5.0 Admin Guide

Remote Request – System Admin Guide

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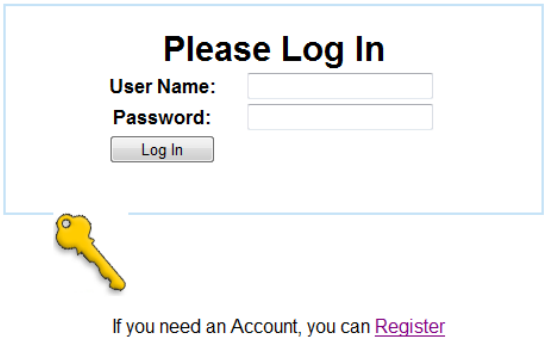
Remote Request – System Admin Guide

Configuring & Customizing your TeamWORKS Remote Request

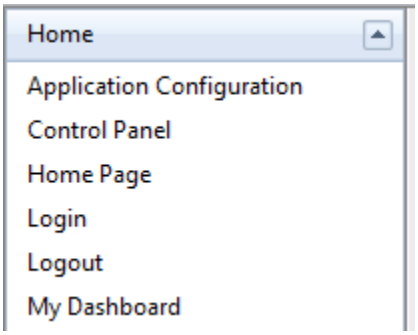
Note: This is a function of a user who has TeamWORKS System Admin privileges.

The TeamWORKS Remote Request is a web based Work Order, Inventory and Event Request system. There are some Administrative features that a designated TeamWORKS' Administrator will utilize to allow end users to "Submit" request.

Login to TeamWORKS WEB



After logging in you will notice under the HOME tab you have several options:



Application Configuration - This is where you are able to configure and customize your TeamWORKS

Control Panel - Allows you to add and edit users and groups (see WEB Control Panel documentation)

Home Page - Displays the home page of your Remote Request

Login- Login in to TeamWORKS Remote Request

Logout - Logout of TeamWORKS Remote Request

My Dashboard - Is a feature for each user to show their specific work areas.

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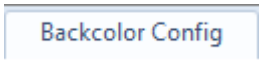
Application Configuration

Configuring options will allow you to set field requirements and default values for the remote request applications. Configuration can be accessed using the link under the Home menu. You **MUST** be a member of the ***SystemAdmin*** group in the WEB Control Panel in order to access the configuration page. Clicking on the Configuration tab will enable you to set configuration options for:

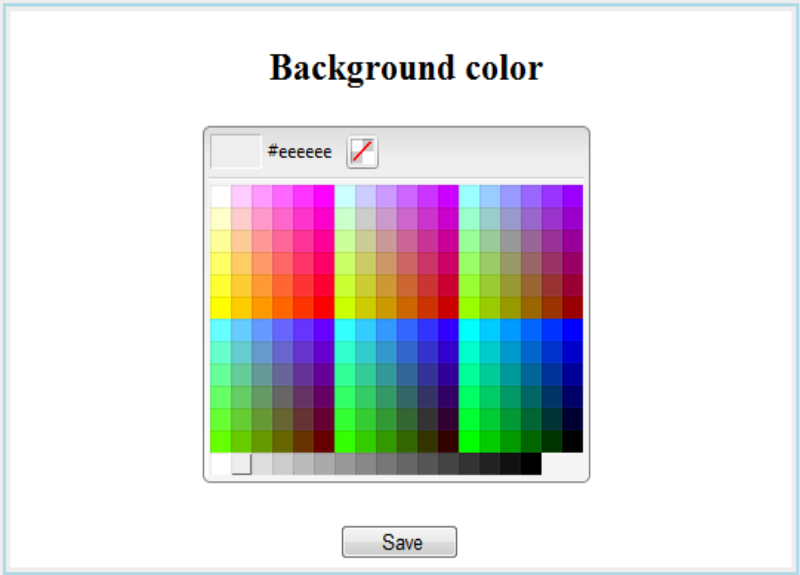
- Work Order Remote Request
- Inventory Remote Request
- Event Schedule Requests
- Event Schedule Groups
- Work Order Groups

Tabs at the top of the page indicate the options to set field requirements and default values.

