



IMPLEMENTATION

September 2011

1. Introduction	1
1.1. Before System Configuration.....	2
2. General Settings	5
2.1. Heading Appearance.....	7
2.2. Local Settings and Phone.....	8
3. Security	11
3.1. Use of SSL Certificates.....	12
3.2. Security of Passwords and Working Sessions	14
3.3. Users' Authentication.....	15
3.4. Proxy Server Configuration.....	18
4. Company Structure	19
4.1. Creating Departments and Groups.....	20
4.2. Checking the Structure Correctness.....	23
5. Users	25
5.1. Adding Users to TeamWox	27
5.2. Configuring Users' Profiles.....	32
5.3. Security of Users and Widgets.....	36
5.4. Binding Users to Groups.....	39
5.5. Choosing Department Managers.....	41
6. Access Rights	43
6.1. Setup of Permissions.....	47
7. E-Mail	49
7.1. Creating Personal Mailboxes.....	50
7.2. Creating Corporate Mailboxes.....	52
8. Documents	53
8.1. Creating the Structure of Documents	54
8.2. Setting Access Rights for Documents	56
8.3. Adding Documents.....	58

9. Organizations.....	62
9.1. Adding Organizations.....	65
9.2. Adding Contacts.....	68
9.3. Setting Access Rights for Organizations	70
9.4. Linking Documents to Organizations.....	71
10. Board Configuration.....	74
11. Chat.....	78
11.1. Integration of Chat to Website	82
12. Service Desk.....	85
12.1. Setup of Service Groups	86
12.2. Integration of Service Desk to Website	90
13. Products.....	92
13.1. Filters Configuration.....	97
14. Accounting.....	99
14.1. Configuration of Accounting Books.....	100
14.2. Adding Invoices	102
14.3. Adding Payments.....	105
14.4. Creating Templates for Invoice Printing	109
15. Advanced.....	111
15.1. Search System.....	112
15.2. Backup	115
16. Conclusion.....	116

This document is intended for implementation of the TeamWox system in the enterprises. It covers all the stages of introduction and describes all the necessary operations, after the completion of which the system can be considered introduced.

Attention: The document describes operations, which have to be done right after the installation of the system. The installation of TeamWox is not covered in this document.

The given instruction describes all the necessary steps, which have to be done consistently for the successful introduction of the TeamWox system in the enterprise. The necessary steps cover the configuration of the following modules: "Administration", "Team", "E-Mail", "Documents", "Organizations" and "Contacts", "Board", "Chat", "Service Desk", "Products" and "Accounting". The document also describes how to configure search indexes and data backup.

Right after the installation, it's necessary to activate the license and update the server to the latest version. To do that the TeamWox server must be connected to the Internet. A non-activated system is limited with the number of users (5) with the "Working" status (a user can authorize and work in the TeamWox system), and it's impossible to get the updates. If the system is not activated, the "Activate server" button appears in the Quick Command panel of tabs "Administration -> "Overview" and "Administration" -> Modules".

Administration

→

Overview

→

Connection

→

Settings

→

Security

→

Backup

→

Groups

→

Users

→

Modules

→

Sounds

→

Requests

→

Journal

→

Statistics

ABC Company | [Restart server](#) | [Activate server](#)

TeamWox® 1.00 build 989 (22 Jul 2010)

Domain: abccompany.tmwox.net TeamWox Support 

License: unlimited

Subscription: unlimited

Users: 1 of 10 (Groups: 2, Departments: 5)

Upgrade Your License!

The number of users in your system is nearing the maximal allowed total number for your license. Buy the extended system version to easily add more new employees to your TeamWox. Read details at www.teamwox.com

Users	Price	Subscription	Price currency
10	free	free*	USD ▼
25	3 400	675	Current version Buy
50	6 700	1 350	Buy
unlimited	10 000	2 000	Buy

Server is not activated

Click 'Activate Server' to activate the server and start receiving updates and using additional server functions.

Last installed update dated 22 Jul 2010

Backup is absent

[Check for updates and upgrade](#)

Administration

→

Restart server | [Activate server](#)

→

Connection

→

Settings

→

Security

→

Backup

→

Groups

→

Users

→

Modules



Tasks

Module for working with tasks

© 2006-2010, MetaQuotes Software Corp., Version: 1.00 build 538 (19 Jul 2010), Data size: 256 Kb

✔
Loaded



Documents

Module for working with documents

To begin the activation process, press the "Activate server" button on the Quick Command panel. If the process of activation is successful, the system will be updated to the latest version automatically, and the TeamWox server will be restarted. This indicates the activation process is over.

Attention: If the activation of the server can't be completed successfully, check the Internet connection settings of the server and the proxy server connection settings.

If the system has been activated earlier, you need to check and install the latest updates of the TeamWox system. To do it, press the "Check updates and upgrade" button in the "Administration -> Browse" tab.

Automatic update on

Last installed update dated 08 Jul 2010
Last backup: 2010.07.21 00:00

[Check for updates and upgrade](#)

Check the option of the TeamWox live update. If the live update is on, every night at 3 am local time the system connects to the Live Update server and checks if there are any updates available. For example, if the server runs on Moscow time (GMT +03:00), the check for updates will be performed at 3 am Moscow time. If there are any updates, the TeamWox server downloads and installs them and then restarts automatically. To enable the automatic update, choose "on" in the appropriate box.

If the automatic update is off, the updates are checked and downloaded anyway, but are not installed. In the "Control -> Modules" tab in front of an appropriate module, the "Update is available" indicator appears. To install the updates click "Update server" in the "Control -> Modules" tab. Then restart the TeamWox server manually by pressing the appropriate button on the Quick Command panel.

Then in the "Administration -> Browse" tab, check the server address, which uses the current license ("Domain" field), the license expiration date ("License" field) and the period of the subscription for updates ("Subscription" field).

TeamWox® 1.00 build 993 (23 Jul 2010)

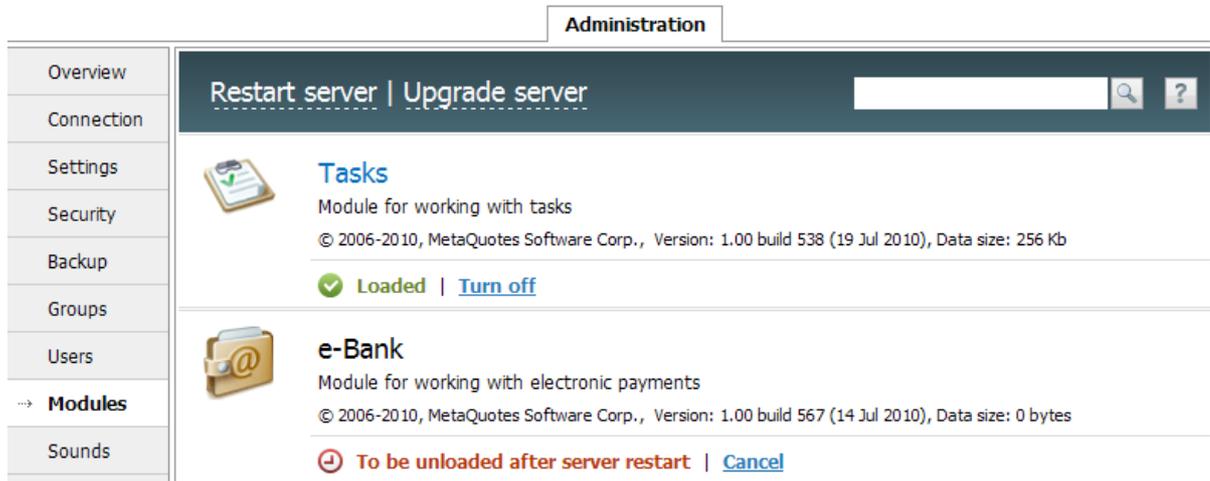
Domain: abccompany.tmwox.net
License: unlimited
Subscription: unlimited
Users: 7 of 10 (Groups: 2, Departments: 5)

Contact your customer's managers to get the accurate information of how many employees will work in TeamWox system. If it is more than the maximum number of users allowed by the current license, then it is necessary to expand the license (go to the partners' section at www.teamwox.com). The current and maximum number of users with the "Working" status is shown in the "Users" field. The table of the available types of licenses can be seen in the "Administration -> Browse" tab. [The current license](#) is shown in the grey line.

Configuration of Additional Modules

As the TeamWox system develops, its functionality will be extended with additional modules. Additional modules included to the standard system functionality will be downloaded automatically along

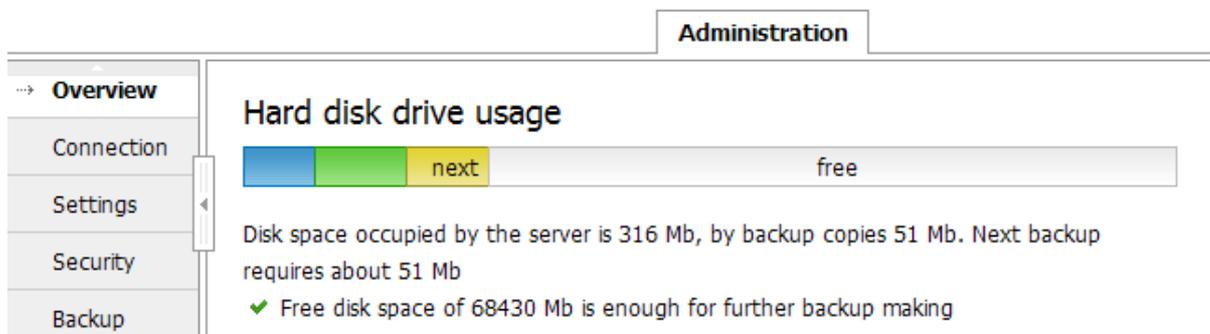
with the list of updates and installed by the server in the system. Your client may need to use an additional module, which is not included to the standard system package. It can be a custom module (created by you or any third party). In this case the module should be installed to the system manually by copying the module into the "/TeamWox/modules/" folder. All the installed modules will appear in the "Administration -> Modules" tab and will have the default status of "Not loaded".



To begin the work with an additional module, click "Enable" in front of the module name in the working area of the "Administration -> Modules" tab. Then restart the TeamWox server clicking the appropriate button in the Quick Command panel of the "Administration -> Modules" tab. The "Loaded" icon will indicate that the module has been turned on successfully. To complete the module configuration, you will need to [set groups/users permissions for it](#).

The Use of the Hard Drive

Go to the "Administration -> Browse" module, "Hard disk usage" section to check if there is free space on the hard disk of the server where the TeamWox system is installed. After the installation, the TeamWox system takes 70 Megabytes of hard disk, half of them is a database and search indexes. If work in TeamWox is very active, it is recommended to have more than 10 Gigabytes on the hard disk. This disk space will be useful to store the information that appears in the system.

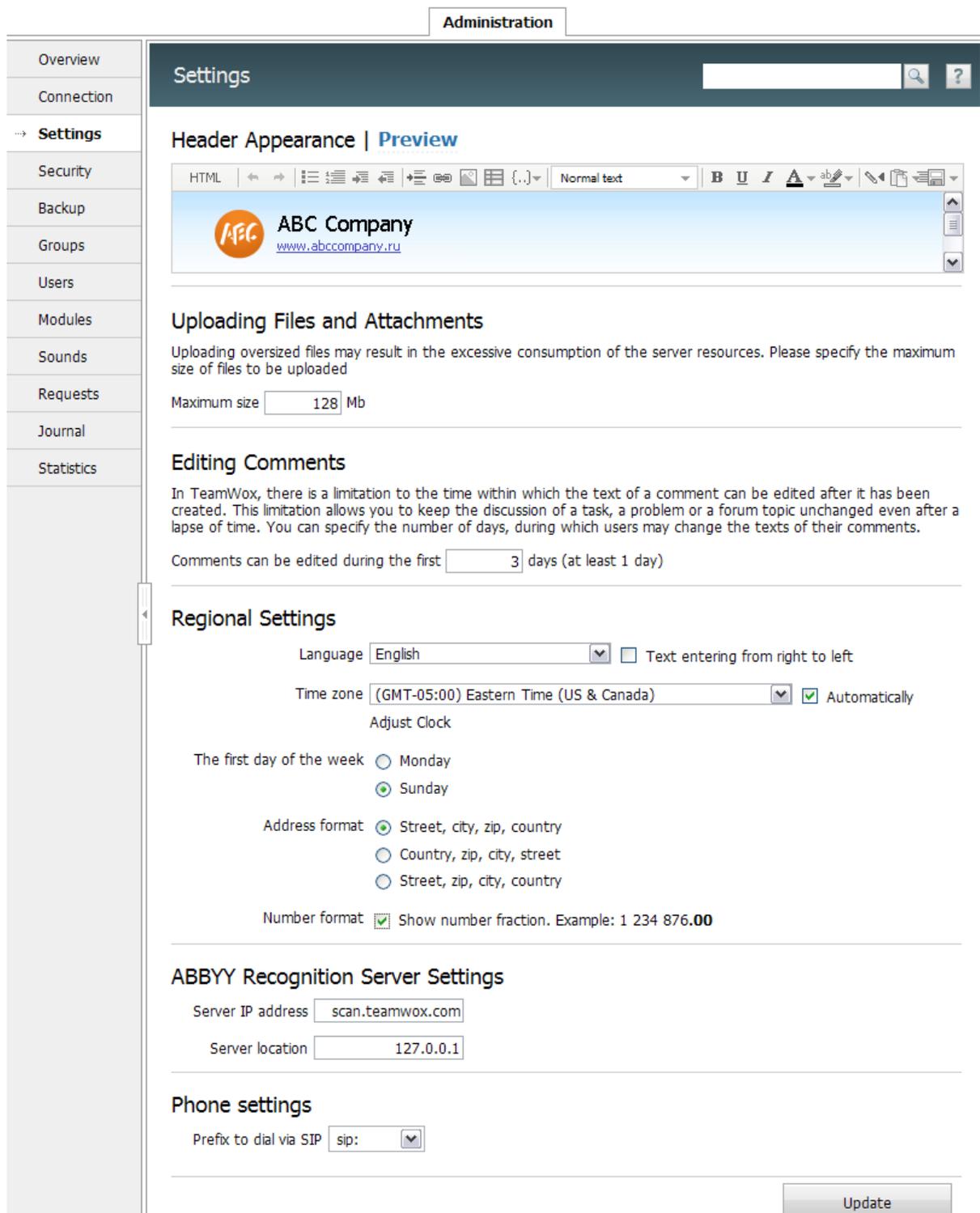


If the free space is not enough, a special notice will appear in this section. In that case it is necessary to increase the free disk space for the TeamWox server. It is important to provide enough free space on the disk for the stable work of the system.

After checking the general information about the system you can begin to configure TeamWox.

First of all, you need to set up the "Administration" module, in which the basic settings of TeamWox system are configured. This module is designed for administration of the TeamWox system and can be seen only by an administrator. Ordinary employees don't have access to the system administration. In this module, it is necessary to configure parameters in sections "Settings", "Security", "Backup", "Groups" and "Users".

This part of the guide is devoted to the general settings configuration of the server, which are made in the "Administration -> Settings" section.



The screenshot shows the "Administration" module's "Settings" page. On the left is a sidebar menu with options: Overview, Connection, Settings (selected), Security, Backup, Groups, Users, Modules, Sounds, Requests, Journal, and Statistics. The main content area is titled "Settings" and includes a search bar and a help icon. Below this is a "Header Appearance | Preview" section with a rich text editor showing a logo for "ABC Company" and the URL "www.abccompany.ru".

The next section is "Uploading Files and Attachments", which includes a warning about oversized files and a "Maximum size" input field set to "128 Mb".

The "Editing Comments" section explains the time limitation for editing comments and includes an input field set to "3" days.

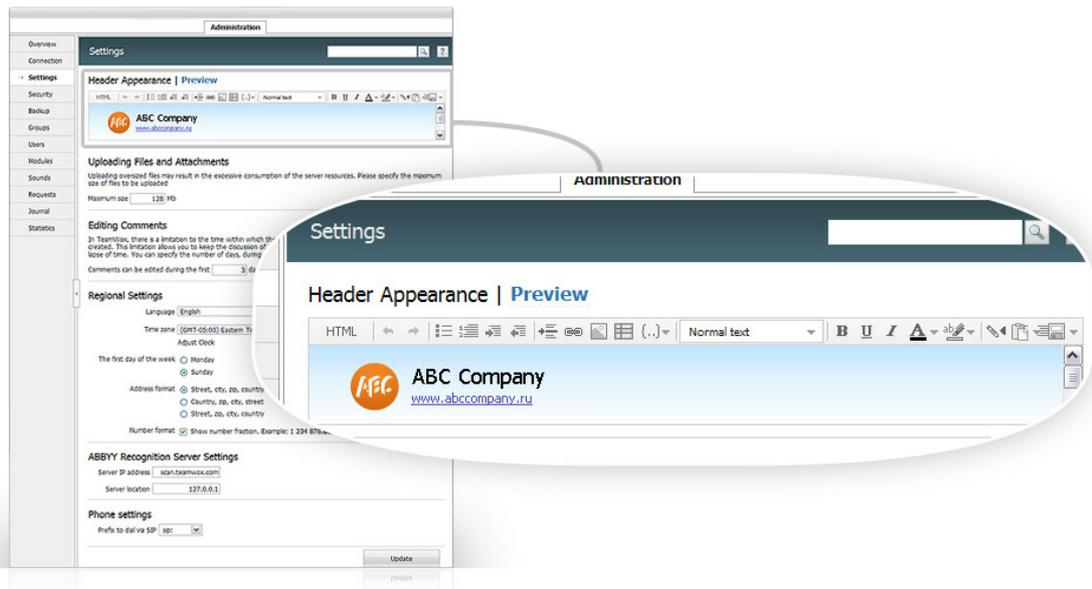
The "Regional Settings" section contains several options: Language (English), Text entering from right to left (unchecked), Time zone ((GMT-05:00) Eastern Time (US & Canada)), Automatically Adjust Clock (checked), The first day of the week (Sunday selected), Address format (Street, city, zip, country selected), and Number format (Show number fraction checked, example: 1 234 876.00).

The "ABBY Recognition Server Settings" section has input fields for "Server IP address" (scan.teamwox.com) and "Server location" (127.0.0.1).

The "Phone settings" section has a dropdown for "Prefix to dial via SIP" set to "sip:". An "Update" button is located at the bottom right of the settings area.

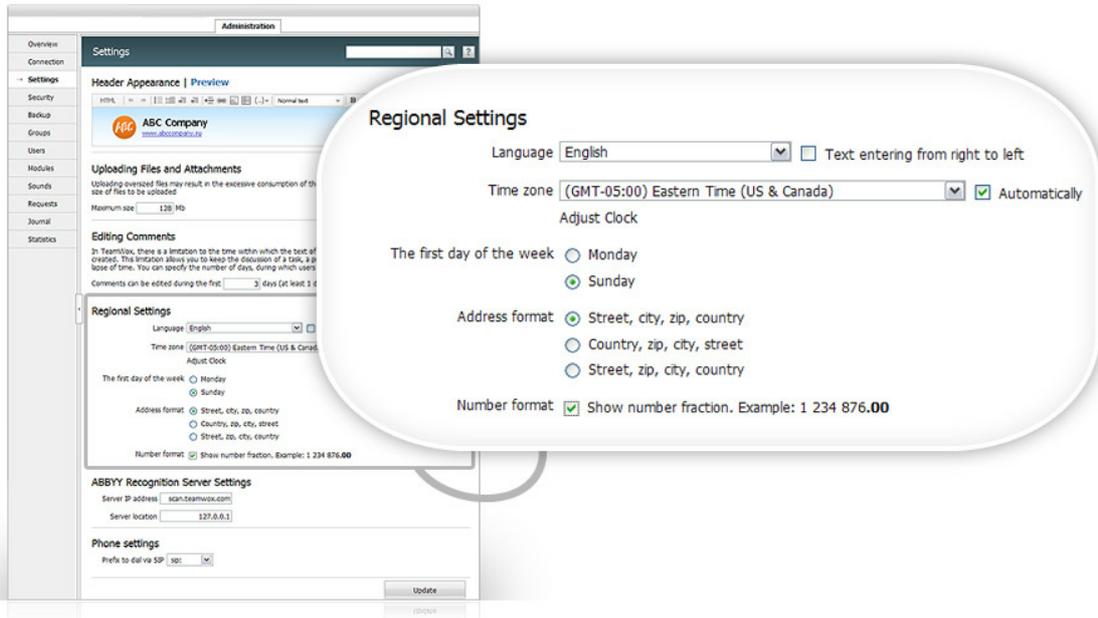
In this section, it is necessary to configure the appearance of the heading, set the local settings: language, time, first day of the week and address format. If the company uses an IP softphone, it should be set up here too.

Enter the "Administration" module and choose the "Settings" tab on the navigation panel on the left. In the upper part of the working area configure the heading of the system. This information will be seen by all the users of the TeamWox system. With the help of the installed editing program you can add a picture (company logotype), text (name of the company), link to the corporate website. It is also possible to edit the heading in HTML. Then press the "Preview" button for the heading to be shown in the upper left corner of the window.



To save the heading, press the "Update" button at the bottom of the working area of the "Administration -> Settings" tab.

After editing the header, change the local settings of the TeamWox server:



1. Language

In the "Language" field mark the most common language of communication among the employees of your customer. It will be set by default for the user interface of TeamWox, and the interface will be in this language when one logs into the system for the first time. Later every user can change the language of the system for the one which is comfortable for him/her. While making settings it is possible to choose one of the 23 world languages.

Attention: It is recommended that you choose the language used by most of the company employees as the default language. This will increase friendliness of the TeamWox interface and will make the configuration easier. For other employees (foreign employees) it is necessary to set the languages in their profiles manually.

If necessary it is possible to change the direction of text input via the option "Text input from right to left" - it is an indispensable condition for Arabic.

2. Time zone

Choose Greenwich time zone in which the company employees work. For example, for Moscow it will be "GMT +03:00", for Vladivostok - "GMT +10:00". The system time will be set up according to this time zone for a more comfortable work. For example, the logs of TeamWox events will be traced by it ("Administration -> Journal").

Attention: The "Automatic set up" of time zone is chosen by default for users (the time zone that will be set up is the one, which was chosen on a user's computer), one can change this option in users' profiles settings.

For some countries it can be necessary to tick the "Automatic Daylight Saving Time correction" field. It has to be done for automatic time correction by one hour forward on the last Sunday of March (for Russia and Europe) and one hour back on the last Sunday of October.

3. The first day of the week

In the "First day of the week" field choose the day, with which a week begins, by ticking an appropriate variant: "Monday" or "Sunday". It provides the comfortable work with dates and calendar in TeamWox.

4. Address format

In the "Address format" field choose one of the two available variants of displaying the addresses (of organisations, employees, etc.) in the system: "Street, City, ZIP Code, Country" or "Country, ZIP Code, City, Street". After that all addresses in profiles of users, organizations and contacts will be shown according to the selected format.

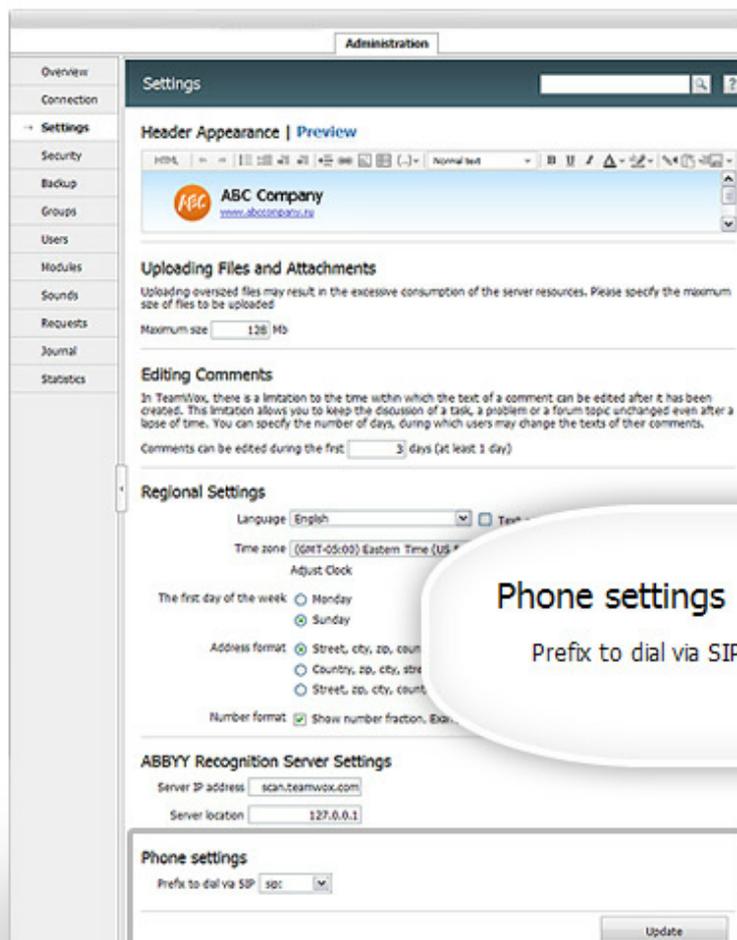
5. Display of fractional part of numbers

Tick the "Show the fractional part" field, if it is important for users to see the fractional parts of numbers (for example, to see the salary or prices in "Products" and "Accounting" modules). In this case the TeamWox system will show fractional parts of numbers within two signs.

To save changes in the local settings, press the "Update" button at the bottom of working area.

Phone Settings

If the company uses IP-softphone, fill in the "Phone settings" block at the bottom of the working area of the "Administration -> Settings" tab.



In the "Prefix to dial via SIP" box choose a general prefix (the most often used one) for dialling numbers while calling via the softphone. According to the softphones used, prefixes can look differently. For example, "sip:", "callto://", "sip:810", "callto://810" (where 810 is the country code). For the configuration of calls via Skype, it is necessary to indicate the prefix "skype:". To accept the changes in the "Settings" tab, press the "Update" button.

In order to be able to call via a softphone, a user should be given an appropriate permission ([while setting up his/her profile](#)) and it is necessary to indicate an individual prefix according to the type of his/her softphone. This prefix will be added to all numbers while making calls. If the individual prefix is not indicated, then the general prefix will be used while calling. Naturally, a softphone must be installed on a user's working place, so that the user can make calls.

The security system is configured in the "Administration -> Security" tab. In this group of settings of the TeamWox system, it is necessary to make the binding of users to IP-addresses, authentication in Active Directory domain and by SSL certificates. You can also configure here the connection through a proxy server.

Administration

- Overview
- Connection
- Settings
- **Security**
- Backup
- Groups
- Users
- Modules
- Sounds
- Requests
- Journal
- Statistics

Security

SSL digital certificate



Issuer: **MetaQuotes Software CA** (Download the [MetaQuotes Software CA](#) certificate)

Domain: **abccompany.tmwox.net** expires **2022.07.26**

- [Change certificate](#)
- [Request certificate](#)
- [Export the certificate](#)

Security for passwords and working sessions

To provide the system security, we implemented a fixed password complexity control. Any password must contain no less than 6 characters including lower-case, upper-case letters and numeric characters.

Set the control of working sessions by IP addresses.

Authentication

Authentication in Active Directory

Domain ad.company.com

Use client certificates

Check by

Certificate trust authority list:

abccompany.tmwox.net (from license, issued by MetaQuotes Software CA)

1.

Proxy server

The operation of the update service and the access of modules to external resources may require setting up of connection via a proxy server.

Use a proxy server proxy.company.com:3128

Login Password

Processing of public requests

Unauthorized (public) connection with TeamWox is used for the integration of the Service Desk and Chat with external web resources.

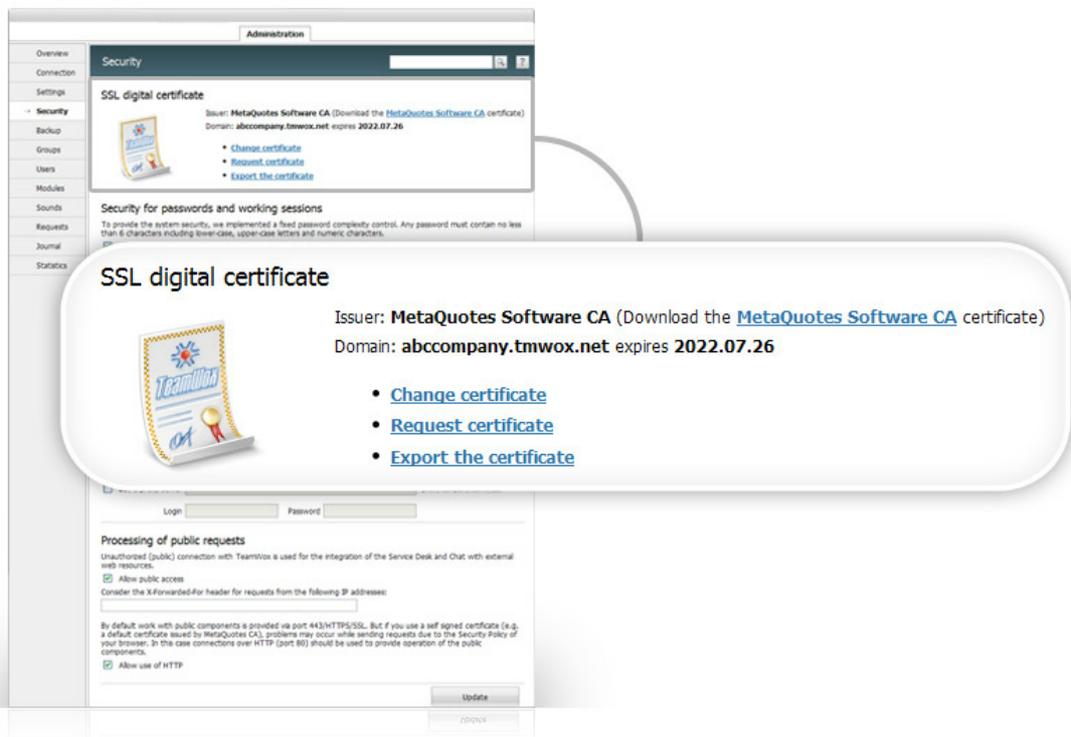
Allow public access

Consider the X-Forwarded-For header for requests from the following IP addresses:

By default work with public components is provided via port 443/HTTPS/SSL. But if you use a self signed certificate (e.g. a default certificate issued by MetaQuotes CA), problems may occur while sending requests due to the Security Policy of your browser. In this case connections over HTTP (port 80) should be used to provide operation of the public components.

Allow use of HTTP

To configure the security of the TeamWox system, open "Administration -> Security". The upper part of the working area contains a section with information about the digital SSL certificate that is used.



Secure Sockets Layer (SSL) is a cryptographic protocol which provides privacy of data exchange between a client and a server. An SSL-certificate is 256-bytes key, with the help of which the safe connection between the TeamWox server and a client (system user) is provided. The use of the SSL-certificate stipulates the use of the "https://" prefix before the server address. Such certificates are issued by certification authorities (CA).

TeamWox works only over secure connections using the SSL encryption. This means that no one can catch and read information that is transmitted. The TeamWox server uses the default digital certificate MetaQuotes Software CA by the certification centre of MetaQuotes Software Corp., the TeamWox system developer. It is supplied with the license for the TeamWox server for a term till 2022. It is a qualitative and fullfunctional certificate, the only thing is that it is given by the unauthorized certification authority MetaQuotes Software CA, which is not known by browsers. That's why they don't trust it and show warning messages. But this certificate can be used without any dangers, it has no difference from other certificates, which are more popular.

Entering the system for the first time you get a message from the SSL security service about the error that appeared while trying to create a safe connection with the TeamWox system domain because of usage of a certificate from an unauthorised centre. In that case you can accept it by your web-browser as an exception and make it an authorised centre or you can install a special file [metaquotesrootca.cer](#) (root certificate from MetaQuotes Software CA). After downloading the certificate (file), place it to the storage for certificates named "Authorised root certification authorities". Certificate storages are the area of the system made for storing certificates.

It is necessary to add the SSL-certificate to the web-browser or install a special file for each system user. Later you can change SSL-certificate by MetaQuotes Software CA for your own SSL-certificate which can be bought in authorised certification authorities. Then browsers will stop sending warnings.

Attention: if during the first authorisation a user accepted SSL-certificate by MetaQuotes Software CA as authorised, his/her browser won't send warnings about use of unauthorised certificate in the future. This means that it is possible to continue using this certificate without any problems.

In the upper part of certificates section in "Administration -> Security" tab there is information about the certificate which is used now: issuance centre, recipient and expire date. If necessary, it is possible to change the certificate or ask for a new one right through the TeamWox system. There are additional buttons shown in the window for this purpose:

- **Change the certificate.** If customer's company already uses its own SSL-certificates, change the certificate by MetaQuotes Software CA to the one they use (*.pfx). To do it one has to press the "Change the certificate" button. In the window that will open after that, indicate the path to the certificate file with *.pfx extinction, feeding the password if necessary, and press "Download" button. Certificate will be changed.
- **Request certificate.** With the help of this button it is possible to generate a request for a new certificate in one of authorised certification centres. After you press the button the window opens where you need to fill correctly all the fields about customer's company, and then press the "Next" button. A window with grey text will appear, this is a text format of a request and CSR (Certificate Signing Request) answers, you exchange them with certification centre. Copy absolutely all text from grey window and close the window by pressing the "Close" button. Also save the request in a separate text file just in case. Then open the web-site of authorised certificate centre and fill the SSL-certificate purchase form where you need to input the text that you copied (CSR). After you pay the bill, you'll receive a generated SSL-certificate by e-mail that you specified. Return to TeamWox system "Administration -> Security" tab and finish the installation of the received certificate with the help of "Use the response of a certificate authority" button. The whole procedure will take several hours and some money (you'll need \$259 for a certificate for two years on [Thawte Inc.](#) or about \$140 on [Comodo](#)).
If any questions remained, please, read [step-by-step guide of receiving of SSL-certificate](#).
- **Export the certificate.** With the help of this button it is possible to export the certificate that is used to pfx-file. After pressing the button you need to enter the password that will protect the certificate. Received certificate PFX-file can be used in other programs (for example, web-servers).

Entering the TeamWox system, each user needs to enter a unique login and password. The permanent control of passwords complicity works to provide security for TeamWox.

Attention: Each password must contain not less than 6 characters including lower and upper case letters and digits. All symbols are available: digits, letters, spaces, double quotes, etc.

It is possible to establish control of working sessions by IP addresses in the "Security of passwords and working sessions" section by ticking an appropriate field.



Security for passwords and working sessions

To provide the system security, we implemented a fixed password complexity control. Any password must contain no less than 6 characters including lower-case, upper-case letters and numeric characters.

Set the control of working sessions by IP addresses.

Proxy server

The operation of the update service and the access of modules to external resources may require setting up of connection via a proxy server.

Use a proxy server

Login

Password

Processing of public requests

Unauthorized (public) connection with TeamWox is used for the integration of the Service Desk and Chat with external web resources.

Allow public access

Consider the X-Forwarded-For header for requests from the following IP addresses:

By default work with public components is provided via port 443/HTTPS/SSL. But if you use a self signed certificate (e.g. a default certificate issued by MetaQuotes CA), problems may occur while sending requests due to the Security Policy of your browser. In the case connections over HTTP (port 80) should be used to provide operation of the public components.

Allow use of HTTP

Update

Cancel

In this case the system will exercise dynamic control of users' working sessions. TeamWox will trace the IP-addresses, from which users connect. If during a working session the user's IP-address changes, the system will close this session. It will increase the TeamWox system security but limit the access to the system partly. For example, users won't be able to work with TeamWox via mobile platforms with permanent change of access points.

Users' authentication is performed each time when a user logs in to the TeamWox system. The system performs a unique identification and the user gets an access to the system or a polite refusal. There are three types of users' authentication in TeamWox.

