



PROTEUS MMX TRAINING MANUAL –
SERVICE REQUESTS

EAGLE TECHNOLOGY, INC.



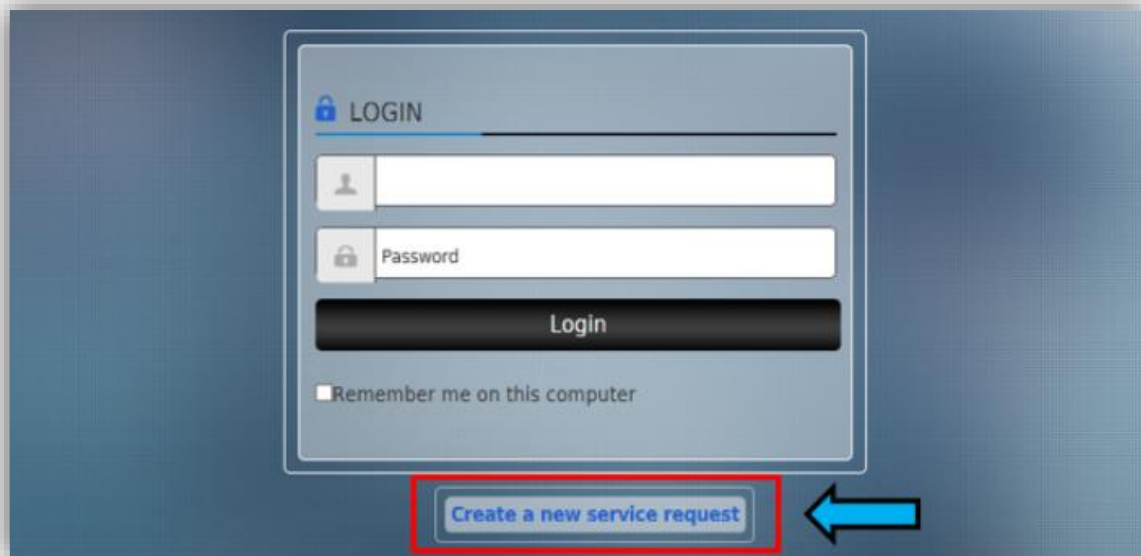
CONTENTS

Service Requests	2
1. Overview.....	2
2. Details.....	2
3. Pending Service Requests.....	3
4. Work Orders.....	4
5. Email.....	4
6. Attachments.....	5
7. Entering Data.....	5
To Enter New Service Request.....	5
Service Request Administrator	7
1. Overview.....	7
2. Service Request Numbering.....	9
3. Custom Service Request Numbering.....	9
To Create Custom Work Order Numbering Template.....	9
Custom Service Request Numbering Defined Terms.....	10
4. Entering Data.....	10
Creating Work Order from Service Request.....	10
Accepting a Service Request.....	11
Declining a Service Request.....	11
Adding Requester.....	11
Send Survey to Requester.....	11

SERVICE REQUESTS

1. OVERVIEW

The Service Request Module allows anyone with access to a web browser and the company's Proteus MMX URL to submit a request for maintenance to be performed. A requester can access the Service Request form from the MMX login screen, without the need for a login and password to the full system.



2. DETAILS

When a requester clicks the Service Request link, they're taken to the Details screen. The Details provides a customizable form field related to the problem or request. The requester fills out the pertinent fields and then clicks the **Submit** button when complete.

The submitted Service Request is sent to the Service Request Administrator module in Proteus MMX where a supervisor or maintenance manager can view and edit requests. At this point, the request can also be assigned to a technician and set to automatically email to that technician and/or other employees (i.e. their supervisor). The Service Request Administrator will then choose to **Accept** or **Decline** the request. Once accepted, the request will become a work order in the system.

Note: The requesters can be automatically notified if their request becomes a work order and when the work order is completed if there is a status change and when it's closed.

