



PROTEUS MMX QUICK START GUIDE

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QUICK START GUIDE

GETTING STARTED

Congratulations on your purchase of Proteus MMX! This Quick Start Guide contains information to help you along in your journey. The basics of the system will be discussed as well as the major functions that can be performed in each module and on each page. For further information, please refer to the *Proteus MMX User Manual*.

HOME SCREEN

The **Home Screen** is the first screen that you will see when you log into Proteus MMX.

The Home Screen is comprised of the following sections:

- Quick Links
- Performance Indicators (KPIs)
- Message Board
- My Work Orders

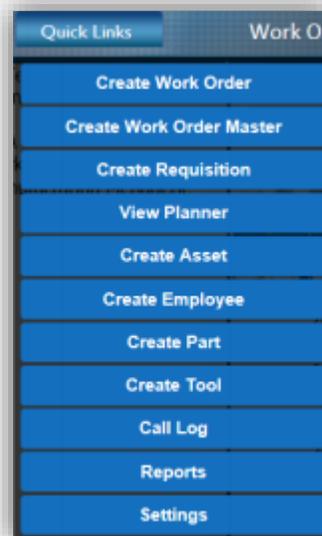
NOTE: This information will only be shown if an employee is associated to the user.

QUICK LINKS

The **Quick Links** section of the Home Screen provides for an easy method to access some of the most common tasks in Proteus MMX.

The tasks available to the user are:

- Create Work Order
- Create Work Order Master
- Create Requisition
- View Planner
- Create Asset
- Create Employee
- Create Part
- Create Tool
- Call Log
- Reports
- Settings



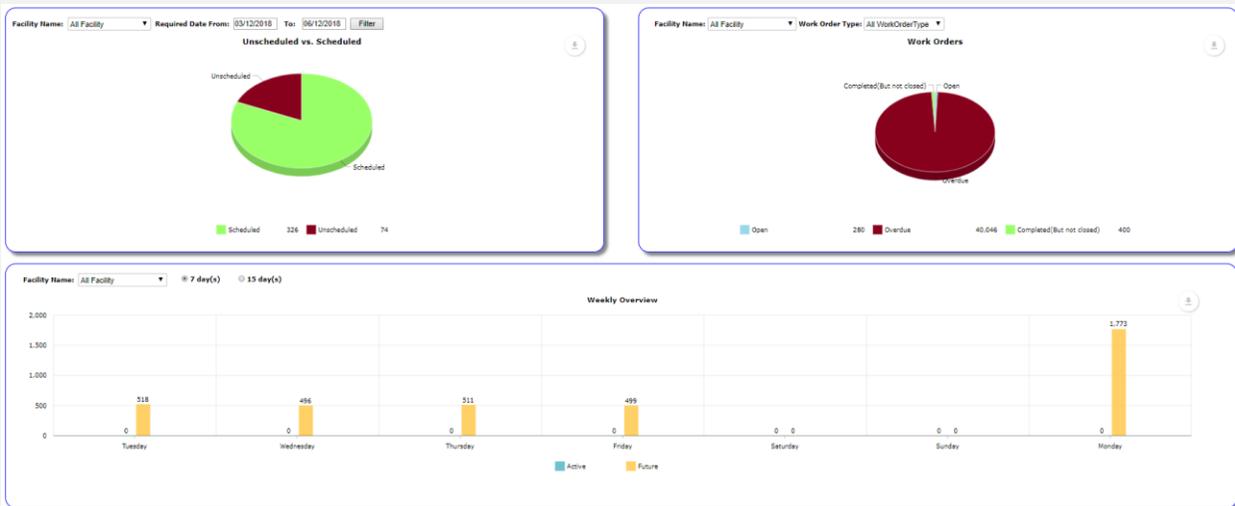
PERFORMANCE INDICATORS

The **Performance Indicators** section of the Home Screen provides for a quick display of the KPIs that are available in Proteus MMX.

The KPIs that available to the user are:

- Weekly Overview
- Work Order Backlog
- Unscheduled vs. Scheduled

They can be further filtered by either *Employee* or *Contractor*.



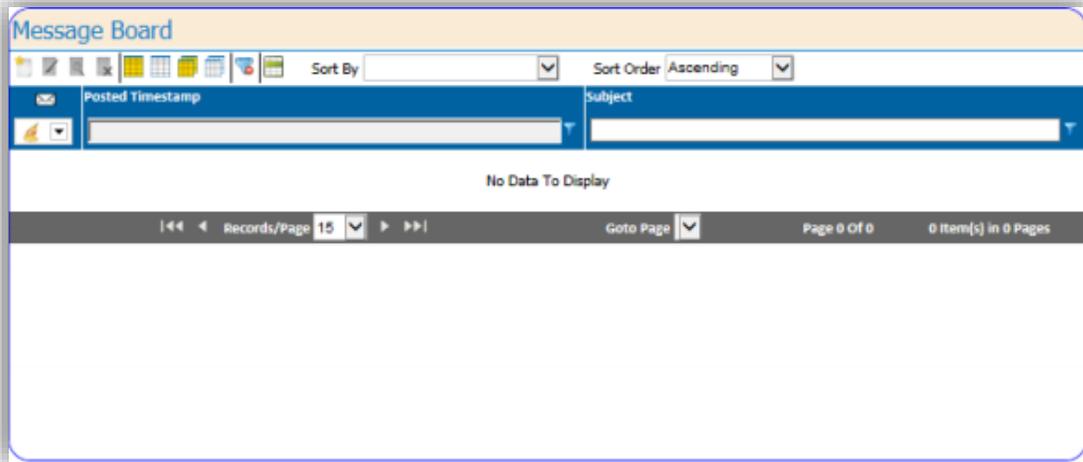
MESSAGE BOARD

The **Message Board** section of the Home Screen provides for a simple manner in which to deliver messages to the users of Proteus MMX. Messages can be sent to individual users or the entire user base.

NOTE: The *Message Board* is completely independent of your email system and is completely contained in Proteus MMX.

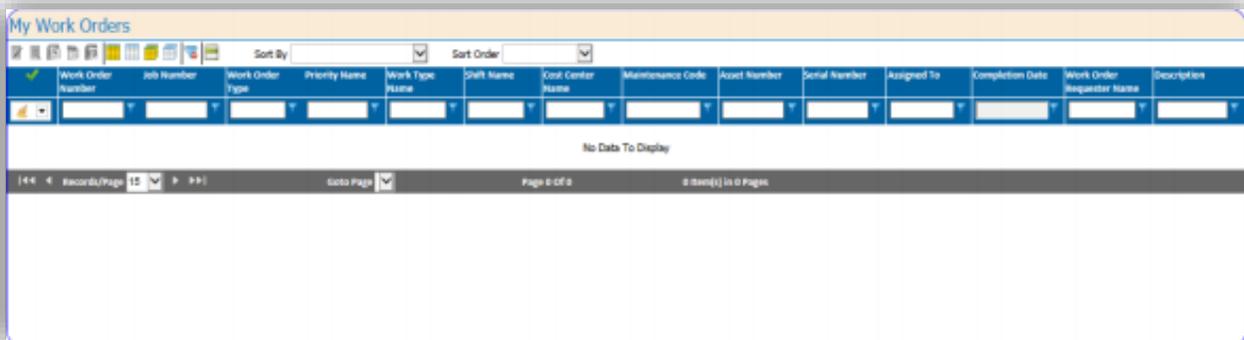
TO SEND A MESSAGE:

1. Select **New**
2. Fill out desired information
3. To send a message to everyone, leave the **Employee** field blank
4. Select **Post**



MY WORK ORDERS

The **My Work Orders** section of the Home Screen provides a quick reference guide of open work orders assigned to the currently logged in user. When a user logs into the system, all active work orders that are assigned to that employee (either by employee, contractor, or task) will be displayed. From here, the users can filter, open, and edit their work orders.



LOCATION BROWSER

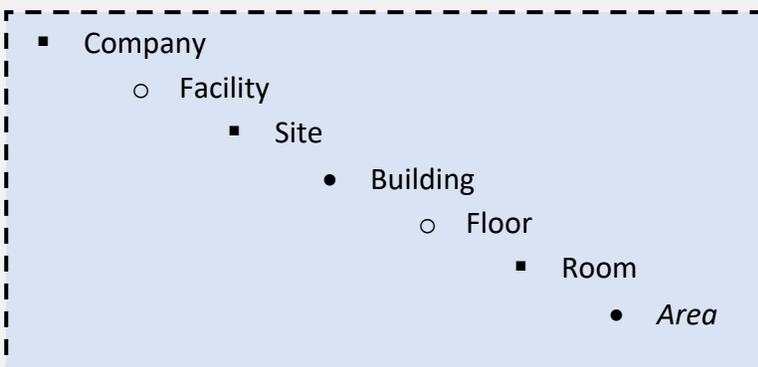
The **Location Browser**, where applicable, is located on the left side of the screen and contains a tree structure of information relating to the current module. The purpose is to visually locate and display data on certain records. The *Location Browser* functions much like common file browsers, with facets such as *expand* and *contract* designated by **(+)** and **(-)**, respectively. When a user selects a node in the Location Browser, the *Icon List* and *Grid* will refresh to display the correct data.

The *Location Browser* is located on the following pages:

- Assets
- Asset Systems
- Stockrooms
- Tools
- Employees
- Contractors
- Vendors
- Service Requests
- Work Orders
- Work Order Masters
- Cost Centers
- Locations

The *Location Browser* provides for seven (7) levels of increasing granularity regarding to your physical facilities.

The levels of the *Location Browser* are listed below:



The above structure follows the common parent-child relationship. The exception to rule is the *Area* location. An *Area* is a wildcard that can be added as a child to any node (Site, Building, Floor or Room).

NOTE: An *Area* cannot be added under an *Area*.



MAIN FUNCTIONS

The ***Location Browser*** provides a method by which the user can filter the records in the grid. When the user selects on a location, the corresponding grid will refresh to show all records *at or below* that specific node. For example, if he the user were to select the *1st Floor Receiving Area* in pervious graphic, all assets in that area would be displayed in the grid. If the user were to select on the top-most node in the tree, the grid would display all assets in the system.

Also, the *Location Browser* is able to be filtered, in the case of the existence of many locations. The filter can be found at the bottom of *Location Browser*.

TO USE THE FILTER:

1. Select **Facility**
2. Select **Equal** to select a condition.
3. Enter text for your filter.
4. Select the **Filter** icon to make it active.
5. When done, select the **Broom** icon to clear the filter.



The image shows a filter configuration window. It contains two dropdown menus: the first is labeled 'Facility' and the second is labeled 'Equal'. Below these is a text input field. At the bottom left, there are two icons: a magnifying glass (labeled 'Filter') and a red 'X' (labeled 'Broom'). Below the icons is the text 'Hide Filter'.

