



PROTEUS MMX TRAINING MANUAL –
GENERAL NAVIGATION

EAGLE TECHNOLOGY, INC.



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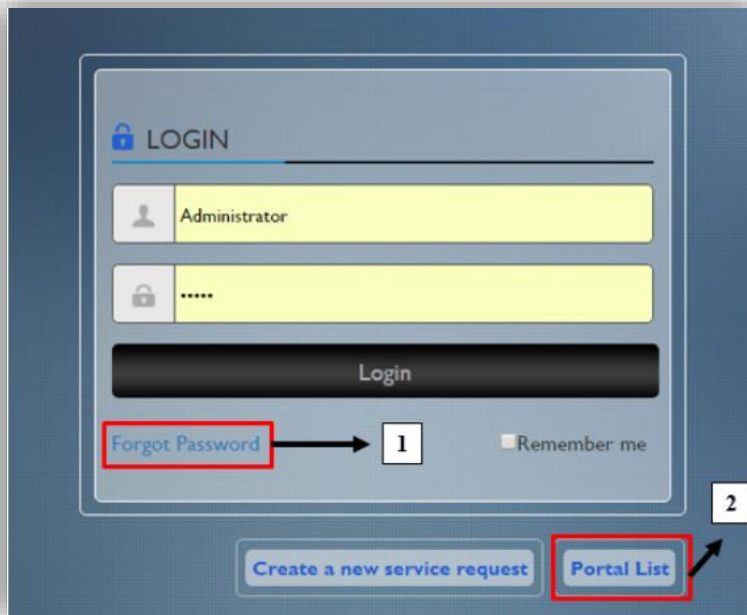
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GENERAL NAVIGATION

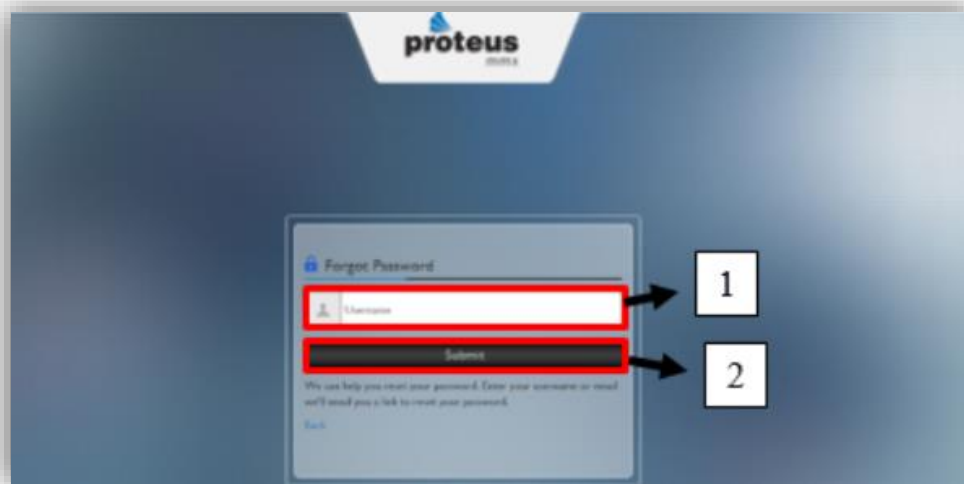
1. LOGGING IN

Log in using the User ID and password provided to you by your administrator (or Eagle).



If you forgot your password, you have the option to change your password using the ***Forgot Password*** function, seen above. [1]

You can access a different portal without logging into the system. You can do this by clicking on the ***Portal List*** icon on the login screen. [2]



Once prompted, you will be led to the **Forgot Password** screen. You'll be instructed to enter your username or the email used to register the account **(1)**. When you click submit, a link will be sent to your email, where you can recover your account **(2)**.

2. MMX DASHBOARD

After logging in, the Proteus MMX dashboard will display. The administrator dashboard is pictured below. Worker views can vary based on specific rights assigned to specific users or roles. Remember that **all field names** can be customized. The graphics on the dashboard are dynamic. For example, if a specific employee or contractor is selected, the graphic will update to reflect their work status.



