Chapter

13

Admin Module

The Admin module is where certain customization, defaults and security can be setup, among other features. This Chapter describes how to use the Web Work, Admin module.

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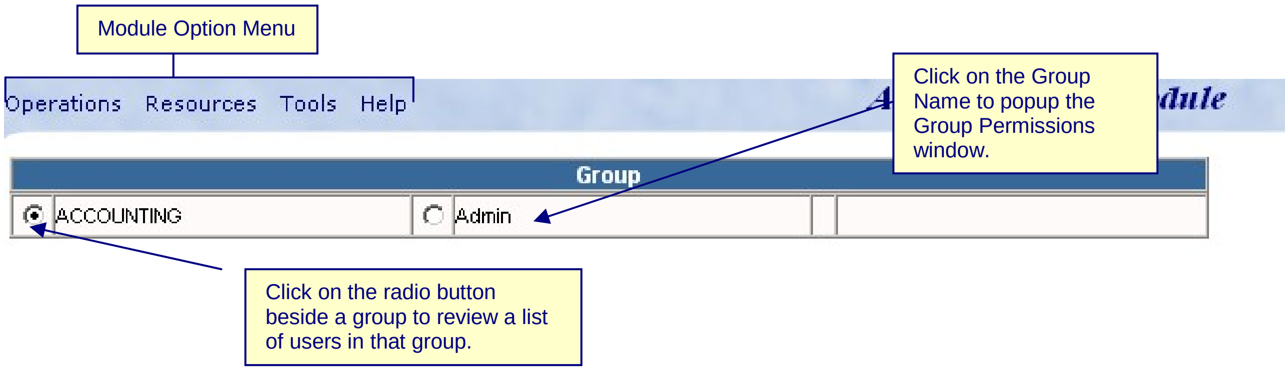
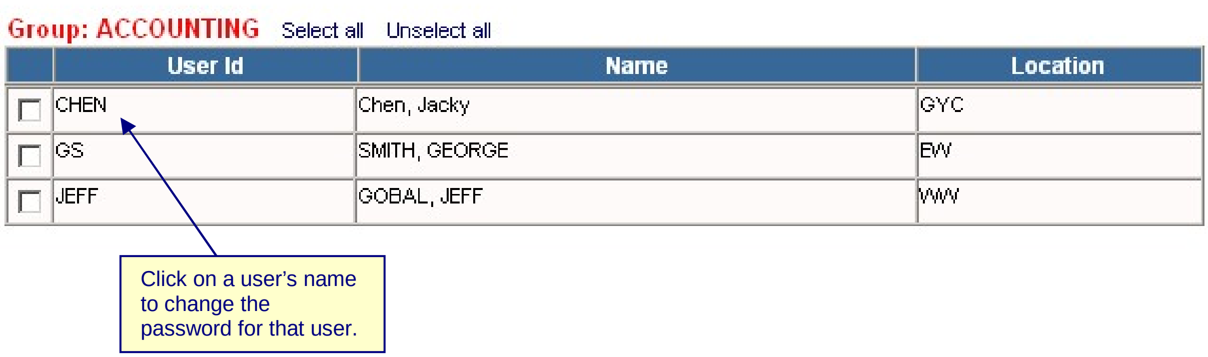
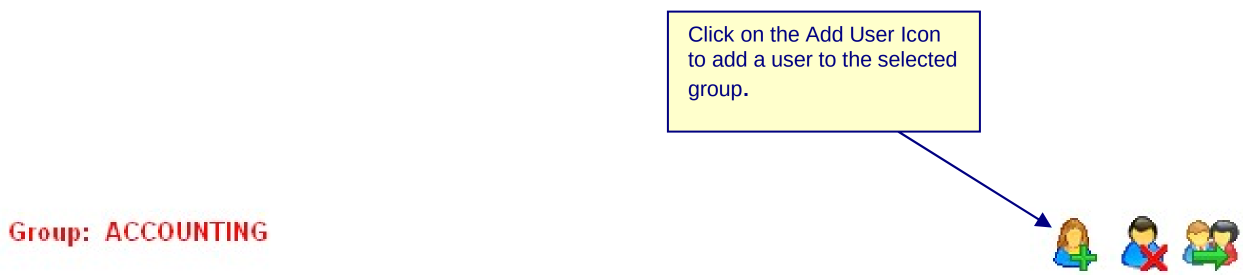
13.1 Overview of the Admin Module

The Admin module is used to setup system defaults, user and group settings, user permissions, auto-numbering formats, global codes, data divisions, field labels, and more.

Click on the Admin Module from the Side Bar Menu / Module Listing on the left hand side of the screen to access the Admin module. A screen similar to the one pictured below will open:





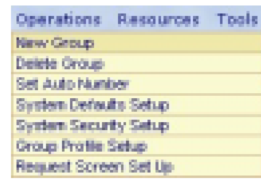


13.2 Setting Up User Groups

The Web Work system security is setup by Group and User level permissions. The GROUPS are setup to grant access to certain Web Work modules. For example the Purchasing Dept may only have access to the Purchasing module or the general population of your organization may only have access to the Work Requests module.

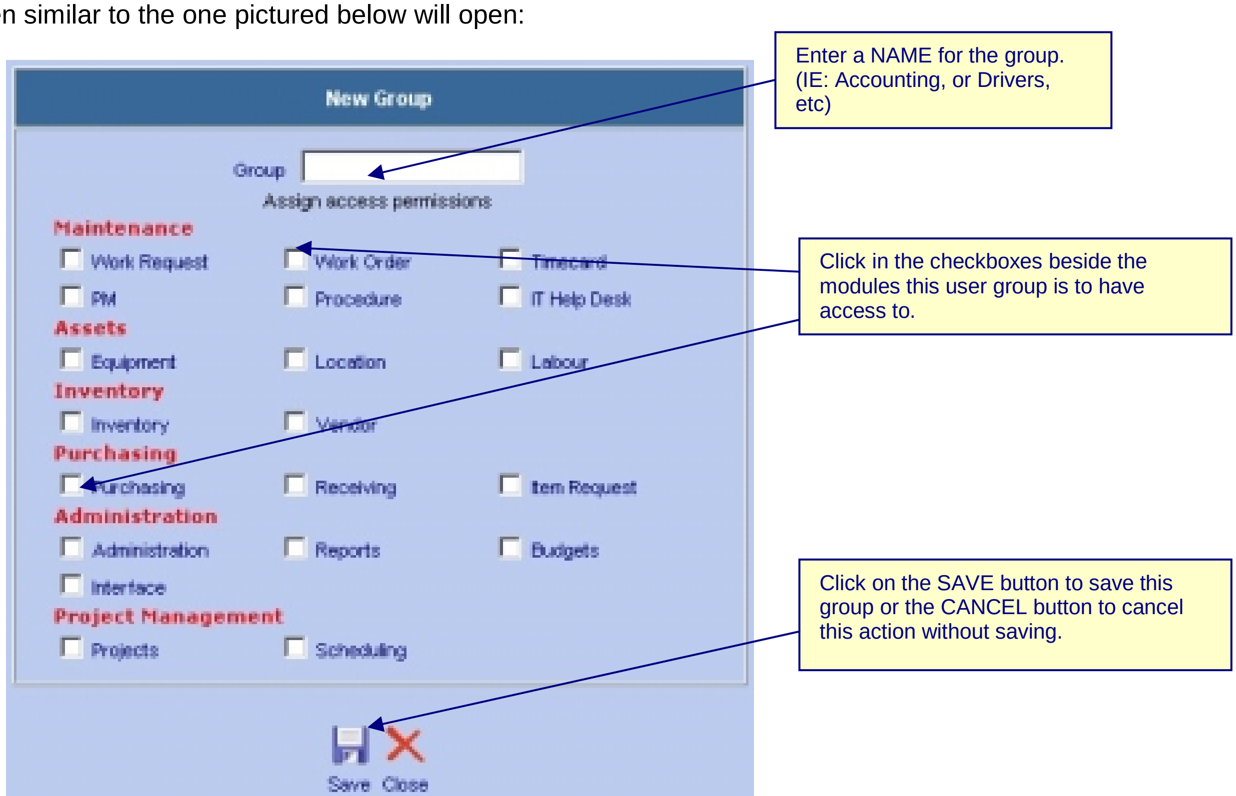
13.2.1 Adding a New Group

To add a new group (from the Main Admin Screen):



- Click on OPERATIONS from the Module Option Menu to display the list of options
- Select New Group from the drop down menu.

A screen similar to the one pictured below will open:

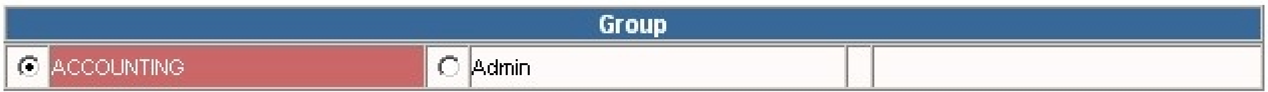


Group Setup grants permissions for the modules to ALL USERS in that group – HOWEVER, by default the users will have READ ONLY access only to the module. Permissions for Adding, Editing, Deleting, etc, is setup in User Permissions.

13.2.2 <u>Editing A Group</u>

To edit access level of an existing group (from the Main Admin Screen):

- Click on the name of the group you want to edit (see sample picture below):



- The Edit Group screen comes up. Change the group settings by clicking the  checkboxes beside the group names (see sample picture below):

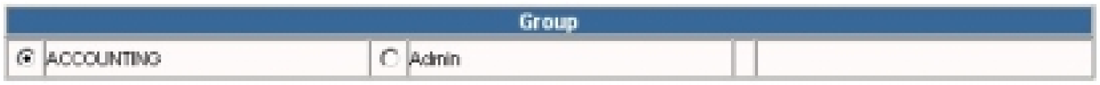
- Click on the  icon to save the group's new settings. All users belonging to this group will now access only the modules that were checked off.

The list of available modules will be limited only to the module your company has purchased. The list may not be exactly the same as the sample picture suggests! Contact your purchaser or Tero Consulting Ltd. directly for more information regarding this.

13.2.3 Deleting a Group

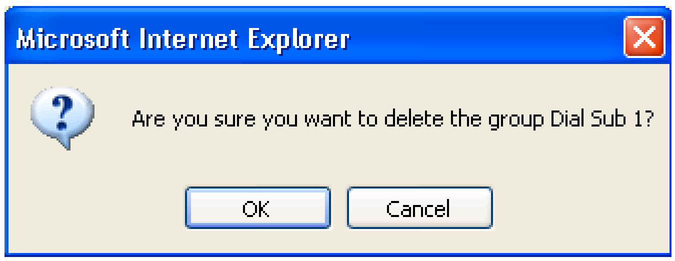
To delete a group (from the main Admin screen):

- Click on the RADIO button beside the Group you wish to delete.



- Click on OPERATIONS from the Module Option Menu at the top of the page to display the list of options.
- Select Delete Group from the drop down menu.

A screen similar to the one pictured below will open:



- To confirm this action, click on the OK button. Clicking on the CANCEL button will cancel this action.
- The selected group is deleted.

No user can be part of the group that is to be deleted. See section **Deleting User's from a Group** later on in this chapter.

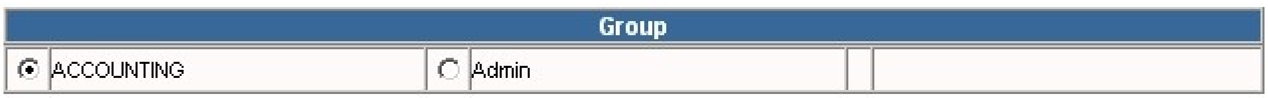
The Group Admin is a system group and cannot be deleted or modified.

13.2.4 Adding Users to Groups

Before new Users of the Web Work system can be setup, the users must exist in the Labour module. Only then can the administrator add these users to a group and allow them access to the system. See the Labour Chapter of this manual on how to add new Labour records.

After a group is created, individuals who share similar permissions can be added to a group, making them Users of Web Work.

- Click on the button beside the Group you wish to add an employee to. A table listing all users in this group will be displayed in the lower Frame of the screen.