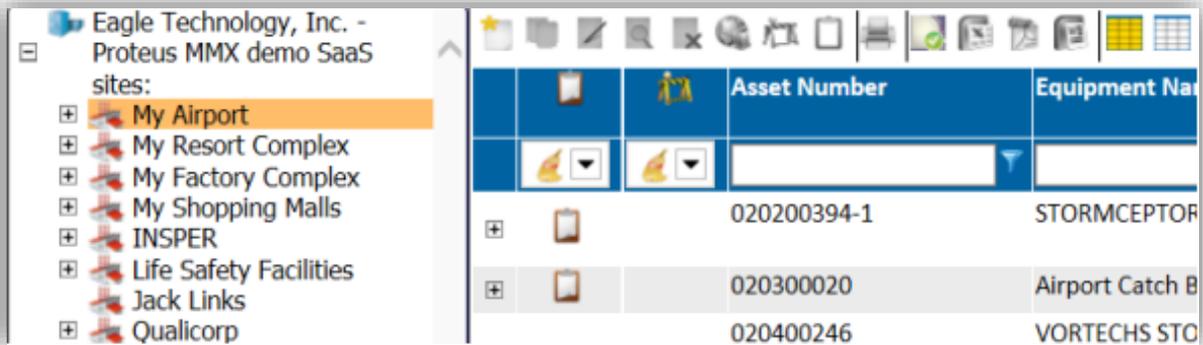
GRID

The **Grid** allows you to navigate through data displays. The *Grid* is generally comprised of two main sections:

- A Location Browser
- A Grid containing every record in the database with columns that are able to be sorted (ascending/descending) as well as positioned (horizontal column ordering). These preferences are saved on a per-user basis.

NOTE 1: The records displayed in the grid will be displayed based on the currently selected node in the tree. If the top most node is selected, all records will be displayed. Otherwise, they will be filtered based on the currently selected node.

NOTE 2: In some instances, there is no Location Browser.



SELECTING A RECORD

To select a record, the user will select on the row of the record. Likewise, you can use the standard methods of **CTRL / SHIFT** selection to provide for multiple record selection.

SORTING COLUMNS

Columns in the Grid can be sorted in either ascending or descending order. To sort a column, select on the **Sort By**, then **Sort Order** header and select the direction of the sort (ascending or descending).



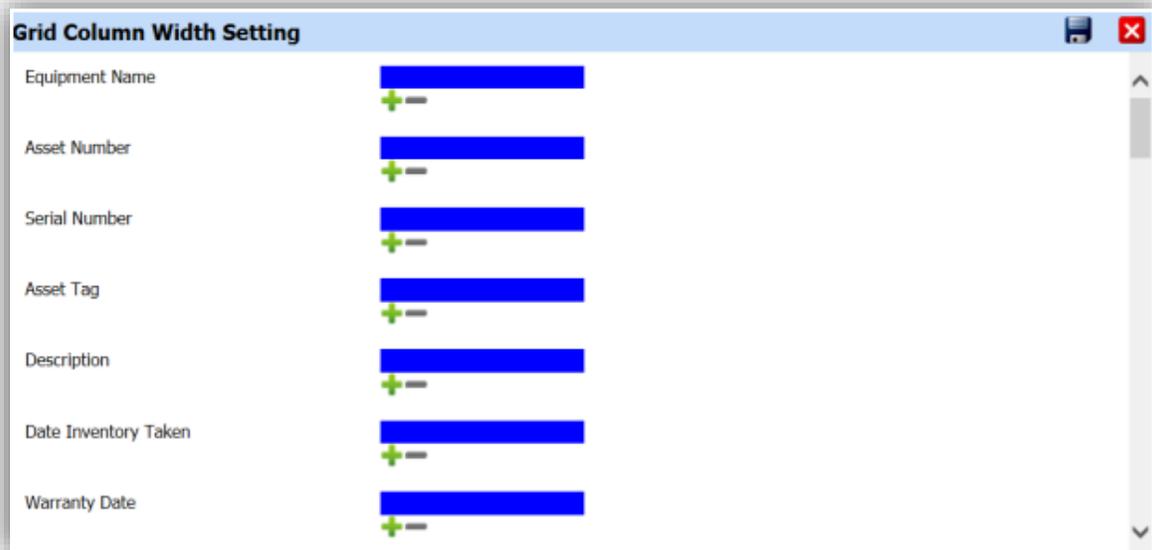
REORDERING COLUMNS

Columns in the Grid can be reordered and repositioned in any order. To reorder or reposition the columns, select the **Column Setting** icon. The Grid Column Setting will display, allowing the user to select a column title and then the **up or down arrows** on the right to move the column. To add or remove columns from the display, select the column title and select the left and right arrows to add and/or remove. Select the **Save** icon to reflect changes.



RESIZING COLUMNS

Columns in the Grid can be resized. To resize the columns, simply select on the **Column Width** setting icon and select the **plus or minus** icons to adjust the widths for each column.



ICON LIST

The **Icon List**, located above the Grid, contains all tasks and actions that are relevant to, and can be performed on the current module. The tasks will refresh based on the currently selected record. For example, if there are no records on the screen, the only option displayed will be *New*.

The icons, from left to right:

- New
- Copy
- Edit
- View
- Delete



NOTE: A description of the icons that are specific to each module/page can be found within that page.

GRID-SPECIFIC ICONS

Every Grid has an icon row that offers increased functionality. A description of these icons is listed below:

ICON	DESCRIPTION
	Shows the number of records selected (across all pages)
	Show all rows
	Show only selected rows (visible when 1 or more records are selected)
	Select all rows
	Unselect all rows
	Select all rows on current page
	Unselect all rows on current page
	Saves the Grid personalization preferences (sizing, order, etc.)
	Export to Excel
	Export to Word
	Export to PDF

CREATING, COPYING, MODIFYING AND SAVING RECORDS

RECORDS

Records, stored in database table, are the foundation of Proteus MMX. It is important to remain aware of the ASCII Sort Order when data is being entered and records are being created. This is especially important when using the various query methods such as the *Type Search* and *Filter Row*. It is also of the utmost importance that all information that is entered is standardized and accurate in nature. All data should be entered using a predetermined set of rules regarding characters, spaces, periods, dashes, etc. For example, two users may add the same equipment record with the same part number, but the system will not recognize that these are duplicates because one user entered **AH 100**, while the other user entered **AH-100**.

CREATING RECORDS

The creation of a new records is the first step to unlocking the features of Proteus MMX. Records may be created from scratch from within the following modules:

MENU	MODULE
Assets	Assets, Asset Systems
Inventory	Parts, Stockrooms, Bill of Materials, Tools
Personnel	Employees, Labor Crafts
Providers	Contractors, Vendors
Service Requests	Service Requests
Purchasing	Requisitions, Purchase Orders
Work Orders	Work Orders, Work Order Masters, Tasks
Company	Company Information, Cost Centers, Customers, Facilities, Locations
Rights	Users, Roles

TO CREATE NEW RECORDS:

1. Select a menu and open the module in which to add a new record.
2. Select the **New** icon in the Grid. The user will be brought to the Details screen. All tabs will be displayed and the user may enter data for the new records. When moving among fields during the data entry process, use the **Tab** key rather than the **Enter** key.
3. Once all data is entered throughout the screen, the user may save the record in the database by selecting the **Save** icon.
4. The user will be returned to the Grid and the newly created record will be displayed in the grid according to the currently sorted column.

COPYING RECORDS

A quick way to create a new record that is similar to an existing record is to use the **Copy** feature.

TO COPY RECORDS:

1. Select a menu and open the module in which to copy a new record.
2. Select a record that you wish to copy from the Grid and select the **Copy** icon.
3. Modify the record data as needed, remaining aware of fields that are required or must be unique.
4. Select the **Save** icon.
5. The modified record will be copied and displayed in the grid according to the currently sorted column.

NOTE: There are certain fields that are both required to be present and required to be unique. Please see the *Reference* section of the selected module for further information.

MODIFYING RECORDS

The modification of records in Proteus MMX can be done by modifying the record details.

TO MODIFY RECORDS:

1. Select a menu and open the module in which to modify a record.
2. Select a record that you wish to modify from the Grid.
3. Select the **Edit** icon.
4. Modify the record data as needed, remaining aware of fields that are required or must be unique.
5. Select the **Save** icon.

6. The record will be modified and displayed in the grid according to the currently sorted column.

DELETING RECORDS

The deletion of records in Proteus MMX can be completed quickly through the Grid. Regarding incorrect or obsolete records, the user has the option to delete one record at a time as well as the option to delete multiple records at the same time.

TO DELETE RECORDS:

1. Select a menu and open the module in which to delete a record.
2. Select a record from the Grid.
3. Select the **Delete** icon.
4. If an error message is displayed upon attempt to delete a record, this means that the record cannot be deleted due to its current use elsewhere in Proteus MMX. For example, a part cannot be deleted from Parts Master if it is currently associated to a work order. Please contact the System Administrator for more information.

USING LISTS

LISTS

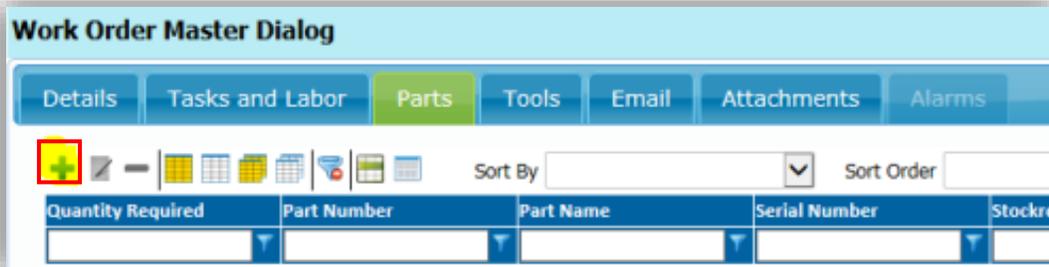
In Proteus MMX, lists can be thought of as a group of records grouped together for specific purpose. Lists are usually listed as tabs in the *Details* section of a specific module.

For example, in *Work Order Master* we have lists for Assets, Tasks, Parts, Tools, etc. The user can compile a listing of all assets, tasks, and parts that are associated to that specific work order master.

NOTE: Certain lists are read-only, and thus, the user does not have the ability to add or remove from them.

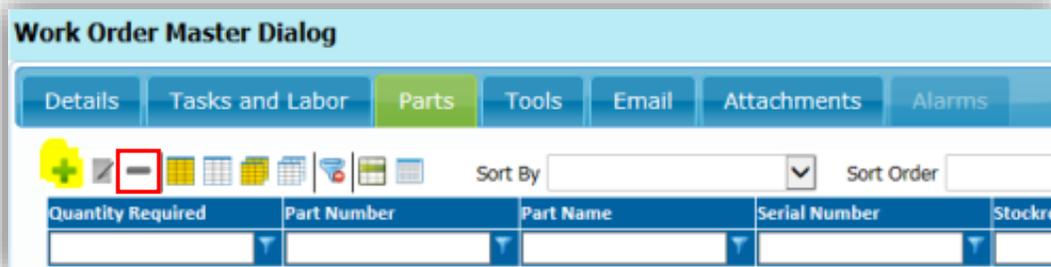
ADDING ITEMS TO A LIST:

1. Select the **Add (+)** icon.
2. Select a record from the pop-up.
3. Fill in all data/required fields.
4. Confirm your selection.
5. The record will now be added to the list.



REMOVING ITEMS FROM A LIST:

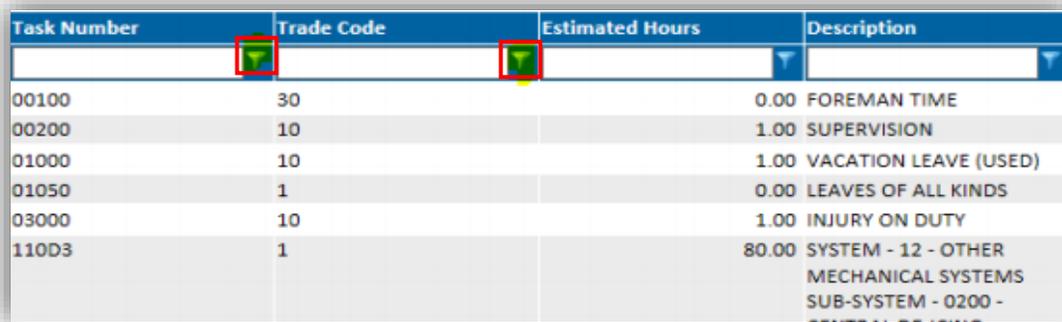
1. Select a record from the grid.
2. Select the **Remove (-)** icon.
3. Confirm your selection.
4. The record will now be removed from the list.