Select the arrow to the right of the screen to bring up additional information, such as Message Board and My Work Orders. The Message Board allows you to send messages to other users of Proteus MMX. My Work Orders will show all active work orders assigned to the person logged into Proteus MMX.



3. ICON REVIEW
























Proteus MMX uses many icons for functions which should be easily recognizable in the MMX toolbar. Hover your cursor over the icon to display the icon name.



From left to right:

	Create New
	Copy (where applicable such as copying the selected asset)
	Edit the selected record
	View a record that is selected
	Delete the selected record (based on authority to do so)
	Change location – move an asset
	Change the status of the selected asset (in toolbar)/ Asset is out of service (in filter bar and rows in grid)
	Create a work order on the selected record (in toolbar)/ In-maintenance status (in filter bar and rows in the grid)
	Export records. The selected records can be exported to Excel, Word or PDF format
	Select all records on this page and clear selection
	Select all records in the whole file and clear selection
	Selecting this icon will allow the individual user based on their login to order which fields they see and the sequence of the fields in the display. Again, user rights will affect which of the icons are available based on the user's log-in.
	Will allow the user to widen columns for display purposes

4. ADDITIONAL ICONS

	Create a Purchase Order
	Print the selected record
	Email the selected record
	Approve the selected work request
	Decline a service request
	Filter Bar special column negative status (for example, filter for work orders not completed)
	Work Order Completed (in the filter bar and grid)
	Activate Work Order
	Clear the field
	Amend a purchase order
	Close a purchase order
	Cancel a purchase order
	Issue Move Ticket
	Perform Transaction (Stockroom)
	Scrap
	Create Kit
	Issue Repair Order
	Approve work order (See: <i>Approvals</i>)
	Critical Part
	Clear All Filter
	Update Location Hierarchy
	Image Upload Icon
	Machine History Icon

NOTE: Attachments and notes can be added to most items in the system.

5. 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
10. Enter Employee Records
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 Asset Records
 - Attach Bill of Materials
 - Associate Vendor

16. Enter Asset Systems
 - Attach Assets
17. Enter Task 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 Templates can also be used to populate most tabs.

6. NAMING ASSETS

Eagle Technology has designed a nomenclature which considers the need to analyze data from closed work orders. Identifying the Distribution Center, the floor, the type of equipment and a unique number for each asset.

Asset Number	016-AHU-AHU-08
Asset Name	AHU-08
Description	VAULT AIR HANDLER
Asset Tag	016-10491

Example

If you have questions about the nomenclature of asset ID's, speak to your Supervisor. A solid naming structure allows for the future addition and deletion of equipment, analysis of data, and consistency in processes.

7. CREATING, COPYING, MODIFYING AND SAVING RECORDS

RECORDS

Records, stored in database tables, 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 Type Search and Filter Row. It is 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 parts are duplicates, because one user entered **AH 100**, while the other user entered **AH-100**.

CREATING RECORDS

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

Functional Area	Pages
Assets	Assets, Asset Systems
Inventory	Parts, Stockrooms, Bill of Materials, Tools
Personnel	Employees, Labor Crafts
Providers	Contractors, Vendors
Purchasing	Requisitions, Purchase Orders, Blanket 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 page in which to add a new record.
2. Select the **New** icon in the Record Navigator. Depending on the current page, the user will see either a pop-up or the user will be brought to the Details screen. All tabs will be displayed and the user may enter data for the new record. When moving among fields during the data entry process, the user may use the **Tab** key, rather than the **Enter** key.

Note: Typically, the Number and Name fields (e.g. Asset Number and Asset Name) are required fields that need to be populated before you can save a record.

COPYING RECORDS

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

To copy records:

1. Select a menu and open the page in which to copy a new record.
2. Select a record that you wish to copy from the Record Navigator and select the **Copy** icon.
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 per 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 page 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 page in which to modify a record.
2. Select a record that you wish to modify from the Record Navigator.
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 per the currently sorted column.

DELETING RECORDS

The deletion of records in Proteus MMX can be completed quickly through the Record Navigator. 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 page in which to delete a record.
2. Select a record from the Record Navigator.
3. Select **Delete** icon.
4. If an error message is displayed upon an 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 masters if it is currently associated with a Work Order. Please contact the System Administrator for more information.

