CUBE - PRO

Enterprise Work Order Management System

System Administrator Configuration Guide

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1. Introduction

Welcome to the CUBE - PRO Enterprise Work Order Management System Administrator Guide. This comprehensive guide will walk you through the complete setup and configuration of your work order management system. This guide is designed for system administrators who need to: • Configure the system for their organization • Set up users, departments, and access controls • Configure work order workflows and approval processes • Manage system settings and maintenance

Prerequisites

Before beginning the configuration process, ensure you have: • Administrator access to the CUBE - PRO system • Understanding of your organization's workflow processes • List of departments and user roles in your organization • Email server configuration details (if using email notifications)

Important: This guide assumes you have already installed and deployed the CUBE - PRO system. For installation instructions, please refer to the Installation Guide.

2. Initial System Setup

2.1 First Login

Follow these steps for your first login to the system: 1. Open your web browser and navigate to your CUBE - PRO URL 2. You will see the login screen with the CUBE - PRO branding 3. Use the default administrator credentials (these should have been provided during installation) 4. Upon successful login, you will be directed to the main dashboard

■ Screenshot: Login screen showing the CUBE - PRO interface with username and password fields

2.2 Change Default Administrator Password

CRITICAL: Immediately change the default administrator password for security. Steps to change password: 1. Click on your username in the top navigation bar 2. Select "Profile" from the dropdown menu 3. Click "Change Password" button 4. Enter your current password 5. Enter a strong new password (minimum 8 characters, include uppercase, lowercase, numbers) 6. Confirm the new password 7. Click "Update Password"

Security Warning: Use a strong password and store it securely. This account has full administrative access to your work order management system.

3. User Management Configuration

3.1 User Management Overview

The User Management module allows you to create and manage user accounts, assign roles, and configure access permissions. This is one of the most critical configurations as it determines who can access what features in your system.

3.2 Accessing User Management

To access User Management: 1. From the main dashboard, look for the "Configuration" menu in the navigation bar 2. Click on "Configuration" to expand the menu 3. Under "User Management", you will see options for: • User Management - Main user configuration • Department Management - Organize users by department • Assignment Groups - Group users for work assignment • Approval Delegation - Set up approval workflows

3.3 Creating New Users

To create a new user account: 1. Navigate to Configuration → User Management → User Management 2. Click the "Add New User" button (usually a "+" icon or green button) 3. Fill in the required information: • **Username:** Unique identifier for login (cannot be changed later) • **Email:** User's email address (used for notifications) • **First Name:** User's first name • **Last Name:** User's last name • **Phone:** Contact phone number (optional) • **Department:** Select from configured departments • **Role:** Assign appropriate role (Admin, Manager, User, etc.) • **Manager:** Select the user's direct manager • **Assignment Group:** Select relevant assignment group • **Active Status:** Enable/disable the account 4. Set a temporary password or use auto-generated password 5. Click "Create User" to save

3.4 Understanding User Roles

Role	Permissions	Typical Use
Admin	Full system access, configuration, user management	System administrators, IT staff
Manager	Approve work orders, view reports, manage team	Department heads, supervisors
User	Create work orders, update assigned tasks	Regular employees, technicians
Viewer	Read-only access to work orders and reports	Executives, auditors

4. Department Management

Departments help organize users and work orders by functional areas of your organization. Proper department configuration is essential for routing work orders and generating meaningful reports.

4.1 Creating Departments

To create a new department: 1. Navigate to Configuration → User Management → Department Management 2. Click "Add New Department" button 3. Fill in the department information: • **Department Name:** Clear, descriptive name (e.g., "IT Support", "Facilities") • **Department Code:** Short abbreviation (e.g., "IT", "FAC") • **Description:** Brief description of department function • **Manager:** Select department head/manager • **Budget Code:** For cost tracking (optional) • **Active Status:** Enable/disable department 4. Click "Save Department"

4.2 Department Configuration Best Practices

• **Consistent Naming:** Use clear, standardized department names • **Logical Grouping:** Group related functions together • **Manager Assignment:** Always assign a manager for approval workflows • **Regular Review:** Periodically review and update department structure • **Documentation:** Maintain documentation of department responsibilities

5. Assignment Groups Configuration

Assignment Groups allow you to create specialized teams that can be assigned work orders based on skills, availability, or location. This is particularly useful for technical teams or specialized service groups.