QUERYING RECORDS (FILTER ROW)

FILTERING RECORDS

Databases can become extremely large due to file size and record population/complexity. The user can considerably cut down the time it takes to locate a record or records by utilizing the Filter Row that is part of Proteus MMX. The Filter Row is always displayed in the grid, directly under the column headers.



Task Number	Trade Code	Estimated Hours	Description
00100	30		0.00 FOREMAN TIME
00200	10		1.00 SUPERVISION
01000	10		1.00 VACATION LEAVE (USED)
01050	1		0.00 LEAVES OF ALL KINDS
03000	10		1.00 INJURY ON DUTY
110D3	1		80.00 SYSTEM - 12 - OTHER MECHANICAL SYSTEMS SUB-SYSTEM - 0200 -

TO FILTER RECORDS:

1. Select a menu and open the module in which to utilize the Filter Row.
2. Choose the section by which to filter and enter the search string.

NOTE 1: The filter process might take a moment depending on the complexity of the filter as well as the number of records in the database.

NOTE 2: To clear a filter, the user can delete the text in the Filter Row.

DEFAULT FILTER

Proteus MMX contains functionality to automatically open up the current module with a pre-set, default filter. Once a filter is placed on a filter row, the filter will remain in place until the user clears it. This can be extremely beneficial for users who continually filter/sort by predetermined criteria.

FILTER TYPES

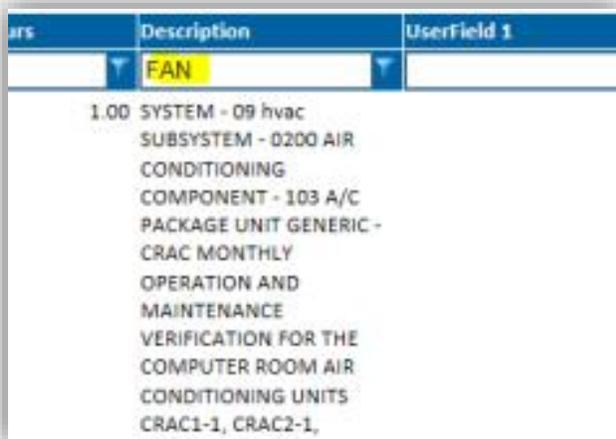
By default, the Filter Row utilizes the ***Begins With*** method of filtering. Proteus MMX will display only those records which start with the requested criteria when this radio icon is selected.

EXAMPLE: The user wants to view all assets that begin with: *FAN*

THE OTHER FILTER TYPES ARE SHOWN HERE:

- ✓ Begins with
- Contains
- Doesn't contain
- Ends with
- Equals
- Doesn't equal

RESULT: Only assets in which the Asset Number begins with *FAN* will be shown.



The screenshot shows a table with three columns: 'ars', 'Description', and 'UserField 1'. The 'ars' column contains the value '1.00'. The 'Description' column contains a multi-line text entry: 'SYSTEM - 09 hvac', 'SUBSYSTEM - 0200 AIR', 'CONDITIONING', 'COMPONENT - 103 A/C', 'PACKAGE UNIT GENERIC -', 'CRAC MONTHLY', 'OPERATION AND', 'MAINTENANCE', 'VERIFICATION FOR THE', 'COMPUTER ROOM AIR', 'CONDITIONING UNITS', 'CRAC1-1, CRAC2-1,'. The 'UserField 1' column is empty. The filter 'FAN' is applied to the 'ars' column, and the results are filtered to show only records starting with 'FAN'.

ars	Description	UserField 1
1.00	SYSTEM - 09 hvac SUBSYSTEM - 0200 AIR CONDITIONING COMPONENT - 103 A/C PACKAGE UNIT GENERIC - CRAC MONTHLY OPERATION AND MAINTENANCE VERIFICATION FOR THE COMPUTER ROOM AIR CONDITIONING UNITS CRAC1-1, CRAC2-1,	

UTILIZING DROP-DOWN AND POP-UPS

DROP-DOWNS/LOOKUP LISTS

Drop-downs, sometimes referred to as lookup/reference lists, are selection panels containing a list of choices for the corresponding field. They are accessed by selecting on the drop-down arrow on the right side of the field entry box. These lists are read-only and assist the user in selecting and adding a piece of data to the field.

NOTE: Drop-Down Lists are populated through the *Settings* module. These will be system-wide. All population of drop-down lists will be done from this single area.

TO ADD AN ITEM TO A DROP-DOWN:

1. Go to the **Settings** menu > **Assets** > **Categories** (for example).
2. Select **New**.
3. Enter your selection.
4. Select **Save**.
5. Repeat as necessary.

TO REMOVE AN ITEM FROM A DROP-DOWN:

1. Go to the **Settings** menu.
2. Select a module and a setting.
3. Click on your selection.
4. Select **Delete**.
5. Repeat as necessary.

TO EDIT AN ITEM IN A DROP-DOWN:

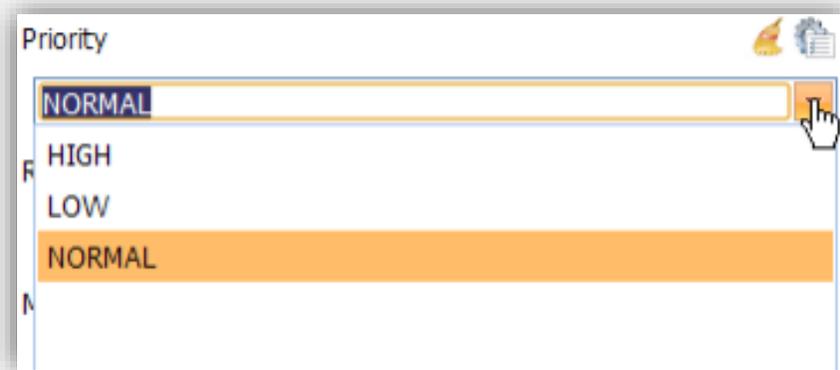
1. Go to the **Settings** menu.
2. Select a module and a setting.
3. Click your selection.
4. Select **Edit**.
5. Edit your information.
6. Repeat as necessary.

NOTE: If you edit an item in a drop-down, it will be changed system-wide. However, history records will not be changed, as they have already been closed.

TO USE A DROP-DOWN:

1. Select the arrow to the right of a field providing a drop-down list.
2. Select the record from the list.
3. The piece of data you selected will be inserted into the field.

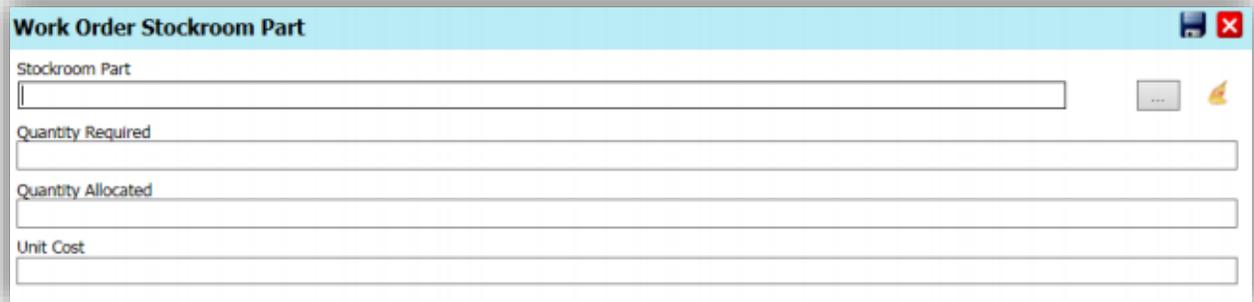
NOTE: Typing a letter or series of letters in the drop-down will filter the list to items beginning with that letter or series of letters. Items not matching the type-search characters will not be visible again until the field is cleared by deleting the text that was previously entered.



POP-UPS

Pop-ups are very useful and they are found throughout Proteus MMX. Pop-ups can contain a combination of many items. Some of these items have been previously discussed (drop-downs and grids), while others are commonplace (icons, radio icons, check boxes, etc.). A pop-up appears as a result of the user selecting a task or icon. Some common uses for pop-ups are:

- Creation of Items
- Addition to Lists
- Adjusting Quantities

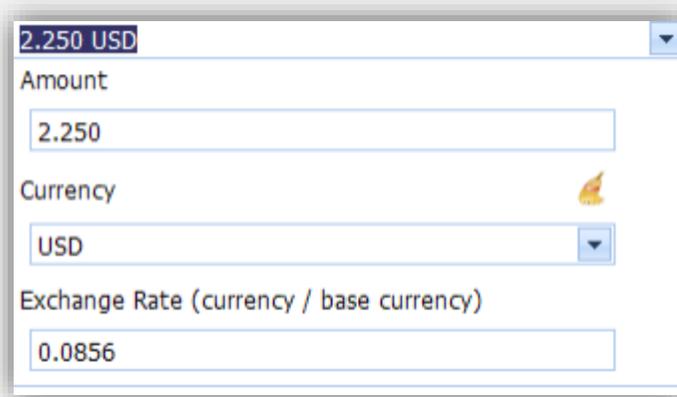


CURRENCY DROP-DOWNS

The drop-down lists for currency values include three (3) fields:

- Amount
- Currency
- Exchange Rate

Depending on the type of currency needed for the record, you can select different Currency types. The Exchange Rate will fill in automatically based on the Currency, but you can also edit the exchange from the field.



The screenshot shows a form with three input fields. The top field is a dropdown menu containing the text "2.250 USD". Below it is a text input field labeled "Amount" containing the value "2.250". The next field is a dropdown menu labeled "Currency" containing the value "USD" and a small yellow icon of a hand. The bottom field is a text input field labeled "Exchange Rate (currency / base currency)" containing the value "0.0856".

NOTE: The Currency types and Exchange Rates are set up in **Settings** under **Company >> Currency**.

POPULATING THE DATABASE

OVERVIEW OF ENTERING DATA

Before Proteus MMX can be used to issue work orders and print reports, certain data must first be entered into the system. Please follow our recommended sequence of data entry to minimize data entry time and maximize efficiency.

Based on your desired results, below is a recommended sequence of data entry. Your trainer can guide you to adopt this data entry sequence for your specific needs. Please note that some of the data can be entered via the use of the Import Utility (requires data in Excel, text or COBie format).

NOTE: This is an end-user process that assumes that initial administration tasks have been performed by the Proteus MMX System Administrator.