Authentication by Login

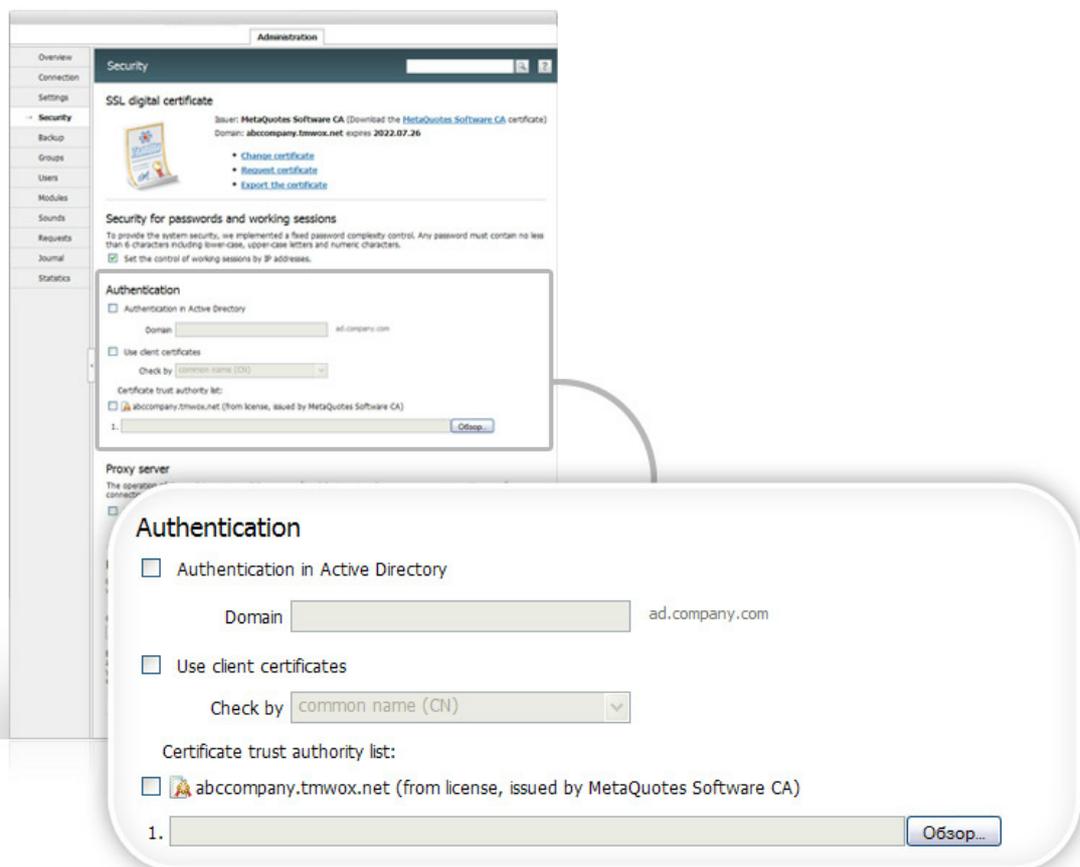
It has a low security level and is used by the system by default. To get and access to the TeamWox system, one has to enter his/her unique name (login) and password. Login and passwords are given at the stage of [adding of users to the TeamWox system](#).

Authentication in the Active Directory Domain

This authorisation type is used along with authentication by login. Active Directory is an intellectual service of Microsoft corporation directories. It has a hierarchical structure with the following objects: resources (for example, printers), services (for example, e-mail) and people (users' and groups' accounts). Active Directory provides information about objects, helps to organize them, to control access to them and establishes security rules.

To authenticate in domain, tick the "Active Directory" field and in the "Domain" field enter the domain name, for example: "ad.clients_company.com". As a result, users can enter TeamWox with the login and password that were registered for them in Active Directory. To save changes, press "Update" at the bottom of the working area of the "Administration -> Security" tab.

Authentication by a Client Certificate



Use of client certificates is an additional method for increasing the security level. This is the highest security level, the bank account has the same. If this one is used, then authentication by login and authentication in Active Directory domain may not be used at all. In order for a user to get an access to the TeamWox system, he/she needs to have a personal client certificate, the pattern of which is saved in the TeamWox system. A client certificate is a kind of a carrier with unique authentication information, for example, smart-card, USB-token, etc. Every time while doing authentication the user is asked for authentication information, which is compared with a standard. A conclusion about the user's authenticity is based on this comparison and he/she is allowed or forbidden to access to the system.

Attention: For users' authentication by the client certificate, it is recommended to use a server based on the following OS: MS Windows Vista, Seven or Server 2008.

The Use of Existing Certificates

If the company employees already use client certificates, it's necessary to configure the TeamWox system for work with them. With the help of them users can also enter TeamWox. To do it, go to the "[Administration -> Security](#)" tab and:

- in the "Authentication" section tick "Use client certificates";
- depending on the certification centre settings in the "Check by" field choose one of the two variants of the certificate field, according to which the authentication will be performed: "by main name" or "by mail address". So, in the first case there will be a comparison of the main name in the certificate and user's login in TeamWox. In the second case the e-mail address shown in the certificate will be compared with the address shown in user's contacts.
"By personal certificate" is used if client certificates [are generated by the TeamWox server](#);
- put off a tick in "yourcompany.tmwox.ru (from the license issued by MetaQuotes Software CA)";
- with the help of the "Browse" button, add to the system the public part of the security certificate (*.cer, *.cr or *.crt file) of certification authority, which is used for issuance of client certificates;
- press "Update" to finish the setup of authentication by client certificates.

After it users can log in to the system using their old certificates.

Creation of User Certificates

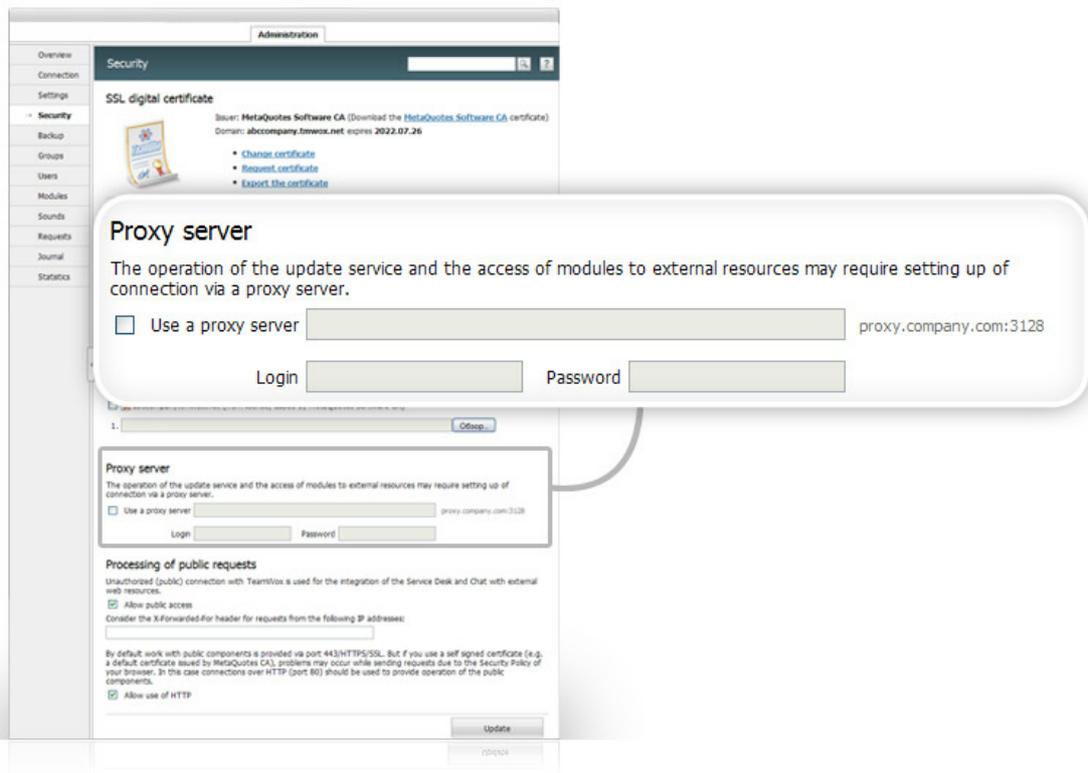
TeamWox can play a role of a certification authority itself. It can generate and issue client certificates to its users itself. If the customer's company needs a high security level, it is necessary to make the appropriate settings of the TeamWox server and generate client certificates for each user. To do it, in the "[Administration -> Security](#)" tab:

- tick "Use client certification" in "Authentication";
- in "Check by" choose the variant "by personal certificate". In that case authentication will be done by client certificates generated by the TeamWox system;
- tick the field "yourcompany.tmwox.ru (from the license issued by MetaQuotes Software CA)". This license will be used as a public part of the security certificate, generated by TeamWox for its users;
- delete from the system all the public parts of security certificates (*.cer, *.cr or *.crt file) from other certification authorities if they were added earlier. To do it, press the "Delete" button to the right of the file name;

- press "Update" to finish the setup of authentication by client certificates;
- moreover, you need to generate certificates for each user personally. It should be done during [configuration of users' profiles](#).

After the server configuration it is necessary to [set up access rights for each user/users group](#) according to the authentication type. These rights are given after [creation of company structure](#) and [configuration of users' list in the TeamWox system](#).

If the TeamWox server connects to the Internet via a proxy server, it is necessary to set up appropriate parameters in "Administration -> Security" in "Proxy server" section.



To do it:

- tick "Use a proxy server";
- indicate the server address and port separating them with a colon. For example, "proxy.clients-company.ru:3128";
- enter a login and password for authorization on the proxy server. If login and password are unnecessary, leave these fields empty.

To accept the changes, press the "Update" button. So, the TeamWox server will connect to external resources with the help of the proxy server that was indicated.

Now it is necessary to build up a company structure in the TeamWox system. To do it, you need to study the customer's company structure and formalize it. In TeamWox, create the company departments and functional groups according to the results you got. These settings are configured in the "Administration -> Groups" tab.

Administration

<ul style="list-style-type: none"> Overview Connection Settings Security Backup → Groups Users Modules Sounds Requests Journal Statistics 	<div style="background-color: #2c4e64; color: white; padding: 5px; border: 1px solid #ccc;"> Add Group Hierarchy <input type="text"/> ⌵ 🔍 ? </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="width: 5%;"></th> <th style="width: 45%;">Name</th> <th style="width: 25%;">Manager</th> <th style="width: 10%;">Users</th> <th style="width: 15%;">Description</th> </tr> </thead> <tbody> <tr> <td></td> <td>ABC Company</td> <td>John Smith</td> <td>1</td> <td></td> </tr> <tr> <td></td> <td>Accountants</td> <td>Almaz Minaev</td> <td>1</td> <td></td> </tr> <tr> <td></td> <td>International relations Department</td> <td>Alena Grushova</td> <td>2</td> <td>Interaction with foreign organizations</td> </tr> <tr> <td></td> <td>Marketing Department</td> <td>Antonina Vorobey</td> <td>2</td> <td></td> </tr> <tr> <td></td> <td>Sales Department</td> <td>Andrey Pozharov</td> <td>4</td> <td>Promotion, maintenance contracts</td> </tr> <tr> <td></td> <td>TechSupport</td> <td>АНТОН Писарев</td> <td>3</td> <td></td> </tr> <tr> <td></td> <td>Administrators</td> <td></td> <td>1</td> <td>Built-in administration group</td> </tr> <tr> <td></td> <td>Everyone</td> <td></td> <td>16</td> <td>Built-in group containing all users</td> </tr> <tr> <td></td> <td>I like a football</td> <td></td> <td>6</td> <td>For the players and fans of football</td> </tr> <tr> <td></td> <td>Топ-Management</td> <td></td> <td>0</td> <td></td> </tr> </tbody> </table> <div style="text-align: right; font-size: 0.8em; margin-top: 5px;">1 ... 10 → 10</div>		Name	Manager	Users	Description		ABC Company	John Smith	1			Accountants	Almaz Minaev	1			International relations Department	Alena Grushova	2	Interaction with foreign organizations		Marketing Department	Antonina Vorobey	2			Sales Department	Andrey Pozharov	4	Promotion, maintenance contracts		TechSupport	АНТОН Писарев	3			Administrators		1	Built-in administration group		Everyone		16	Built-in group containing all users		I like a football		6	For the players and fans of football		Топ-Management		0	
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	Топ-Management		0																																																					

Analysis

On this stage you need to understand how the company management is performed and which structure units the management hierarchy has: departments, business units, branches, etc.

Set departments (structure units) of the company. Specify the name, a manager's full name, location (office, building, room), parent department, briefly describe department functions for each department. Along with departments, which are strictly referred to the company structure, you also need to study functional groups existing in the company. They can be: shareholders, senior managers, middle managers, project groups, new employees, outsourcers, etc. These groups help to properly set access rights to the TeamWox functions and company internal documents.

Functional groups make it possible to unite users by interests. For example, group of middle managers or group of football fans among company employees. Members of these groups will be able to exchange any information privately, create group files with documents, etc.

After formalizing of information about company departments and functional groups you can start building up a structure in TeamWox.

It is necessary to create company departments and functional groups in TeamWox according to the results obtained at the analysis stage. Enter the "Administration -> Groups" tab module. Here you can manage groups and departments in the TeamWox system.

Administration

Add Group Hierarchy	Name	Manager	Users	Description
 ABC Company	John Smith	1		
 Accountants	Almaz Minaev	1		
 International relations Department	Alena Grushova	2	Interaction with foreign organizations	
 Marketing Department	Antonina Vorobey	2		
 Sales Department	Andrey Pozharov	4	Promotion, maintenance contracts	
 TechSupport	Антон Писарев	3		
 Administrators		1	Built-in administration group	
 Everyone		16	Built-in group containing all users	
 I like a football		6	For the players and fans of football	
 Top-Management		0		

1 ... 10 → 10

Groups and departments in the TeamWox system are similar in many things. Departments differ from groups by possessing a parent department and a manager. In addition, information about departments is shown while viewing the company structure in the "Team" module. And the other way, groups don't have managers and parent departments, they are not shown in the company structure. But at the same time, they allow to control the rights of several employees included into that groups at one time. With the help of groups, it's convenient to configure access to [corporate e-mail boxes](#), [documents](#) or [organizations](#). For example, it's possible to unite within one group all football fans and [create a private board category for them to communicate](#).

Initially TeamWox has two functional groups - "Administrators" and "Everyone". Users that are in "Administrators" group have the full access to the system and can configure any settings. All created users are automatically added to the "Everyone" group and it's impossible to edit its content. The "Everyone" group makes it easier to set up access rights for the system users. It allows to give minimum rights to all new users automatically, so that they can enter the system and start working with it. In addition it's possible to use the "Everyone" group while setting up the access to some certain system resource (board, document, task) for all users at one time or while configuring users' authentication, [for example, only by login](#).

Creating Departments

Create and arrange departments from the highest to the lowest according to the management hierarchy. To do it, click "Add a group". A window of group or department adding will appear:

Administration

→ Identification

[Back to list](#)

🔍 ?

Name:

Status: Company department

Manager:

Parent department:

Location:

Description:

There it is necessary to do the following:

1. **Name** - enter the name of the department or group.
2. **Status** - with the help of the list choose the "Working" status (the department is working now).
You also can hide, delete or disable a created group or department by changing the status to "Deleted" (group/department and all dependent data will be deleted from the TeamWox system completely without any restoration ability); "Disabled" (group/department will be disabled in the system, all data will be stored in the system but will be inaccessible for users); "Hidden" (group/department will be inaccessible in setting lists and company structure). With the help of hidden groups/departments it is possible to set access rights massively.

Attention: If it is necessary to delete a group (choose the "Deleted" status), you will need to delete subordinate departments first (they can be seen in the "Team -> Hierarchy" tab), delete all users from this group (they can be seen in the ["Users" tab of the department/group profile](#)), set "Not chosen" in the "Department manager" field. It's impossible to delete a group without doing all these operations.

3. **Company department** - tick this field if you want to create a department. If you don't tick it, not a department but a functional group will be created. Groups are not shown in the company hierarchy and in the "Team" module.
4. **Manager** - first set the "Not chosen" field.
After [creating of users](#), you need to enter the control part of each department and set the manager manually by choosing a user from the offered list. These actions will be [described in details later](#). You either won't need to fill this field in the future (leave "Not chosen") if not a department but a group is created.
5. **Parent department** - in the company hierarchy choose a parent department from the list. If there is no parent department, tick "Not chosen". In that case the department will be on the highest hierarchy level and will be subordinate to the company director. You won't need to fill in this field

in the future (leave "Not chosen") if not a department but a group is created.

6. **Location** - specify the location of the department or of department manager's working place (office, building, room - information can be entered in a free form). This field helps system users to get information about the location of the department or its employees in the "Team -> Structure" section. While creating a group, you may leave this field empty, this information can be edited later.
7. **Description** - write here a short description of the department functions, which will be indicated in an appropriate column in the "Administration -> Groups" tab. The description appears also in the department tooltips in "Team -> Structure".

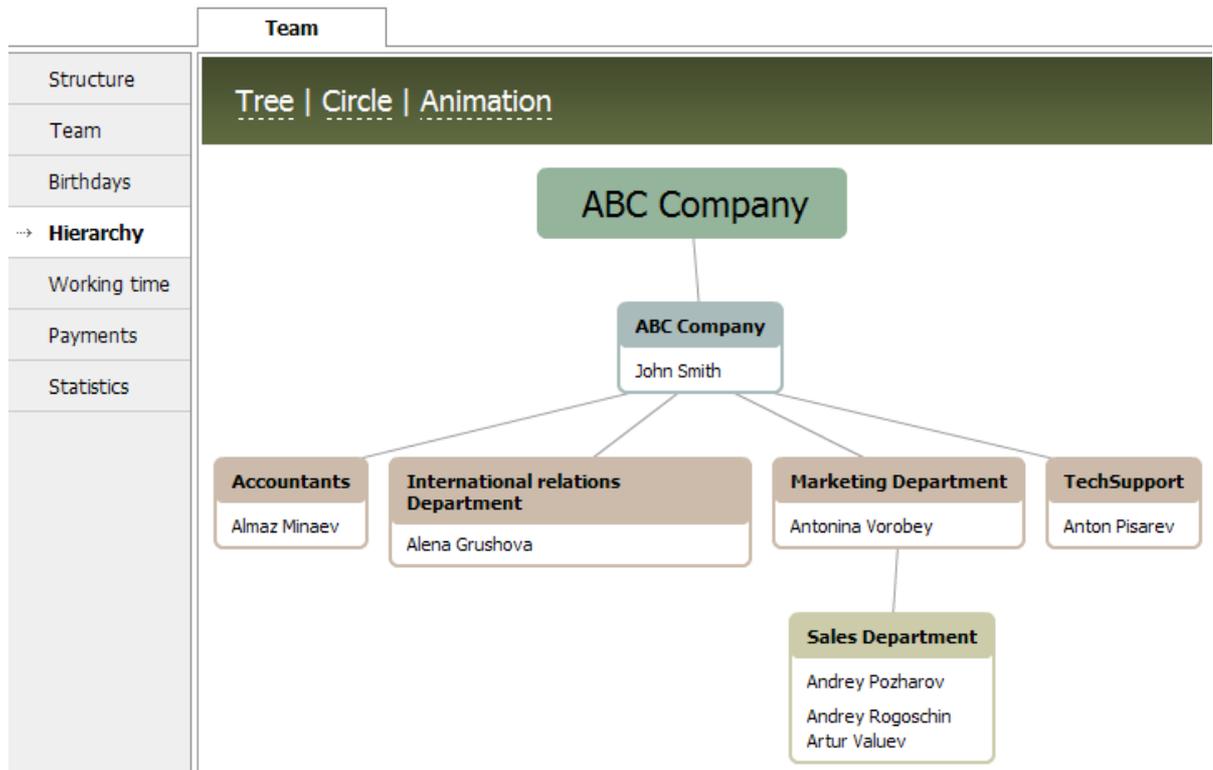
After filling in all the fields press the "Add" button and the department will be created in the TeamWox system, and additional tabs such as "Permissions" and "Users" will appear in the navigation. Now you don't need to fill them. You can cancel department creation with the help of the "Cancel" button or by clicking "To the list". The input data won't be saved and you will return to the list of groups.

Step by step, create all the departments of the customer's company in the TeamWox system.

Creating Groups

With the help of the "Add a group" button in "Administration -> Groups", create functional groups according to the analysis of the company structure. Group creating is the same as department creating, and you need to do only 1, 2, 6 (optional) and 7 stages as it was [described above](#). Do not tick "Company department" field, otherwise a department will be created and not a group. To create a group, press "Add". Do the same operations for all company groups.

To check that the structure was created properly, click "Hierarchy" in "Administration -> Groups". An interactive diagram that shows all the company departments will appear on the screen. A circle diagram for users quick search will be opened by default. It can't be used for checking the correctness of hierarchy, and it's better to use a treelike diagram (the "Tree" button on the Quick Command panel). After you press on the element, it appears in the centre and its connections up to director are highlighted with bold lines. This diagram can be moved with the help of a mouse (Drag'n'Drop).



- Check the number of departments. Add [missing departments](#) if necessary.
- Check the department subordination. Correct any mistakes if the hierarchy was broken.
- Correct information about departments if necessary.

To edit information about a department, it's necessary to return to "Administration -> Groups" tab and choose a department you need by pressing on its name. Make necessary corrections and press "Update" button. To return to groups/departments list, press "To the list" button on Quick Command panel.

Check correctness of information about created groups. To do it, open departments/groups list in "Administration -> Groups" tab where groups are listed after departments and are marked with  icon.

Administration

Overview	Add Group Hierarchy			
Connection				<input type="text"/> 🔍 ?
Settings	Name	Manager	Users	Description
Security	 ABC Company	John Smith	1	
Backup	 Accountants	Almaz Minaev	1	
→ Groups	 International relations Department	Alena Grushova	2	Interaction with foreign organizations
Users	 Marketing Department	Antonina Vorobey	2	
Modules	 Sales Department	Andrey Pozharov	4	Promotion, maintenance contracts
Sounds	 TechSupport	Антон Писарев	3	
Requests	 Administrators		1	Built-in administration group
Journal	 Everyone		16	Built-in group containing all users
Statistics	 I like a football		6	For the players and fans of football
	 Top-Management		0	

1 ... 10 → 10

Correct group name and its description if necessary. Group editing is the same as department editing which was described above. Create [additional groups](#) if necessary.

After building the company structure in TeamWox, configure its list of users: add users to the system, configure their profiles, link users with departments and groups.

Administration				
Overview	Add Import Export			
Connection				
Settings				
Security				
Backup				
Groups				
→ Users				
Modules				
Sounds				
Requests				
Journal				
Statistics				
	Login	Full name	Department	Position
	Alena Grushova	Alena Grushova	International relations Department	Manager
	Almaz Minaev	Almaz Minaev	Accountants	Accountant
	Andrey Pozharov	Andrey Pozharov	Sales Department	Sales manager
	Andrey Rogozhin	Andrey Rogozhin	Sales Department	Sales manager
	Anton Pisarev	Anton Pisarev	TechSupport	Technical Support
	Antonina Vorobey	Antonina Vorobey	Marketing Department	PR manager
	Artem Korneev	Artem Korneev	ABC Company	CEO
	Artur Valuev	Artur Valuev	Sales Department	Sales manager
	John Smith	John Smith		Administrator TeamWox

The number of users of the TeamWox system can't be larger than it's allowed by the current license. It's possible to see the information about the current license in the "Administration -> Overview" tab.

Administration	
→ Overview	ABC Company Restart server
Connection	
Settings	
Security	
Backup	
Groups	
Users	
Modules	
Sounds	
Requests	
Journal	
Statistics	

TeamWox® 1.00 build 993 (23 Jul 2010)

Domain: abccompany.tmwox.net

License: unlimited

Subscription: unlimited

Users: 1 of 10 (Groups: 2, Departments: 5)

TeamWox Support 

Upgrade Your License!

The number of users in your system is nearing the maximal allowed total number for your license. Buy the extended system version to easily add more new employees to your TeamWox. Read details at www.teamwox.com

Users	Price	Subscription	Price currency USD
10	free	free*	Current version
25	3 400	675	Buy
50	6 700	1 350	Buy
unlimited	10 000	2 000	Buy

All possible types of licenses are shown in the table, where the current license is highlighted with grey. In "Users" column the maximum allowed number of users with the "Working" status is shown (don't confuse with the number of connected at one time users). At the same time, in the system there can be an unlimited number of users with other statuses (switched off, discharged, etc.). The current number of users with the "Working" status in the system is shown in the "Users" field in the upper part of the working area in the "Administration -> Overview" tab.

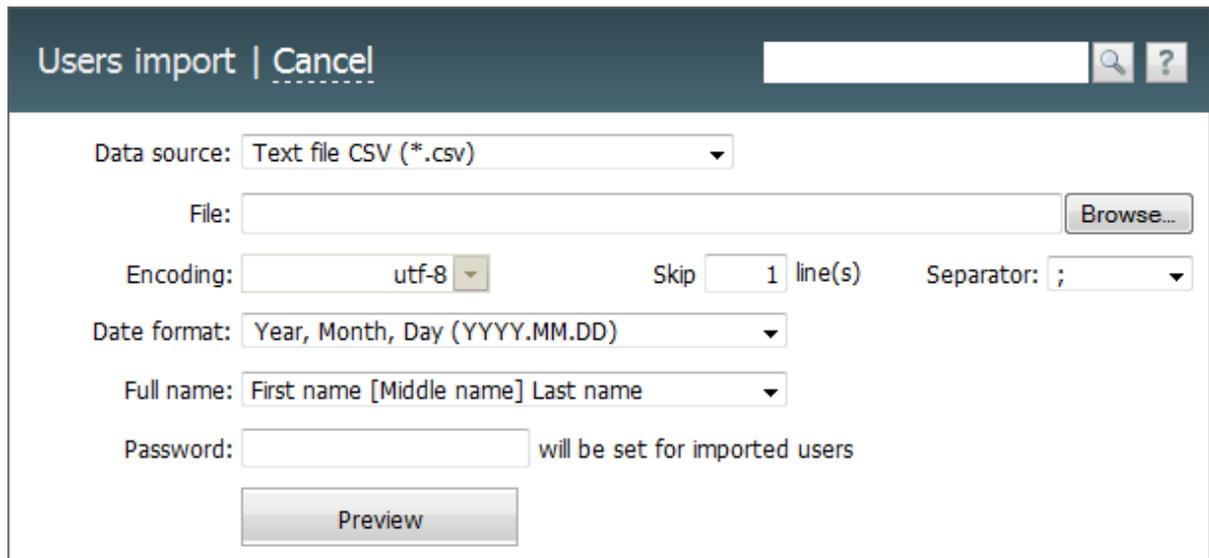
Before configuring the list of users', ask the Personnel Department for the information about the company employees: private and contact details of each user, their photos, positions featuring their

departments. It will help you to create in TeamWox accounts for all the company users, add information to users' profiles and link users to departments.

You need to add users to the TeamWox system. To do it you can import an existing list of users from a text file (*.csv) or from the Active Directory. It is done automatically and allows to create company employees' accounts in system. If there is no possibility to import the list automatically, it's necessary to add new users manually by giving them an appropriate login and password.

Import Users from a Text CSV File

To begin importing users from a text file (*.csv), press the "Import" button on the Quick Command panel of the "Administration -> Users" tab. The import window will appear:



- **Data source** - choose "text file CSV" data format. Only *.CSV files are maintained at the moment. Other formats will be added in the future.
- **File** - with the help of the "Browse" button choose a file from this field, from which the data will be imported.
- **Encoding** - choose an appropriate encoding of the imported file. If the encoding is chosen correctly, the information will be shown correctly after clicking "Preview". Otherwise, one will need to choose another code and check the correctness again by clicking "Preview".
- **Line** - find the line, from which users data begins in the imported file, indicate the number of this line in the file. There can appear a situation when first lines of the file contain the file name and description, then goes the line with column names and in the following lines there are imported data. In that case for making the work more comfortable it's necessary to choose the number of the line that contains the column names. They will be shown while viewing information from the file.
- **Separator** - indicate a separator, which will divide different data about users in the file (comma, semi or tabulation sign).
- **Date format** - choose the date format in the imported file. Available variants: "Year, Month, Day (YYYY, MM, DD)", "Day, Month, Year (DD, MM, YYYY)" or "Month, Day, Year (MM.DD.YYYY)".
- **Full name** - indicate users' name format in this field. It's required for correct the recognition and writing of users' information into the TeamWox system. Available variants: "Name Surname" or "Surname Name".
- **Password** - if in imported data password for each user wasn't chosen, it's necessary to indicate one common password for all users in this field. This password will be given to each of imported users.

Later it'll be possible to change it individually for each account [while setting users' profiles](#). If information about the passwords is imported from a file, this field has to be left empty.

Attention: Each password must contain not less than 6 characters including lower and upper case letters and digits. All characters are available: digits, letters, spaces, double quotes, etc.

After entering all the necessary data, press the "Preview" button. In the lower part of the window, information from the imported file appears. If the recognition of information was done incorrectly, change the import settings and press the "Preview" button again.

Match fields and press 'Done'				
	Login	Name	Surname	-- Not selected --
	Login	Name	Surname	Department
2	John	John	Smith	Directors
3	Joe	Joe	Black	Marketing
4	Alice	Alice	Wilson	Support
			Done	Cancel

After checking the data correctness, it's necessary to associate the imported file columns with the TeamWox system fields. You'll see a field above each column, choose an appropriate point in that field. Not associated columns (above which "Not chosen" is indicated) won't be imported. For each imported entry a special account is created in TeamWox, that's why the fields "Login", "Full name" and "Password" (private or common) are required. If these fields are empty, accounts won't be imported.

Check all the data again and if everything is OK, press "Done". After that accounts will be imported to the system and you can go [to the next step](#).

Import from the Active Directory

For importing accounts from the Active Directory, press "Import from AD" on the Quick Command panel of the "Administration -> Users" tab. In the appeared window, indicate the domain name, from which the users will be imported, then enter the login and password for connecting to the domain and press "Preview".

Users import | Cancel

Data source:

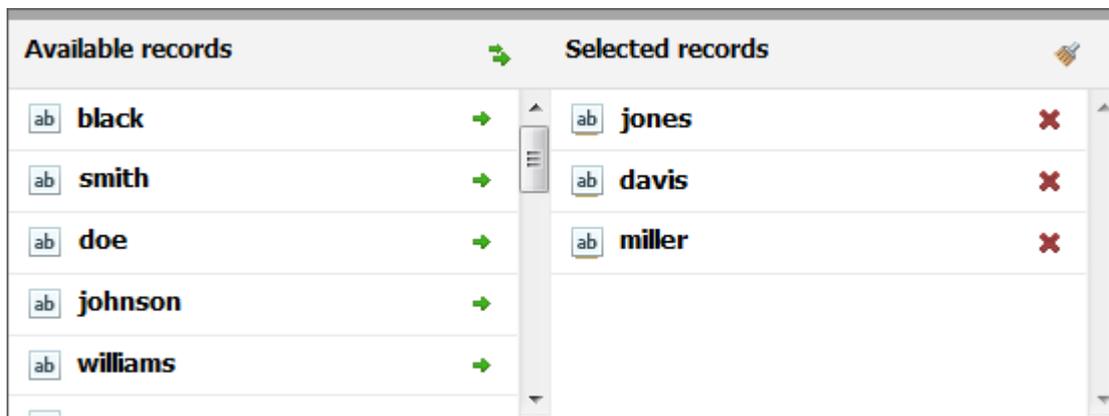
Domain:

Login/Password: /

Attention: If the TeamWox server is not included to the domain, from which you need to import accounts, then while doing authentication it's necessary to indicate the full domain name and user name

in it. For example, Domain: "domain.local", Login: "domain.local\administrator".

If authorization was done correctly, the list of accounts for import appears.



The left part of the window contains the list of accounts from the Active Directory. To add a user to the list of users to import to TeamWox, press its login (name) in the left part of the window. After that the user's name moves to the right part of the window, to the list of imported users. Any user can be deleted from the import list by pressing on the user's name in the right part of the window.

If you need to add all users to the list to import, run the "Add all" command above the list of users in the Active Directory. You can also delete all users from the import list by pressing the button of the same name above the list.

To begin the account import, press the "Import" button in the lower part of the window. But only the accounts added to the right list will be imported. To cancel importing, press "Cancel". To keep the system security, the ["Authentication by login" right](#) will be prohibited automatically for all users imported from the Active Directory. But users will still be able to enter TeamWox using accounts created earlier in the Active Directory.

Attention: As to imported users the "Working" status is given, their number can be limited by the TeamWox server license. In this case the users from the top lines of the file will be imported.

Creating Accounts Manually

You can create users' accounts in the TeamWox system manually. To do it, press the "Add" button on the Quick Command panel of the "Administration -> Users" tab. You will move to a window of a new user adding, where it's necessary to fill out the following fields: "Name", "Surname", "Login", "New password" and "Confirmation" of entered the password. Notice that the login should be unique.

Administration

→ Personal Details

Back to list

🔍
?

Name:

Surname:

Patronymic:

Birthday:
 Sex:
 Status:

Working since:
 Position:

Department:

Description:

Location:

Language:

Enable calls via SIP. Prefix to dial via SIP:

Timezone:

Daylight Saving Time enabled

Login:

New password:
 Confirm:

All other data is added at [users' profiles configuration](#) stage.

An account in the TeamWox system will be created for a user after pressing the "Add" button. You need to add accounts for all the company employees.

Checking the Correctness

Enter the "Administration -> Users" tab and check the correctness of the TeamWox system user names and logins in the appeared list.

Administration				
Overview	Add Import Export			
Connection				
Settings	<u>Login</u>	Full name	Department	Position
Security	 Alena Grushova	Alena Grushova	International relations Department	Manager
Backup	 Almaz Minaev	Almaz Minaev	Accountants	Accountant
Groups	 Andrey Pozharov	Andrey Pozharov	Sales Department	Sales manager
→ Users	 Andrey Rogozhin	Andrey Rogozhin	Sales Department	Sales manager
Modules	 Anton Pisarev	Anton Pisarev	TechSupport	Technical Support
Sounds	 Antonina Vorobey	Antonina Vorobey	Marketing Department	PR manager
Requests	 Artem Korneev	Artem Korneev	ABC Company	CEO
Journal	 Artur Valuev	Artur Valuev	Sales Department	Sales manager
Statistics	 John Smith	John Smith		Administrator TeamWox

If it's necessary to edit user's data, press his/her login. In the opened user's profile change appropriate fields in "Personal data" tab and press the "Update" button.

At next stage it's necessary to enter private and contact data for each user, add employees' photos, link users with departments. Also if it's necessary it's possible here to limit the access by IP addresses to TeamWox for some certain users.

Personal Details

Enter the "Administration -> Users" tab and choose a user from the list by pressing his/her login. You will be moved to the user's profile in the "Personal Details" tab. All the information about the user's registration in TeamWox is stored here. Fill in the empty fields: enter the first name and the surname, indicate gender, date of birth and date when the user began to work in the company, the user's department and position. Don't forget to download the user's personal photo. You can do it with the help of the "Edit" button below the avatar.

Administration

- > Personal Details
- Contact Details
- Identification Details
- Security
- Permissions
- Groups
- Widgets
- History

Back to list | Next

Alena Grushova (Age: 35, Position: Manager)

Name:

Surname:

Patronymic:

Birthday:
 Sex:
 Status:

Working since:
 Position:

Department:

Description:

Location:

Language:

Enable calls via SIP. Prefix to dial via SIP:

Timezone:

Daylight Saving Time enabled

Login:

New password: Confirm:



If the department isn't indicated ("None" is chosen in the "Department" field), it's necessary to chose an appropriate department from the list that was created before. The "Department" field links a user to a certain department and gives him/her all group rights about this department.

If foreign citizens work in the company, it's necessary to choose for them their native language in the "Language" field. For example, for Spanish speaking users choose "Spanish" as the interface language.

So that a user can call via a softphone, it's necessary to give him/her a permission by ticking "Enable calls via SIP". Naturally, so that one can make calls, it's necessary to install a softphone on his/her working place. Then in the neighbour field it's necessary to choose the individual prefix according to the softphone type. This prefix will be added to all numbers during calls from the system. For example, if a user uses "Skype", you need to enter prefix "skype:" in the profile. Press the field, choose a prefix from the drop-down list or enter it manually. If the individual prefix is not chosen, then the common prefix chosen earlier in "[Administration -> Settings](#)" will be used during calls.

While creating an account in the system, the login and the password were already given to each user. They can be changed in the profile with the help of fields of the same names in the lower part of the "Personal Details" section if necessary. The password for imported accounts, to which you gave a common password ([you filled "Password" field in "Users import" tab](#)), has to be changed.

Attention: Each password must contain not less than 6 characters including lower and upper case letters and digits. All characters are available: digits, letters, spaces, double quotes, etc.

To save changes in the "Personal Details" tab press the "Update" button. To cancel the changes and return to the list of TeamWox users press the "Cancel" button.

Then using the information that was given to you by the Personnel Department, fill out the "[Contact Details](#)" and "[Identification Details](#)" tabs with data in the user's profile.

Contact Details

Enter the "Contact details" section in a user's profile. It's necessary to write the user's contact information here by filling out "Address", "Registered address", "Phone numbers" and "Messengers".

