



Enterprise/Professional Training Outline

Introduction to ProTeus

Getting Started

- Overview of Icons
- Overview of Menu Options
- Overview of Terminology
- Creating, Modifying and Saving Records
- Navigation Techniques
- Introduction to queries
- Discuss standardization of data fields
- Develop numbering schemes

Data Entry

- Overview of Data Entry Techniques
- Editing Drop-down list boxes

Master Files

- Vendors
- Customer
- Ship to Addresses
- Multi-Currency Manager
- Blanket P.O.
- Stockrooms
- Inventory
- Equipment
- Labor Craft
- Employee
- Tasks
- Causes
- Cost Center Manager



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Enterprise/Professional Training Outline

Demand Maintenance

Demand Maintenance (DM) Template

- Data Entry
- Change Labor Function
- Change Equipment Function
- Activation
- Printing

Demand Maintenance (DMA) Active

- Creating a DMA Work Order
- Assigning Labor, Parts, Tasks, Tools, etc.
- Assign To Function
- Change Labor Function
- Change Equipment Function
- Printing
- Printing a Pick List for a DM Work Order
- Updating Causes
- Closing a DMA Work Order
- Viewing DM History
- Viewing Equipment Cost History

Preventive Maintenance

Preventive Maintenance (PM) Master

- Data Entry
- Assigning Labor, Parts, Tasks, Tools, etc.
- Scheduling
- Required Fields
- Change Labor Function
- Change Equipment Function
- Activation
- View Schedule

Preventive Maintenance (PMA) Active

- Data Entry
- Printing
- Printing a Pick List for an Active PM Work Order
- Updating details for an Active PM Work Order
- Assign To Function
- Change Labor Function
- Closing PM Work Orders
- Viewing Preventive Maintenance History
- Viewing Equipment Cost History





Enterprise/Professional Training Outline

Scheduler

- View current work orders
- View upcoming work orders
- Printing schedules and work orders
- Reschedule work orders
- Resource assignment

Time Card Feature

- Update PM Labor
- Update DM Labor

Purchasing and Inventory Control

Inventory Control

- Move Stock
- Move Ticket History
- Reorder List

Purchasing Master File

- Data Entry
- Attaching Vendors
- P.O.'s and BPO's
- Releases and Conditions
- Parts on the Fly, Vendor on the Fly
- Non-stock parts
- Amendments
- Approvals
- History

Receiving Log

- Data Entry
- Recording shipments
- Inventory reconciliation
- Amendments
- Closing a P.O.
- History

Transaction Log

- Data Entry
- Adjustment type
- Creating Transactions
- History





Enterprise/Professional Training Outline

ProTeus Reports

- ProTeus Standard Reports
- Queries
- Printing
- Exporting
- Custom Reports

Administrator and Miscellaneous Program Functions

Miscellaneous Program Functions

- Other Menu
- Group Rights
- Work Order Approvals
- Changing Passwords
- Import Utility
- Field Name Changes

Archive History

- Archive History Data
- Viewing Archived Data
- Printing Archived Data Reports
- Purging



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