Backcolor Config



Using the mouse, select a color you want as your background for your Remote Request application and click save. You will receive a confirmation message that your selection has been saved.



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Welcome Config

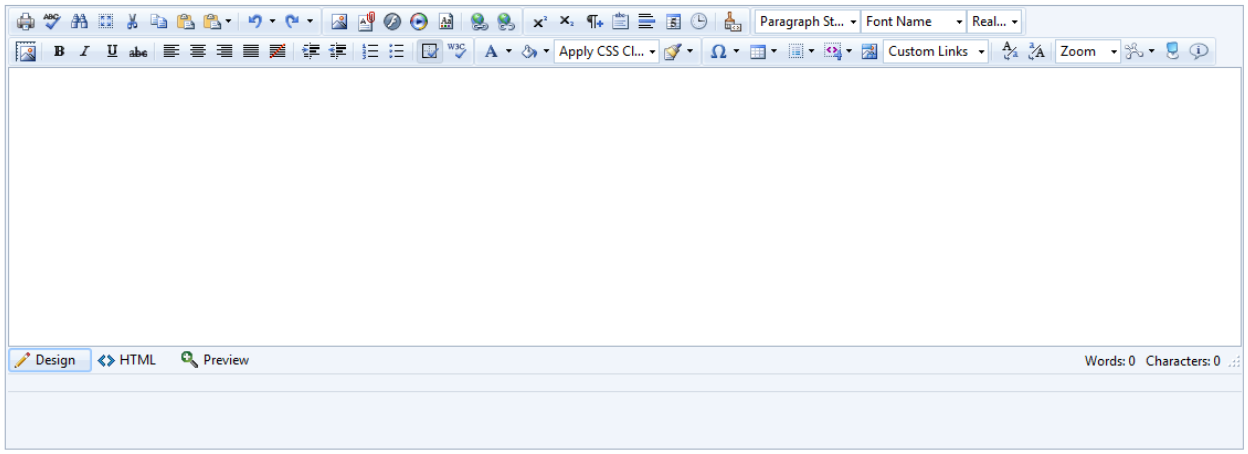
Welcome Config

This allows you to design your own TeamWORKS Remote Request Home Page.

The Editor allows users to use HTML coding if they are familiar with this or use the Design mode which is similar to most Microsoft® products features.

Whatever changes or creations are made just remember to click save to save your changes.