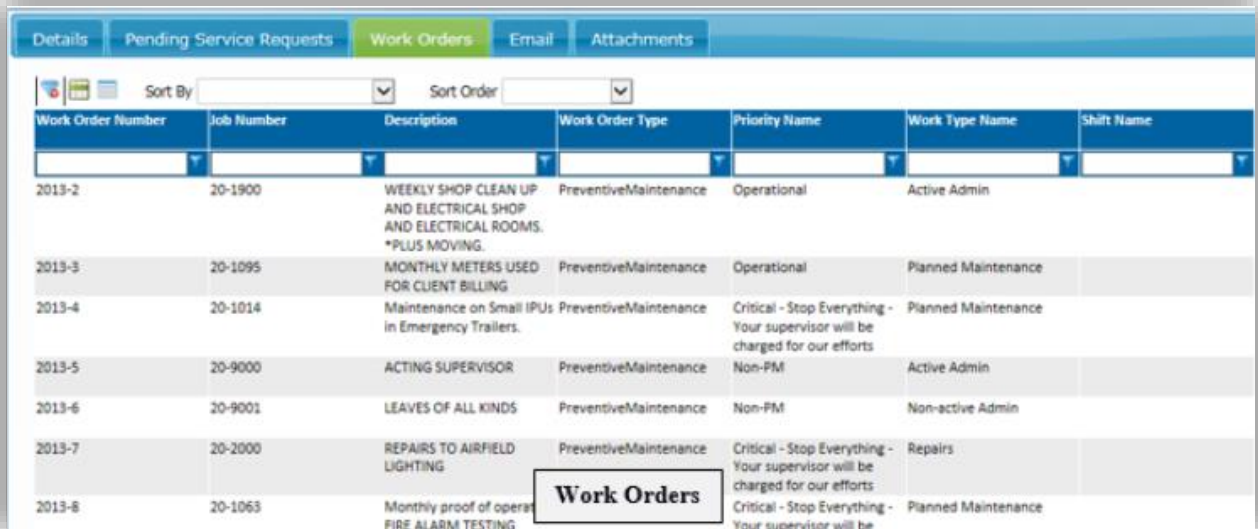
3. PENDING SERVICE REQUESTS

If a requester has sufficient rights, they can view a list of all pending requests. These are requests that have been submitted, but not accepted or declined yet by a service request administrator. The requester can check if their problem or request has already been submitted by another person.

Request Number	Requested Date	Description	Required Date	Requester	Requester Phone
20150622001	06/22/2015	Defib not pulsing right	06/22/2015		
20150624002	06/24/2015	a real issue	06/24/2015		
20150625002	06/25/2015	air seams stale	06/25/2015		
20150625003	06/25/2015	Office needs painting	06/25/2015		
20150626001	06/26/2015	room needs painting	06/26/2015		
20150714001	07/14/2015	Water leaking in boys bathroom	07/14/2015	Mat	+1 (613) 229-6677
20150714002	07/14/2015	Cut andd Pasted Request	07/14/2015		
20150714003	07/14/2015	Water leak	07/14/2015		
20150717001	07/17/2015	Milling station #4 sounds	07/17/2015	Mat	+1 (613) 229-6677
20150731001	07/31/2015	Col			

4. WORK ORDERS

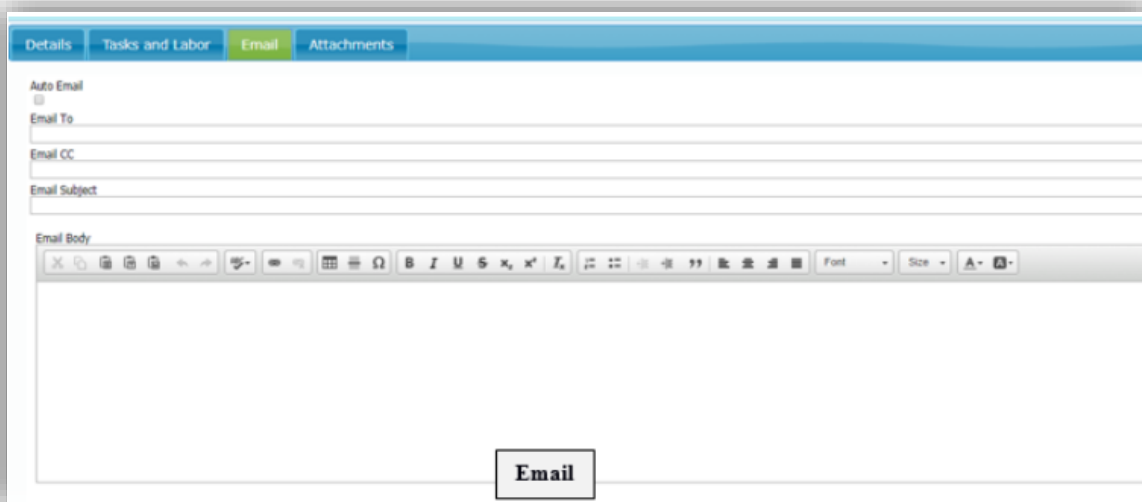
If a requester has sufficient rights, they can view the list of work orders in the system. The requester can view any status updates to their request here once it is accepted and becomes a work order.



