

# ProTeus IV

## Features List

### GENERAL

- Highly optimized database performance.
- High transaction volume handling.
- Selectable Dashboard with Key Performance Indicators on initial program screen.
- Integrated with Microsoft Office 2000 (export ProTeus IV data to Word, attach binder files, etc)
- Multiple currency functionality.
- Multiple databases.
- FDA Validation support.
- Quick-launch to OSHA website for safety documents.
- Attach drawing files to records.
- Attach PDF files to records (optional).
- Quick Screens.
- Windows based interface (tabbed folder design, etc).
- Copy feature to copy records for reduced data entry.
- Import records into select ProTeus IV databases using the Data Import Utility.
- Help File.
- Request service from any PC on network using optional Service Request Module.
- Quick Search fields.
- Query Tool in most files. Ability to search on any combination of one or more fields for multiple character queries.
- Build and save queries.
- Reorder columns on Quicklists.
- Free-form text area in each record to include such things as safety notes, extended descriptions or notes.
- 8 user-defined fields in most modules.
- Ability to customize menu text, tab names, field and report names.
- Secured history files.
- Archive history data using Data Archive Utility.
- View archived data using History Viewer Utility.
- Ability to purge history files.
- Supports MS SQL, Oracle & MSDE databases
- Runs in Windows and operating systems supported by Oracle databases
- Single user & unlimited concurrent user versions available.
- Available in US English, UK English, Spanish, German, Hungarian, Portuguese, Simplified and Traditional Chinese

### SECURITY

- Individual and group security rights.
- Multiple group classifications.
- Backup and Restore tools.

### BUDGETING

- Create monthly labor budgets for each cost center.
- Create monthly materials budgets for each cost center.
- Print report comparing actual vs budgeted labor and material costs.

### CUSTOMER

- Track full address, including phone, fax, e-mail address and web address.
- Ability to launch browser to web address.
- Ability to send e-mail to address.
- Link customer to equipment.

### EQUIPMENT

- Attach multiple equipment to one work order.
- View equipment scheduled to be worked on via Scheduling Calendar.
- Option to remove equipment from service (stops PMs from activating).
- Equipment in/out of service viewer.
- Track equipment specs (rating, capacity).
- Track original purchase information.
- Link equipment to a customer.
- Assign vendor to equipment.
- Activate work orders based on runtime.
- Automated data entry via optional Barcode module.
- Automated data entry via optional integration modules.
- Create and view sub-assembly tree.
- View Bill of Materials.
- Track usage of repair parts.
- View PMs assigned to Equipment
- Cost history itemized by YTD, LTD, PM, DM, material, labor and totals.

### INVENTORY

- Track inventory parts in multiple stockroom locations.
- Move parts between stockrooms.
- Track part specs (size, shelf life).
- Track quantity on hand.
- Track quantity allocated to active work orders.
- Calculate quantity reserved.
- Calculate quantity available.
- Track quantity physically available.
- Track parts pulled from inventory.
- Track reorder point.
- Track economic order quantity.
- Track maximum quantity.
- Calculate quantity on order.
- Track last cost & date last purchased.
- Track unit cost, carrying cost, total cost.
- Physical count field.
- Assign multiple vendors per part.
- Store last PO number.
- Attach MSDS files.
- Update inventory via optional Barcode module.

### TRANSACTIONS

- Inventory adjustment.
- Track reason for adjustment.
- Check in/Check out.
- History log.

### TASKS

- Attach unlimited number of tasks to any work order.
- Reorder tasks in work orders.
- Assign tasks to specific work order cycles.
- Automatic, global update of tasks attached to work orders when modified.

### EMPLOYEE

- View employee workload via Scheduling Calendar.
- Maintain employee files associated with labor craft records.
- Track supervisor, department, and division.
- Track approval levels (PO and WO).
- Set maximum purchase level.
- Track full address, including phone, fax, pager, e-mail address and web address.
- Ability to send e-mail to address.
- Ability to launch browser to web address.
- Labor Craft module stores unlimited labor craft definitions.
- Assign multiple labor crafts per employee.
- Assign labor to specific work order cycles.
- Assign up to five rates per labor craft (regular time, overtime, etc).
- Set non-working days per employee.

### PREVENTIVE MAINTENANCE

- Separate PM Master & Active files.
- Multi-cycle scheduling reduces number of records, and number of work orders activating.
- Easy setup of annual, semi-annual, quarterly, monthly, weekly or daily PMs.
- Schedule by date, day of week, or particular week of the year.
- Schedule by usage (runtime).
- Schedule daily work order by start date or completion date
- Dynamic "Quick View" of future PMs for easier planning.
- Ability to skip a scheduled PM.
- Skipped PMs history files.
- Automatic activation and printing of work orders based on runtime totals using optional Building Automation System interface.