5.1 Creating Assignment Groups

To create an assignment group: 1. Navigate to Configuration → User Management → Assignment Groups 2. Click "Add New Assignment Group" 3. Configure the group: • **Group Name:** Descriptive name (e.g., "Network Technicians", "HVAC Team") • **Group Code:** Short identifier • **Description:** Group's purpose and responsibilities • **Group Leader:** Select group supervisor • **Skill Tags:** Add relevant skill keywords • **Active Status:** Enable/disable group 4. Add group members: • Select users from available list • Assign roles within the group (Lead, Member, Backup) • Set availability schedules if needed 5. Save the assignment group

5.2 Assignment Group Examples

Group Name	Purpose	Members
IT Support Level 1	Basic IT support and troubleshooting	Help desk technicians
Facilities Maintenance	Building maintenance and repairs	Maintenance staff, contractors
Network Infrastructure	Network and server maintenance	Network administrators, engineers
Security Team	Physical and cyber security	Security officers, IT security

6. Approval Delegation Setup

Approval Delegation allows you to set up automated approval workflows for work orders. This ensures proper authorization and accountability for work requests while maintaining efficiency in your processes.

6.1 Configuring Approval Rules

To set up approval delegation: 1. Navigate to Configuration → User Management → Approval Delegation 2. Click "Add New Approval Rule" 3. Define the approval criteria: • **Rule Name:** Descriptive name for the rule • **Trigger Conditions:** - Work order value threshold (e.g., >$1000) - Department or category specific - Priority level requirements - Time-sensitive criteria 4. Set approval hierarchy: • **Primary Approver:** First level approval • **Secondary Approver:** For higher value/priority items • **Backup Approvers:** When primary is unavailable • **Auto-Approval:** For routine, low-value requests 5. Configure notification settings: • Email notifications to approvers • Escalation timelines • Reminder frequencies 6. Test the approval workflow 7. Activate the rule

6.2 Common Approval Scenarios

Scenario 1: Cost-Based Approval • Under $500: Auto-approve • $500-$2000: Department manager approval • Over $2000: Department manager + Finance approval **Scenario 2: Emergency Work Orders** • High priority: Auto-approve, notify management • After-hours: On-call manager approval • Safety-critical: Immediate approval with post-review **Scenario 3: Vendor/Contractor Work** • Internal staff: Standard approval • External vendors: Procurement + Department approval • Emergency contractors: Manager approval + compliance review

7. Work Order Categories & Priorities

7.1 Setting Up Work Order Categories

Categories help organize and route work orders effectively. Proper categorization enables better reporting, resource allocation, and workflow management. To configure categories: 1. Navigate to Configuration → Work Order Settings → Categories 2. Click "Add New Category" 3. Configure category details: • **Category Name:** Clear, descriptive name • **Category Code:** Short identifier for reporting • **Description:** Purpose and scope of category • **Default Assignment Group:** Auto-assign to relevant team • **SLA (Service Level Agreement):** Expected response/completion time • **Cost Center:** For budget tracking • **Required Fields:** Mandatory information for this category 4. Set category-specific workflows if needed 5. Save and activate the category

Category	Description	Typical SLA	Assignment Group
IT Support	Computer, software, network issues	4 hours	IT Support Team
Facilities	Building maintenance, utilities	24 hours	Facilities Team
Equipment Repair	Machinery, tools, equipment	8 hours	Maintenance Team
Safety Issue	Safety hazards, compliance	2 hours	Safety Team
Vendor Service	External contractor work	Varies	Procurement Team

7.2 Setting Up Priority Levels

Priority levels help ensure urgent work orders receive appropriate attention and resources. Recommended priority structure: • **Critical (P1):** System down, safety hazard - Response within 1 hour • **High (P2):** Significant impact, urgent - Response within 4 hours • **Medium (P3):** Standard business impact - Response within 24 hours • **Low (P4):** Minor impact, convenience - Response within 72 hours • **Planned (P5):** Scheduled maintenance - Response as scheduled

8. Status Configuration

Work order statuses track the lifecycle of requests from creation to completion. Proper status configuration ensures clear communication and effective workflow management.

