



PROTEUS MMX TRAINING MANUAL –
COMPANY

EAGLE TECHNOLOGY, INC.



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COMPANY

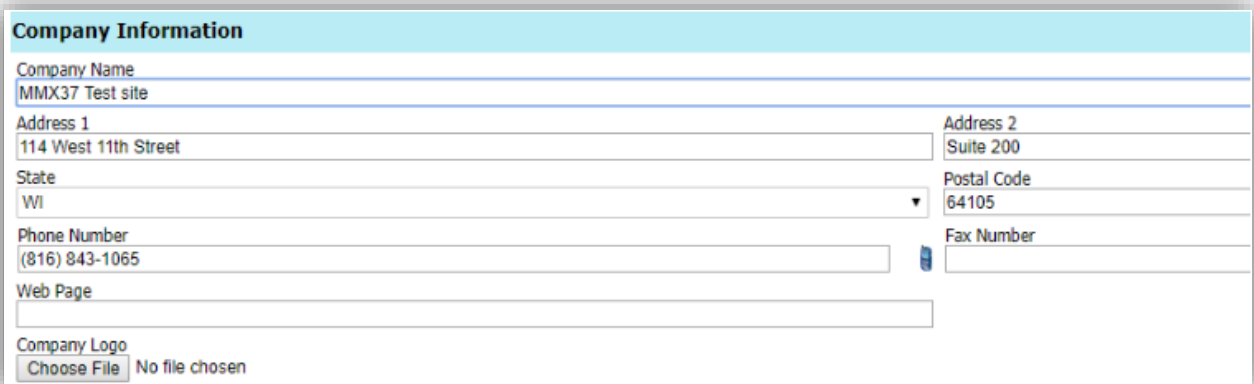
1. COMPANY INFORMATION

The **Company Information** page in the **Company** Functional Area is used to store the basic company contact and address information. This information should be entered at the time of installation. Proteus MMX will use this data for the Location Browser hierarchy within the following modules:

- Assets
- Asset Systems
- Stockrooms
- Tools
- Employees
- Contractors
- Vendors
- Service Requests
- Work Orders

The company address will also be displayed as the billing address on purchase orders. (This information can always be entered or revised later, should any changes occur).

Note: This page does not contain a Record Navigator.