- Click on the Add User icon at the bottom of the page to open the New User Window.

- Enter the user's id or click on the icon to select a user from the Web Work database.
- Create a temporary password for the user. This password can be changed by the user once the user logs in the first time.
- Click on the Save icon to make this user a member of the selected group.

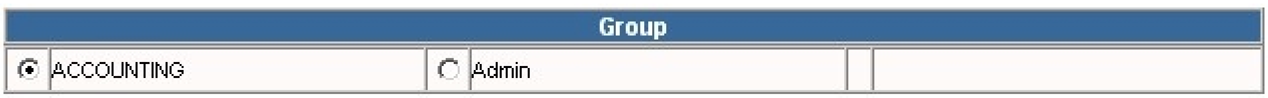
Each user can only belong to one group. If a user requires different rights than other members of their group, the user must be assigned to a different group or create a new group for this user.

13.2.5 <u>Moving User from one Group to another Group</u>

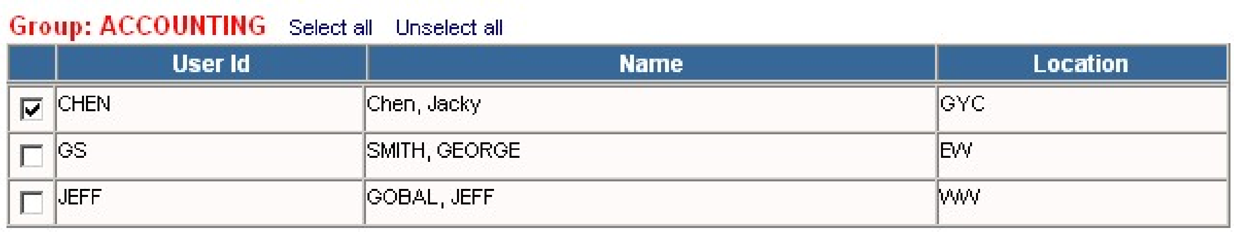
In a situation when a user needs access to modules other than his current group provides, the user may be moved to another existing, more suiting group without losing the user's password.

To move a user from current group to a different group:

- Click on the button beside the Group the user is currently a part of.

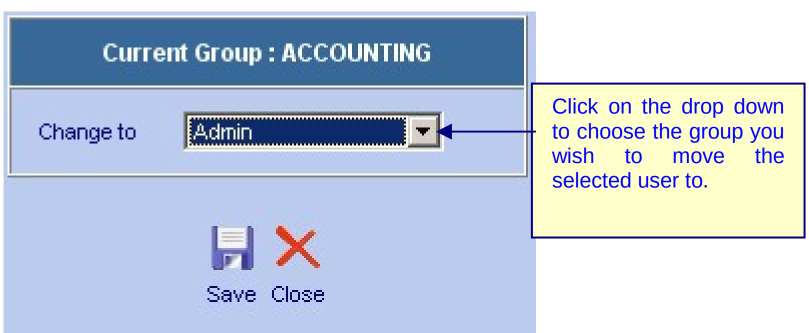


- Click in the checkbox beside the user you wish to move.



- Click on the change group icon located in the right bottom corner of the screen.

The Change Group screen will open as pictured below:



- Click on the save icon to update the changes. The user is now a member of the group, and can access modules matching the new Group's permissions.

13.2.6 Deleting User from a Group

By deleting a user from a group, the user loses the right to access the Web Work system. The user still remains as a Labour record so the user can be applied to work orders and such.

To delete a user from a group:

- Click on the RADIO button beside the Group the employee is part of.

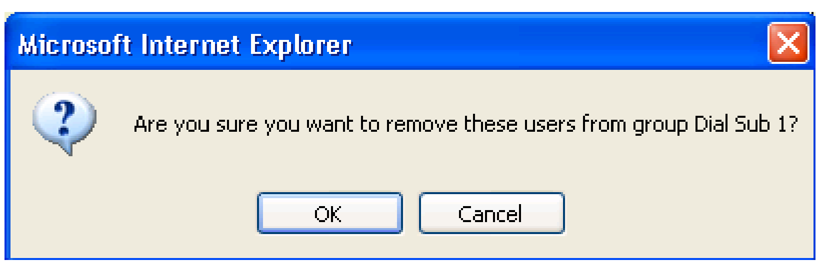
Group			
(•)	ACCOUNTING	( )	Admin

- Click in the checkbox beside the user you wish to delete from the group.

Group: ACCOUNTING Select all Unselect all

	User Id	Name	Location
[x]	CHEN	Chen, Jacky	GYC
[ ]	GS	SMITH, GEORGE	EW
[ ]	JEFF	GOBAL, JEFF	WW

- Click on the remove user icon at the bottom of the screen. A message box confirming you want to delete this user from the group will be displayed (see sample picture below).



- Click on the OK button to continue or the CANCEL button to stop the action.

Deleting users from a group removes them from the group they are assigned to and prohibits them from entering the Web Work system until they are assigned to a new group. Their labour record remains intact. All labour history through work orders and other transactions in Web Work also remain unchanged. To delete their labour record see the Labour module section of this manual.

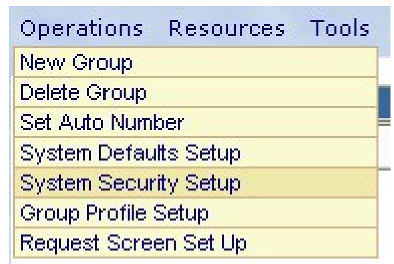
13.3 System Security Setup (User Permissions)

First make sure the users are setup – refer to section Setting Up User Groups. Once users are added to a group, permissions within that group need to be set up. Use Web Work's System Security Setup feature to assign a user specific permissions within the modules they have access to.

Access to modules is done by setting up Groups as explained earlier on in this manual. See section called **Setting up User Groups** for more information.

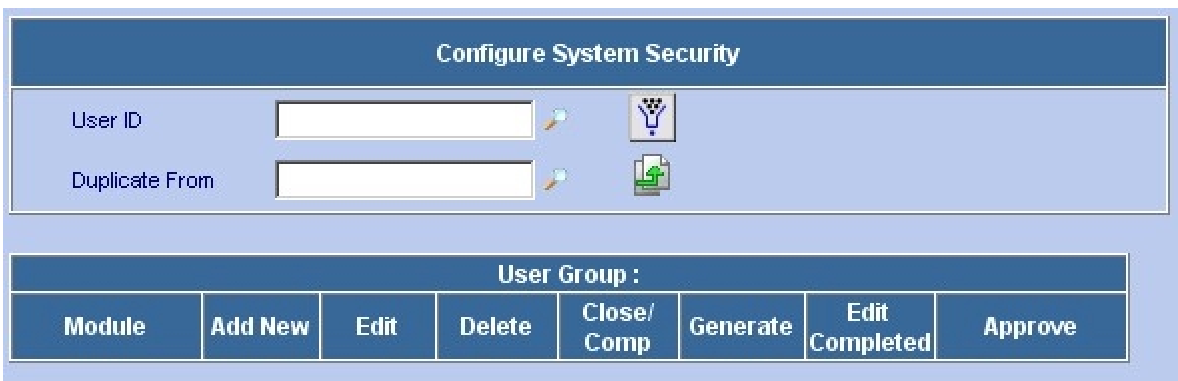
13.3.1 Setting up User Permissions

Once user has access to modules, by default the user has read-only right for each of the modules. To grant the user more access, User permissions must be setup.

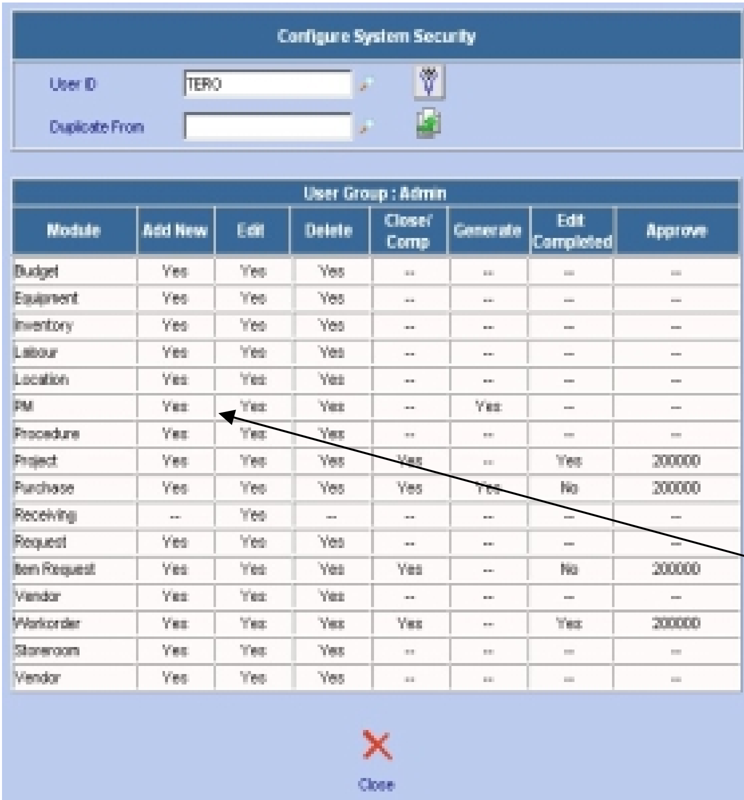


To Set Up User Permissions (from the main Admin screen):

- Click on OPERATIONS in the Module Option menu and select System Security Setup from the drop-down list.
- The System Security Setup Screen will open as pictured below:



- Enter User ID into the User ID Field or click on the button to select a user from a list.
- Click on the button to display the current permissions for this user. The User Security Setup screen will show privileges for each module (see sample picture).



Configure System Security

User ID: TERO

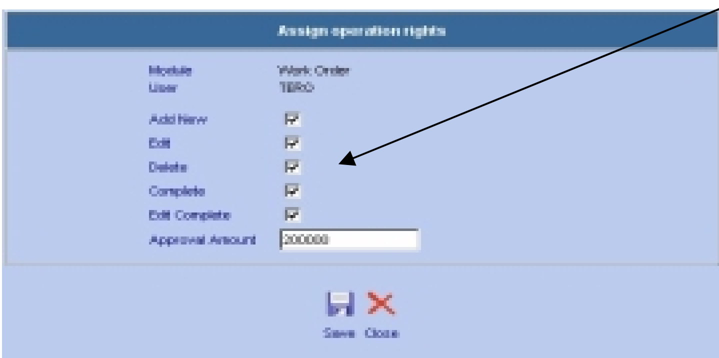
Duplicate From:

User Group : Admin							
Module	Add New	Edit	Delete	Close/ Comp	Generate	Edit Completed	Approve
Budget	Yes	Yes	Yes	--	--	--	--
Equipment	Yes	Yes	Yes	--	--	--	--
Inventory	Yes	Yes	Yes	--	--	--	--
Labour	Yes	Yes	Yes	--	--	--	--
Location	Yes	Yes	Yes	--	--	--	--
PM	Yes	Yes	Yes	--	Yes	--	--
Procedure	Yes	Yes	Yes	--	--	--	--
Project	Yes	Yes	Yes	Yes	--	Yes	200000
Purchase	Yes	Yes	Yes	Yes	Yes	No	200000
Receiving	--	Yes	--	--	--	--	--
Request	Yes	Yes	Yes	--	--	--	--
Item Request	Yes	Yes	Yes	Yes	--	No	200000
Vendor	Yes	Yes	Yes	--	--	--	--
Workorder	Yes	Yes	Yes	Yes	--	Yes	200000
Storeroom	Yes	Yes	Yes	--	--	--	--
Vendor	Yes	Yes	Yes	--	--	--	--

Close

This particular user has access to all modules. Your screen will change depending on the User Group.

Click on each line to assign individual rights for each of the modules.



- Set the permissions within the selected module by checking the box beside each item.

- Work order and Purchase order modules also have an Approval Amount field – enter the maximum approval amount for this user in your home currency units.

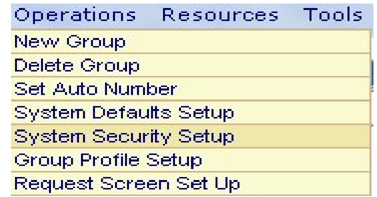
- Click on save icon to save these permissions and return to the main User Security Setup screen. You will note any changes you made will be updated in the table shown on this screen.

