5.0 User Guide

Remote Request

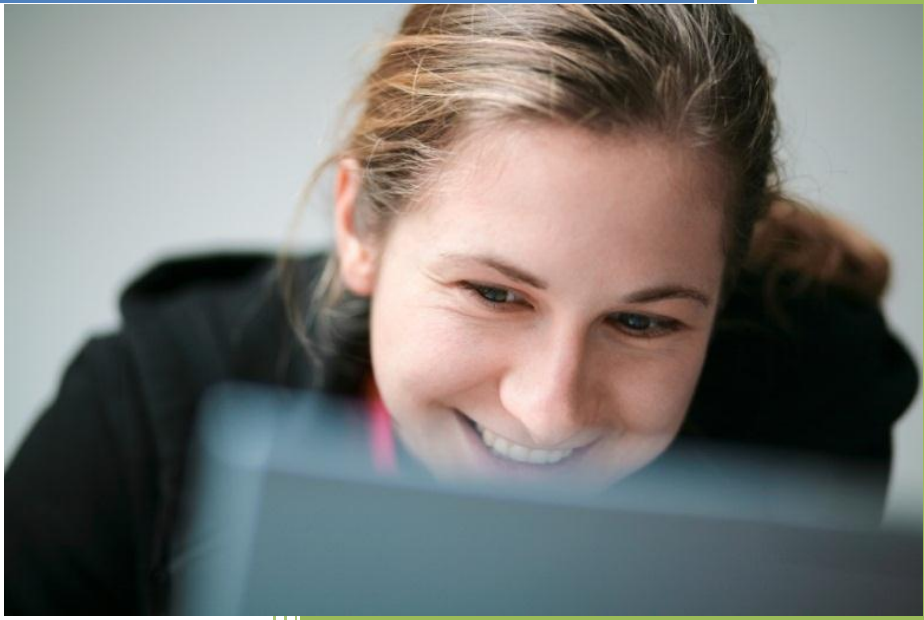

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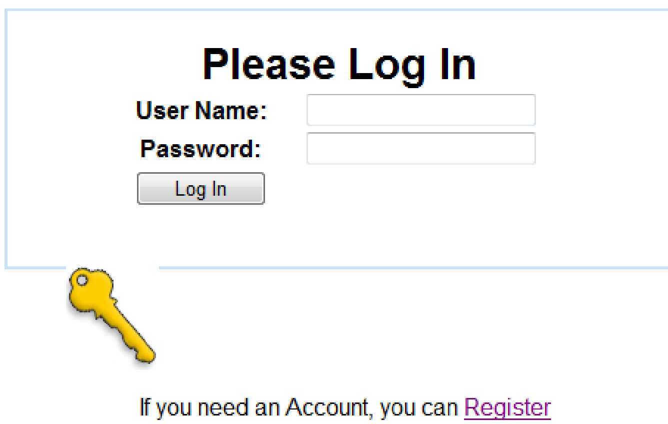
Table of Contents

Remote Request

TeamWORKS Remote Request allows for designated personnel to submit work orders, inventory and event requests using a standard web browser. The simple interface makes submitting requests quick and easy. Automatic e-mail notification keeps your customers up to date on the status of their work orders. Users can track the status of their submittal history and create reports for their designated locations limiting the number of calls to your office.

Login to TeamWORKS WEB

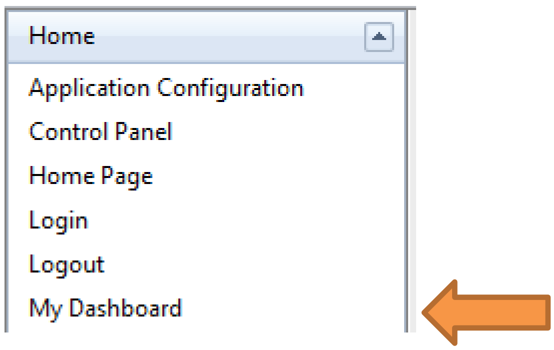


Set-Up

Remote Request User Dashboard and User Configuration

TeamWORKS has created a Remote Request User Dashboard to give users an interactive and visual access point to create Work Order Requests, Event Requests, and Inventory Requests. Activity can can also be viewed and retrieved from this point giving users a one stop portal for all their request needs.

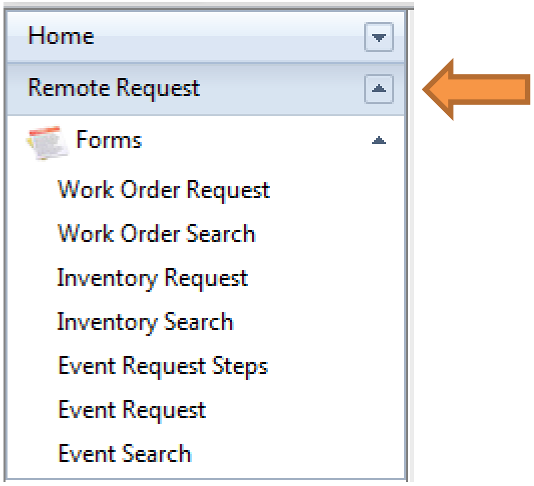
From the main menu, Click on the **Home** Tab and Select **My Dashboard**.



NOTE: Based on what permissions have been assigned you may or may not have the available options as seen in the below screen shots.

Click the checkbox at the top right of the screen to set the Dashboard as your homepage. The Dashboard will then be set as your homepage and you will be able to access it without using the main menu each time.

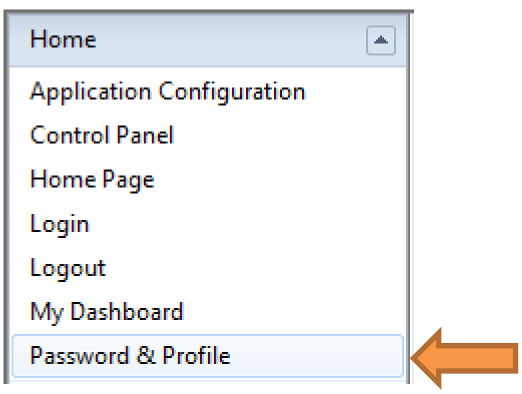
If you choose not to set the Dashboard as your homepage, you still can access the same functionality using the left pane selection of the main menu as seen below.



Password and Profile

The Password and Profile Tab allows users to reset their password.