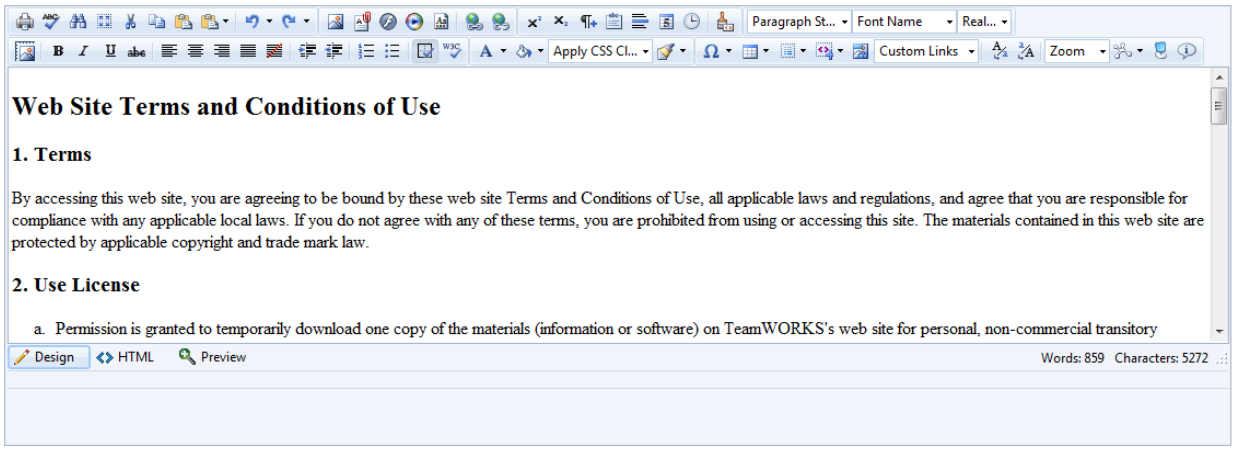
Home Page Configuration



This is also where you can setup the New User Registration Configuration option.

NOTE: See TeamWORKS New User Registration 4.0 Quick Guide for detailed instructions.

New User Registration Configuration



save

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W/O (Work Order) Config

W/O Config

This allows you to show or hide fields for the end user to enter the data.

Work Order Remote Request Application Settings

KEY
Value 1 = Visible but not Required
Value 2 = Visible and Required
Value 3 = Hidden

Defaults & Visiblility Settings

Work Order Submission Settings

Room Number	3	
Requested Completion Date	3	
Priority	3	Priority Settings
Department	3	Department Settings
Asset	3	
Budget Code	3	
Trade Code	1	
Contact	1	
Contact Email	1	
Mileage/Hours	3	
Project ID	3	
Purpose Code	3	
Requester same as Login?	☑	
Show only current users work orders?	☐	
Default Project ID Only is applied when project is blank.	GM	
Allow to submit for parent location?	no	

Work Order Review Settings

Transactions Totals	3
Enable Masked Budget Code	1

Save

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Work Order Remote Request Application Settings

KEY	Value 1 = Visible but not Required Value 2 = Visible and Required Value 3 = Hidden	Defaults & Visiblility Settings

- Keys:
  - Assigning a field with a Key value = 1 will make the field Visible on the data entry form, but not required.
  - Assigning a field with a Key Value = 2 will make the field Visible on the data entry form ***and*** make it a required field.
  - Assigning a field with a Key value = 3 will make the field not visible (hidden) on the data entry form.

Hint: remember allowing the users to enter more information can be useful but can also cause the data to be entered incorrectly. Most users will believe their request is always "Urgent" so in most cases less is sometimes best.

Room Number – if your paths structure is not broken down to the space (room) level, you can show this on the form, allowing the user to enter a room number for the work order request

Requested Completion Date – this field will show a calendar giving the user the ability to select a requested date for the work to be completed. Example: This can become useful to notify the maintenance staff that the work order needs to be completed prior to an upcoming event (specified by date selected)

Priority – this field allows the user to select a Priority for each request. Advanced priority settings will allow for a default priority and ability to show/hide specific priorities.

Department – this field will allow the user to select a specific department to assign the work order to. This will be useful for those customers who have a single database for Maintenance, Food Service and/or Technology. Advanced Department form will allow a default Department to be determined as well as ability to show/hide specific departments.

Asset – this field will show assets giving the user the ability to identify an asset tag number along with the work order request. The asset list will filter out based on the selected location of the work request.

Budget Code – this field will allow the user to select a specific budget from the Budget codes list that applies to this work request.

Trade Code – this field allows the user to select a specific trade for completing the work requested.

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Contact – this field allows the user to enter the name or phone of a primary contact for this work request. This can very useful if the worker assigned the work order has questions, the contact is printed on the work order.

Contact Email – this field allows the user to enter the email address of the primary contact for this work request.

Assigned To – this field allows the user to select who will be assigned the work order.

Mileage/Hours – this field will allow the user to enter a mileage/hours of usage. This is helpful if this work order is on an asset where the user wants to record the mileage or hours of usage for an asset at the time of breaking down.

Project ID – this field allows the user to select a specific project to tie this work order request to.

Purpose Code – this field allows the user to select a specific purpose (reason) for the work order request. This is a great way to track types of requests such as Vandalism, Food Service Requests and Athletic Requests.