- Click on another module name to continue updating permissions or on the CLOSE icon to close the User Security Setup screen.

User permissions are being changed only for this user NOT for all users in the Group. To setup all users in the same group with the same permissions use Web Work's Duplicate From feature as explained further on in this manual.

13.3.2 Editing User Permissions

To edit User Permissions (from the main Admin screen):

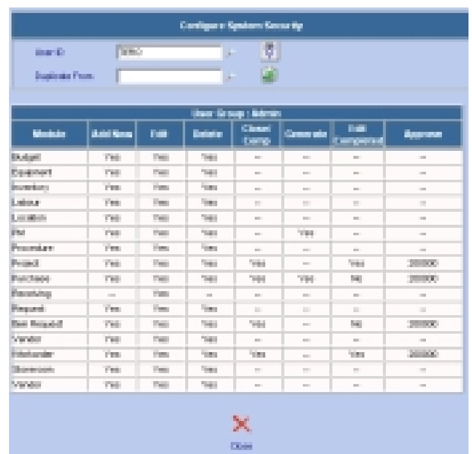


- Click on OPERATIONS from the Module Option Menu at the top of the Admin Screen to display the drop down menu.

- Select System Security Setup from the drop down menu.

- Enter a User ID into the User ID field or click on the button to select a user from the Web Work database.

- Click on the  button to display the current permissions for this user.



- Click on the name of the Module that you wish to edit the permissions for.

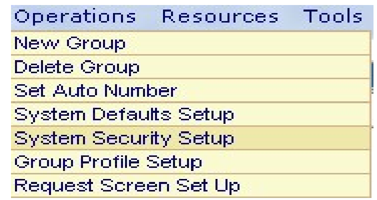
- Check or uncheck the different rights for the module

- Click on the  save icon to save these permissions and return to the main User Security Setup screen.

Once the User permissions are changed, the user must log out of the Web Work system and log back in for the changes to take place.

13.3.3 Duplicating User Permissions

The Web Work Duplicate User is used rather than having to re-enter the user permission details for employees who will have exactly the same permissions.



- To edit User Permissions (from the main Admin screen):
- Click on OPERATIONS on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select System Security Setup from the drop down menu.
- Enter a User ID into the User ID field or click on the button to select a user from the Web Work database. This is the user whose permissions will be updated. (USERID: NEWUSER)
- Enter a User ID into the Duplicate From field or click on the button to select a user from the Web Work database. This is the user whose permissions will be copied onto the user specified in the User ID field.

(USERID: TERO)

- Click on the  Duplicate Security Permissions icon. A message window will open confirming you wish to copy the permissions from one User ID to the other. To confirm the action, click on the OK button or cancel the action by clicking on the CANCEL button.

The User System Security Setup screen will now display the updated permissions for the user you selected.

NOTE: Permissions will only be duplicated for modules the users have access to. If one user has access to modules that the other does not, permissions will not be duplicated for those modules.

13.4 Changing a User's Password

A user's password can be changed in any module by the user or in the Admin module by the administrator.

To change a password (from the main Admin screen):

- Click on the radio button beside the Group the user is part of. A list of users lists in the bottom frame.
- Click on the applicable user's ID or name to open the Change Password screen, as pictured below.

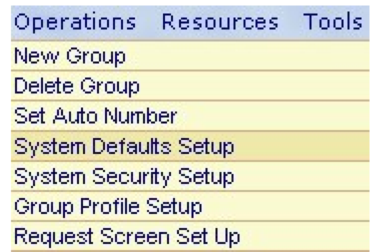
- Enter a new password for the user into the Password field. Retype the same password into the Confirm Password field.
- To save the new password, click on the save icon. To exit the Change Password screen without updating the password, click on the close icon.

Each user may modify their own password upon logging into Web Work. To do so, load any module and click on HELP from the Module Option Menu at the top of the page, and selecting User Settings/*Change Password*.

13.5 Setting Up Web Work System Defaults

The system defaults are settings that you can customize so that the Web Work system matches yours and your organizations requirements and expectations.

13.5.1 Accessing the System Defaults Setup



- From the main Admin screen, click on OPERATIONS on the Module Options Menu at the top of the page.
- Select System Defaults Setup from the drop down menu.
- The System Default screen will open.

Whenever you change a system default, you must click on the button to update the default, then close the system default window and then you have to log off and log back into the program to refresh the system.

13.5.2 Work Request – System Defaults

The screen pictured below shows the defaults, which can be setup for the Web Work - Work Request module.

Show Location on Request

YES:	If set to YES – the location field is defaulted to the location entered on the requester's labour record but can be changed.
NO:	If set to NO – the location field is defaulted to NULL and the location can be queried and changed as required.
FORCE:	If set to FORCE – the location field is defaulted to the location entered on the requester's labour record and cannot be changed.

Show Remarks on Request

YES:	If set to YES – the requester can view the workorder completion remarks from the Work Request screen.
NO:	If set to NO – the completion remarks cannot be viewed from the Work Request screen.

<u>View Other's Requests</u>

YES: Requesters can view other requestor's requests
NO: Requesters cannot view each other's requests

<u>Requesters Can Change Password</u>

YES: Requesters can change their password
NO: Requesters cannot change their password

13.5.3 Work Order - System Defaults

The screen pictured below shows the defaults, which can be set up for the Web Work - Work Orders module.

Default WO Priority

The Priority specified will default to every new work order at the time of creation. Any of the priorities contained in the Web Work database can be chosen. Click on the button to display this list.

Default WO Type

The Work Order type specified will default to every new work order at the time of creation. Any of the WO types contained in the Web Work database can be chosen. Click on the button to display this list.

Use Auto-Number on New Work Order Record

YES:	The NEW button will auto-number the new record.
NO:	The NEW button will leave the code field blank for manual input.

Include Tax when Issuing Inventory to Work Orders

YES:	Default Tax amount is being charged to each work order material line
NO:	Default Tax amount is not being charged to each work order material line

Use GL on Work Orders for Resource Expenses

Yes:	GL account code is taken from the work order main screen and is copied into each Work Order labour line account field.
No:	GL Account on new Work Order labour line is defaulted to NULL.

Use Employee on Work Order for Labour Resources

YES:	Employee code is taken from the work order main screen and is copied into each Work Order labour line employee field.
NO:	Work Order labour line employee field is defaulted to NULL.

Additional Material Cost on Work Order (percent)

Enter the percentage rate for any additional material costs that will be automatically applied to each Work Order Material line, or leave it as zero for no additional costs.

Additional Labour Cost on Work Order (percent)

Enter the percentage rate for any additional labour costs that will be automatically applied to each Work Order labour line, or leave it as zero for no additional costs.

Auto Approve Work Orders

YES:	All new work orders will be automatically approved when saved.
NO:	All new work orders must be approved by user.

Auto Reserve Materials

YES:	Workorder Material estimates will be reserved when workorder is approved.
NO:	Workorder Material estimates will NOT be reserved.

Sort Work Orders in Numeric Order

YES: When you press Lookup button, the results are sorted numerically by the Work order number.
NO: When you press Lookup button, the results are sorted alpha-numerically by the Work Order number.

Issue Inventory Items

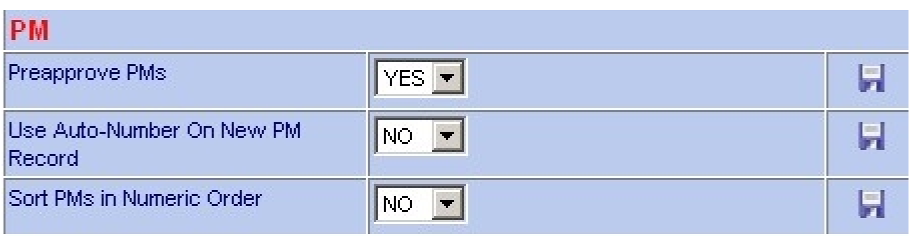
YES: Inventory can be issued to workorders via the Workorder materials screen.
NO: Inventory can only be issued to workorders through the Inventory modules.

Chargeback Labour Expense, Chargeback Material Expense, Chargeback Tool Expense

YES: will 'rollup' actuals on labour, materials and tools and populate the chargeback amount field.
NO: will not rollup actuals, and any chargeback amount will be entered manually.

13.5.4 PM - System Defaults

The screen pictured below shows the defaults, which can be setup for the Web Work PMs module.



Pre-Approve PMs

YES: All newly generated PM work orders will have a status of Approved.
NO: All newly generated PM work orders will have a status of Waiting for Approval.

Use Auto-Number on New PM Record

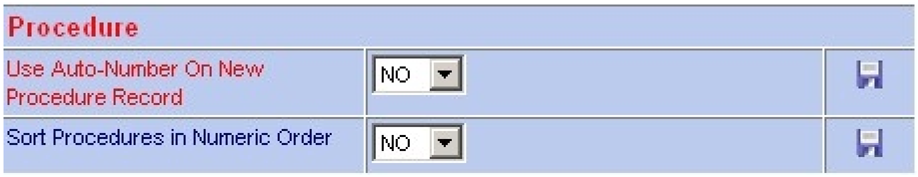
YES: The NEW button will auto-number the new record.
NO: The NEW button will leave the code field blank for manual input.

Sort PMs in Numeric Order

YES: When you press Lookup button, the results are sorted numerically by the PM number.
NO: When you press Lookup button, the results are sorted alpha-numerically by the PM number.

13.5.5 Procedure - System Defaults

The screen pictured below shows the defaults, which can be setup for the Web Work Procedures module.



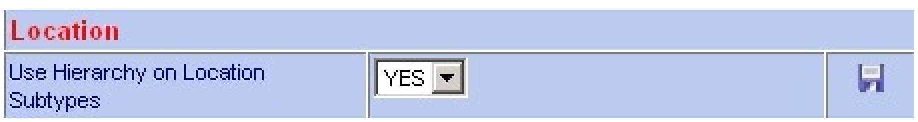
Use Auto-Number on New Procedure

YES: The NEW button will auto-number the new record.
NO: The NEW button will leave the code field blank for manual input.

Sort Procedures in Numeric Order

YES: When you press Lookup button, the results are sorted numerically by the Procedure number.
NO: When you press Lookup button, the results are sorted alpha-numerically by the Procedure number.

13.5.6 Location - System Defaults

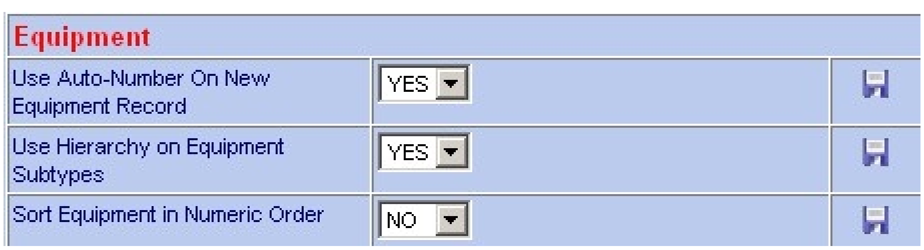


Use Hierarchy on Location Subtypes

YES: Equipment subtypes will use parent child relationships, creating hierarchy tree.
NO: Equipment subtypes will not use parent child relationships; each list will show all codes.

13.5.7 Equipment - System Defaults

The screen pictured below shows the defaults, which can be set up for the Web Work Equipment module.



Use Auto-Number on New Equipment Record

YES: The NEW button will auto-number the new record.
NO: The NEW button will leave the code field blank for manual input.

Use Hierarchy on Equipment Subtypes

YES: Location subtypes will use parent child relationships, creating hierarchy tree.
NO: Location subtypes will not use parent child relationships; each list will show all codes.

Sort Equipment in Numeric Order

YES: When you press Lookup button, the results are sorted numerically by the Equipment number.
NO: When you press Lookup button, the results are sorted alpha-numerically by the Equipment number.

13.5.8 Inventory Issue - System Defaults

The screen pictured below shows the defaults, which can be set up for the Web Work Inventory module.

