proteus mmx

PROTEUS MMX TRAINING MANUAL – SUPERVISORY FUNCTIONS & SETTINGS

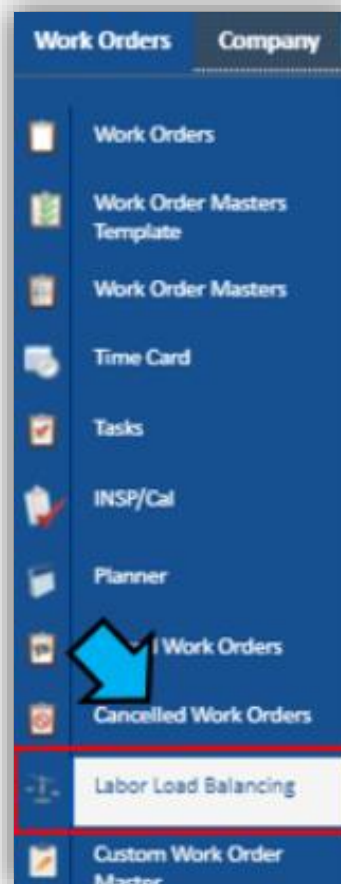EAGLE TECHNOLOGY, INC.

eagle
TECHNOLOGY

CONTENTS

LABOR LOAD BALANCING

1. OVERVIEW

Labor Load Balancing is a graphical and interactive display of active preventative maintenance and demand maintenance work orders scheduled by personnel. Labor Load Balancing is located under the *Work Orders* module drop-down.

Personnel is searchable using the search box. An employee is considered "on a work order" if they are in the **Tasks and Labor** tab of an active work order.

The arrow button next to the graph moves the user into the next week for that user.

Labor Load Balancing

Labor Load Balancing - Daily

This is the screen showing 'daily' details for an employee. The employee is highlighted. Each work order will be represented by the info cards shown above. The exclamation icon will take the user to a tooltip showing all the tasks assigned to the user on the work order, as well as the *Additional Details* panel. These items cannot be edited from here.

The user can switch jobs assigned to employees, by dragging and dropping the card to another user. For example, the user could drag '**Work Order 20160101001'** by the handle on the left side of the card to Sam Richards. Jim Holzman would be removed from all tasks on the work order, and Sam Richards will be added.

The card will disappear from Jim Holzman's queue and appear Sam Richards'.
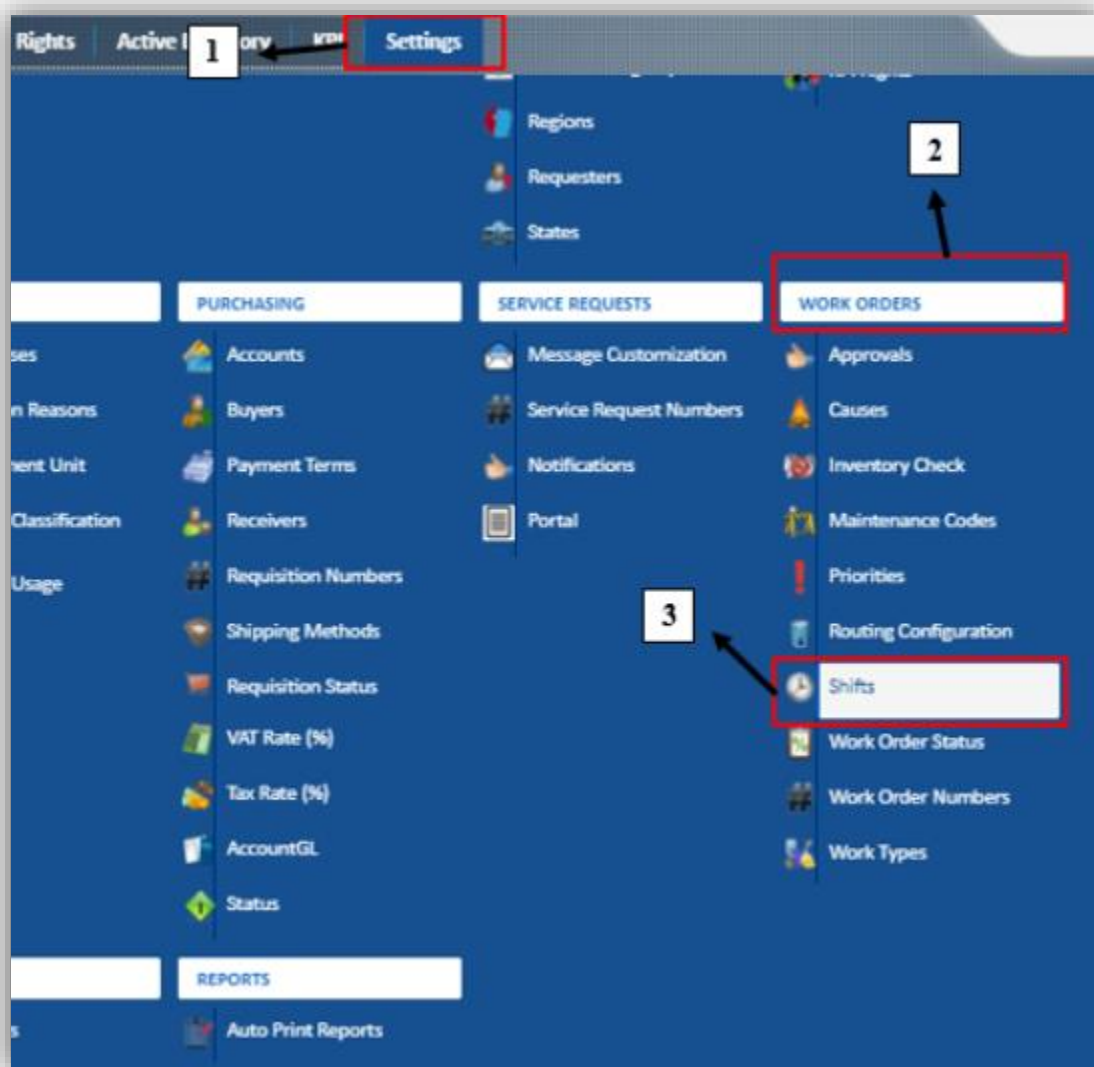
EMPLOYEE SHIFTS

1. OVERVIEW

In shift-based scheduling, we maintain shifts for scheduler activation. Scheduler services would be activated in given shift time.