Requester Same as Login? – check the box if you want the Requester field to default to the username. If left unchecked, the user will need to enter his manually.

Default Project ID Only if applied when project is blank – GM This allows you to select a Project ID for incoming work orders from the TeamWORKS Remote request.

Allow to submit for parent location? - this is a yes or no option, this allows a user to submit a work order from the parent location or not.

Transactions Totals – this field either shows or is hidden on the work order details page. This is a compilation of Labor and Materials totals, but does not give detail.

Enable Masked Budget - this allows for you to set a default budget code for incoming work orders.

Code – Default budget code for incoming work orders.

Save – click this button to submit (Save) your changes.

Priority Settings - Allows you to select a Default Priority and to show which priorities are available to the user.

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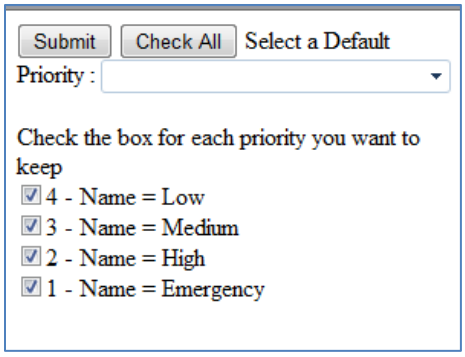
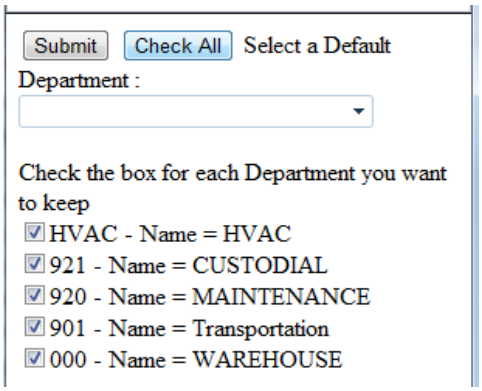


Department Settings - Allows you to select a default Department as well as to show which departments are available to the user.



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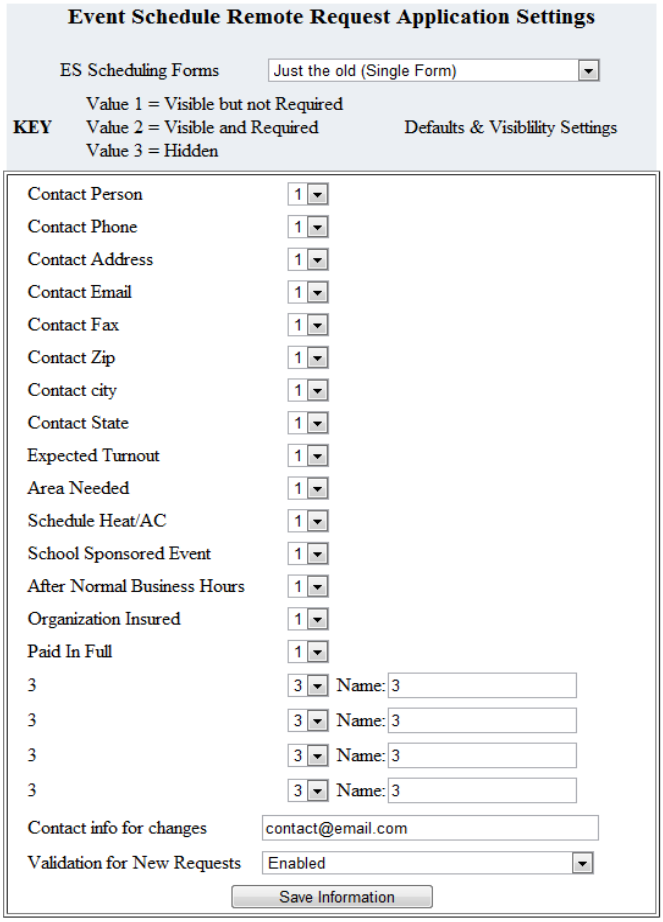
ES (Event Scheduling) Config

ES Config

This allows you to show or hide fields for the end user to enter the data.