NOTE: Option is only available if your TeamWORKS Administrator enabled this option



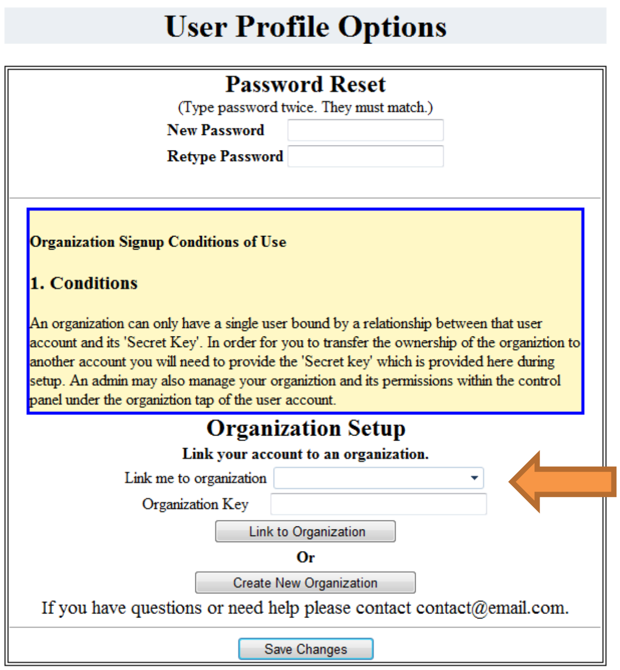
The following screen will appear:

If you are only resetting your password just enter the new password and then Re-type the password at the top of the page. Click Save Changes.

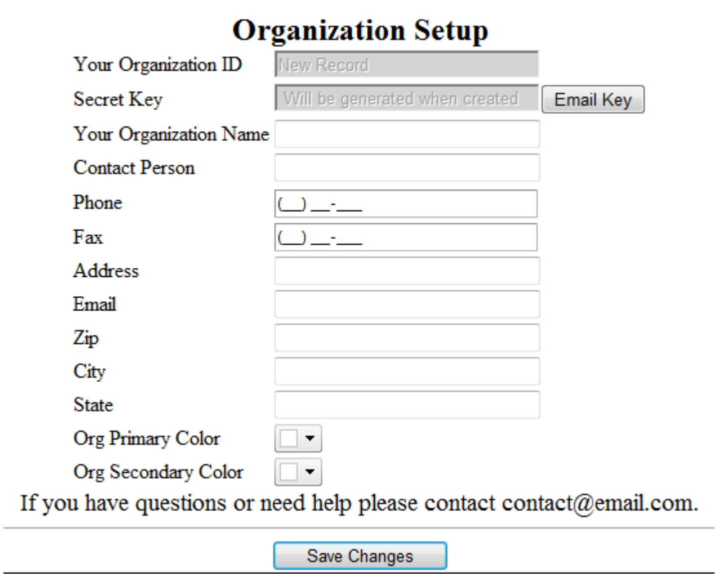
Organization Setup

Organization setup allows user to transfer ownership to another individual of this organization.

NOTE: This option is ONLY for the Event Scheduler portion of Remote Request.



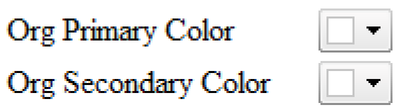
After reading the terms of use, users can link to their organizations. **Link me to organization** allows the user to link their account to an organization by simply selecting an organization from the dropdown. If an organization is not listed, click the **Create New Organization** button to get the following screen:



Your Organization ID: System generated field. User cannot modify.

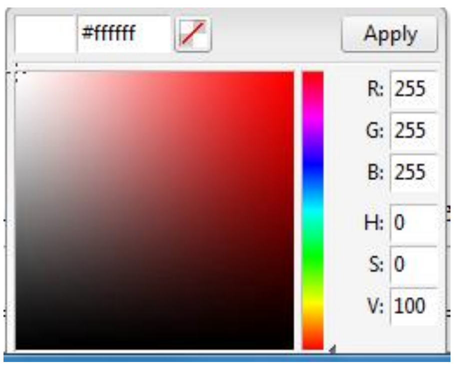
Secret Key: System generated field. Once a record is saved it can be emailed to other users.

The other fields are self-explanatory. Enter what information you have about your organization:



You can also select your organizations primary and secondary colors if you choose by clicking the arrow down beside each. These colors are used to identify your organization on the calendar views.

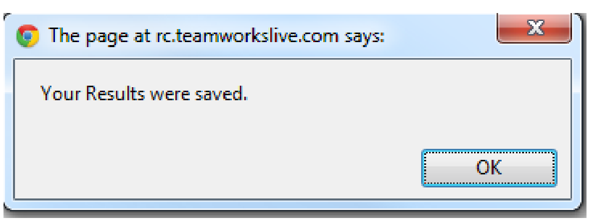
You will then be prompted by the following screen:,



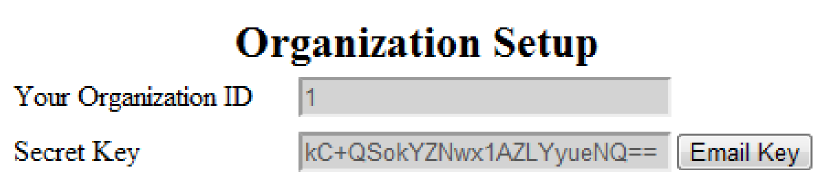
Click in the field to select a color close to your organizations. Click Apply.

Then Click Save Changes when complete.

You will then be prompted with the following confirmation page:



You will now be able to view and email the key



The users default mail application will then launch and the user can then email the key to the appropriate user.

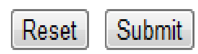
Using Your Remote Request

Work Order Request

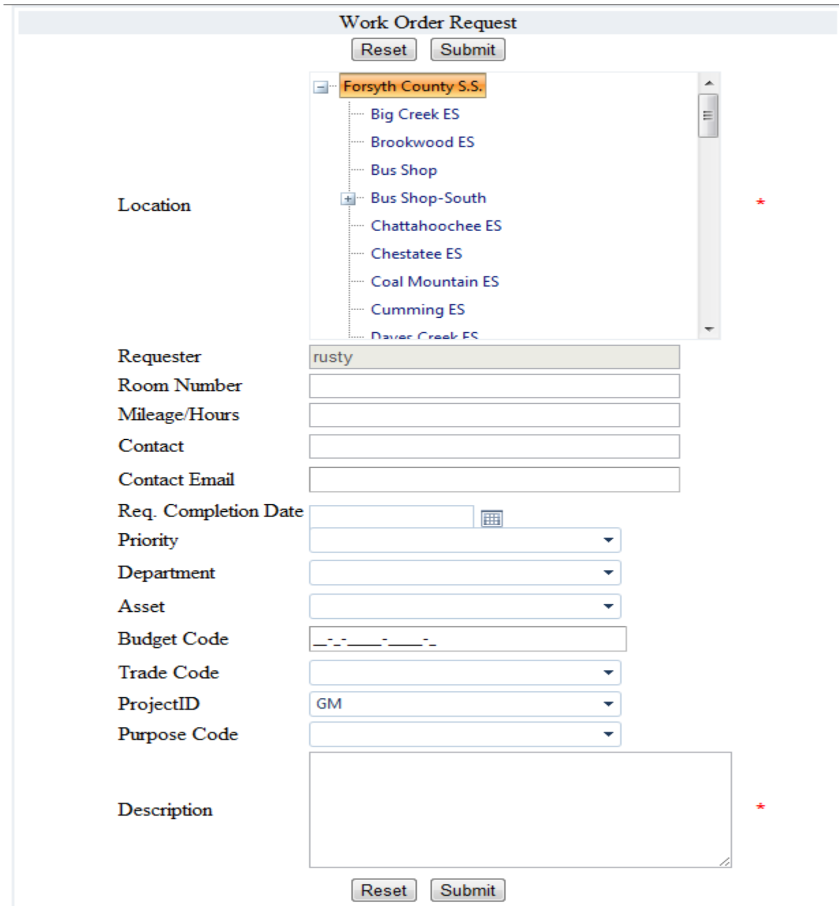
The Work Order Request application allows users to submit their work order requests via the dashboard or the Remote Request selection on TeamWORKS main menu.