Work Order Number	Job Number	Description	Work Order Type	Priority Name	Work Type Name	Shift Name
2013-2	20-1900	WEEKLY SHOP CLEAN UP AND ELECTRICAL SHOP AND ELECTRICAL ROOMS. *PLUS MOVING.	PreventiveMaintenance	Operational	Active Admin	
2013-3	20-1095	MONTHLY METERS USED FOR CLIENT BILLING	PreventiveMaintenance	Operational	Planned Maintenance	
2013-4	20-1014	Maintenance on Small IPUs in Emergency Trailers.	PreventiveMaintenance	Critical - Stop Everything - Your supervisor will be charged for our efforts	Planned Maintenance	
2013-5	20-9000	ACTING SUPERVISOR	PreventiveMaintenance	Non-PM	Active Admin	
2013-6	20-9001	LEAVES OF ALL KINDS	PreventiveMaintenance	Non-PM	Non-active Admin	
2013-7	20-2000	REPAIRS TO AIRFIELD LIGHTING	PreventiveMaintenance	Critical - Stop Everything - Your supervisor will be charged for our efforts	Repairs	
2013-8	20-1063	Monthly proof of operat FIRE ALARM TESTING		Critical - Stop Everything - Your supervisor will be	Planned Maintenance	

5. EMAIL

If a requester has sufficient rights, they can view the Email tab in Service Request. Here they can send a message to a supervisor or employee with any additional information regarding their service request before its submitted.



Details Tasks and Labor **Email** Attachments

Auto Email

Email To

Email CC

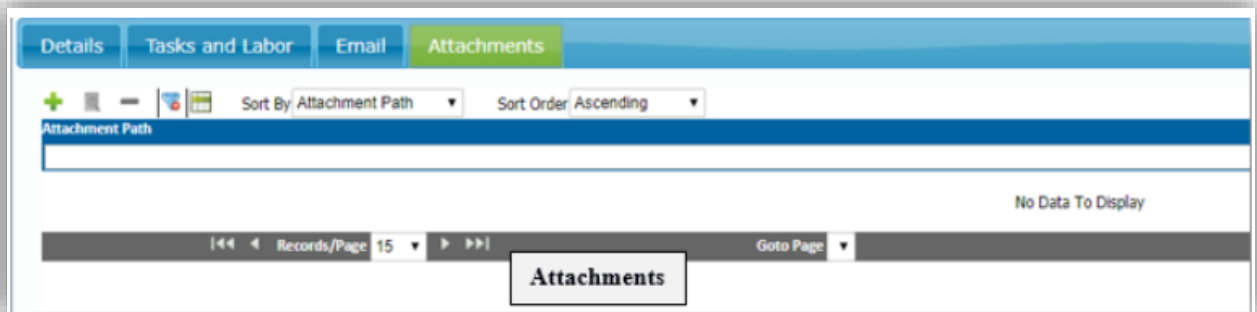
Email Subject

Email Body

X Undo Redo Bold Italic Underline Link Unlink Bulleted List Numbered List Indent Outdent Font Size Color Background Color

6. ATTACHMENTS

If the requester has sufficient rights, they can view the Attachments tab in Service Request. Here they can attach a file (Excel, Word, PDF, video, picture, etc.) to their service request before it is submitted.