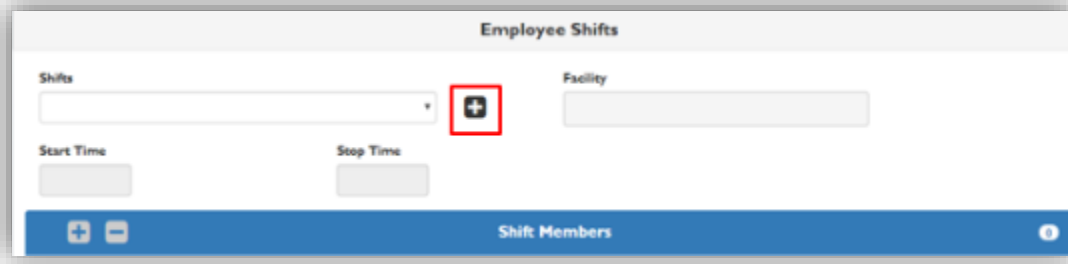### TO ACCESS EMPLOYEE SHIFTS IN PROTEUS MMX

1. Go to the **Settings** module.
2. Go to **Work Orders** section of the drop-down menu.
3. Click **Shifts.**
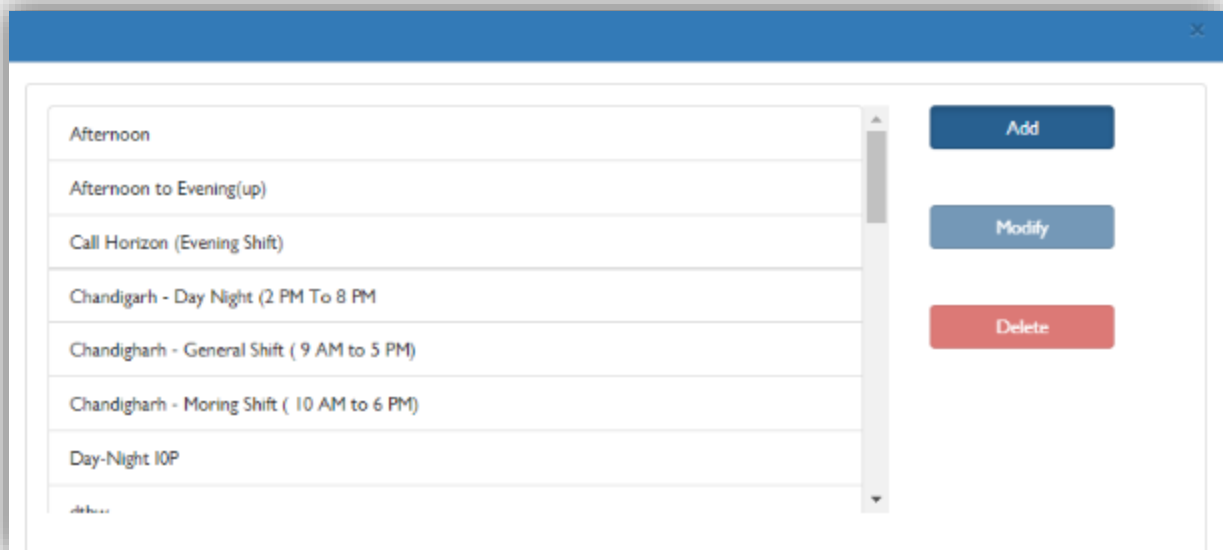
1. ADD SHIFT

a. Click the *Add (+)* button to add a shift.

b. Select any given shift or click the *Add (+)* button to create your own shift for your facility.

Here you can enter your shift name and select the facility from the drop-down. (You can select multiple facilities.) **[1]**

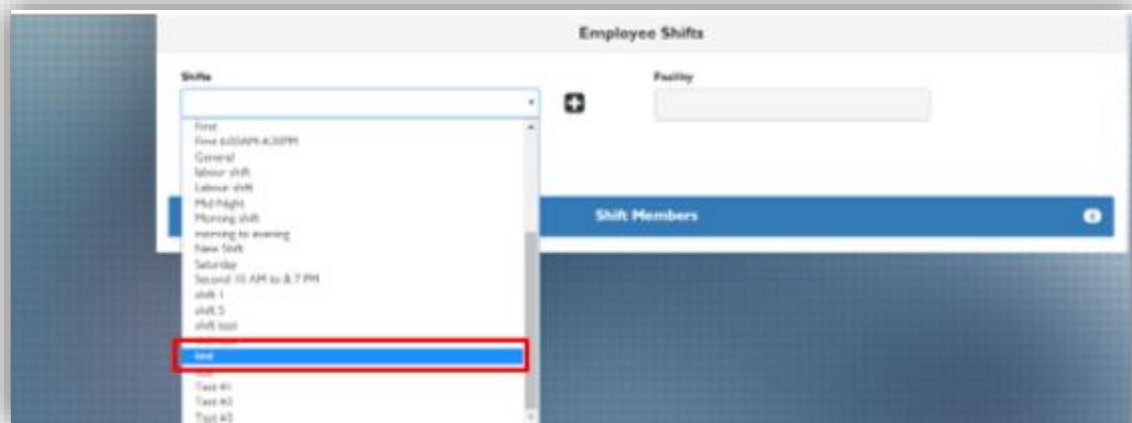c. Only selected facilities can use this shift. After giving the *Start Time* and *Stop Time* **[2],** click the *Save* button. **[3]**
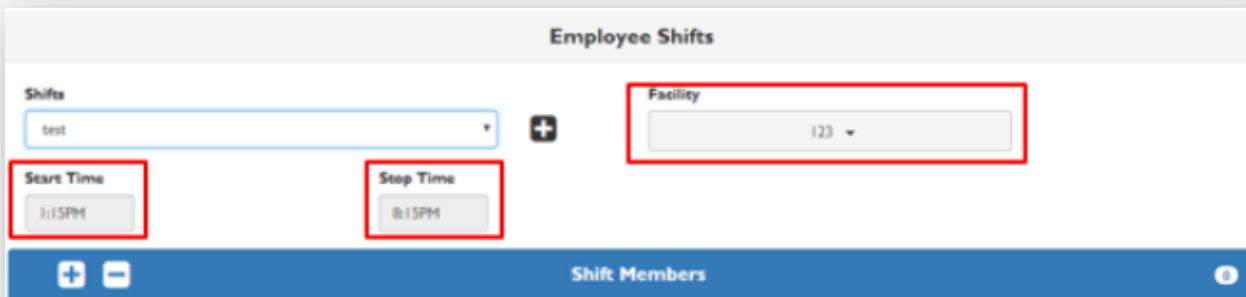

d. As you click the *Save* button, it will give you an alert stating that your record was successfully submitted. Click on the *Close* button.