NOTE: you may not have all the fields as shown in the below examples, these are determined by your local TeamWORKS Administrator. Some fields may or may not be required. The system will prompt you to enter data into fields that are required before submitting.

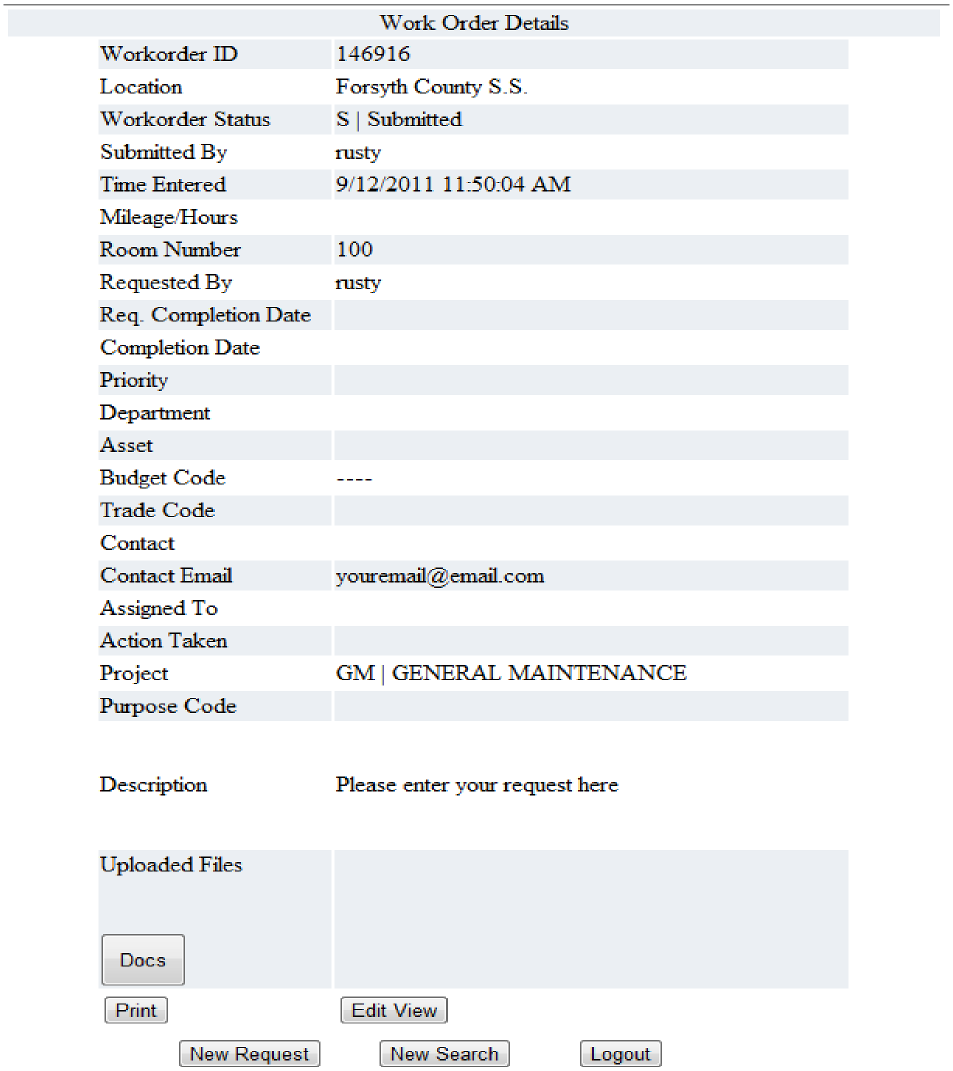
Submitting a request

1. Select your location *(by default and base on your configuration the location is already selected)*
2. Complete the other fields *(If the field has a Red Asterisks to the right to of it then it is a required field).*
3. Click the Reset button(if you need to start over) or Submit your request 

4. Once the appropriate information is filled in, the user can click the Submit button to create the work order request.



5. A confirmation page will then load showing a newly assigned Work Order ID along with other information. The status will automatically be placed to Submitted for all new work order requests, until the status is changed in the maintenance department.



Work Order Details	
Workorder ID	146916
Location	Forsyth County S.S.
Workorder Status	S | Submitted
Submitted By	rusty
Time Entered	9/12/2011 11:50:04 AM
Mileage/Hours	
Room Number	100
Requested By	rusty
Req. Completion Date	
Completion Date	
Priority	
Department	
Asset	
Budget Code	----
Trade Code	
Contact	
Contact Email	youremail@email.com
Assigned To	
Action Taken	
Project	GM | GENERAL MAINTENANCE
Purpose Code	
Description	Please enter your request here
Uploaded Files	

Docs

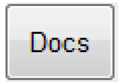
Print Edit View

New Request New Search Logout

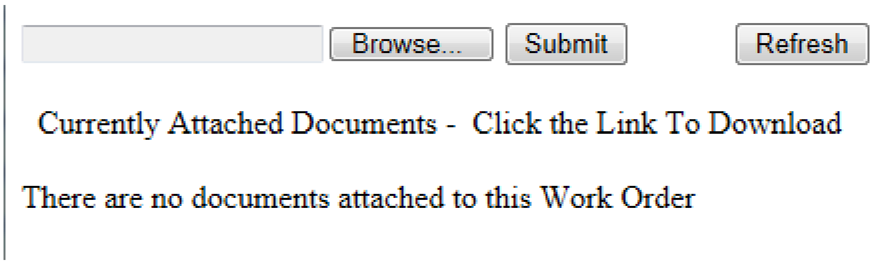
Once Submitted, Users can attach a document, print the request, edit the request, create a new request, do a new Search or logout of TeamWORKS.

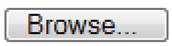
NOTE: you are only able to attach documents or edit the view if the status of the work order is SUBMITTED.