1. Gather Data
2. Enter Settings
 - Populate Drop-Down Lists
 - Set Company Non-Working Days
3. Enter Company Information
 - Update Company Name
 - Update Address Information
4. Enter Facilities
5. Enter Locations
6. Enter Customer Records
 - Add Customer Locations
7. Enter Cost Center Records
 - Create Cost Centers
 - Create Budgets
8. Enter Vendor Records
9. Enter Labor Craft Records
 - Add Labor Rates
10. Enter Employee Records
 - Add Employee
 - Set Non-Working Days
11. Enter Contractor Records
12. Enter Part Records

13. Enter Stockroom Records
 - Enter Quantity on Hand
 - Attach Vendors
14. Enter Bill of Material Records
 - Attach Parts
15. Enter Assets Records
 - Attach Bill of Materials
 - Associate Vendor
16. Enter Asset Systems
 - Attach Assets
17. Enter Tasks Records
 - Attach Labor Crafts
18. Enter Tools
19. Enter Work Order Master Records
 - Attach Assets, Tasks, and Parts as necessary
 - Schedule Work Orders as necessary
20. Enter Work Order Records
 - Attach Assets, Tasks, and Parts as necessary
21. Enter Purchasing Requisition Records
 - Assign Purchase Order Numbers
 - Attach Blanket Purchase Orders

NOTE: Keep in mind that Eagle Technology offers data collection and data entry services to assist in the gathering and entering of data. MMX's Import Utility can also be used to populate most modules.

SETTINGS

The **Settings** module houses most of the settings and customization involved in the set-up of Proteus MMX. For a listing of this module, please see below:

MODULE	SETTING	MODULE	SETTING
Alarms	Asset Current Runtime	Service Requests	Message Customization
	Building Automation Driver		Requesters
	Work Order Master Alarms		Service Request Numbers
Assets	Categories	Work Orders	Approvals
	Zero Fiscal Year Totals		Causes
Company	Audit Trail Settings		Inventory Check
	Countries		Maintenance Codes
	Currencies		Priorities
	Departments		Shifts
	Divisions		Work Order Status
	Non-Working Days		Work Order Number
	Regions		Work Types
	States		
General	Display Options		
	Home Page Options		
	Release Notes		
	Translations		
Inventory	Stock Classes		
	Transaction Reasons		
Purchasing	Accounts		
	Buyers		
	Payment Terms		
	Requesters		
	Receivers		
	Requisition Numbers		
	Shipping Addresses		
	Shipping Methods		

COMPANY INFORMATION

The **Company Information** module in the *Company* menu is used to store the basic company contact and address information. Proteus MMX will use this data in order to display the company's billing address on purchase orders. It is recommended to enter this information at the time of installation. However, this information can always be entered or revised later should any changes occur.

The screenshot shows a web form titled "Company Information" for "Eagle Technology, Inc. - Proteus MMX demo SaaS sites". The form contains the following fields:

- Company Name: Eagle Technology, Inc. - Proteus MMX demo SaaS sites
- Address 1: [Empty]
- Address 2: [Empty]
- City: Mequon
- Province or State: North Dakota (dropdown menu)
- Postal Code: 53225
- Country: United States
- Phone Number: +1 (262) 241-3845
- Fax Number: [Empty]
- Email Address: Sales@EagleCVMS.com
- Web Page: http://www.EagleCVMS.com/
- Company Logo: [Empty]

FACILITIES

The **Facilities** module in the *Company* menu is used to store the main facilities within your company. This could include your company headquarters as well as your manufacturing plant in another state. Proteus MMX will use this data in order to populate the Location Browsers. These facilities will be automatically populated into any tree listing in Proteus MMX. It is best to enter these locations at installation time.

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

Facility Name	Description	Address 1	Address 2	City	Province or State
A Pharma Company	This company has two sites, one in Florida and one in New Jersey				
BigTop Hotel	Main Hotel				
EHS					
Impac Waste Disposal	Waste Disposal Facility				
INSPER	Contrato 2935 Faculdade Inspere	Rua Quata 300			
IT					

LOCATIONS

The **Locations** module in the *Company* menu is used to store the basic company location information. This could include locations like floors, rooms, production areas, garages, etc. Proteus MMX will use this data in order to populate the Location Browsers. These locations will be automatically populated into any tree listing in Proteus MMX. The individual locations can also have specific data tied to it (Name, Address, Cost History, etc.). It is best to enter these locations at installation time. However, this information can always be entered or revised later, should any changes occur.

A default location can be set so that you are taken directly to that location whenever you access the *Location* module. You can also issue work orders against a location from this module.

Locations	Location Type	Description	Address 1	Address 2	City	Province or State	Country
<input type="checkbox"/> Eagle Technology, Inc. - Proteus MMX demo SaaS sites:	Company		11019 N. Towne Square Road		Mequon	Wisconsin	United States
Locations	Location Type	Description	Address 1	Address 2	City	Province or State	Country
<input type="checkbox"/> My Airport	Facility						
<input type="checkbox"/> My Resort Complex	Facility						
<input type="checkbox"/> My Factory Complex	Facility						
<input type="checkbox"/> My Shopping Malls	Facility						
<input type="checkbox"/> INSPER	Facility	Contrato 2935 Faculdade Inesper	Rua Quata 300				
<input type="checkbox"/> Life Cycle Facilities	Facility						

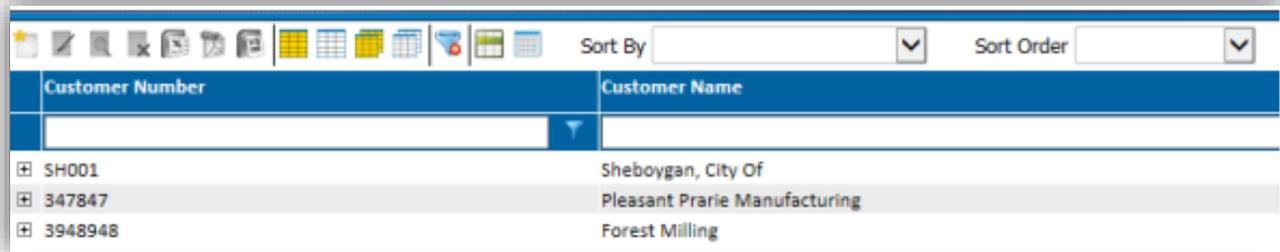
MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Issue a Work Order against a specific location.

CUSTOMERS

The **Customers** module in the *Company* menu is used to record and continually maintain all customer information and locations. Each customer can have many locations. For example, a maintenance company may handle all the needs for a major department store. They would have the department store set up as a customer and all of the individual retail locations (Store #, City, etc.) set up as customer locations.

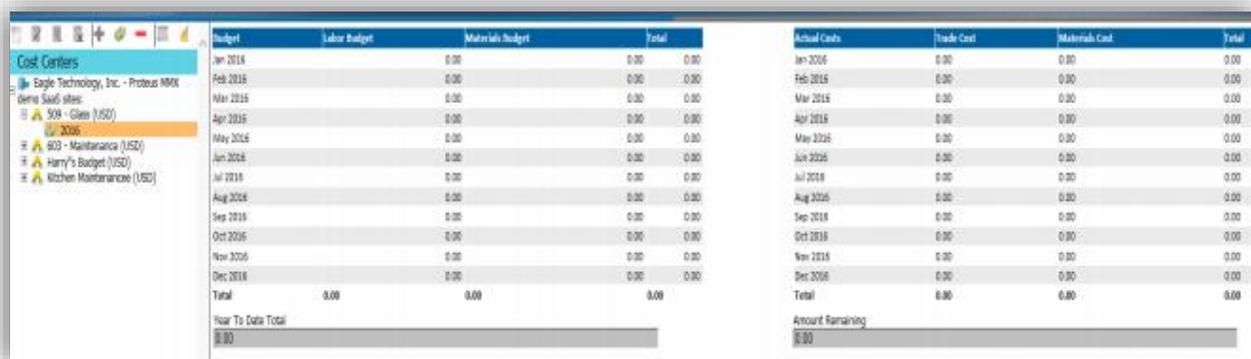


Customer Number	Customer Name
SH001	Sheboygan, City Of
347847	Pleasant Prarie Manufacturing
3948948	Forest Milling

COST CENTERS

The **Cost Centers** module in the *Company* menu is used to create, modify, and delete cost centers. The Cost Centers page is also used to set budgets for individual cost centers. Users must have the rights to the Cost Center module to use this feature.

The Cost Centers module allows authorized users to set a material budget and a labor budget amount for each month, per cost center. Labor costs are accumulated when a work order is closed. Material costs accumulate when a work order is closed, when a purchase order is closed, or when a transaction is performed.



	Budget	Labor Budget	Materials Budget	Total	Actual Costs	Trade Cost	Materials Cost	Total
Jan 2016	0.00		0.00	0.00	0.00		0.00	0.00
Feb 2016	0.00		0.00	0.00	0.00		0.00	0.00
Mar 2016	0.00		0.00	0.00	0.00		0.00	0.00
Apr 2016	0.00		0.00	0.00	0.00		0.00	0.00
May 2016	0.00		0.00	0.00	0.00		0.00	0.00
Jun 2016	0.00		0.00	0.00	0.00		0.00	0.00
Jul 2016	0.00		0.00	0.00	0.00		0.00	0.00
Aug 2016	0.00		0.00	0.00	0.00		0.00	0.00
Sep 2016	0.00		0.00	0.00	0.00		0.00	0.00
Oct 2016	0.00		0.00	0.00	0.00		0.00	0.00
Nov 2016	0.00		0.00	0.00	0.00		0.00	0.00
Dec 2016	0.00		0.00	0.00	0.00		0.00	0.00
Total		0.00	0.00	0.00		0.00	0.00	0.00
Year To Date Total								0.00
Amount Remaining								0.00

MAIN FUNCTIONS

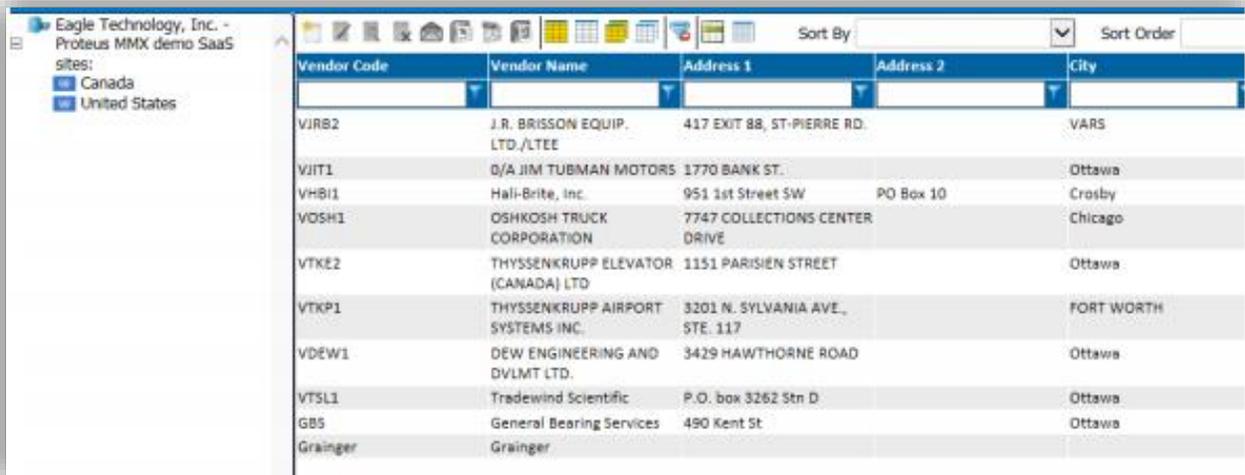
A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Add a new budget
	Adjust a budget
	Remove budget
	Change fiscal year start month
	Purge budget history

VENDORS

The **Vendor** module in the *Providers* menu 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* module, vendor records are able to analyze, plan, and manage the equipment maintenance and inventory operations.