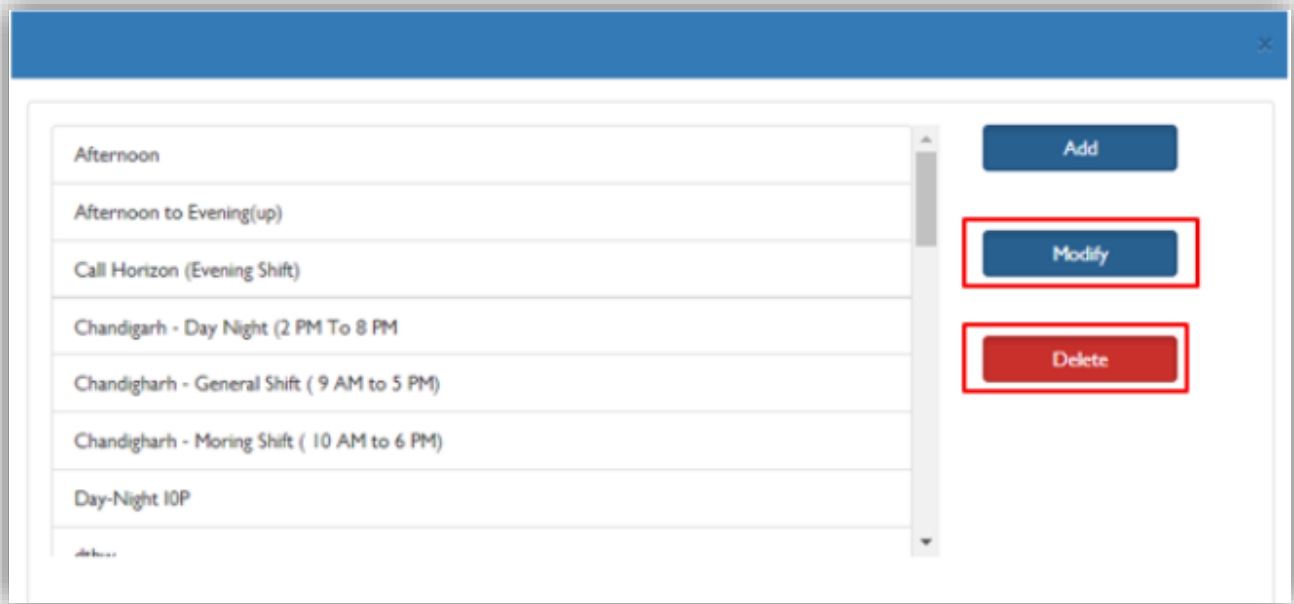e. Now select your shift from the **Shifts** drop-down.

As you select the shift from the drop-down, **Facility** and **Shift Time** (**Start Time** & **Stop Time**) will be populated in Read-Only mode.

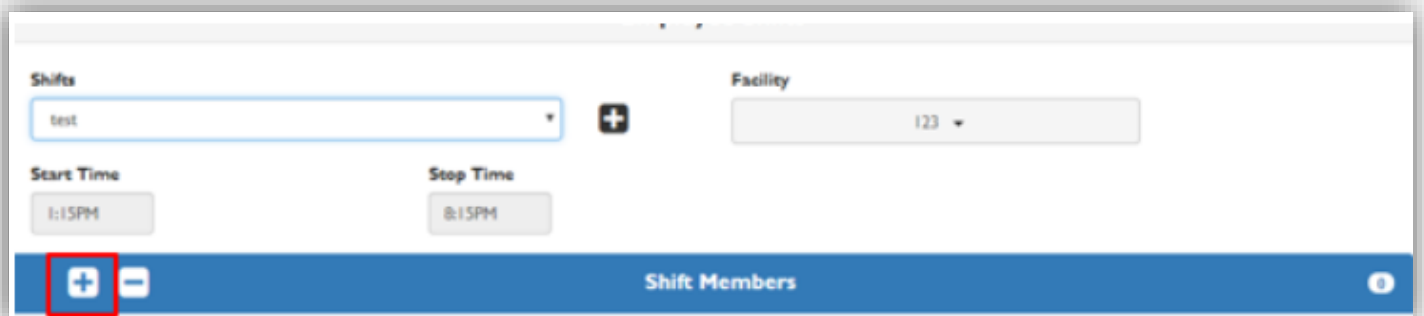f. You can modify or delete your shift by selecting shift from the below screen and then click on *Modify* (to modify the shift) or delete (to remove the shift).
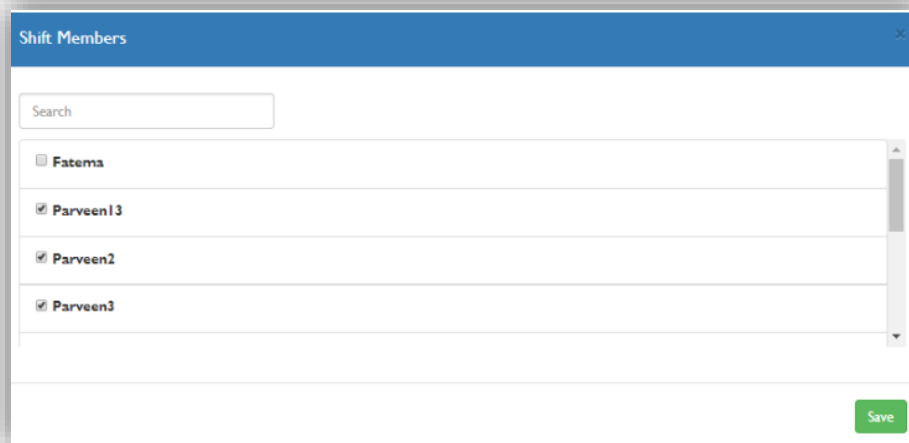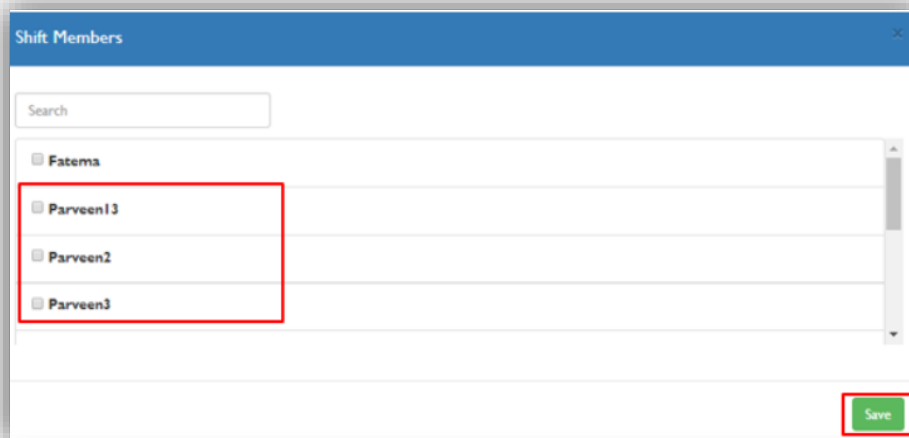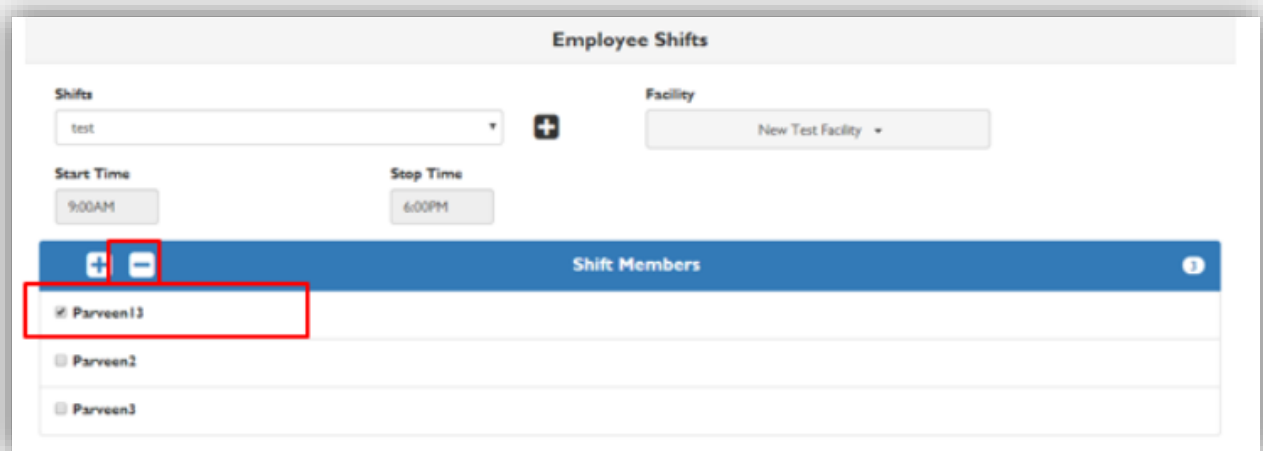