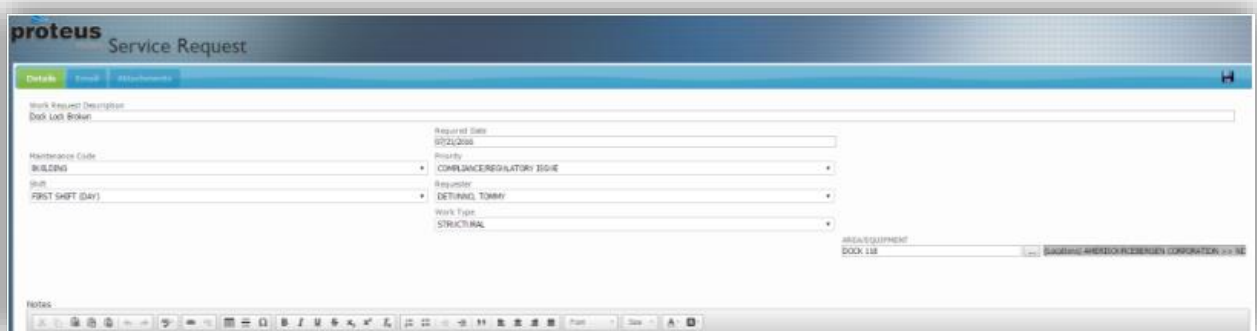
7. ENTERING DATA

TO ENTER A NEW SERVICE REQUEST, FOLLOW THESE STEPS:

1. From the Proteus MMX login screen, click **'Create a new service request'** link.

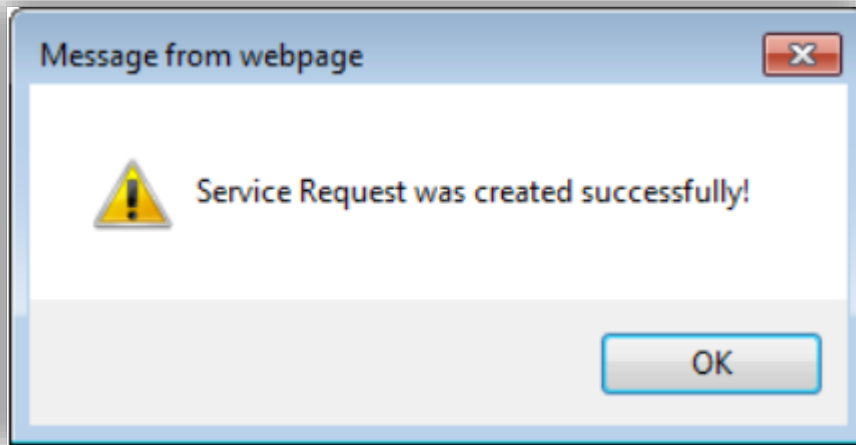


2. Enter the necessary fields on the Details screen.



Note: If you have sufficient rights, you can also:

3. Enter the email address(es) of the persons who should receive notification of the request.
4. Enter any attachments (text, movie, sound, etc. files) to the request.
5. When the service request is complete, click the **Submit** button. You will receive the following message:



SERVICE REQUEST ADMINISTRATOR

1. OVERVIEW

The Service Request Administrator module allows a supervisor or maintenance manager to view the incoming Service Requests. This module is accessed from Proteus MMX once logged into the system.

Request Number	Requested Date	Description	Required Date	Requester	Requester Email
20170824001	08/24/2017	astafa	08/24/2017		
20170823008	08/23/2017	TEST - MMX-314	08/23/2017		
20170823001	08/23/2017	Description 1	08/23/2017		
20170822004	08/23/2017	Test	08/23/2017		
20170822003	08/23/2017	Test 1	08/23/2017		
20170822002	08/23/2017	Test 1	08/23/2017	CDG-Both	
20170817003	08/17/2017	Test Service Request - Please ignore	08/17/2017		
20170811001	08/11/2017	Description	08/11/2017		
20170803002	08/03/2017	service request	08/03/2017	nazish-Both-UP Zahid-cdg- Service/Purchasing	nazisha@inzerotech.com zahidqba306@gmail.com
20170731007					