Inventory Issue Price

Average: Inventory issue price will be set at the Average price.
Last: Inventory issue price will be set at the Last price.
Quoted: Inventory issue price will be set at the Quoted price.

Inventory Purchase Price

Average: Inventory purchase price will be set at the Average price.
Last: Inventory purchase price will be set at the Last price.

Inventory Reorder Method

EOQ: Inventory will be reordered based on Economic Order Quantity.
MIN/MAX: If Inventory will be reordered based on Min/Max stock levels.

Issue Reserved Items Only

YES: Only items that were reserved (through work orders or other) may be issued out.
NO: Items may be issued out regardless if they were reserved or not.

Default Storeroom

Enter the default storeroom – click on the lookup icon to choose a storeroom from the list contained in the Web Work database. Most screens in Web Work will default to the storeroom selected but may be changed manually.

Use Auto-Number on New inventory Item

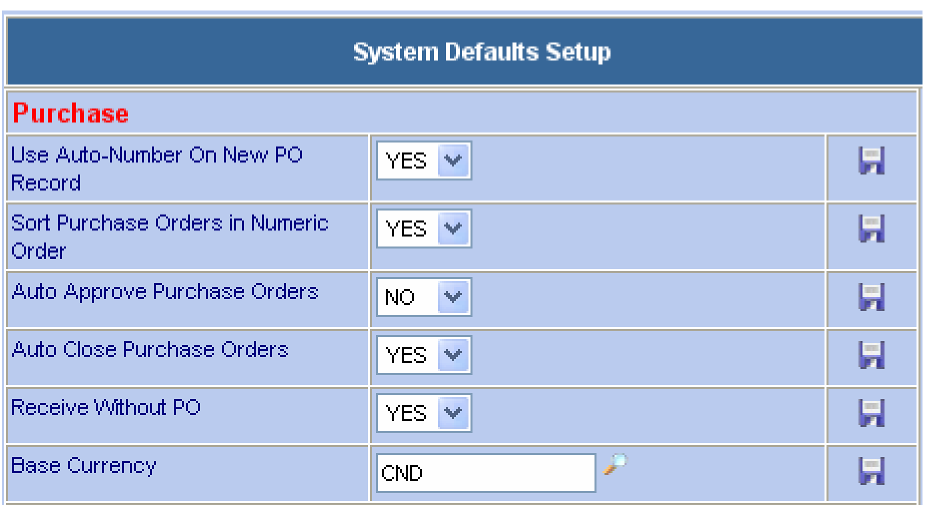
YES: The NEW button will auto-number the new record.
NO: The NEW button will leave the code field blank for manual input.

Sort Items in Numeric Order

YES: When you press Lookup button, the results are sorted numerically by the Item number.
NO: When you press Lookup button, the results are sorted alpha-numerically by the Item number.

13.5.9 Purchasing - System Defaults

The screen pictured below shows the defaults, which can be setup for the Web Work Purchasing module:



Use Auto-Number On New PO Record

YES: The NEW button will auto-number the new record.
NO: The NEW button will leave the code field blank for manual input.

Sort Purchase Orders in Numeric Order

YES: When you press Lookup button, the results are sorted numerically by the Item number.
NO: When you press Lookup button, the results are sorted alpha-numerically by the Item number.

Auto Approve Purchase Orders

YES: All new purchase orders will be automatically approved when created.
NO: All new purchase orders must be approved in the Purchasing module.

Auto Close Purchase Orders

YES: When all items listed on the Purchase Order are received, Web Work will automatically change the status of the PO record to Close.
NO: The status of the Purchase Order must be *manually* changed to *Close* even if all items were already received.

Receive Without PO

YES: Enables the Receive icon on the PO Line Items screen so the user can receive an Item directly without having to create, save and Approve a PO first. The PO approval amount for the user is still enforced.
NO: Disables and removes the Receive icon on the PO Line Items screen.

Base Currency

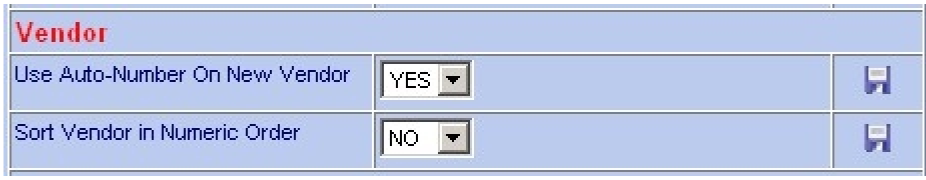
Enter the Currency code that refers to the currency you want all other currencies converted to. This is the currency that your company uses to report accounting information on a corporate basis.

- The first time you access this screen you will have no currencies as shown here.
- Click the  new icon to enter a Currency

- Enter a Code and Description as shown here and click the  save icon to save the record. You can repeat the last step to enter other currency codes now or you can enter them later when you setup your exchange rates.

13.5.10 <u>Vendor - System Defaults</u>

The screen pictured below shows the defaults, which can be setup for the Web Work Vendor module:



<u>Use Auto-Number On New Vendor</u>

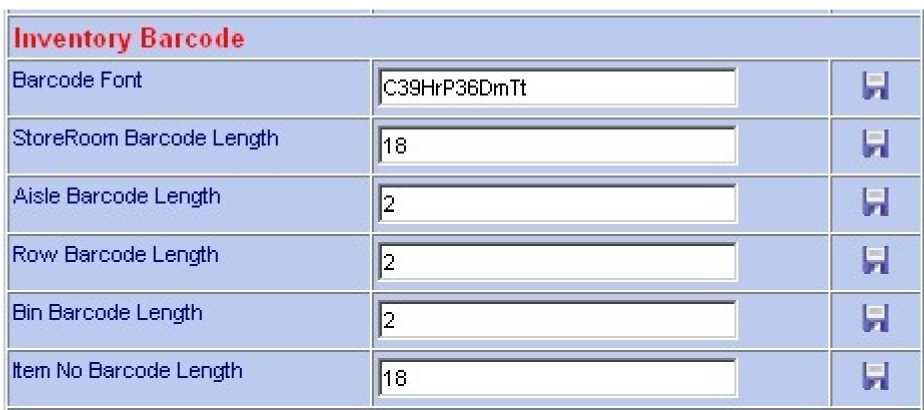
YES: The NEW button will auto-number the new record.
NO: The NEW button will leave the code field blank for manual input.

<u>Sort Vendor in Numeric Order</u>

YES: When you press Lookup button, the results are sorted numerically by the Vendor ID.
NO: When you press Lookup button, the results are sorted alpha-numerically by the Vendor ID.

13.5.11 <u>Inventory Barcode - System Defaults</u>

The screen pictured below shows the defaults, which can be setup for the Web Work Print Barcode screen which is a part of the Inventory module (refer to the Inventory section of the manual – Print Barcode):



<u>Barcode Font</u>

Specify a barcode font name that will be used for printing the inventory barcodes on the Print Barcode report. The font needs to be installed on the client computer.

<u>Storeroom Barcode Length</u>

Specify a maximum number of characters the Storeroom code may have.

<u>Aisle barcode Length</u>

Specify a maximum number of characters the Aisle code may have.

Row barcode Length

Specify a maximum number of characters the Row code may have.

Bin barcode Length

Specify a maximum number of characters the Bin code may have.

Item No Barcode Length

Specify a maximum number of characters the Item Number code may have.

13.5.12 Item Request - System Defaults

The screen pictured below shows the defaults, which can be setup for the Web Work Item Request module:

Sort Item Request in Numeric Order

- YES: When you press Lookup button, the results are sorted numerically by the Item Request Number.
- NO: When you press Lookup button, the results are sorted alpha-numerically by the Item Request Number.

13.5.13 Labour - System Defaults

The screen pictured below shows the defaults, which can be setup for the Web Work Labour module.

Use Data Division on Labour

- YES: Only labour records in your own data division can be seen.
- NO: All labour records can be seen by all Web Work users, regardless of assigned data divisions.

13.5.14 System - System Defaults

The screen pictured below shows the defaults, which can be setup for Web Work in general. These options are mostly global settings relating to most modules at the same time.

Tax 1 Rate

Setup the tax rate for tax1.

Tax 2 Rate

Setup the tax rate for tax2.

Decimal Place on Labour Cost

Setup the number of decimal places on labour costs.

Decimal Place on Material Cost

Setup the number of decimal places on material costs.

Session Timeout

Enter how many minutes User will remain logged into Web Work since the user last accessed data from the Web Work database (idle time).

Data Division Separator

ON: Data Division is in effect, certain data can be viewed only by users of the same data division.
OFF: Data division is not in effect; all data can be viewed by any user.

Email Server

Enter the address of the email server to be used for e-mailing records via Web Work. (i.e.: mail.teroconsulting.com (use your company server names))

Company Email

If using auto-email notification option, specify the company default email. (i.e.: support@tero.ca (use your company e-mail address))

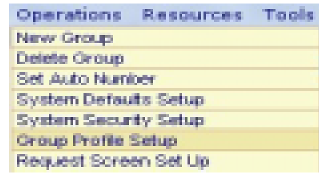
Link Document URL

Enter the URL for Linked Documents. The link will specify where the link documents are stored. (i.e.: "http://servername/pictures"). If this field is left blank, the default storage place is within the WebWork/linkdata directory.

Whenever you change a system default, you must click on the button to update the default, and then close the system default window and log off and then log back into the program to refresh the system.

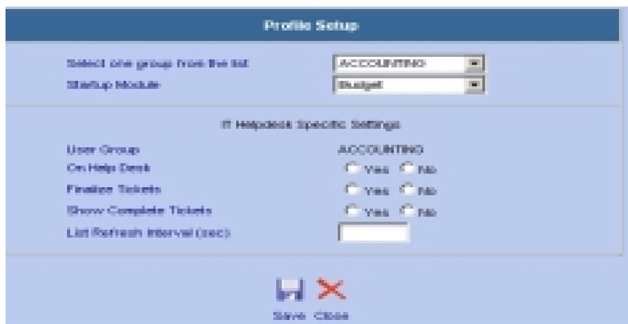
13.6 Group Profile Setup

The Group Profile Setup allows administrator to setup certain defaults for groups of users (see Setting up User Groups section of this chapter for more information).



To edit Group Profile Setup (from the main Admin screen):

- Click on OPERATIONS from the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Group Profile Setup from the drop down menu. The Group Profile Setup window comes up.



- Use the drop down menu beside Select one group from the list to load different options for that group.
- Use the drop down menu beside Startup module to select a module that will become the default module when entering the Web Work system for the group selected above in the Select one group from the list drop down menu. (i.e. – the graph shows that the Admin module will come up as a default module for any user that is part of the Admin group)
- Click on the  save icon to save your changes.
- When all done, click the button  close icon to exit the Group Profile Setup screen.

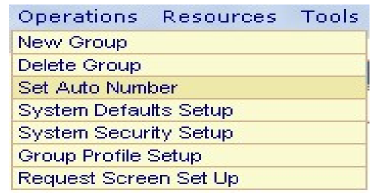
13.6.1 IT Helpdesk Specific Options

- On Help Desk – if this option is set to YES then users in this group will be assumed to be working in a HELP DESK environment. More details are available in the IT Help Desk chapter.
- Finalize Tickets – if this option is set to YES then users in this group can FINALIZE tickets.
- Show Complete Tickets – if this option is set to YES then completed tickets will show in the users worklist.
- List Refresh Interval – the number of seconds that the IT Help Desk work lists will refresh.

Users must log off and log back into Web Work for the group changes to take place.

13.7 Set Auto Number

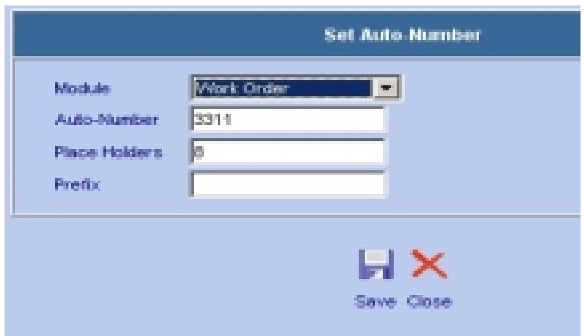
With Web Work you can customize the numbering scheme for auto-numbering of record codes including: Equipment number, inventory number, PM record number, Purchase Order number, Procedure number, Item Request number, Vendor number and Work Order number.