2. ADD SHIFT MEMBERS

a. Click the *Add (+)* button on *Shift* members.

Here, you can add multiple members by selecting employees. Click on the *Save* button once you have completed your selection.

b. You can delete shift members by selecting a member and clicking the *Delete (-)* button.
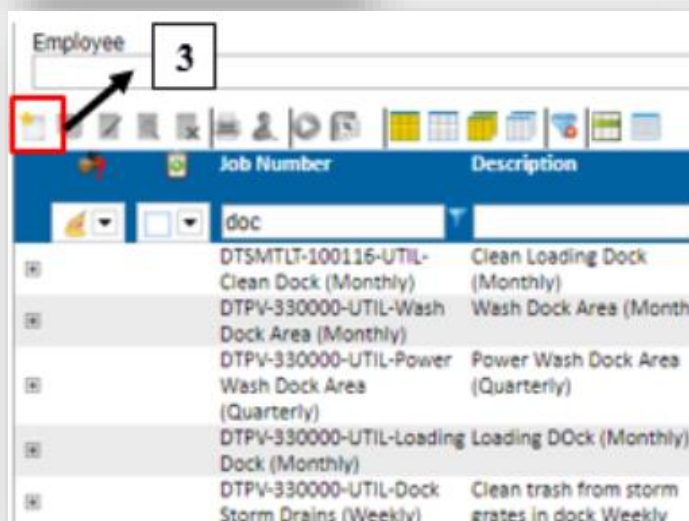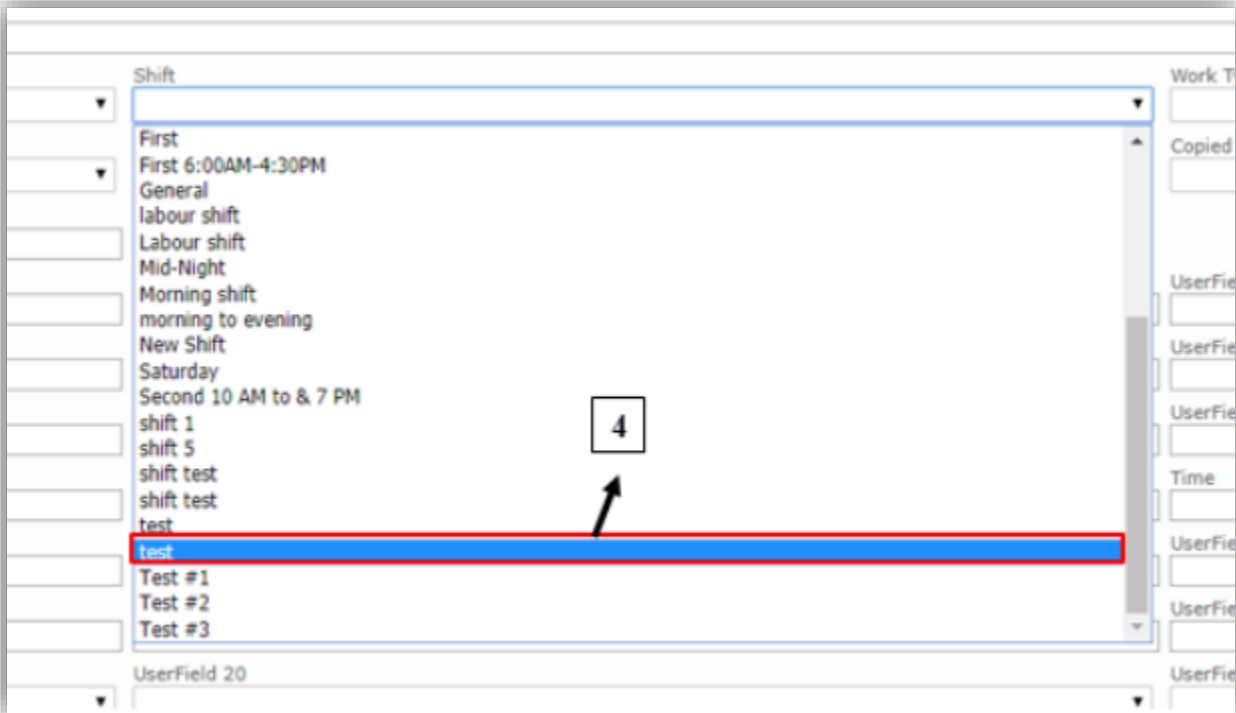
3. **LAST STEP**