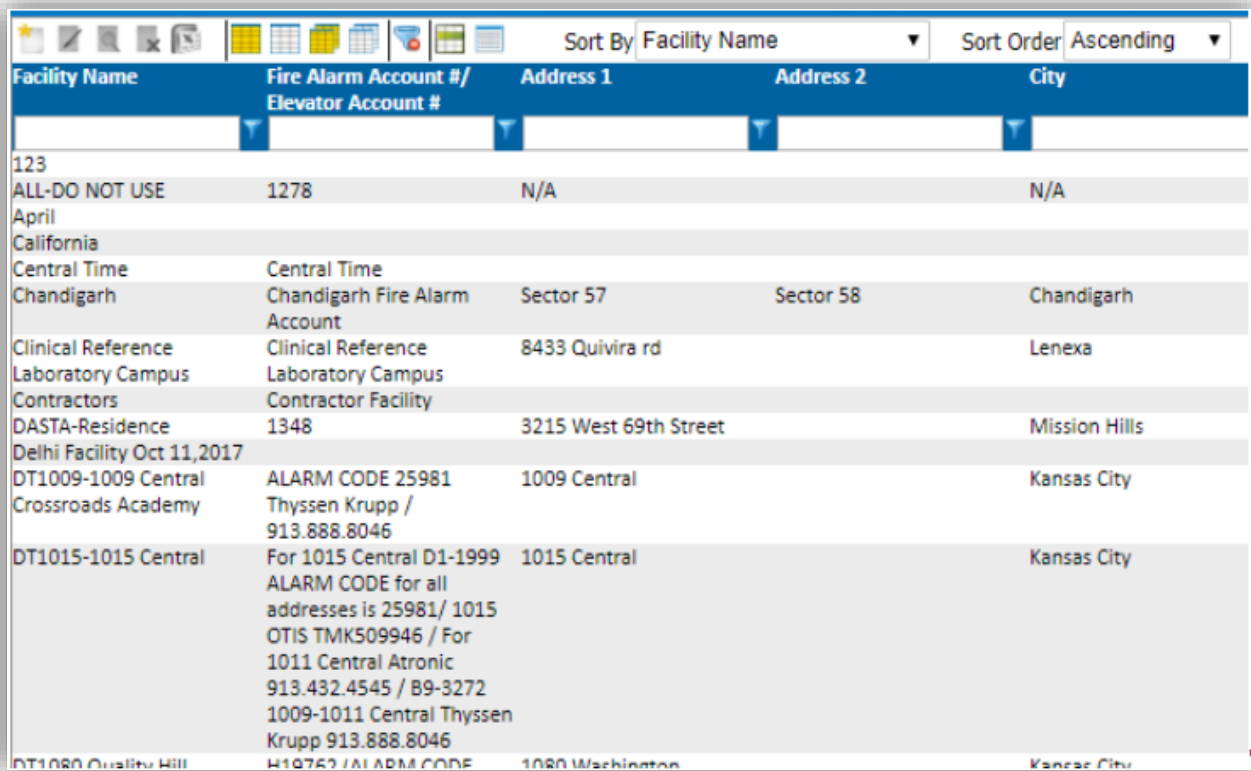


The screenshot shows the 'Company Information' form with the following fields and values:

Company Information	
Company Name	
MMX37 Test site	
Address 1	Address 2
114 West 11th Street	Suite 200
State	Postal Code
WI	64105
Phone Number	Fax Number
(816) 843-1065	
Web Page	
Company Logo	
Choose File No file chosen	

2. FACILITIES

The **Facilities** page in the **Company** menu is used to document the main facilities within your company. This could include your company headquarters as well as your manufacturing plant(s), warehouses and any other buildings in other states. Proteus MMX will use this data to populate the Location Browsers. These facilities will automatically be populated into tree listings in Proteus MMX. It is best to enter these locations at installation time.



Facility Name	Fire Alarm Account #/ Elevator Account #	Address 1	Address 2	City
123				
ALL-DO NOT USE	1278	N/A		N/A
April				
California				
Central Time Chandigarh	Central Time Chandigarh Fire Alarm Account	Sector 57	Sector 58	Chandigarh
Clinical Reference Laboratory Campus	Clinical Reference Laboratory Campus	8433 Quivira rd		Lenexa
Contractors	Contractor Facility			
DASTA-Residence	1348	3215 West 69th Street		Mission Hills
Delhi Facility Oct 11, 2017				
DT1009-1009 Central Crossroads Academy	ALARM CODE 25981 Thyssen Krupp / 913.888.8046	1009 Central		Kansas City
DT1015-1015 Central	For 1015 Central D1-1999 ALARM CODE for all addresses is 25981/ 1015 OTIS TMK509946 / For 1011 Central Atronic 913.432.4545 / 89-3272 1009-1011 Central Thyssen Krupp 913.888.8046	1015 Central		Kansas City
DT1080 Quality Hill	H19762 / ALARM CODE	1080 Washington		Kansas City

Proteus MMX can segregate data based on facilities. Each facility needs to be assigned MMX roles for individuals who belong to those roles to view the data. This is advantageous for large organizations that require the ability to disallow access for select groups of users while maintaining the ability for managers and overseers to view the organization.

There are some points to consider when using facilities:

1. Facilities should only be used for the purpose above, and not as a general organizational tool for data. There are five other location tiers (Site, Building, Floor, Room, and Area) that can be used for this. Too many facilities will slow down the ability of Proteus MMX to render the organizational tree in Assets, Locations, and anywhere else the tree is displayed.
2. Facilities were designed to be an alternative to a second full implementation of Proteus MMX and not just another tool in the standard installation of MMX. For 90% of our installations, one facility should be fine.

- When using facilities, be sure to assign the proper roles to them.

Note: Most users will only use **one (1)** facility. The advantage of multiple facilities allows for data segregation. Essentially, given 2 facilities, A & B, individuals from Facility A can only see their specific information. These 2 separate facilities can be stored in the same database but independently accessible.

