



PROTEUS MMX TRAINING MANUAL –
PROVIDERS

EAGLE TECHNOLOGY, INC.



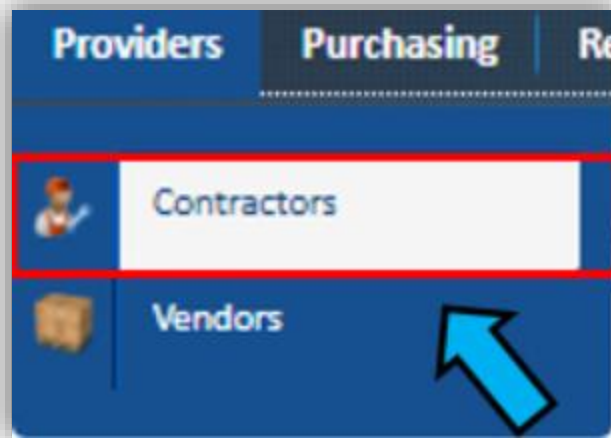
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CONTRACTORS

1. OVERVIEW

The **Contractor** page in the **Providers** Functional Area is used to record and continually maintain all information relevant to contractors and sub-contractors used by the company. Contractors provide labor and a service that can be essential to the daily production of the company.



When combined with the functions of the **Purchasing** area, contractor records can analyze, plan, and manage the equipment maintenance and inventory operations.

Every contractor is identified by a unique Contractor Code.

If there is not an existing Contractor database that can be converted to a Proteus MMX database, each contractor must be manually entered into **Contractors** or imported via the import template.

The fields listed in the Record Navigator are:

- Contractor Code
- Contractor Name
- Primary Contact
- Address 1
- Address 2
- City
- State
- Postal Code
- Region

- Country
- Contact Phone
- Contact Email
- Web Page
- Requester Contact Information
- REFM#/Reference #
- Resolution
- Building & Location
- User Fields 3-9

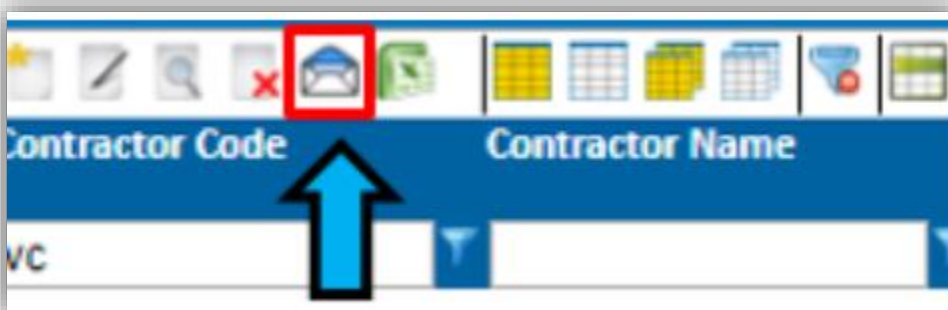
Contractor Code	Contractor Name	Primary Contact	Address 1	Address 2	City	State	Postal Code	Region	Country
VCCG-01	Vendor Chandigarh	Vendor South-Africa	Sector 4	Sector 4	NBD	81	2021	North	India
VCCG-02	Vendor Punjab	Contract Name - Vendor	Sector 27	Sector 28	Haryana	84	20112	West	India
VCCG-03	Contractor-01	Primary Contact - Sector	Address 1	Address 2	Haryana	84	8876	West	India
VCCG-04	Vendor Haryana	Vendor Haryana-2	Sect 27	Sect 28	Haryana	84	0172	South	India
VCCG-05	Vendor Punjab	Contract Name - Vendor	Sector 27	Sector 28	Haryana	84	20112	West	India
VCCG-06	Contractor-01	Primary Contact - Sector	Address 1	Address 2	Haryana	84	8876	West	India
VCCG-07	Contractor-01	Primary Contact - Sector	Address 1	Address 2	Haryana	84	8876	West	India
VCCG-08	Vendor South	Vendor South-Africa	Sector 4	Sector 4	NBD	81	2021	North	India

Record Navigator (Contractors)

2. E-MAIL A CONTRACTOR

TO SEND AN E-MAIL TO A CONTRACTOR:

1. Open **Contractor** from the **Providers** Functional Area
2. Select **Contractor**
3. Select the **E-Mail** icon
4. Enter message
5. Select **Send** icon when completed



3. DETAILS

The **Details** Tab consists of basic contractor fields and information about the specific contractor. These fields are:

- Contractor Code
- Contractor Name
- Address 1
- Address 2
- City
- State
- Country
- Zip Code
- Lead Time
- Web Page
- Contact Phone
- Contact Email
- Alternate Contact Phone
- Alternate Contact E-mail
- Region

Note 1: The required fields are Contractor Code and Contractor Name. All other fields are optional. We recommend using the same Contractor Code that is used by the Purchasing Department.