- Keys:
  - Assigning a field with a Key value = 1 will make the field Visible on the data entry form, but not required.
  - Assigning a field with a Key Value = 2 will make the field Visible on the data entry form ***and*** make it a required field.

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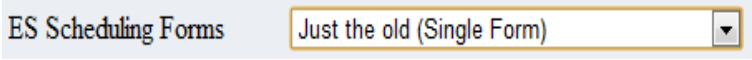
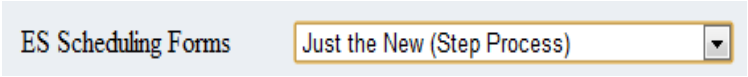
- Assigning a field with a Key value = 3 will make the field not visible (hidden) on the data entry form.

The ES Scheduling Forms option:

: shows the original and new forms



: shows the original form only



: shows the new form only

Contact Person – this field allows the user to enter the name of the primary contact when requesting an event location

Contact Phone – this field allows the user to enter a contact phone number when requesting an event location

Contact Address – this field allows the user to enter a contact address when requesting an event location

Contact Email – this field allows the user to enter a contact email address when requesting an event location

Contact Fax – this field allows the user to enter a contact fax number when requesting an event location

Contact Zip – this field allows the user to enter the contact zip code when requesting an event location

Contact City – this field allows the user to enter a city for the contact when requesting an event location

Contact State - this field allows the user to enter a state for the contact when requesting an event location

Expected Turnout - this field allows the user to enter the number of expected people for the event

Area Needed – this field is to specify a particular area needed for the event. (e.g. gymnasium, ball field, etc.)

Schedule Heat/AC - this field allows the user to enter if the facility will need conditioning such as heat or A/C

School Sponsored Event? – this field allows the user to enter if this event is School Sponsored.

After Normal Business Hours - this field allows the user to enter if this event will take place after normal business or school hours

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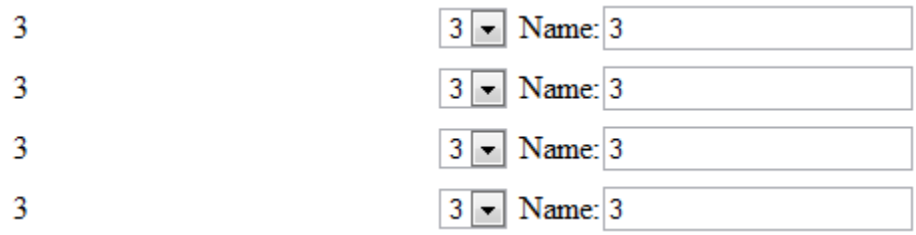
Organization Insured – this field allows the user to enter if the organization requesting the facility is insured

Paid In Full – this field allows the user to enter if the organization has paid for their facility rental in advance

Blank 1- 4 – The event scheduler does allow the administrator to enter some custom values.

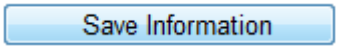


By typing in the Name box you have four additional values that can be shown for users to fill out.

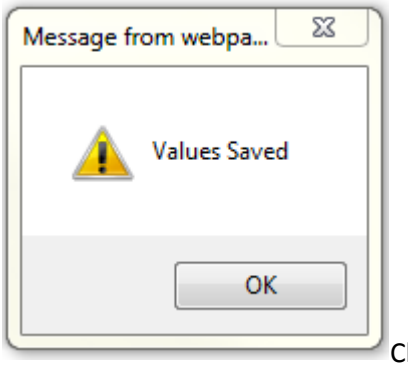
For example: life guard needed?

Contact information for changes: email address for point of contact (usually the person approving the events)

Validation for New request: select yes to not allow requests for previously submitted events or select no to allow requests even if that time and space has been allocated for another event.

