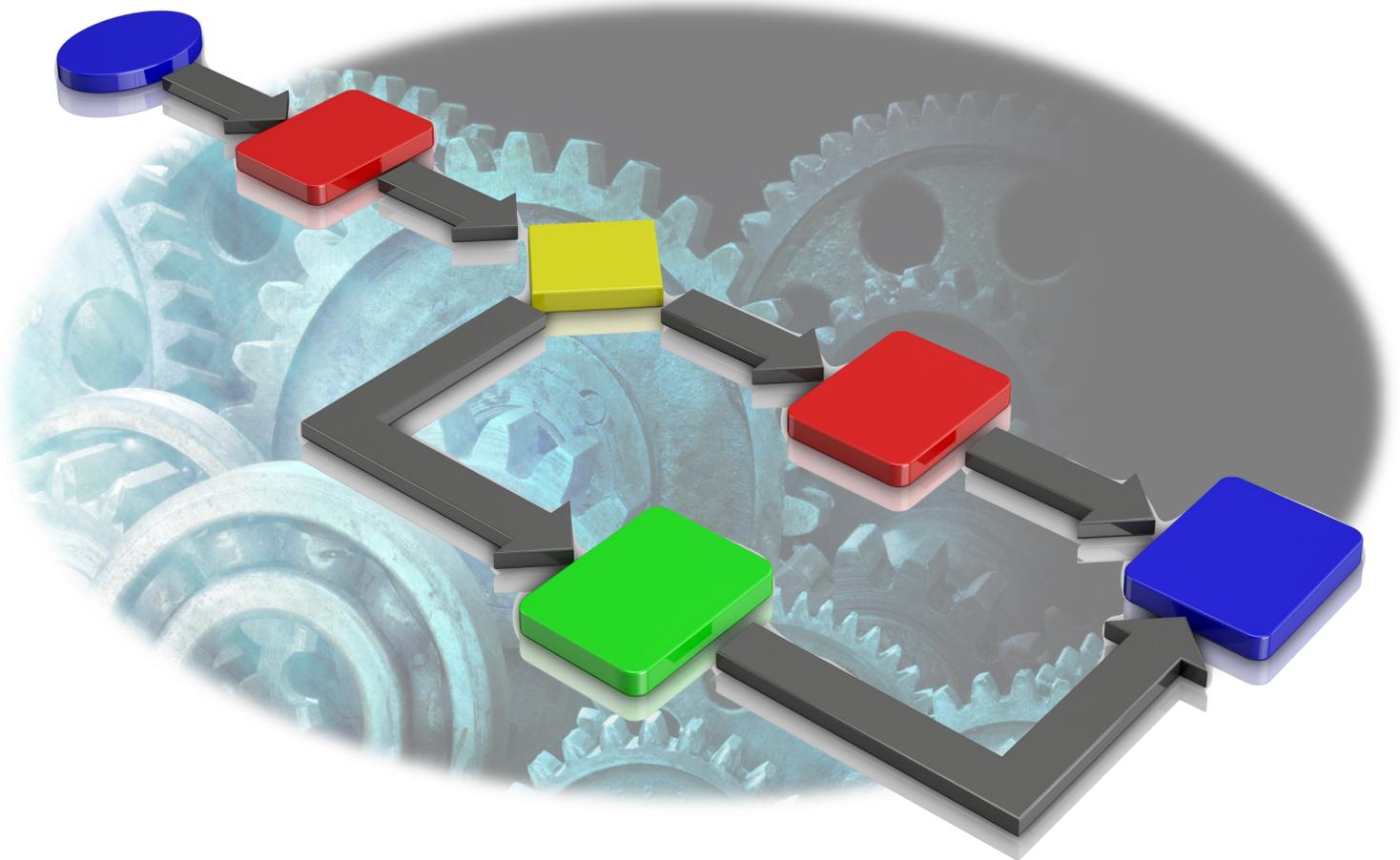

Protean 7.3



FR4 Release Notes

Protean Field Service Management System 7.3.4525

September 2018



Notice

The content in this document represents the current view of Protean Software Ltd as of the date of publication. Because Protean responds continually to changing market conditions, this document should not be interpreted as a commitment on the part of Protean. Protean cannot guarantee the accuracy of any information presented after the date of publication.

© 2018 Protean Software Ltd. All rights reserved.

Information in this document is subject to change without notice.

Contents

SECTION 1– OVERVIEW.....	3
1.1 - Document Purpose.....	3
1.2 - Background.....	3
1.3 - Documentation.....	3
1.4 - Licensing.....	3
1.5 - Supported Operating Systems & Platforms.....	3
SECTION 2 - WHAT'S NEW IN THIS RELEASE.....	4
2.1 - Inspection Workflows.....	4
2.2 - Mandatory Inspection Attributes.....	8
2.3 - Sage 200c Support.....	9

SECTION 1 - OVERVIEW

1.1 - Document Purpose

This document provides the feature information for the FR3 release of Protean 7.3 (7.3.4525) by Protean Software Ltd

1.2 - Background

This update incorporates several enhancements requested by customers. It forms part of the standard release schedule set down by Protean Software Ltd to keep Protean 7.3 current & offer increased functionality to the customer base as well as to attract new customers.