Vendor Code	Vendor Name	Address 1	Address 2	City
VIRB2	J.R. BRISSON EQUIP. LTD./LTEE	417 EXIT 88, ST-PIERRE RD.		VARs
VJIT1	D/A JIM TUBMAN MOTORS	1770 BANK ST.		Ottawa
VHBI1	Hali-Brite, Inc.	951 1st Street SW	PO Box 10	Crosby
VOSH1	OSHKOSH TRUCK CORPORATION	7747 COLLECTIONS CENTER DRIVE		Chicago
VTKE2	THYSSENKRUPP ELEVATOR (CANADA) LTD	1151 PARISIEN STREET		Ottawa
VTKP1	THYSSENKRUPP AIRPORT SYSTEMS INC.	3201 N. SYLVANIA AVE., STE. 117		FORT WORTH
VDEW1	DEW ENGINEERING AND DVLMT LTD.	3429 HAWTHORNE ROAD		Ottawa
VTSL1	Tradewind Scientific	P.O. box 3262 Str D		Ottawa
GBS	General Bearing Services	490 Kent St		Ottawa
Grainger	Grainger			

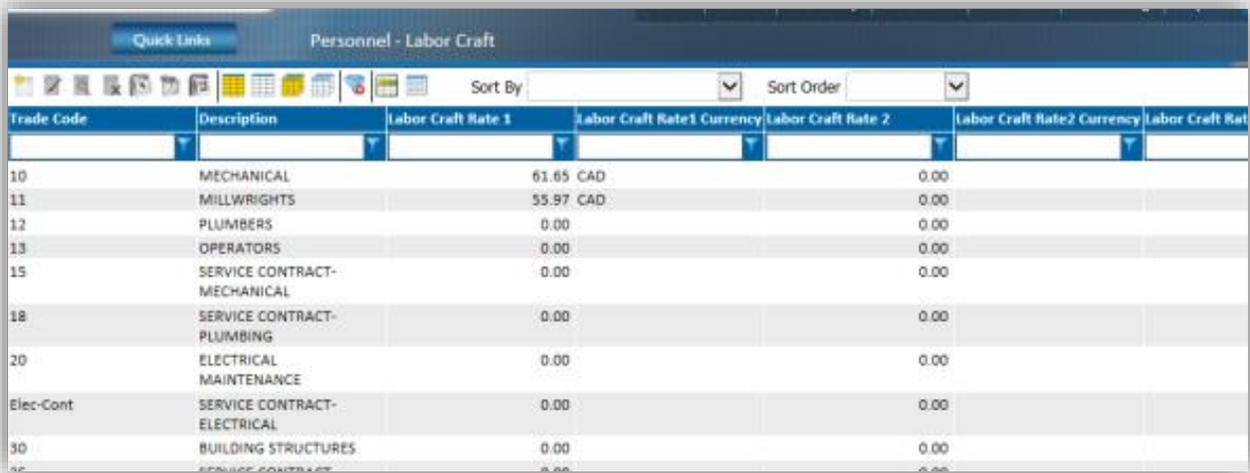
MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	E-mail Vendor

LABOR CRAFTS

The **Labor Crafts** module in the *Personnel* menu is used to record and continually maintain all personal labor crafts. These labor crafts are used for identifying and classifying maintenance personnel by a specific craft, skill level, or function. Through this module, labor crafts are also associated to employees.



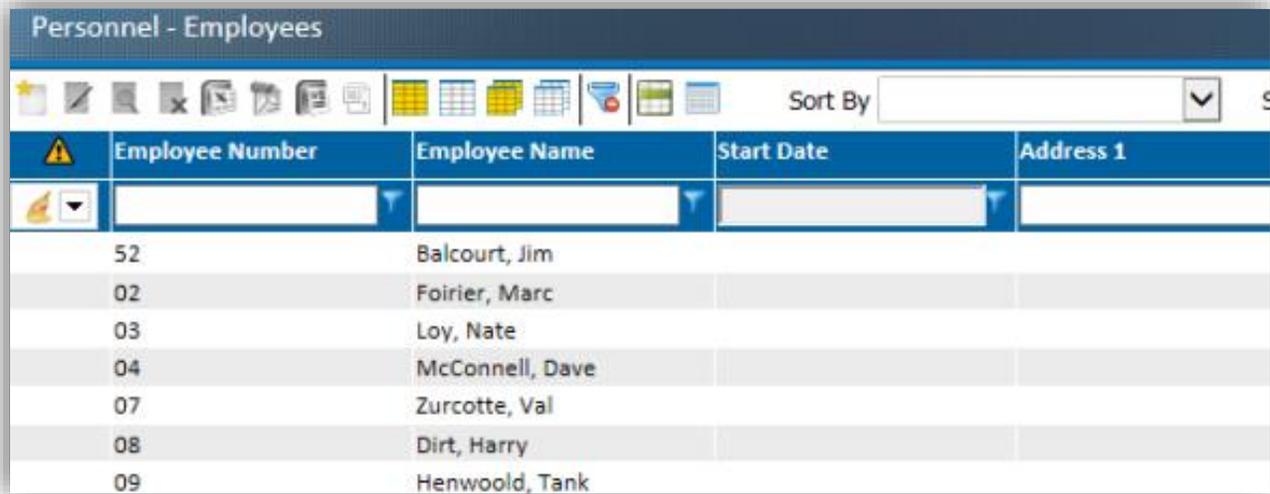
Trade Code	Description	Labor Craft Rate 1	Labor Craft Rate1 Currency	Labor Craft Rate 2	Labor Craft Rate2 Currency	Labor Craft Rate
10	MECHANICAL	61.65	CAD	0.00		
11	MILLWRIGHTS	55.97	CAD	0.00		
12	PLUMBERS	0.00		0.00		
13	OPERATORS	0.00		0.00		
15	SERVICE CONTRACT-MECHANICAL	0.00		0.00		
18	SERVICE CONTRACT-PLUMBING	0.00		0.00		
20	ELECTRICAL MAINTENANCE	0.00		0.00		
Elec-Cont	SERVICE CONTRACT-ELECTRICAL	0.00		0.00		
30	BUILDING STRUCTURES	0.00		0.00		
32	SERVICE CONTRACT	0.00		0.00		

The Labor Craft designates a single craft or skill level. Implement a numbering scheme that best meets the needs of the departments. For example:

MECH01	Mechanic, entry level
HVAC02	Heating/Air Conditioning Technician, expert
ELEC03	Electrician, supervisor
OC01	Outside Contractor

EMPLOYEES

The **Employees** module in the *Personnel* menu is used to record and continually maintain all personal employee information. Each employee that is to use Proteus MMX should have their information entered into this section. This module is also used to associate existing labor crafts to employees.

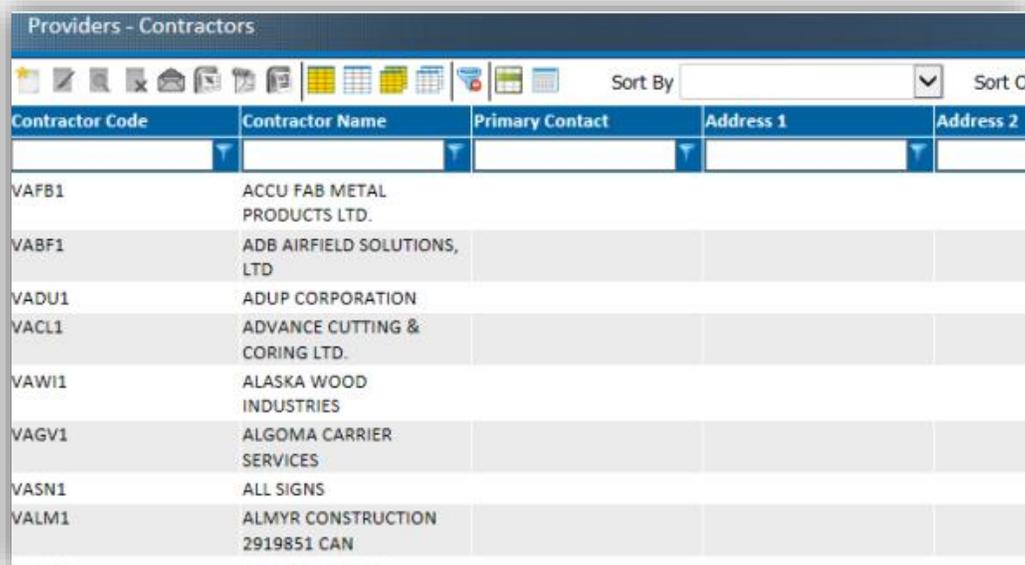


The screenshot shows the 'Personnel - Employees' window. It features a toolbar with various icons and a 'Sort By' dropdown menu. The main area contains a table with the following columns: Employee Number, Employee Name, Start Date, and Address 1. The table lists several employees with their respective IDs and names.

Employee Number	Employee Name	Start Date	Address 1
52	Balcourt, Jim		
02	Foirier, Marc		
03	Loy, Nate		
04	McConnell, Dave		
07	Zurcotte, Val		
08	Dirt, Harry		
09	Henwoold, Tank		

CONTRACTORS

The **Contractors** module in the *Providers* menu is used to record and continually maintain all information relevant to the 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.



The screenshot shows the 'Providers - Contractors' window. It features a toolbar with various icons and a 'Sort By' dropdown menu. The main area contains a table with the following columns: Contractor Code, Contractor Name, Primary Contact, Address 1, and Address 2. The table lists several contractors with their respective codes and names.

Contractor Code	Contractor Name	Primary Contact	Address 1	Address 2
VAFB1	ACCU FAB METAL PRODUCTS LTD.			
VABF1	ADB AIRFIELD SOLUTIONS, LTD			
VADU1	ADUP CORPORATION			
VACL1	ADVANCE CUTTING & CORING LTD.			
VAW11	ALASKA WOOD INDUSTRIES			
VAGV1	ALGOMA CARRIER SERVICES			
VASN1	ALL SIGNS			
VALM1	ALMYR CONSTRUCTION 2919851 CAN			

MAIN FUNCTIONS

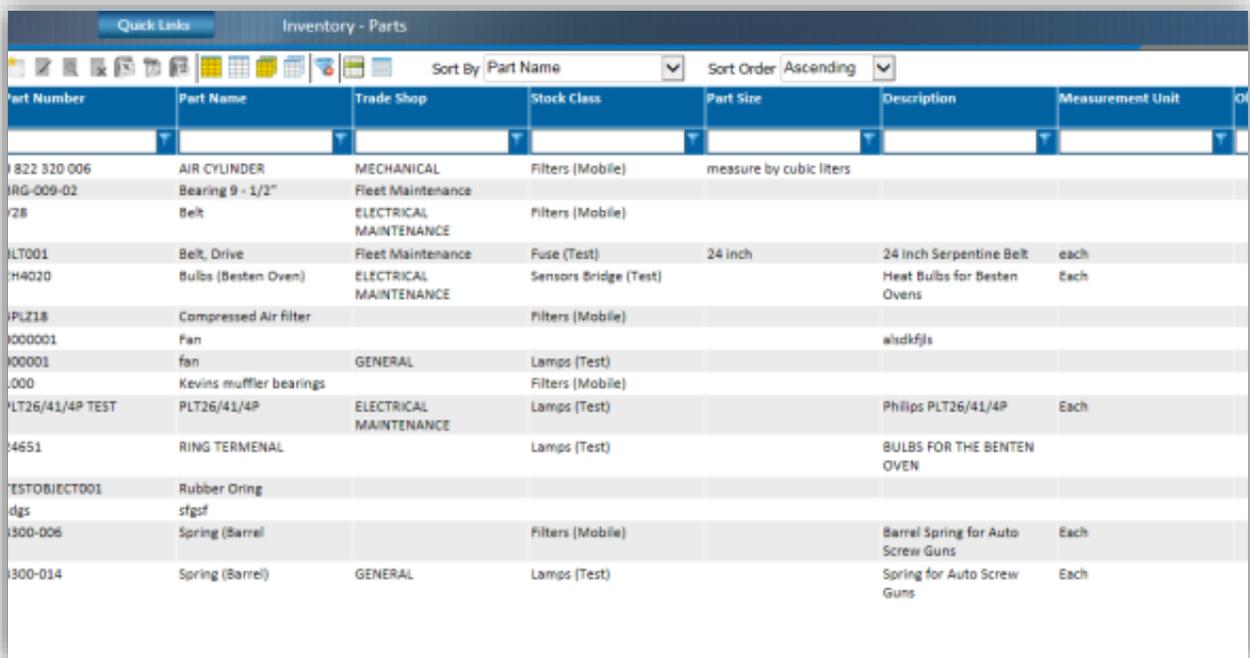
A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	E-mail Vendor

PARTS

The **Parts** module in the *Inventory* menu is used to record and continually maintain all parts within a company. The Parts is a complete spare parts and maintenance supplies management system, which is linked with many other modules in Proteus MMX.