Click 

and you will receive a confirmation message that the Values Saved.

. 

Click OK

Conditions of use for Event Schedule - This allows you to define conditions for use of Event Scheduler

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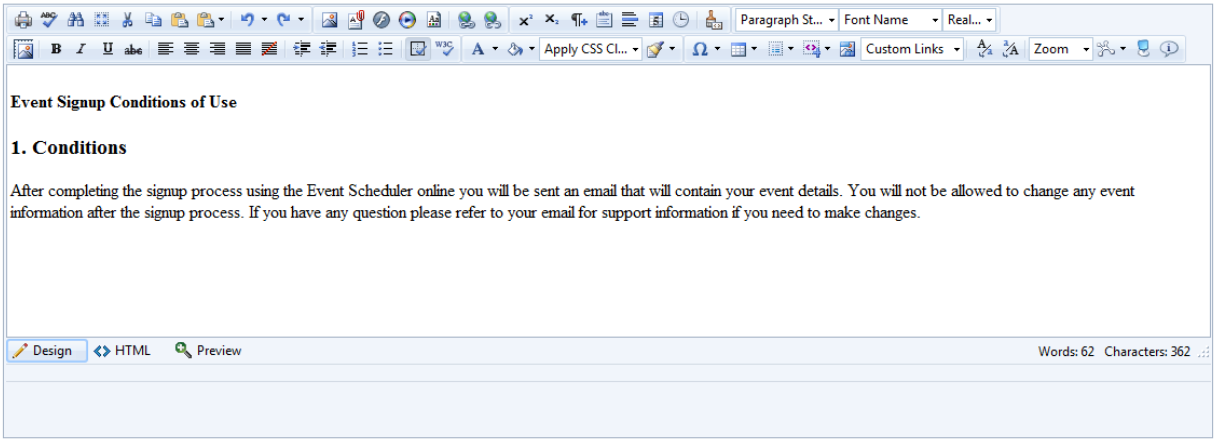
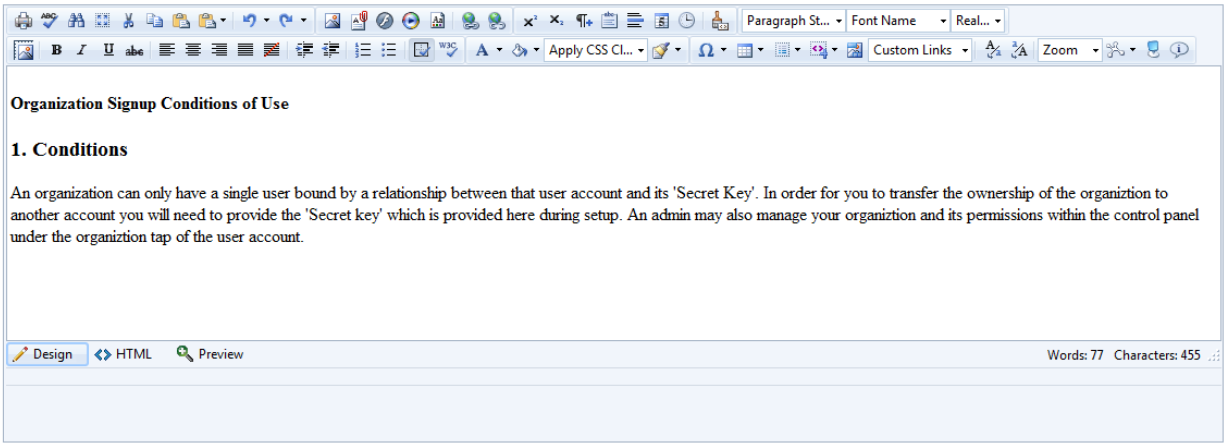
Conditions of use for Event Schedule



Conditions of use for Organizations - This allows you to define conditions for the Organizations:

Conditions of use for Organizations



Remember to click save located at the bottom of the page to save your work.