8.1 Default Status Configuration

Status	Description	Color	Next Status Options
Draft	Work order being created	Gray	Submitted, Cancelled
Submitted	Awaiting approval/assignment	Blue	Approved, Rejected
Approved	Approved, awaiting assignment	Green	In Progress, On Hold
In Progress	Work actively being performed	Orange	Completed, On Hold
On Hold	Work temporarily suspended	Yellow	In Progress, Cancelled
Completed	Work finished successfully	Dark Green	Closed
Cancelled	Work order cancelled	Red	None
Closed	Work order closed/archived	Black	None

8.2 Creating Custom Statuses

To create custom statuses for your organization: 1. Navigate to Configuration → Work Order Settings → Statuses 2. Review existing statuses 3. Click "Add New Status" 4. Configure status properties: • **Status Name:** Clear, action-oriented name • **Status Description:** When and how this status is used • **Color Code:** Visual indicator for dashboards • **Status Type:** Active, Closed, Cancelled • **Auto-notifications:** Send emails when status changes • **Required Actions:** What must be done in this status • **Time Limits:** Maximum time allowed in this status 5. Set status transitions (which statuses can follow) 6. Test the status workflow 7. Activate for use

9. Email Configuration

Email configuration enables automated notifications for work order updates, approvals, and reminders. Proper email setup is crucial for keeping stakeholders informed and maintaining workflow efficiency.

9.1 SMTP Server Configuration

To configure email settings: 1. Navigate to Configuration → Email Configuration → SMTP Settings 2. Enter your email server details: • **SMTP Server:** Your email server hostname • **SMTP Port:** Usually 587 (TLS) or 465 (SSL) • **Security:** TLS/SSL encryption method • **Username:** Email account for sending notifications • **Password:** Email account password or app password • **From Address:** Address that appears as sender • **From Name:** Display name for emails 3. Test the configuration: • Click "Send Test Email" • Enter a test recipient email • Verify the test email is received 4. Save configuration if test successful

9.2 Common SMTP Provider Settings

Provider	SMTP Server	Port	Security	Notes
Gmail	smtp.gmail.com	587	TLS	Requires app password
Outlook/Hotmail	smtp-mail.outlook.com	587	TLS	Use account credentials
Yahoo	smtp.mail.yahoo.com	587	TLS	Requires app password
Office 365	smtp.office365.com	587	TLS	Use account credentials
Custom/On-premise	Your server	Varies	TLS/SSL	Contact IT department

9.3 Email Template Configuration

Customize email templates for different notification types: 1. Navigate to Configuration → Email Configuration → Email Templates 2. Select template type to customize: • Work order created • Work order assigned • Work order completed • Approval required • Status updates • Reminder notifications 3. Customize template content: • Subject line with dynamic variables • Email body with HTML formatting • Include relevant work order details • Add company branding/signature 4. Use available variables: • {{work_order_number}} - Work order ID • {{title}} - Work order title • {{status}} - Current status • {{assigned_to}} - Assigned user name • {{due_date}} - Due date • {{priority}} - Priority level 5. Preview and test templates 6. Save and activate

10. Notification Rules

Notification rules determine when and to whom email notifications are sent. Properly configured rules ensure relevant stakeholders are informed without overwhelming users with unnecessary emails.

10.1 Creating Notification Rules

To create notification rules: 1. Navigate to Configuration → Email Configuration → Notification Rules 2. Click "Add New Rule" 3. Define rule criteria: • **Rule Name:** Descriptive name for the rule • **Trigger Event:** What event triggers the notification - Work order created - Status changed - Assignment changed - Due date approaching - Priority escalated 4. Set conditions: • **Category filter:** Specific categories only • **Priority filter:** Priority levels that trigger • **Department filter:** Specific departments • **Value threshold:** Cost-based triggers 5. Define recipients: • Work order creator • Assigned user • Department manager • Assignment group members • Custom email addresses 6. Set timing: • Immediate notification • Delayed notification • Recurring reminders • Business hours only 7. Test and activate the rule

10.2 Sample Notification Rules

Rule Name	Trigger	Recipients	Timing
New Work Order	Work order created	Creator, Manager	Immediate
High Priority Alert	High/Critical priority	All relevant staff	Immediate
Assignment Notice	Work order assigned	Assigned user	Immediate
Due Date Reminder	24 hours before due	Assigned user, Manager	Daily at 9 AM
Completion Notice	Work order completed	Creator, Manager	Immediate
Overdue Alert	Past due date	Assigned user, Manager	Every 4 hours

11. Reporting Setup

The reporting module provides insights into work order performance, trends, and resource utilization. Proper setup ensures you have the metrics needed for decision-making and process improvement.