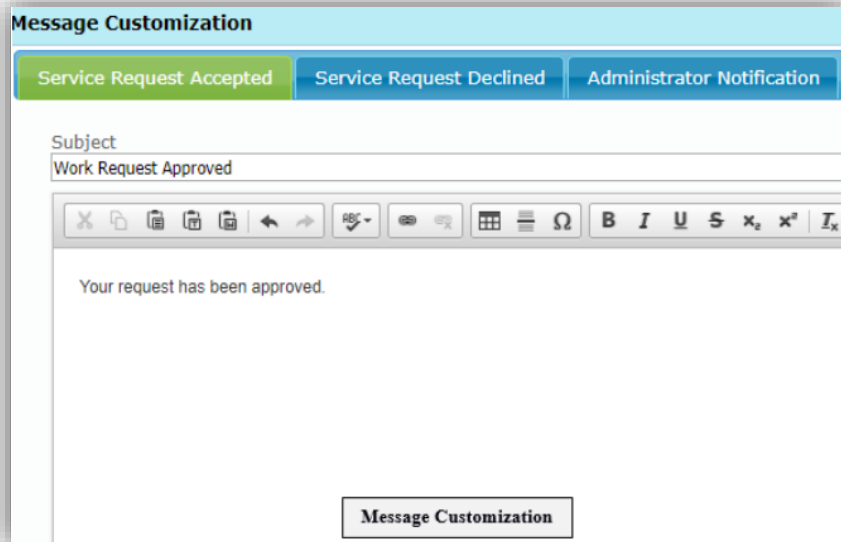
A Service Request Administrator can edit any of the service requests from here. They can edit the requester's information, add additional information such as assigning a technician and/or tasks, adding relevant email addresses or adding attachments.

When they're satisfied with the information on the Service Request, the administrator can then Accept the request. Once accepted, the service request will be deleted from the list and will become a Work Order in Proteus MMX.

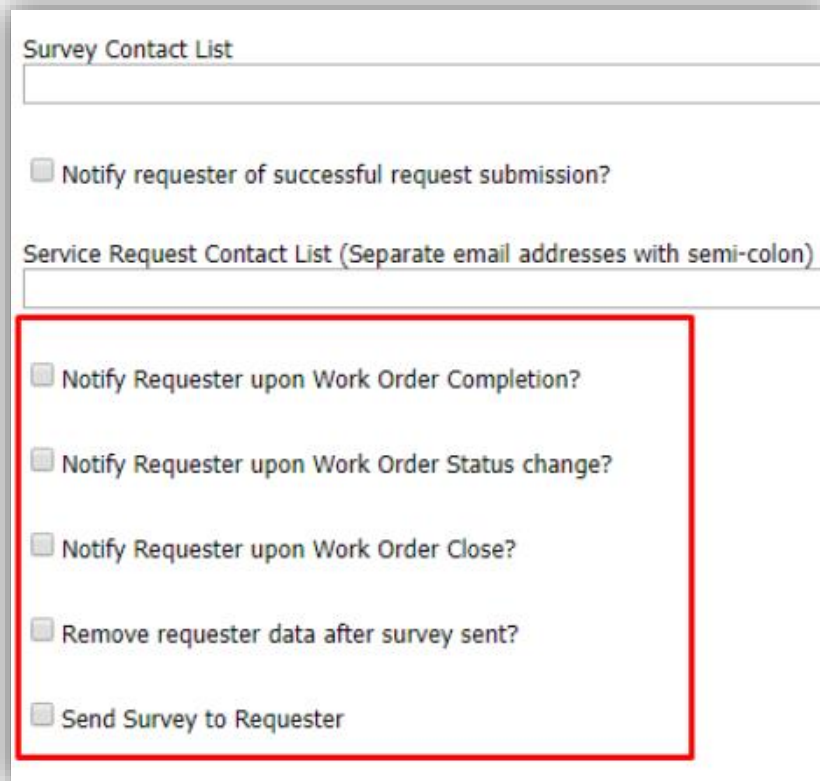
Note: Service Requests must have a Target (asset or location) attached to them before they can be accepted.

The administrator can also choose to Decline the Service Request if it is a duplicate record, for example.

Note: Service Requests can be set to automatically send an email to the requester telling them that their request has been accepted or declined. An email can also be sent automatically to an Administrator telling them that a new request has come in. These features are accessed in the Settings of Proteus MMX.



Note: Service Requests can be set to automatically notify the requester when their work order status changes, is completed or is closed. The features are accessed in Settings of Proteus MMX.