Note 2: Leaving information fields blank will decrease Proteus MMX's effectiveness in building complete maintenance history records. Make sure all available information has been gathered prior to recording.

The screenshot displays a software interface with a 'Details Tab' highlighted. The form contains the following fields and values:

Field	Value
Contractor Code	VCCBG-02
Contractor Name	Vendor Punjab
Address 1	Sector 27
Address 2	Sector 28
City	Haryana
Country	India
Zip Code	201322
Contact Phone	+12 (32) 32- x2
Alternate Contact Phone	+1322 (34) 455-4 x1
Alternate Contact Email	Punjab@Vendor.com
Requester Contact Information	REF # / REFERENCE #
Resolution	UserField 5
UserField 7	UserField 8
Building And Location	Is Vendor

Below the form is a 'Notes' section with a text area and a toolbar. The toolbar includes icons for text formatting (bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, decrease indent, increase indent, decrease indent, increase indent, font color, background color, text color, text size, text align, text wrap, text direction, text style, text color, background color, text color, text size, text align, text wrap, text direction, text style) and a 'Details Tab' button.

4. LABOR CRAFTS

The **Labor Crafts** tab contains a list of all labor craft codes and is used to record and continually maintain classifications rates or maintenance. There may be up to **five (5)** different labor rates for each employee.

The fields listed in the Labor Craft are:

- Negotiated Labor Craft Rate 1
- Negotiated Labor Craft Rate 2
- Negotiated Labor Craft Rate 3
- Negotiated Labor Craft Rate 4
- Negotiated Labor Craft Rate 5



Labor Craft Code	Description	Negotiated Labor Craft Rate 1 Amount	Negotiated Labor Craft Rate 1 Currency	Negotiated Labor Craft Rate 2 Amount	Negotiated Labor Craft Rate 2 Currency
IRS Housekeeping Supervisor	IRS Housekeeping Supervisor				
Labor 04	Labor 04	5.00	USD	5.00	USD
CDG-LC-01	CDG-Labor-01	5.00	USD	5.00	USD

Labor Crafts Tab

5. WORK ORDER

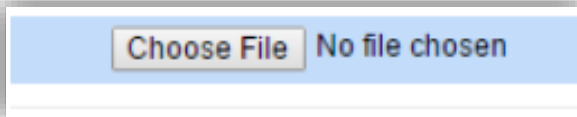
The **Work Order** tab contains a list of all Work Orders that have been or can be assigned to this Contractor. This data is read-only and is used for reference purposes only.



6. ATTACHMENTS

TO ADD ATTACHMENTS TO A CONTRACTOR:

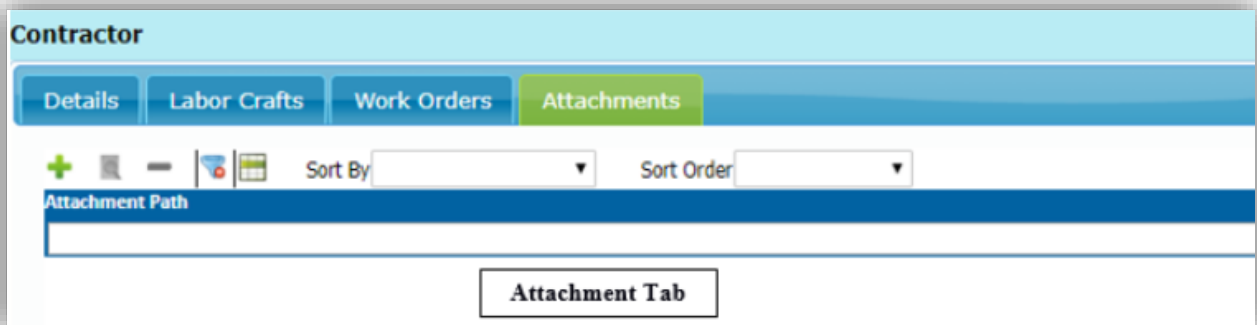
1. Under the Attachment Tab, select **Add**
2. Select the **Choose File** button



3. Upload your selection by selecting the folder icon

TO REMOVE ATTACHMENTS FROM A CONTRACTOR:

1. Open **Contractors** from the **Providers** Functional Area
2. Under the **Contractor** tab, select a Contractor from the grid
3. Select the **Edit** icon
4. Under the **Attachment** tab, select the attachment you want to remove
5. Select the **Remove** icon



7. ENTERING DATA

TO ENTER A NEW CONTRACTOR INTO THE DATABASE, FOLLOW THESE STEPS:

1. From the **Contractors Record Navigator**, select the **New** icon.
2. Enter the **Contractor Code**, **Contractor Name**, and any other relevant information.