a. Now you'll have to create a work order master using that shift you have created. Read the following steps to accomplish this task:

1. Go the **Work Orders** module drop-down.

2. Click on **Work Order Masters.**

3. Click the **New** icon from the Record Navigator.

4. Locate the **Shift** drop-down to utilize your newly created shift

Shift

First
First 6:00AM-4:30PM
General
labour shift
Labour shift
Mid-Night
Morning shift
morning to evening
New Shift
Saturday
Second 10 AM to & 7 PM
shift 1
shift 5
shift test
shift test
test
test
Test #1
Test #2
Test #3

UserField 20

Work T

Copied

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Time

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UserFie

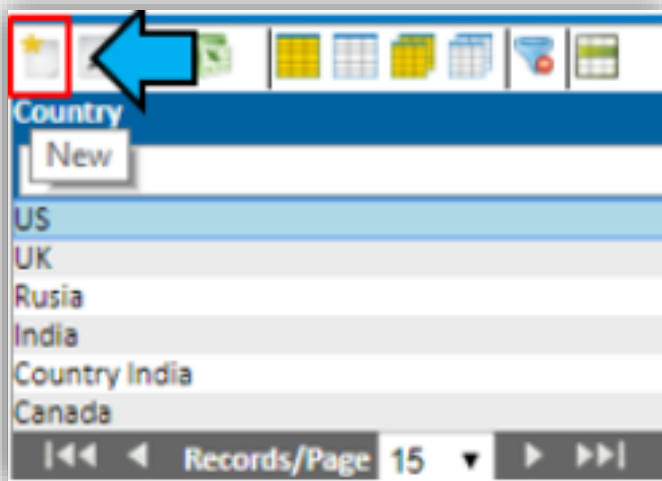UserFie

4

SETTINGS

1. SMALL TABLES SET-UP

For various countries selections to be available they must be added prior to work order entries. These can be added to the **Settings** feature.

COUNTRIES

To set-up countries, go to **Settings**, then **Countries** to add countries for the company.

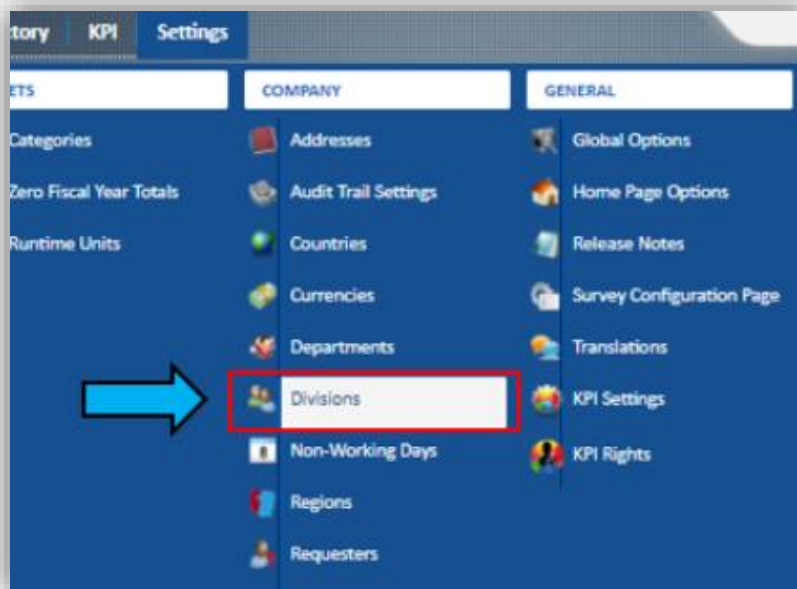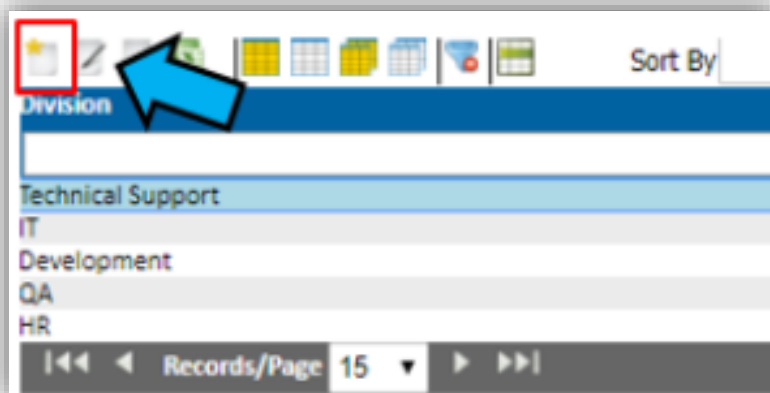Select the **New** icon to add a new country.
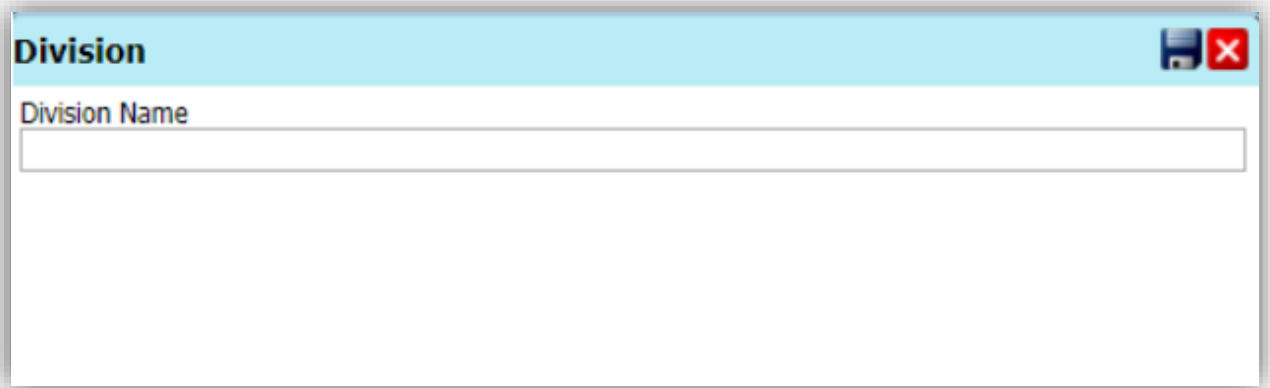
Country