Every part is identified by a unique part number.



Part Number	Part Name	Trade Shop	Stock Class	Part Size	Description	Measurement Unit
822 320 006	AIR CYLINDER	MECHANICAL	Filters (Mobile)	measure by cubic liters		
IRG-009-02	Bearing 9 - 1/2"	Fleet Maintenance				
28	Belt	ELECTRICAL MAINTENANCE	Filters (Mobile)			
LT001	Belt, Drive	Fleet Maintenance	Fuse (Test)	24 inch	24 inch Serpentine Belt	each
H4020	Bulbs (Besten Oven)	ELECTRICAL MAINTENANCE	Sensors Bridge (Test)		Heat Bulbs for Besten Ovens	Each
PLZ18	Compressed Air filter		Filters (Mobile)			
000001	Fan				alsdkfjs	
000001	fan	GENERAL	Lamps (Test)			
.000	Kevin's muffler bearings		Filters (Mobile)			
PLT26/41/4P TEST	PLT26/41/4P	ELECTRICAL MAINTENANCE	Lamps (Test)		Philips PLT26/41/4P	Each
4651	RING TERMENAL		Lamps (Test)		BULBS FOR THE BENTEN OVEN	
ESTOBJECT001	Rubber Oring					
dgsg	sfgsf					
300-006	Spring (Barrel)		Filters (Mobile)		Barrel Spring for Auto Screw Guns	Each
300-014	Spring (Barrel)	GENERAL	Lamps (Test)		Spring for Auto Screw Guns	Each

STOCKROOMS

The **Stockrooms** module in the *Inventory* menu is used to enter and display quantity details about a part. It is also used to conduct transactions (adjusting part quantities) and move tickets (moving parts between stockrooms).

The main screen of Stockrooms consists of two different areas:

- Location Browser
- Grid

The Location Browser displays all stockrooms by company location. Users can place stockrooms in certain physical locations. Users can then choose parts that exist in Parts Master and add them to one or many stockrooms.

Stockroom Name	Number Of Parts	Quantity On Hand	Quantity Allocated
0427	2	70	447
Central Stockroom	1	80	16
CSB 2nd Floor	0	0	0
Gratz	0	0	0
Maint E-4-6	4	13	0
PRESCOTT VALLEY	0	0	0
PV	0	0	0
전주공장 부품창고	0	0	0

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Remove part from stockroom
	Issue move ticket
	Perform transaction (add, subtract, replace)
	Scrap part
	Create a part kit (track time and material costs)
	Issue a repair order

BILL OF MATERIALS

The **Bill of Materials** module in the *Inventory* menu is used to create a bill of materials. A Bill of Materials (BOM) is a list of parts that can be associated to a specific asset. This can be an entire breakdown of every part within the asset or it may be a list of the most commonly replaced or serviced parts.



Bill Of Materials Name	Description	Number Of Parts	Assets Attached	UserField
aa	aa	0	1	
BOM-002		2	0	
BOM-003		4	0	
454545		1	0	

ASSETS

The **Assets** module in the *Assets* menu is used to record and continually maintain all assets within a company. Assets may include, but are not limited to the following:

- Fans
- Chillers
- Forklifts
- Building and Grounds
- Fleet Vehicles
- Renovation or Overhaul Projects

The user can update the current physical location and current operating status of the asset. Also, the user can associate a specific Bill of Materials to the asset.

Equipment Name	Asset Number	Serial Number	Asset Tag	Description	Date Inventory Taken
test	0001			Central GPE Juno Net com 4 laços	
V-Quip Valves on the PTB Apron	020200370		020200370	V-QUIP VALVES 8 INCH BUTTERFLY VALVES 21 VALVES PHASE II 16 (10 EAST & 2 WEST)	03/29/2007
STORMCEPTOR	020200394-1		020200394-1	STORMCEPTOR BY HANGAR 14	06/01/2004
Airport Catch Basins	020300020		020300020	Airport Catch Basins	05/31/2011
VORTECHS STORM WATER GRIT CHAM	020400246		020400246	VORTECH STORM WATER GRIT CHAMBER SYSTEM ON EAST APRON. MODEL PC1319. PURCHASED BY CONTECH STORMWATER SOLUTIONS	01/22/2008
OIL/WATER SEPARATOR	020400301		020400301	OIL/WATER SEPARATOR MANUFACTURER: AQUARIUS MODEL:	11/25/2003

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Change Location
	Change Status
	Issue work order

ASSET SYSTEMS

The **Asset Systems** module in the *Assets* menu is used to associate connected or related assets together. For example, an asset system could include sub-assemblies of a specific asset or machines that are part of a production line. The user can update the current operating status of the asset as well as issue a work order against the entire asset system.

The screenshot shows the 'Assets - Asset Systems' interface. On the left is a navigation pane with a tree view of sites under 'Eagle Technology, Inc. - Proteus MMX demo SaaS sites'. The main area displays a table of asset systems. The table has columns for 'Asset System Number', 'Asset System Name', and 'Description'. The data rows are as follows:

Asset System Number	Asset System Name	Description
1	xIDS	Tous les panneaux d'affichages de l'aéroport.
2	Xids-2	Airport 2020
AMBULance 1	Ambulance System 1	
FR-100	Furnace	
M360-01	Chamber 01	Freeze-dryer Chamber 01
OD-SITEBLDG	OVERHEAD DOORS SITE BUILDINGS	OVERHEAD DOORS SITE BUILDINGS
P1	Production Line 1	
소각로	ZA-001	

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Change Location
	Change Status
	Issue Work Order

TASKS

The **Tasks** module in the *Work Orders* menu is used to create specific maintenance tasks that are used in the completion of work orders and performed at regular intervals. A task allows a description, labor craft, and estimated time for completion (entered in hours) to be associated with it. Tasks can be generic, such as replace, inspect or calibrate. They can also be safety-related or machine-specific tasks.

Task Number	Trade Code	Estimated Hours	Description	UserField 1	Use
00100	30		0.00 FOREMAN TIME		
00200	10		1.00 SUPERVISION		
01000	10		1.00 VACATION LEAVE (USED)		
01050	1		0.00 LEAVES OF ALL KINDS		
03000	10		1.00 INJURY ON DUTY		
110D3	1		80.00 SYSTEM - 12 - OTHER MECHANICAL SYSTEMS SUB-SYSTEM - 0200 - CENTRAL DE-ICING		
110DM	1		1.00 SYSTEM - 12 - OTHER MECHANICAL SYSTEMS SUB-SYSTEM - 0200 - CENTRAL DE-ICING		
110DS	1		1.00 SYSTEM - 12 - OTHER MECHANICAL SYSTEMS		

Using a logical numbering scheme, tasks can be organized into groups by prefixes and suffixes like the following examples:

<u>Prefixes</u>		<u>Suffixes</u>	
INS	Inspection	000-999	Custodial
LUB	Lubrication	100-199	Electrical
SAF	Safety	200-299	Mechanical
VIB	Vibration	300-399	HVAC
CAL	Calibration	400-499	Facilities
CLN	Cleaning	500-599	Carpentry
FAB	Fabrication	600-699	Painting
FIR	Fire Systems	700-799	Plumbing
LOP	Lock out/Tag Out Procedure	800-899	Bldg/Grounds
ADJ	Adjust	900-999	Welding
CHG	Change	TST	Test

Tasks can also be assigned a labor craft, which will determine which employees can perform a task. Tasks can also be assigned a number designating the estimated hours to complete the task. This is used in scheduling labor on a work order.

TOOLS

The **Tools** module in the *Inventory* menu is used to record and continually maintain all tools within a company. The Tools is a complete tool management system, which is linked with many other modules in Proteus MMX.

The main screen of Tools consists of two different areas:

- Location Browser
- Grid

The Location Browser displays all tool cribs by company location. Users can place tool cribs in certain physical locations. Users can then add or remove tools to/from the tool crib.

Tool Number	Tool Name	Description	Serial Number	Tool Size	Manufacturer
asset	asset				
1414	1414				
4555	455				
14414	1414				
2404	April Tool 24				
temptool01	temptool01				
Tool 2	two				
TK1	TK1	TK1	TK1		
Bar Code Crib SA 01	2	0			
Tool Kit Crib SA 02	2	0		212.000 USD	
tool	2	1			
tool crib	3	0			
Tool Crib Name	2	0			

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Check In/ Check Out
	Scrap

WORK ORDER MASTERS

The **Work Order Masters** module in the *Work Order* menu is used to create, delete, schedule or activate a work order master. The Work Order Masters module is used to define maintenance jobs and procedures that are routinely completed, but not currently scheduled. An example of this type of work order may be machine setup. It is a job which follows the same procedures every time, but still falls under the category of demand maintenance, because one cannot anticipate when the need will arise.

The Work Order Masters module is instrumental in the creation of Preventive and Demand maintenance work orders. When a work order master is activated by a user, it becomes a demand maintenance work order and will be listed in the Work Orders module. When a work order master is used with a schedule, it becomes a preventive maintenance work order and will be listed in the Work Orders module.

NOTE: A Work Order number is automatically assigned when a work order master is activated or a Work Order is created. The Work Order number will not be displayed in Work Order Masters. The Work Order number will be displayed in the Work Orders module.

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Print
	Activate

WORK ORDER MASTER MULTI-CYCLE SCHEDULING

A PM work order can be scheduled according to a date schedule or a runtime schedule. To schedule a work order according to a date schedule (every week, every second Tuesday, twice a year, etc.), click on the **(+) symbol** next a Work Order Master.

The screenshot shows a web interface titled "Schedules" with a sub-header "J-WA-MT". It features three tabs: "Details", "Cycles", and "Preview". Below these are four sub-tabs: "Daily", "Weekly", "Monthly", "Yearly", and "Runtime", with "Monthly" selected. The interface includes a "Schedule Initiation Date" field set to "06/01/2018" and a "Description" field. The "Every" section has a text input "1" followed by "month(s)". Below this, there are radio buttons for "on" and "on same". The "on" option is selected and has a text input "1" followed by "Day". Underneath are checkboxes for "1st", "2nd", "3rd", "4th", and "Last". The "on same" option has checkboxes for "Sun", "Mon", "Tue", "Wed", "Thu", "Fri", and "Sat". The "Due" section has radio buttons for "on next" and "in". The "on next" option is selected and has a "Calendar" dropdown menu followed by "day(s)". The "in" option has a text input "0".

