CUBE - PRO Quick Reference Card

Generated: August 25, 2025

■ System Access

Login URL:	http://your-server:5000
Admin Username:	admin (change after first login)
Configuration Path:	Main Menu → Configuration
Reports Path:	Main Menu → Reports
Support Email:	support@rubixsolutions.com

■ First-Time Setup Checklist

■ 1. Change default admin password ■ 2. Create departments (Configuration → User Management → Departments) ■ 3. Create user accounts (Configuration → User Management → Users) ■ 4. Set up assignment groups (Configuration → User Management → Assignment Groups) ■ 5. Configure work order categories (Configuration → Work Orders → Categories) ■ 6. Set up priority levels (Configuration → Work Orders → Priorities) ■ 7. Configure email settings (Configuration → Email → SMTP Settings) ■ 8. Set up notification rules (Configuration → Email → Notification Rules) ■ 9. Test work order creation process ■ 10. Train users and provide access

■ Common Administrative Tasks

Task	Navigation Path	Key Notes
Add New User	Config → User Mgmt → Users → Add	Assign role and department
Reset Password	Config → User Mgmt → Users → Edit User	Generate temporary password
Create Department	Config → User Mgmt → Departments → Add	Assign manager
Add Work Category	Config → Work Orders → Categories	Set SLA and assignment group
Configure Email	Config → Email → SMTP Settings	Test connection before saving
View System Logs	Config → System → Audit Logs	Monitor user activity
Generate Reports	Reports → Report Builder	Schedule automated delivery
Backup System	Config → System → Backup	Verify backup integrity

■ User Roles & Permissions

Role	Key Permissions	Typical Users
Admin	Full system access, user management, config admin	IT administrators, system managers
Manager	Approve work orders, view reports, manage team	Department heads, supervisors
User	Create/update work orders, view assigned tasks	Employees, technicians
Viewer	Read-only access to work orders and reports	Executives, auditors

■ Work Order Status Flow

Draft → Submitted → Approved → In Progress → Completed → Closed Alternative flows: • Draft → Cancelled (if not needed) • Submitted → Rejected → Draft (if approval denied) • In Progress → On Hold → In Progress (if temporarily suspended)

■ Emergency Procedures

Situation	Immediate Action	Follow-up
System Down	Check server status, restart if needed	Review logs, contact support
Database Issues	Stop application, backup current state	Run integrity check, restore if needed
User Locked Out	Reset account in User Management	Review security logs
Email Not Working	Check SMTP settings and test	Verify server connectivity
Performance Issues	Check server resources	Analyze logs, optimize database

■■ Key Settings & Configurations

Setting	Location	Purpose
Password Policy	Config → Security → Password Rules	Set complexity requirements
Session Timeout	Config → Security → Session Settings	Auto-logout timing
Email Templates	Config → Email → Templates	Customize notification content
Report Schedules	Reports → Scheduled Reports	Automate report delivery
Audit Logging	Config → System → Audit Settings	Track user activities
Backup Schedule	Config → System → Backup	Automated data protection

■ **Pro Tips:** • Always test changes in a non-production environment first • Keep regular backups before making major configuration changes • Document all customizations and configuration changes • Review user access permissions quarterly • Monitor system performance and logs regularly ■ **Support:** For technical assistance, contact support@rubixsolutions.com