SELECTING MULTIPLE RECORDS

To select multiple records in a grid, you can use the **Ctrl** and **Shift** keys in a similar manner as Windows Explorer. Keep the **Ctrl** key pressed, and select multiple records to select them. Or, highlight a record, press the **Shift** key and select another record to select all records between the two.

8. USING LISTS

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

For example, in **Work Order Master**, we have lists for **Assets, Tasks, and Part**. The user can compile a listing of all assets, tasks, and parts that are associated with that specific Work Order Master.

Note: Certain lists are read-only, and thus, the user cannot add or remove from them.

ADDING ITEMS TO A LIST:

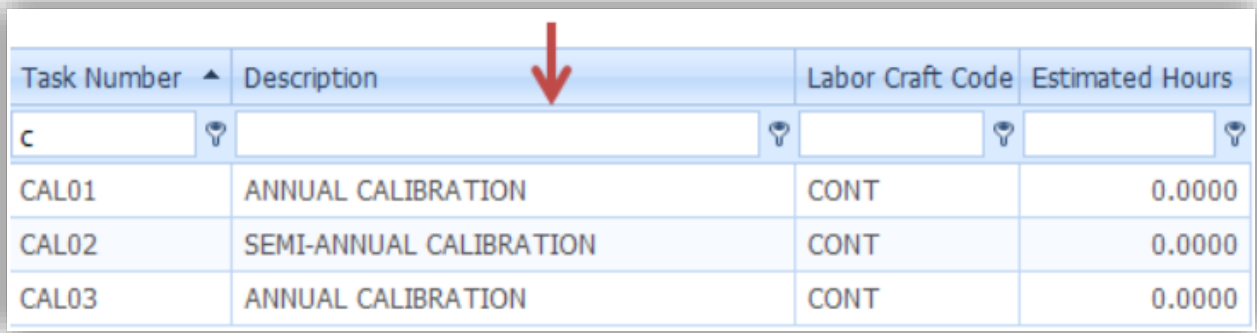
1. Select the **Add** icon.
2. Select a record from the pop-up.
3. Fill in all data/ required fields.
4. Confirm your selection.
5. The record will now be added to the list.

REMOVING ITEMS FROM A LIST:

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

9. QUERYING RECORDS (FILTER ROW)

The Database can become extremely large due to file size and record population/complexity. The user can considerably cut down the time it takes to locate 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 ▲	Description	Labor Craft Code	Estimated Hours
c			
CAL01	ANNUAL CALIBRATION	CONT	0.0000
CAL02	SEMI-ANNUAL CALIBRATION	CONT	0.0000
CAL03	ANNUAL CALIBRATION	CONT	0.0000

TO FILTER RECORDS:

1. Select the menu of the relevant Functional Area and open the page in which to use the Filter Row.
2. Choose the field 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. The Clear All Filter icon can be used to remove the filters from all fields at once to ensure no filtering is in a field off-screen to the left or the right.

DEFAULT FILTER

Proteus MMX contains functionality to automatically open a page with a preset 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 the user who continually filter/sort by pre-determined criteria.

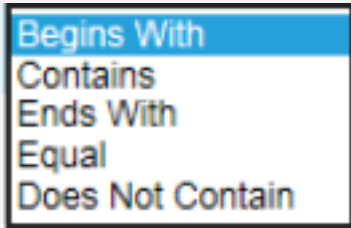
FILTER TYPES

By default, the Filter Row utilizes the **Starts With** method of filtering. Proteus MMX will display only those records which start with the requested text when this is selected in the drop-down next to the field in the Filter Row.