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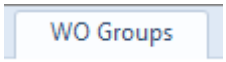
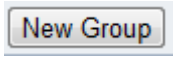
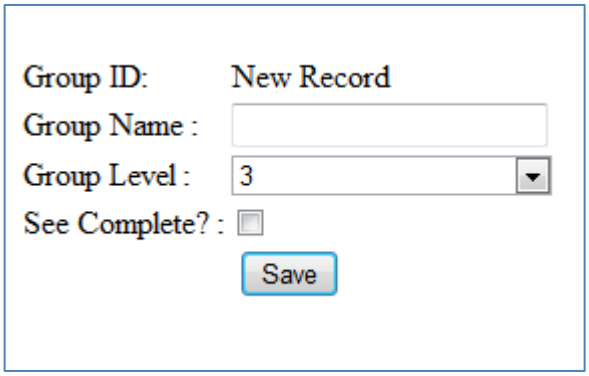
WO (Work Order) Groups



This allows you to setup groups for approving work orders

Click 

and the following box will appear:



Create the **Group Name** and select the **Group Level** up to nine levels and check the box **See Complete** if you wish this group to be able to change work orders to "Complete" status then click **Save.**

Note: See Levels of Approval 4.0 Quick Guide for detailed information regarding Work Order Groups.

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ES (Event Scheduling) Groups

ES Groups

Creating ES Groups creates levels of approvals for events. By creating levels of approval for event schedules, requests can be approved or rejected at any level. When you create a Group Name, a Group Level is also created automatically. This Group Level now becomes a Group in the TeamWORKS WEB Control Panel. You can now select users as part of this group.

Click New Group and the following box will appear:

Create the **Group Name** and select the **Group Level** up to nine levels. Click **Save**

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RR (Remote Request) Module Setup

RR Module Setup

This tab allows administrators to select the modules to be available. You turn the modules on or off here regardless if the user has permissions for that module. If it is turned off they will not be able to access the feature.

NOTE: the value will automatically update when you check or uncheck the box. Saving changes is not required.

Remote Request Module Application Setting

Values are automatically saved.

- [x] Workorders
- [x] Inventory
- [x] Event
- [ ] Bus

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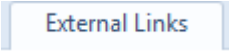
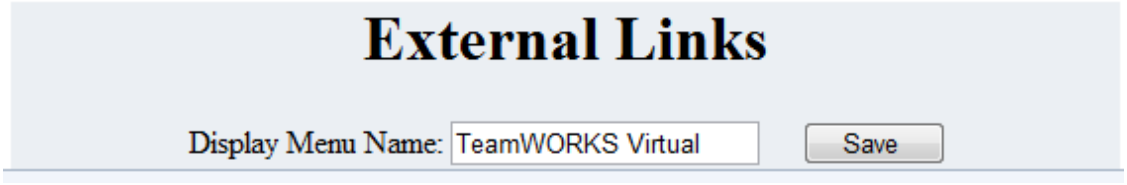
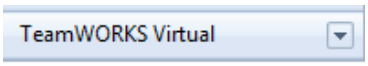
External Links



This feature enables administrators to create additional links that can be accessible to users from the TeamWORKS Main Menu.

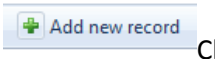
Type the name of the link to display in the Main Menu Name. Click Save



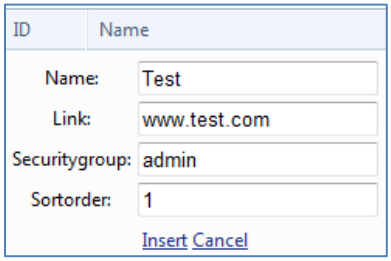


the results will show in the left pane of the main menu

<u>To Add a New Record</u>



Click to add a new record. This will yield the below screen



Name: enter the name of the link

Link: enter the URL

Securitygroup: enter the Security group which should see this. For example system admin

Sortorder: example 1,2,3 which order do you wish to view.

