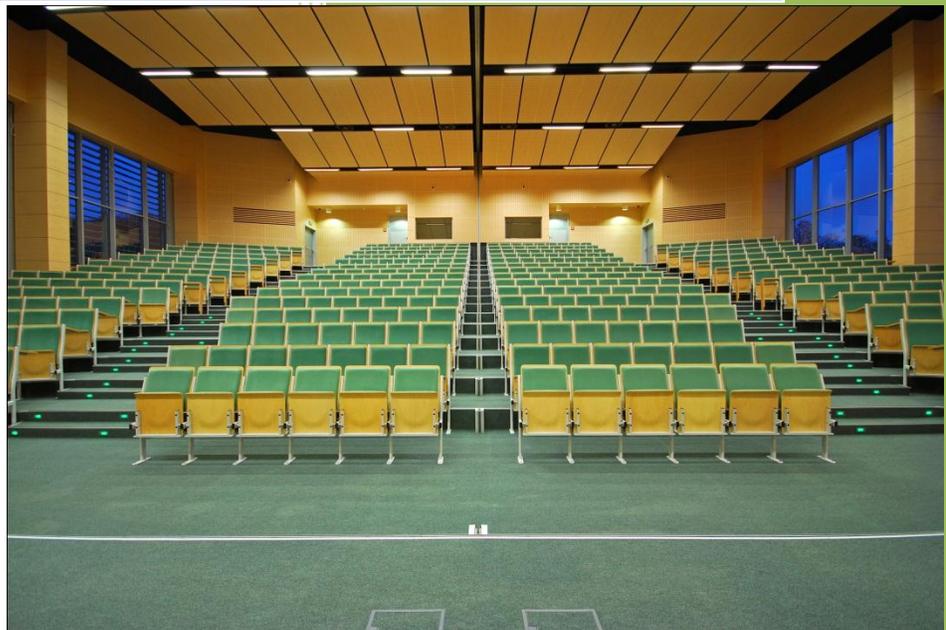




5.0 Admin Guide

WEB Location Editor



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WEB Location Editor User Guide

TeamWORKS Location Editor is used to create, modify or move locations in you path tree. Path structure can be built out to only specific buidings or all the way down to room levels. Although it is more tedious to go to the room level, there are advantages in doing so. Going to room level in your path structure will allow you to track attributes such as assets, building requests or work orders to a specific location.

***The Location Editor is an Administrative function, therefore must be enter by a TeamWORKS Administrator.**

***Pop up blockers should be turned off or exceptions to this site should be made if not functionality will be lost. Also some screen shots may vary depending upon the browser you use.**

NOTE: A Glossery of Field Definitions is located at the end of this User Guide.

1. Login to TeamWORKS



Figure 1

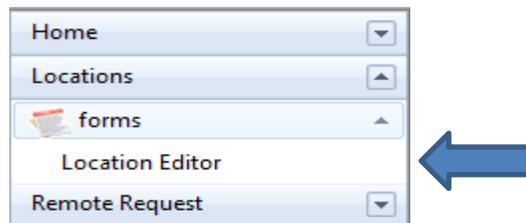


Figure 2

2. From the main menu Click on **Locations** and Select **Location Editor**.

Location Editor Main Form

Note: The location information in the form below is for demonstration purposes only.

Select a Location to Bind Properties.

Add Parent Location

- + Forsyth County S.S.
- + UTILITIES

Location Properties and Information.

Add Sub Location

Move Location

Move History

Delete Location

Is this an event schedule location?

Structure

General

Contacts

Account

Hazard

Additional

PathID: PathName:

ReferenceID: Path Type:

Longitude: Latitude:

Description:

Update Location

Figure 3

NOTE: The **PathID** is automatically system generated and you will be unable to change this.

Field Definitions:

Path ID – system generated field that populates when a new path is created. If you are recreating a previously deleted path, you can reenter that PathID here.

Path Name – enter a name for this Path.

Reference ID – Enter a location ID such as a school assigned code.

Path Type – Enter the Path Type for this location. (Campus, Building)

Longitude – Enter the geo location of this location.

Description – general description for this location.

Adding a Parent Location

- To add a PARENT LOCATION Click  button.
(*see Screen Shot Below)
- “This New Record will be a Parent Location” will display at the top right of the page.
- You will need to enter a **PathName** and **ReferenceID** . These fields are required before a new location can be saved. All other fields are optional.
- Click  and the Parent location will be saved.