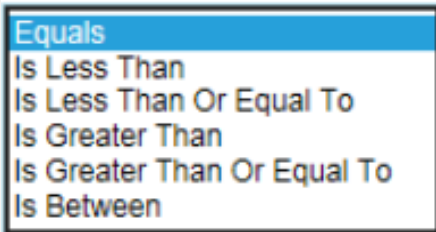
EXAMPLE: The user wants to view all assets that begin with: *FAN*

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

The other filter types are shown here:

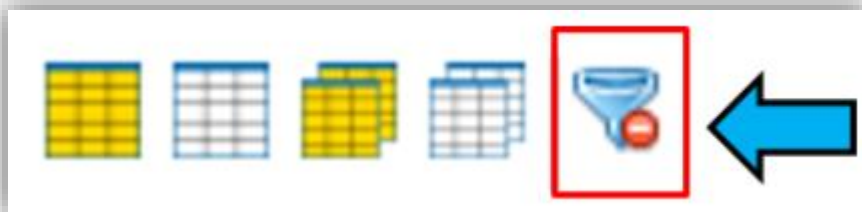


Date fields have the following filter types:



CLEAR ALL FILTER

The Record Navigator allows you to quickly clear any filters you've selected. Once prompted, the Clear All Filter will revert the Record Navigator view back to its default view settings.



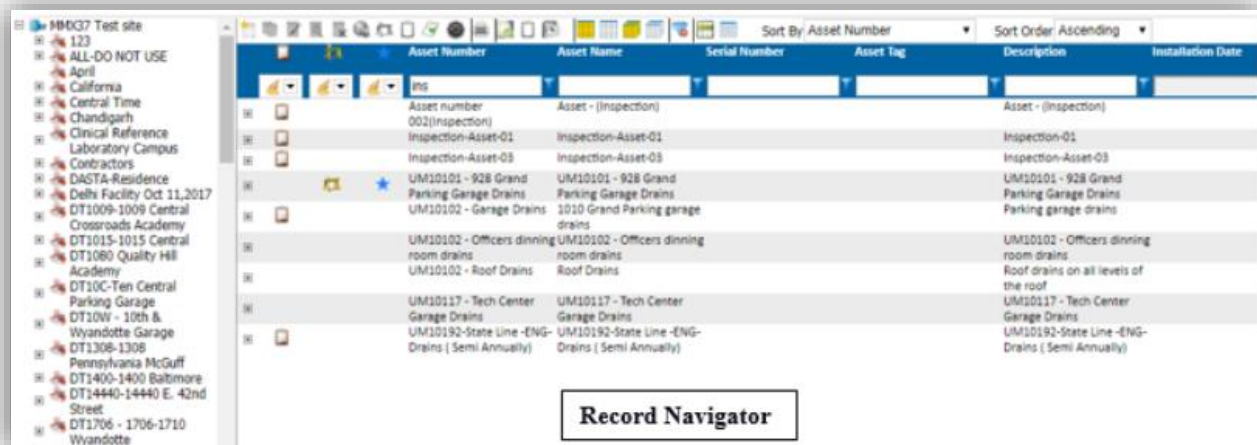
10. USING THE ASSETS RECORD NAVIGATOR

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

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

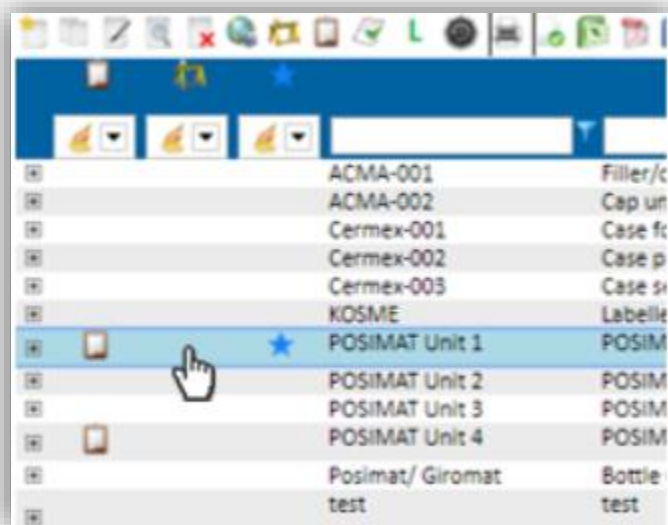
Note 1: The records displayed in the grid will be displayed based on the currently selected node in the Navigation Tree. If the topmost node is selected, all records will be displayed. Otherwise, they will be shown only for the currently selected node.