Note 1: Each **Contractor Code** must be unique.

Note 2: You can select the **Contractor** icon on the **Details** screen if the contractor is also a contractor that services any of your assets. When you select this icon, the contractor will also be added to the Contractors module automatically.

3. Select the **Save** icon on the top-right of the screen. (You can also select the **Save and Continue** icon on the top-right of the screen if you wish to add another new Asset now.)

VENDORS

1. OVERVIEW

The **Vendor** page in the **Providers** Functional Area is used to record and continually maintain all information relevant to the suppliers of assets, tools, parts, contracted services, or any other purchase commodity. Vendors supply goods that are vital to daily operations.



When combined with the functions of the **Purchasing** area, vendor records can analyze, plan, and manage the equipment maintenance and inventory operations.

Every vendor is identified by a unique Vendor Code.

If there is not an existing vendor database that can be converted to a Proteus MMX database, each vendor must manually be entered into **Vendors** or imported via the import template.

The fields in the Record Navigator are:

- Vendor Code
- Vendor Name
- Address 1
- Address 2
- City
- State
- Zip Code
- Region
- Country
- Contact Phone
- Contact E-mail
- Web Page

Sort By ▼ Sort Order ▼					
Vendor Code	Vendor Name	Address 1	Address 2	City	Postal Code
AOS80	AO Smith				
BAL82	Baltimore Air Coil				
BRAS80	Brasche				
BRO80	Groen				
BEL80	Bell & Gossett				
AME80	American Air Filter				
DEC80	Dechamps				
PEN80	Penn				
HOB80	Hobart				
FRAS80	Franklin				
ONA80	Onan				
HAT80	Hatco				
MCQ01	McQuay International	13600 Industrial Park Blvd		Minneapolis	55425
TEM82	Temperature Engineering				
OH80	Johnson Controls				

Record Navigator (Vendors)

2. E-MAIL A VENDOR

TO SEND AN E-MAIL TO A VENDOR:

1. Open **Vendors** from the **Providers** Functional Area
2. Select a vendor
3. Select the **E-Mail** icon
4. Enter message
5. Select the **Send** icon

3. DETAILS

The **Details** tab consists of basic vendor fields and information about the specific vendor. These fields are:

- Vendor Code
- Vendor Name
- Address 1
- Address 2
- City
- State
- Country
- Zip Code
- Lead Time
- Web Page
- Contact Phone

- Alternate Contact Phone
- Alternate Contact E-mail
- Region

Note 1: The required fields are Vendor Code and Vendor Name. All other fields are optional. We recommend using the same Vendor Code that is used by the Purchasing Department.

Note 2: Leaving information fields blank will decrease Proteus MMX's effectiveness in building complete maintenance history records. Make sure all available information has been gathered prior to recording.

The screenshot shows a software interface with a tabbed menu at the top: 'Details' (selected), 'Parts', 'Assets', 'Attachments', and 'Return Log'. Below the tabs is a form for entering vendor information. The form is organized into two columns. The left column contains fields for: Vendor Code (with 'GROB0' entered), Vendor Name (with 'Groen' entered), Address 1, City, Contact Phone, Alternate Contact Phone, Contact Name, REF# / REFERENCE #, UserField 5, and UserField 8. The right column contains fields for: Address 2, State, Contact Email, Alternate Contact Email, Alternate Contact Name, UserField 3, UserField 6, and UserField 9. A central box labeled 'Details Tab' is overlaid on the bottom of the form.

4. PARTS

The **Parts** tab contains a list of all parts that have been or can be purchased from this vendor. The association of a part to a vendor is made in **Stockrooms**. This data is read-only and is used for reference purposes only.

The screenshot shows a web application interface for a 'Vendor' record. At the top, there's a light blue header with the word 'Vendor'. Below it is a navigation bar with five tabs: 'Details', 'Parts' (which is highlighted in green), 'Assets', 'Attachments', and 'Return Log'. Under the 'Parts' tab, there are three icons (a magnifying glass, a calendar, and a list) followed by 'Sort By' and 'Sort Order' dropdown menus. Below these is a table header with three columns: 'Vendor Part Number', 'Part Number', and 'Part Name'. Each column has a small blue arrow icon next to it. The table body is empty, and the text 'No Data To Display' is centered below the header. At the bottom right of the interface, there is a button labeled 'Parts Tab'.

Vendor Part Number	Part Number	Part Name
No Data To Display		

5. ASSETS

The **Assets** tab contains a list of all assets that have been or can be purchased from this vendor. The association of an asset to a vendor is made in Assets. This data is read-only and is used for reference purposes only.