2. SERVICE REQUEST NUMBERING

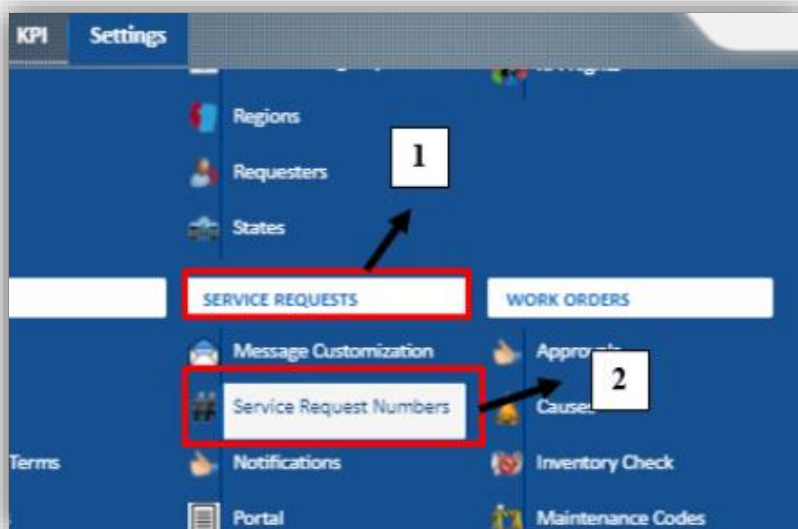
Request Numbers in the Service Request Administrator page are assigned automatically. Proteus MMX will number the work orders in date-code fashion (YYYYMMDDNNN, with “N” being a sequential number starting with **001**).

3. CUSTOM SERVICE REQUEST NUMBERING

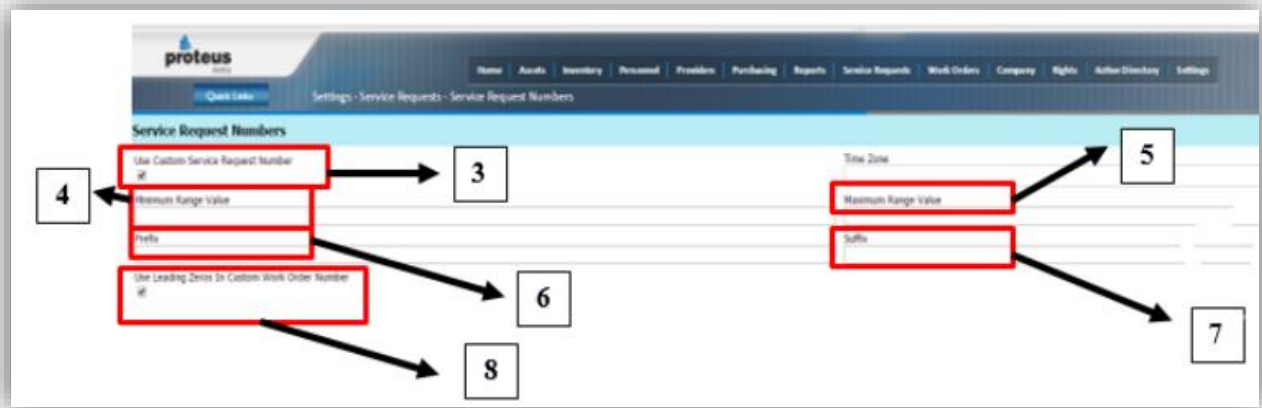
The user has the option to create a custom template for Service Request Numbering. This can be done through **Settings**.

TO CREATE THE CUSTOM WORK ORDER NUMBERING TEMPLATE:

1. Go to **Service Requests** from the **Settings** drop-down.



2. Select **Service Request Numbers** options
3. Select the **Use Custom Service Request Number** checkbox
4. Enter a **Minimum Range Value**
5. Enter a **Maximum Range Value**
6. Enter a **Prefix**
7. Enter a **Suffix**
8. If desired, click the **Leading Zeros** checkbox



CUSTOM SERVICE REQUEST NUMBERING DEFINED TERMS:

- The **Minimum Range Value** is the first number in the Request Number. The Service Requests will be auto-incremented until they reach the **Maximum Range Value**.
- The **Maximum Range Value** is the last possible request number in the template.
- The **Prefix** is a string that will form the first part of the request number.
- The **Suffix** is a string that will be added after the range.
- If **Leading Zeros** is selected, Proteus MMX will show all leading zeros in the request (**001 vs. 1**).