Note 2: In some instances, there is no navigation tree/browser.



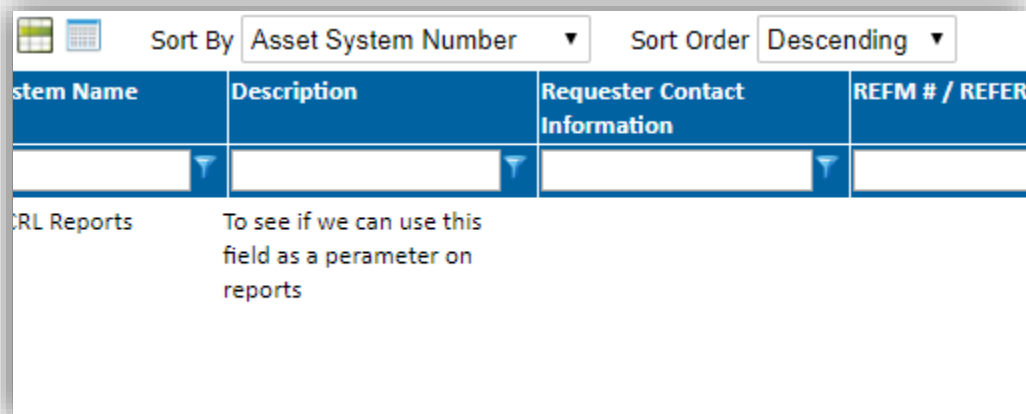
SELECTING A RECORD

To select a record, select the row of the record.



SORTING COLUMNS

Columns in the Record Navigator can be sorted in either ascending or descending order. To sort a column, select the **Sort By** drop-down to choose the column and then select from the **Sort Order** drop-down menu.



REORDERING COLUMNS

Columns in the Record Navigator can be reordered in any order as well as hidden. To reorder the columns, simply select the Column Setting icon above the Record Navigator.

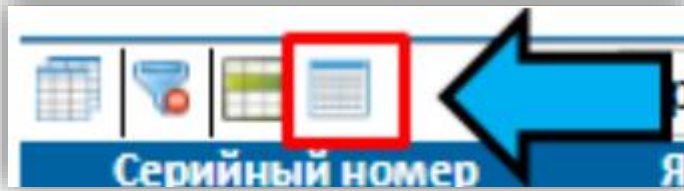


From the Grid Column Setting dialog box, you can select column names on the right and move them to the left side if you want them removed from the Record Navigator view. You can also change the ordering of the Record Navigator by selecting a column name on the right and using the up and down arrows to change the position of those column headers.

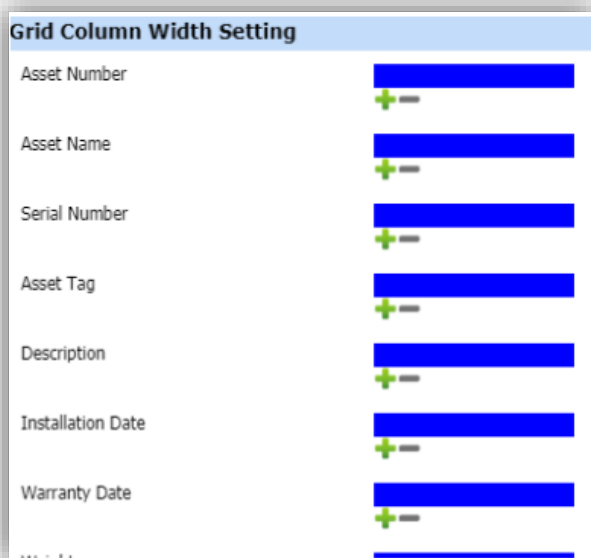


RESIZING COLUMNS

Columns in the Record Navigator can be resized. To resize the columns, simply select the Column Width Setting icon above the Record Navigator.

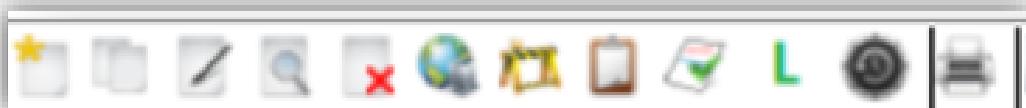


Select the + or – signs to expand or shrink the column widths.