Any combination of cycles can be established for a single work order. When a work order reaches its activation date for a cycle (based on the Next Occurrence), it will become active. This is referred to as **Multi-Cycle** scheduling.

Parts, Labor, and Tasks can be assigned to a specific cycle or all cycles. Only the items assigned to a specific cycle will appear when the work order becomes active.

WORK ORDERS

The **Work Orders** module in the *Work Orders* menu is used to plan, create, and record maintenance jobs and procedures in response to maintenance service requests, emergency breakdowns, or other non-routine maintenance activities. Each work order contains a variety of information, such as who requested the job, the estimated down time of the equipment, the reason or problem, and the date by which the job should be completed.

NOTE: In addition to Work Orders created here, all activated Work Order Masters will also show up in the Active Work Order Grid. These Work Order Masters can either be force-activated or activated by means of a schedule.

Employee	Contractor	Target									
Work Order Number	Priority Name	Asset Name	Job Number	Work Order Status	Requester Full Name	Task Progress	Work Type Name	Work Order Status	Work Started		
201806	High	inzerotech		DemandMaintenance	Siddique Ahmad Khan	1	Breakdown Maintenance	Approved	06/11/2018		
20180608004		Exhaust Fan 02		DemandMaintenance		1			02/01/2018		
20180608003		Boiler	UM10117-Tech Center-ENG-Boilers (Quarterly)	PreventiveMaintenance		0	UMB DAY ENGINEERS		06/08/2018		
20180608002		Boiler	UM10117-Tech Center-ENG-Boilers (Quarterly)	PreventiveMaintenance		0	UMB DAY ENGINEERS		06/08/2018		
20180608001		Boiler	UM10117-Tech Center-ENG-Boilers (Quarterly)	PreventiveMaintenance		0	UMB DAY ENGINEERS		06/08/2018		
20180607001	High	Bar Code 101	WOT	PreventiveMaintenance		0	Breakdown Maintenance		06/07/2018		
20180604203		Asset 31211	YRC-001-A-GRND-Grounds Inspection (Weekly)	PreventiveMaintenance		0	GROUNDS		06/04/2018		
20180604202			DTWSBPPROD-100119-ENG-Underfloor Variable Air Volume (Annual)	PreventiveMaintenance		0	DAY ENGINEERS		06/04/2018		
20180604201		Variable Air Volume 117	DTWSBPPROD-100119-ENG-Underfloor Variable Air Volume (Annual)	PreventiveMaintenance		0	DAY ENGINEERS		06/04/2018		
20180604200		Variable Air Volume 116	DTWSBPPROD-100119-ENG-Underfloor Variable Air Volume (Annual)	PreventiveMaintenance		0	DAY ENGINEERS		06/04/2018		

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Print
	E-mail
	Complete and Close Work Order
	Cancel Work Order

TIME CARD

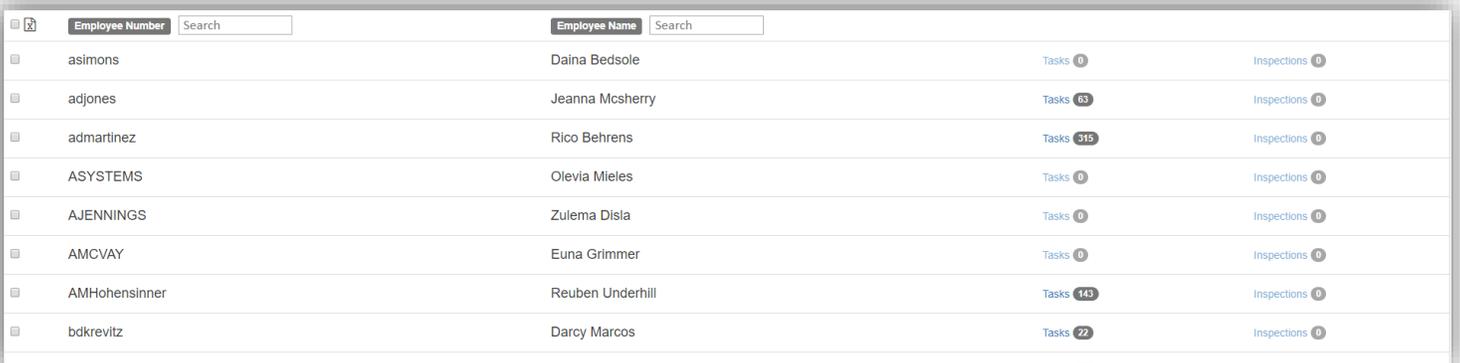
The **Time Card** module in the *Work Orders* menu is used to display all work orders to which an employee is assigned. When Work Orders are active and an employee has been assigned to labor on the work order, they will be listed here. The user can select an employee and update all hours worked and pertinent dates for the selected employee in one simple location.

The Grid displays a listing of the employee and their assigned work orders. When a specific employee is expanded, a details grid appears on the screen and lists the work orders to which that employee is assigned. The fields listed in the Grid are:

- Employee Name
- Employee Number

The fields listed in the Details Grid are:

- Work Order Number
- Job Number
- Task Number
- Hours at Rate 1
- Hours at Rate 2
- Hours at Rate 3
- Hours at Rate 4
- Hours at Rate 5
- Start Date
- Completion Date



Employee Number	Employee Name	Tasks	Inspections
asimons	Daina Bedsole	0	0
adjones	Jeanna Mcsherry	63	0
admartinez	Rico Behrens	315	0
ASYSTEMS	Olevia Miele	0	0
AJENNINGS	Zulema Disla	0	0
AMCVAY	Euna Grimmer	0	0
AMHohensinner	Reuben Underhill	143	0
bdkrevitz	Darcy Marcos	22	0

BLANKET PURCHASE ORDERS

The **Blanket Purchase Order** module in the *Purchasing* menu is used to display all Blanket Purchase Orders. A Blanket Purchase order is a standing order for a predetermined amount and/or predetermined time period with a vendor. Creating blanket purchase orders will reduce the amount of paperwork required to place an order, since multiple purchase orders will not have to be written out every time an order is placed.

The fields listed in the Grid are:

- Blanket Purchase Order Number
- Blanket Purchase Order Name
- Vendor Code
- Vendor Name
- Last Requisition Date
- Agreement Amount
- Expiration Date
- Amount Remaining

 Sort By <input type="text"/> Sort Order <input type="text"/>						
		Blanket Purchase Order Number	Blanket Purchase Order Name	Vendor Code	Vendor Name	Expiration Date
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
		122(4TT01	122	4TT01	4T Total Lawn Inc.	
		1223	123	4M-CLEANING	4M CLEANING	01/02/2018
		InZero 2015	Blanket PO	4M-CLEANING	4M CLEANING	04/10/2018
		InZero 2015-01	Blanket PO	111	11	07/21/2017
		BPO-01	Blanket Purchase Order - CDG	VCCDG-01	Vendor Chandigarh	09/30/2017
		Blanket Purchase -001	tiffin hr	VEN02	Venmar CES Inc.	12/27/2017

REQUISITIONS

The **Requisitions** module in the *Purchasing* menu is used to create, delete, or edit requisitions for parts and assets. Once a requisition is created, it can be issued a Purchase Order Number, thus making it a purchase order.

The Grid displays a listing of the current requisitions. The fields listed in the Grid are:

- Requisition Number
- Requisition Date
- Promise Date
- Vendor Code
- Vendor Name
- Cost Center
- Account Number
- Requester
- Buyer
- Grand Total

Requisition Number	Requisition Date	Promise Date	Vendor Code	Vendor Name	Cost Center	Account Number
20170314001	03/14/2017		FLD-Ven-02	Florida vendor 2	Inspection Cost	
20170314002	03/14/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170314003	03/14/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170314005	03/14/2017	03/14/2017	Vendor 01	Vendor 01	South Cost Center 1	
20170314007	03/14/2017	03/14/2017	Vendor 01	Vendor 01	South Cost Center 1	
20170314008	03/14/2017		Vendor 01	Vendor 01	South Cost Center 1	
20170314009	03/14/2017	03/14/2017	Vendor 01	Vendor 01	South Cost Center 1	HDFC
20170314011	03/14/2017		Vendor 01	Vendor 01	South Cost Center 1	
20170314015	03/14/2017		Vendor 01	Vendor 01	South Cost Center 1	
20170314016	03/14/2017		Vendor 01	Vendor 01	South Cost Center 1	
20170315001	03/15/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170315002	03/15/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170315005	03/15/2017	03/15/2017	Vendor 01	Vendor 01	hapur cost center	HDFC
20170315007	03/15/2017		4M-CLEANING	4M CLEANING	hapur cost center	
20170315011	03/15/2017		4M-CLEANING	4M CLEANING		

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Print
	E-mail
	Assign Purchase Order Number

PURCHASE ORDERS

The **Purchase Order** module is used for viewing purchase requisitions that have been given a Purchase Order Number, and are therefore ready to be sent to a Vendor and have the parts or assets received once they are shipped. Once all the parts or assets are received, you are able to close the purchase order out from here.

If any changes need to be made to an existing purchase order, you can also **Amend** the purchase order from the *Purchase Order* module (if you have sufficient rights).

		Sort By	Sort Order			
		Purchase Order Number	Purchase Order Status	Purchase Order Date	Requisition Number	Requisition Date
		77	77	03/31/2017	20170331002	03/31/2017
		642017	642017		20170406033	04/06/2017
		PO-07082017				08/08/2017
		PO-012	Approved		20170918001	09/18/2017
		PO-19-01			20170919001	09/19/2017
		PO-19-03			20170919003	09/18/2017
		Po-20-1			20170919009	09/20/2017
		SO-0909-834054645		09/21/2017	20170921006	09/21/2017
		SO-02 po-844070801		09/21/2017	20170921008	09/21/2017
		SO-123-p0-834010002		09/25/2017	20170924005	09/25/2017

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Print
	E-mail
	Amend Purchase Order
	Close Purchase Order
	Cancel Purchase Order

RECEIVING

The **Receiving** module in the *Purchase Orders* menu is used to receive all parts and assets. When Purchase Orders are received, the quantities and part/asset data will be updated in a specific area.

The main fields listed in the Grid are:

- Part
- Quantity Received
- Received Date
- Receiver

Purchase Order 20170919001

Details Parts Assets Costs Shipping Billing Amendments Email Attachments **Receiving/Update Tracking Information**

Parts Non-Stockroom Parts Assets

Sort By Sort Order

Part Number	Part Name	Quantity Ordered	Quantity Received	Total Quantity Received	Balance Due	Received Date	Receiver
CDG-10	Bottle-CDG-10	10	10	10	0	09/19/2017	Her...
123456789	Proteus Part Number	40	0	0	39	02/14/2018	Jim...
123456789	Proteus Part Number	40	0	0	38	02/14/2018	Her...
123456789	Proteus Part Number	40	0	0	37	02/14/2018	Davi...
123456789	Proteus Part Number	40	0	0	36	02/14/2018	Her...
123456789	Proteus Part Number	40	0	0	35	02/14/2018	Mor...
123456789	Proteus Part Number	40	0	0	34	02/14/2018	Jim...
123456789	Proteus Part Number	40	0	0	33	02/14/2018	Jim...
123456789	Proteus Part Number	40	0	0	32	02/14/2018	Her...
123456789	Proteus Part Number	40	1	1	30	02/14/2018	Jim...
123456789	Proteus Part Number	40	0	1	29	02/14/2018	Was...