Attaching a document

1. Click 

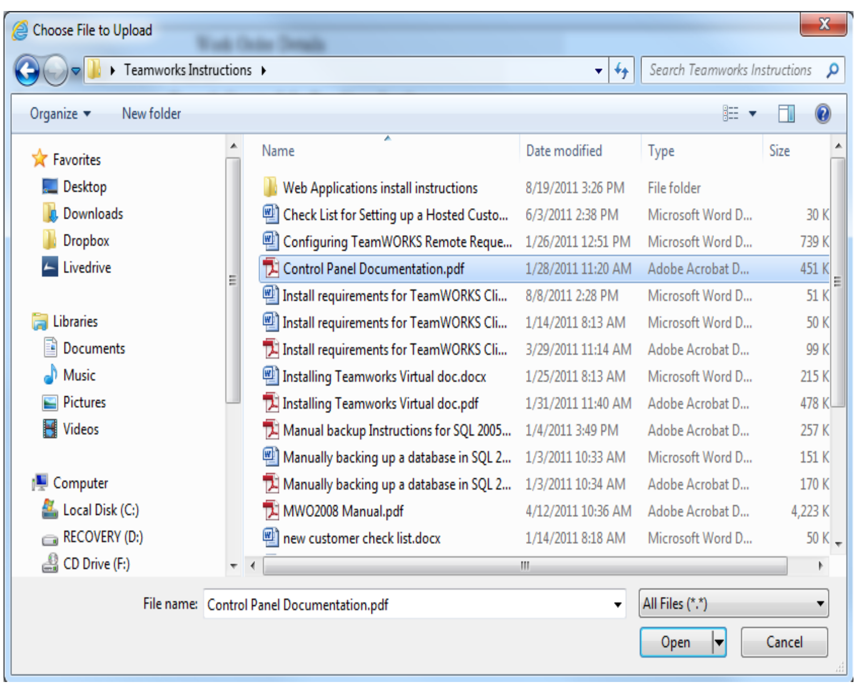
2. This will load the following prompt:



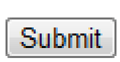
3. Click 

to select the file you wish to attach to the Request

4. Browse to the file location of the document you wish to attach then click open

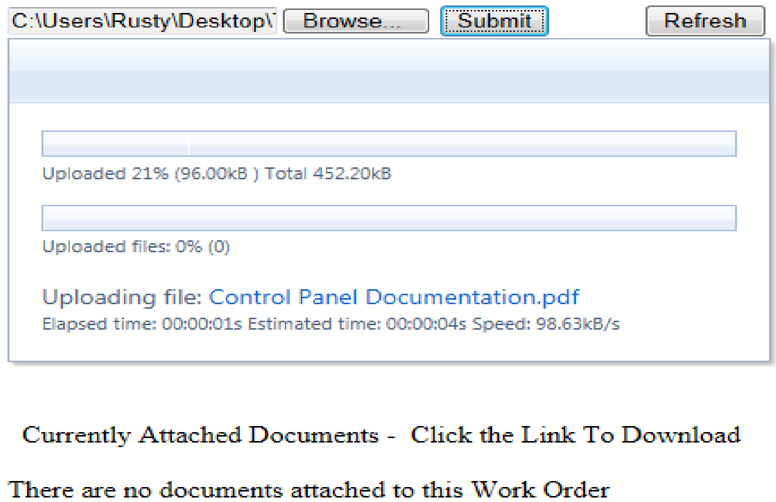


5. Click the Open button at the bottom right of the screen to select the file locatation of the document.

6. Click 

to upload the file.

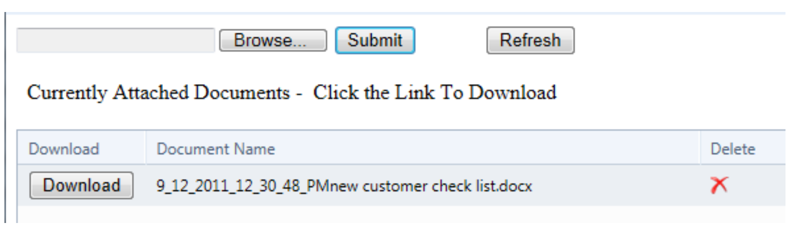
The following screen will appear as the file is uploading:



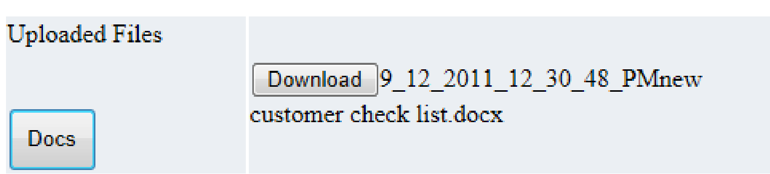
7. After upload is complete you may attach another document or delete an existing document.

The Refresh button will refresh the screen you are on.

8. Once you are done attaching the document(s) just exit out of the page, click the X located at the top right of page

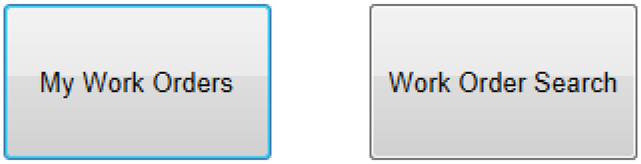


9. You will then be taken back to the original request where you will then be able to see the document has been attached. You may have to refresh the page in order to see the document.



Work Order Search

The Remote Request application also allows users to search for work order requests they have submitted previously. Clicking on the **Work Order Search** link will bring up the following page:



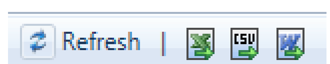
The **My Work Orders** button will automatically filter all work orders submitted by the username of the person logged in. Clicking "**My Work Orders"** will show you all the work orders that you have submitted.


Work Order List

New Work Order Search

Refresh

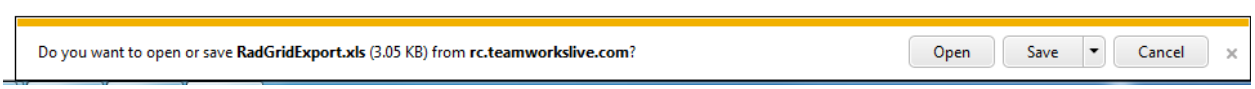
WorkOrderID	Location	Received Date	Comp. Date	Status	Priority	Description	Resolution
146919	Forsyth County S.S., Bus Shop-South	09/12/2011		S		fdfsdfsdfsdf	
146917	Forsyth County S.S., Chattahoochee ES	09/12/2011		S		ttttt	
146916	Forsyth County S.S.	09/12/2011		S		Please enter your request here	
146915	Forsyth County S.S., Big Creek ES	09/12/2011		S		This is an Example of entering your work request	
146914	Forsyth County S.S., Cumming ES	09/07/2011		A		testssssss	
146903	Forsyth County S.S., Sawnee ES	08/23/2011		A		This is a Test for Demonstration only.	

Simply click on the **Work Order ID** to view the work order. 

These options will Refresh the page, Export the files to Excel or Word.

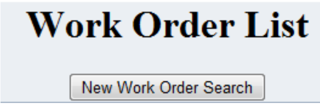
located in the bottom right of the screen will allow you to Export to Excel.

Note: Microsoft Excel or Word would have to be installed on your local machine in order for these options to work. Depending on your browser and browser settings you may have to open or save this option. In the below example using Internet Explorer 9 I am prompted to open/save or cancel.