Figure 4

Adding a Sub Location

7. In order to add a sub location you must select the parent (see screen shot example) in which it will fall under. Then click the **Add Sub Location** button

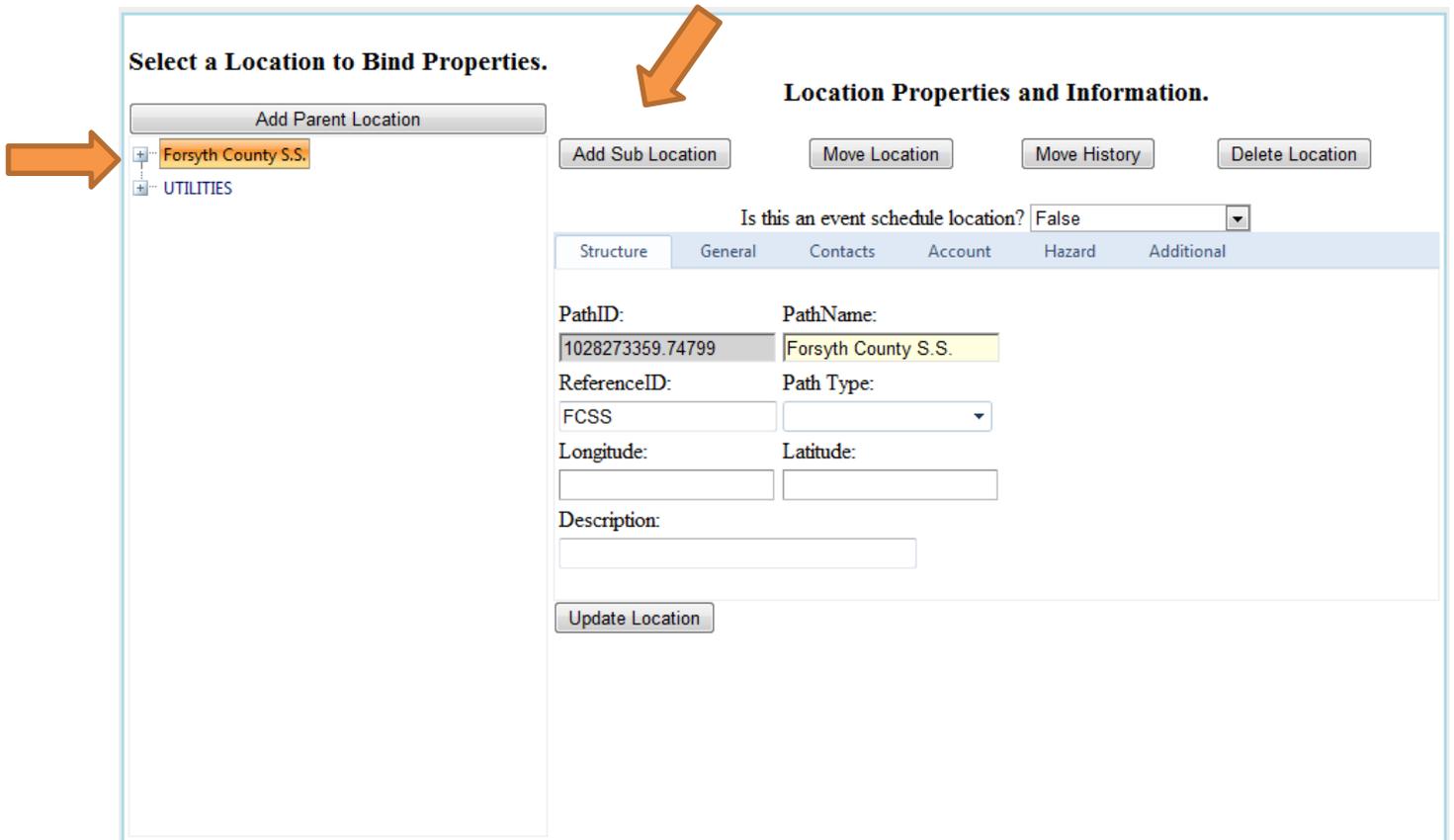


Figure 5

8. The new record will be a Child Location of the Location selected under Parent location.

Select a Location to Bind Properties.

This New Record will be a Child Location of Bus Shop-South

Location Properties and Information.

Is this an event schedule location?

Structure

PathID: PathName:

ReferenceID: Path Type:

Longitude: Latitude:

Description:

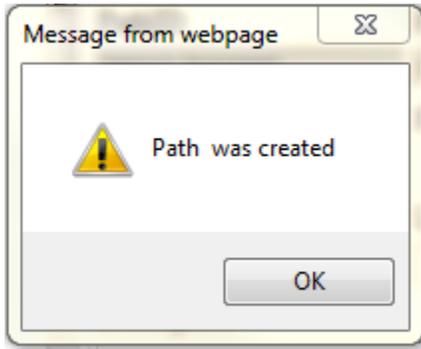
Figure 6

9. You will need to enter a **PathName** and **ReferenceID** . These fields are required before a new sub location can be saved. All other fields are optional.