4. ENTERING DATA

A service request administrator can create a new work order directly from the Service Request Administrator page.

CREATING A WORK ORDER FROM SERVICE REQUESTS:

To create a Work Order:

1. Open **Service Requests** from the Service Requests Functional Area.
2. Click the **New** button.
3. Enter Description, Target, and any other necessary data on the **Details** tab.
4. Save the request to continue to remaining tabs.
5. All remaining tabs/information can be entered at this point.
6. **Save** your selection.
7. You can then click the green check mark to **Accept** the request, or you can return to the record navigator, select the request and click the **Accept** button.

Note: Targets can be an Asset, Customer Asset, Location, or Customer Location.

ACCEPTING A SERVICE REQUEST:

To Accept a Service Request:

1. Open ***Service Requests*** from the Service Requests Functional Area.
2. Select the request from the record navigator.
3. Click the ***green checkmark (✓)*** to **Accept** the Service Request.

DECLINING A SERVICE REQUEST:

To Decline a Service Request:

1. Open ***Service Requests*** from the Service Requests Functional Area.
2. Select the request from the record navigator.
3. Click the ***red circle (⊘)*** to **Decline** the Service Request.

ADDING REQUESTER:

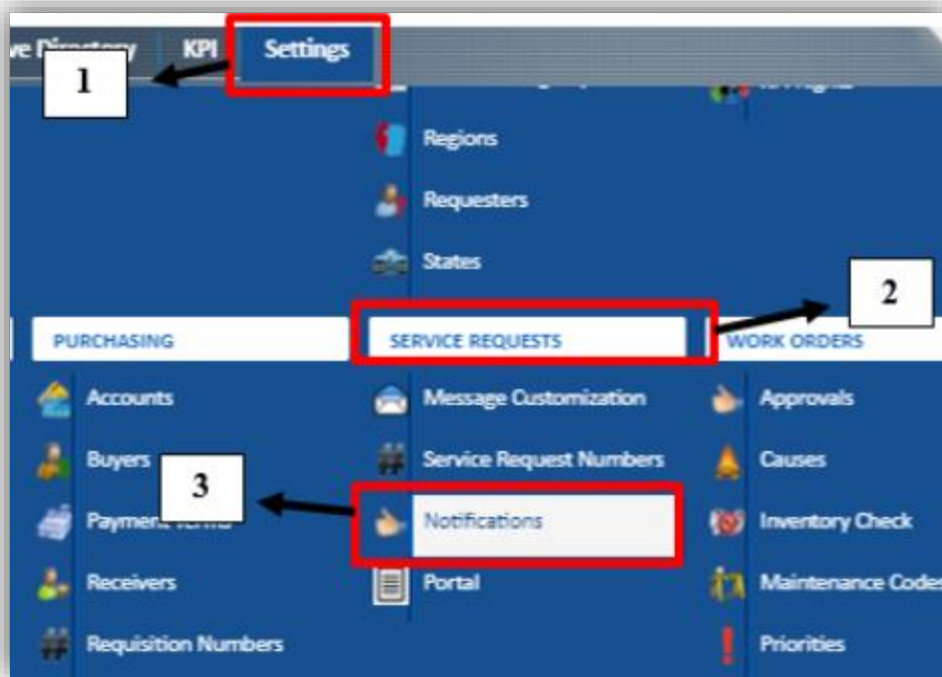
To Add a Requester:

1. Open ***Service Requests*** from the Service Requests Functional Area.
2. Select the request from the record navigator.
3. Fill out the new requester's information.
4. Click the ***Save*** icon.

SEND SURVEY TO REQUESTER:

To Send Survey to the Requester:

1. Go to ***Settings***
2. Click ***Service Request***
3. Click ***Notifications***



4. Click the **Send Survey to Requester** checkbox. From there, you can elect to submit it **Upon Work Order Complete** or **Work Order Close**.