Click Insert

to save the record

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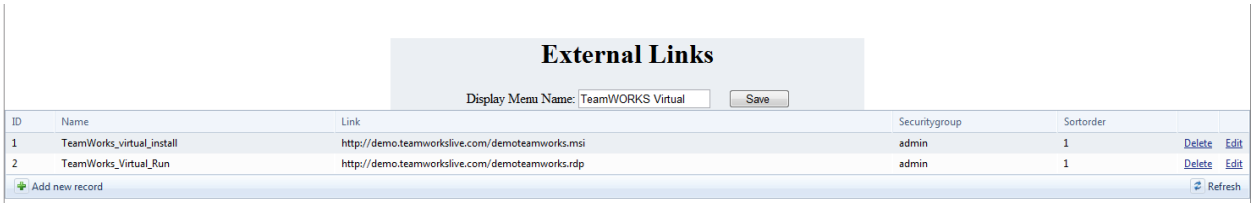
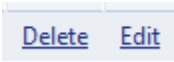
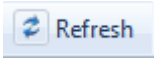


To delete or edit and existing link:



Delete will remove the link with no prompts. Edit will bring you back to the original form where you can Update or Cancel you edits.

Clicking 

at the bottom right portion of the form will refresh the web page to see any changes made.

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App (Application) Config

App Config

This form will allow you to turn on, off and set values to portions of the Remote Request.

Remember to click the Save button when done.

General Application Configuration

Work Order Description Character Limit	1000
Document Attach Module Web Apps	yes
Document Attach Module Remote Request	yes
Document Attach Path	C:\inetpub\Websites\RC\D
Email Configuration	Local
Allow Negative Inventory Balances	False
From for Email Trigger.	
Subject for Email Trigger.	
Work Order Printed Format	WOFormat 1
Use Trade Security?	Yes
Allow password reset.	Yes
Show My WorkOrders	Yes
Use Room Number	No
Allow user registration?	Yes
Email contact on new Organzations.	No
Login Page Message	Hello this is Peggy how may i help you.....Happy Times

Save

Work order Description Character Limit: this sets the maximum available characters users can enter in the description field.

Document Attach Module Web Apps: This is for the WEB Work Orders option if available. You turn it on or off.

Document Attach Module remote Request: this turns that feature on or off for users to attach documents to request.

Document Attach Path: path that is a central location for attached documents to be stored. This is ideally a network shared folder.

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Email Configuration: This allows for the use of a locally installed email application or the use of TeamWORKS Auto Emailer application.

Allow Negative Inventory Balances: Globally sets for all TeamWORKS applications where applicable to issue inventory out regardless if there are any on hand.

From for Email Trigger: the ***From*** address email you wish to have automatically set.

Subject for Email Trigger: to set the subject of the Email example "Work Order Request:"

Work Order Printed Format: This is for the Web Work order Option if available. Two options at this time Form 1 and Form 29 a predefined format for work orders to print out.

Use Trade Security: See Control Panel Documentation to understand Trade Security, this turns that feature on or off.

Allow Password Reset: this will allow end users to change their password. See user guide for re-setting password and profile.

Show My Work Orders: This will give the end user the option of seeing their work orders and to search for work orders. Turned off it goes straight to the work order search screen.

Use Room Number: this is a function of Web Work orders if applicable it turns the room number field on or off in the web work order form.

Allow user registration?: Turned on allows users to register and use the TeamWORKS remote Request application. Turned off users would have to have a predefined login to access TeamWORKS.

NOTE: see TeamWORKS New User Registration 4.0 Quick Guide to configure this option.

Email contact on new Organizations: turned on this will email the primary contact upon new organization setup.

Note: See Event Scheduling 4.0 User Guide for adding new organizations

Login Page Message: you can enter whatever message you wish on the TeamWORKS Login page.

Customer Support

Email: Support@goTeamWORKS.com

Telephone: Toll Free (866) 892-0034

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