Country Name

DIVISIONS

To set-up countries, go to **Settings**, then **Divisions** to add divisions for the company.

Select the **New** icon from the Record Navigator, to add a new **Division.**

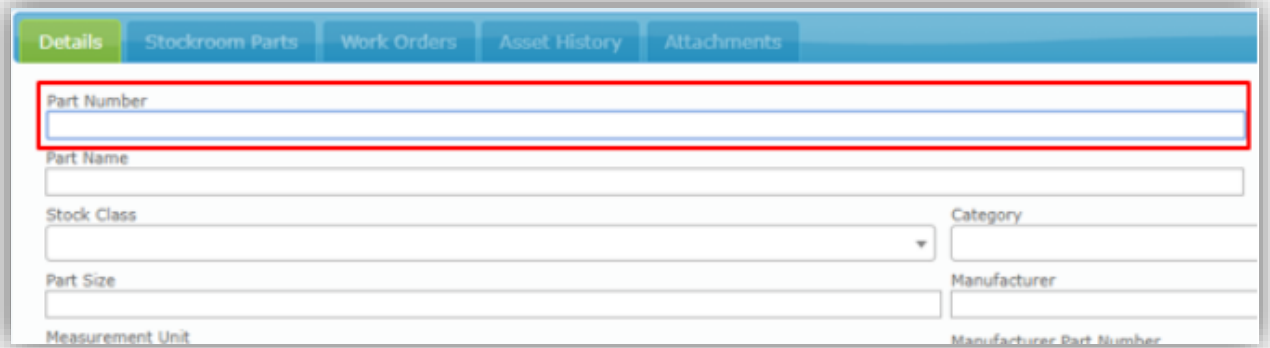Enter a new Division name and select the *Save* icon to add the new Division.

2. ADDING PART NUMBERS

When adding a part, the following naming convention is recommended:

Location ID, followed by the vendor part number

Enter a new part number and part name (and other pertinent information), and select the *Save* icon.
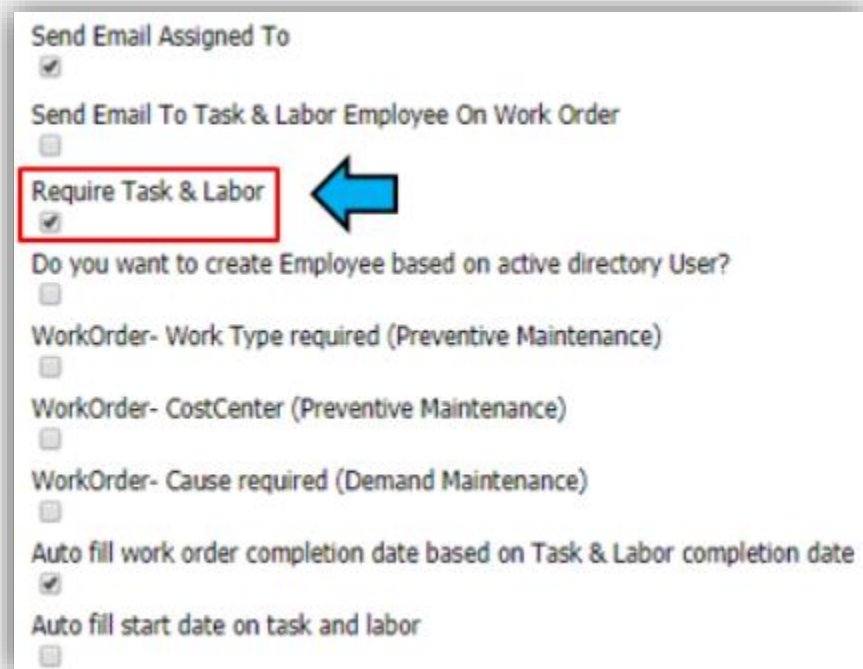
3. REQUIRE LABOR HOURS

When manual entry of labor hours is required, you can go to:

> ➢ **SETTINGS > WORK ORDER NUMBERS**

There, you will click on the **Require Labor Hours** checkbox. When selected, the setting will override the automatic default hours normally inserted when the user clicks the **Complete and Close** icon, forcing manual entry from the **Tasks and Labor** tab.
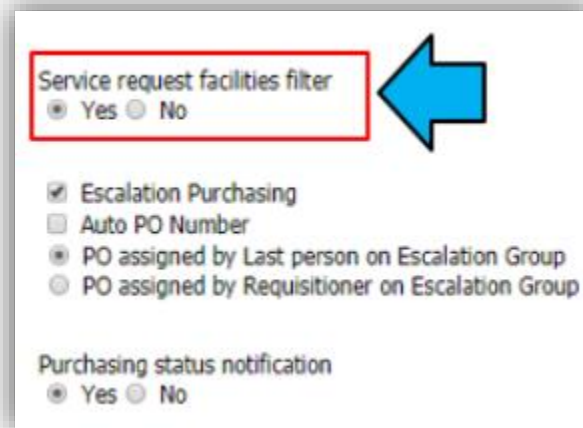
4. SERVICE REQUEST SETTINGS – FACILITY

Facility-specific selections can be turned **ON** or **OFF** by going to:

> **SETTINGS > GENERAL > GLOBAL OPTIONS**

There, you will select **YES** or **NO** on the *Service Request Facilities Filter* checkbox.