MAIN FUNCTIONS

A listing of all page-specific functions is presented below:

ICON	DESCRIPTION
	Receive
	Update Tracking Information

REORDER LIST

The **Reorder List** module in the *Purchasing* menu is used to display all Reorder List information. The parts displayed on this list have fallen below their Reorder Point (which is set in each stockroom, on each part). If the parts appear on this list, the user can create a requisition for the part(s). Multiple parts can be selected and issued on the same requisition, assuming they are from the same vendor.

The fields listed in the Grid are:

- Vendor Code
- Vendor Name
- Stockroom
- Part Number
- Part Name
- Category
- Stock Class
- Size
- Measurement Units
- Manufacturer
- Manufacturer Part Number

Sort By <input type="text" value="Quantity Ordered"/> Sort Order <input type="text" value="Descending"/>						
	Vendor Code	Vendor Name	Stockroom	Part Number	Part Name	Part Size
	1001-vendor(Tamil)	vendor-tamil	UP-02-Stockroom-Facility	UP-102	Gear Part	Part Size 2
	&&FLD-Ven-01&&	&&&Florida vendor 1&&	Stockroom 47-patrick	46-patrick	john patrick	88
	&&FLD-Ven-01&&	&&&Florida vendor 1&&	Store - FLD-02	FLD-01	Gear Part -FLD-01	30
	001-zira vendor	zira vendor	zira stockroom	zira part	zira part	
	1001-vendor(Tamil)	vendor-tamil	only checking	03/CDG	03/CDG	
	1004-Vendor(Tamil)	vendor(tamil)	only checking	03/CDG	03/CDG	
	1001-vendor(Tamil)	vendor-tamil	stockrrom reorder checking	1002-reorder part	reorder part	
	1001-vendor(Tamil)	vendor-tamil	only checking	zira part	zira part	
	1001-vendor(Tamil)	vendor-tamil	003-up(Stockroom)	1014(up) part charger	1014(up) part	Part Size 1
	001	Proteus	test reorder	001 -PART nunber machine ledger.asset ledger	001 -PART name machine ledger.	99
	VCCDG-01	Vendor Chandigarh	Extra-CDG-B	CDG-1814	Acer-CDG-1814	10
	vendor 234	Vendor 234	New 1- CDG	CDG-10	Bottle-CDG-10	
	VCCDG-01	Vendor Chandigarh	CDG-Reorder-Store 2	CDG-1801	Gear-CDG-1801	2
	VCCDG-02	Vendor Punjab	CDG-Reorder-Store 2	CDG-1801	Gear-CDG-1801	2

RIGHTS (USERS/ROLES)

OVERVIEW OF RIGHTS

The **Rights** module allows the database administrator to add user to the Proteus MMX database, modify user rights, and change global program settings. The database administrator will apply the rights to a group and then add user to the group (or vice versa). The **Rights** are divided into two modules, *Users* and *Roles*. Together, these modules control access and account rights over every facet of Proteus MMX.

OPENING RIGHTS

Only employees that have been given access to the **Rights** module will be able use the module. The database administrator controls all aspects of Proteus MMX and will provide all employees with the proper rights.

The **Rights** are divided into two modules, *Users* and *Roles*. *Users* allows the creation of new usernames, editing of passwords, approvals, and the ability to edit the roles to which a user belongs. *Roles* are used to create roles as well as to configure the actual permissions and rights settings for all roles.

USERS

The **Users** module allows the database administrator to oversee every account-related facet of Proteus MMX. Users are able to be created and deleted from this view. Also, the database administrator will be able to edit a user's password as well as the role(s) to which he or she belongs.

The fields listed in the Grid are:

- User Name
- Employee Name
- Approval Level
- Last Login Date
- Phone Number
- Email Address

User Name	Last Login Date	Employee Name	Approval Level	Phone Number	Email Address
4aacardona	04/03/2017	Phylliss Greenblatt	4	(816) 564-7172	
adjones	03/14/2018	Jeanna Mcsherry	1	(816) 289-9781	
ad-martinez	05/03/2018	Rico Behrens	1	(816) 564-2830	
Administrator	06/12/2018	Dianna Rusher	5	(816) 564-3959	
ajuarez	12/01/2017		0		
bhorsman	02/28/2017	Dori Wegener	1	(816) 812-5527	
bjcumings	02/28/2017	Max Nygren	1	(816) 564-2827	NicholasS@eaglecmms.com
blowens	12/27/2016	Thaddeus Voisin	1	(816) 365-0134	
bmburdick	02/28/2017		0		
calaubach	08/09/2017	Amee Townson	1	(816) 678-2164	
Cali-01	01/25/2018	California-01	0		
camonaco	11/29/2016	Margene Fay	1	(816) 843-1051	
cbeasley	10/26/2015	Demetrius Debus	0		
cbush	02/27/2017	Lee Lant	0		
ccgroup	02/27/2017	Jefferson Jester	0	(913) 530-7539	
ccswetnam	12/03/2015	Letitia Divers	1	(816) 843-5555	
CDG1	05/25/2018	zahid-CDG-01	0	+7 (8) 9 x4	zahidi@inzerotech.com
CDG2	10/31/2017	lqbal-CDG-02	0	+9 (6) 5 x8	nazisha@inzerotech.com
CDG3	11/22/2017	Manish-CDG-03	0	+3 (4) 5 x6	zahidiqbal306@gmail.com

USERS DETAILS/ROLES

The **Users Details** screen consists of fields directly related to the user's account. These fields are:

- User Name
- Password
- Confirm Password
- Employee Name
- Approval Level

The *User Details* screen also has a role membership section that allows one or many roles to be associated to the current user account. Once a user role is associated to a user account, he or she will become a member of this role and inherit all rights of the role.

NOTE: Users that belong to no groups will have no access to the Proteus MMX software package.

Details	Roles	Mobile
User Name	cbeasley	Employee Name
Password	*****	Demetrius Debus
Confirm Password	*****	Days until password expires
Active Directory	<input type="checkbox"/>	Approval Level
		INSP/Cal User
		<input type="checkbox"/>

ROLES

The **Roles** module allows the database administrator to oversee every role-related facet of Proteus MMX. User roles are able to be created and deleted from this module. Also, the database administrator will be able to assign users to role as well as set various access, function, and field rights.

The fields listed in the Grid are:

- Role Name
- Description

Role Name	Description
CDG1	
CDG1	Chandigarh
CDG11	Chandigarh
CDG1122	Chandigarh

RIGHTS TAB

The ***Rights Tab*** consists of a Location Browser, as well as separate pane to control various access rights in Proteus MMX. The main types of rights that are controlled in this section are Access Rights, Function Rights, and Field Rights.

The drop-down in the Location Browser controls the Module rights. At the highest parent node of each module, the user can either choose to assign:

- View
- Change
- None

These rights will inherently be carried throughout the module.

The user can filter through the modules to be more precise in assigning rights. Depending on which node is checked, field level, and function rights will appear on the right side of the screen. These rights can be set by using the drop-down. At the top of the screen, the toolbar buttons may appear if applicable. To toggle the rights of these buttons, simply click on them.

The database administrator has three (3) choices regarding rights access to module in Proteus MMX. The three levels of rights present in Proteus MMX are:

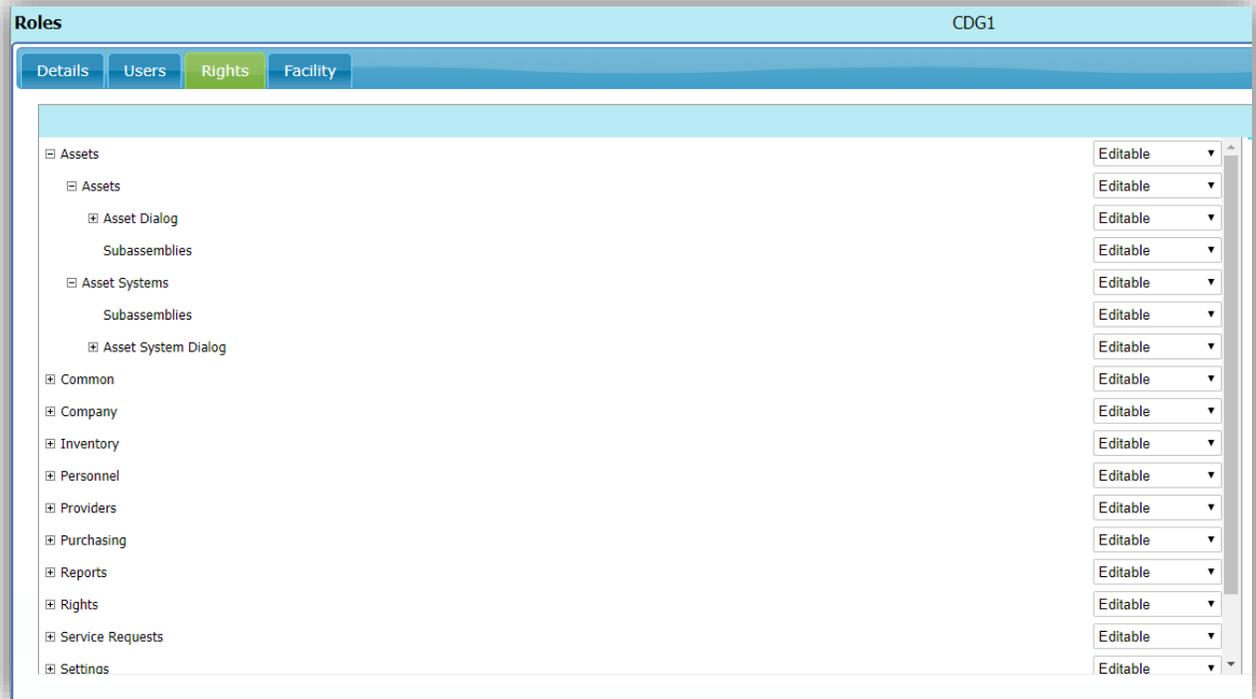
- **VIEW:** The users/group has permission to only view existing records.
- **MODIFY:** The group has permission to create new records as well as view and modify existing records.
- **NONE:** The group is denied access to the specific module entirely.

Function rights differ from module to module and can be selected in various combinations.

NOTE: If the access rights are set to VIEW or NONE, all function rights will be disabled for that module.

Field rights differ from module to module and can be selected in various combinations. If the box is checked, the group will have access to the field

NOTE: Field rights are controlled by the administrator only within that specific module that they exist.



REPORTS

The **Reports** module is used to print any one of many pre-formatted reports shipped with Proteus MMX. These reports contain helpful information such as equipment downtime, cost history, and labor costs. The information is obtained from the Proteus MMX database tables.

Asset Location				06/12/2018
Facility	Main			
Asset Number	Asset Name	Manufacturer	Location	
Hammer	Hammer			
Facility	DTTH-Thayer			
Asset Number	Asset Name	Manufacturer	Location	
DTTH-88242730-DWH-100	Domestic Water Heater	AO Smith	DTTH -	
DTTH-88242730-FPB-12	Fan Power Box		DTTH -	
DTTH-88242730-VAV-101	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-102	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-103	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-104	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-105	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-106	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-107	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-108	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-109	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-110	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-111	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-113	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-114	Variable Air Volume		DTTH -	
DTTH-88242730-VAV-1	Variable Air Volume		DTTH -	