To set Auto-Numbers (from the main Admin screen):

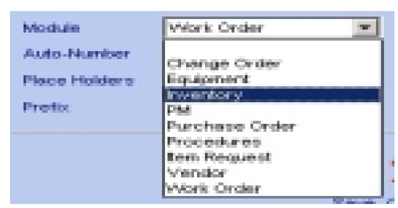
- Click on OPERATIONS on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Auto Number from the drop down menu.

The Set Auto-Number screen will open as pictured below.



- Select the module from the drop down list of modules to choose which module you wish to set auto numbering for:

If Auto Numbering has already been setup for the module you select, the applicable fields will be populated accordingly.

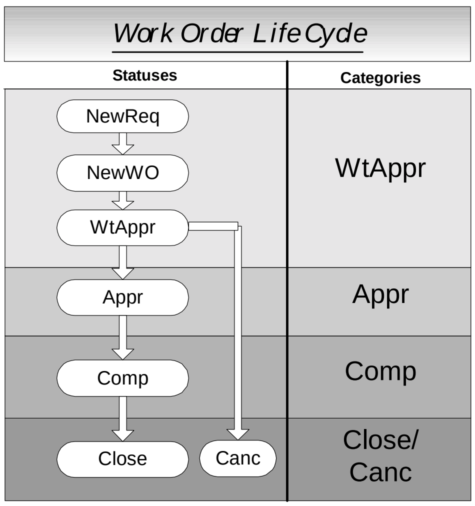


- Enter a value into the Auto Number field. It is from this number the numbering of new records will continue from. For example if you choose the Work Orders module, and enter 105, the next work order number would be 105, then 106, 107 and so on.
- Enter a value into the Place Holders field. This number determines how many digits the full number will occupy. For example if you choose 105 as your next work order auto number and you select 6 as a Place Holder, the next work order number will be 000105.
- Enter a prefix if applicable. For example if you choose your organizations initials "RT-" as the prefix for work orders and have already set up the next number to be 000105, the next work order will be numbered RT-000105.
- Click on the save icon to save your changes.
- When all done, click the button close icon to exit the auto-numbering screen.

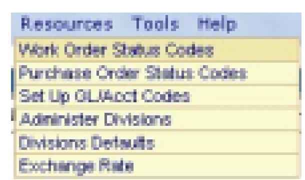
13.8 Work Order Status Codes

Web Work - Work Order status codes are setup in the Admin module. The system comes with seven standard status codes that cannot be changed: NEWREQ (New Request), NEWWO (New Work Order), WTAPPR (Waiting Approval), APPR (Approved), COMP (Complete), CLOSE (Closed) and CANC (Cancelled). The user may then create new status codes fitting the company business needs.

Each Work Order status code belongs to a category. Each status is then defined by its own Category. Categories are pre-defined and cannot be changed. Categories include: APPR (approved), CANC (canceled), CLOSE (close), COMP (completed) and WTAPPR (Waiting for Approval).



13.8.1 Adding New Work Order Status Codes



To create new Work Order Status Codes (from the main Admin screen):

- Click on RESOURSES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.

- Select Work Order Status Codes from the drop down menu.

- The work order status codes screen will open. A list of all work order status codes will be displayed in a table along with their category and description.

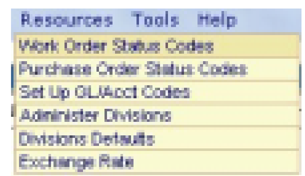
- To add a work order status code click on the  new icon.

- The New Work Order Status screen will open as pictured below:

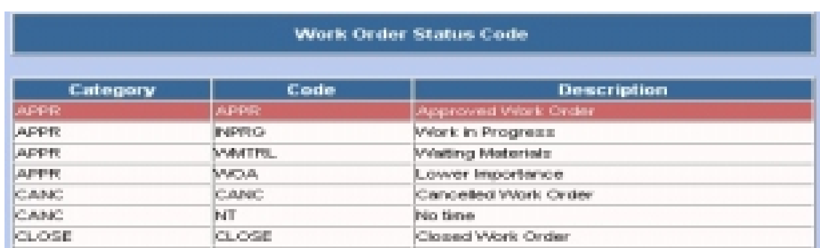
- Click on the down arrow to select the Category.
- Enter the new status code.
- Enter a description for the new status code.
- Click on the save icon to save the status code.

13.8.2 <u>Editing Work Order Status Code Description</u>

To edit Work Order Status code description (from the main Admin screen):



- Click on RESOURCES in the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Work Order Status Codes from the drop down menu.
- The work order status codes screen will open. A list of all work order status codes will be displayed in a table along with their category and description.



Work Order Status Code

Category	Code	Description
APPR	APPR	Approved Work Order
APPR	INPRG	Work in Progress
APPR	WMTRL	Waiting Materials
APPR	WOA	Lower Importance
CANC	CANC	Cancelled Work Order
CANC	NT	No time
CLOSE	CLOSE	Closed Work Order

- To edit status code information, click on the applicable status line (category, code or description). The Edit Work Order Status screen will open.
- Update the status code description as required.

Note: only the description field can be edited. To make the status code a different code, you have to delete the old code and create a new one. Any work order status history referencing the old code will still reference the old code even after deletion.

- Click on the save icon to save the updated status code. Click on the close icon to close the edit work order status screen without updating the status code.

13.8.3 Deleting Work Order Status Codes

To delete a Work Order Status code (from the main Admin screen):

- Open the Work Order Status Codes screen, and select the code you wish to delete using the procedure above in Edit Work Order Status Codes.

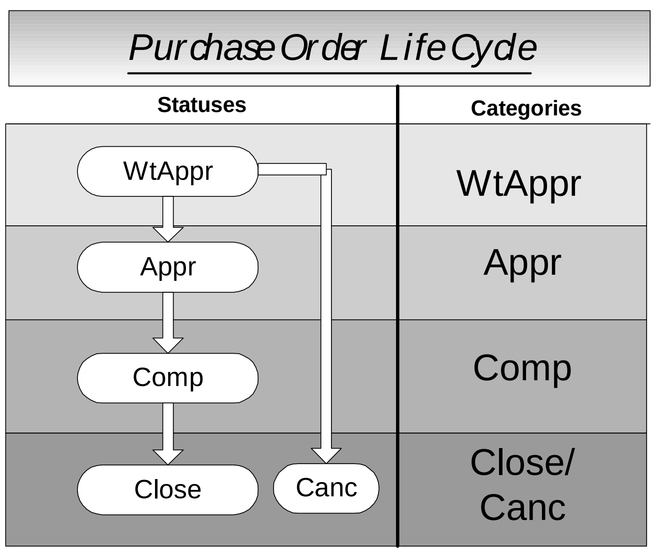
- When you open the status code in EDIT mode, instead of updating, click on the  delete icon instead to delete the code.

- SYSTEM status codes cannot be deleted!

13.9 Purchase Order Status Codes

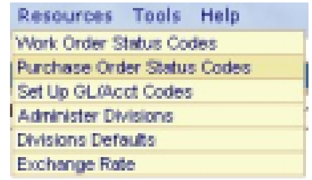
Web Work Purchase Order status codes are setup in the Admin module. The system comes with five standard status codes that cannot be changed: WTAPPR (Waiting Approval), APPR (Approved), COMP (Complete), CLOSE (Closed) and CANC (Cancelled). The user may then create new status codes fitting the company business needs.

Each Purchase Order status code belongs to a category. Each status is then defined by its own Category. Categories are pre-defined and cannot be changed. Categories include: APPR (approved), CANC (canceled), CLOSE (close), COMP (completed) and WTAPPR (Waiting for Approval).

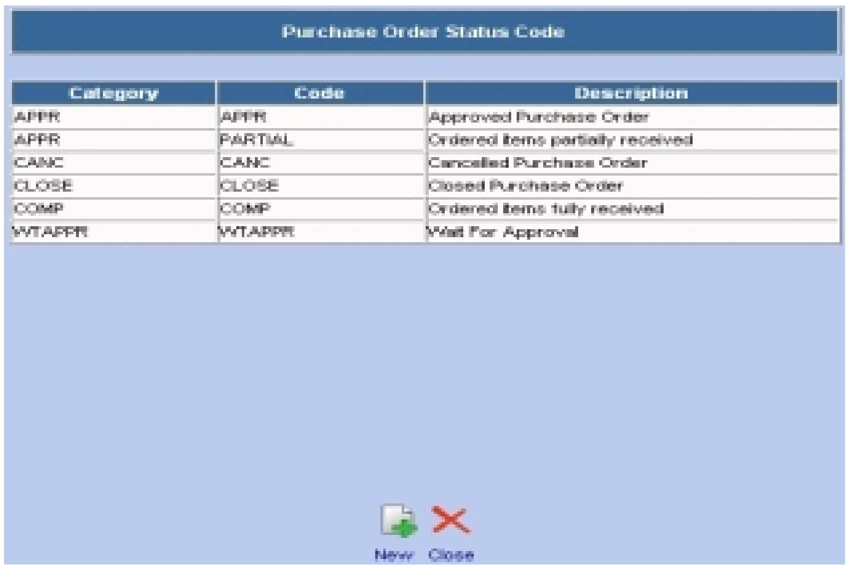


13.9.1 Adding New Purchase Order Status Codes

To create new Purchase Order Status Code (from the main Admin screen):



- Click on RESOURCES in the Module Option menu at the top of the Admin Screen to display the drop down menu.
- Select Purchase Order Status Codes from the drop down menu.
- The Purchase order status codes screen will open. A list of all Purchase order status codes will be displayed in a table along with their category and description.



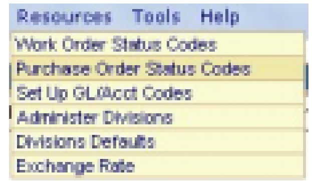
Category	Code	Description
APPR	APPR	Approved Purchase Order
APPR	PARTIAL	Ordered items partially received
CANC	CANC	Cancelled Purchase Order
CLOSE	CLOSE	Closed Purchase Order
COMP	COMP	Ordered items fully received
WTAPPR	WTAPPR	Wait For Approval

- To add a new Purchase order status code click on the  new icon.
- The New Purchase Order Status screen will open as pictured below:

- Click on the down arrow  to select the Category.
- Enter the new status code.
- Enter a description for the new status code.
- On the  save icon to save the status code.

13.9.2 Editing Purchase Order Status Code Description

To edit Purchase Order Status code description (from the main Admin screen):



- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Purchase Order Status Codes from the drop down menu.
- The Purchase order status codes screen will open. A list of all Purchase order status codes will be displayed in a table along with their category and description.

Purchase Order Status Code

Category	Code	Description
APPR	APPR	Approved Purchase Order
APPR	PARTIAL	Ordered items partially received
CANC	CANC	Cancelled Purchase Order

- To edit status code information, click on the applicable status line (category, code or description). The Edit Purchase Order Status screen will open.

- Update the status code description as required.

Note: only the description field can be edited. To make the status code a different code, you have to delete the old code and create a new one. Any Purchase order status history referencing the old code will still reference the old code even after deletion.

- Click on the save icon to save the updated status code. Click on the close icon to close the edit work order status screen without updating the status code.

13.9.3 Deleting Purchase Order Status Codes

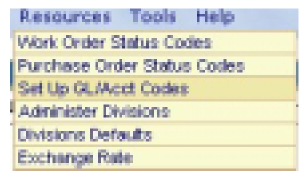
To delete a Purchase Order Status code (from the main Admin screen):

- Follow the procedure as above to select the status code for editing.
- Click on the  delete icon to delete the selected work order status code. Note only user-defined status codes can be deleted.

13.10 GL/Acct Codes

The set up GL/Acct Codes feature permits general ledger accounts to be set up and later be assigned to Work Orders, PMs, Equipment, Locations, POs etc.