If you select **YES,** then the service request filter will work as follows:

> - The drop-down will populate requesters based on facilities selection by the user.
> - New facilities drop-down will be added; it will show all facilities in ascending order.

If you select **NO**, then the create service request page will continue to work as it is, allowing for any selections (not facility-based or user-based).

5. SEARCH FOR REQUESTER

When there is a large volume of requesters, the search function can be utilized to quickly find a requester by typing a few key letters.

TO ACCESS THE REQUESTERS SEARCH FIELD
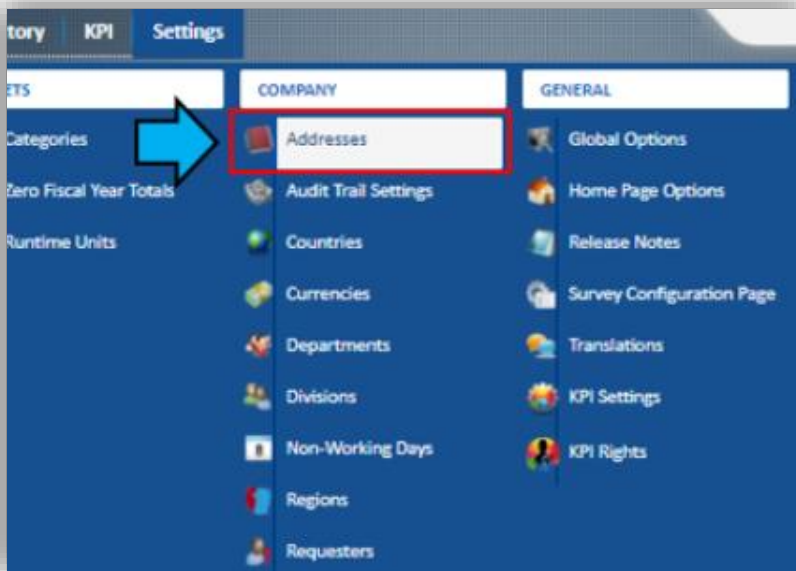
1. Go to *Settings > Company > Requesters*
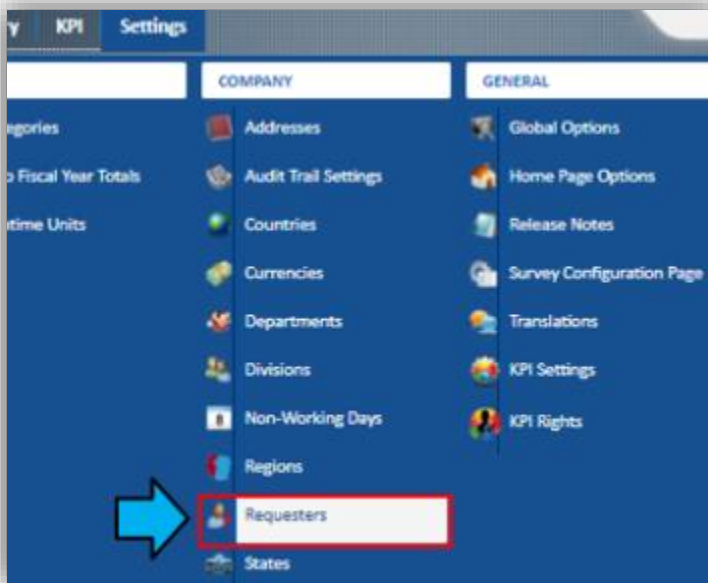
2. Type your query in the search bar **[1].** Results will populate based off what you entered. **Example:** If you enter *'ab',* the field will populate with results containing *'ab'* **[2]**

6. COMPANY ADDRESS & LOGO

At any time, you can change the company name and logo by going to:

SETTINGS > ADDRESSES

7. ASSOCIATING REQUESTERS WITH FACILITY

The *Requesters* view under **Settings** allows you to associate requesters with facilities. To access the **Requesters** view, you must go to:

> ➢ **SETTINGS > COMPANY > REQUESTERS**

You can also create new requesters **[1]** and edit current requesters **[2]** in this grid view. A name is required for all requesters, but the email and phone number may be optionally added.
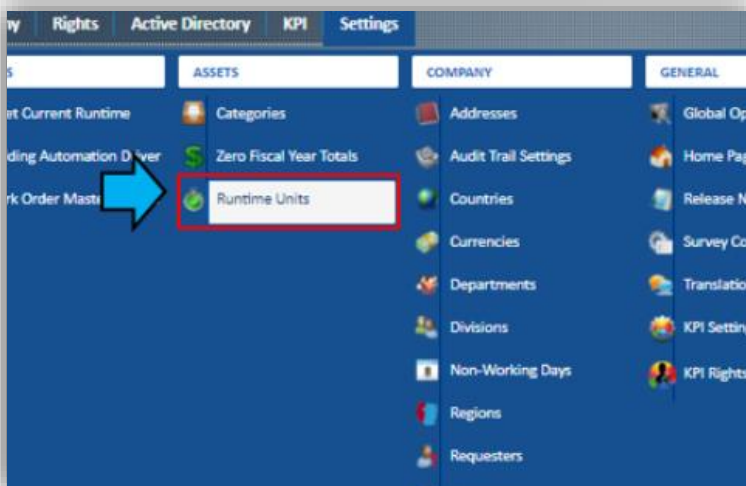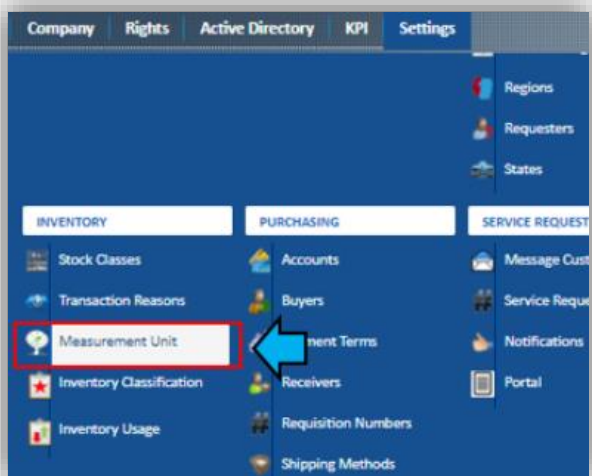
8. PARTS & ASSETS UNITS
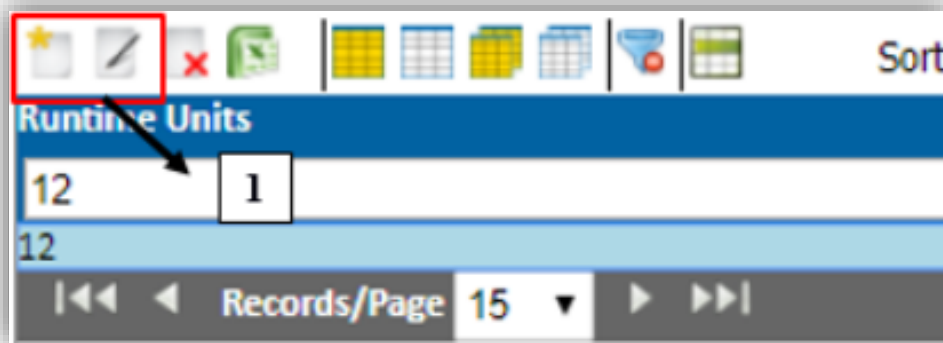
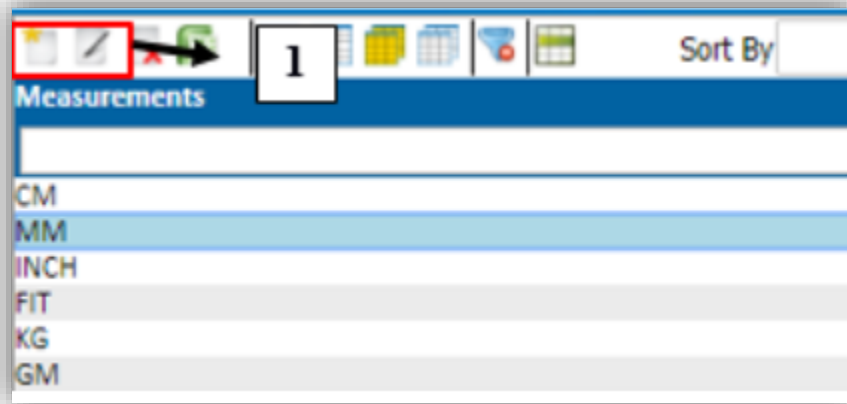Additional units can be added from the *Settings* menu.