11.1 Available Report Types

Report Type	Purpose	Key Metrics	Frequency
Work Order Summary	Overall performance overview	Total, completed, pending counts	Daily/Weekly
Department Performance	Department-specific metrics	Response times, completion rates	Weekly/Monthly
User Productivity	Individual performance	Assignments, completion times	Weekly/Monthly
Cost Analysis	Financial tracking	Costs by category, department	Monthly/Quarterly
SLA Compliance	Service level adherence	On-time completion rates	Daily/Weekly
Trend Analysis	Historical patterns	Volume trends, seasonal patterns	Monthly/Quarterly

11.2 Configuring Automated Reports

To set up automated reporting: 1. Navigate to Reports → Report Configuration 2. Click "Create Scheduled Report" 3. Configure report parameters: • **Report Name:** Descriptive name • **Report Type:** Select from available templates • **Data Range:** Time period to include • **Filters:** Department, category, priority filters • **Format:** PDF, Excel, or CSV 4. Set delivery schedule: • **Frequency:** Daily, weekly, monthly • **Day/Time:** When to generate and send • **Recipients:** Email addresses for delivery • **Subject line:** Email subject template 5. Preview the report 6. Save and activate scheduling

11.3 Setting Up KPI Dashboard

Configure key performance indicators for the main dashboard: **Essential KPIs to display:** • Open work orders count • Overdue work orders • Average response time • Completion rate (current period) • High priority work orders • Team workload distribution • Cost trend (if applicable) • Customer satisfaction scores **Dashboard customization:** • Role-based dashboard views • Drill-down capabilities • Real-time data refresh • Export capabilities • Mobile-friendly display

12. Security & Access Control

Proper security configuration protects your work order data and ensures users have appropriate access levels. This chapter covers essential security settings and best practices.

12.1 Role-Based Access Control

> Configure access permissions by role: 1. Navigate to Configuration → Security → Role Management 2. Review default roles and permissions 3. Customize permissions as needed: • **Admin Role:** Full system access • **Manager Role:** Department oversight, approvals • **User Role:** Create and update work orders • **Viewer Role:** Read-only access 4. Create custom roles if needed: • Define specific permission sets • Assign to specialized functions • Test access levels thoroughly 5. Implement least privilege principle: • Grant minimum necessary permissions • Regular access reviews • Remove unused accounts promptly

12.2 System Security Settings

Essential Security Configurations: ✓ **Password Policy:** • Minimum length: 8 characters • Complexity requirements: uppercase, lowercase, numbers • Password expiration: 90 days • Password history: Prevent reuse of last 5 passwords ✓ **Session Management:** • Session timeout: 30 minutes of inactivity • Concurrent session limits • Secure session cookies • Logout on browser close ✓ **Login Security:** • Account lockout after 5 failed attempts • Lockout duration: 15 minutes • Strong captcha for repeated failures • Login attempt logging ✓ **Data Protection:** • HTTPS encryption for all traffic • Database encryption at rest • Regular security backups • Audit trail logging ✓ **Access Monitoring:** • User activity logging • Failed login alerts • Privilege escalation monitoring • Regular access reviews

12.3 Backup and Recovery

Implement robust backup and recovery procedures: **Backup Strategy:** • Daily automated backups • Weekly full system backups • Off-site backup storage • Regular recovery testing **What to backup:** • Database (work orders, users, configuration) • File attachments and documents • System configuration files • Custom templates and reports **Recovery procedures:** • Document step-by-step recovery process • Test recovery procedures quarterly • Maintain recovery time objectives (RTO) • Train staff on emergency procedures

13. System Maintenance

Regular system maintenance ensures optimal performance, data integrity, and system reliability. This chapter outlines essential maintenance tasks and schedules.