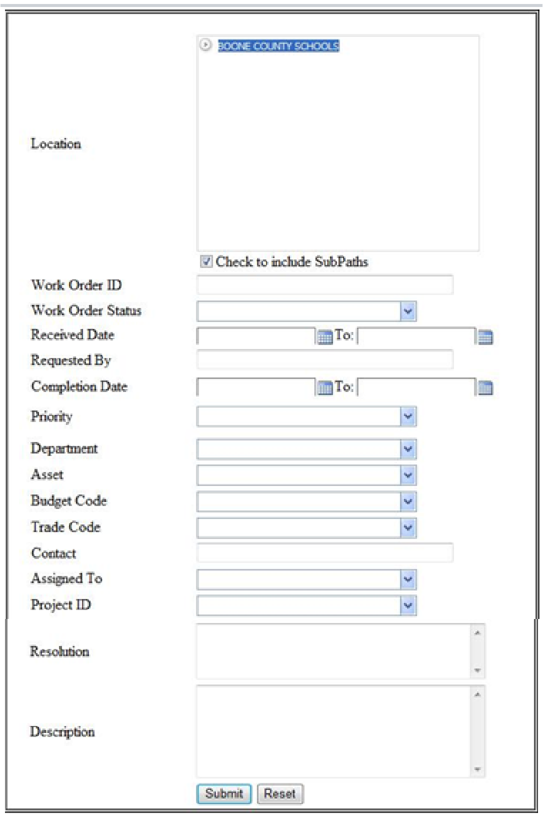


*NOTE: To get back to the "**My Work Orders**" Screen you will have to either repeat the process or click the back button located in your browser.*

A more advanced search tool can be accessed by clicking the **New Work Order Search** button at the top of the Work Order List page.



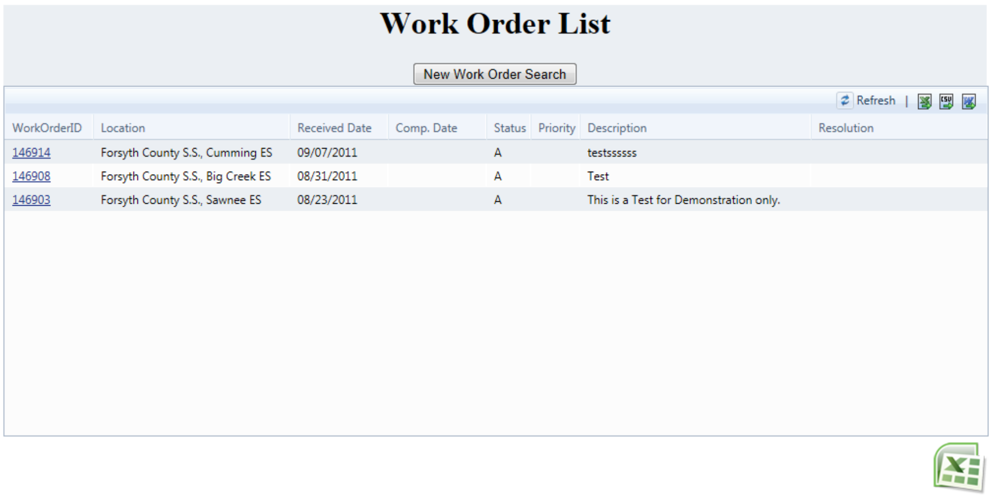
This will yield the following search page:



The search page allows several filtering options and allows for multiple fields to be filled in narrowing the search even further. Users have the ability to search by:

Location	Work Order ID	Status
Received Date Range	Requested By	Completion Date Range
Priority	Department	Asset Tag Number
Budget Code	Trade Code	Contact
Assigned To	Project ID	Resolution
Description		

When the criteria are entered, the user can simply click the **Submit** button to pull back the desired results as shown below.



WorkOrderID	Location	Received Date	Comp. Date	Status	Priority	Description	Resolution
146914	Forsyth County S.S., Cumming ES	09/07/2011		A		testssssss	
146908	Forsyth County S.S., Big Creek ES	08/31/2011		A		Test	
146903	Forsyth County S.S., Sawnee ES	08/23/2011		A		This is a Test for Demonstration only.	

Search Tips:

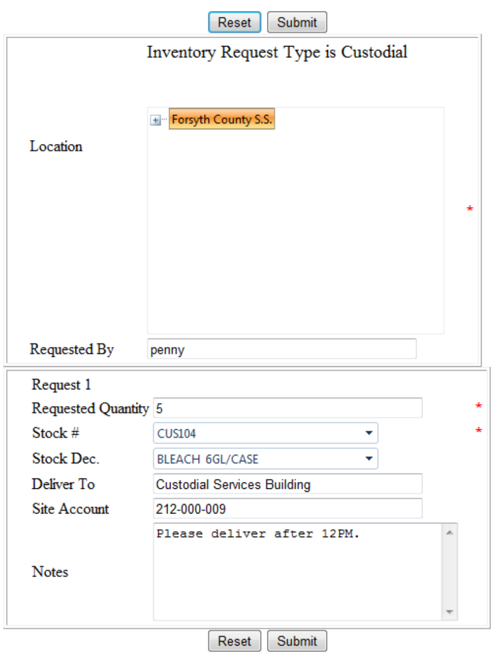
- By leaving the check box on Check to Include SubPaths, the results will return work order requests for the selected path as well as its children paths. Uncheck it to return requests ONLY to that path.
- If the user leaves a field blank, then the query will return ALL values. (i.e. leaving the Status blank will return ALL work order requests regardless of status. Selecting 'Approved' from the list will return ONLY Approved work order requests.
- Resolution and Description – enter a keyword such as 'window' (without the single quotes) in the description returns all work order requests with the word window in the description. No wildcards are needed.
- Searching Dates: if you want to see the work orders that were submitted (received) on a specific date, then use the same date on both the From and To fields.

Inventory Request

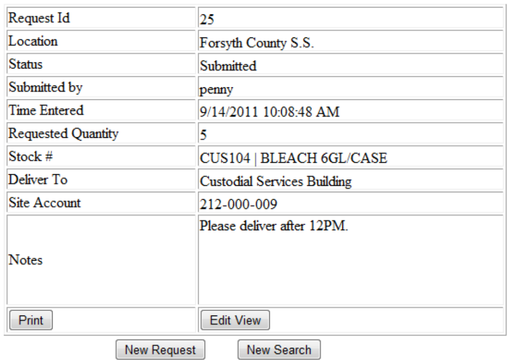
Users can submit requests for Custodial and Instructional inventory using the Remote Request Application. To submit an Inventory request, click the **Inventory Request** tab from the Remote Request menu or Dashboard. You are given the option to request Custodial or Instruction inventory.

NOTE: you may not have all the fields as shown in the below examples, these are determined by your local TeamWORKS Administrator. Some fields may or may not be required. The system will prompt you to enter data into fields that are required before submitting.

Custodial Inventory Request – To submit a Custodial Request, click the Custodial Request button. This will bring up the form shown below. Simply fill out the information for the desired inventory item then hit the Submit button.