10. Click to save the new record.

11. You will receive a confirmation message that the Path was created. Click OK (See Figure 7)

Figure 7



12. The new sub location is now visible on the Location Properties and Information page. (figure 8)

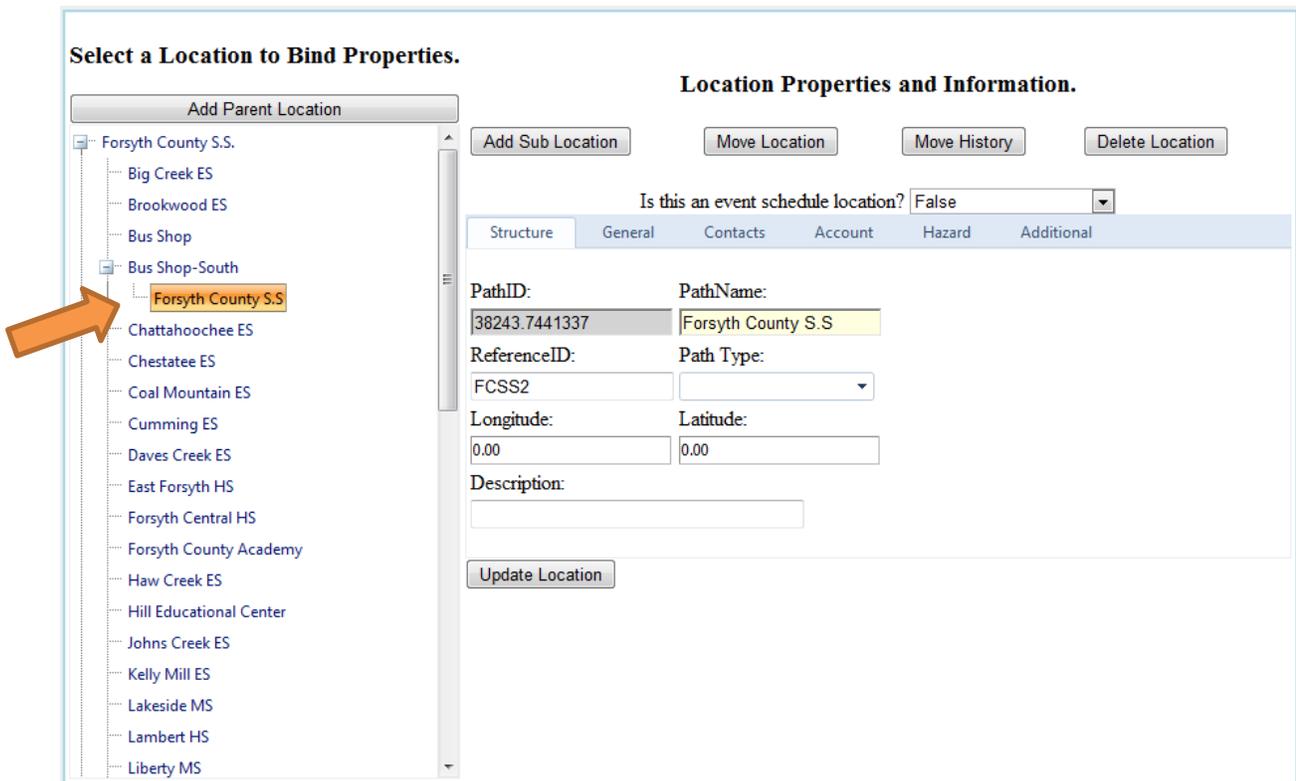


Figure 8

Moving a Location

13. To move a location, select the location that is to be moved from the Location area and Click

Move Location

at the top of the Location Properties and Information page.