ICON LIST

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

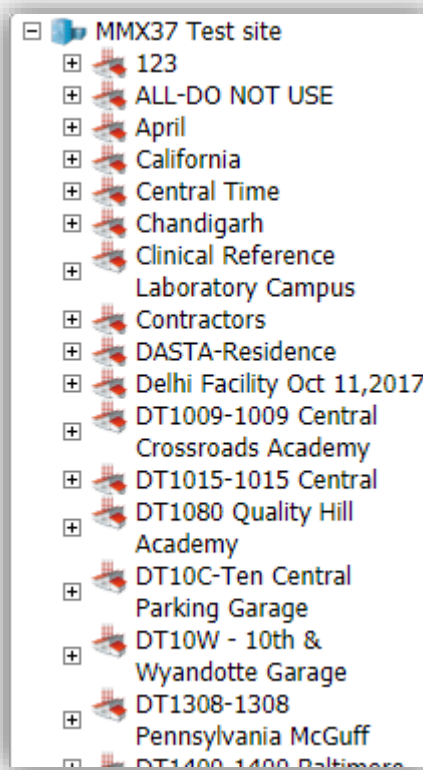


THE GRID

Most of the space within the Record Navigator consists of a table, or Grid, which shows the records relevant to the current functional area or tabs in rows, with the fields of each currently visible record aligned in columns. This is like the rows and columns of a spreadsheet including a toolbar to interact with the records appearing above the grid, and the first row contains a Filter Row that can be used to limit the displayed records to those with values that are preferred.

NAVIGATION TREE

The **Navigation Tree**, where applicable, is located on the left side of the screen and contains a tree structure of information relating to the current page. The purpose is to visually locate and display data on certain records. The **Navigation Tree** 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 navigation tree, the **Icon List** and the **Record Navigator** will refresh to display the correct data.



DETAIL ROWS

Detail Rows are rows in the record list that can be expanded to show related data. Detail rows have a (+) icon next to each record, indicating there is more information.

Asset System Number	Asset System Name	Description	Requester Contact Information	REF # / REFERENCE #	UserField 3	Resolution	UserField 5
test for c	Test for CRL Reports	Test for CRL Reports	To see if we can use this field as a parameter on reports				

Asset Number	Asset Name	Serial Number	Asset Tag	Description	Installation Date	Warranty Date	Weight	Rating	Capacity	Model
DTCRLA-600100-RTU-A-2	Roof Top Unit A-2			Building A East Side						DM150N20P2
DTCRLA-600100-RTU-A-4	Roof Top Unit A-4			Building A East Side						GS516-060-75
DTCRLA-600100-RTU-A-6	Roof Top Unit A-6			Building A East Side						ZR180N24H2A
DTCRLA-600100-RTU-A-8	Roof Top Unit A-8			Building A East Side						D2CG072N095
DTCRLA-600100-RTU-A-10	Roof Top Unit A-10			Building A East Side						D7CG036N075
DTCRLA-600100-RTU-A-16	Roof Top Unit A-16			Building A East Side						
DTCRLA-600100-RTU-A-18	Roof Top Unit A-18			Building A East Side						LGA060H2BH1
DTCRLA-600100-RTU-A-12	Roof Top Unit A-12			Building A West Side						D3CE090A25C
DTCRLA-600100-RTU-A-14	Roof Top Unit A-14			Building A West Side						D7CG060N095

11. UTILIZING DROP-DOWN LISTS AND POP-UPS

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 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 data into the appropriate fields.