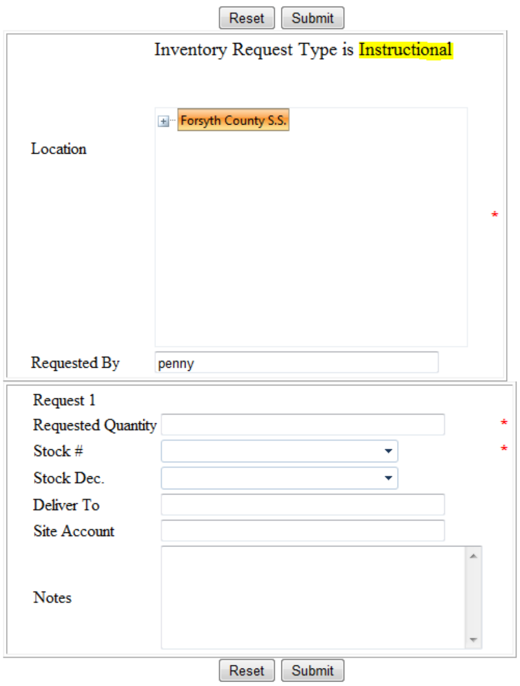
The following confirmation page appears indicating Request ID and other information. As long as the request is still in Submitted status, the users can make changes to the request.



Request Id	25
Location	Forsyth County S.S.
Status	Submitted
Submitted by	penny
Time Entered	9/14/2011 10:08:48 AM
Requested Quantity	5
Stock #	CUS104 | BLEACH 6GL/CASE
Deliver To	Custodial Services Building
Site Account	212-000-009
Notes	Please deliver after 12PM.
Print	Edit View

New Request New Search

Instructional Inventory Request - To submit an Inventory Request for Instructional Inventory, click the Instructional Request button. This will bring up the following form. Simply fill out the information for the desired inventory item then hit the Submit button.



Reset Submit

Inventory Request Type is Instructional

Location Forsyth County S.S. *

Requested By penny

Request 1

Requested Quantity *

Stock # *

Stock Dec.

Deliver To

Site Account

Notes

Reset Submit

The following confirmation page appears after hitting the Submit button, indicating Request ID and other information. As long as the request is still in Submitted status, the users can make changes to the request. Once the request is any status other than Submitted, the user is locked from making any changes to the request.

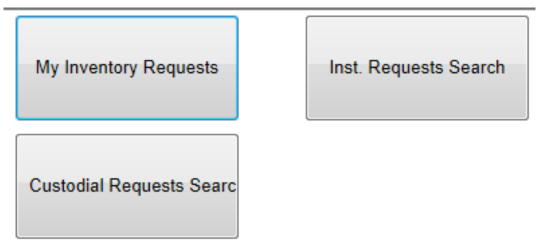
Request Id	25
Location	Forsyth County S.S.
Status	Submitted
Submitted by	penny
Time Entered	9/14/2011 10:08:48 AM
Requested Quantity	5
Stock #	CUS104 | BLEACH 6GL/CASE
Deliver To	Custodial Services Building
Site Account	212-000-009
Notes	Please deliver after 12PM.
Print	Edit View

New Request   New Search

Inventory Search

Searching for inventory requests is just like searching for work orders. Click **Inventory Search** tab from the Dashboard or main menu.

NOTE: you may not have all the fields as shown in the below examples, these are determined by your local TeamWORKS Administrator. Some fields may or may not be required. The system will prompt you to enter data into fields that are required before submitting.



My Inventory request filters out your request you have submitted to the system.

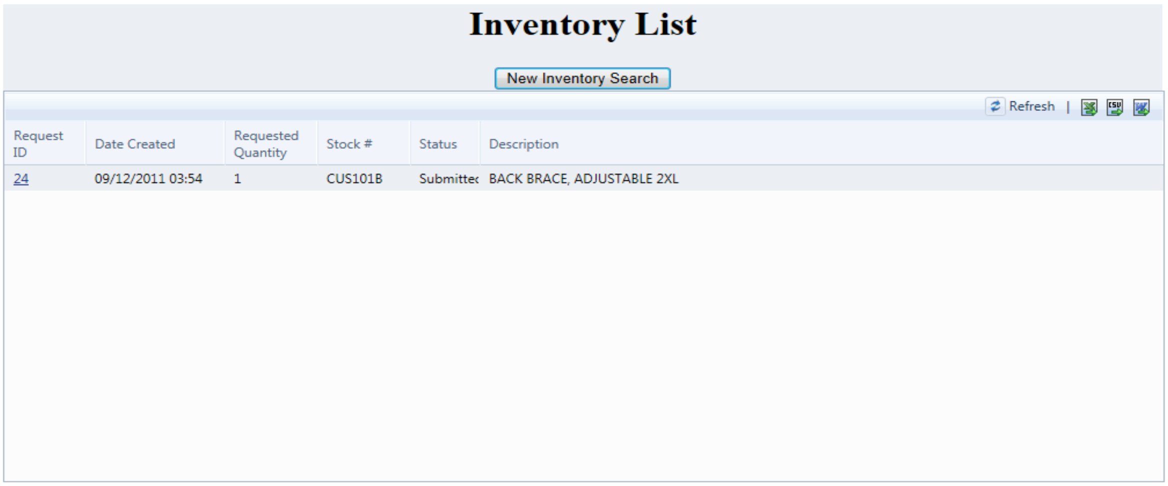
Instructional Request Search allows you to search Instructional Request only.

Custodial Request Search allows you to search Custodial Request only.

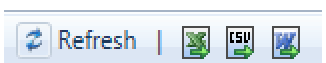
My Inventory Request

Clicking 

provides you with a list of all your request



The results of the search are displayed in a grid with the ability to view details of each request individually by clicking the **Request ID.**



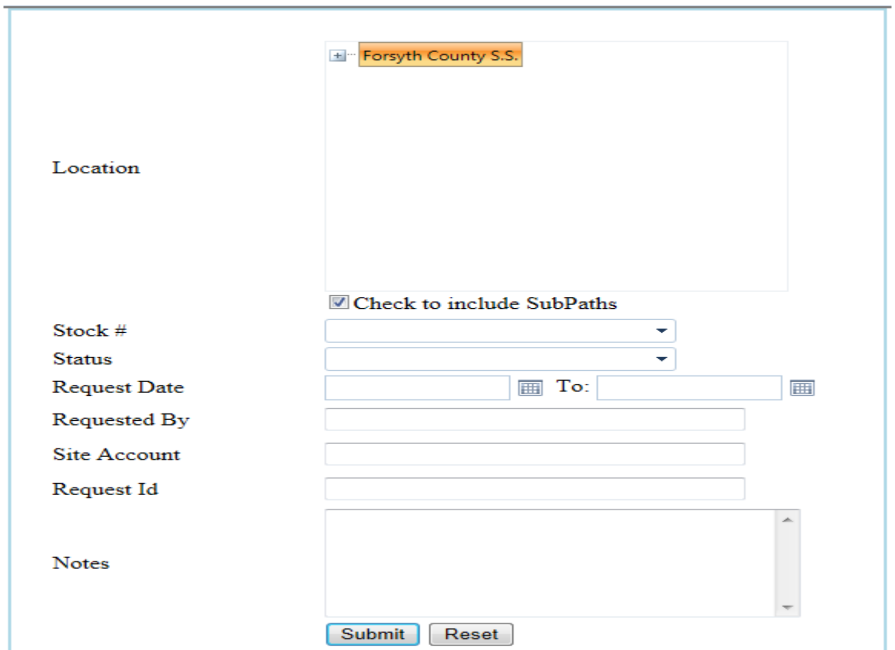
These options will Refresh the page, Export files to Excel or Word.


icon located at the bottom right of the screen will allow you to Export to Excel.