Administration

<div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc;">Personal Details</div> <div style="background-color: #e0e0e0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">→ Contact Details</div> <div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">Identification Details</div> <div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">Security</div> <div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">Permissions</div> <div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">Groups</div> <div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">Widgets</div> <div style="background-color: #f0f0f0; padding: 2px; border: 1px solid #ccc; margin-top: 1px;">History</div>	<div style="background-color: #2c4e64; color: white; padding: 5px; border: 1px solid #2c4e64;"> Back to list Next <div style="float: right; border: 1px solid #2c4e64; padding: 2px 5px; width: 100px;"> <input style="width: 90%; border: none;" type="text"/> 🔍 ? </div> </div> <div style="background-color: #2c4e64; color: white; padding: 5px; border: 1px solid #2c4e64; margin-top: 5px;"> Alena Grushova (Age: 35, Position: Manager) </div> <div style="margin-top: 10px;"> <p>Address <small>(Copy from registered address)</small></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-bottom: 1px solid #ccc;">Country: USA</td> <td style="width: 30%; border-bottom: 1px solid #ccc;">State: </td> <td style="width: 40%; border-bottom: 1px solid #ccc;">City: Boston</td> </tr> <tr> <td style="border-bottom: 1px solid #ccc;">Zip code 02107</td> <td colspan="2" style="border-bottom: 1px solid #ccc;">Address 2rd floor, 7 Cambridge Street</td> </tr> </table> </div> <div style="margin-top: 10px;"> <p>Registered address <small>(Copy from address)</small></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-bottom: 1px solid #ccc;">Country: USA</td> <td style="width: 30%; border-bottom: 1px solid #ccc;">State: </td> <td style="width: 40%; border-bottom: 1px solid #ccc;">City: Boston</td> </tr> <tr> <td style="border-bottom: 1px solid #ccc;">Zip code 02107</td> <td colspan="2" style="border-bottom: 1px solid #ccc;">Address 2rd floor, 7 Cambridge Street</td> </tr> </table> </div> <div style="margin-top: 10px;"> <p>Phone numbers</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-bottom: 1px solid #ccc;">Home: +1 (617) 123-0000</td> <td style="width: 30%; border-bottom: 1px solid #ccc;">Mobile: +1 (617) 123-4567</td> <td style="width: 40%; border-bottom: 1px solid #ccc;">Work: </td> </tr> <tr> <td style="border-bottom: 1px solid #ccc;">Fax: </td> <td style="border-bottom: 1px solid #ccc;">Softphone (SIP): </td> <td style="border-bottom: 1px solid #ccc;">Other: </td> </tr> </table> </div> <div style="margin-top: 10px;"> <p>Messengers</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-bottom: 1px solid #ccc;">ICQ: 159753</td> <td style="width: 30%; border-bottom: 1px solid #ccc;">MSN: </td> <td style="width: 40%; border-bottom: 1px solid #ccc;">Skype: </td> </tr> <tr> <td style="border-bottom: 1px solid #ccc;">Yahoo Messenger: </td> <td colspan="2" style="border-bottom: 1px solid #ccc;">Other: </td> </tr> </table> <p style="margin-top: 5px;">Email: alena.grushova@gmail.com</p> </div> <div style="text-align: right; margin-top: 10px;"> <input style="border: 1px solid #ccc; padding: 2px 10px;" type="button" value="Update"/> <input style="border: 1px solid #ccc; padding: 2px 10px; margin-left: 20px;" type="button" value="Cancel"/> </div>	Country: USA	State: 	City: Boston	Zip code 02107	Address 2rd floor, 7 Cambridge Street		Country: USA	State: 	City: Boston	Zip code 02107	Address 2rd floor, 7 Cambridge Street		Home: +1 (617) 123-0000	Mobile: +1 (617) 123-4567	Work: 	Fax: 	Softphone (SIP): 	Other: 	ICQ: 159753	MSN: 	Skype: 	Yahoo Messenger: 	Other: 	
Country: USA	State: 	City: Boston																							
Zip code 02107	Address 2rd floor, 7 Cambridge Street																								
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Fax: 	Softphone (SIP): 	Other: 																							
ICQ: 159753	MSN: 	Skype: 																							
Yahoo Messenger: 	Other: 																								

Fill out an appropriate field with the user's actual address. The registration address can be copied from the actual address (if it is indicated) and vice versa with the help of buttons of the same names. Indicate phone numbers (home, mobile, work, fax, softphone) and electronic contacts (ICQ, MSN, Skype, Yahoo Messenger, Email) for connection with an employee.

If an IP softphone is used in the company, it's necessary to enter the phone number in the "Softphone (SIP)" field. This number will be linked with the user's tooltip which appears when the cursor is put over a user's name in any TeamWox department. This allows all system users to call easily to the colleague, even knowing only his/her name. The format should be the following: "sip:phone number" (for example: "sip:+78431234567"). More detailed information about how to configure a server for making calls via TeamWox is shown in the "[Phone settings](#)" section.

Fill in the "Email" field in electronic contacts, showing there the user's e-mail. Then in the "Mail configuration" section [connect the mailbox](#) with the TeamWox system for direct working with it from the E-Mail module.

To save these data press the "Update" button in the lower part of the working area. To cancel the addition of information and return to the list of users, press "Cancel" or "To the list" in the Quick Command panel.

Identification Details

Then type additional data in the user's profile. Here it's necessary to complete "Documents", "Family" and "Education" sections.

Administration

- Personal Details
- Contact Details
- Identification Details
- Security
- Permissions
- Groups
- Widgets
- History

Back to list | Next

🔍
?

Alena Grushova (Age: 35, Position: Manager)

Documents

Employee ID: <input type="text" value="OM-011"/>	ITIN (tax id): <input type="text" value="010123456789"/>	SSN (insurance id): <input type="text" value="012-345-578-99"/>
Passport: <input type="text" value="0102 N9123456 issued 12.01.2004 Boston City"/>		
Driver license: <input type="text" value="-"/>	Car numbers: <input type="text"/>	
Health insurance: <input 10.2012"="" health="" insurance",="" type="text" value="855-1234, "/>	Other identifications: <input type="text"/>	

Family

Marital status: Number of children:

Near relatives:

HTML

🔍
?

contact for emergency communications	Name	г.р.	контактный телефон
husband	Andrey Grushov	1971	+1 617 1234567

HTML

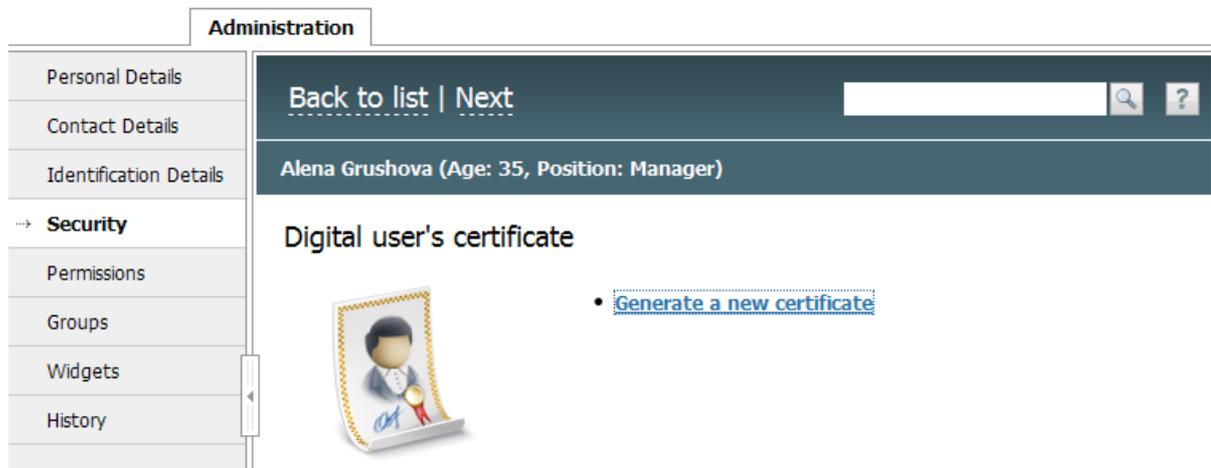
🔍
?

High School	degree	Year	документ	Number
Boston University	specialist	1996	diploma	A 123456

In the "Documents" section type manually information about the user's personal documents, his/her ID, tax ID, insurance ID, passport details, medical insurance number. If a user has a car, indicate its model and registration number. For entering information about family and education, use the message editor. Indicate marital status, number of children, relatives to contact in case of emergencies, information about educational institutions from which the user graduated and additional courses if there are any. To save these data, press the "Update" button in the lower part of the working area. To finish the work with users' settings, it's necessary to set up "Security" and "Widgets" tabs in the [next section](#).

35

Enter the "Security" tab in the user's profile. Here it's necessary to make changes according to the company security policy and the [chosen type of users' authentication](#).

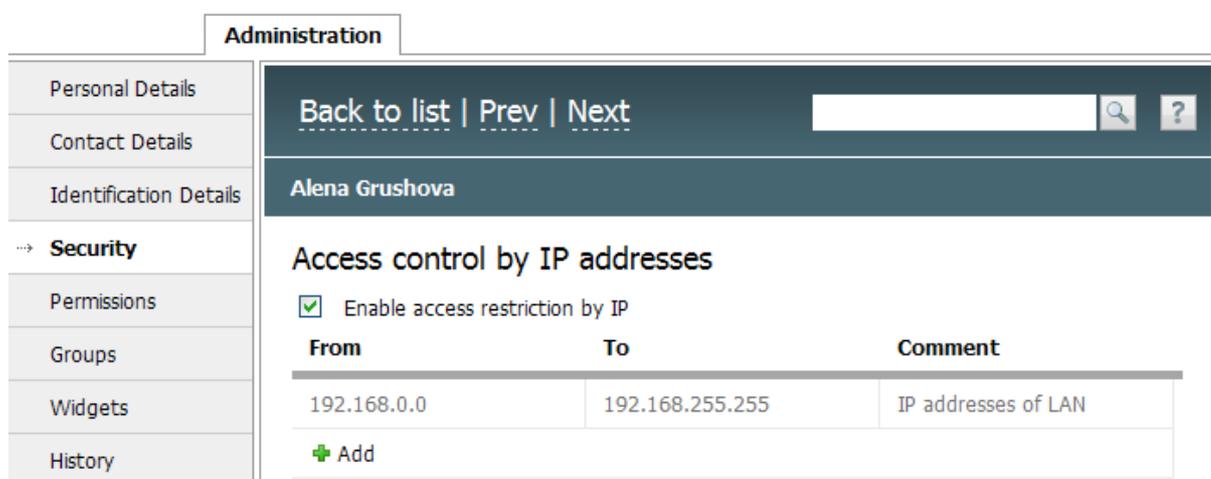


The screenshot shows the 'Administration' tab for a user profile. The left sidebar contains navigation options: Personal Details, Contact Details, Identification Details, **Security** (highlighted), Permissions, Groups, Widgets, and History. The main content area has a dark header with 'Back to list | Next' and a search bar. Below the header, the user's name 'Alena Grushova (Age: 35, Position: Manager)' is displayed. The main section is titled 'Digital user's certificate' and features a small image of a certificate and a bullet point with the link 'Generate a new certificate'.

If the server was set up for [authentication by clients' certificates](#), which are given by the TeamWox system, you need to generate certificates for each user. To do it, press the "Generate a new certificate" button in the "Security" tab of the user's profile, then in the opened window enter the expiry date of the certificate (in years) and press "OK". A client's certificate will be generated and in the "Security" tab working area two additional buttons will appear: "Get a certificate" (if you press it, a PFX-file with the client certificate will be created, it should be sent to the user) and "Delete certificate" (with the help of it you can delete the certificate from the system). The generated PFX-file contains the unique authentication information, which a user needs to enter each time he/she logs in to TeamWox. It can also be written to a smart-card, USB-token and other electronic devices used in the company for authentication.

If the company uses its own certificates for authentication, additional settings in users' profiles are not necessary. You only need to add to TeamWox the certificate (file) of the common key and configure access rights. It was already described at the stage of [server configuration for authentication](#).

If you need to limit IP addresses, which will be accessible for users for connecting to the system, tick "Enable access restriction by IP".



The screenshot shows the 'Administration' tab for a user profile, specifically the 'Security' sub-tab. The left sidebar is the same as in the previous screenshot. The main content area has a dark header with 'Back to list | Prev | Next' and a search bar. Below the header, the user's name 'Alena Grushova' is displayed. The main section is titled 'Access control by IP addresses' and includes a checked checkbox for 'Enable access restriction by IP'. Below this is a table with three columns: 'From', 'To', and 'Comment'. The table contains one entry: '192.168.0.0' in the 'From' column, '192.168.255.255' in the 'To' column, and 'IP addresses of LAN' in the 'Comment' column. There is also a '+ Add' button at the bottom of the table.

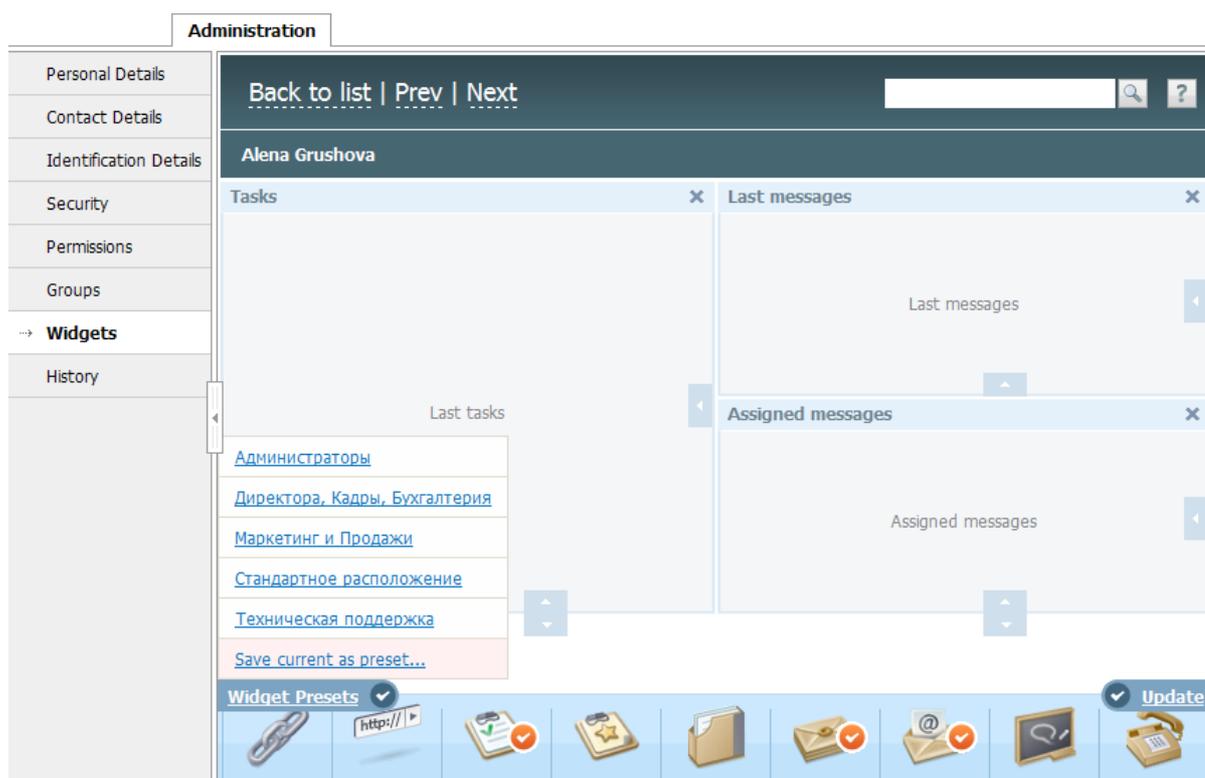
From	To	Comment
192.168.0.0	192.168.255.255	IP addresses of LAN

Then indicate the range of IP addresses, from which users can enter the system. For example, you can limit the access to the system for all addresses except office ones. To create the range, press the

"Add" button. A new line will appear in the table. To begin editing the range of limits, double click on one of the fields. In the "From" column indicate the initial address of the range, and in the "To" column - the final. You can add a comment to the address range in "Comment" field. To delete a range, press the "Delete" button which appears in the end of the line in the table. After creating necessary ranges, press "Save". You can cancel changes and close the window by pressing the "Cancel" button.

Configure Widgets for Users

Widgets are shown on the home page of each user and are made for speeding-up his/her work. They allow to notice quickly the updates in the system (for example, if a new task appears, a mail or a document arrives, etc.). You can configure the individual set of widgets for each user via "Administration -> Users". Later users can change the set of accessible widgets themselves or even disable them. Enter the "Widgets" tab in the user's profile.



All available widgets are shown at the bottom of the working area. A purpose of each widget is described in the Help section devoted to appropriate modules. To install a widget on a user's home page, use Drag'n'Drop. All the available places for setting widgets are framed with a red dotted line. You can change size of widgets with the help of arrows shown on the widget border.

To make configuration more comfortable, the TeamWox system has the templates of how to position widgets. They are available at a click on "Widgets Presets" in the left lower corner of the working area. Choose a widget template for a user according to the specific features of his/her work. For example, for Personnel Department workers choose "Directors, Personnel, Accounting". After you select it, the widgets most often used by these workers will take their places in a standard order in the working area. Edit the arrangement of widgets manually if necessary. To save changes, press the "Update" button in the right lower corner of the working area.

Repeat all the steps of profile configuration (completing ["Personal details"](#), ["Contact details"](#),

"Identification details", "Security" and "Widgets") for each user of the TeamWox system. To switch from one user to another, use "Next" and "Previous" on the Quick Command panel of a user's profile.

Functional groups and departments were already added to the TeamWox system at the stage of the [company structure building](#). They are similar in many things, one can add and configure them in the same "Administration -> Groups" tab. The main difference between departments and groups is that users can see the information about departments in the "Team" module. In addition, in TeamWox users are automatically connected to the company departments while choosing a department in the "Department" field of a user's profile. It was already done while [configuring users' profiles](#).

Therefore on the next stage it's necessary to bind users to functional groups. It's necessary for setting group permissions for working with different information in the system (tasks, documents, organizations, etc). There are two ways of adding a user to a functional group: from a user's profile or from a [group profile](#).

User's Profile

In the first case, choose necessary groups from the list for a certain user. It's convenient when users are added to a large amount of groups or it's necessary to edit a list of groups for an individual user. For example, for a new user after the system was already configured. To do it, you need to enter the "Groups" tab in the user's profile.

Administration

Personal Details	Back to list Prev Next																										
Contact Details	<input style="width: 100%; height: 20px;" type="text"/>																										
Identification Details	Alena Grushova (Age: 35, Position: Manager)																										
Security	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;"></th> <th style="width: 60%;">Full name</th> <th style="width: 25%;">Description</th> <th style="width: 5%;"></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td>Everyone</td> <td>Built-in group containing all users</td> <td></td> </tr> <tr> <td style="text-align: center;"></td> <td>Sales Department</td> <td>Promotion, maintenance contracts</td> <td style="text-align: center; color: red;">✘</td> </tr> <tr> <td style="text-align: center;"></td> <td>I like a football</td> <td>For the players and fans of football</td> <td style="text-align: center; color: red;">✘</td> </tr> <tr> <td style="text-align: center;"></td> <td>International relations Department</td> <td>Interaction with foreign organizations</td> <td style="text-align: center; color: red;">✘</td> </tr> <tr> <td style="text-align: center;"></td> <td>Marketing Department</td> <td></td> <td style="text-align: center; color: red;">✘</td> </tr> </tbody> </table>				Full name	Description			Everyone	Built-in group containing all users			Sales Department	Promotion, maintenance contracts	✘		I like a football	For the players and fans of football	✘		International relations Department	Interaction with foreign organizations	✘		Marketing Department		✘
	Full name	Description																									
	Everyone	Built-in group containing all users																									
	Sales Department	Promotion, maintenance contracts	✘																								
	I like a football	For the players and fans of football	✘																								
	International relations Department	Interaction with foreign organizations	✘																								
	Marketing Department		✘																								
Permissions	+ Add the user to the group																										
→ Groups	<input type="button" value="Update"/> <input type="button" value="Cancel"/>																										
Widgets																											
History																											

To add a user to groups, press the "Add the user to the group" button. Then choose necessary groups from the appeared list by ticking their names. Press the "Choose" button to finish. After it the chosen groups will appear in the group list of the "Groups" tab of the user's profile. In this tab you can also delete a user from one of the groups by pressing the "Delete" button (which is to the right of the group name). To save changes, press the "Update" button.

Profile of a Group

While doing the first configuration of the system, it's easier to connect users to groups using the second method - from the "Administration -> Groups" tab. Enter the profile of a functional group by pressing its name in the list of departments/groups in "Administration -> Groups". Then choose "Users" in the navigation.

Administration

Back to list | [Prev](#) | [Next](#)

International relations department (Interaction with foreign organizations)

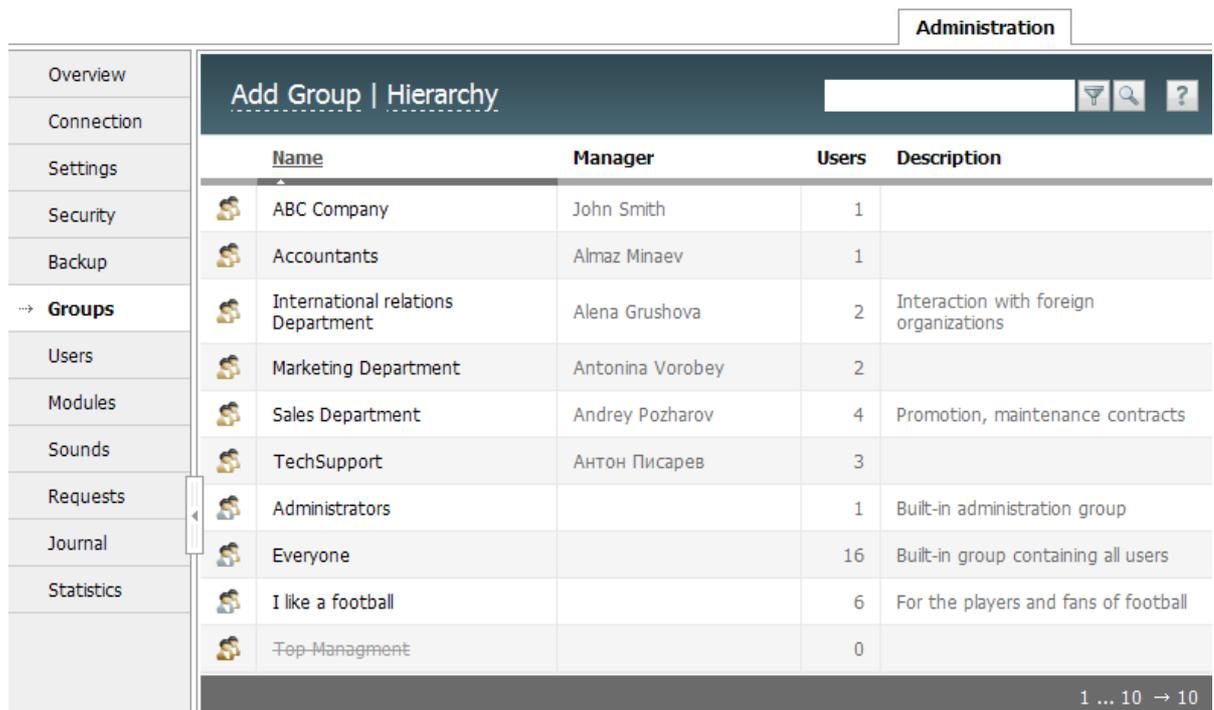
	Full name	Position	
	Alena Grushova	Manager	✖
	Antonina Vorobey	PR manager	✖

+ Add the user to the group

Here all users, which are in this group, are shown as a list. Press the "Add the user to the group" button. A window of users adding will open and you need to tick there all the necessary users and press the "Select" button.

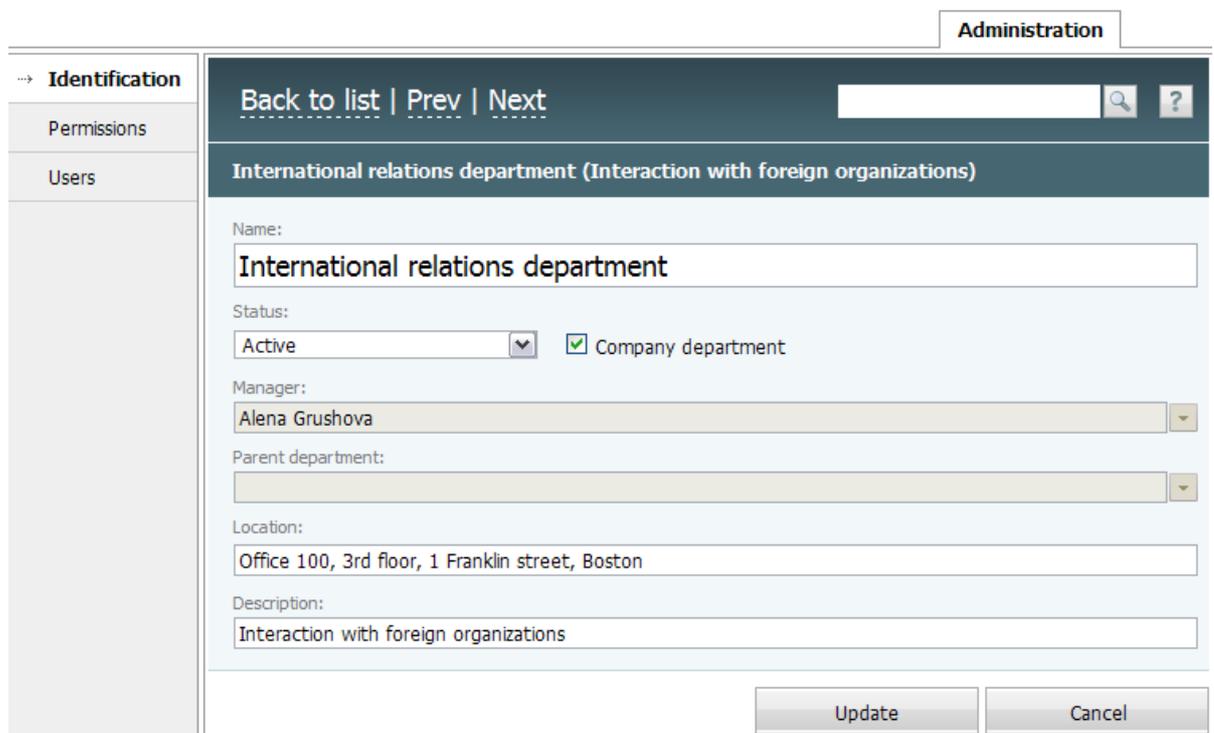
To save changes, press the "Update" button. Go to the general group list by pressing "To the list" on the Quick Command panel. Edit users' lists of all functional groups in the same way.

After adding users, indicate managers for [earlier created departments](#) in TeamWox. To choose the department manager, enter the list of groups and departments in the "Administration -> Groups" tab.



Name	Manager	Users	Description
 ABC Company	John Smith	1	
 Accountants	Almaz Minaev	1	
 International relations Department	Alena Grushova	2	Interaction with foreign organizations
 Marketing Department	Antonina Vorobey	2	
 Sales Department	Andrey Pozharov	4	Promotion, maintenance contracts
 TechSupport	АНТОН Писарев	3	
 Administrators		1	Built-in administration group
 Everyone		16	Built-in group containing all users
 I like a football		6	For the players and fans of football
 Top Management		0	

To make navigation more comfortable, the departments are shown in the upper part of the list and marked with a golden icon - . Press the name of the necessary department to see its profile.



Back to list | Prev | Next

International relations department (Interaction with foreign organizations)

Name:

Status: Company department

Manager:

Parent department:

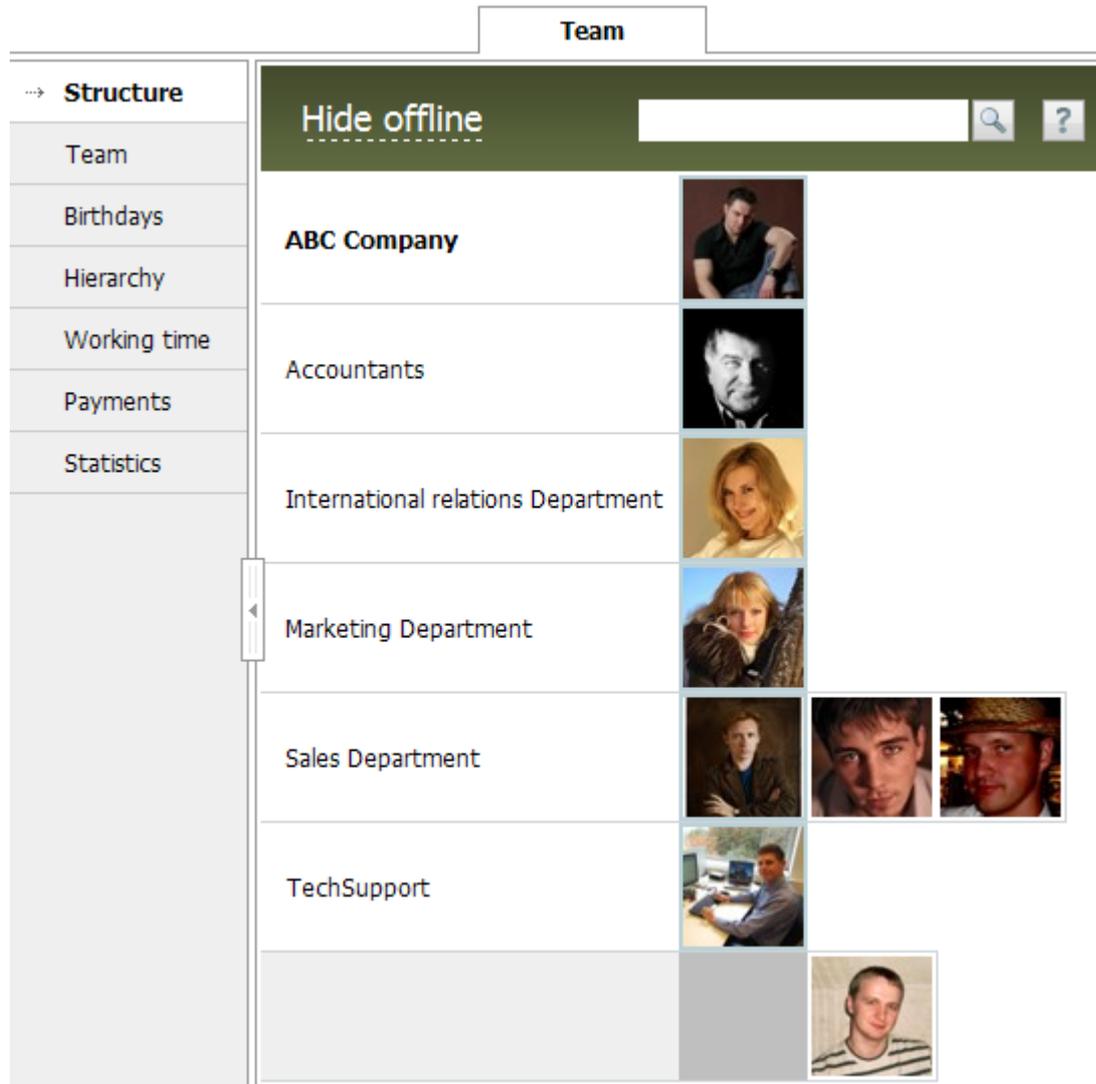
Location:

Description:

In "Identification - Manager" choose the department manager from the list and press "Update". Choose managers for other company departments in the same way. To switch from one department to

another, use "Previous/Next" in the Quick Commands panel. To return to the list of groups and departments, press "To the list" in the Quick Command panel.

Chosen department managers are shown in the appropriate column of "Administration -> Groups". Also, the information about managers will be shown in "Team -> Structure".



In this section you can view the company structure and use quick navigation in information about employees. The first column contains department names. Names of the main departments (the first level of hierarchy) are highlighted with bold. All other departments are shown in a normal font. For example, the sales department is subordinated to the marketing department, so the first one is shown lower and in normal print. In the second column there are photos/avatars of department managers. Employees which are not linked to any department are shown in the lowest line (that corresponds with "NONE" in the ["Department" field of the "Personal Details" tab of the user](#)). In a perfect case, there should be no such employees.

This section is one of the most important in the TeamWox system. For each module there is a list of access rights - prohibitions and permissions to access to some certain system resources. In this section you should to configure the access rights for departments, functional groups and users.

Attention: Departments and groups have no difference in the area of access rights. Therefore the information about rights configuration for groups is the same as for departments.

Permissions and prohibitions in TeamWox work under certain rules. If some action is prohibited for the group, it's prohibited for all members from this group, and individual settings don't matter. But if the action is "not prohibited", individual user's permission settings are valid. Inhibiting instructions always have more power. The access to the actions which are not indicated as "permitted" -  or "prohibited" - , will be denied - . Possible variants of access rights configuration are shown in the table:

Group rights	Individual	User's access to recourses
	  	no yes no
	  	yes yes no
	  	no no no

Attention: The same rules work for individual and group rights. For example, an employee is in the law department (has an access to work with documents) and is included to the "Struggle with bureaucracy" group (he has no access to work with documents). In this case the employee will lose the permission to work with documents.

It's recommended to set up the access rights configuration step by step:

1. Identify the TeamWox system modules which won't be useful for users according to the company structure analysis and functional duties of groups. These modules should be switched off ("Administration -> Modules") to make the work with the system easier. In this case the tabs of the modules that were switched off won't be shown in the modules list. And you don't need to set up the list of access rights for them (they won't be shown in the working area of the "Access rights" tab). All data about switched off modules will be saved and will be accessible only after they are enabled. So you need to skip the parts from this guide that are about configuration of the modules that are useless for this company. For example, if the company doesn't need Service Desk, you switch off this module and don't configure it. Enter the "Administration -> Modules" tab.

Administration

<ul style="list-style-type: none"> Overview Connection Settings Security Backup Groups Users → Modules Sounds Requests Journal Statistics 	Restart server Upgrade server <div style="float: right; border: 1px solid white; padding: 2px 5px; margin-left: 10px;"> <input style="width: 80px; height: 15px;" type="text"/> 🔍 ? </div>
	<div style="border-bottom: 1px solid #ccc; margin-bottom: 10px;"> <div style="display: flex; align-items: center;"> <div> <h3 style="margin: 0;">Tasks</h3> <p style="font-size: 0.9em; margin: 0;">Module for working with tasks</p> <p style="font-size: 0.8em; margin: 0;">© 2006-2010, MetaQuotes Software Corp., Version: 1.00 build 538 (19 Jul 2010), Data size: 256 Kb</p> </div> </div> <div style="text-align: right; margin-top: 5px;"> ✔ Loaded </div> </div> <hr/> <div style="border-bottom: 1px solid #ccc; margin-bottom: 10px;"> <div style="display: flex; align-items: center;"> <div> <h3 style="margin: 0;">Documents</h3> <p style="font-size: 0.9em; margin: 0;">Module for working with documents</p> <p style="font-size: 0.8em; margin: 0;">© 2006-2010, MetaQuotes Software Corp., Version: 1.00 build 562 (23 Jul 2010), Data size: 0 bytes</p> </div> </div> <div style="text-align: right; margin-top: 5px;"> ✔ Loaded </div> </div> <hr/> <div style="border-bottom: 1px solid #ccc; margin-bottom: 10px;"> <div style="display: flex; align-items: center;"> <div> <h3 style="margin: 0;">Organizations</h3> <p style="font-size: 0.9em; margin: 0;">Module for managing organizations</p> <p style="font-size: 0.8em; margin: 0;">© 2006-2010, MetaQuotes Software Corp., Version: 1.00 build 582 (26 Jul 2010), Data size: 0 bytes</p> </div> </div> <div style="text-align: right; margin-top: 5px;"> ✔ Loaded </div> </div>
	🔧 Configure

Put the mouse cursor on a useless module and press the "Turn off" button that will appear. Repeat the operation for all such modules. Then press "Update" in the low part of the working area and restart the TeamWox server by pressing an appropriate button in the Quick Command panel. All switched off modules are marked with "Not downloaded" sign. But it's possible to switch the module on by pressing on the appearing command (put mouse cursor on the appropriate module in the list to see the command). The module will switch on also only after the TeamWox server is restarted.

2. [Configure rights for the groups](#) "Administrators" and "Everyone". They are main groups in TeamWox, which are initially in the system and can't be deleted. It is recommended to set up rights for created groups and departments by the following steps. To do it, choose an appropriate group in the "Administration -> Groups" tab and open the "Permissions" tab in navigation. Group "Administrators" has access rights to all TeamWox system resources by default. It's possible to limit these rights if necessary, except the rights for the "Administration" module. For example, it's possible to prohibit to see the information in the "Team" module, in particular, the salary.

Attention: Any changes of access rights settings and other operations in the system are saved in the TeamWox system journal which is accessible only for observing. Therefore if a system user, including an administrator, does any illegal operations, they can be seen in the journal in "Administration -> Journal".

Initially, the "Everyone" group has an access to modules "Home", "Tasks", "Documents", "Forum", "E-Mail", "Team", "Contacts" and "Search". Authentication by login, tasks and folders creation, mail sending, mailboxes configuration and contacts edition are permitted. Give rights for this group for all additional system recourses if necessary.

3. [Configure access rights for each department](#) individually according to their functional duties. For example, it's necessary to give to Personnel Department extended rights to the "Team" module including a possibility to change users' profiles. Departments that work with contractors need an access to "Accounting", "Organizations" and "Contacts" modules. To set up the rights, choose the department in "Administration -> Groups" and open the "Permissions" tab in navigation. Tick off

an appropriate column in the working area in the line of the function for which it's necessary to set up the access rights. Then the function will be permitted or prohibited for this department. Configure the rights for all necessary functions for each department. Detailed description of how to set up the access rights for a department, group or user [is in the next section](#).