3. LOCATIONS

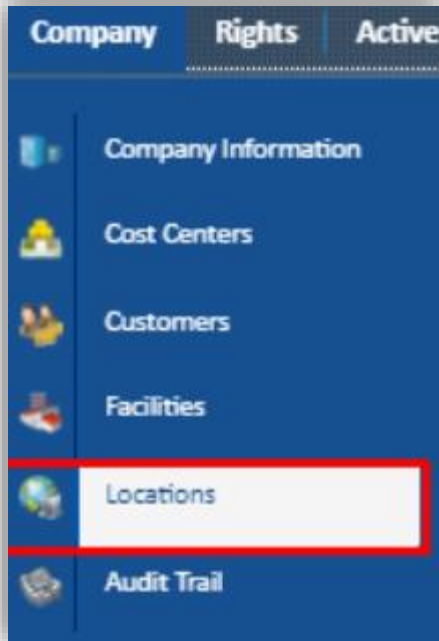
The **Locations** page in the **Company** Functional Area is used to store the basic company location information. Proteus MMX will use this data to populate the navigation tree within Facilities. These locations will be automatically populated into any tree listing in Proteus MMX. The individual locations can also have specific data associated with it (Name, Address, Cost History, etc.). It is best to enter these locations at installation. (This information can always be entered or revised later, should any changes occur.

Note: This page does not contain a Record Navigator.

Locations	Location Type	Description	Address 1
MMX37 Test site	Company		114 West 11th Street
Locations	Location Type	Description	
123	Facility		
ALL-DO NOT USE	Facility	1278	
April	Facility		
California	Facility		
Central Time	Facility	Central Time	
Chandigarh	Facility	Chandigarh Fire Alarm Account	
Locations	Location Type	Description	Address
Site Delhi Block B	Site		Site Delhi Block B
Site Location Center	Site		Site
Site Noida Block B	Site		Site Noida Block B
Clinical Reference Laboratory Campus	Facility	Clinical Reference Laboratory Campus	
Contractors	Facility	Contractor Facility	
DASTA-Residence	Facility	1348	
Delhi Facility Oct 11,2017	Facility		
DT1009-1009 Central Crossroads Academy	Facility	ALARM CODE 25981 Thyssen Krupp / 913.888.8046	

4. LOCATION HIERARCHY

Company Locations are created and stored in a tree structure that follows a semi-flexible hierarchy. If utilized properly, the hierarchy will aid in the visual designation of the location of Assets, Stockroom, etc.



The **Location** hierarchy is listed as follows; from largest to smallest:

- Company (**Largest**)
- Facility
- Site
- Building
- Floor
- Room
- Area* (**Smallest**)

Note 1: A location of a larger level can never be added as a child to a parent of a smaller level. For example, a *Floor* cannot be added as a child to another *Building*.

Note 2: A location cannot be added to a parent of the same location type. For example, a *Building* cannot be added as a child to another *Building*.

Note 3: *An *Area* is a wildcard and can be added to any node except for another *Area*.

TO ADD A LOCATION:

Note: All locations are automatically added as children of the currently selected node.

1. Select the current location
2. Click the **New** icon
3. Enter the Location Name, Location Type, and any other relevant data

TO DELETE A LOCATION:

1. Select a location to delete
2. Click the **Delete** icon
3. Click the **Yes** icon at the verification prompt

Note: When a location is deleted, all children of the deleted location will be moved up to the parent.

TO RENAME A LOCATION OR EDIT ANY DATA WITHIN THE LOCATION:

1. Select a location to rename
2. Click the **Edit** icon
3. Enter the modified data
4. Click the **Save** icon

TO ISSUE A WORK ORDER AGAINST A LOCATION:

1. Select a location
 2. Click the **Issue Work Order** icon
 3. Enter all necessary information
 4. Click the **Save** icon
-

Once a Location is saved, an additional link is provided at the bottom of the **Details** Tab, showing **Cost History**.

The **Cost History** link displays the cost history for the selected location. This pop-up shows the year-to-date and life-to-date costs for Preventive and Demand Maintenance on this location, as well as any asset that belongs in this location. These figures are based on accumulated labor and material costs on closed Preventive Maintenance and Demand Maintenance work orders.

Note: These figures cannot be edited since they are calculated values.

THE CALCULATIONS FOR THESE FIELDS ARE DERIVED FROM THE FOLLOWING FORMULAS:

MATERIAL: Qty. Allocated * Unit cost (if Unit Cost <> 0)

Calculated when the work order is closed.

LABOR: Labor Rate for each employee * Actual Hours of Labor Rate

Calculated when the work order is closed.