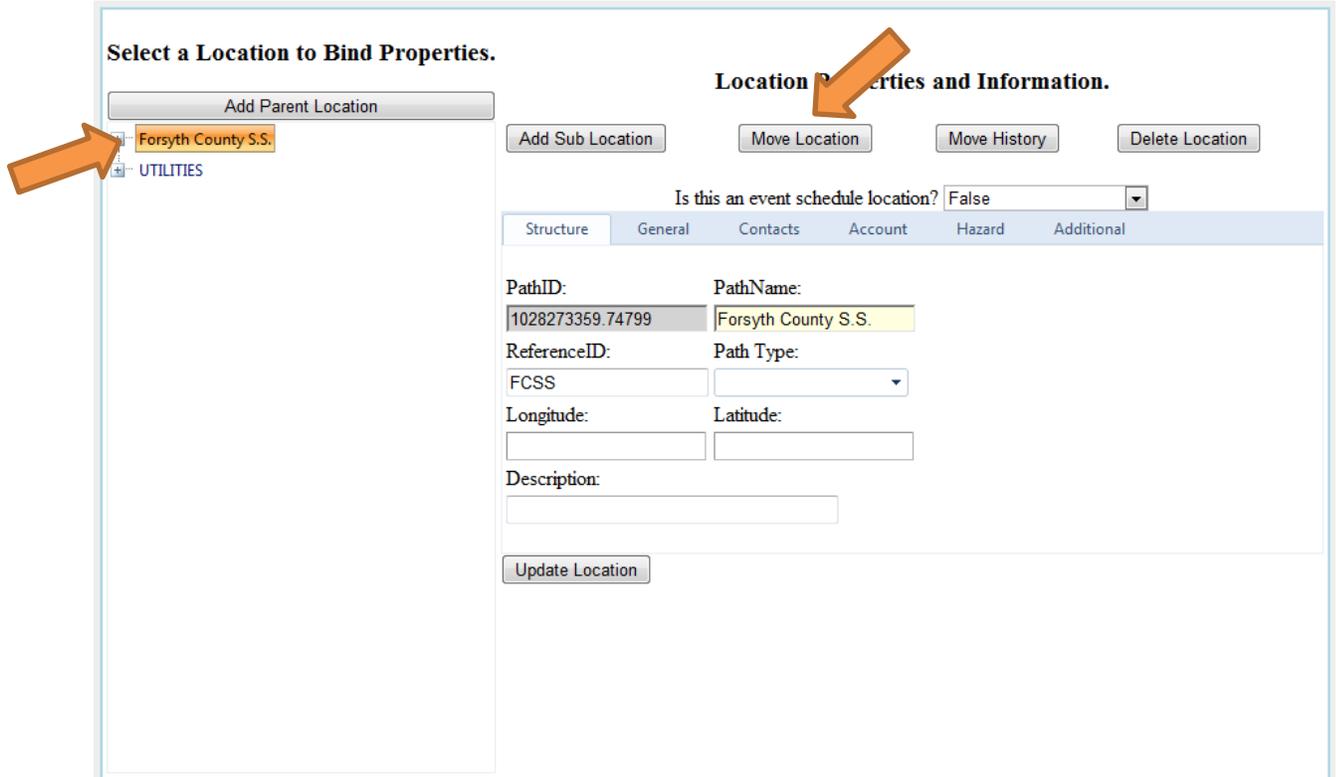


Figure 9

14. A new window will open asking you to select where you wish to move the location to. Drill down and Click on your desired location. This will highlight the location. Click the button to save your changes or you may Click to exit out of the option and no changes will be saved. (See figure 10)