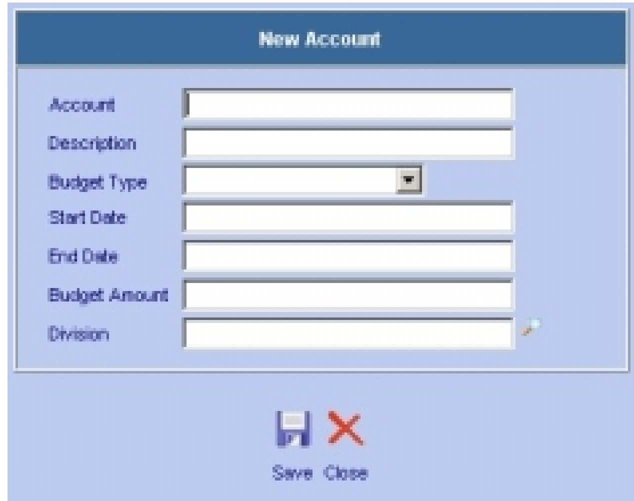
13.10.1 Adding GL/Account Codes



To add new GL/Account codes (from the main Admin screen):

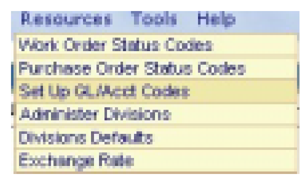
- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Set Up GL/Acct Codes from the drop down menu to open the Account Selection screen as shown at right.

- Click on the  filter icon to show a list of the accounts currently in the Web Work database. (Make sure the account you are adding does not already exist!)
- Click on the  new icon to open the New Account screen.



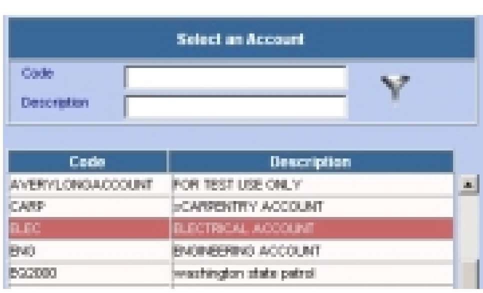
- Enter the Account code.
- Enter a description for the code.
- Select the Budget Type from the dropdown (Budget Type is administered in the Budgets module)
- Enter the start and end dates for budgeting
- Enter the budget amount for the time period entered.
- Enter the Data Division , if applicable, for this GL Code (NOTE: leaving the Division blank will make the GL code available to all divisions)
- Click on the  save icon to save the new account or on the  close icon to close the New Account screen without updating.

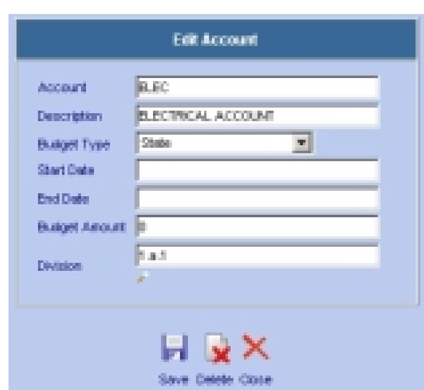
13.10.2 Editing GL/Account Codes



To edit GL/Acct codes (from the main Admin screen):

- Click on RESOURCES from the Module Options Menu at the top of the Admin Screen to display the drop down menu.
- Select Set Up GL/Acct Codes from the drop down menu to open the Account Selection screen.
- Click on the  button to show a list of the accounts currently in the Web Work database.
- Click on the Account line to open the account in edit mode. The Edit Account screen will come up similar to the one provided:





- Edit the account details as necessary. NOTE: It can be a very bad business practice to modify your G/L codes once they have been used – please ensure that you have verified all accounting implications of changing GL codes that are in use.

- Click on the save icon to save the updated account information or on the close icon to close the Edit Account screen without updating.

Note: The Account code cannot be edited. To make the code a different code, you have to delete the old code and create a new one. Any transactions with old code will still reference the old code even after deletion.

13.10.3 <u>Deleting GL/Account Codes</u>

To delete GL/Acct codes (from the main Admin screen):

- Follow the procedure above for Editing a GL code, and select the code you wish to delete.

- Open the EDIT G/L code window by clicking on the GL code from the listing.

- Click on the delete icon to delete the applicable account code. The edit account code screen will close and return you to the Account Selection screen.

Note: Deleting an account code will not effect any transactions referencing the code. Transactions will still reference the old deleted code.

13.11 Administering Divisions

Web Work allows you to setup data divisions to segregate information between different divisions within your organization. Data divisions are setup in a hierarchal fashion with information being available to those in the same division or divisions lower.

13.11.1 Understanding Data Divisions

Data division functionality in Web Work is an optional feature (refer to section of this chapter called Setting up Web Work defaults to learn how to turn data division on). If Data division feature is turned on, each record in the database needs to belong to a data division. **Records that are not assigned to data division (data division field is NULL) are global records and every user of the system may access these records regardless of the user data division**.

First of all, the data division codes need to be setup. To set these codes correctly, you have to think of all possible ways of viewing data including possible future changes within the organization before a working model can be determined. Tero Consulting has good experience helping clients like you achieving working model.

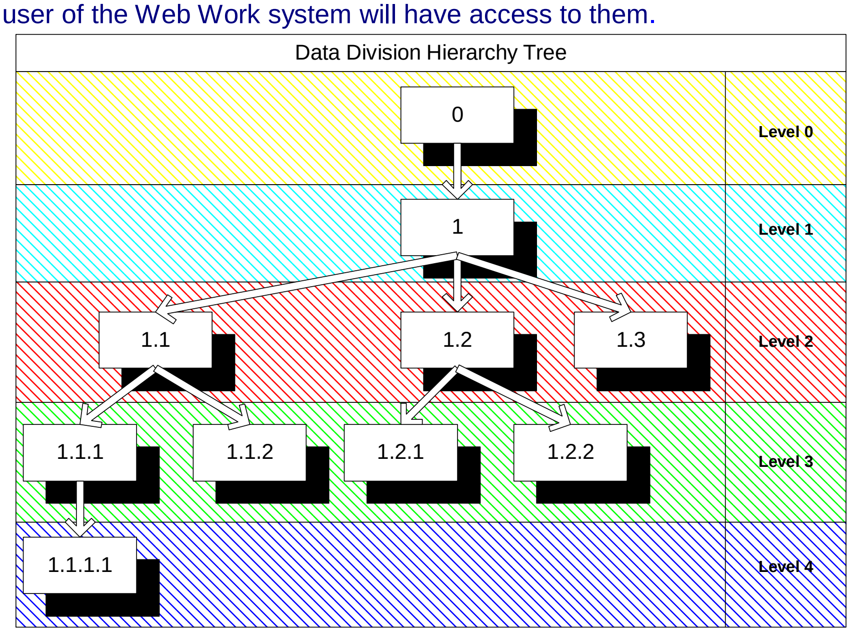
Secondly all labour records need to be data divisionized. The labour record is what is used to log into Web Work. Once the user logs into Web Work using his employee ID, the data division saved with his labour information is then used as his Data division. Refer to chapter called Labour for further explanation.

Lastly all other records in the Web Work system need to have data division assigned. These records include work orders, pm records, procedures, equipment, locations, purchase orders, inventory storerooms, some global codes like GL accounts and many more. As user creates new record or performs a record query, the data division with the users correct data division code will automatically be included. User does not have to worry about data division as Web Work will help user with assigning data division automatically.

Note: Not all records in the Web Work system may be assigned to a data division. Global records like WO type, Priority, Statuses, Equipment Types and others cannot be data divisionized and every user of the Web Work system will have access to them.

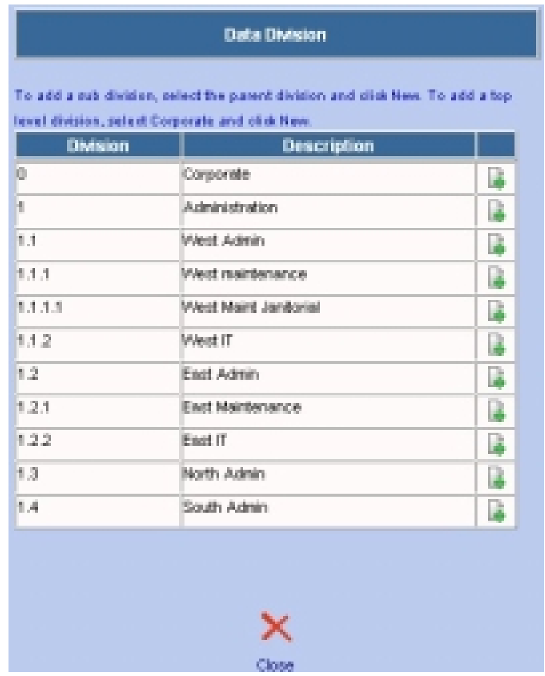
Once the data division coding is set, Labour records are data-divisionized and all other records in the database are also data-divisionized as a result, when user tries to add new or query old data, the user may see only records where the record data division matches the users data division. Subsequently the user may change data division manually to a lower division (if applicable). The user may never see divisions that are on the same level as his or level above.

The diagram shows an example of recommended coding of data division codes, the hierarchy and the different levels created as a result.



To access the Administer Divisions screen (from the main Admin screen):

- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Administer Divisions from the drop down menu.
- The Division Selection screen similar to the screen pictured at right will open:



13.11.2 <u>Adding new Data Divisions</u>

Web Work ships with one default data division (Division 0 – Corporate). New data divisions can be added only as CHILDREN to an existing division, so Division 0 (Corporate) will always be the highest level division. This prevents 'orphaning' of any divisions in your division hierarchy.

To add new data divisions (from the main Admin screen):

- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Administer Divisions from the drop down menu.
- Locate the PARENT for your new data division, and click on the new icon beside that division to add a new child division. The New Division screen will be displayed (note that the parent is already filled in and is a READ ONLY field):

Enter the new Division code and its description.

- Click on the save icon to save the new Data division level or on the close icon to close the New Division window without adding.

Tero recommends using numbering scheme separated by comma – i.e. "1", "1.1", "1.1.1", "1.1.2", "1.2", "1.2.1", "1.2.2", "1.3" and so on. The software will automatically determine the correct hierarchical relationships if you use the recommended coding.

If you try to enter a division higher than the division you are assigned to, the following message box will appear:

If you see this message, enter a data division code that is lower than your current data division level.

- You can continue these steps until you have setup all the desired divisions of your company,

13.11.3 Editing Data Divisions

To edit existing data division description (from the main Admin screen):

- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Administer Divisions from the drop down menu.
- Locate the data division you wish to edit, highlight it and click in the Division or Description column to open the Edit division window.

- Update the description for this division code.
- Click on the check box ☐ beside Update Parent to automatically reset the parent division. If the correct parent is already displayed, there will be no change to the parent field.
- Click on the save icon to save the changes to the division or click on the close icon to close the Edit Division window without updating.

If you set up data divisions for your company, access to information in the Web Work system will be setup according to the data division assigned to each user through their labour record.

13.11.4 Deleting Data Divisions

Before deleting a data division, make sure there are no records that are currently assigned to that data division, especially any labour records. If applicable, update all records to the new data division first! If user is to access the Web Work system with his / her labour record assigned to non-existent data division, the user will be able to see only records that would match his/her old data division.

To delete existing data division (from the main Admin screen):

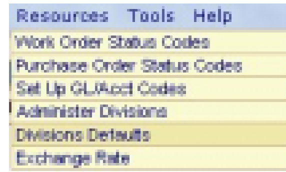
- Follow the procedure above for Editing a Data Division, and select the division you wish to delete.
- Open the EDIT Division code window by clicking on the division from the listing.
- Click on the delete icon to delete the applicable data division. The edit division screen will close and return you to the Account Selection screen.