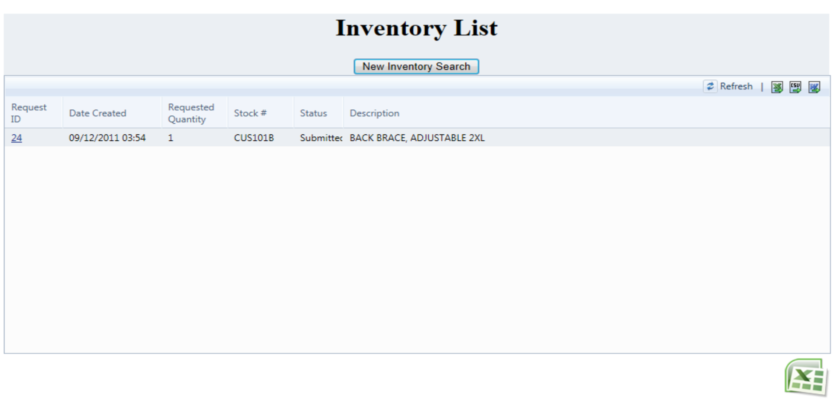
Note: Microsoft Excel or Word would have to be installed on your local machine in order for these options to work. Depending on your browser and browser settings you may have to open or save this option. In the below example using Internet Explorer 9 I am prompted to open/save or cancel.

Instructional Requests Search and Custodial Requests Search

Clicking the **Inst. Requests Search** or the **Custodial Requests Search** buttons will yield the following screen. The user can search by any of the fields identified below. To narrow the search, enter more parameters then click the **Submit** button.



The results of the search are displayed in a grid with the ability to view details of each request individually by clicking on the **Request ID** number.

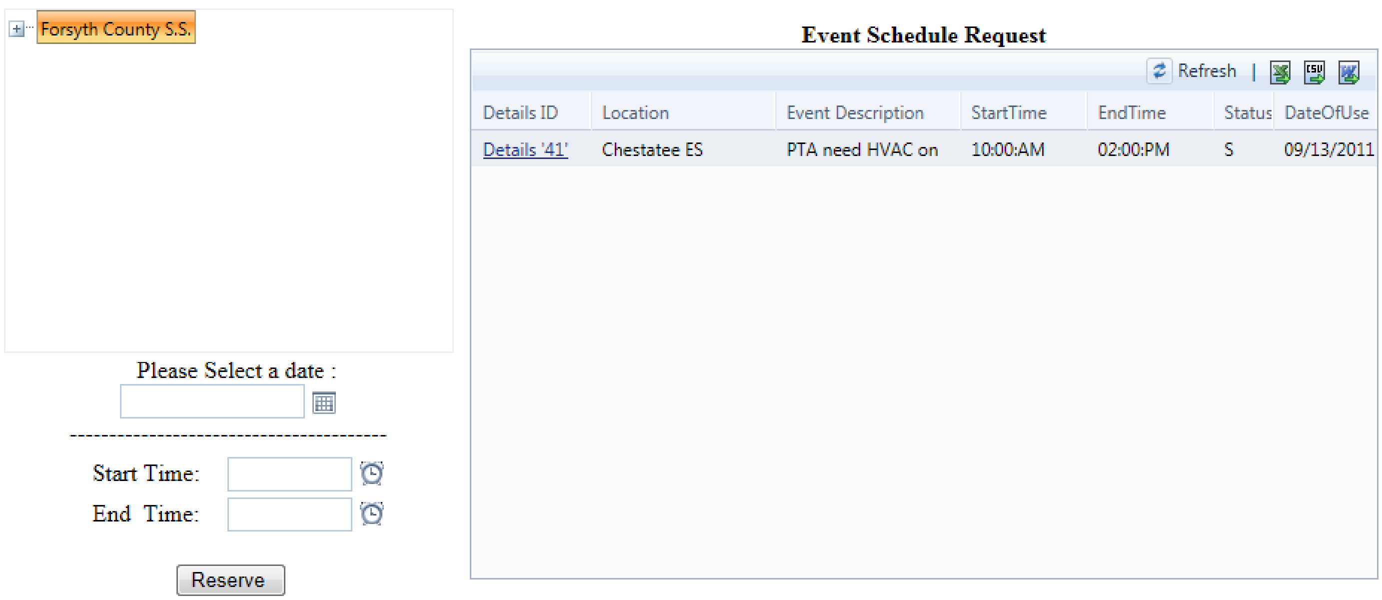


Event Request

Event Scheduling is used for reserving facilities for usage by either internal organizations or outside organizations.

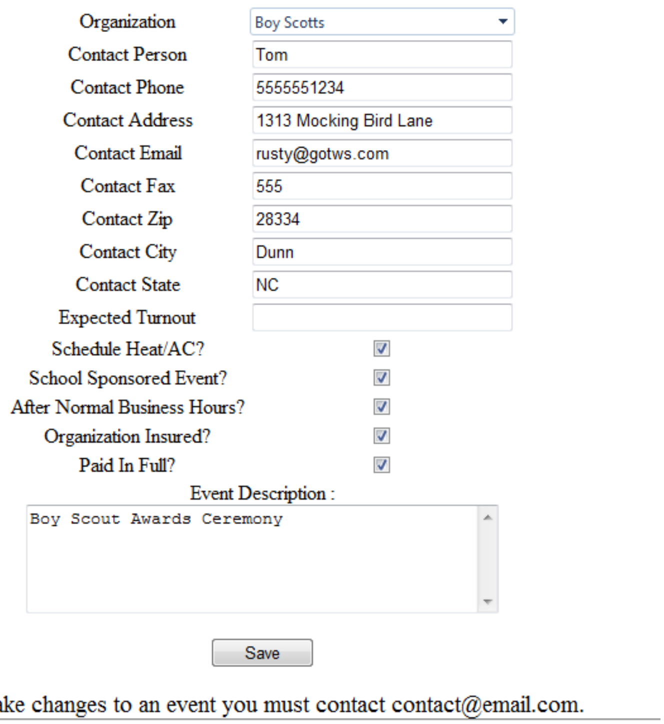
NOTE: you may not have all the fields as shown in the below examples, these are determined by your local TeamWORKS Administrator. Some fields may or may not be required. The system will prompt you to enter data into fields that are required before submitting.

To request an event, the user must first select a location for the event. As the user navigates to the appropriate location, the grid will filter out any existing schedules for the selected location. After a date is selected from the menu, the grid will filter out again based on the location and date selected. Start time and end time can now be entered in 1 hour intervals. Should you have a start time of, say, 1:30, select the 1:00 PM then change the :00 to :30. The user can then click the **Reserve** button.