13.1 Regular Maintenance Schedule

Task	Frequency	Description	Impact
Database cleanup	Weekly	Remove old logs, temporary data	Low
System health check	Daily	Monitor performance metrics	None
User account review	Monthly	Deactivate unused accounts	Medium
Backup verification	Weekly	Verify backup integrity	None
Security updates	As needed	Apply critical security patches	Medium
Performance tuning	Quarterly	Optimize database and queries	Low
Capacity planning	Monthly	Monitor storage and usage	None
Log rotation	Weekly	Archive and compress log files	Low

13.2 Performance Monitoring

Monitor these key performance indicators: **System Performance:** • Response times for page loads • Database query performance • Server resource utilization (CPU, memory, disk) • Network latency and throughput **Application Metrics:** • User session counts • Work order processing times • Email delivery success rates • Error rates and types **Monitoring Tools:** • Built-in performance dashboard • Server monitoring tools • Database performance monitors • Application log analysis **Alert Thresholds:** • Set alerts for critical metrics • Define escalation procedures • Document response procedures • Regular threshold reviews

13.3 Database Maintenance

Regular database maintenance tasks: **Weekly Tasks:** • Update database statistics • Rebuild fragmented indexes • Clean temporary tables • Verify backup integrity **Monthly Tasks:** • Archive old work order data • Analyze space usage • Review query performance • Update maintenance plans **Quarterly Tasks:** • Full database integrity check • Performance baseline review • Capacity planning assessment • Recovery procedure testing

14. Troubleshooting

14.1 Common Issues and Solutions

Login and Authentication Issues

Problem: Users cannot log in **Possible Causes and Solutions:** • Incorrect credentials - Verify username/password, reset if necessary • Account locked - Check account status, unlock if needed • Session timeout - Clear browser cache and cookies • Browser compatibility - Try different browser or update current one • Network connectivity - Verify network connection and firewall settings **Problem:** Frequent logouts **Solutions:** • Increase session timeout in system settings • Check for browser security settings blocking cookies • Verify system time synchronization

Email Notification Issues

Problem: Emails not being sent **Troubleshooting Steps:** 1. Check SMTP configuration settings 2. Test SMTP connection manually 3. Verify email account credentials 4. Check firewall/network restrictions 5. Review email server logs 6. Verify recipient email addresses **Problem:** Emails going to spam **Solutions:** • Configure SPF/DKIM records • Use authenticated SMTP • Avoid spam trigger words • Include unsubscribe links • Monitor sender reputation

Performance Issues

Problem: Slow page load times **Diagnostic Steps:** 1. Check server resource utilization 2. Analyze database query performance 3. Review network latency 4. Check for large file attachments 5. Monitor concurrent user load **Solutions:** • Optimize database queries • Increase server resources • Implement caching strategies • Archive old data • Optimize file storage

Data and Reporting Issues

Problem: Missing or incorrect data in reports **Troubleshooting:** 1. Verify report filter settings 2. Check data source integrity 3. Review user permissions 4. Validate date range parameters 5. Check for data synchronization issues **Problem:** Work orders not appearing **Possible Causes:** • Permission restrictions • Incorrect status filters • Department/category filters • Date range limitations • Data corruption (rare)

Appendix A: Common Issues Quick Reference

Issue	Quick Solution	Reference Section
Can't log in	Reset password, check account status	14.1
No email notifications	Check SMTP settings	9.1, 14.1
Slow performance	Check server resources, database	13.2, 14.1
Missing work orders	Check filters and permissions	14.1
Reports not generating	Verify data range and permissions	11.2, 14.1
Users can't create WO	Check role permissions	12.1
Approval workflow stuck	Review approval delegation rules	6.1
Wrong assignment group	Check category assignment rules	5.1, 7.1

Appendix B: Configuration Best Practices

User Management Best Practices: • Use consistent naming conventions • Regularly review and update user accounts • Implement strong password policies • Document role assignments and responsibilities • Conduct quarterly access reviews **Work Order Configuration Best Practices:** • Keep categories simple and intuitive • Set realistic SLA timeframes • Use consistent priority definitions • Regularly review and update workflows • Train users on proper categorization **Email and Notification Best Practices:** • Don't over-notify - balance information with noise • Use clear, actionable subject lines • Include relevant work order details • Test all notification rules thoroughly • Provide unsubscribe options where appropriate **Security Best Practices:** • Implement least privilege access • Regular security updates and patches • Monitor user activity and access patterns • Maintain current backups and test recovery • Document all security procedures **Maintenance Best Practices:** • Follow regular maintenance schedules • Monitor system performance continuously • Keep documentation current • Plan for capacity growth • Train multiple staff on system administration

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