Administration

Identification	Back to list Prev Next <input style="width: 100px;" type="text"/> <input type="search"/> <input type="question"/>		
→ Permissions	International relations department (Interaction with foreign organizations)		
Users	Module	Allow	Deny
	<input type="checkbox"/> Server	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Home	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Tasks	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Documents	<input checked="" type="radio"/>	<input type="radio"/>
	Administration	<input type="radio"/>	<input type="radio"/>
	Reports	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> E-Mail	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Board	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Organizations	<input checked="" type="radio"/>	<input type="radio"/>
	Edit information	<input checked="" type="radio"/>	<input type="radio"/>
	Full information	<input checked="" type="radio"/>	<input type="radio"/>
	Import/export	<input checked="" type="radio"/>	<input type="radio"/>
	Reports	<input type="radio"/>	<input type="radio"/>
	Administrator	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Contacts	<input checked="" type="radio"/>	<input type="radio"/>
	Edit contacts	<input checked="" type="radio"/>	<input type="radio"/>
	Full information	<input checked="" type="radio"/>	<input type="radio"/>
	Import/export	<input checked="" type="radio"/>	<input type="radio"/>

4. [Configure the rights for other groups](#). If any additional groups were created in the TeamWox system, configure access rights for them too. For example, if earlier the group "Newcomers" was created where all new employees are added, it's possible to configure the access rights for observing the information according to the company's security policy. To prohibit the observing of all documents and data about organizations and contacts, it's necessary to tick the names of three modules ("Documents", "Organizations" and "Contacts") in "Deny" column. Then these modules won't be seen in newcomers' pages and they won't have an access to them.

At this stage it's possible, for example, to configure the rights for "Department managers" group to observe employees' tasks from subordinated departments or to observe subordinated departments' tasks and to set up the observation of different reports by ticking these sections in the "Allow" column.

5. [Configure the rights for certain users](#). In some rare cases it can be necessary to set up the access rights for some certain employees. For example, if it's necessary to prohibit to observe company documents, organizations and contacts for an individual contractor. To do it, enter "Administration -> Users" tab, choose a necessary user from the list and open the "Permissions" tab in the user's profile. Tick appropriate module names in "Deny" column in the working area and press "Update".

It's absolutely necessary to give appropriate permissions in the "Server" block of access rights for all groups/users. The rights for users authentication in the system are shown there. For example, for the "Everyone" group it's possible to permit "Authentication by login" and prohibit "Authentication in domain" and "Authentication by CA certificates". In this case all users can enter the system only with their login and password.

Module	Allow	Deny
Server	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticate by login	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticate by login in domain	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticate by CA certificate	<input type="checkbox"/>	<input checked="" type="checkbox"/>

If later it's necessary to prohibit any user's access to the system by login, enter his/her personal profile ("Administration -> Users" tab), then choose "Permissions" in navigation and tick "Deny" in the "Authentication by login" line.

Administration

- Personal Details
- Contact Details
- Identification Details
- Security
- Permissions**
- Groups
- Widgets

[Back to list](#) | [Next](#)

Alena Grushova (Age: 35, Position: Manager)

Module	By group	Allow	Deny
Server	Allow	<input type="checkbox"/>	<input type="checkbox"/>
Authenticate by login	Allow	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticate by login in domain	Deny	<input type="checkbox"/>	<input type="checkbox"/>
Authenticate by CA certificate	Deny	<input type="checkbox"/>	<input type="checkbox"/>

Permit appropriate operations for the created departments/groups according to their peculiarities. For example, employees of the Personnel Department need the right to edit the information (in profile) about all users. Set up permissions/prohibitions for all groups including "Everyone", according to their functional duties. You can also change rights for the "Administrators" group except the "Administration" section. This group has an access to all TeamWox resources.

Configuration of Group and Department Permissions

To configure group and department rights, choose a department/group from the list in the "Administration -> Groups" tab, then choose "Permissions" in navigation.

Administration

Identification	Back to list Prev Next <input style="width: 150px;" type="text"/> <input type="button" value="🔍"/> <input type="button" value="❓"/>		
→ Permissions	International relations department (Interaction with foreign organizations)		
Users	Module	Allow	Deny
	<input checked="" type="checkbox"/> Server	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Home	<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Tasks	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Documents	<input checked="" type="radio"/>	<input type="radio"/>
	Administration	<input type="radio"/>	<input type="radio"/>
	Reports	<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> E-Mail	<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Board	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Organizations	<input checked="" type="radio"/>	<input type="radio"/>
	Edit information	<input checked="" type="radio"/>	<input type="radio"/>
	Full information	<input checked="" type="radio"/>	<input type="radio"/>
	Import/export	<input checked="" type="radio"/>	<input type="radio"/>
	Reports	<input type="radio"/>	<input type="radio"/>
	Administrator	<input type="radio"/>	<input type="radio"/>
	<input type="checkbox"/> Contacts	<input checked="" type="radio"/>	<input type="radio"/>
	Edit contacts	<input checked="" type="radio"/>	<input type="radio"/>
	Full information	<input checked="" type="radio"/>	<input type="radio"/>
	Import/export	<input checked="" type="radio"/>	<input type="radio"/>

Functions according to which it's possible to delimit rights are numbered in the first column "Module". Functions are divided according to system modules. You can read about them in the "Permissions" section of each module description. Indicate appropriate rights for each section in "Allow" and "Deny" columns. If you press the button in the "Allow" column, the sign  will appear, in the "Deny" column -  sign.

Step by step, choose access rights to certain TeamWox resources for a chosen department/group. First of all, permit the access to observe the module. To do it, put the tick near the module's name in the "Allow" column. Then give permissions for useful functions in this module (for example, you can permit to "edit the contact"). To save changes in rights configuration, press "Update".

Attention: If the right for viewing the module isn't enabled, all the rights mentioned in this module will be invalid as users simply won't see it.

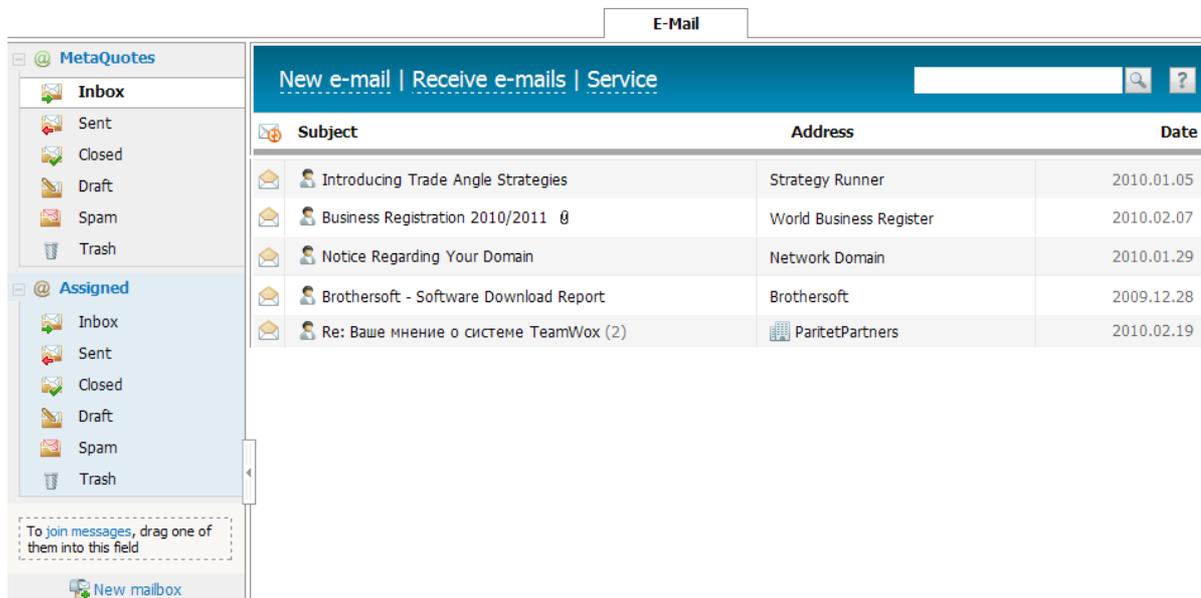
Rights Configuration for Users

Usually, access rights configuration by departments/groups is enough. But sometimes some users can need additional permissions/prohibitions. The rights for these users should be set up individually. For example, you can prohibit new employees to see inner company documents or information in the "Organizations" module. It's recommended to ask department managers, Personnel Department and the security service about the information for individual access rights.

Administration				
Personal Details	Back to list Next			
Contact Details				
Identification Details	Alena Grushova (Age: 35, Position: Manager)			
Security	Module	By group	Allow	Deny
→ Permissions	<input checked="" type="checkbox"/> Server	Allow	<input type="radio"/>	<input type="radio"/>
	Authenticate by login	Allow	<input type="radio"/>	<input type="radio"/>
	Authenticate by login in domain	Deny	<input type="radio"/>	<input type="radio"/>
	Authenticate by CA certificate	Deny	<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Home	Allow	<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Tasks	Allow	<input type="radio"/>	<input type="radio"/>
	Edit/create/delete tasks	Allow	<input type="radio"/>	<input type="radio"/>
	Reports		<input checked="" type="radio"/>	<input type="radio"/>
	View tasks of subordinate departments		<input type="radio"/>	<input type="radio"/>
	View tasks of employees of subordinate departments		<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Documents	Allow	<input type="radio"/>	<input type="radio"/>
	Administration		<input checked="" type="radio"/>	<input type="radio"/>
	Reports		<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> E-Mail	Allow	<input type="radio"/>	<input type="radio"/>
	Create/edit messages	Allow	<input type="radio"/>	<input type="radio"/>
	Create/edit mailboxes	Allow	<input type="radio"/>	<input type="radio"/>
	View reports		<input checked="" type="radio"/>	<input type="radio"/>
	Administrare all mailboxes		<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Board		<input checked="" type="radio"/>	<input type="radio"/>
	Create/edit/delete forum categories		<input type="radio"/>	<input type="radio"/>
	Full administration rights		<input type="radio"/>	<input type="radio"/>
	Show reports		<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Organizations	Allow	<input type="radio"/>	<input type="radio"/>
	Edit information	Allow	<input type="radio"/>	<input type="radio"/>
	Full information	Allow	<input type="radio"/>	<input type="radio"/>
	Import/export		<input checked="" type="radio"/>	<input type="radio"/>
	Reports		<input checked="" type="radio"/>	<input type="radio"/>
	Administrator		<input type="radio"/>	<input type="radio"/>
	<input checked="" type="checkbox"/> Contacts	Allow	<input checked="" type="radio"/>	<input type="radio"/>

To set up individual permissions/prohibitions, enter "Administration -> Users". Choose an appropriate employee from the list by pressing his/her login. In the opened user's profile choose the "Permissions" tab on the left. Put ticks in "Allow" and "Deny" columns where necessary according to group rights configured earlier. To save changes, press the "Update" button and new access rights will come into force.

This section describes how to configure the "E-Mail" module, which was designed for inside and outside mail correspondence. Each user in TeamWox has a mailbox of "Assigned". A user gets there only those mails which were assigned for him by other users. But to have a mail correspondence, each user needs his/her own personal mailbox.

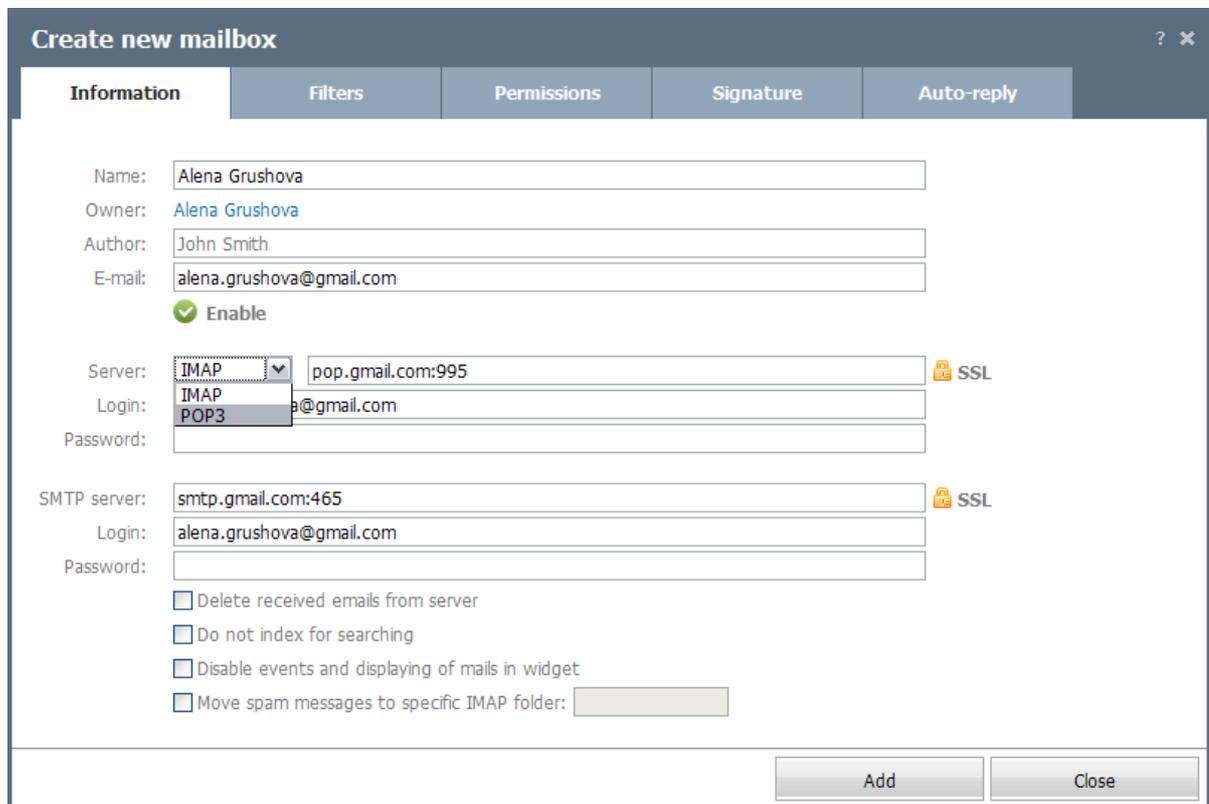


The TeamWox system is a mail client but not a server. Therefore each mail box of the system has to be connected with its mail server for sending and getting mails.

To configure the "E-Mail" module means creating personal mailboxes for all TeamWox users and connecting common corporative mailboxes. You need to set up the connection between mail servers and configure access rights for observing, editing and administering created mailboxes.

To make the configuration of mailboxes easier, the TeamWox system already has templates of settings for some mail servers: "mail.ru", "bk.ru", "yandex.ru", "gmail.com", etc. When you enter an e-mail address into the "E-mail" field, the system identifies the mail server and fills in mail box settings automatically where possible.

Create personal mailboxes for all the company employees. As you are an administrator, you can create mailboxes for users in the "E-Mail" module. Press the "New mailbox" button, which is below all early created mailboxes in navigation. The "New mailbox creation" window will open, it has five tabs: "Information", "Filters", "Permissions", "Signature", "Auto-reply".



Create new mailbox ? x

Information Filters Permissions Signature Auto-reply

Name:

Owner:

Author:

E-mail:

Enable

Server: SSL

Login:

Password:

SMTP server: SSL

Login:

Password:

Delete received emails from server

Do not index for searching

Disable events and displaying of mails in widget

Move spam messages to specific IMAP folder:

In order to add mailboxes for TeamWox users, fill in the fields in the "Information" tab.

1. Press the current owner's name (now it's you, the administrator). From the drop down list choose an employee who will be the owner of a new mailbox. The owner has all rights for his/her mailbox.
2. In the "Name" field enter the name of a new mailbox. It will be shown for the owner in the "E-Mail" module navigation. It's recommended to indicate different mailbox names so that there is no mess during configuration. You can use the owner's name and surname or e-mail as a mailbox name. Later users can change their mailbox names.
3. Then in the "E-mail" field enter the e-mail address of the user's mailbox.
4. Check whether the mailbox is enabled. It can be known by the "Enable" indicator and a tick, which are below the "E-mail" field. If the tick is green, the mailbox is switched on and can receive and send mails. If the tick is grey, the mailbox is switched off and it's necessary to switch it on (press the tick). You may need to switch off mailboxes, for example, if an employee was discharged or was sent for a maternity leave. Or if the mailbox was created for a certain promo action and advertising company, for which it's necessary to get mails only for some limited period of time.
5. Then choose the server type of incoming mails (POP3 or IMAP) and indicate the address (for example, pop.mail.ru). If the customer's company security policy includes working with SSL certificates, switch on the SSL button, which is to the right of the "Server" field. The SSL icon switches on after you press it (becomes gold), the second click switches it off (the icon becomes

grey). If you know, indicate the login and password for the incoming mail server. Mailbox owners can change login, password and other settings themselves. If the password is unknown, leave this field empty, an employee will enter the password himself later.

6. Indicate details of the SMTP-server. Enter the address of the incoming mail server (for example, smtp.mail.ru). Switch SSL button on, if connection to the mail server is implemented by SSL certificates. Indicate login and password for connecting to the server.

Attention: If it's necessary to indicate connection ports for incoming and outgoing mail servers, put colon after their addresses and enter port numbers. For example: "imap.googlemail.com:993" and "smtp.googlemail.com:587".

7. "Delete mails received from server" - if this option is switched on, all mails will be deleted from the mail server (only for POP-servers) after they were received by the TeamWox mail client.
8. "Move mails from Spam category to IMAP folder" - this field was made to enable the integration of the TeamWox mail client with the self-learning antispam filter of the mail server. TeamWox gives an opportunity to move any mails to the "Spam" folder, from which they will be moved to the mail server for autolearning. This function works only through the IMAP protocol. If a mailbox works through POP3, the "Spam" folder will work as a bin. So, for configuration of the work with spam, you need to:
 - configure the mailbox operation through the IMAP protocol;
 - tick "Move mails from Spam category to IMAP folder" in users' mailbox settings;
 - ask a mail server administrator for an exact name of the IMAP folder created for moving spam mails to it. All mails from the "Spam" folder will be sent to it for autolearning;
 - indicate the name of the spam folder in an appropriate field in the lower part of the window.

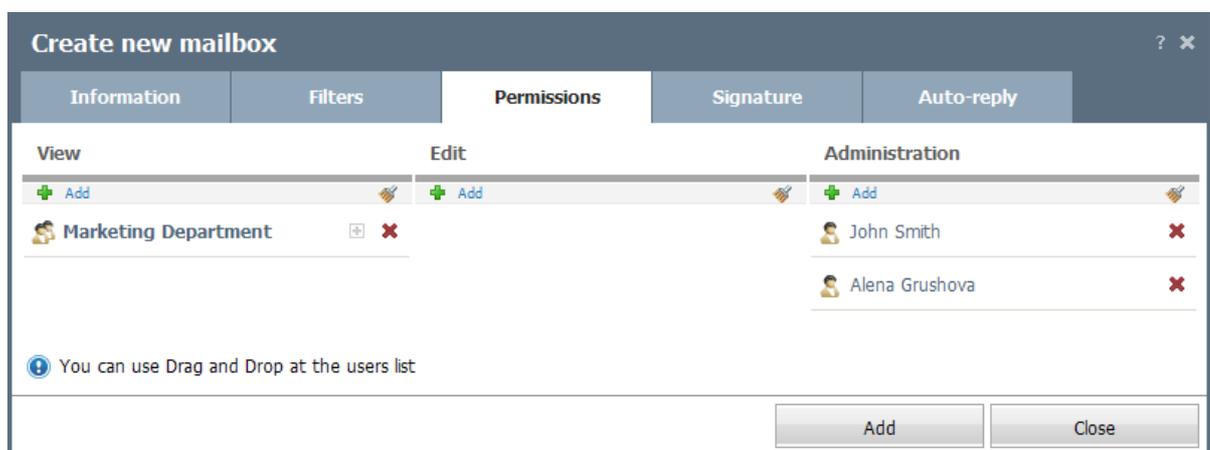
After making all settings, press "Add" in the "Information" tab. A mailbox will be created and will be shown for a mailbox owner in the navigation of "E-Mail" tab. If the mailbox is connected to the mail server successfully, the @ sign to the left of its name will be green. Create private mailboxes for each TeamWox user.

Being an administrator, you can see and edit all mailboxes in TeamWox. Press the "Reports" button in the Quick Commands panel of the "E-Mail" tab. A "Summary report" will be opened, it shows as a table the statistics about all mailboxes created in the TeamWox system. Here it's possible to read and edit information about the owners and settings of all mailboxes created in system. You also can notice if there are any problems with mailboxes by the @ sign colour. For example, if @ sign is red, the mailbox is not connected to the mail server. When you put cursor on the sign, a message about mistakes and settings will be shown.

If the company uses common corporate mailboxes, for example, info@client-company.ru, or "support@client-company.ru", create them in TeamWox. Give the viewing, editing and administrating rights for the employees in charge. This will help to improve work with correspondence when several employees do it together.

At first, gather the information about existing corporate mailboxes in the company. You need to have information about e-mail addresses and the list of employees that are in charge of mail viewing and editing and mailboxes administrating. Ask beforehand which user is going to be an owner of a corporate mailbox and have all rights for it.

Press "New mailbox" in the "E-Mail" module. In the opened "New mailbox creation" window fill in the "Information" tab. A detailed description of the fields of this tab was given in the previous section ["Private mail box creation"](#). Then enter the "Permissions" tab:



Here users' rights for viewing (users/groups can only read mails in the mailbox), editing (in addition users/groups can answer mails, create new ones, edit and delete existing mails) and administrating (in addition users/groups can edit the mailbox settings and delete it) of this mailbox are shown. You can add or delete users from the list of owners with the help of "Add" and "Delete" buttons. It's possible to delete everyone by pressing the appropriate button on the top of the list.

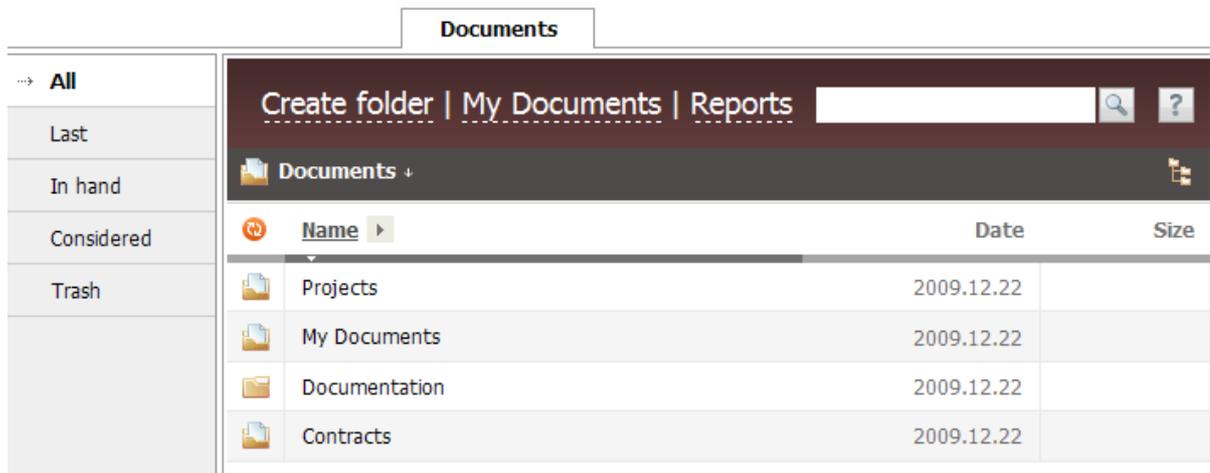
After setting up the user/group rights, press "Add" in the lower part of the window. A mailbox will be created and will be shown for its owner and all users according to their rights. Create all necessary corporate mailboxes in the TeamWox system.

The "Documents" module is designed for building an effective group work with documents. Here you can store, view and edit any documents in the electronic format.

First study the circulation of documents in the client company and formalize it before setting up the work with documents. The understanding of circulation of documents helps to create a clear document structure in the TeamWox system and organize a coordinated work of all employees. It makes work with documents and the search easier.

While analyzing the circulation of documents you need to answer the following questions: Where are the private and corporative documents stored? What way is used for storing the archive of inner and outer company documents and who is in charge of it? Is it necessary to create separate folders for departments and groups for working with documents and who will be in charge of them? And other questions.

After analyzing, you can begin to set up the "Documents" module which means creating the structure of documents in TeamWox, adding of documents archive and configuring access rights to view the information.

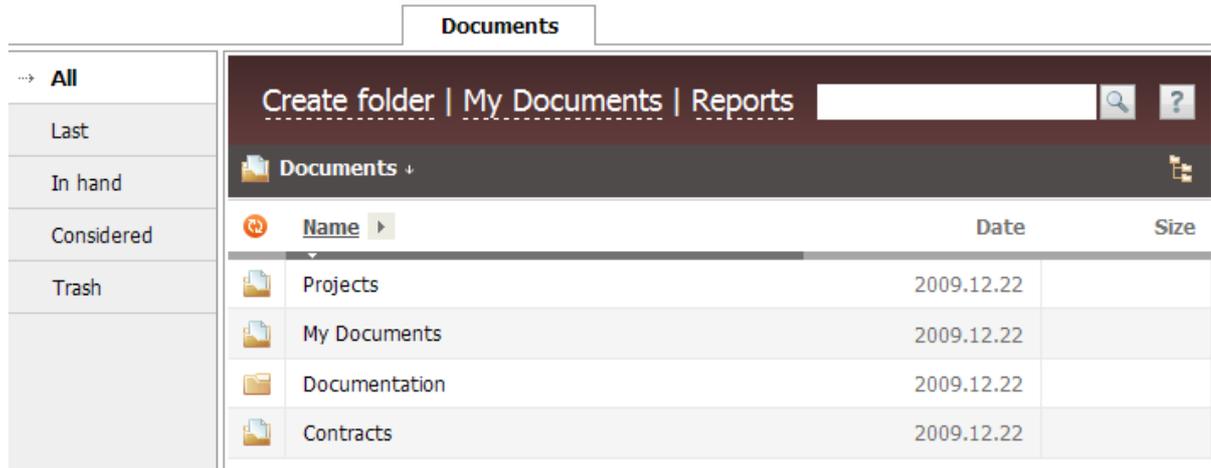


There are two ways of configuring the work with documents in TeamWox; the choice depends on complexity of the level of circulation of documents used in a company:

1. If the current document structure is complicated, it's necessary to import the document archive to TeamWox system as is, and then set up the rights for working with documents.
2. The second way is better for the companies with the small number of documents and easy structure. In this case you have to create the hierarchy of documents storage (root catalogue) manually, then set up users rights for the created folders and add documents.

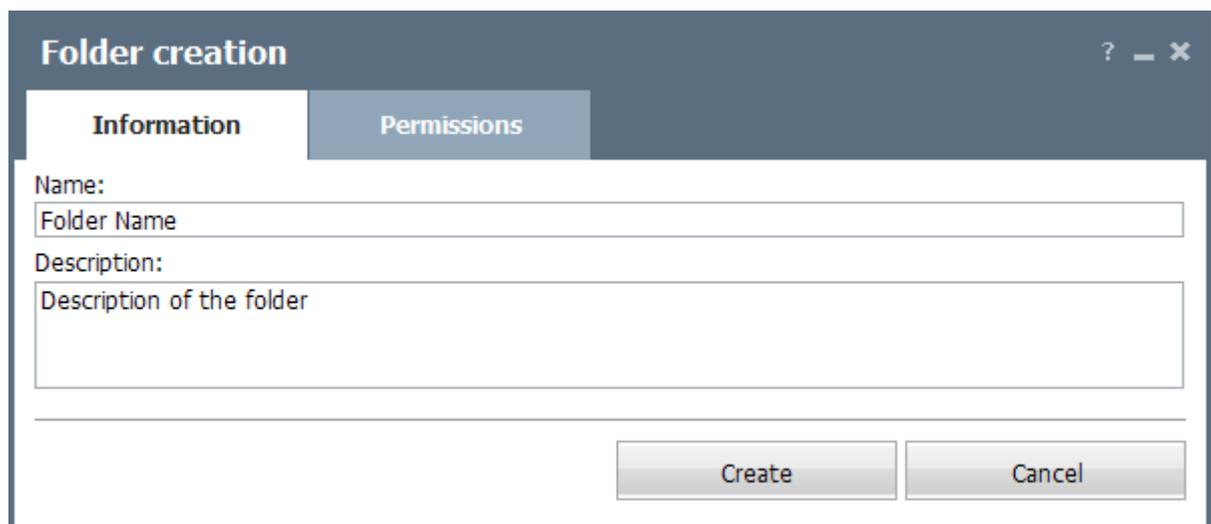
At the next stage, create the hierarchy of documents storage (root catalogue) in the TeamWox system. Being the system integrator, you need to build the hierarchy separately for each company, according to the results of the analysis of the documents system.

Enter the "Documents" module. Here some pre-installed folders are shown, it's possible to change their names and access rights or to delete them completely from the system, except "My documents" folder.



"My documents" is a system folder where each system user's private folders are stored. They are created in the system automatically when a new user is added. The name of a private folder comes from the user's name and surname. If there are two users with the same names and surnames, the login is added to the folder name, for example, "John Smith (john_jr)".

To create a folder, press the "Create folder" button. After you press it, the window of creating a folder appears, it has two tabs: "Information" and "Access rights".



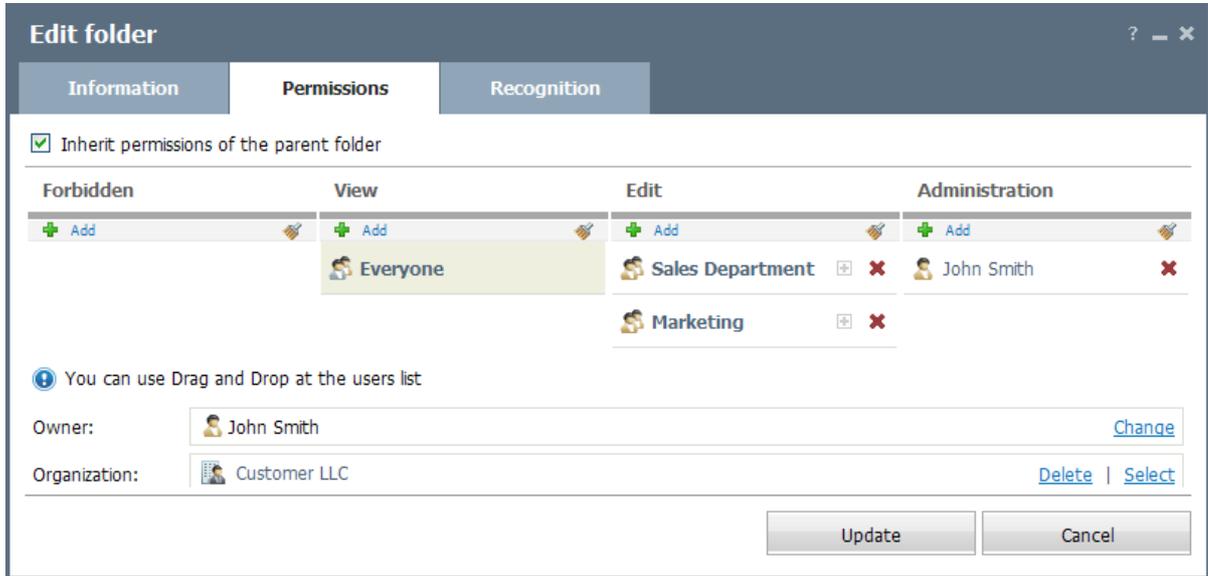
Fill in the "Information" tab, indicating the folder name and its short description. Press the "Create" button to create a new folder in TeamWox. The folder will be shown in the root document directory. In the beginning, only the folder's owner (you) will have an access to it.

In the second tab "Access rights" there is information about access rights and about the owner and

the organization to which this folder can be linked. It is recommended to leave it without changes for now and concentrate on the document hierarchy creation (item 1). The access rights configuration is described in next section "[Setting Access Rights for Documents](#)".

Create other root folders and subfolders the same way. As a result you will have a hierarchy of documents storage close to documents structure existing in the company. Next stages of setting up the work with documents will be [configuration of access rights](#) and [adding company documents archive](#).

After creating the structure of documents, configure the access rights to folders according to the results of documents flow analysis. To do it, edit a created folder with the help of the "Edit" button. Enter the "Permissions" tab in the appeared window to set up the access rights.



Edit folder

Inherit permissions of the parent folder

Forbidden	View	Edit	Administration
+ Add	+ Add	+ Add	+ Add
	Everyone	Sales Department	John Smith
		Marketing	

You can use Drag and Drop at the users list

Owner: John Smith [Change](#)

Organization: Customer LLC [Delete](#) | [Select](#)

[Update](#) [Cancel](#)

If you tick "Inherit parent folder permissions", the access rights for this folder will be the same as for the folder inside which it is stored. So, this function doesn't work for folders created in the root directory.

With the help of the "Add" button you can set up the right for the folder that will be different from the rights for the parent folder. At this stage a familiar window for users choice appears. To delete the whole list of assigned users, use the "Delete all" button. If it's necessary to delete only one user, press the "Delete" button to the right of his/her name. It is also possible to use Drag'n'Drop for moving users between the lists. There are different categories of rights assignment:

- **Forbidden** - it's prohibited to view the folder. This category dominates all others. If a user or a group is in this category, the folder won't be accessible for them, the assignment of other rights doesn't matter;
- **View** - the right for viewing the folder;
- **Edit** - the right to change and add documents;
- **Administration** - the widest rights for folder administration. Users from this list can make any operations with the folder including its deletion.

In the "Owner" field, the folder creator is shown (it is again you). It's possible to change this parameter if necessary with the help of the "Change" button in the end of the line. You can choose a group in the "Owner" field, only one user can be chosen. The owner has the full access to the folder: he/she can observe and edit the documents, can administrate and give others the access rights for the folder.

The "Organization" field was made to link the folder to one of the organizations added to an appropriate module. After the folder was linked to the organization, it will be shown [on a special tab of its profile](#).

After all the information about the folder is filled in and the rights are assigned, press "Create" to

change the access rights. To cancel the operations, press "Cancel" in the lower part of the window.

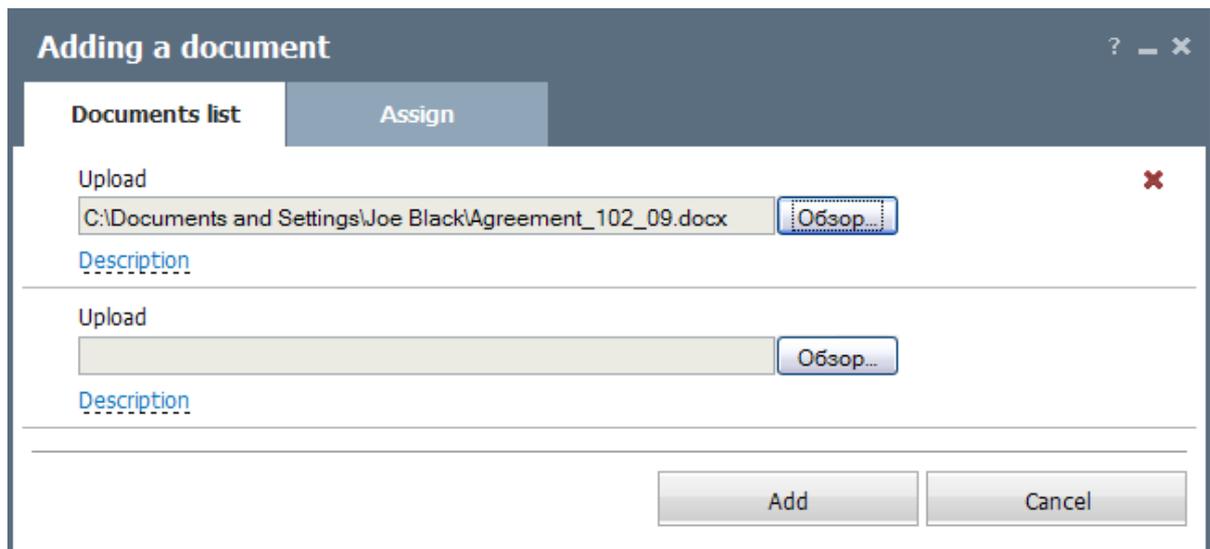
Repeat all these operations for all the created folders with documents.

To begin to work with the "Documents" module, import the archive of the company documents. It can include corporate and private documents of text, image, audio, video and other formats. There are two ways to add documents: manually and [with the help of WebDAV technology](#).