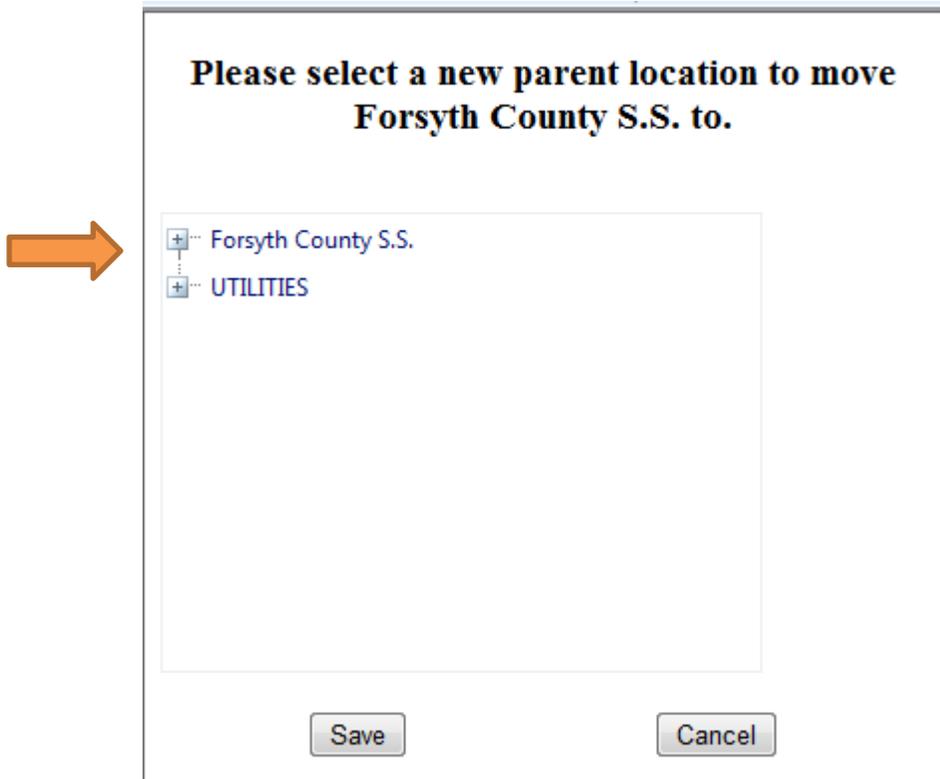


Figure 10

If the Save button was selected then you will then be shown the screen (Figure 11). Click the OK button. Your location has been moved.

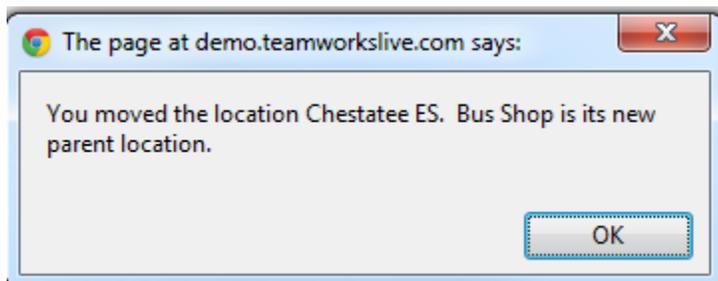


Figure 11

Moving history

15. Select the location you wish to move its history from the location pane and Click the

button. You will then be prompted with the following pop up (figure 12).