13.12 Division Defaults

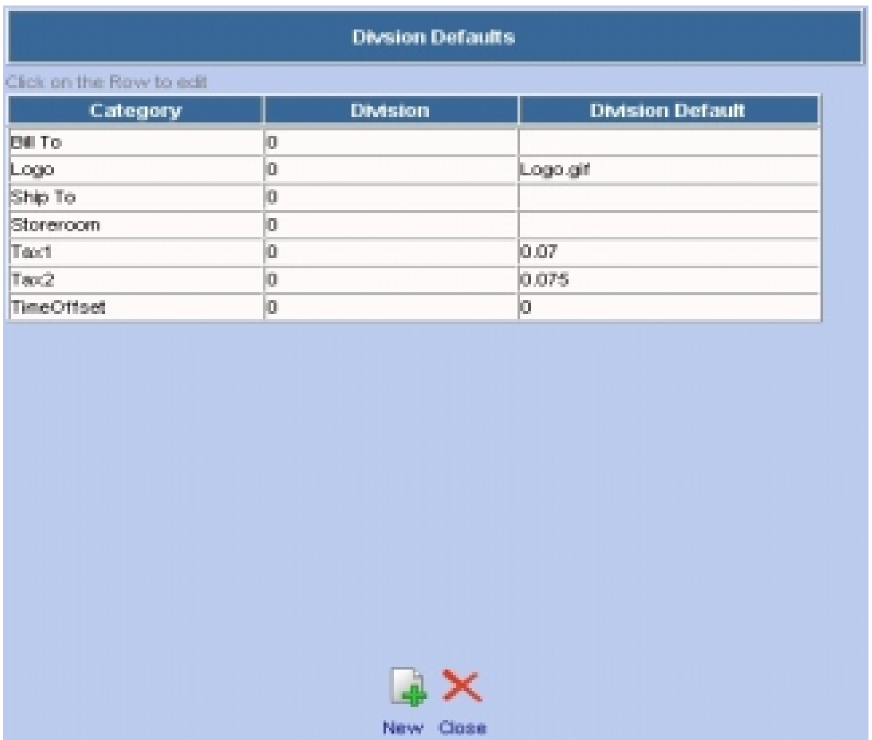
Division Defaults can be setup in Web Work so that each data division may have its own custom information. Based on the data division of the user logging into Web Work, the appropriate default will be used. The division default options include: Bill To, Ship To, Logo, Tax1 and Tax2, Storeroom and Time Offset.

Bill To:	default Bill To address for a new Purchase Order
Ship To:	default Ship To address for a new Purchase Order
Logo:	a graphic used on all reports unique to the particular data division
Tax1:	Default Tax1 applied to transactions for the particular data division
Tax2:	Default Tax2 applied to transactions for the particular data division
Storeroom:	Default storeroom used when dealing with picking inventory items for the particular data division
Time Offset:	Web Work used on larger scale may be used across multiple time zones. The Time Offset feature setup by data division insures correct time used on all transactions.

To access the Division Defaults screen (from the main Admin screen):

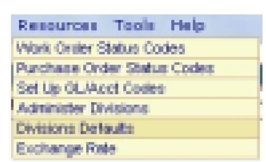


- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Division Defaults from the drop down menu.
- The Division Defaults window will open (see sample graphic):
- A list of all current defaults will be displayed.

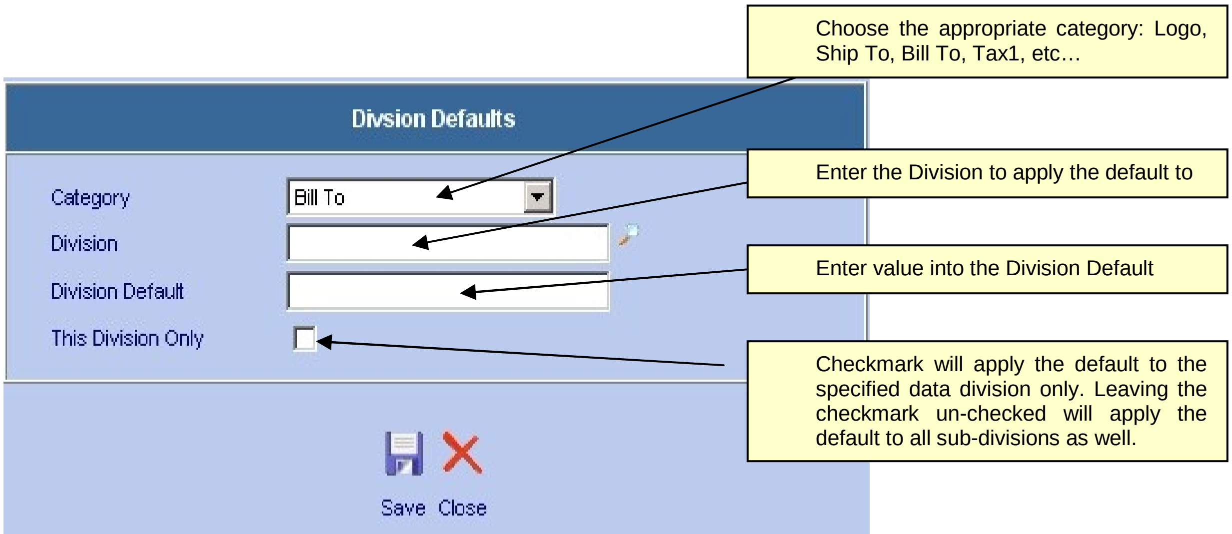


13.12.1 Creating new Division Defaults

To add new Division Defaults (from the main Admin screen):



- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Division Defaults from the drop down menu.
- The Division Defaults window will open (see sample graphic)
- Click on the on the  new icon to open the New Default screen (see sample graphic below):



- Click on the save icon to save the changes to the division default or click on the close icon to close the New Default window without creating a new Default.

By changing a logo default, you will be asked to upload the logo file to your server. The logo must be in GIF format and 200 by 100 pixels. In addition, you must have rights to upload a file onto the server where Web Work is installed. Please see you server administrator for details.

13.12.2 Editing Division Defaults

To edit existing Division Defaults (from the main Admin screen):

- Click on RESOURCES on the Module Option Menu at the top of the Admin Screen to display the drop down menu.
- Select Division Defaults from the drop down menu.
- The Division Defaults window will open (see sample graphic above)

- Click onto a default line you wish to edit. The Edit Default window will open:
- Change Default settings as necessary. Use the to lookup the division.
- Click on the save icon to save the changes to the division default

13.12.3 <u>Deleting Division Defaults</u>

To delete an existing Division Default:

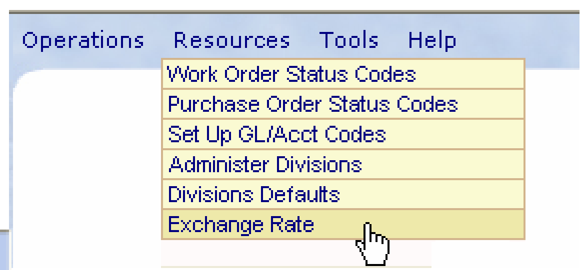
- Follow the procedure above for Editing a Division Default, and select the default you wish to delete.
- Open the EDIT Division Default window by clicking on the category/division from the listing.
- Click on the delete icon to delete the applicable division default. The edit default screen will close and return you to the Account Selection screen.

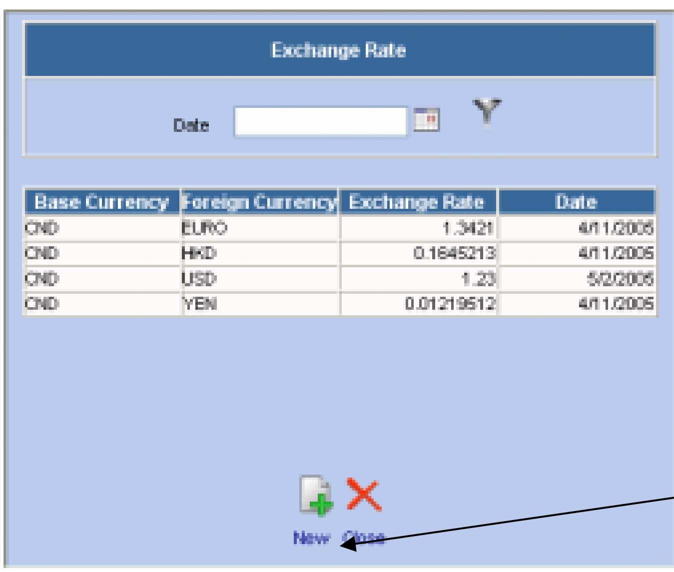
13.13 Multiple Currency

Web Work has the ability to manage multiple currencies for Purchasing items in foreign currencies. You must choose a Base currency for your system. This is usually the set to the currency used by the corporate office and is the same currency you use for accounting reports and tax purposes. This should already be set as describe in the System Defaults section for Purchasing above.

To setup your multiple currencies:

- Open the Admin Module and from the Resources menu choose Exchange Rate as Shown here
- The following screen should appear.





- The first time you enter this screen you will have to click the new icon to enter you Base Currency and the first Exchange Rate.
-

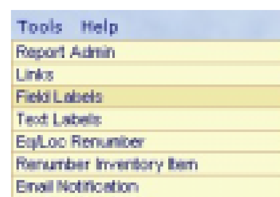
Click here to Add the New Currency.

- The screen shown to the right, should be used to setup the Exchange Rates between currencies.
- Note: you will need to update these rates on a regular basis. This screen is also accessible from the PO screen making it easier to update each day as you go to create new POs.
- The next step is done in the Vendor Module and this as where you link the type of currency to use to a Vendor. The type of currency used on a PO will be determined by the Vendor used.

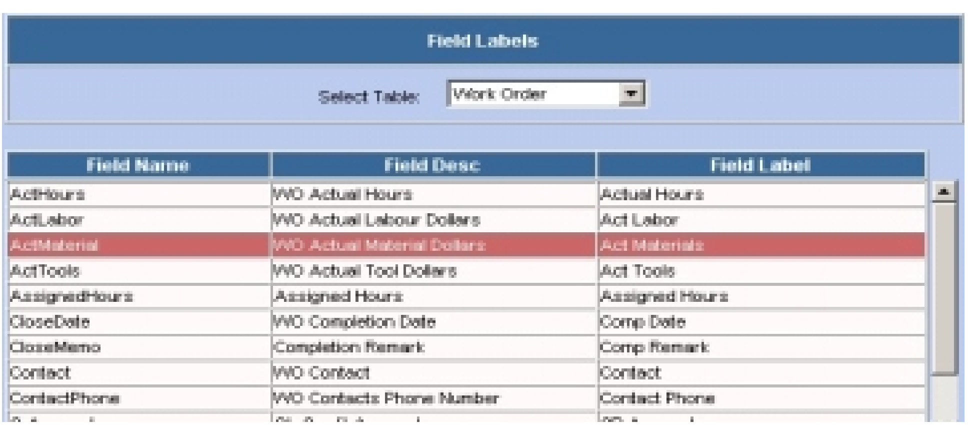
13.14 Field Labels

Field label is a description of a field anywhere in the Web Work system. The Field Labels feature allows you to change the caption of each Web Work Field to suit your organization's needs (For example, your organization may use the term "TRADE" instead of "CRAFT". The Field Label screen is organized into database tables rather than modules, but after little practice you will notice that the tables are matching the different screens in Web Work modules.

To edit field labels (from the main Admin screen):



- Click on TOOLS on the Module Option Menu at the top of the Admin Screen to display the drop down menu
- Select Field Labels from the drop down menu. The Edit Field Labels screen comes up (see sample graphic below):

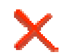


- Choose the table from the Select Table dropdown to select which table field labels you wish to modify.

- Highlight and click on the row in the table of the field that you wish to modify. The Edit Field label screen will be displayed as below:

- Change the Field Label to be the text you wish to have showing on the field label.

- If you wish to update the field in all other screens where this field label exists, check the Apply to all checkbox ; otherwise leave the checkbox blank and only this particular field label will be updated.

- Click on the  save icon to save the changes to the field label or click on the  close icon to close the Edit field label window without any updates made.

13.15 Text Labels

The Text Labels feature controls all of the SYSTEM text within Web Work – text in the popup windows, icon labels, system message, etc. These fields should only ever be altered by someone who is completely confident in why they are doing so, and the implications of changing them. This functionality allows Web Work to be 100% customizable software, and gives multi-lingual support to the product.

For details on using the text labels function, please contact Web Work support @ Tero Consulting.

13.16 Equipment / Location Renumbering

The Equipment / Location Renumbering feature is a utility which allows you to change a current Equipment or Location code to a new code. By doing so, all places in the Web Work database with the old code will be updated to the new code, including history transaction records like work orders.