The screenshot shows the 'Vendor' record interface with the 'Assets' tab selected. The interface includes a header bar with tabs: 'Details', 'Parts', 'Assets' (highlighted), 'Attachments', and 'Return Log'. Below the tabs are two dropdown menus for 'Sort By' and 'Sort Order'. A table with two columns, 'Asset Number' and 'Asset Name', is shown with a blue header and a single empty row. Below the table, the text 'No Data To Display' is visible. At the bottom right, there is a button labeled 'Assets Tab'.

6. ENTERING DATA

TO ENTER A NEW VENDOR INTO THE DATABASE:

1. From the **Vendors Record Navigator**, select the **New** icon.
2. Enter the **Vendor Code**, **Vendor Name**, and any other relevant information.

Note 1: Each **Vendor Code** must be unique.

Note 2: You can select '**Is Contractor**' icon on the **Details** screen if the vendor is also a contractor that services any of your assets. When you select this icon, the vendor will also be added to the Contractors module automatically.

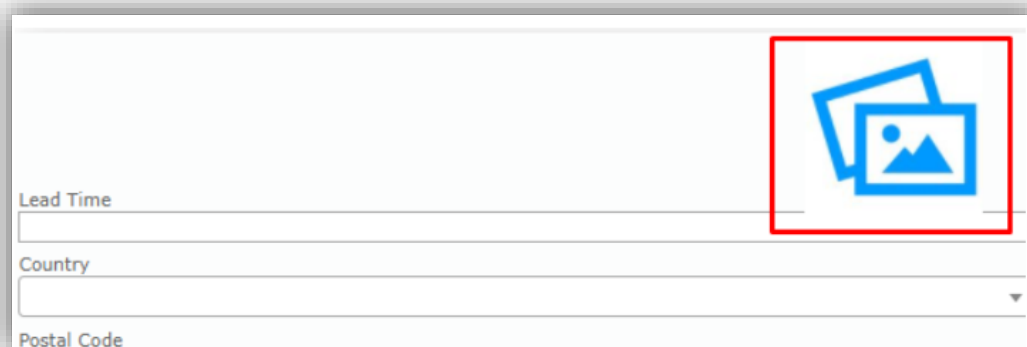
3. Select the **Save** icon on the top-right of the screen. (You can also select the **Save and Continue** icon on the top-right of the screen if you wish to add another new asset now.)

7. IMAGE UPLOAD ICON (CONTRACTORS & VENDORS)

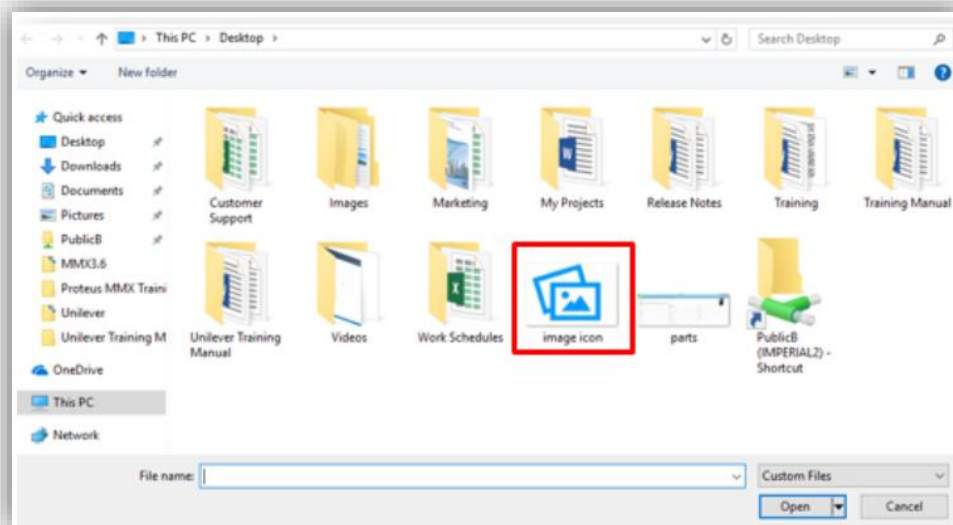
This feature gives you the ability to upload a picture of a contractor or vendor, directly from the Details page.

TO UTILIZE THIS FEATURE, YOU MUST:

1. Go to the **Providers** drop-down module
2. Click on the **Contractors** or **Vendors**.
3. Select a contractor or vendor record
4. Click the **Edit** icon
5. Scroll to the right-side of the screen to locate the **Image** icon



When you click the icon, you will have the option to select a photo saved on your device.



Select the image and click **Open**. Then, the image you've selected will populate, in place of the old icon.