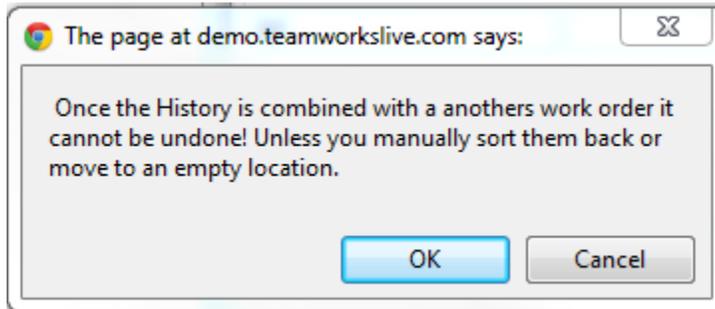


Figure 12

16. Select the location in which you wish to move the Work Order history.

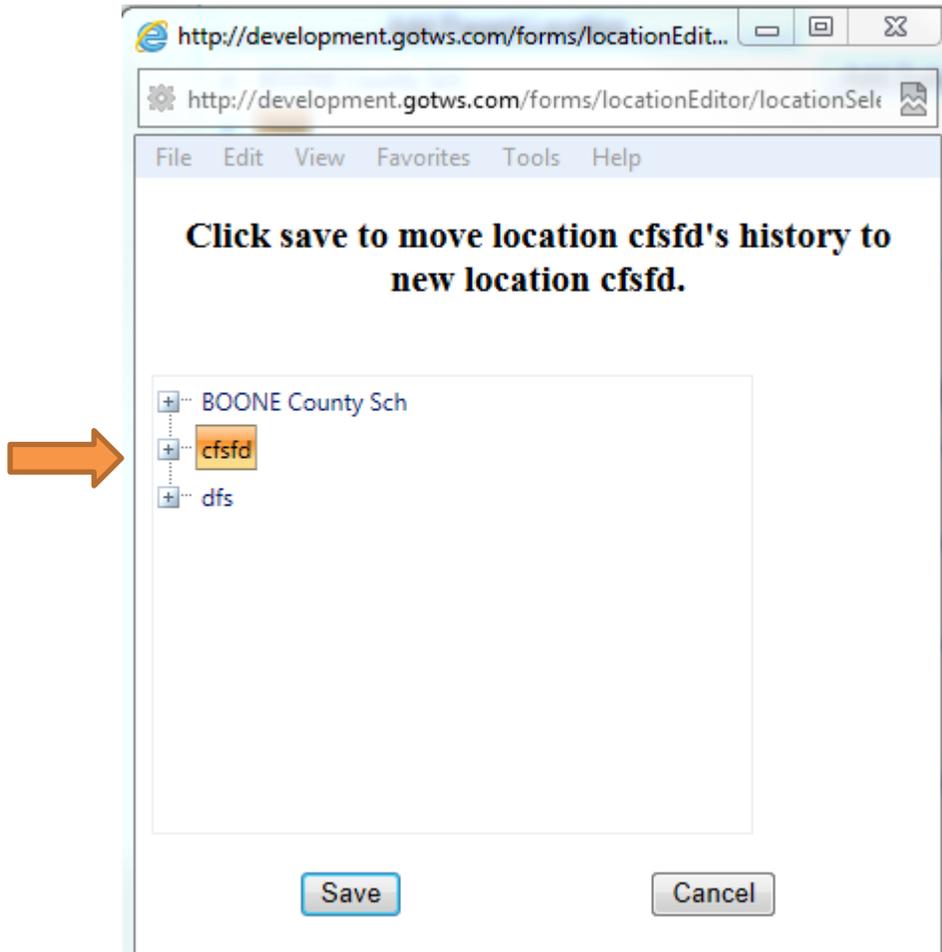


Figure 13

Deleting a Location

17. To Delete a Location you must first select the location you wish to delete from the location pane and click the button.

Warning: deleting a location can cause loss of data integrity.

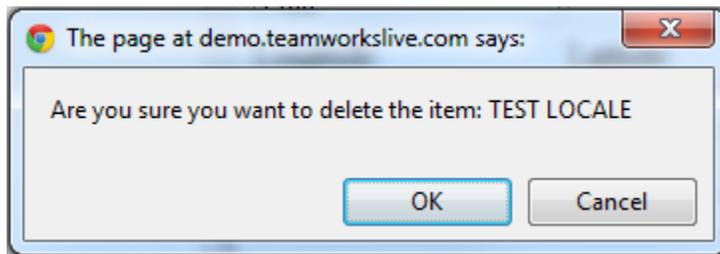


Figure 14

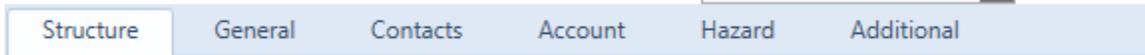
You will be prompted with a pop up (figure 14)

Click OK and your location will be deleted.

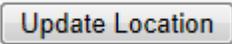
18. Is this an event schedule location? is an option for you to allow the location to be visible or used in the Event Scheduler portion of the Remote Request. It's a True or False option. By default the locations are set to False.

Creating or Updating Location Information

19. The same processes are used to update or enter information about any location. As you will notice there are several tabs.



20. By clicking the corresponding tab you can add information about the location as needed. Once

the information is inserted or changed be sure to Click  located at the bottom of each form in order for the information to be updated.

Structure:

PathName, ReferenceID, Path Type, Longitude, Latitude, and Description.

The screenshot shows the 'Structure' tab selected in a multi-tabbed interface. The form contains the following fields:

- PathID:** 1028273359.74799
- PathName:** Forsyth County S.S.
- ReferenceID:** FCSS
- Path Type:** (Dropdown menu)
- Longitude:** (Empty text box)
- Latitude:** (Empty text box)
- Description:** (Empty text box)

An **Update Location** button is located at the bottom of the form.

Figure 15

General:

Structure	General	Contacts	Account	Hazard	Additional
Name	Support Services	Total SQF		0.00	
State Code	8014	# of Occupants		0.00	
Address	441 Canton Hwy	MaxOccupancy		0.00	
City	Cumming	Mileage to Maintenance		0.00	
State	GA	Region			
Postal Code	30040	Country			

Figure 166

Contacts:

Structure	General	Contacts	Account	Hazard	Additional
Primary Contact		Fax Number	(678) 513-3877		
Phone Number	(770) 781-4889	Mobile Number	() -		
Secondary Number	() -	Pager Number	() -		
Email Address					

Figure 177

Account:

Structure	General	Contacts	Account	Hazard	Additional
Site Account Id					
Payment Terms					
Delivery Terms					

Figure 18

Hazard:

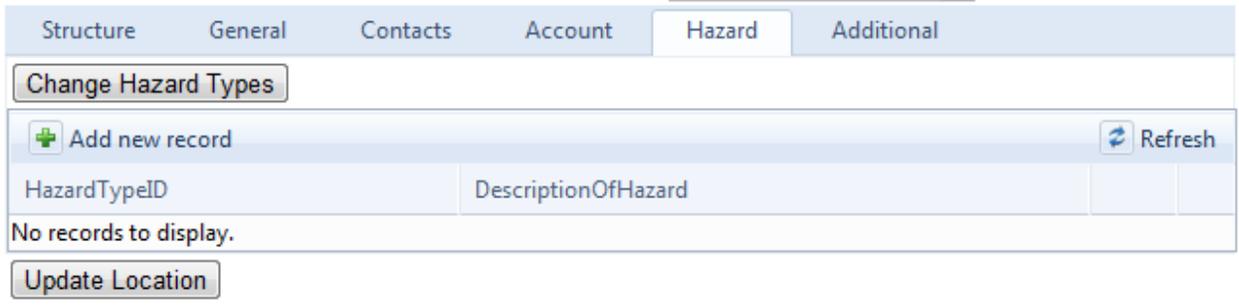


Figure 19

If you need to add Hazard Types click the button. You will then be prompted with the following screen (Figure 20).

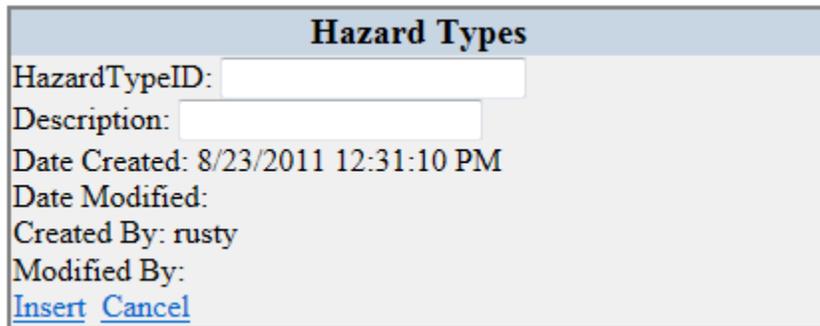


Figure 20

Type in the HarzardTypeID: example: Bio and Description: Blood. Then click Insert or cancel.

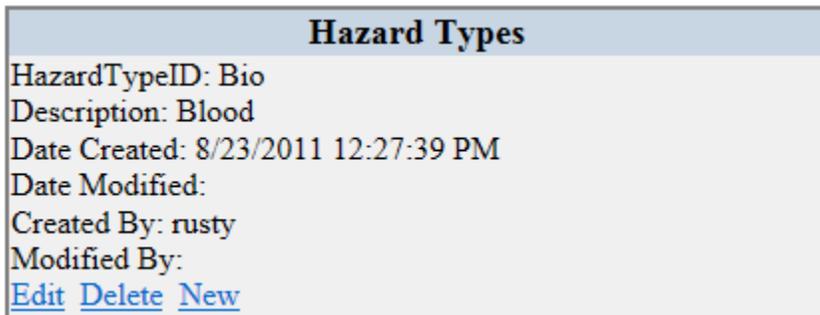
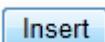
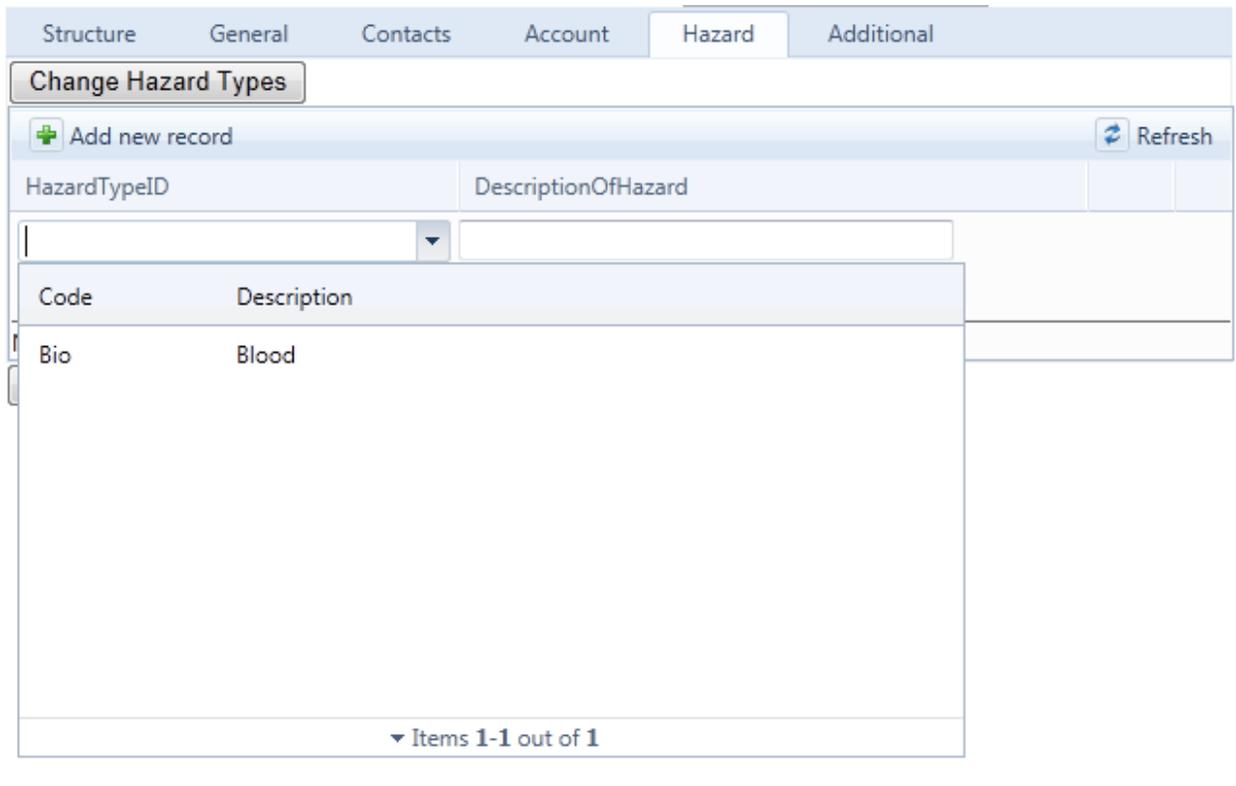