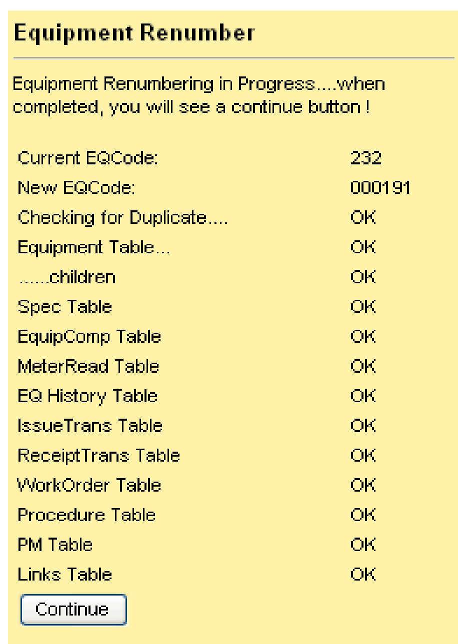
To renumber equipment or a location code (from the main Admin screen):

- Click on TOOLS on the Module Option Menu at the top of the Admin Screen to display the drop down menu

- Select Eq/Loc Renumber from the drop down menu. The Equipment / Location renumber screen comes up (see sample graphic below):

- To renumber equipment, enter the current equipment code in the Current Equipment Code field or use the lookup icon to select the code from a list.
- To renumber a location, enter the current location code in the Current Location Code field or use the lookup icon to select the code from a list.
- Manually enter the new code for the equipment or location, or check the USE AUTO NUMBER box to have the system automatically generate the new equipment or location code.
- Click save icon to renumber the equipment or location, or click close icon to close without renumbering.

Only Equipment OR Location code can be changed at one time. If you were to enter both current location and equipment values in and tried to update both to new code, a message saying "You can only select one equipment or one location" will come up.



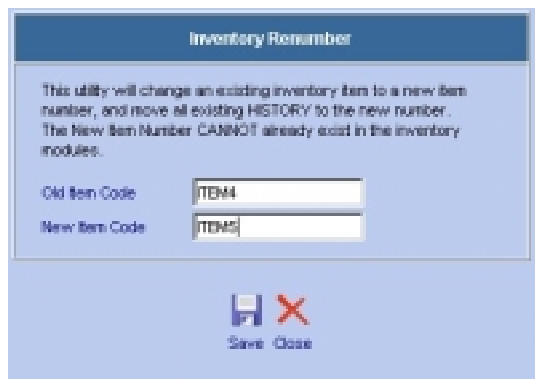
- As the program goes through the various tables in the database changing the equipment or location code, you will see each step of the process in the window.
- Once the process is complete, a CONTINUE button will appear at the bottom of the list.
- Click on the Continue button to return back to the main Admin module.

13.17 Renumber Inventory Item

Like the Equipment/Location renumbering, the Renumber Inventory Item procedure can be used to change the item number for an inventory item. This is not meant to be a day to day activity!! This function exists to correct mistakes/typos or in the rare occasion where an item number has to be changed for reasons outside of the control of the Web Work program.

To renumber and inventory item (from the main Admin screen):

- Click on TOOLS on the Module Option Menu at the top of the Admin Screen to display the drop down menu
- Select Renumber Inventory Item from the drop down menu. The Renumber Inventory Item renumber screen comes up (see sample graphic below)



- Enter the OLD Item code (this is the inventory item code as it exists in the system currently)
- Enter the NEW Item code (this is the code that you want the item to be known by from now on.
- Click on the save icon to renumber the item, or the close icon to quit without renumbering

- As the program goes through the various tables in the database changing the equipment or location code, you will see each step of the process in the window.
- Once the process is complete, a CONTINUE button will appear at the bottom of the list.
- Click on the Continue button to return back to the main Admin module.

13.18 Email Notification

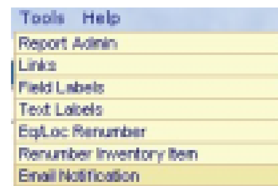
Email Notification is used to automatically notify people of certain changes in a work order or a purchase order through an email. There are two triggers that would invoke the e-mail notification – 1. A change in status of the order occurs or 2. Predefined period of time elapses.

In order for the email notification, or any Web Work integrated email functions to work correctly, the system defaults must be configured to connect Web Work to an email server. Web Work uses a standard SMTP protocol email server, and must be able to connect to the server, without authentication, in order to send messages automatically.

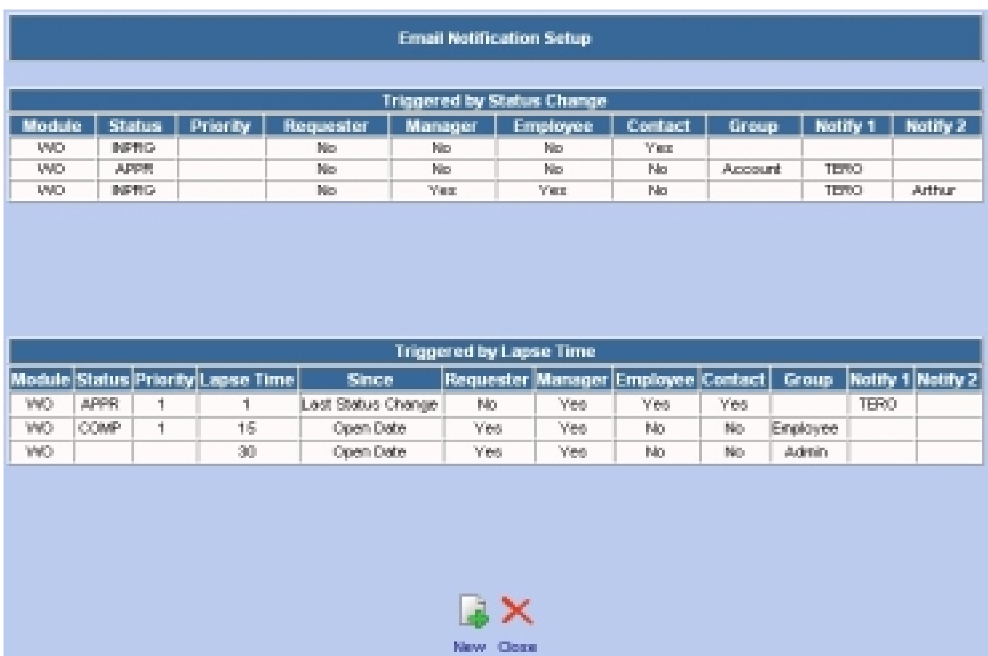
All labour records in the Labour module (incl. employees, managers, assignees, contacts etc…) must have a valid e-mail address filled within the e-mail field before they can receive e-mails, generated by the Web Work system.

13.18.1 Email Notification

To configure Email Notification (from the main Admin screen):



- Click on TOOLS on the Module Option Menu at the top of the Admin Screen to display the drop down menu
- Select Email Notification from the drop down menu. The Email Notfication setup screen, similar to the one below, will be displayed



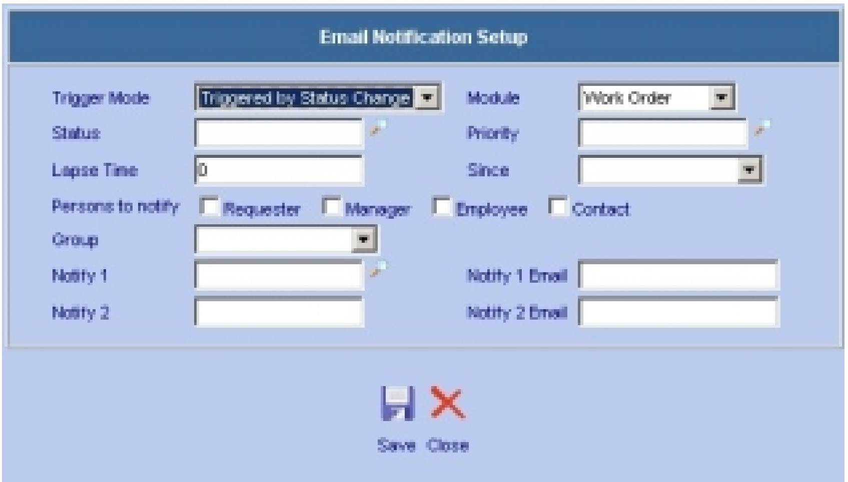
Module	Status	Priority	Requester	Manager	Employee	Contact	Group	Notify 1	Notify 2
WO	INPRG		No	No	No	Yes			
WO	APPR		No	No	No	No	Account	TERO	
WO	INPRG		No	Yes	Yes	No		TERO	Arthur

Module	Status	Priority	Lapse Time	Since	Requester	Manager	Employee	Contact	Group	Notify 1	Notify 2
WO	APPR	1	1	Last Status Change	No	Yes	Yes	Yes		TERO	
WO	COMP	1	15	Open Date	Yes	Yes	No	No	Employee		
WO			30	Open Date	Yes	Yes	No	No	Admin		

An Email Notification can be created for a status change or lapse time for Work Orders or Purchase Orders.

13.18.2 Creating a New Email Notification

- Open the Email Notification Setup screen as shown above.
- Click on the on the new icon to open the New Email Notification screen



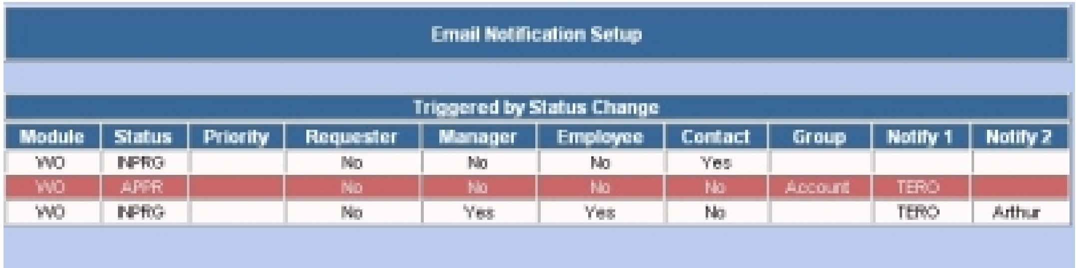
To create a new e-mail notification:

- o Choose the Trigger mode to be Trigger by Status Change or by Trigger by Lapse Time
- o Select the module for this email notification: work order, purchase order or item request
- o For e-mail notification triggered by a Status change, enter the status that will trigger it
- o For e-mail notification triggered by Lapse Time:
  - o 1. enter the number of days into the Lapse time field with
  - o 2. In the Lapse Time Since: field, select if the number of days is calculated from the Open date of the order or the Last status change date of the order.
- o As an option, enter the priority of the order that will be considered as part of the trigger filter (i.e. if priority 1 is entered, only Purchase and Work orders with priority 1 will be considered)
- o Check off what persons are to be notified: the Requestor of the order, the assigned Manager (if applicable), the Assignee (if applicable) and the Contact for the order.
- o Choose a group of people within the Notify Group dropdown (same as groups setup within the admin module). The e-mail will be also be sent out to those people (i.e. the Managers group)
- o You may also enter a unique individual into the Notify1 field or use the lookup icon to select the individual from a list
- o Also, you may manually type in one more person into the Notify2: field

- Click on the save icon to save the email trigger.
- There can be many triggers setup for each module.

13.18.3 Editing Email Notifications

- Open the Email Notification Setup screen as shown above.
- Select the email notification that you would like to edit by highlighting and clicking that items row. The



Email Notification Setup

Triggered by Status Change

Module	Status	Priority	Requester	Manager	Employee	Contact	Group	Notify 1	Notify 2
WO	INPRG		No	No	No	Yes			
WO	APPR		No	No	No	No	Account	TERO	
WO	INPRG		No	Yes	Yes	No		TERO	Arthur

Edit Email Notification screen comes up.

- Make any changes and then click on the  save icon to save any changes to the email trigger.

13.18.4 Deleting Email Notifications

- Open the Notification Item as described above for editing.
- From the Email Notification Setup edit window, click the  delete icon to remove the item.