TO ACCESS THESE FIELDS:

➢ **SETTINGS > INVENTORY > MEASUREMENT UNIT**
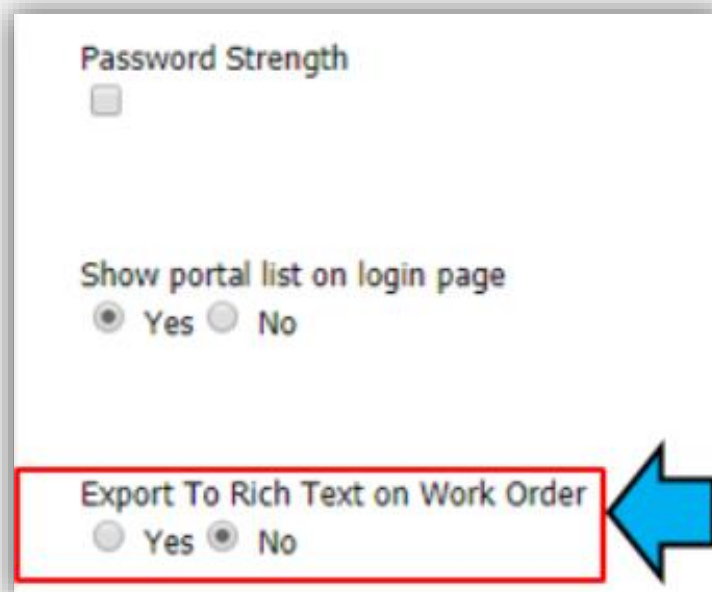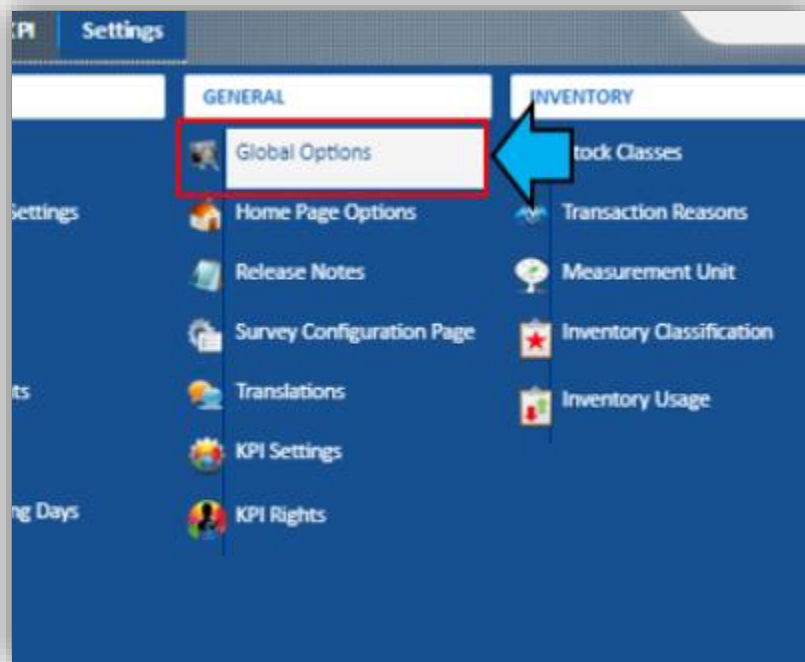
OR

➢ **SETTINGS > ASSETS > RUNTIME UNITS**

You have the option to create a new unit or edit a current unit **[1].** It is recommended that a standard is established.

Example: *HRS* for *Hours, HR, H, etc.*

9. PRINT SETTINGS

There is an enhancement in the *Print* functionality of the *Work Order* module. You're given the option to export work order to **rich text.**

If selected *YES,* then the work order will print in the *Rich Text Format.* If selected **NO,** the work order will print in the normal format.

10. MAINTENANCE TAG, SHE TAG & OPERATOR TAG

The Maintenance Tag, SHE Tag, and Operator Tag are in the *Service Request Portal,* under the *Settings* module.

TO ACCESS THE SERVICE REQUEST PORTAL

1. Go to the *Settings* module drop-down.
2. Scroll down the menu, and click *Portal*, under *Service Requests.*
3. Click the tag in which you desire to use.