Manual Adding

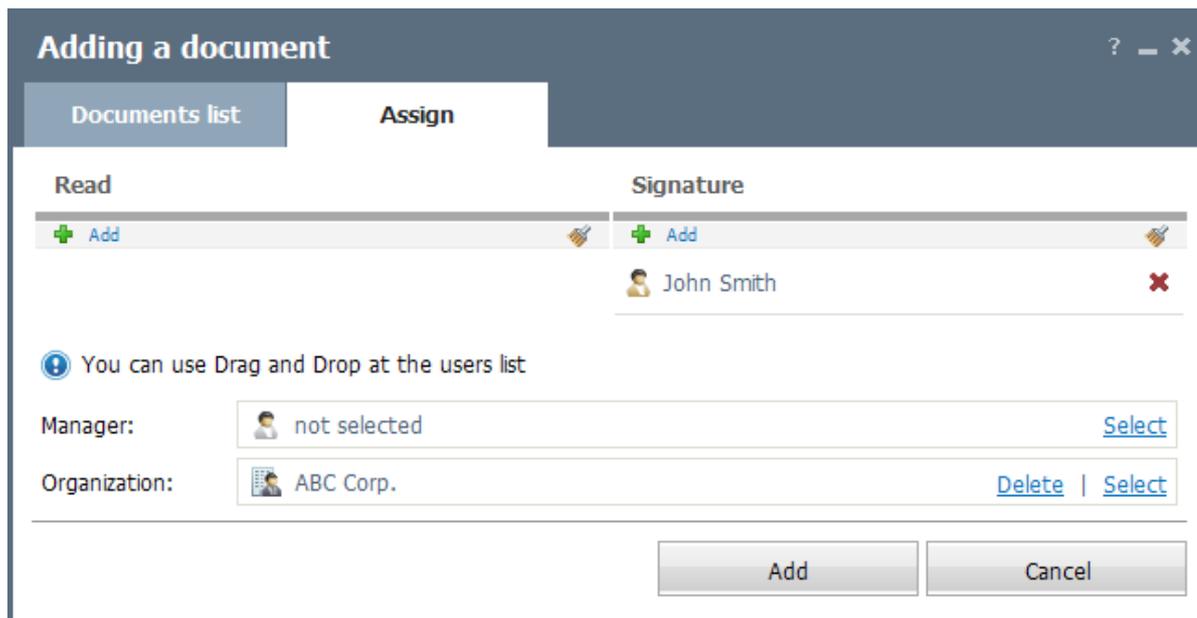
Enter the "Documents" module and choose an appropriate folder (it's impossible to add files in the root directory, it's possible to create only subfolders there). To add a document, press "Add" in the Quick Command panel. After you press it, a window with two tabs appears:

Documents List



Here you choose files for adding. Press the "Browse" button, which is to the right of the field where you indicate file name. Choose the necessary file in the appeared window and press "Open". After it, the selected file will appear in the list below. The "Delete" button (small red cross) will appear to the right of the file name, you can cancel file downloading by pressing it. If you press the "Description" button, a window for comment adding for the file will open. This description will be shown as a tooltip when putting the cursor over this file. To add other documents, use the same scheme.

Assign



Here you can choose users or users' groups who will have to acquaint with the document or sign it. These functions help to know what is happening to documents and to improve the work with them.

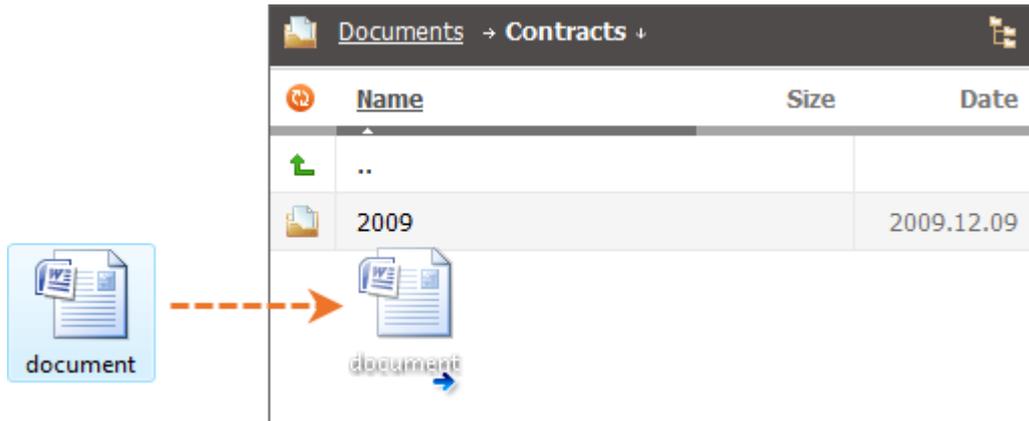
In "Responsible" field one can appoint an employee who will work with it. If the document came from an organization, it can be chosen in the "Organization" field. Naturally, this organization should be [added to the TeamWox system data base](#) first.

One can add users for acquaintance and signing with the help of "Add" and "Delete all" buttons. Use "Select" and "Delete" buttons in the appropriate fields to add or delete responsible person and organization. It's impossible to appoint a document for signing or acquaintance for a user who doesn't have an access to the folder that contains this document.

After entering all information that is necessary for adding a document, press "Add". To cancel, press the button of the same name. When you add a file with exactly the same name as already existing file has, a new version of the file will be written over the old one. File is saved in the history with its earlier version and is always accessible. One can know the file version while viewing the information about a document with the help of the button of the same name.

Drag'n'Drop

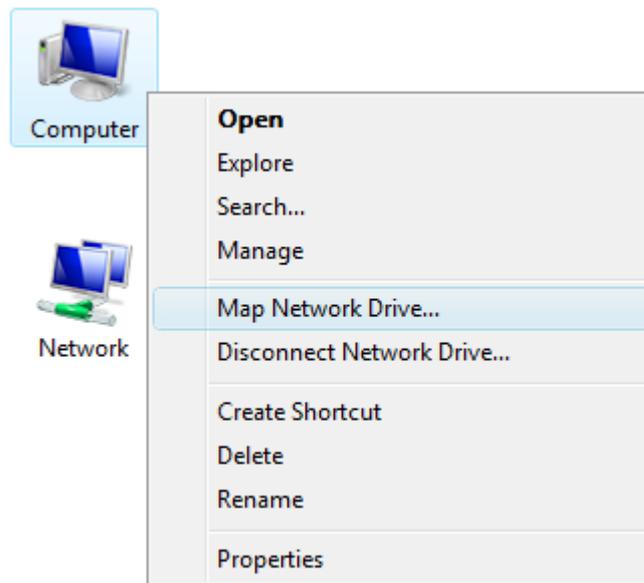
There is a possibility to add documents by dragging them from the desk top or from an explorer to one of the folders in the "Documents" module opened in browser. Use drag'n'drop method for dragging.



This function allows adding any number of documents to the system simultaneously. If the end folder of the "Documents" module has a file with the same name as the one that was added, then the file will be added as a new version. To make this function work, install "Gears" (you can download it here: <http://gears.google.com>) plugin. In Google Chrome this plugin is installed by default.

Adding with the help of WebDAV

It is recommended to use WebDAV to import large archives (of folders and files). The files storage of the "Documents" module can be connected as a network disk (folder) at your computer with the support of the WebDAV protocol in the TeamWox system. This technology allows working with files at the server the same as you work with them on your computer. You can copy, modify and save them preserving different versions.



To import the whole documents archive, connect the "Documents" module file storage as a network folder in your computer. Then just copy all archive documents and paste into the connected network folder.

The operation of the TeamWox files storage connection as a network folder consists of several stages which are described in the following table:

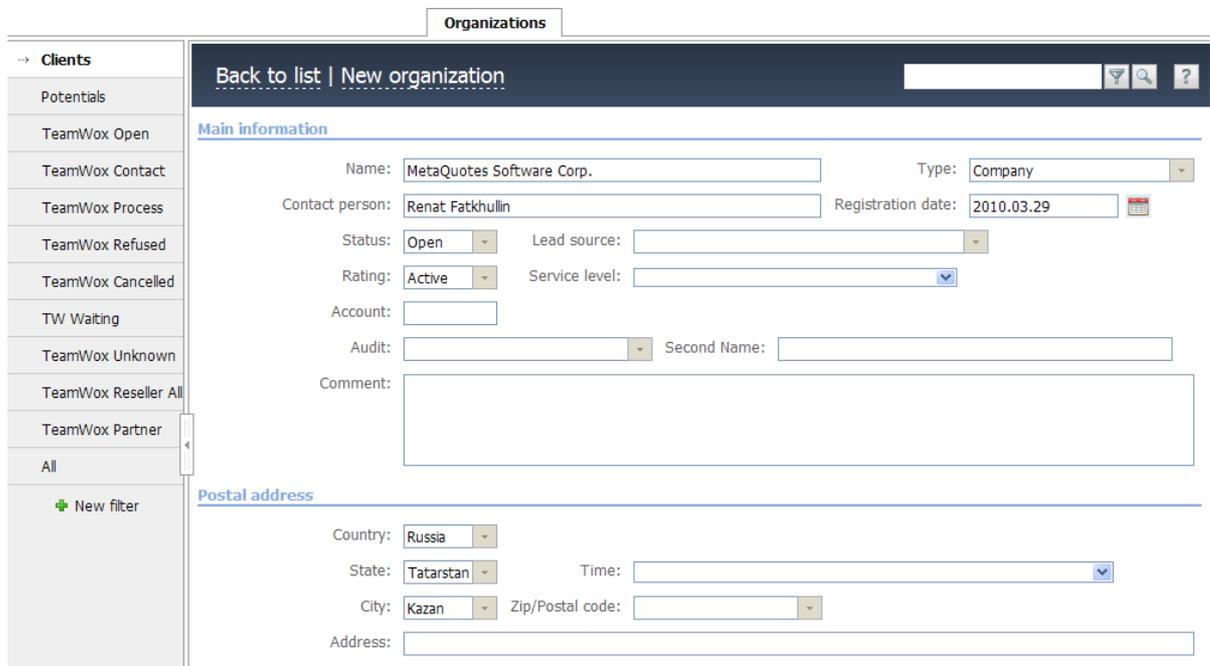
Stages	Microsoft Windows Vista	Microsoft Windows XP	Macintosh OS (Mac OS)
1	In the context menu of "My computer" choose "Connect network disk..."	In the context menu of "My computer" or "Network" choose "Connect network disk..."	In "Finder" run the command of menu "Move -> Connect to server..."
2	In an opened window in "Folder" field enter server TeamWox/webdav, for example: "https://client-domain.teamwox.net/webdav" . "https" has to be indicated in the address by all means.	In an opened window in "Disk" field choose the letter which will be used to indicate the network folder. In "Folder" field enter server TeamWox/webdav, for example: "http://client-domain.teamwox.net/webdav" . "http" has to be indicated in the address by all means.	In an opened window enter server TeamWox/webdav, for example: "https://client-domain.teamwox.net/webdav" . "http" has to be indicated in the address by all means.
3	Press the "other name" link and enter the login and password, which you use to enter the TeamWox system. Then press "OK" and "Done".	Press the "other name" link and enter the login and password, which you use to enter TeamWox system. Then press "OK" and "Done".	Press the "Connect" button and enter the login and password, which you use to enter TeamWox system. Then press "OK".
After that, the net disk with all folders and files in "Documents" of TeamWox will appear on the computer.			
Specifications	Installed patch "Webfldrs-KB907306-ENG" for English OS is required. You can download this patch from web site www.microsoft.com .	Installed set of updates "Service Pack 3" is necessary. The system has to trust SSL-certificate used in TeamWox . If the system uses SSL-certificate from "MetaQuotes CA" (installed by default), it's necessary to install metaquotesrootca.cer file. Its installation was described earlier .	

You can find the instruction with screenshots for WebDAV configuration in the help files (click "?" in the right corner of the Quick Command panel) and on official TeamWox website at: <http://www.teamwox.com/en/teamwox/help/documents/webdav>

"Organizations" and "Contacts" in the TeamWox system are used to manage a unified database of all clients and business partners. They allow you to add any sort of information about organizations and their contract persons, as well as to save work and communication history.

To organize the information on each organization or contact person, the TeamWox system has fields grouped into blocks: "Main Information", "Postal address", "Registered address", "Contact information", "Additional Information", "Permissions". If necessary, you can add custom fields into the system, which allows to set up the system according to the specific needs of each company. The fields are filled out when adding a new organization/contact and can be edited later. You can set up individual filters for nearly every field.

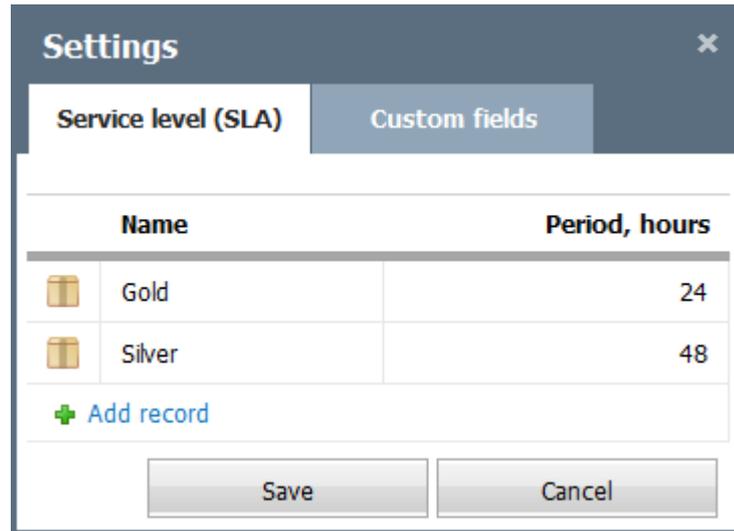
You need to analyze what kind of information about other organizations the company needs. Find out from the client company managers what kinds of information they need. Define the order of completing and possible values for the "Type", "Status", and "Rating" fields for organizations. Find out which levels of service for clients exist in the company to set up the Service Level (SLA) fields.



Before adding organizations to the TeamWox system manage the overall settings of the "Organizations" module, based on the analysis you carried out. In the "Organizations" module, choose "Settings". A window with two tabs will open:

Service Level (SLA)

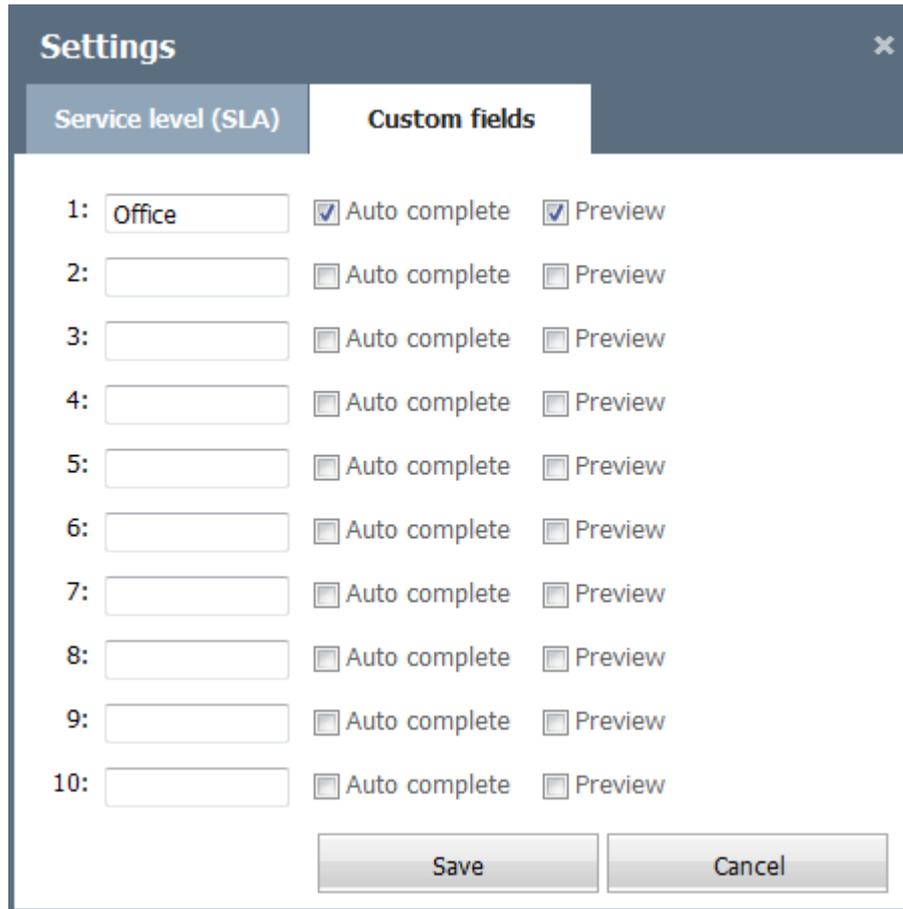
SLA - Service Level Agreement between the organization that provides the service and the user. The "Organizations" module provides the possibility of specifying the time limits for processing the clients requests. When creating a request in the "Service Desk" module and linking it to an organization, the time limit for it will be automatically filled according to the date of creation and the execution terms specified for the organization. For example, you can specify a 24-hour time limit for executing the requests from VIP clients. Then a request from a VIP client, which is created in the "Service Desk" module, will be automatically assigned a 24-hour time limit. The responsible employees will not be able to ignore it. To manage service levels go to the "Service Level (SLA)" tab.



To create a new category, press the "Add record" button. A new line will appear as soon as you do it, specify there the name and the time limit (in hours) for requests execution. To start editing a field, double-click on it. To delete a category, press the "Delete" button that appears if you put the mouse cursor over it.

Custom Fields

It is possible that the default fields will not cover the areas you need. In this case, you can add custom fields to TeamWox (no more than ten fields). Choose the "Custom Fields" tab in the settings' window.



	Service level (SLA)	Auto complete	Preview
1:	Office	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2:		<input type="checkbox"/>	<input type="checkbox"/>
3:		<input type="checkbox"/>	<input type="checkbox"/>
4:		<input type="checkbox"/>	<input type="checkbox"/>
5:		<input type="checkbox"/>	<input type="checkbox"/>
6:		<input type="checkbox"/>	<input type="checkbox"/>
7:		<input type="checkbox"/>	<input type="checkbox"/>
8:		<input type="checkbox"/>	<input type="checkbox"/>
9:		<input type="checkbox"/>	<input type="checkbox"/>
10:		<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

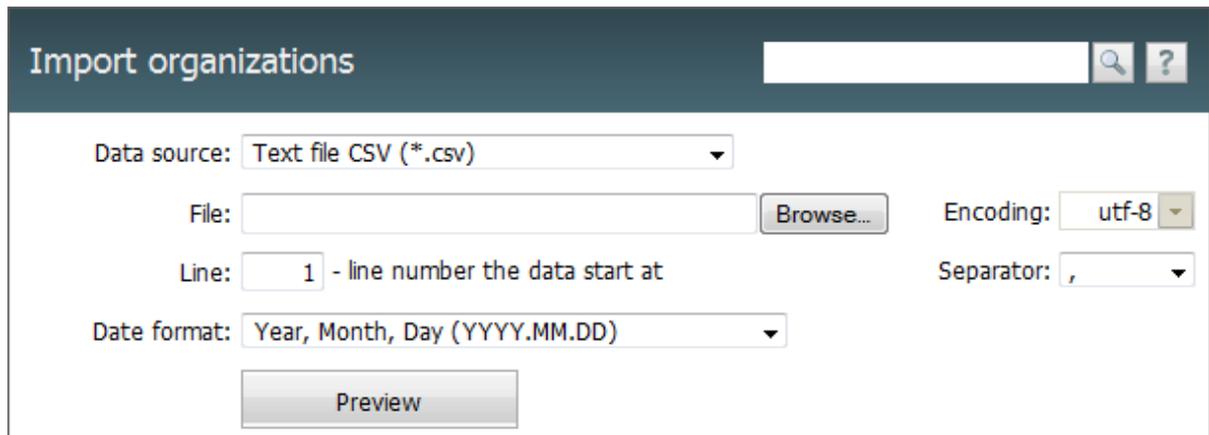
In order to add a custom field, one should set its name in one of the lines of this window and press the "Save" button. All the custom fields are added to the "Main" box of organizations' details.

Once setting up is finished, press the "Save" button. Custom fields will be shown in the "Main" box of organizations' details, and the created levels of service will be available to choose in the "Service level" field while adding or editing an organization.

The TeamWox system allows to add new organizations/contacts, import/export any data about them. To configure the work with organization and contacts, import the list of organizations and contacts. If there is no such a possibility, [enter the information manually](#).

Importing the list of Organizations from a text CSV file

To start import of organizations, press the "Import" button on the Quick Command panel of the "Organizations" tab.



Specify the following parameters in the import window:

- **Data source** - in this field you should specify the format of a file that you're going to import. Only the *.CSV files are supported at the moment. Other file formats will be added in the future;
- **File** - by pressing the "Browse" button, in this field you choose a .CSV file that contains the organization data to be imported;
- **Encoding** - the selection of encoding of the imported file. If the encoding is selected correctly, after pressing the "Preview" button the information will be displayed correctly. Otherwise you will have to select a different encoding and check again by pressing "Preview";
- **Line** - the number of a line the organizations' data start with in the imported file. It is possible that the file would start with several lines listing the name and description of the file, then a line with column names, and then lines with data to be imported. In this case, you should input the number of the line that has column names. They will be shown when viewing data from the file;
- **Separator** - separator that divides different data by organizations in the file (comma, dot or tabulation character);
- **Date format** - the selection of date format in the imported file. The options are: "Year, Month, Day (YYYY.MM.DD)", "Day, Month, Year (DD.MM.YYYY)", "Month, Day, Year (MM.DD.YYYY)".

Once you've specified the parameters, press the "Preview" button. The information from the imported file will be displayed below as soon as you do it. If data are recognized incorrectly, change the parameters and press the "Preview" button again.

Match fields and press 'Done'

	Name	Type	Status	-- Not selected --
	Name	Type	Status	Country
2	ABC Company	Potential	Open	USA
3	BCD. Inc	Client	Open	Great Britain
4	Supplies	Agent	Open	USA

After checking the correctness of data, you should also associate the columns from the imported file with the fields in the "TeamWox" system. The selection of fields is performed above each column that was read from the file. Not associated columns (where "Not selected" is chosen) won't be imported.

When importing organizations you have to input the "Name" field. By this field, the TeamWox system compares the organization being added with the ones already available in the system. This makes sure the organization information is updated instead of being entered twice. Once you've finished checking and matching columns, you should press the "Done" button. The user that imported the organization will be automatically selected as the manager for that organization.

Adding Organizations Manually

First, input all the information about the company that ordered the TeamWox system (your client). This is necessary for working with the "Accounting" module. When creating [invoices](#) or [payments](#) it is necessary to choose the "Supplier" and "Recipient" fields. These can only be chosen from the list of organizations added to the TeamWox system. Therefore, company employees need to be able to choose their own organization from the list.

Then add other companies that have not been imported. To add a new organization you need to press the "New Organization" button in the Quick Commands bar. Organization editing window will open. Here you need to input information about the organization being added, separated into the blocks "Main Information", "Postal address", "Registered address", "Contact information", "Additional Information", "Permissions".

Organizations

Back to list | New organization🔍
?

Main information

Name: Type:

Contact person: Registration date:

Status: Lead source:

Rating: Service level:

Account:

Audit: Second Name:

Comment:

Postal address

Country: State: Time:

City: Zip/Postal code:

Address:

To add an organization, fill in the "Name" field in the "Main Information" section. The name must be unique as the TeamWox system creates a unique identifier (CID, the identifier with a control sum) according to it. It will be a permanent link to an organization, which is shown to the left of organization name with the "#" sign.

Permissions

Manager:

Assigned:

Leave the "Permissions" section with no changes, it's more comfortable to fill it in after manual adding and import of all organizations and contacts. A detailed description of work with rights is shown in ["Setting access rights to organizations"](#). Press "Save" in the lower right corner of the working area to finish the work. After adding all contractors, it's necessary to [add information about all contacts](#) with the links to organizations.

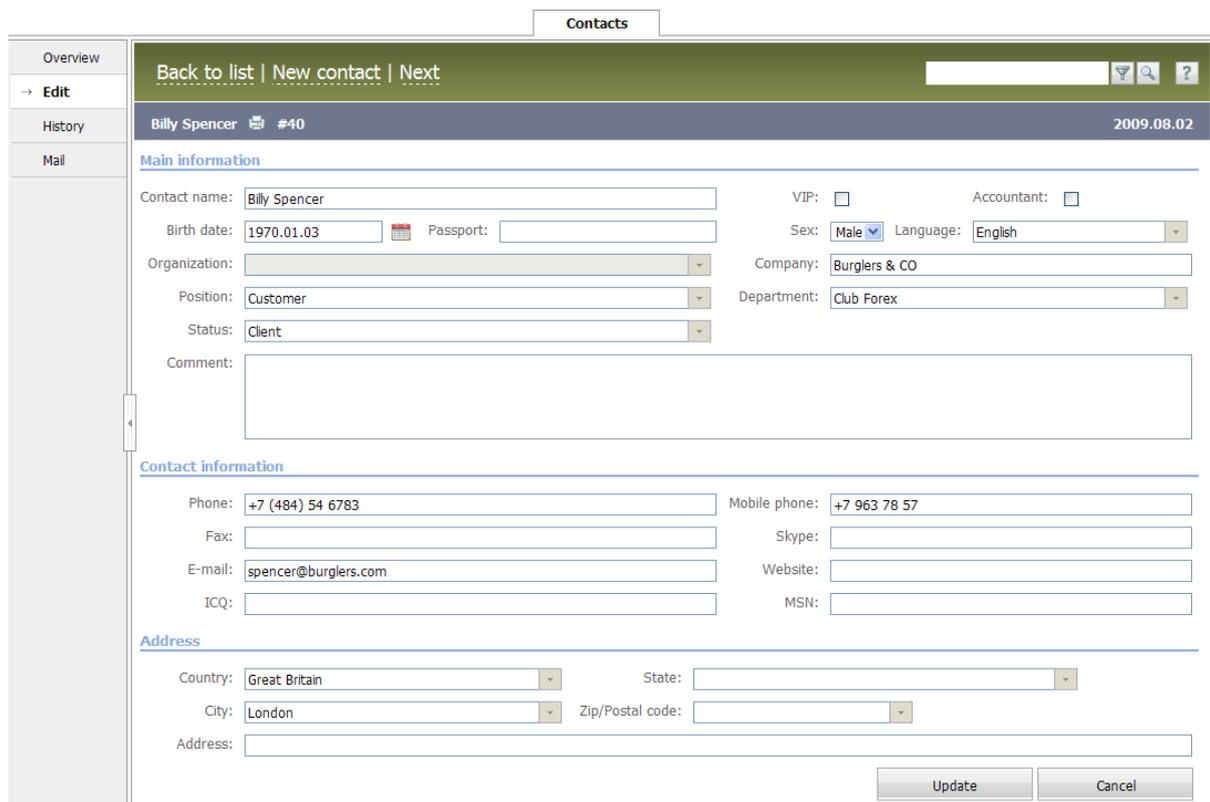
The "Contacts" module is connected closely to the "Organizations" module. It shows all the company contacts that can be linked to a certain organization. The look and functions of this module are similar to the "Organizations" module. It was made for storing information about contacts, work and correspondence history.

Import of a Contact List from a CSV File

To begin to import contacts, press the "Import" button on the Quick Command panel of the "Contacts" module. [The process of contact importing is the same as the import of organizations](#), which was described in the previous section. Fill in the appropriate fields and press "Preview". Fill in the "Contact name" field while associating columns. Unlike organizations, here if two contacts of the same names are added to the system, both of them will be saved. When checking and fields association are finished, press "Done" and information about contacts will be imported to the system.

Adding Contacts Manually

You can add contacts to the TeamWox system manually. To do it, press "New contact" in the Quick Command panel of the "Contacts" tab. In the opened window you'll see informational fields about a contact with three sections: "Main Information", "Contact information", "Address".



The screenshot shows the 'Contacts' form for a contact named Billy Spencer. The form is divided into three main sections: Main information, Contact information, and Address. The 'Main information' section includes fields for Contact name, Birth date, Organization, Position, Status, Company, Department, VIP, Accountant, Sex, and Language. The 'Contact information' section includes fields for Phone, Mobile phone, Fax, Skype, E-mail, Website, ICQ, and MSN. The 'Address' section includes fields for Country, State, City, Zip/Postal code, and Address. The form also has 'Update' and 'Cancel' buttons at the bottom right.

To add a contact to the TeamWox system, indicate the contact's full name (name, surname) in the "Contact name" field in the "Main information" section. Several contacts with the same names can be created in the system. Fill in all other fields and choose necessary options:

- **VIP** - switch on this option if the contact is very important for the company. In the list the contact's icon will be golden unlike usual contacts;
- **Accountant** - switch on this option if the person is an accountant on the company and is responsible for bills operations. Accountants are shown with the blue icons in contact list. This field is

connected with the "Accounting" module, therefore in TeamWox system it's comfortable to send invoices to e-mail of company-contractor's accountant;

- **Birth date** - indicate birthday with the help of the drop-down interactive calendar. This will help not to forget, for example, VIPs' birthdays and to congratulate them in time;
- **Gender** - indicate the contact's gender. This helps if, for example, you need to send congratulations with International Women's day by e-mails only for women. And also to make correct form of address automatically during mass work with messages and mails templates;
- **Language** - from the drop down list choose the language for communication with this contact. It will help to avoid problems with language while talking to this contact;
- **Organizations** - if the contact works in the company that was added to "Organizations" module, it's necessary to make an appropriate link. Click on this field and choose the organization from the list. If the contact is not linked to any of organizations, choose "None". Linked contacts will be shown in the profile of the appropriate organization. If this field is not filled in, the contact will be considered as private and will be unavailable for other system users;
- **Company** - this field is an additional and a text one. If in "Organizations" module there is no an appropriate company, you can indicate contact's company here. But the contact won't be linked to any organization from "Organizations" module of the system. The company name indicated in this field will be just for information;
- **Department and Position** - indicate contact's department and position. It will help a manager to know the status and responsibility of the contact;
- **Comment** - this field is for additional information about the contact. If it's necessary, in text form it's possible to indicate, for example, person's hobbies, for a VIP - a list all presents that were already given in order not to repeat them in the future, indicate knowledge of foreign languages or loyalty to some certain products or organization. It will help to make the communication more successful.

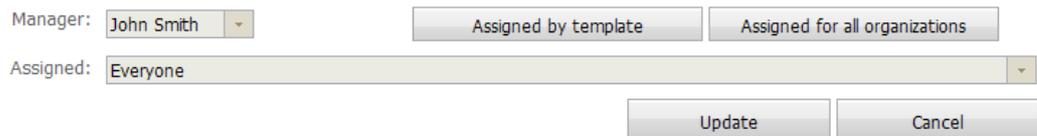
In "Contact information" section indicate phone numbers, messengers, web site, e-mails, fax, etc. for a quick connection. In "Address" section put the address for paper correspondence (country, city, post code, street, etc.).

To save the contact, press the "Save" button in the lower right corner of the working area. The same way add all contacts of the company. Press "Cancel" or "To the list" to cancel the addition and to return to contacts list.

After organizations were added, configure the access rights to organizations according to the company's security policy. Access rights to contacts that are linked to organizations will be the same as to organizations and bordered automatically. Access rights to other contacts are not configured. If the contact is not linked to any organization, it's unavailable for other system users and in the list are shown with the "Private" icon.

Set up access rights to all organizations created in the TeamWox system. Choose an organization by pressing its name in the "Organizations" module. In the appeared organization profile, select the "Edit" tab in the navigation. The "Permissions" section is in the lower part of the working area.

Permissions



Manager:

Assigned:

Permissions to view and edit information on the organization are shown here ("Manager" field). Users who can view this organization are also assigned here ("Assigned" field). Several employees, groups and departments can be indicated in this field.

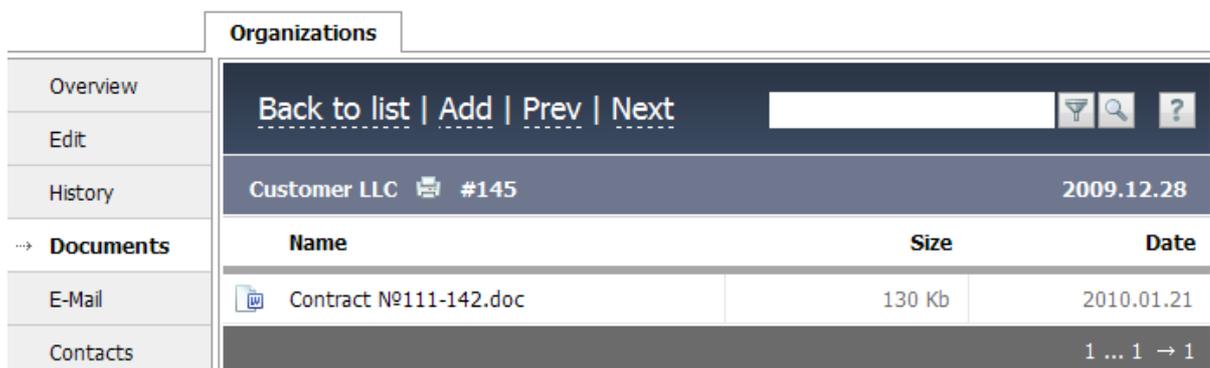
There is a possibility of automation of users assignment for viewing the organization for each individual user. Choose the first organization in the "Organization -> All" tab's list (the filter "All" and sorting by name has to be used). After it choose assigned users list in "Assigned" field and press "Save". Then a "Manager" + "Assigned" combination can be used as a template. You just need to press the "Assign by template" button when adding/editing an organization. After it assigned users list will be filled in automatically, and "Assigned" field will also be filled in automatically when new organizations are added by the same manager. It's also possible to set the value of the "Assigned" field to all current organizations of certain manager by pressing the "Assign for all organizations" button.

Adding and information editing rights for users are configured by the Administrator in the "Organizations" module of TeamWox. To do it, enter a user's profile in "Administration -> Users" and open "Permissions". Tick "Allow" in the "Edit information" function of the "Organizations" section. [Configuration of users' access rights to system recourses was described earlier.](#)

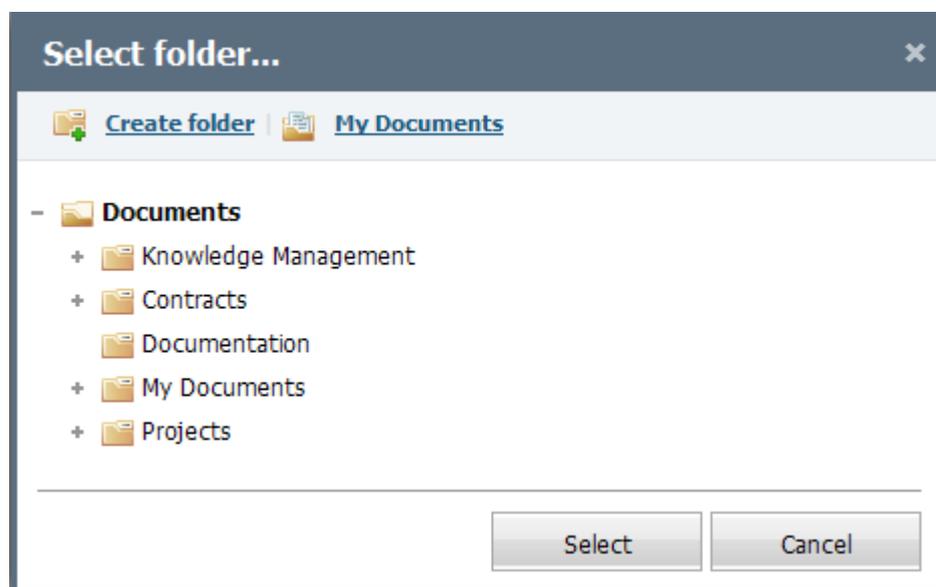
At next stage you need to link documents (files/folders) with organizations. Link all current contracts of client company with contractors. There are two ways of how to link documents to an organization: from the "Organizations" module or [from the "Documents" module](#). All documents will be saved in the "Documents" module of the TeamWox system regardless of the way of linkage.

Link Documents from the "Organizations" Module

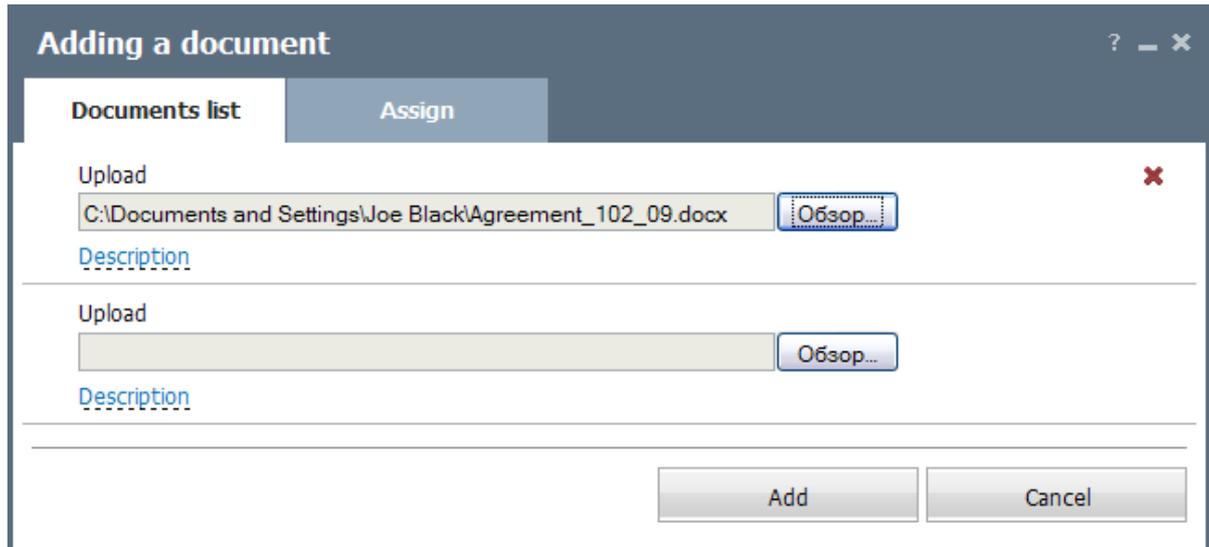
Enter the "Organizations" module and choose a necessary company. In the appeared organization's profile choose the "Documents" tab in navigation. Here press the "Add a document" button on the Quick Command panel.