*More on back....*

### DEMAND MAINTENANCE

- Separate DM Template & Active files.
- Create work order in Active file.
- Assign cause.
- Automatic activation and printing of work orders based on alarm conditions using optional Building Automation System interface.

### WORK ORDERS (GENERAL)

- Automatic work order generation.
- Automatic daily work order printout.
- Send work order via email.
- Attach and reorder multiple tasks on a single work order.
- Assign multiple pieces of equipment to a single work order.
- Graphical, calendar view of entire work order schedule.
- Enter monthly budget estimates to track actual maintenance costs against budget.
- Assign cost center.
- Send work order notification through employee pagers via optional Service Request module.
- Assign labor code and estimated hours.
- Quick labor hours update via Time Card.
- Archive work order data into uneditable history files.
- Track originator.
- Track closed date.
- Track completed date.
- Track runtime information.
- Assign multiple tools.
- Assign multiple parts.
- Ability to reserve parts.
- Ability to pull parts.
- Display inventory details (unit cost, quantity available, etc.).
- Assign multiple employees.
- Track hours per rate for each employee.
- Track completed date for each individual employee/craft.
- Track work order approvals.
- Ability to manually activate.
- Ability to batch print.
- Ability to batch close.
- Quick close feature speeds work order closing by minimizing data entry.
- Batch Close Error Log.
- Print inventory "pick list".
- Ability to customize work orders using Crystal Reports.
- Downtime tracking.
- Update labor hours and parts used via optional Barcode module.

### SCHEDULING

- Set company working days, plant shutdown days.
- Multi-cycle scheduling.
- Assign parts, tasks and tools to a specific cycle or all cycles.
- Graphical, calendar view of work order schedule.
- Navigable tree-view of work order schedule.
- Displays PMs and/or DMs.
- View work order by year, month, week, or day.
- View by equipment, employee or job number.
- View future PMs.
- Reschedule work orders.
- Ability to print work order from calendar.

### VENDORS

- Track full address, including phone, fax, e-mail address and web address.
- Launch browser to web page.
- Ability to send e-mail to address.
- List/link to vendor's equipment.
- List/link to vendor's parts.
- Track YTD and LTD purchase history.
- Purchase order activity report.

### PURCHASING

- Create purchase orders for inventoried parts.
- Create purchase orders for non-inventory parts.
- Close purchase orders.
- Reorder list of parts.
- Reorder--Ability to query list.
- Reorder--Ability to list only parts by default vendor.
- Auto generate requisitions from selected reorder items.
- Track PO details.
- Assign Blanket POs with expire date, dollar amount; automatically decrements dollars remaining.
- Line item G/L number.
- Display reorder list and vendor list to drag and drop to line items list.
- Track approvals.
- Track tax and shipping costs.
- Assign ship-to location.
- Ability to customize purchase orders using Crystal Reports.
- Track shipments and receipts.
- Separate receiving and history log.
- Track packing slip & invoice number.
- Track whom received by.
- Ability to zero fiscal year totals.

### RECEIVING

- Close purchase orders.
- Track receipt of items purchased from Purchasing module.

### REPORTS & GRAPHS

- 100+ standard reports.
- Advanced reports.
- 3-dimensional bar, line, and pie charts graphs.
- Customizable dashboard can display any report, including Key Performance Indicators.
- Key Performance Indicator reports can automatically launch upon startup.
- Unlimited user defined selection filters.
- Ability to customize reports using Crystal Reports.

### OPTIONAL MODULES

- Barcode Module.
- PM Tasks Module (Tasks Library).
- Service Request Module
- ProLink Web Browser Service Request Module.
- PDF Documentation Support Module.
- M-Site Module (for accessing multiple databases).
- Audit Trail Module.

### AVAILABLE INTERFACES

- Crystal Reports® for report customization.
- Microsoft Project®.
- PDA (Palm OS).
- Vykon™ controllers from Tridium.
- IA Series® from Invensys.
- Talon™ controllers from Siemens-Staefa.
- WEBS™ controllers from Honeywell.
- CarrierOne™ from Carrier.
- Metasys® systems from Johnson Controls.
- Trane Tracer Summit®.
- Most BACNet® protocol systems.
- Wonderware® Process Control.
- Enterprise Resource Planning (ERP) Systems.

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