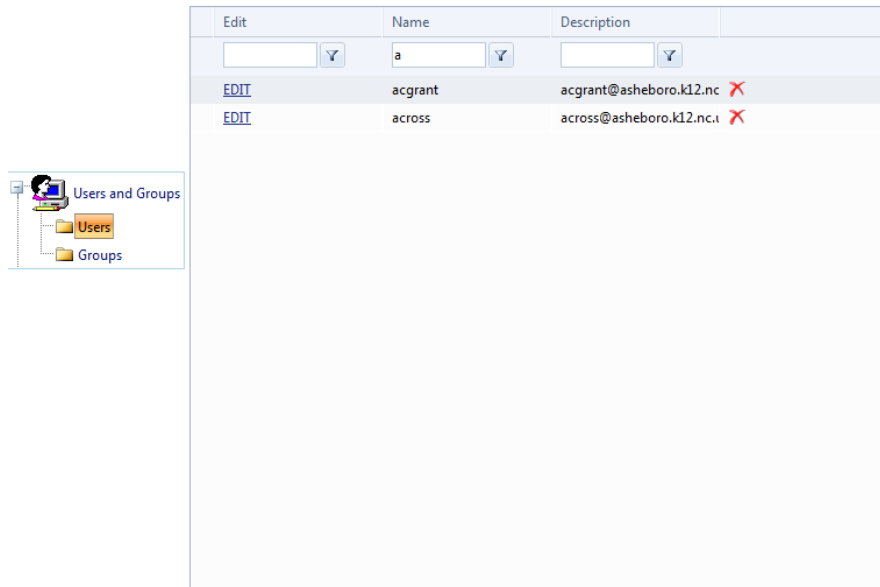
Click on the Transactions Tab to set values for the Transactions form for Web Work Orders. There, you can set values for each type of transaction. Click Save to save the values.





The screenshot shows a web interface for setting transaction values. At the top, there is a label 'Jack' followed by a 'Set same as.' dropdown menu. Below this are two tabs: 'Work Order Form' and 'Transactions', with the latter being the active tab. The main area contains a list of transaction types with corresponding dropdown menus for their values. The values are all set to 'None'. A note 'Value 1 = Invisible' is positioned above the 'Labor' dropdown. At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Close'.

Key	Value 1 = Invisible
Labor	None
Inventory	None
Purchases	None
Vehicle Travel	None
Transaction Totals	None

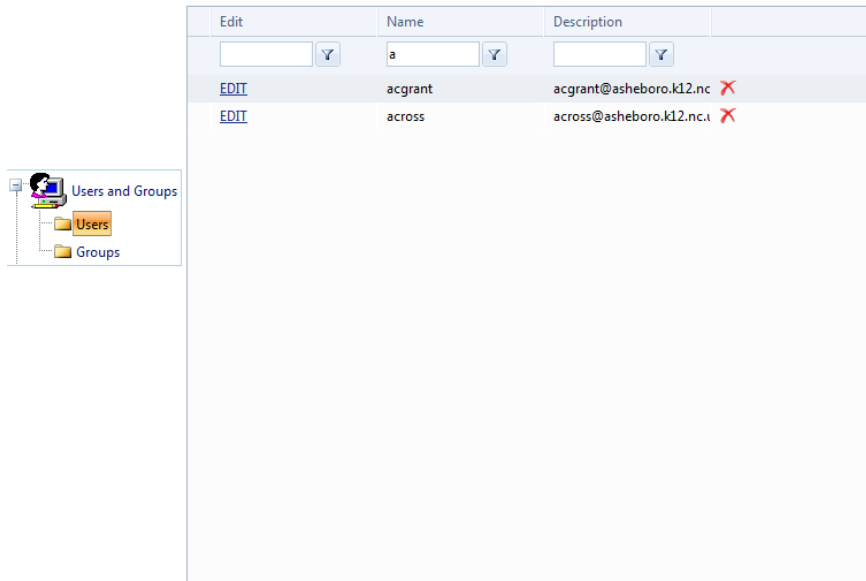
Editing an Existing User




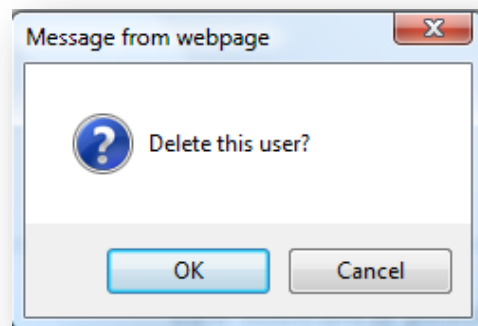
Edit	Name	Description
EDIT	acgrant	acgrant@asheboro.k12.nc 
EDIT	across	across@asheboro.k12.nc.t 

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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