If the document is linked for the first time, the "Select folder" window will appear. Choose a folder here and press "Select". It will be a place where all added documents connected to this organization are stored. It's recommended to create a separate folder for this organization with the help of the button of the same name in the upper part of the window.



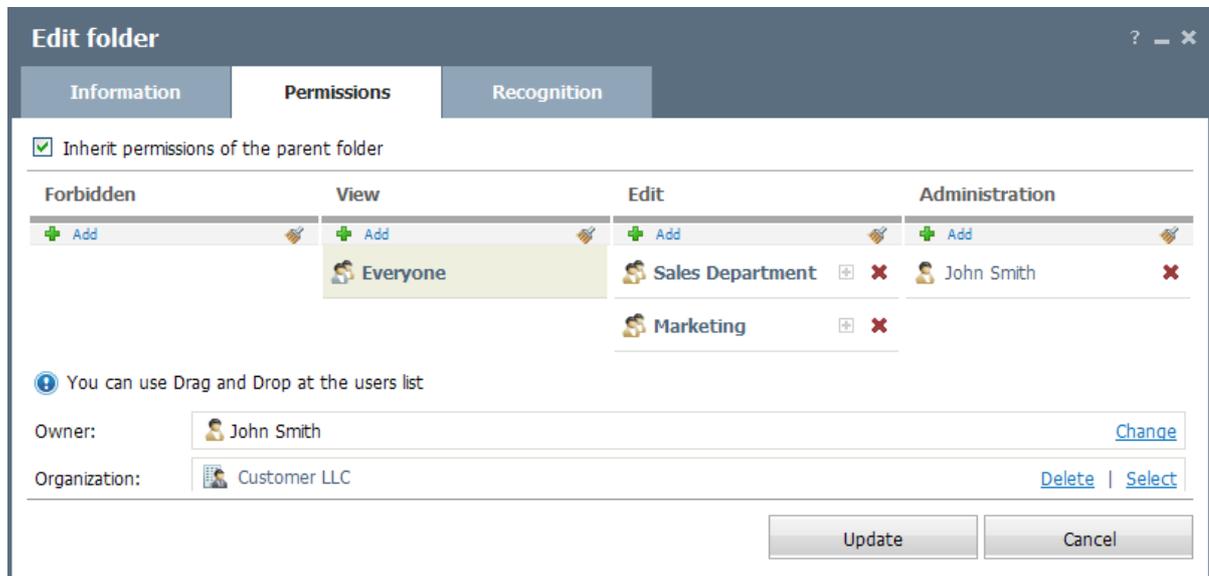
After a folder was chosen, the "Add a document" window with two tabs: "Documents list" and "Assign", will open.



Choose one or several documents in the "List" tab and users who have to read or sign the document in the "Assign" tab. After you press the "Add" button, the document will be linked to the organization and saved in the earlier chosen folder.

Link Files/Folders from the "Documents" Module

If it's necessary to link a folder to an organization, open the folder editing window in the "Documents" module with the help of the pop-up "Edit" button:



Go to the "Permissions" tab in the appeared window. Then press "Select" in the "Organization" field and select the necessary company (it has to be created in the TeamWox system). Press "Save" to make changes work.

If it's necessary to link a file to an organization, open the file information viewing window in the "Documents" module with the help of the pop-up "Information" button:

Documents

→ **Information**

Versions

History

Back to list | Download

🔍 ?

Contract №111-142.doc 📄 #41

Name: [Contract №111-142](#) (.doc / 130 kb / version 2)

Author: [Alena Grushova](#) / 2010.01.21 **Modifier:** [Alena Grushova](#) / 2010.01.21

Manager: [Alena Grushova](#)

Organization: [Customer LLC](#)

Description: Sale and delivery the system "Skala"

Entity: Out; Contract # 111-142

Duration: 2009.11.19 15:00 - 2010.12.24 15:00

State

User	Read	Signature
Andrey Pozharov	📄 2010.01.21 12:56	
Almaz Minaev	📄 2010.01.21 12:56	
Artem Korneev		📄 2010.01.21 12:56

Permissions

Forbidden	View	Edit	Administration
Department of			John Smith

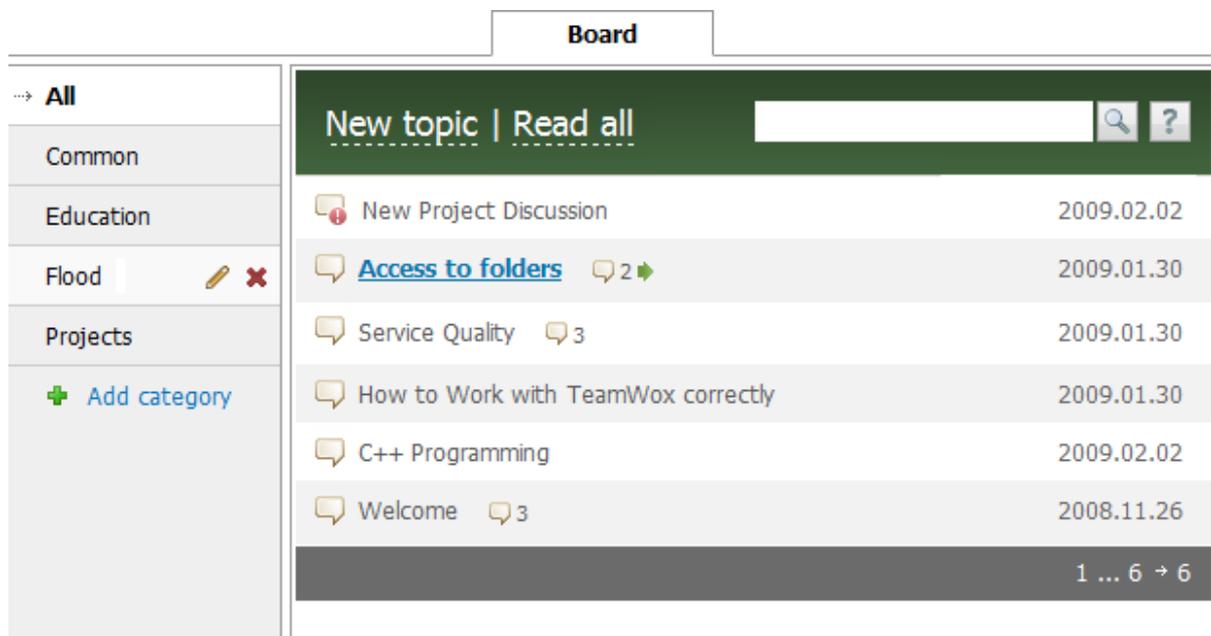
Choose a necessary organization with the help of the pop-up "Edit" button to the right of the "Organization" field. The document will be linked to this particular organization. After it, this file will be available from the organization's profile.

Link all the necessary files and folders (contracts and other documents) to all organizations in the system.

TeamWox board is designed for organizing discussions and publishing messages by all the system users. It is the best place for the internal PR, which allows to acquaint all employees with news and the company policy, organize free communication of managers with personnel. It's possible to create close sections to discuss different questions with a limited number of people. For example, with the help of [closed topics](#) it's possible to have a closed conference between managers.

To set up the "Board" module, you need to set up board categories according to your client's needs. First, you need to select names of the categories and who will have permissions to access them. Discuss the future board categories with the company administration and the marketing department: verify the category names, probable topics and users for each category.

Enter the "Board" module, in the navigation bar there is a list of all board categories. Initially there are only two categories here: "All" (this shows topics from all the categories a user can access) and "Common" (the settings of this category can be edited).

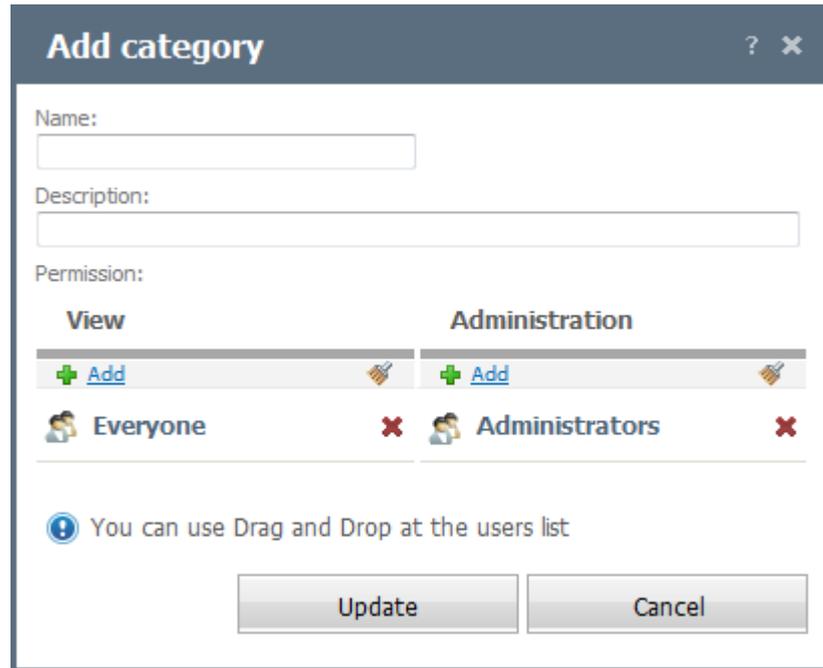


The screenshot shows the "Board" module interface. On the left is a sidebar with a list of categories: "All", "Common", "Education", "Flood", "Projects", and "Add category". The "Flood" category is currently selected. The main content area displays a list of topics under the "All" category. The topics are:

Topic	Date
New Project Discussion	2009.02.02
Access to folders (2 replies)	2009.01.30
Service Quality (3 replies)	2009.01.30
How to Work with TeamWox correctly	2009.01.30
C++ Programming	2009.02.02
Welcome (3 replies)	2008.11.26

At the bottom of the topic list, there is a pagination bar showing "1 ... 6 → 6".

Create necessary categories for TeamWox users. To do this, you should press the "Add Category" button, located under the list of categories. As soon as you press the button, this window will appear:



The following fields should be specified here:

- **Name** - type the name of the category;
- **Description** - specify a short description to the category. It will be displayed as a pop-up help if you point the cursor of your mouse over the category name;
- **Permissions** - use this window to specify, which users can view and administer the category. Users who have the administration rights can edit (change name, description and rights) and delete the category. Nevertheless the administration right does not give the access to observe topics in it. A user should have the "View" permission for it. You can assign or delete rights for all users using the "Add" and "Delete all" buttons. User that created a category has the default rights to administrate it. TeamWox administrators can see the names of all user-created categories on the board. But if they don't have the "View" permission they will not be able to see the topics in that category. If no one has rights to administrate a category, the system automatically gives it to TeamWox administrators.

After filling in the fields, press "Update" to add a category. If you press "Cancel", you'll move to the previous window and the category won't be created.

You can edit a category by pressing the "Edit" button that appears to the right of the category name if you put the cursor of your mouse over it. Next to the "Edit" button there is also the "Delete" button that appears only, if there are no topics in the category. So, to delete a category, you should previously delete all the topics from it. To do this, put your mouse cursor over the topic name. The "Delete" button will appear on the right. When viewing a topic, the Quick Commands bar also has a "Delete" button.

Creating Private Categories

You can create private categories on the TeamWox board. This means that the topics in these categories will only be visible to the users who have the "View" permission. Everyone else will not be able to see the names of these categories and their topics. TeamWox administrators and users with administration permissions will only be able to see category names.

Private categories are useful for having discussions that only some users should have access to. For example, these could be company's top managers discussing the company policy.

To create a private category, press the "Add Category" button. Put the Name and Description of the category in the appropriate fields, then delete all users from the permissions field using the "Delete All" button. Then using the "Add" button, assign permissions to view, comment on, or add/delete topics in this category.

For each closed category you need to assign an administrator who will be able to edit permissions for other users. For example, for the top-level discussions category the administrator could be the CEO himself. In this case, his name will be selected twice: in columns with "View" and "Administration" permissions. To set up the Administration permissions press the "Delete" button in this column. Then use the "Add" button to add the user who will be responsible for administrating this category.

To create the category press the "Update" button. The private category will only be visible to users who have the viewing or administration permissions. Only the users with "View" permissions will be able to see topics in the category. Create all the other private categories the same way.

Attention: In this system, permissions can only be edited for categories as a whole, not for subjects within categories.

Creating Topics

After setting up all board categories, create several topics in them. For example, in the "Common" category you can add a topic that describes how to use the board, or a "Greetings" topic that welcomes new users.

To create a new topic, press "New Topic" in the Quick Commands bar. This window will appear:

Back to list  

Subject: 

Category:

HTML                     

Normal text **B** U *I*      

Dear Alena,
Happy Birthday, we hope your day went well.

Best Wishes
From all the team.



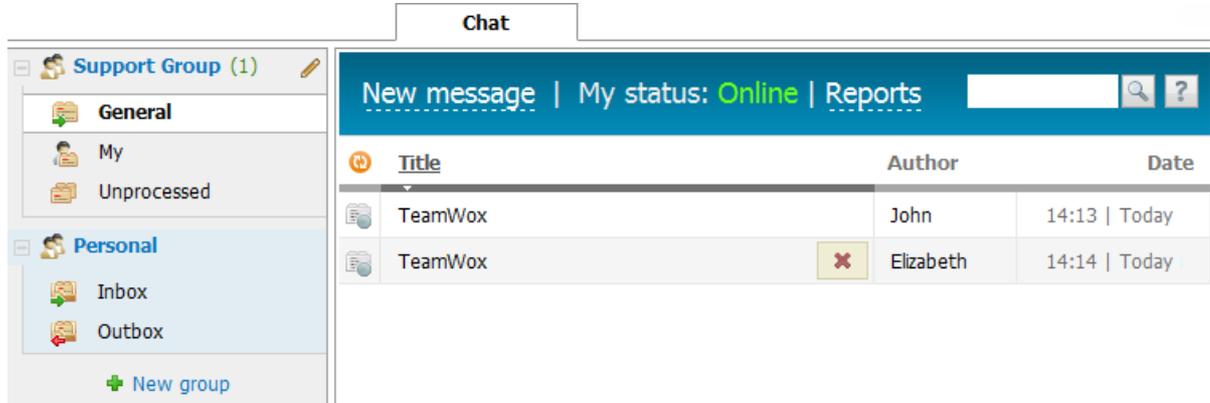
 [Attach file](#)    

[Clear attachments list](#)

Specify the name of the new topic and choose which category it will be created in. The topic can be assigned the "Important" status using the "Priority" button - . Put in a message in the topic body using the editor and press the "Add" button. That's it, you've added a new subject! If you press "Cancel" you will be moved back to the list of subjects and a new subject won't be created.

77

With the help of the "Chat" module, employees can communicate with each other and company clients over a protected network not worrying about information leak. There is no need to set up the chat in order that system users can exchange messages. Here the "Private" group where all sent/received messages are saved exists initially for each user.



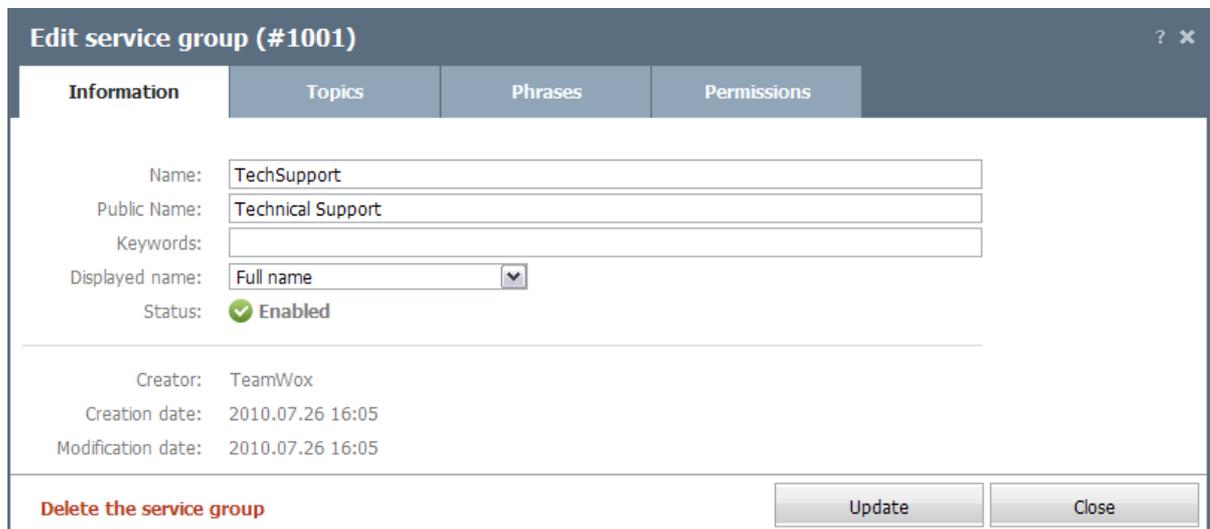
The chat is connected with the web site and it makes the communication between users possible. The "Chat" module acts as on-line assistant for web site visitors. Here configuration means creation of service groups and groups of integration of the "Chat" module with a web site.

To do it it's necessary to assign service groups with marketing and technical support services. For example, it's possible to set service groups by technical support languages, by different web sites or by categories of serviced products. Think about discussion topics only of informational character for additional grouping of messages for each group. The list of discussion topics will be accessible for clients before they begin the conversation. For example, if you choose service groups division by languages, you can choose company products as topics for discussion.

After you assign service groups and topics for discussions, it's necessary to choose responsible employees. They will administrate these groups, answer visitors' requests or just view them.

Creating Service Groups

Create service groups in the "Chat" module of TeamWox. Press "New group" in the module navigation. After you do, a new window appears:

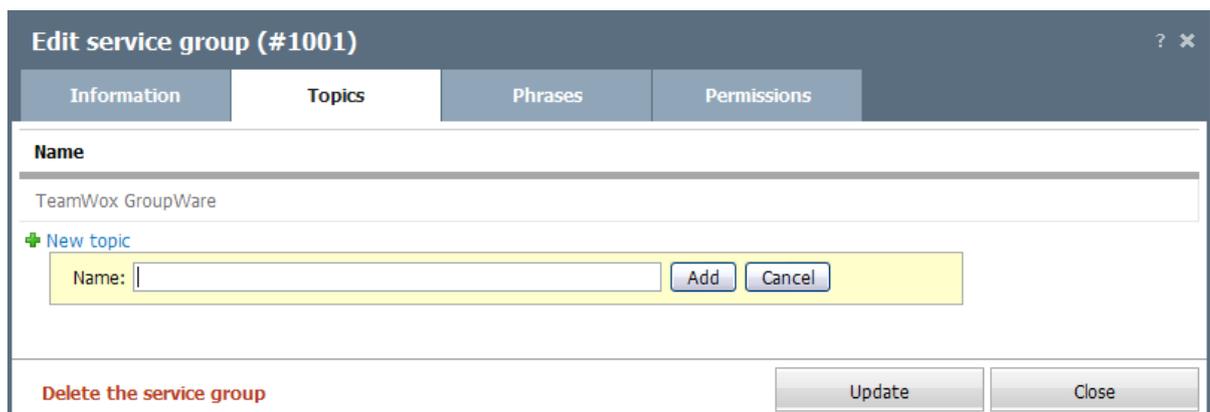


In the "Information" tab fill in the following fields:

- **Name** - set the group name that TeamWox system users will see on the panel of the "Chat" module navigation;
- **Public name** - set the group name that will be shown on client's side on a web site;
- **Keywords** - specify here keywords by which the system will recognize automatically the service group when the chat is opened from the web site. You can type several keywords separated by comma, space or semicolon. For example, if there are two web sites devoted to different products, but there is only one service group for them, it's necessary to indicate key words in the field of the same name. For example: "product1, product2". The same words have to be written in the HTML-file of every web site. Then requests from both web sites will come to one service group;
- **Displayed name** - set here how names of employees, who take part in dialogues, will be shown on the client's side. Choose an appropriate variant from the drop down list in this field. Possible variants: "Full name", "Name", "Hidden" (instead of employees' names the clients will see the word "Manager");
- **Status** - you can switch on/off a service group using this button. Switched off topics will still exist in the system but won't be reachable for employees and clients. It's possible to activate this group with all its settings in the future;
- **Creation date** - shows the date when the service group was created;
- **Modification date** - shows the date of the latest change that was done to the service group;
- **Creator** - shows the name of the user who created this group.

Topics

In the "Topics" tab, add discussion topics that will be available to clients before the beginning of discussion. To do it, press the "New group" button. In the appeared section type the topic name and press "Add". After it a new topic will appear in the list and will be available to clients on the web site and the TeamWox system users. You can change the topic name or delete the topic with the help of "Edit" and "Delete" buttons.



Edit service group (#1001) ? x

Information **Topics** Phrases Permissions

Name

TeamWox GroupWare

+ New topic

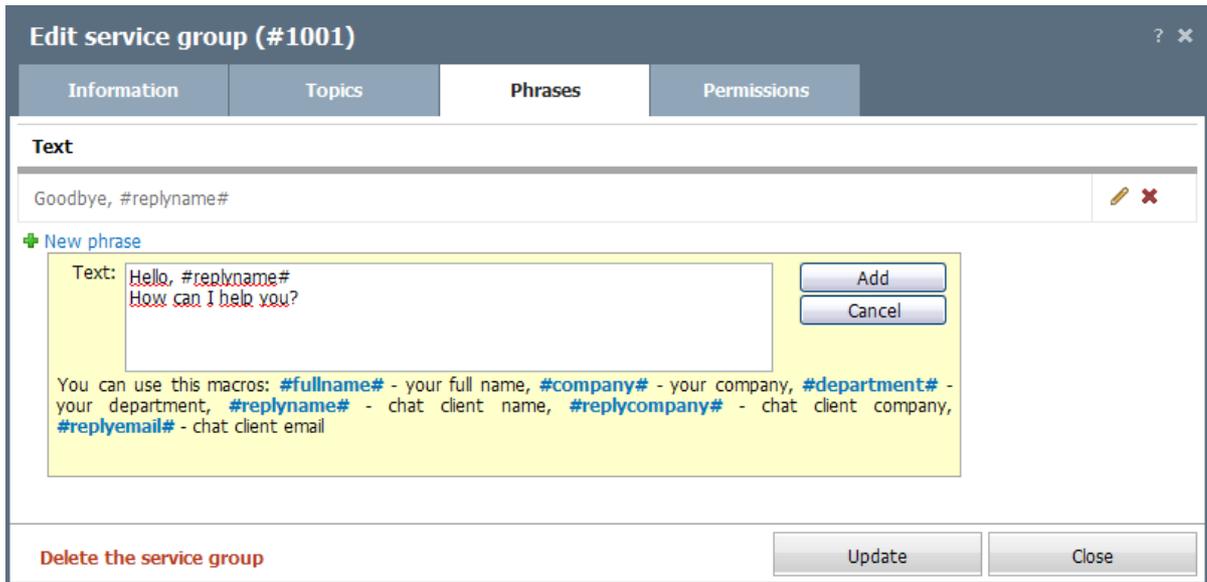
Name:

[Delete the service group](#)

Phrase Templates

In the "Phrase" tab create templates of answers in dialogues for quick reacting to messages from web site visitors. These may be the standard greetings or answers for frequently asked questions. After you created phrases, an additional "Select the commonly used phrases" button will appear in the dialogue

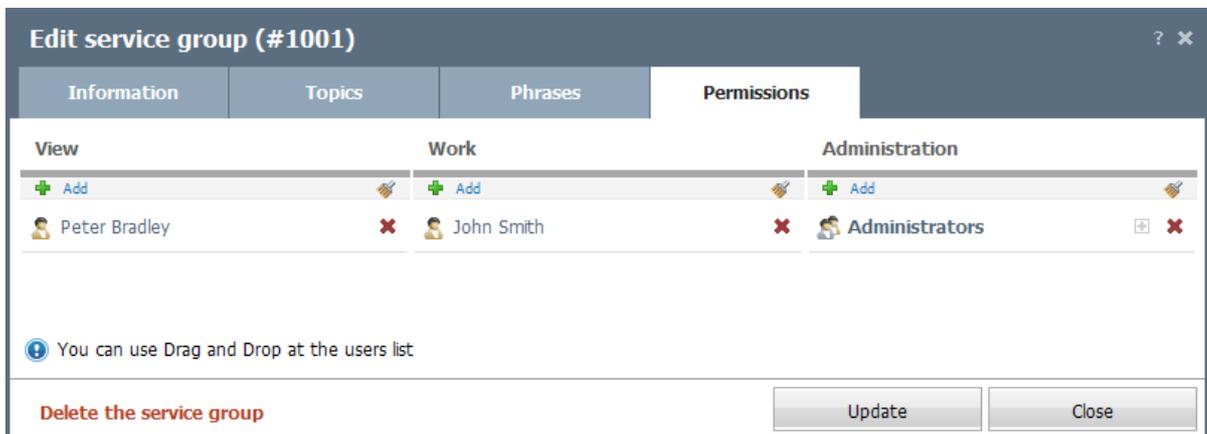
window, by this button you can select a pre-prepared message. To create a phrase, click "New phrase."



After that a box will appear where you need to enter text of the phrase. You can use there special macros, as shown in the lower part of the tab. For example, if you type the phrase "Dear # replyname #," then during the dialogue the system will automatically change the word-macros to the responded client's name. To add a phrase or cancel this operation, press the button of the same names.

Access Rights

In the "Permissions" tab, it's necessary to set up the rights for appropriate users.



Here there are three categories of rights:

- **View** - one is allowed to view conversations, but can't answer. This category of rights, for example, can be given to the marketing department that will analyze the visitors queries and trace customer's response to a certain company's product. At the same time, the sales department or support service will be responsible for working with clients;
- **Work** - one is allowed to answer client's questions. Add here the employees who will communicate with clients and answer their requests. Only the users with "Work" rights will have icons of informing about awaiting questions in dialogues in the upper right corner of the window. They will be able to react to client's requests immediately;

- **Administration** - one is allowed to edit and delete service groups. For each created service group, indicate responsible employees and give them the administrating rights. Then they will be able to manage groups, for example, to add new phrases and topics. If it is necessary to connect a new member to a service group, administrators will be able to do it.

To add or delete all users/groups, use the "Add" and "Delete All" buttons. To delete a specific user/group, press the "Delete" button to the right of its name.

When all the settings are done, press "Add". A new group will appear in the navigation of "Chat" module. If you press the "Close" button, the group won't be created. To start editing the group, press the pop-up "Edit" button in the navigation to the right to the group's name.

To delete a service group, press "Delete" [in the "Service group editing - Information" window](#). Then a warning about results of deleting the group appears: "The group will be deleted irretrievably with all messages that are in it". You need to confirm the agreement by ticking "I agree to delete the service group" field. Then press the "Delete" button and the group will be deleted irretrievably.

Configure all the service groups that company's employees and its clients need. Then [integrate the chat to the company's web sites](#).

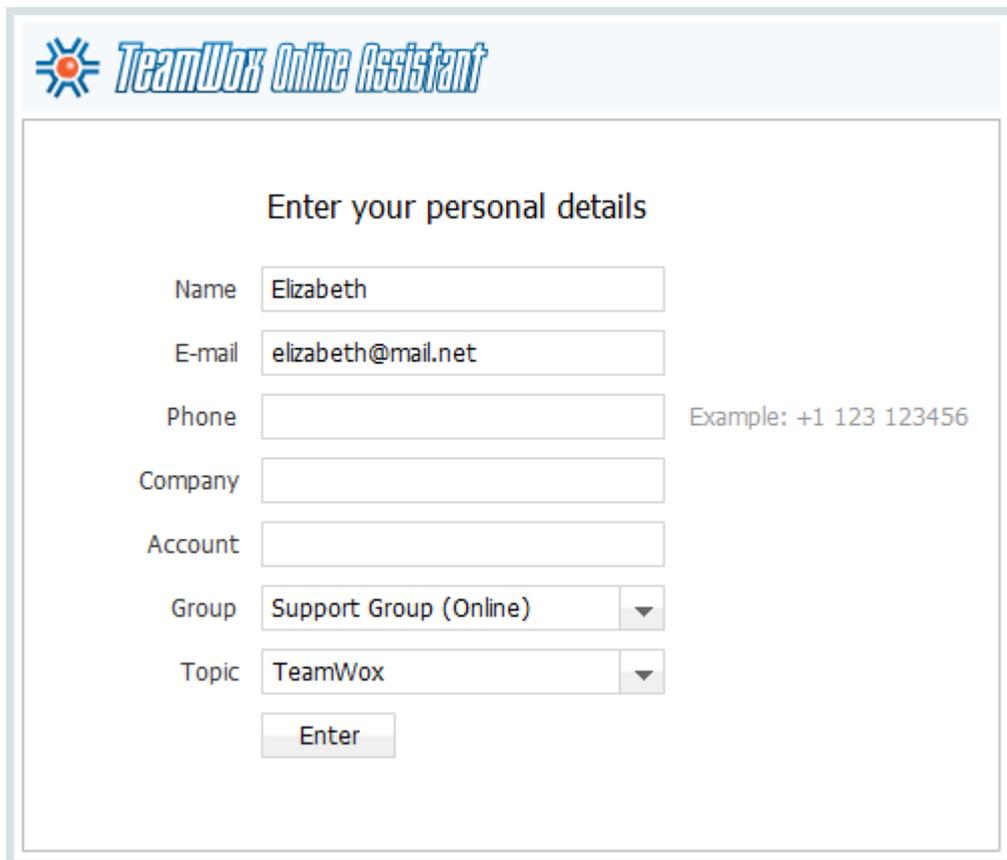
To integrate the "Chat" module, you should place a special HTML-page to a web site, which initializes work of the "Chat" module. With its help, the company's customers will be able to communicate directly with the company responsible employees to solve various problems. As soon as the Chat is connected with other TeamWox modules, the correspondence will be automatically saved in the history of relations with contacts and organizations. To do this, place two files to one directory on the website: "support.html" and "support.swf". You can download a zip with these files [here](#).

Then set up the "Chat" module for a client: the form, opening chat window, entrance window and dialogue window. If one needs to open the chat window from different web sites, it's possible to make accessible only certain service groups. For example, if one service group will process chat requests from visitors of different language versions of the web site or web sites of different products. In this case you need to indicate key words ("ru, en" or "product1, product2") while [group configuring \("Information" tab\)](#) and write these words in the HTML file of each web site.

To open a chat from the page of the web site, place there a link (button) for opening the placed HTML page in a separate window (you can also put a part of the code for chat opening into already existing page of the web site). To do it, use the following construction:

```
<a href="javascript:void(0)" onclick="window.open('support.html','support','toolbar=no,resizable=yes,status=no,menubar=no,location=no,width=600,height=500');">Online Assistance</a>
```

After configuration of integration is done, the client can open a chat from the web site page using a link (button). Before starting the dialogue, he/she needs to fill in the following form:



The screenshot shows a web form titled "TeamWox Online Assistant" with the heading "Enter your personal details". The form contains the following fields:

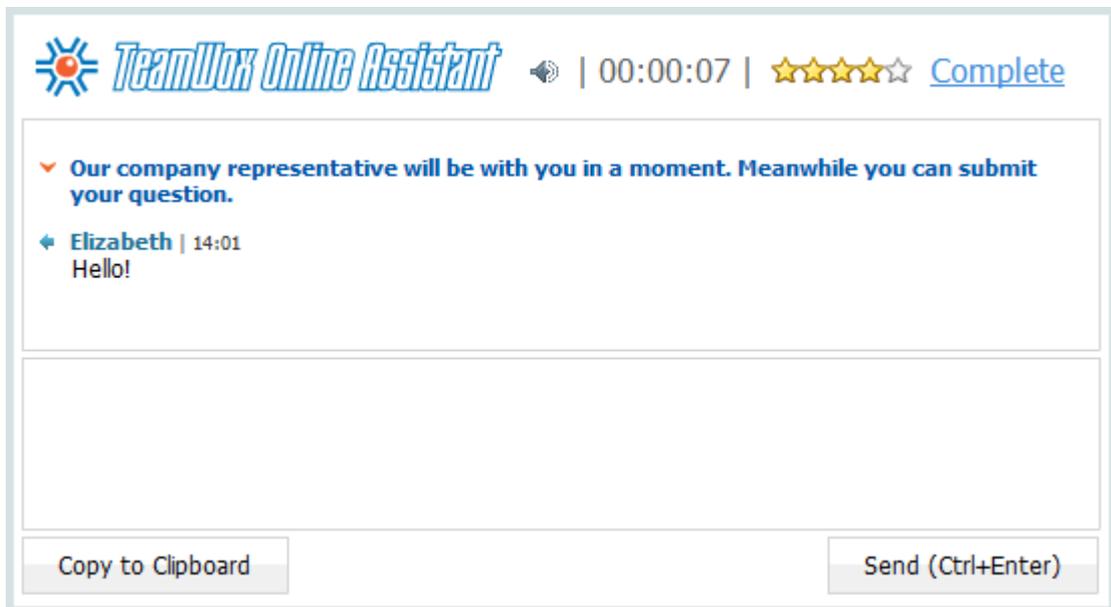
- Name:
- E-mail:
- Phone: Example: +1 123 123456
- Company:
- Account:
- Group: (dropdown menu)
- Topic: (dropdown menu)
- Enter:

In the form the following fields are available to fill in by default. All fields of this window can be set up beforehand (for example, it's possible to display only three fields: "name", "company" and

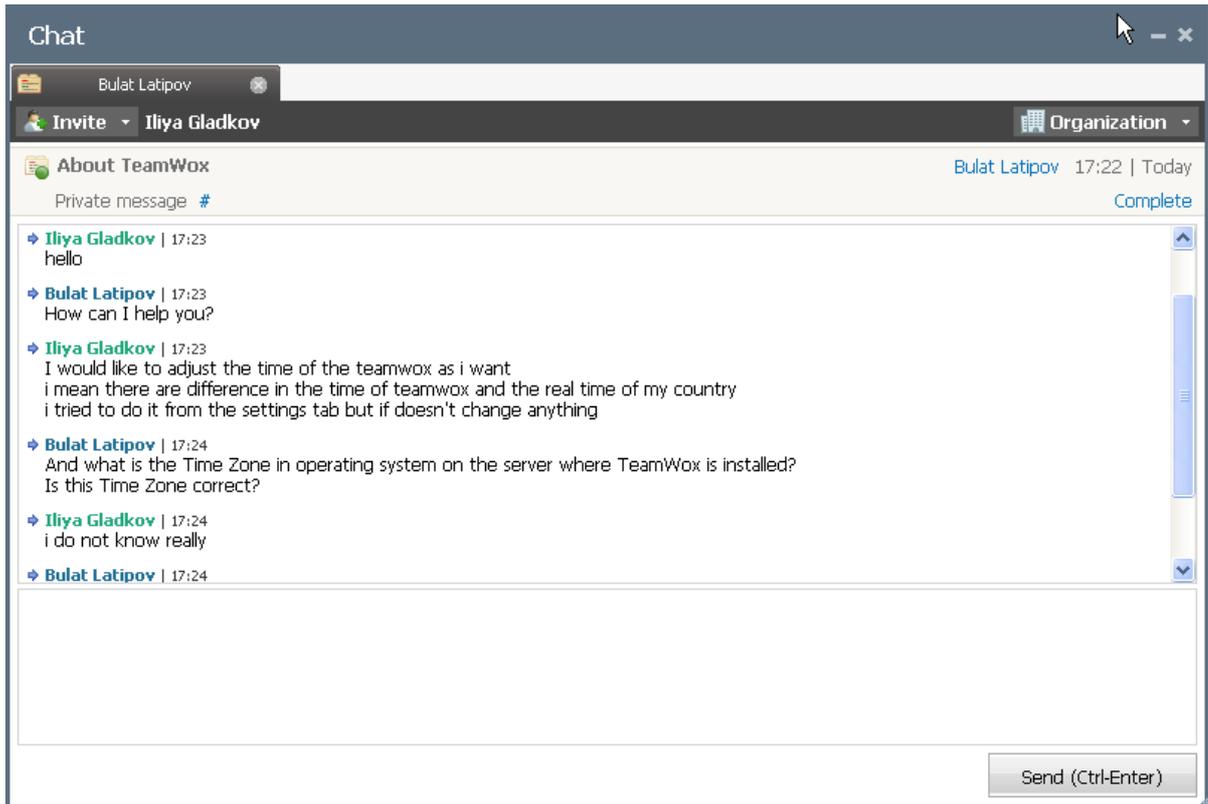
"telephone"):

- **Name** - a client indicates his/her name in a free form;
- **E-mail and Phone** - a client indicates his/her contact information: e-mail address and telephone number;
- **Company and Account** - a client types his/her company's name and, if necessary, account number. This field can be used, for example, to trace a client's accounts;
- **Group and Topic** - here a client chooses name of a service group and message topic from the pre-created lists. It's necessary for quick detecting of the topic of a request and forming a quick answer.