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

TO REMOVE AN ITEM FROM A DROP-DOWN:

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

TO EDIT AN ITEM IN A DROP-DOWN:

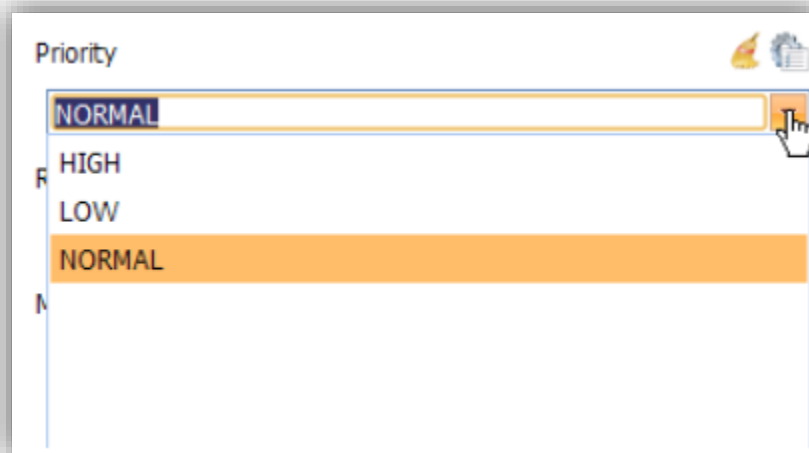
1. Go to the **Settings** menu
2. Select a page and a setting
3. Select your selection
4. Select **Edit**
5. Edit your information
6. Repeat as necessary

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, checkboxes, etc.). A pop-up appears because of the user selecting a Task or icon. Some common uses for pop-ups are:

- Creation of Items
- Addition to Lists
- Adjusting Quantities

Pop-ups in Proteus MMX appear as a dialogue over the current screen and are not affected by web browser pop-up blocker settings.

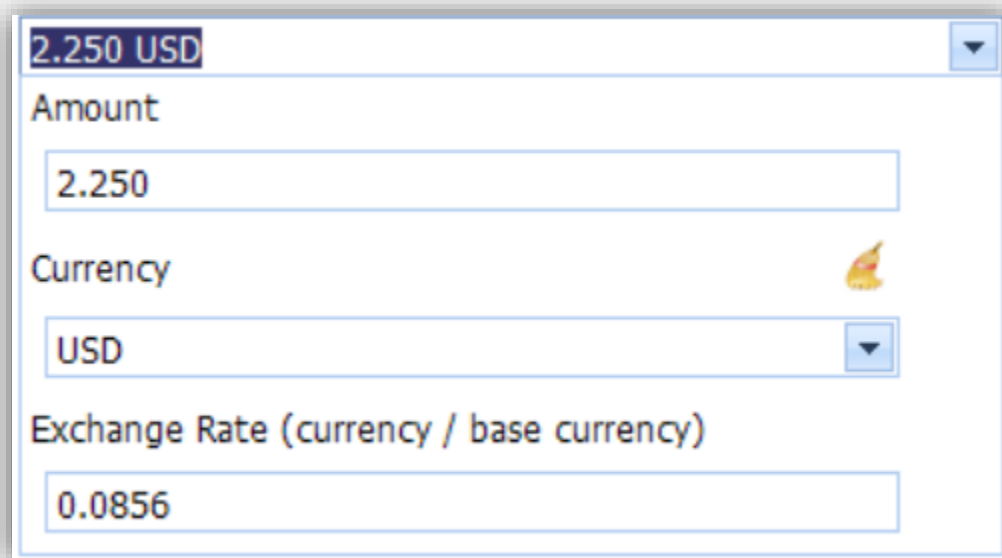


CURRENCY DROP-DOWNS

There are three (3) fields for currency:

1. Amount
2. Currency
3. 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 rate 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" and a downward arrow icon. 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 downward arrow icon, with a small yellow icon to its right. 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-ups in Settings, under **Company > Currencies**.

12. RECORD NOTES

The Notes section houses a document editor on which any miscellaneous information associated with the record can be entered. Think of it as a “notepad” with which any relevant information, such as vendor performance, purchasing details, equipment breakdown history, etc., can be recorded. Data can be typed directly into the editor or copied and pasted using the common keyboard shortcuts for these features, **Ctrl+C** and **Ctrl+V**, respectively.

The Notes section has many of the basic functions that are contained in many of today's standard word processing software packages. Some of these functions are:

- Copy
- Cut
- Paste
- Undo
- Redo
- Bullet/List

The Notes section is in the **Details** tab of a record.