To make changes to an event you must contact contact@email.com.

If there are no conflicts, the user will then see a screen like the one below. The user can select the Organization from the drop-down menu or type in their own Organization. Organizations must be set up in the client portion of TeamWORKS. If the organization is selected from the drop-down menu, the contact info will auto fill for that organization.



Organization – select or enter the Organization that will be using the space for the event.

Contact Person – enter the name of the primary contact person for the organization.

Contact Phone – enter the name of the primary contact's phone number.

Contact Address – enter the name of the primary contact's address.

Contact Email – enter the name of the primary contact's email address.

Contact Fax - enter the name of the primary contact's fax number.

Contact Zip - enter the name of the primary contact's zip code.

Contact City - enter the name of the primary contact's city.

Contact State - enter the name of the primary contact's state.

Expected Turnout – enter the number of expected people for the event.

Schedule Heat/AC? – check this box if the facility will need conditioning such as heat or A/C.

School Sponsored Event? – check this box if this is a school sponsored event.

After Normal Business Hours? – check this box if this event will take place after normal business..

Organization Insured? – check this box if the organization requesting the facility is insured.

Paid in Full? – check this box if the organization has paid for their facility rental in advance.

Event Description – enter a description for the event that the request is for.

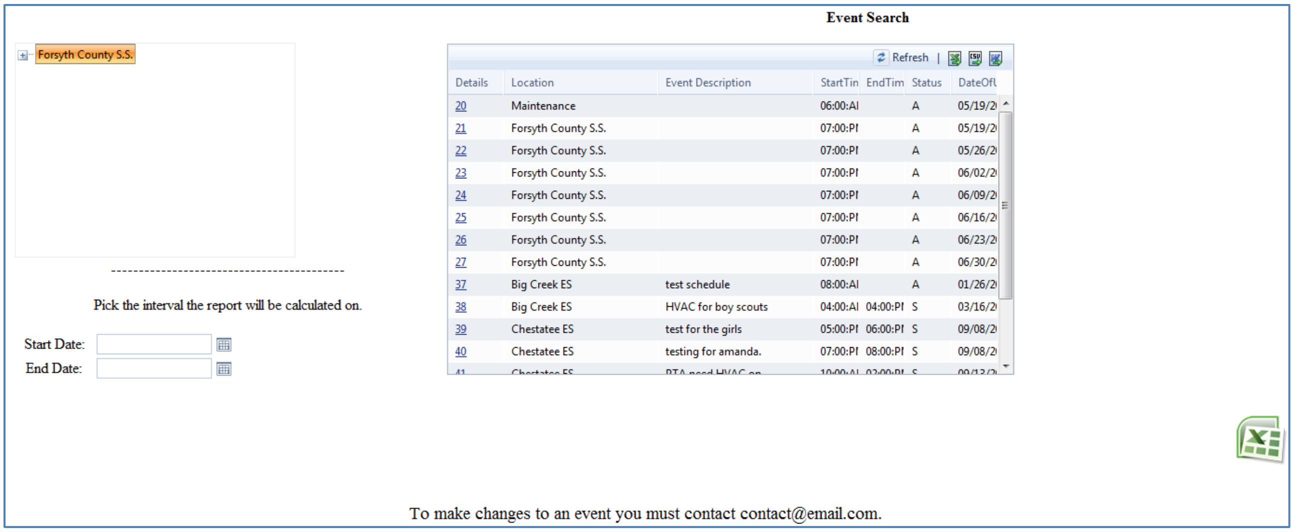
After clicking the **Save** button, a confirmation page will show with an assigned number for tracking purposes.

Thank You

Thank you for your event request. Your assigned request number is 43. Should you need to modify this request, please contact us at contact@email.com and reference your Request Number. Status of your request can be monitored by clicking the Event Search link and entering your Request ID.
Click Here to return to the Remote Request homepage. To reserve this event on another date, time or location please click here

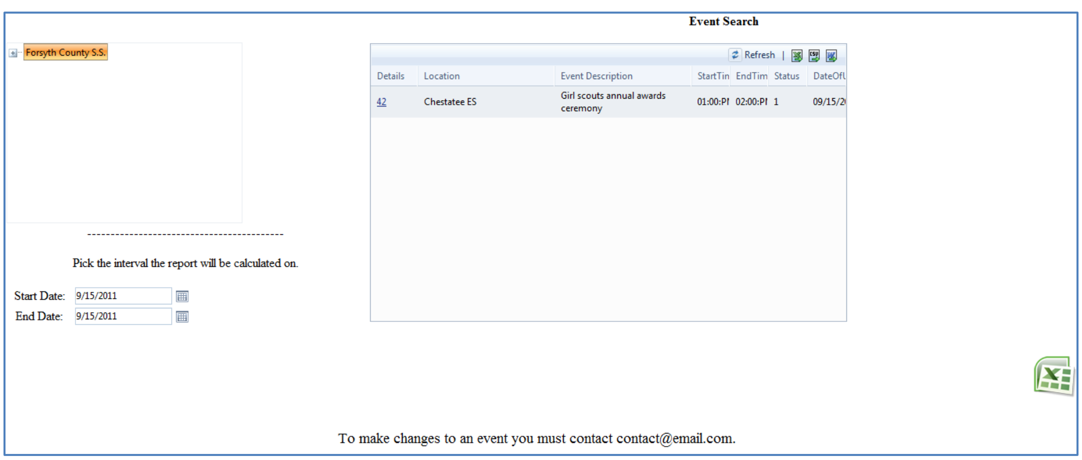
Event Search

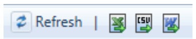
Searching for an event is very similar to requesting a location for an event. From the Main Menu Remote Request selection, click the **Event Search** option. This will yield the below screen.



Expand the Location to filter out even further. Enter a Date Range by entering a Start date and End Date to filter the grid further. Entering the same date in the Start and End Dates will filter all events scheduled on that given date. The results of the search are displayed in a grid as shown below.

NOTE: When Event Search is opened, it will default to the parent location with all event listed. Selecting a location will filter out all the events for that location. To specify specific dates you must enter the dates desired.





These options will Refresh the page, Export files to Excel or Word.

 icon located at the bottom right of the screen will allow you to Export to Excel.

NOTE: you must have Microsoft Excel installed on your local computer.

To view details of each request individually just click the **Request ID number.** This will yield an **Event Schedule Details Review** page with specific details of the event.

Event Schedule Details Review

ESID	42
Status	Rusty said
Location	Forsyth County S.S., Chestatee ES
Event Description	Girl scouts annual awards ceremony
Event Date	Sep 15, 2011
Start Time	01:00 PM
Endtime	02:00 PM
Expected Turnout	50
Requester	rusty
Date Submitted	9/13/2011 8:25:12 AM
Organization	Girl Scouts
Contact Person	Jane Doe
Phone Number	555-555-1234
Contact Email	me @me.com
rusty says	No
3	No
31	No
3	No
Reason Rejected	
Work Order ID	

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