To begin the dialogue, press the "Begin" button which is under the form. Then a client window opens, it's almost the same as the window used in the TeamWox system (there will be no tab of switching between dialogues and a function of sending mails):



On the responsible employee's side this chat will look like this:



A client can stop the dialogue by pressing the "Complete" button in the upper part of the window. The dialogue window on the client's side will be closed and a responsible employee will see a message that the client has finished the dialogue.

Integrate all groups created in the chat with all the necessary web sites. You can find a detailed description of integrating the "Chat" module to web sites in the system help (press "?" in the right corner of the Quick Command panel in the "Chat" module) and on the official TeamWox web site at: http://www.teamwox.com/en/teamwox/help/chat/site_settings.

The "Service Desk" module is intended for creating, planning and controlling tasks with the help of requests. You can work in this module with specially created service groups that include employees responsible for a particular project/product. Like the "Chat" module, "Service Desk" can be integrated to the web site. This will give your customer's clients an additional opportunity to solve their problems.

Service Desk

Software Support

- Open
- Suspended
- Rejected
- Closed

Assigned

- Open
- Suspended
- Rejected
- Closed

[+ New group](#)

New request | Reports

🔍 ?

All
Personal
Assigned
Responsible for
Groups
Filter

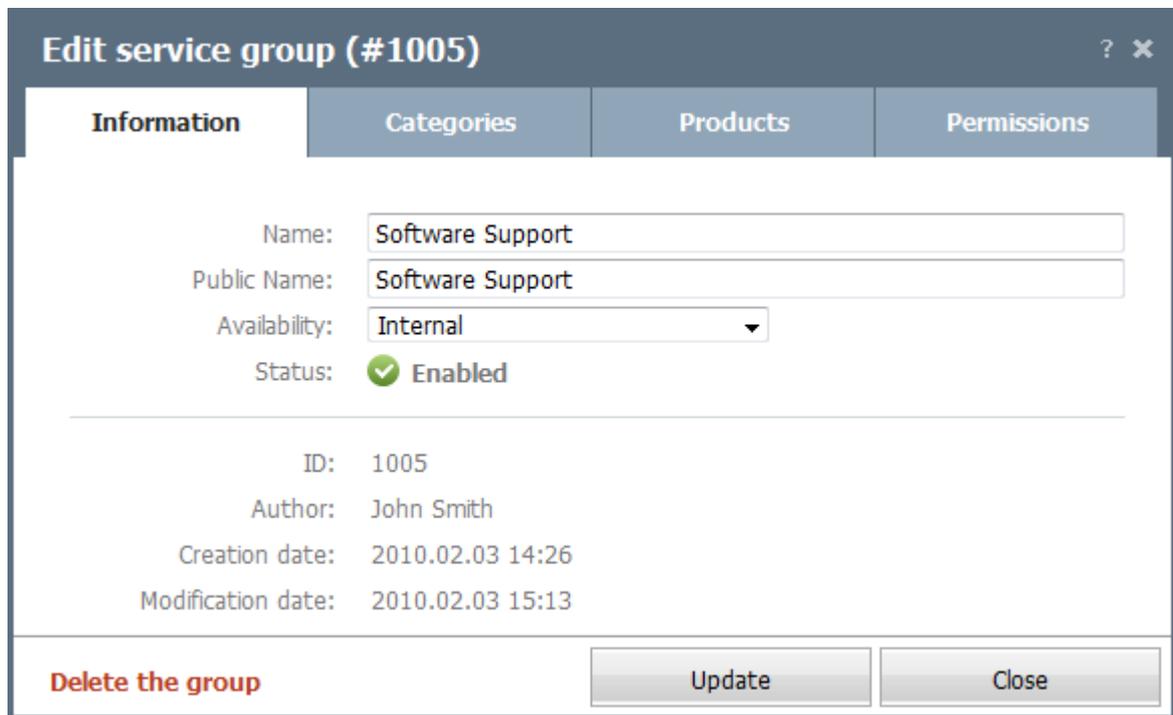
	▶	Title	Product	Category	Creation
🔧	1068	Installation error	Clients manager	Errors	17:01 Today
🔧	1067	Functionality proposal	Clients manager	Suggestions	16:59 Today

Before setting up the "Service Desk" module, it's necessary to analyze and identify the required service groups, decide what the names will be given to the groups and categories of requests, to appoint responsible employees in each group. For example, you can create a "Maintenance department" group to allow employees to make requests for stationary or create a customers support service on some product/service.

To set up the "Service Desk" module means to add service groups and integrate the module to the web site.

To configure the "Service Desk" module you need to set up service groups and access rights to them. The work with groups is concentrated in the navigation of the "Service Desk" module. Press the "New group" button to create a new group in "Service Desk". This will open a new window.

General Information



Edit service group (#1005)

Information | Categories | Products | Permissions

Name:

Public Name:

Availability:

Status: Enabled

ID: 1005

Author: John Smith

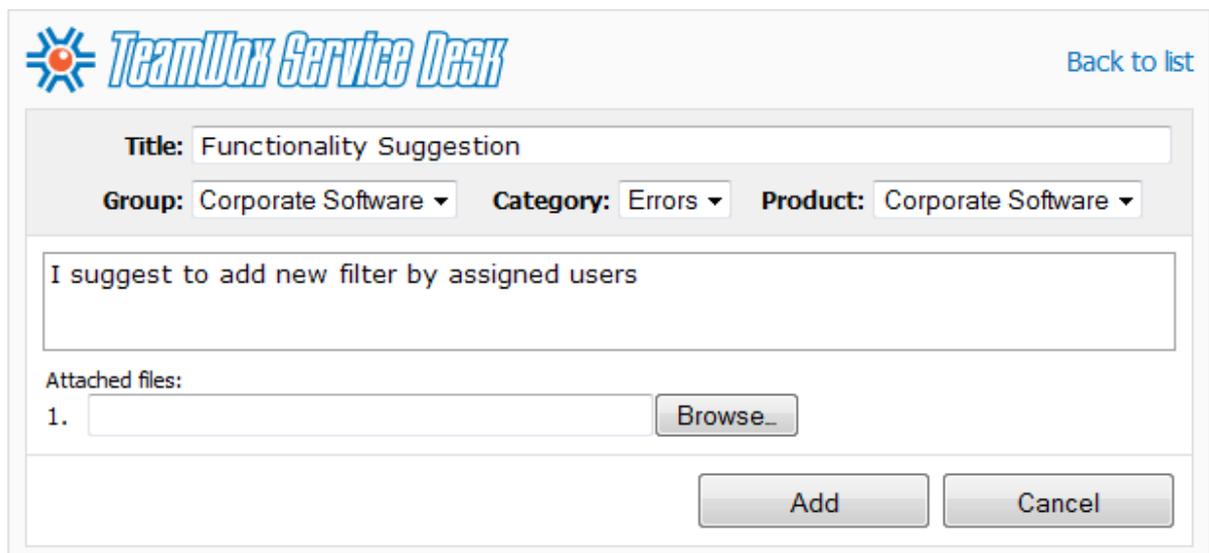
Creation date: 2010.02.03 14:26

Modification date: 2010.02.03 15:13

[Delete the group](#)

In the "Information" tab, set the following parameters:

- **Name** - set the name of the group that TeamWox users will see on the navigation panel of the "Service Desk" module;
- **Public Name** - set the group name that will be seen on the client's side on the web site in the "Group" field. A window of creating a request by a client looks like this:



 [Back to list](#)

Title:

Group: **Category:** **Product:**

Attached files:

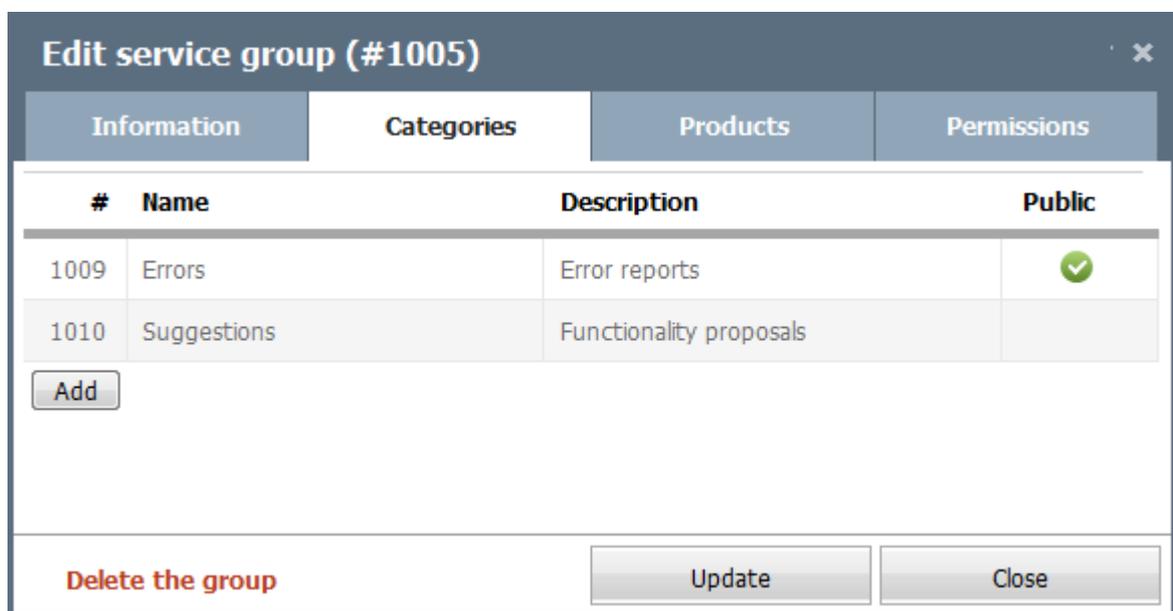
1.

- **Availability** - choose who can access this group. If "Internal" is selected, the group will be available

only to users inside the system. Selecting the "Public" option will enable the work of users from external website. That will cause another section to be added to the four default ones (depending on request status, the group has "Open", "Suspended", "Rejected" and "Closed" requests); the "Incoming" section will appear in the group, showing all requests from external sources;

- **Displayed Name** - this is an additional field that appears if the "Public" option is selected. This option chooses how the names of employees responsible for the requests are shown to the external website users. Choose one of three options: showing the full name of the employee ("Full Name"), just the first name ("First Name") or just showing the word "Manager" instead of a name ("Hidden" option);
- **Status** - If necessary, the group can be disabled by pressing the "Enabled" button, the button will become grey. In the disabled group one cannot create requests, and it isn't visible to the website or TeamWox users.

Message Categories

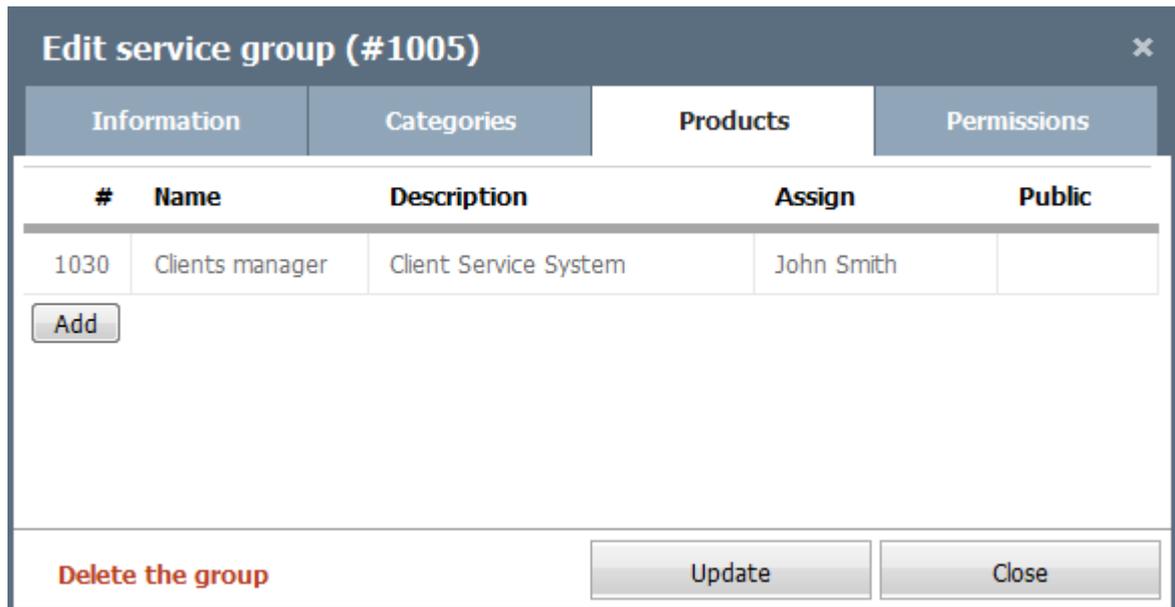


#	Name	Description	Public
1009	Errors	Error reports	<input checked="" type="checkbox"/>
1010	Suggestions	Functionality proposals	<input type="checkbox"/>

Buttons: Add, Delete the group, Update, Close

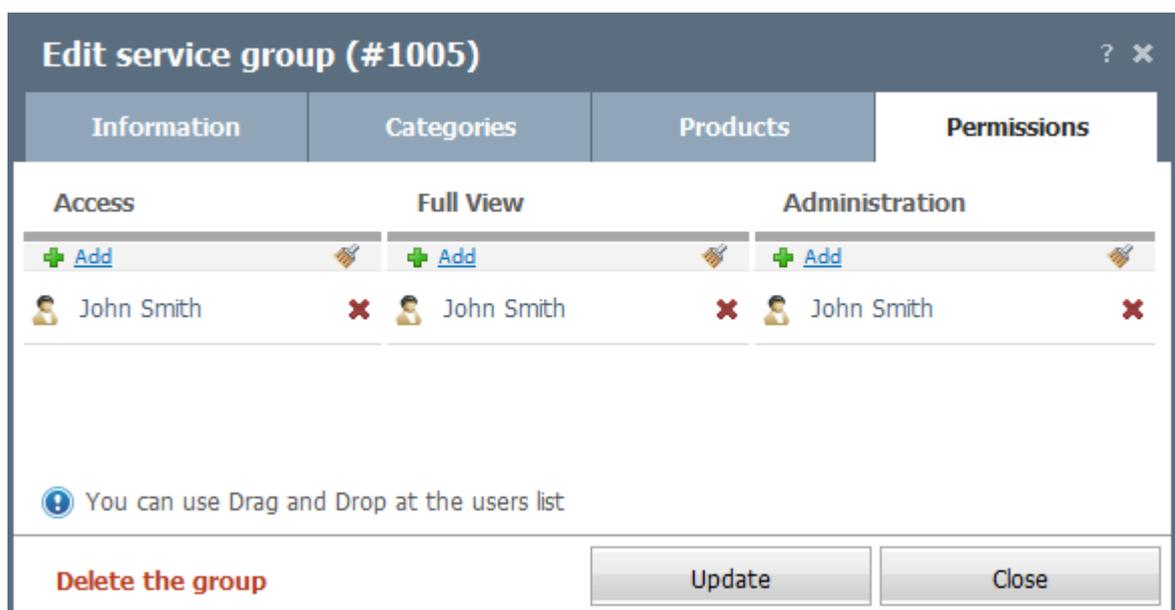
In the next tab create categories (for example: "Errors," "Suggestions"), to which requests in the group will be subdivided. Web site visitor will choose the category when creating a request. To create a category, press "Add". This will create a new line, where you need to indicate the name and description of a category. If you tick the "Public" field, the category will be available for visitors of the web site. You can start editing fields by double-clicking on them. The category can be deleted by pressing the appropriate pop-up button.

Served Products



In the "Products" tab add the names of products that will be served by this group. The web site visitor will need to make an appropriate choice to create a request. The best list of products - not more than three. If the list of products is large, it is recommended to group them by combining with more common names (for example, food, attendant, household goods). To create a product, click "Add". This will create a new line. Specify there its name and description. In the "Assign" field, specify the responsible user or group. If a request comes, it will automatically be assigned to these responsible people. If you tick the "Public" field, the product will be available for visitors of the web site. You can start editing fields by double-clicking on them. The product can be deleted by pressing the appropriate pop-up button.

Permissions



In the "Permissions" tab, configure the rights for service groups. Appointment and removal of all users/groups from the list of responsible employees can be made with the help of the "Add" and "Delete All" buttons. To delete a specific user/group, press the "Delete" button to the right of his/her/its

name. The rights are divided into the following categories:

- **Access** - users/groups can see the group and create requests in it. They will have access only to their own requests or to personally assigned ones. For example, employees with the "Access" right will not be able to see the request received from web site visitors or other company employees;
- **Full View** - this right allows to read and comment all requests in a group from company employees and from web site visitors;
- **Administration** - the right allows to edit group settings. If administrators have the "Full View" right, they can add or delete any comments in the requests and the requests themselves. If a user has only the right of administrating, he/she can not read or delete requests in the group. To do it, one must also have the "Full View" right.

After all the parameters of service groups are set up, press "Add" to create it in TeamWox. The same way create all company service groups in the "Service Desk" module. If you want to change the group settings, click the "Edit" button to the right of its name in the navigation of the "Service Desk" module. The windows of creating and editing of service groups are similar with each other. When editing a group on each tab appears an additional "Delete this group" button, with which you can do the appropriate operation.

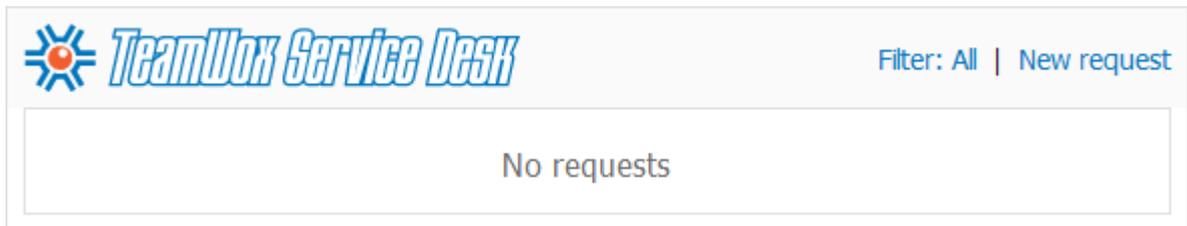
The "Service Desk" module comes along with a public component to integrate it to a website. This enables web site visitors to communicate with company employees in solving problems through requests. All requests will automatically arrive into the TeamWox system to responsible users. At the same time, a web site visitor will see the progress of problem solving and comments of responsible employees. These discussions are saved in the history of contact relations in TeamWox.

Integration of the module with the web site is done with the help of the css styles file and java-script that have to be called from a HTML page. For making the public component of "Service desk" work, one needs to download two files:

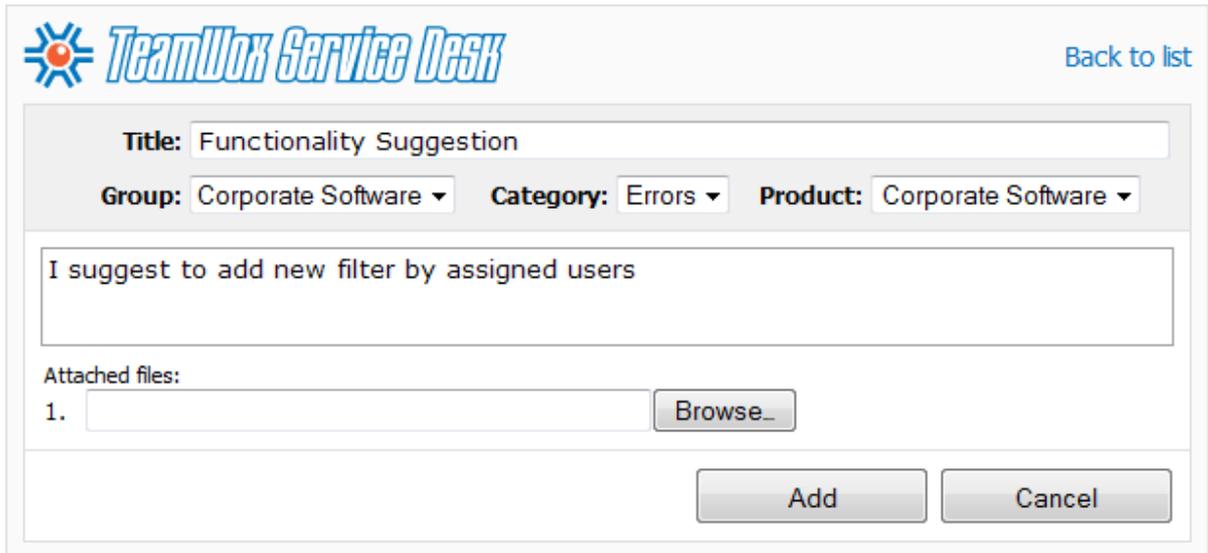
- https://team.your_client_teamwox_domain.ru/public/servicedesk/style.css;
- https://team.your_client_teamwox_domain.ru/public/servicedesk/script.js.

Instead of "your_client_teamwox_domain" you should specify the server address of the TeamWox system that you are configuring. In the other words, these files already come along with your system, and they have to be downloaded from a client's TeamWox server.

After downloading, the files must be placed on the web site of the company, to which a public part of the "Service Desk" module will be integrated. In addition, you must create a special page with the service desk code, or put a part of this code into an already existing page. Creating a new page, you must also give a link to it from other, public, sections of the site. Otherwise, the visitors simply won't find this service and won't use it. If everything was done correctly, the visitors will see the following window:



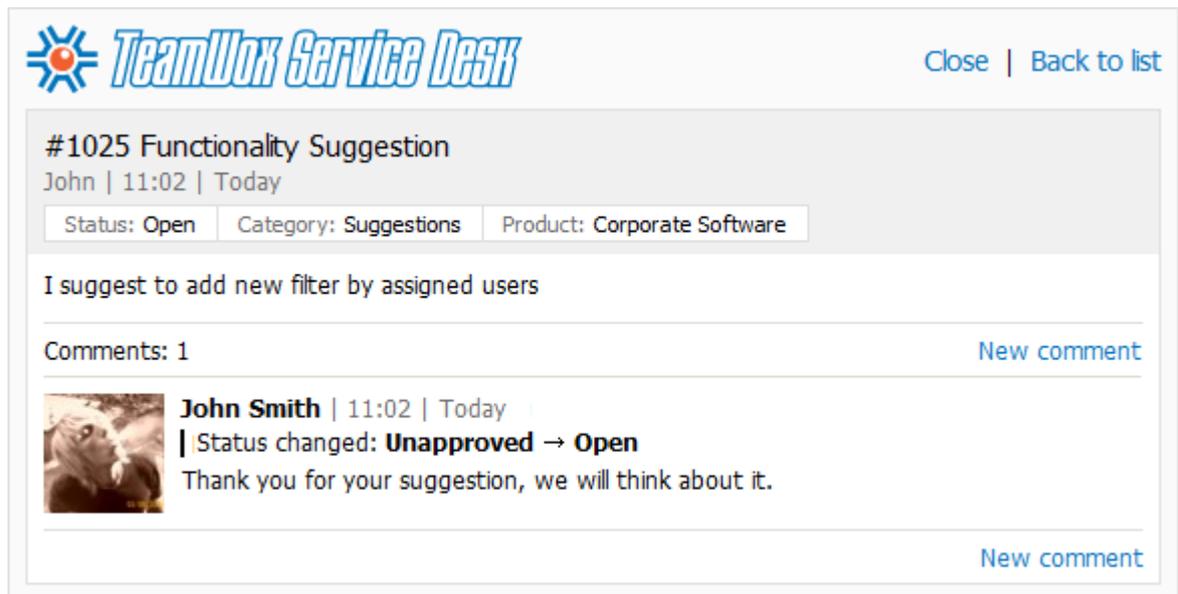
In this window, a user can see a list of applications formed by him/her. The Quick Command panel of the window contains the following buttons: Filter (you can filter the the list of requests by their status: "All", "Open" or "Closed") and "New request" (it can help to create a new request). Clicking on this button opens the following window:



The screenshot shows the 'TeamWox Service Desk' interface for creating a new request. At the top left is the logo, and at the top right is a 'Back to list' link. The form contains the following fields:

- Title:** A text input field containing 'Functionality Suggestion'.
- Group:** A dropdown menu set to 'Corporate Software'.
- Category:** A dropdown menu set to 'Errors'.
- Product:** A dropdown menu set to 'Corporate Software'.
- Description:** A large text area containing the text 'I suggest to add new filter by assigned users'.
- Attached files:** A section with a list of files. The first item is '1.' followed by an empty input field and a 'Browse...' button.
- Buttons:** At the bottom right, there are two buttons: 'Add' and 'Cancel'.

The lower part of the window was intended for creating the text of a request. Also, using the "Browse" button visitors can attach any file to the request. After clicking the "Add" button, the request will be sent to the responsible employee, to the "Service desk" module of TeamWox. The web site visitors will also be able to monitor the answers and post their comments. To do it, he/she only needs to choose a request from the list. This will open a correspondence with the company employee:



The screenshot shows the 'TeamWox Service Desk' interface for viewing a specific request. At the top left is the logo, and at the top right are 'Close' and 'Back to list' links. The request details are as follows:

- Title:** '#1025 Functionality Suggestion'.
- Author:** 'John | 11:02 | Today'.
- Status:** 'Open'.
- Category:** 'Suggestions'.
- Product:** 'Corporate Software'.
- Description:** 'I suggest to add new filter by assigned users'.
- Comments:** A section titled 'Comments: 1' with a 'New comment' link.
- Comment:** A comment by 'John Smith | 11:02 | Today' with the text 'Thank you for your suggestion, we will think about it.' and a 'New comment' link.

Here visitors can have a dialogue with the responsible employee - create new comments using a button of the same name. If necessary, one can close the request or return to the list of requests using the "Close" and "To the list" buttons in the upper part of the window.

Currently, the Service desk public part works with two languages: Russian and English. However, no additional configurations have to be produced. Languages are automatically chosen according to the language of a user's operating system.

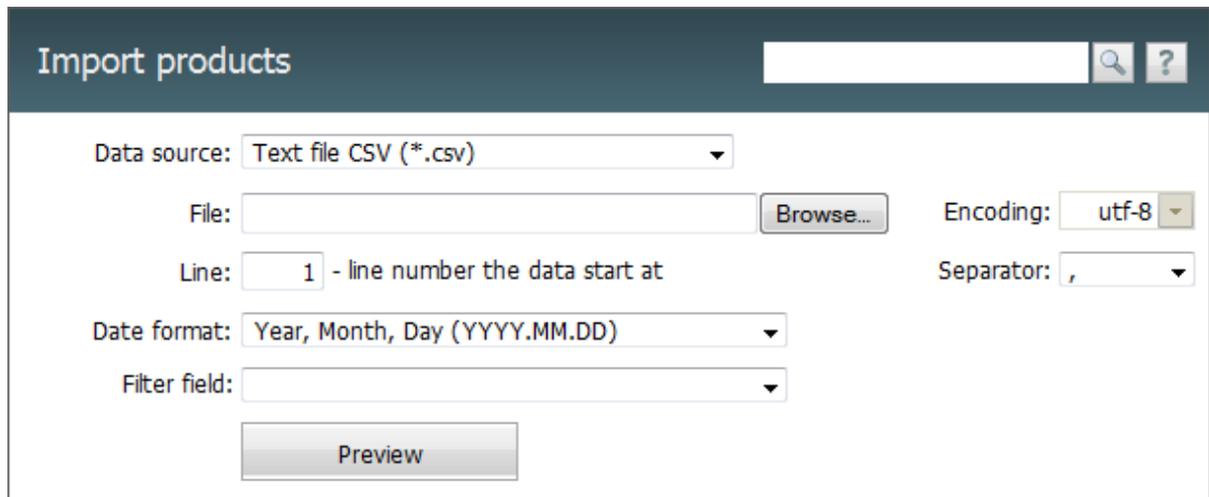
Attention: You can read the detailed instruction for integration of the "Service Desk" module to web site in the system help (press "?" in the right corner of the Quick Command panel of TeamWox) and on official TeamWox web site at: <http://www.teamwox.com/en/teamwox/help/servicedesk/public/index>.

The "Products" module is used for managing products and services produced and consumed by your company. It is a common reference book, which is connected to the "Accounting" and "Organizations" modules. To configure the "Products" module, add information about products produced and consumed by the company. You can import data or add manually necessary information about the products to the reference book. In the future, TeamWox users will be able to edit and add products to the reference book.

Before adding products, make up a list of produced and consumed products. Ask the marketing and supply departments about products classification used in the company with the division into groups (for example, water and juices, bakery products, ladies shoes, etc.) and categories (for example, food, associated goods, household goods, furniture). Gather information for each product/service that you need to enter to the TeamWox system.

Import of Products from a Text CSV File

You can import products data to the system from a CSV file. To do it, press "Import" on the Quick Command panel of the "Products" module.



Set here the following parameters:

- **Data source** - in this field you should specify the format of a file that you're going to import. Only the *.CSV files are supported at the moment. Other file formats will be added in the future;
- **File** - by pressing the "Browse" button, in this field you choose a .CSV file that contains the organization data to be imported;
- **Encoding** - the selection of encoding of the imported file. If the encoding is selected correctly, after pressing the "Preview" button the information will be displayed correctly. Otherwise you will have to select a different encoding and check again by pressing "Preview";
- **Line** - the number of a line the organizations' data start with in the imported file. It is possible that the file would start with several lines listing the name and description of the file, then a line with column names, and then lines with data to be imported. In this case, you should input the number of the line that has column names. They will be shown when viewing data from the file;
- **Separator** - separator that divides different data by organizations in the file (comma, dot or tabulation character);
- **Date format** - the selection of date format in the imported file. The options are: "Year, Month, Day

(YYYY.MM.DD)", "Day, Month, Year (DD.MM.YYYY)", "Month, Day, Year (MM.DD.YYYY)".

After entering all necessary data, press the "Preview" button. Then the information from the imported file will be displayed in the lower part of the working area. If the data recognition was done incorrectly, you should change the parameters and repeat the operation.

Match fields and press 'Done'

	Name	Status	Category	-- Not selected --
	Name	Status	Category	Price
2	Product 1	On offer	Service	100
3	Product 2	On offer	Software	1500
4	Product 3	On offer	Software	700
			<input type="button" value="Done"/>	<input type="button" value="Cancel"/>

After verifying of the data correctness, associate the columns of the imported file with the fields in TeamWox. You can select the field above each column read from a file. Not associated columns (above which "Not selected" is indicated) won't be imported.

It's necessary to fill in the "Name" field when you import products. By this field the added product is compared with the ones that already exist in TeamWox system. It allows to renew the information about products not duplicating them. After verification and correlation of the fields are done, click the "Done" button, and the new products will be added.

Adding Products Manually

You can add products to the TeamWox system manually. To do it, press the "New product" button on the Quick Command panel of the "Product" module. In the appeared window, type information about a product, dividing it into four sections:

Products

← Furniture
Back to list | New product

- All
- Deleted
- + New filter

Main

Name: Service:

Status: Unit:

Category: Group:

Identification

Code: Series:

CCD: Barcode:

Prices

Price: Markup: 87.50 %

Wholesale price:

Dealer price: 37.50 %

Input price: Currency:

Additional

Obsolete: (Not shown in the dropdown list of products)

Periodicity: VAT, %:

Web:

Comment:

Linked:

Main

- **Name** - specify the name of the product. It has to be unique, a permanent link to this product is formed by it. With the help of the link this product will be connected with other modules in TeamWox ("Accounts", "Organizations", etc.);
- **Service** - if this is a service and not a good, this field must be checked. This is an informational field and is displayed in the products list. For example, you can create a filter by this field choosing only company services;
- **Status** - indicate product's status (for example, in development, in production, available, ordered, in stock, written off, etc.);
- **Unit** - indicate a product unit (unit, set, kilogram, etc.);
- **Category** - choose category of this product (for example, food, attendant, household goods, furniture, etc.);

94

- **Group** - specify group of this product (for example, water and juices, bakery products, ladies shoes, etc.).

The wide possibilities of dividing the products into categories, groups, etc. allows creating their accurate and convenient classification. Values specified in the "Status", "Units", "Category" and "Group" fields are memorized by the system and can be available from the pop-up lists for further product creation.

Identification

This block contains four fields that identify goods. In these fields, you can enter any symbols, but it is recommended to add only letters or numbers (no spaces, dashes, quotation marks). Decide what formats of the fields you will use and stick to them when you add products. Perhaps the fields should be filled according to the coding and classification of products, that is already used in company. This allows to search for products by codes, which is comfortable. Formats of "CCD" and "Bar Code" fields depend on the country of the manufacturer/distributor.

- **Code and Series** - code and number of added product that is used in the company. They can be used in creating of accounts;
- **CCD** - number of cargo custom declaration. CCD is one of the main documents, which is required for moving goods across the custom border of the country;
- **Barcode** - barcode of the product. The most common bar codes are 13 bits code EAN-13 (European Article Numbering) and fully compatible with it 13-bits code UPC, used in the USA and Canada.

Prices

There are four different prices of goods in the TeamWox products reference book.

- **Price** - retail price of the product. When creating an invoice in the "Accounting" module this price is used by default;
- **Wholesale price and Dealer price** - these prices depend on the volume and status of the buyer. These fields can be linked to the volume of purchased products or the status of the organization to change prices for products when invoicing;
- **Input price** - product cost or purchasing price of the goods. Calculation of price markup for the product, which can be done in the field of the same name, is based on it;
- **Currency** - monetary units in which payments for this product are made. For example, EUR - euros, USD - USA dollars, and so on. The same as in the case of the product categories described above, the system remembers monetary units and they will be available from the drop down list during the subsequent creation of products;
- **Price markup** - the percentage difference between retail, dealer and wholesale prices and the cost (input price) of the product. The contents of this field is calculated automatically.

Additional

- **Obsolete** - tick this box if the company stopped to produce this product/no longer provides this service. In this case the product will not be displayed in the drop down lists. For example, when choosing the product while creating an account in the "Accounts" module or when choosing a related product below;
- **Periodicity** - specify the frequency of invoicing for paying for the product/service. You can choose

from the drop down list. Available options are: "As flat payment", "Daily", "Weekly", "Monthly", "Quarterly" and "Annually". If the product or service does not require periodic payments, leave the field empty. Periodicity will be indicated [in the invoice when you add product to it](#);

- **VAT, %** - here indicate in per cents the value added tax (VAT) on this product;
- **Web** - if necessary, type the address of the product in the Internet. This link will appear in the list of products by clicking on which you can open the page with a description of the goods;
- **Comment** - here you can enter a comment to the product, for example, write the product description (indicate place of manufacturing of the product, specifications, appearance, purpose, market share) or list the information about main customers of added product. This field is informational and appears only in the "Products" module in the list of products or in the profile;
- **Linked** - in this field you can choose related products. This feature is convenient when the distribution of one product goes together with the other. For example, software and its technical support. When you put the main product to the account, a line with its associated product will be added automatically.

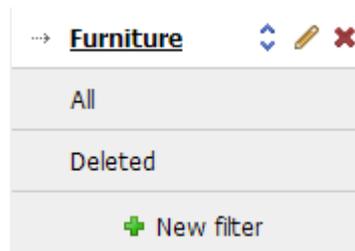
In order to save the information about the product, you should press the "Create" button located in the bottom part of the window. If you press the "Cancel" button, the information is not saved, and you are returned to the window of viewing the list of products. You can go to other products with the help of "Next" and "Previous" buttons.

Add information about the rest of produced and consumed products. To edit information about a product, go to viewing mode by clicking on its name in the list. Then select the "Edit" tab in its navigation. The working area of product editing is the same as of creating. To save your changes, click the "Update" button at the bottom of the page.