Figure 21

At this time you can Edit, Delete or Create a new record. Once complete just exit out of the window.

In order to add a new record Click  then you can select from the drop down menu and Click the  button.

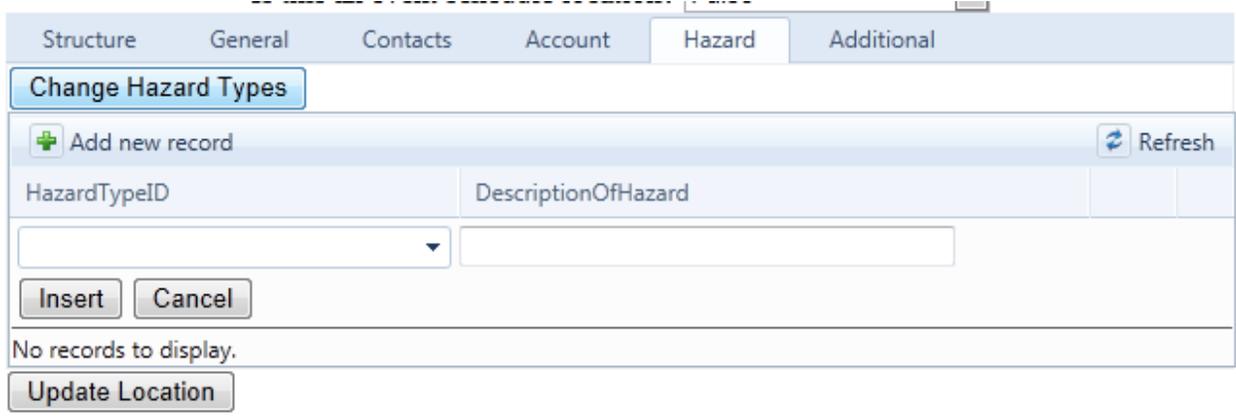


The screenshot shows a software interface with tabs: Structure, General, Contacts, Account, Hazard, and Additional. The 'Hazard' tab is active. A dialog box titled 'Change Hazard Types' is open. It contains an 'Add new record' button and a 'Refresh' button. Below these are two input fields: 'HazardTypeID' (a dropdown menu) and 'DescriptionOfHazard' (a text box). A table is displayed below the input fields with the following content:

Code	Description
Bio	Blood

At the bottom of the table area, it says 'Items 1-1 out of 1'.

Figure 22



This screenshot shows the same 'Change Hazard Types' dialog box. The 'HazardTypeID' dropdown menu is now empty. Below the input fields are 'Insert' and 'Cancel' buttons. The text 'No records to display.' is shown in the table area. At the bottom of the dialog box is an 'Update Location' button.

Figure 23

Structure	General	Contacts	Account	Hazard	Additional
Change Hazard Types					
+ Add new record					Refresh
HazardTypeID		DescriptionOfHazard			
Bio					
Insert		Cancel			
No records to display.					
Update Location					

Figure 24

Clicking  just refreshes the screen if you have added multiple records.

Additional:

This space is available for any information that may be needed that is not in the other tabs. Click Update location when complete.

Structure	General	Contacts	Account	Hazard	Additional
Update Location					

Figure 25

Customer Support

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