The screenshot shows a 'Cost History' window with two sections: 'Year To Date Totals' and 'Life To Date Totals'. Each section has a table with columns for Labor Cost Amount, Labor Cost Currency, Maintenance Type, Material Cost Amount, Material Cost Currency, Total Cost Amount, and Total Cost Currency. The 'Year To Date Totals' section is currently empty, displaying 'No Data To Display'. The 'Life To Date Totals' section shows three rows of data, all with values of 0.00 USD for Labor and Material costs, and 0.00 USD for Total costs. The Maintenance Type for all three rows is 'DemandMaintenance'.

Year To Date Totals:						
Sort By: Total Cost Currency		Sort Order: Descending		Notes:		
Labor Cost Amount	Labor Cost Currency	Maintenance Type	Material Cost Amount	Material Cost Currency	Total Cost Amount	Total Cost Currency
No Data To Display						

Life To Date Totals:						
Sort By: Total Cost Amount		Sort Order: Ascending		Notes:		
Labor Cost Amount	Labor Cost Currency	Maintenance Type	Material Cost Amount	Material Cost Currency	Total Cost Amount	Total Cost Currency
0.00 USD		DemandMaintenance	0.00 USD		0.00 USD	
0.00 USD		DemandMaintenance	0.00 USD		0.00 USD	
0.00 USD		DemandMaintenance	0.00 USD		0.00 USD	

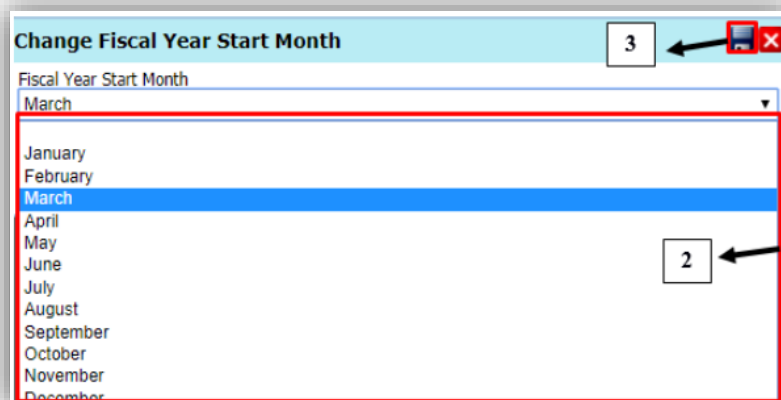
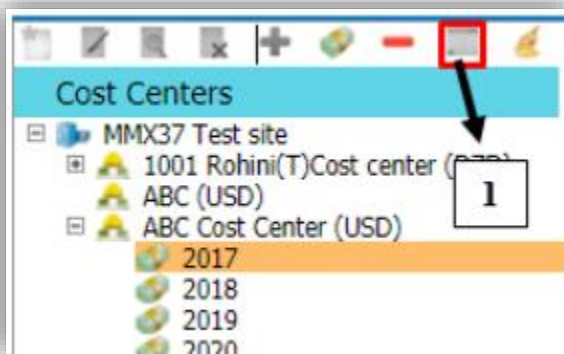
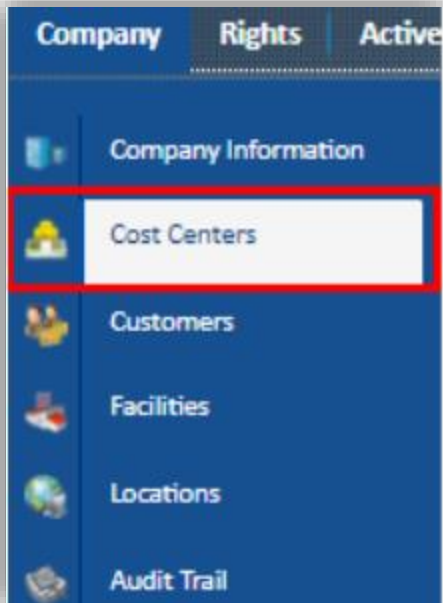
5. FISCAL YEAR

If you select the fiscal month as **January**, the screen will show the current year and the following months will show up from **Jan Current Year**.

Example: Jan 2017 to Dec 2017

YOU CAN ACCESS THIS FEATURE, BY FOLLOWING GOING TO:

COMPANY > COST CENTERS



Cost Center Budget

Period Year: 2019

	Labor	Materials	Total
Jan 2019	1261.00		3261.00
Feb 2019			0.00
Mar 2019			0.00
Apr 2019			0.00
May 2019			0.00
Jun 2019			0.00
Jul 2019			0.00
Aug 2019			0.00
Sep 2019			0.00