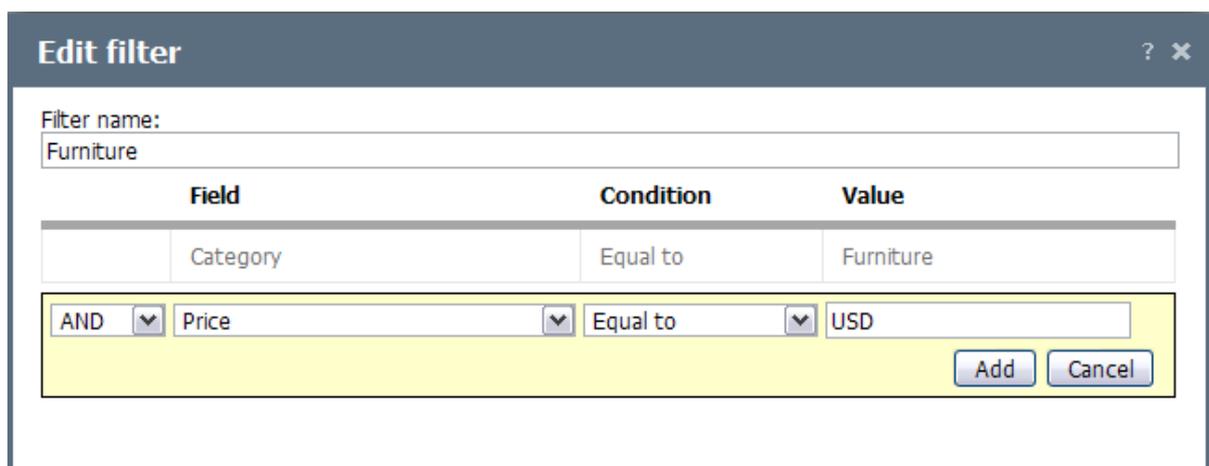
For easy navigation through the list of products in TeamWox, you need to configure filters. For example, you can configure filters by categories and product groups. Filters are located in the navigation of the "Products" module and are accessible for all users of the TeamWox system. Among them there are always system filters: "All" (here all products created in the system are shown) and "Deleted" (here all deleted from the list products are moved). System filters can't be edited.

Attention: If the product is deleted from the "Deleted" filter, it will be impossible to restore it.

Press "New filter" under the list of filters to create a new filter.



Then enter a new name and press the "Add a rule" button.



The image shows a dialog box titled 'Edit filter' with a close button in the top right corner. Inside the dialog, there is a text input field for 'Filter name:' containing the word 'Furniture'. Below this is a table with three columns: 'Field', 'Condition', and 'Value'. The first row of the table has 'Category' in the 'Field' column, 'Equal to' in the 'Condition' column, and 'Furniture' in the 'Value' column. Below the table is a highlighted yellow area containing a rule configuration. It starts with a dropdown menu set to 'AND', followed by a dropdown menu set to 'Price', another dropdown menu set to 'Equal to', and a text input field containing 'USD'. At the bottom right of this yellow area are two buttons: 'Add' and 'Cancel'.

In the "Filter Name" indicate the name of the created filter. It will be visible for every employee in the navigation panel of the "Products" module. When you click the "Add a rule" button, a block on a yellow background with four fields and two buttons appears:

- In the first field of the block, select the filter condition ("AND", "OR"). This field is taken into account when selecting several rules (conditions) for a single filter. For example, if you choose "AND" in the first condition and "OR" in the second, then you will get all results that satisfy the first rule, or the second;
- In the drop-down list of "Field", choose the parameter by which the choice in this filter is done. The list contains almost all the fields that are filled out when adding products to TeamWox;
- In the "Condition" field select the filtration condition. Possible variants, depending on the chosen field, are: "Empty," "Not empty", "Equal to", "Not equal to", "Starting with", "Containing";
- If you select one of the last four conditions, enter the sought-for word in the "value" field. For example, to create a rule for the necessary product category, in the "Field" column choose "Category", in the "Conditions" column specify the "Equal to", and in the "Value" field type the name of the necessary category. After creating, this rule will filter the list of products by the given

category.

To add rules to the filter, press "Add" at the bottom of the window. After adding the rules to the filter, an appropriate line appears in the list of conditions. You can create several rules for one filter.

After adding all the rules, press the "Create" button in a window of filter creation. The filter appears in the navigation panel of the "Products" module and will be accessible for all users. The same way create all the filters that are necessary for easy navigation through products created in the system.

To edit the list of created filters use pop up buttons:  - move filters up/down;  - edit the filter;  - delete the filter.

The "Accounting" module is used for keeping information about financial operations of a company. Financial operations are divided into books denoting different projects or operations. Payments for contracts with different organizations are contained in books.

Accounting

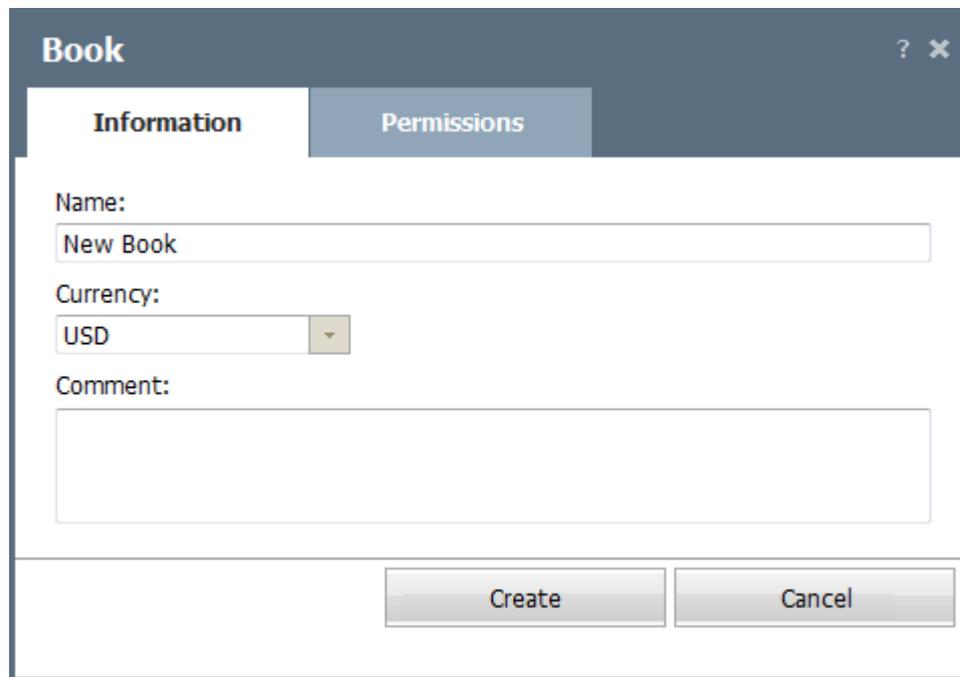
<ul style="list-style-type: none"> → Open books Closed books Currency Rates Invoice templates Statement templates  Settings 	<div style="background-color: #4a7ebb; color: white; padding: 5px;"> New book Reports <div style="float: right; text-align: right;"> <input style="width: 100px;" type="text"/>    </div> </div> <div style="background-color: #333; color: white; padding: 5px; margin-top: 5px;"> ABC Company </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #eee;"> <th style="width: 5%;"></th> <th style="width: 45%;">Name</th> <th style="width: 15%;">Income</th> <th style="width: 15%;">Expenditure</th> <th style="width: 10%;">Balance</th> <th style="width: 10%;">Currency</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td>Corporate Software Sale</td> <td style="text-align: right;">9 000.00</td> <td style="text-align: right;">10 000.00</td> <td style="text-align: right;">-1 000.00</td> <td style="text-align: center;">USD</td> </tr> <tr> <td style="text-align: center;"></td> <td>Internet Provider</td> <td></td> <td></td> <td></td> <td style="text-align: center;">USD</td> </tr> <tr> <td style="text-align: center;"></td> <td>Office Rent</td> <td></td> <td></td> <td></td> <td style="text-align: center;">USD</td> </tr> </tbody> </table> <div style="text-align: right; margin-top: 5px;"> 1 ... 3 → 3 </div>		Name	Income	Expenditure	Balance	Currency		Corporate Software Sale	9 000.00	10 000.00	-1 000.00	USD		Internet Provider				USD		Office Rent				USD
	Name	Income	Expenditure	Balance	Currency																				
	Corporate Software Sale	9 000.00	10 000.00	-1 000.00	USD																				
	Internet Provider				USD																				
	Office Rent				USD																				

Before configuring the "Accounts" module, analyze the contractual relationships with contractors.

1. You need to study the types of transactions used by the company. Group them by books and identify employees who will be responsible for their viewing, editing and administrating. This will allow to create the right books in TeamWox and to distribute company's invoices among them;
2. Mark out the existing contracts with clients, suppliers and partners of the company. They need to be added to the system for further tracking of contractual obligations, billing and accounting payments for them;
3. Check if there are any active contracts in the TeamWox system and link them to the contractors. To do it, enter the "Organizations" module, select the appropriate contractor with whom the company has a contract. In the profile of the organization in the "Documents" tab this contract should be displayed. If necessary, add the contract to the "Documents" module of TeamWox system and attach it to the organization as it is described in "[Linking Documents to Organizations](#)". It's necessary to [set up the invoices](#) and [payments](#) for them according to these contracts.

After analyzing, configure the "Accounting" module. You need to set the account books and access rights to them, add invoices and payments, set up users templates for printing bills. Also in the settings you need to indicate an e-mail, from which the invoices will be sent to contractors' accountants.

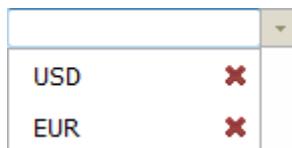
In the "Accounting" module books are designed to divide the information about transactions between different projects or areas. According to the analysis of contractual relations, create all necessary books for keeping financial operations of the company in TeamWox. To begin creating a book, click the "New book" button on the Quick Commands panel. The following window will be opened:



Information

Fill in here the following fields:

- **Name** - enter the name of the book that you are going to create. It will appear in the list of books of the "Accounting" module and include certain company invoices and payments. For example, you can divide the books by the structure of the company (head office, branches);
- **Currency** - specify the currency in which payments will be done in the created book. This field is free, you can type there any definition. All previously entered currency codes are stored in the system and later can be selected from the list.



If necessary, you can delete any currency from the list using the "Delete" button which is to the right to each of them. Removal of a currency from the list does not affect the other books with the same currency. Currency can only be removed from the drop down list.

- **Comment** - here add a short text description for the book. This is an informational field, it is only available when viewing information about the book, opened by the pop-up "Editing" button.

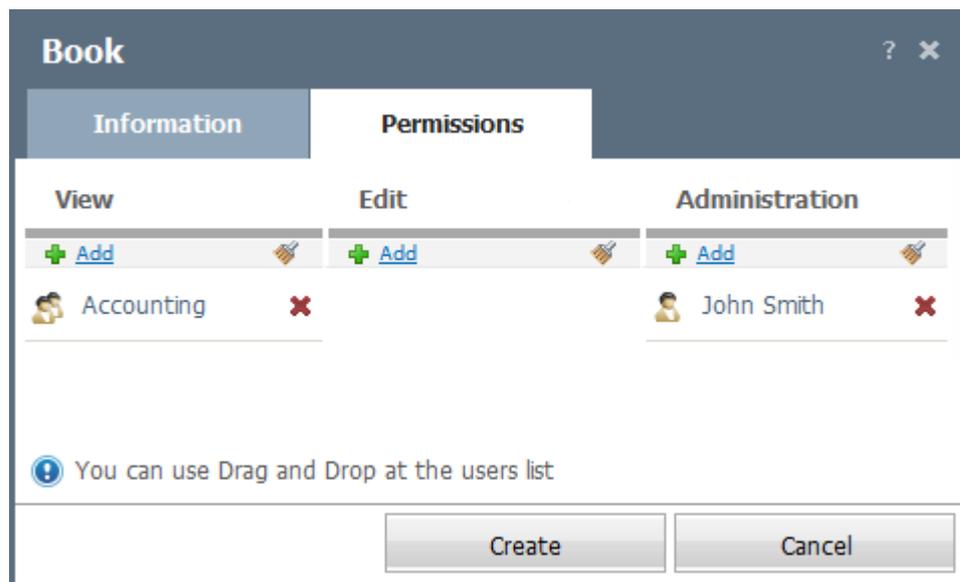
Rights

Set here access rights to the book for different users and groups:

- **View** - viewing information in this book. For example, you can allow viewing the book for the

company auditing service;

- **Edit** - viewing and editing information in this book. Assign employees who will create invoices and take into account payments on this book. For example, if a book is created to work with clients from regional office, you must give the rights to employees of commercial and financial departments of this office. They will be able to invoice customers and track payments for them;
- **Administration** - viewing and editing of information in a book, as well as the ability to edit the rights to the book and to remove it. For example, you can assign the rights to administrate the books only to the head office. Then the new employee of a regional office will have to send a request to the head office (to the Administrator of the book) in order to be able to work with invoices in this book.



Only the book creator (you) has the access access rights for the book by default. To assign any rights for users/groups, press "Add". To exclude the rights, click the "Delete" button to the right of the user name or "Delete All".

After filling in all the information, click the "Create" button. If you click "Cancel", the book won't be created, and the working area of the "Accounting" tab will be opened. To start editing the book, press the pop-up "Edit" button. The editing window is similar to creating a new book window.

You need to add company invoices to TeamWox according to the current contracts. For one current contract create one invoice taking into account the contract terms (price, timing, frequency, etc.). To do it, press the "New Invoice" button on the Quick Command panel in the book created earlier in the "Accounting" module. The following window will appear:

Accounting

All documents

→ Orders

Payments

To list
| New order
| New payment

⌵
🔍
?

Current book: Product One
Edit | Preview

Date: 📅

Supplier: ▼

Recipient: ▼

Number: Next number

Manager: ▼

Comment:

Include VAT:

Passed:

	Date	Product	Quantity	Unit	VAT, %	Price	Total
📦	2010.07.27	Armchair "Antique" leather white	1.00		18.00	15 000.00	15 000.00
📦	2010.07.27	assembly	1.00		18.00	500.00	500.00
Add record						Sum total:	15 500.00
						VAT total:	2 364.41

The working area of accounting is divided into two parts. The upper part contains the basic information about the invoice, the lower part shows data about products and services, for which this invoice was created.

Main Information

- **Date** - date of the invoice. It can be set manually or with the help of the interactive calendar, which opens by clicking the "Calendar" button;
- **Supplier** - organization that provides a product/service. If you click this field, the list of [organizations added to the system](#) will be opened. Choose the supplier by pressing its name;
- **Recipient** - organization, which is supplied with goods/services. The choice is available also from the list that opens by clicking this field;
- **Number** - assigned account number. Next number in the order for this pair of "supplier-recipient" may be assigned automatically if you click "Next number";
- **Manager** - select a person responsible for work with the invoice. This company employee will solve all questions relating to the payment for this invoice (possibly the subsequent delivery of goods/

services) by contractor. By default, this is the employee, who adds the invoice;

- **Comment** - type a short text description to the created invoice. You can also specify contact people, who are responsible for this invoice from contractor's side, estimated date of payment for the account, etc. This informational field is available only when viewing the details of the invoice. The created invoice can be issued to the contract signed with the contractor. In this case, in the "Comment" field enter the number and date of the contract, for which this invoice is created.
- **Take VAT into account** - if you tick this field, the sum of the account will include VAT (value added tax), calculated for each product individually. In the "Products and services data" block, an additional column "VAT, %" will appear;
- **Passed** - if you switch this option on, the account will be considered as passed. Not passed invoices are not involved in the formation of reports. To be able to pass invoices, a user must possess an appropriate right, which may be assigned by the TeamWox system administrator.

Information about Products and Services

The products/services for which the invoice is created are added in this block. Every product/service meets one record (line), which is added by using a button of the same name. You must enter the following data to each:

- **Date** - date of good delivery or service providing. It can be set manually or with the help of an interactive calendar that opens when you press the button of the same name;
- **Product** - name of the product/service. By clicking this field you open the [earlier added product list](#). Next time the list will show only those products that were already chosen in this book by this user. To select other products, use a filter at the top of the list;
- **Comment** - here you can leave a text comment about the product, for example, specify the exact location (room storage number), where to/where from the specified product should be delivered;
- **Periodicity** - it's necessary to indicate the periodicity of invoicing if delivery of goods/services is regular. The periodicity for each good you have already [indicated when you added a product to the reference book](#). This number will be entered in this field by default. But you can choose another one from the drop-down list. The following options are available: "Daily", "Weekly", "Monthly", "Quarterly" and "Annually";
- **End** - indicate the end date of delivery in this field if the delivery of goods/services is regular;
- **Amount** - number of periods. In case of periodic delivery this amount is calculated automatically: when you specify the end date, the amount is counted till this date, if it is missed - till the current date. If there is no periodicity, the quantity of provided goods/services is indicated manually;
- **Unit** - enter the unit of goods/services (units, kilograms, tons, etc.);
- **VAT, %** - VAT in per cents from the amount. This tax will be included into the invoice, if you tick "Take VAT into account" option. VAT amount will be shown in the additional "including VAT" field. VAT amount that was indicated earlier when you [added products](#) is put to this field by default. If necessary, change the number in this field manually;
- **Price** - the retail price for the unit of product that was indicated in product's reference book. This field also can be changed manually;
- **Sum** - in this field the result of multiplying of product's/service's price by the amount is shown.

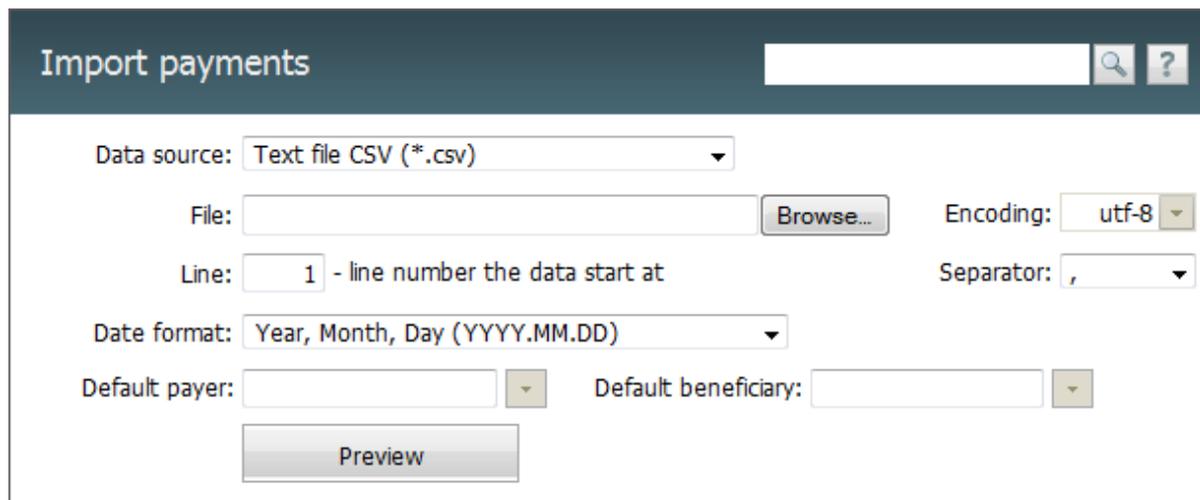
To save all changes and create an invoice, press the "Create" button. To cancel the invoice creation

and return to the list of invoices, press "Cancel" or "Back to list". Add all invoices for the current contract. While filling in the "Supplier", "Recipient" fields, invoices will be automatically linked to organizations. The invoice editing is available in the list of appropriate books.

If payments for the current contracts have been already passed, add them too. This will allow to relate the invoices and payments and monitor contractual relationships with each contractor (via "Accounting" or "Organizations" modules).

Adding Payments

If there is a possibility, import payments to the system from a CSV-file. To do it, open an appropriate book in the "Payments" tab. Press "Import" on the Quick Command panel. The following window will be opened:



Specify here the following parameters:

- **Data source** - in this field you should specify the format of a file that you're going to import. Only *.CSV files are supported at the moment. Other file formats will be added in the future;
- **File** - by pressing the "Browse" button, choose a .CSV file that contains the organization data to be imported ;
- **Encoding** - the selection of encoding of the imported file. If the encoding is selected correctly, after pressing the "Preview" button the information will be displayed correctly. Otherwise you will have to select a different encoding and check again by pressing "Preview";
- **Line** - the number of a line the organizations' data start with in the imported file. It is possible that the file would start with several lines listing the name and description of the file, then a line with column names, and then lines with data to be imported. In this case, you should input the number of the line that has column names. They will be shown when viewing data from the file;
- **Separator** - separator that divides different data by organizations in the file (comma, dot or tabulation character);
- **Date format** - the selection of date format in the imported file. The options are: "Year, Month, Day (YYYY.MM.DD)", "Day, Month, Year (DD.MM.YYYY)", "Month, Day, Year (MM.DD.YYYY)";
- **Default payer** - select from the pop up list of organizations a payer, who pays the bill. If for some payment in a file a payer is not specified, then a payer is automatically selected by default;
- **Default beneficiary** - select a beneficiary from the pop up list of organizations, which issued the invoice that is paid. If for some payment in the file a beneficiary is not specified, then a beneficiary is automatically selected by default.

Attention: When you import payments, specify the "Beneficiary" (or "Default beneficiary") and "Payer" (or "Default payer") fields. The added payment will be linked to the beneficiary and the payer by these fields.

After entering all the necessary data, press the "Preview" button. Then the information from the imported file will be displayed in the lower part of the working area. If the data recognition was done incorrectly, you should change the parameters and repeat the operation.

Match fields and press 'Done'

	Number	Amount	Beneficiary	Payer
	Number	Amount	Beneficiary	-- Not selected --
2	1	1000	ABC Company	BCD. Inc
3	2	100	ABC Company	BCD. Inc
			Done	Cancel

After verifying of the data correctness, associate the columns of the imported file with the fields in the TeamWox system. You can select the field above each column read from a file. Not associated columns (above which "Not selected" is indicated) won't be imported.

After verification and association of the fields are done, click the "Done" button, and the new payments will be added. Import all payments for active contracts and accounts of the TeamWox system customer.

Adding Payments Manually

You can add payments to TeamWox manually. This can be done by two ways. The first method is possible if the payment is made for the invoice, which was previously created in the system. In this case, open the invoice viewing window and press the "Pay the invoice" button on the Quick Command panel. A payment adding dialog will appear, where the invoice details will be indicated automatically according to the paid invoice. To make this payment, press the "Create" button. Another way - after choosing a book, press the "New payment" button on the Quick Command panel. The following window will be opened:

Accounting

All documents

Orders

→ Payments

To list

⌵
🔍
?

Current book: Product One

Date: 📅

Payer: ▼

Beneficiary: ▼

Number: Next number

Amount:

Passed:

Invoice: ▼

Payment method:

Comment:

Manager: ▼

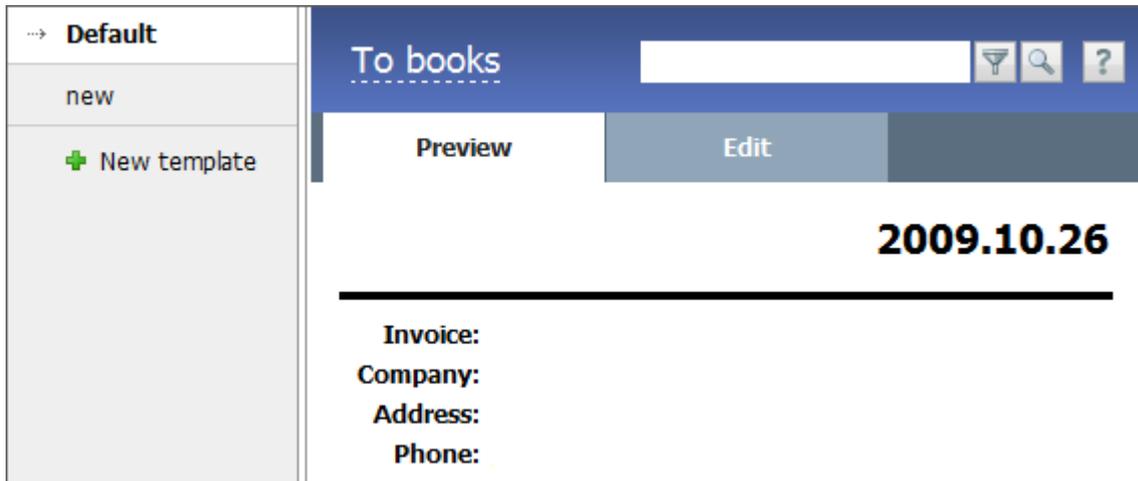
Here fill in the parameters of the payment:

- **Date** - enter the date of the payment. It can be set manually or with the help of an interactive calendar, which opens by pressing the button of the same name;
- **Payer** - organization that pays the invoice. If you press this field, the list of [organizations added to the system](#) will appear. Choose a supplier by pressing its name;
- **Beneficiary** - select an organization that receives the payment. The choice also can be made from the list that opens by clicking this field;
- **Number** - specify the number of the payment that is added. Next number in the order for this pair of "supplier-recipient" may be assigned automatically if you click an appropriate button;
- **Amount** - indicate the amount of the payment;
- **Passed** - If you switch this option on, the account will be considered as passed. Not passed payments are not involved in the formation of reports. To be able to pass payments, a user must possess an appropriate right, which may be assigned by the TeamWox system administrator;
- **Invoice** - select the invoice number from the drop down list, for which the payment will be done;
- **Payment method** - specify way of payment, which was used for paying (cash, bank transfer). This is an informational field, it will be displayed only in the list of all payments and when viewing the details of the payment;

- **Comment** - here you can enter a text comment for the payment. For example, you can specify the name of the bank, through which this payment was made. This is an informational field, it will be displayed only in the list of all the payments and when viewing the details of the payment;
- **Manager** - specify the user responsible for this payment. By default, this field indicates the user who adds the payment. By clicking this field, you will be able to appoint another manager.

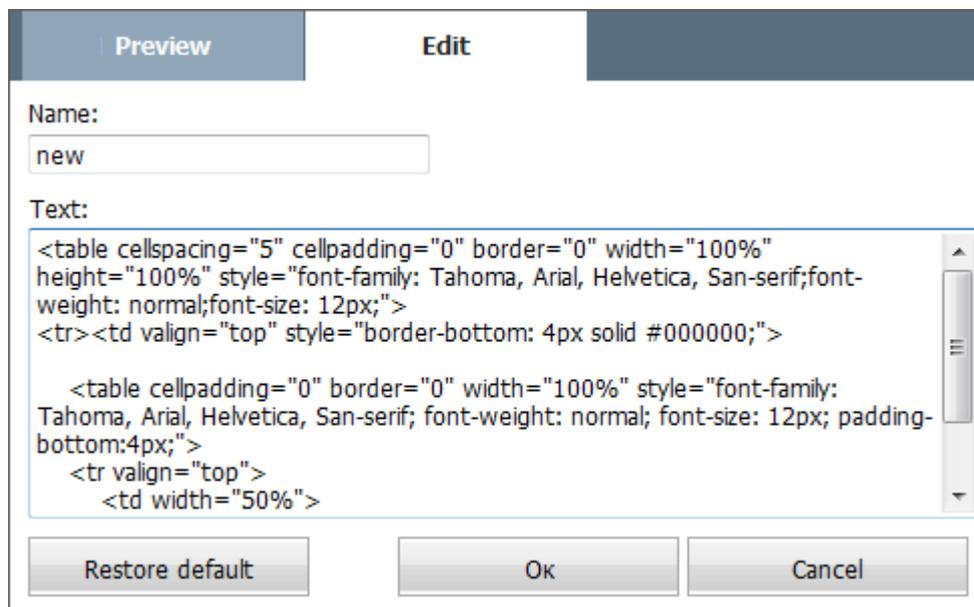
To add a payment, click "Create". To cancel a payment and return to the list of documents, click "Cancel" or "Back to list". Add all payments for all current company contracts and accounts. To edit the payment you need to enter it from the list of documents in the "Accounting" module. After entering all invoices and payments for current contracts to the TeamWox system, the company managers can trace financial operations with the contractors of the company.

Create custom templates for invoice printing in the "Accounting" module. To begin the work with templates, enter "Accounting -> Templates".



A list of available templates is shown in the navigation. The "Default" template is always there, it can't be deleted. There are two tabs in the working area: "Preview" and "Edit". With their help, you can see the appearance of the template or create/edit it in the HTML format.

To create an account template, press "New Template" in the navigation panel. You'll enter the "Edit" tab, and as a basis for the new template "Default" will be taken. In the upper field "Name" enter the name of the new template.



In the "Text" field edit the html code of the template. The template is created using Hypertext Markup Language (HTML), as well as various macros that allow you to get the names and definitions of organizations' fields, invoices and books. Use the "Restore default" button to return the template to the original form, stored in the system by default.

To save the template in the system, press "OK". The template will appear in the list of templates in the navigation. To undo all changes, press "Cancel". To view or edit the template you need to click its name with the left button of the mouse. To delete a template, press the pop-up "Delete" button.

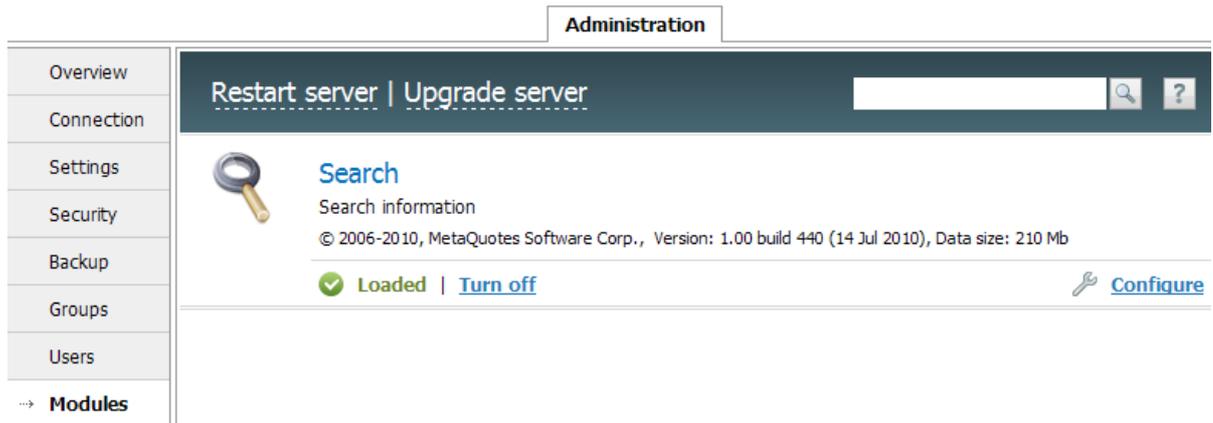
Attention: Additional information about creating invoice templates and detailed descriptions of all macros, definitions and names of the fields in the "Accounting" module are given in the TeamWox help files. To enter the system, press "?" in the right corner of the Quick Command panel of the "Accounting" module or use the following link: <http://www.teamwox.com/en/teamwox/help/accounting/templates/index>.

This section describes the advanced settings of TeamWox. These configurations are recommended if the system will be actively used by employees in the future. This will optimize the TeamWox server, increase its productivity, improve security and reliability of the system. The section covers the additional search system configuration and backup data copying to another hard disk.

The search system in TeamWox is already configured by default. But with the active work of users the amount of the indexed information will increase significantly. This will require additional server resources that can lead to a decrease in the system efficiency. Therefore it's recommended to make additional configuration of the search system options that consists of two phases:

Configuration of the "Search" Module

To configure the "Search" module, enter "Administration -> Modules". Press the "Configure" button to the right of "Search".



In the working area, you'll see the list of parameters for configuration. With their help it's possible to allow server to use maximum of memory for searching or prohibit the indexing of some system modules.

Administration

Overview	Back to list																								
Connection	<input style="width: 100%; height: 20px;" type="text"/> <input style="float: right; width: 20px; height: 20px; border: none; background: none; cursor: pointer;" type="button" value="🔍"/> <input style="float: right; width: 20px; height: 20px; border: none; background: none; cursor: pointer;" type="button" value="❓"/>																								
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Security	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%; text-align: left;">Parameter</th> <th style="width: 20%; text-align: left;">Value</th> </tr> </thead> <tbody> <tr> <td>Maximum memory usage</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Tasks"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Documents"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "E-Mail"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Board"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Organizations"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Contacts"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Team"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Chat"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Products"</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Disable indexing module: "Service Desk"</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Parameter	Value	Maximum memory usage	<input type="checkbox"/>	Disable indexing module: "Tasks"	<input type="checkbox"/>	Disable indexing module: "Documents"	<input type="checkbox"/>	Disable indexing module: "E-Mail"	<input type="checkbox"/>	Disable indexing module: "Board"	<input type="checkbox"/>	Disable indexing module: "Organizations"	<input type="checkbox"/>	Disable indexing module: "Contacts"	<input type="checkbox"/>	Disable indexing module: "Team"	<input type="checkbox"/>	Disable indexing module: "Chat"	<input type="checkbox"/>	Disable indexing module: "Products"	<input type="checkbox"/>	Disable indexing module: "Service Desk"	<input type="checkbox"/>
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Statistics																									
	<input style="width: 100px; height: 25px; border: 1px solid gray;" type="button" value="Update"/> <input style="width: 100px; height: 25px; border: 1px solid gray; margin-left: 20px;" type="button" value="Cancel"/>																								

If you enable the option "Maximum Memory Usage", this will allow the system to use the maximum available memory on the server. This option is recommended to switch on only if the server is used exclusively for the TeamWox system and it does not have another server software (for example, MS SQL Server, Oracle RDBMS, etc.). Enabling this option is recommended if the server has 4 or more gigabytes of RAM.

With the help of the other fields you can prohibit indexing of the system modules by enabling appropriate options. In this case, information won't be added into the search index (mails or tasks or comments) from this module. Also, the data from this module will not participate in full reindexing (entering all information from the TeamWox system modules to the "Search" module).

Configuring the Storage of Search Indexes

By default, the search indexes in TeamWox are stored on the same disk where the system is. But with high user activity, the size of search indexes can grow significantly and will take resources from the system server, making it slower. Storage configuration is recommended when the size of search indexes is more than 8 GB (this information can be found in the "Administration -> Modules -> Search" module). It is recommended to store them on a separate physical hard drive (not RAID), which will

increase the scalability of the system.

To configure the storage of search indexes, prepare a new location to store search indexes (install a hard disk). Then do the following operations:

- stop the TeamWox server by running the following command in the command line: "updater.exe / stop";
- copy all files from the folder "[Configuration way TeamWox]\db\data\search" into a separate folder created on the new hard disk, for example, "D:\SearchIndex";
- add to the file "[Configuration folder TeamWox]\config\teamwox.cfg" the following note: "search_path=way to the folder where the files were copied";
- start the TeamWox server by running the following command in the command line: "updater.exe / start".

Therefore, the search indexes storage will be on another hard disk. With the high user activity, it will reduce the server load and improve TeamWox performance.

For system security, you can back up data. This allows, if necessary, to restore the data system for the time of backing up. To configure the system backup, go to the "Administration -> Backup" tab:

Administration

Overview	Make backup						
Connection							
Settings							
Security							
→ Backup	<p>For your system security, TeamWox Server backup is performed at a special time. This allows creating restoration points.</p> <p>Backup path <input style="width: 80%;" type="text" value="backups"/></p> <p>Backup depth <input style="width: 40px;" type="text" value="7"/> days</p> <p><input checked="" type="checkbox"/> Automatically shut down TeamWox if the power supply is low</p> <p><input type="checkbox"/> Delete all files marked for deletion</p> <p style="text-align: center;"><input type="button" value="Update"/></p>						
Groups							
Users							
Modules							
Sounds							
Requests							
Journal	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 70%;">Date</th> <th style="width: 25%;">Size</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td>Base (78 files)</td> <td style="text-align: right;">51 Mb</td> </tr> </tbody> </table>		Date	Size	1	Base (78 files)	51 Mb
	Date	Size					
1	Base (78 files)	51 Mb					

In "Backup path" specify the path for storing backup copies. It can be relative, absolute or network. By default, this field has "backups" signification, and all backups are saved into the place of installation of TeamWox system to the "backups" folder. The best way to improve the reliability of the system is to specify the path on another hard disk or on a secure network storage.

In the "Depth of backup" field, set the number of days of keeping backup copies. Backup copies older than the specified time will be automatically deleted from the server. It is recommended to leave the depth by default - 7 days.

In the "Backup" tab the "Automatically shut TeamWox at low power supply level" option is provided. Tick here for automatic shutdown of TeamWox system at low power supply level. This will prevent loss of data when battery power is low and the server is disconnected.

After configure the parameters, click the "Save" button in the lower part of the tab.

Attention: The process of the TeamWox server backup happens incrementally: at the beginning of each month a full backup copy is created, which is stored in the specified directory under the name "YYYY.MM.DD.". In later backups only those changes are recorded that differ the full backup copy (created in the beginning of the month) from the new ones. These copies are also stored in the specified directory under the name "YYYY.MM.DD.HH.MM.". TeamWox also independently starts the backup process before the automatic updating of the system.

To begin manual backup, press the "Create a backup copy" button on the Quick Command panel of the "Administration -> Backup" module

Information about the created backup copies is displayed in the lower part of the working area where date and size of the created files are shown. If you put the mouse cursor on one of backup copies in the table, "Restore" and "Delete" buttons will appear in the end of the "Date" field. With the help of these buttons one can restore information from this backup copy or delete it.

After you configure "Administration" and "E-Mail" modules, we can say that the minimum setup of the TeamWox system is done. However, users will be able to work in the system, but won't get the maximum effect from the usage of TeamWox. We strongly recommend to go through all the steps and configure all the system modules to get a complete product. After all the stages are done, it's possible to say that the TeamWox system is fully configured.



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