1.3 - Documentation

Further product documentation is available within the help system for Protean and from the Protean help website (support.proteansoftware.co.uk).

1.4 - Licensing

There are no licensing implications for Protean 7.3 resulting from this release.

1.5 - Supported Operating Systems & Platforms

1.5.1 Protean (Office)

Protean will operate on the following operating systems:

Windows 7, 8, 8.1 & 10

Windows Server 2008 and above

Terminal Services & Citrix supported

1.5.2 Protean (Mobile App)

Protean Mobile will work on any device running the Android operating system, v4.4 (KitKat, 2013) and above (currently latest version is v9 Pie, 2018). The device will also need a SIM card to support mobile internet & a appropriate data plan. Consideration should also be given to a rear-facing camera if engineers might be required to capture photographs on site.

SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1 - Inspection Workflows

Protean have introduced the ability to connect Inspection Templates together into workflows of various complexities. This means that users can create templates that are conditional, based on the answers given by engineers via the mobile app, and are only added to the job, or item of equipment, when needed. In other words, rather than having to create large, unwieldy Inspection documents to cover all eventualities you can pre-load the job (or equipment) with a short set of general questions and if the appropriate answer is selected by the engineer a further set, or sets, of questions can be uploaded to the mobile device automatically. In this way many different workflows can be constructed using the same inspection components.

2.1.1 Set Up

All set up is carried out on the Inspection Template screen (System/Inspection/Templates) to give maximum flexibility when creating workflows.

To add a dependant template to a particular Inspection Code against an Inspection Attribute, simply open the template and highlight the appropriate Inspection Category. The Inspection Attributes will appear in the right-hand window.

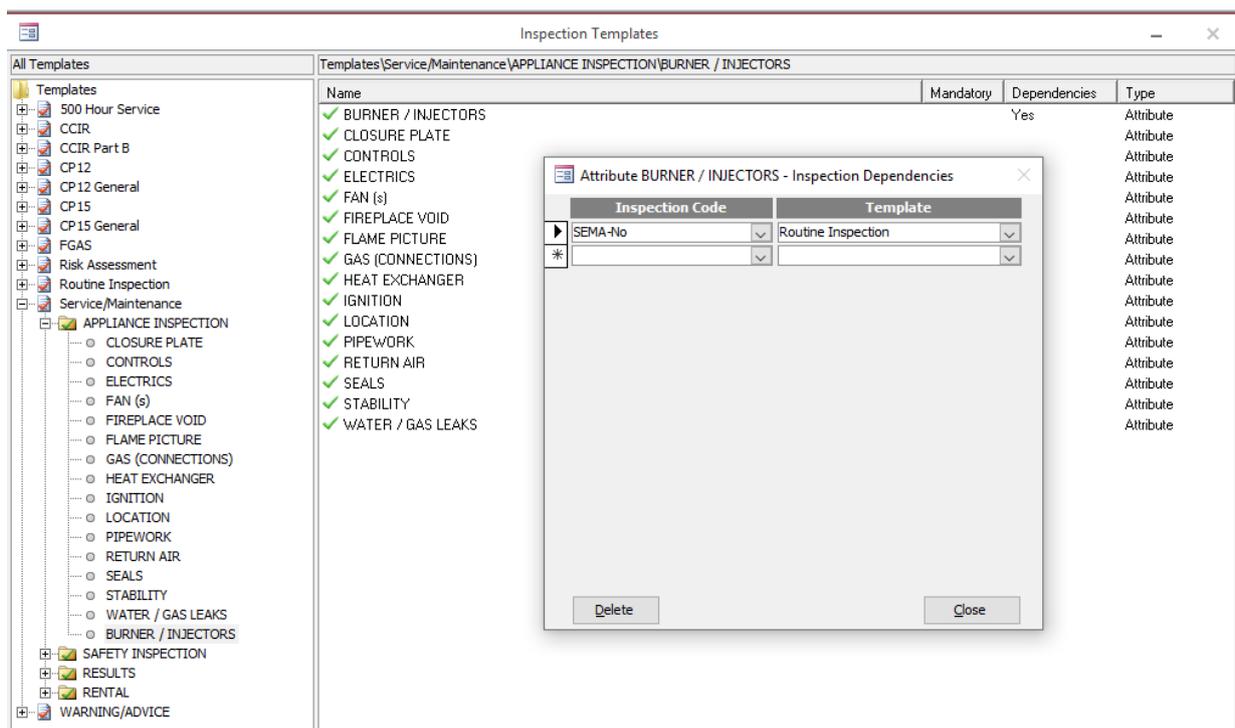
Locate the Attribute you want to create the workflow under and right-click it. A small menu appears.

Select 'Dependencies'.

A window opens with two columns - Inspection Code & Template. Select the Inspection Code in the first list that triggers the dependant template. Then select the correct Inspection Template to be added. Templates can be added to all allowed Inspection Codes for this Attribute it required.

Click 'close' to return to the Inspection Template screen and you will see 'Yes' in the Dependencies column to indicate that a dependency exists for that Attribute.

NB Note that a full sync must be run on the mobile app if dependencies have been added or amended in the office before they can be used by the engineer.



SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.1.2 Mobile App Operations

Note that Inspection Workflows are set up and maintained of the office system but are used only on the mobile app. Dependency functionality is not supported in the office system for manually completed Inspections.

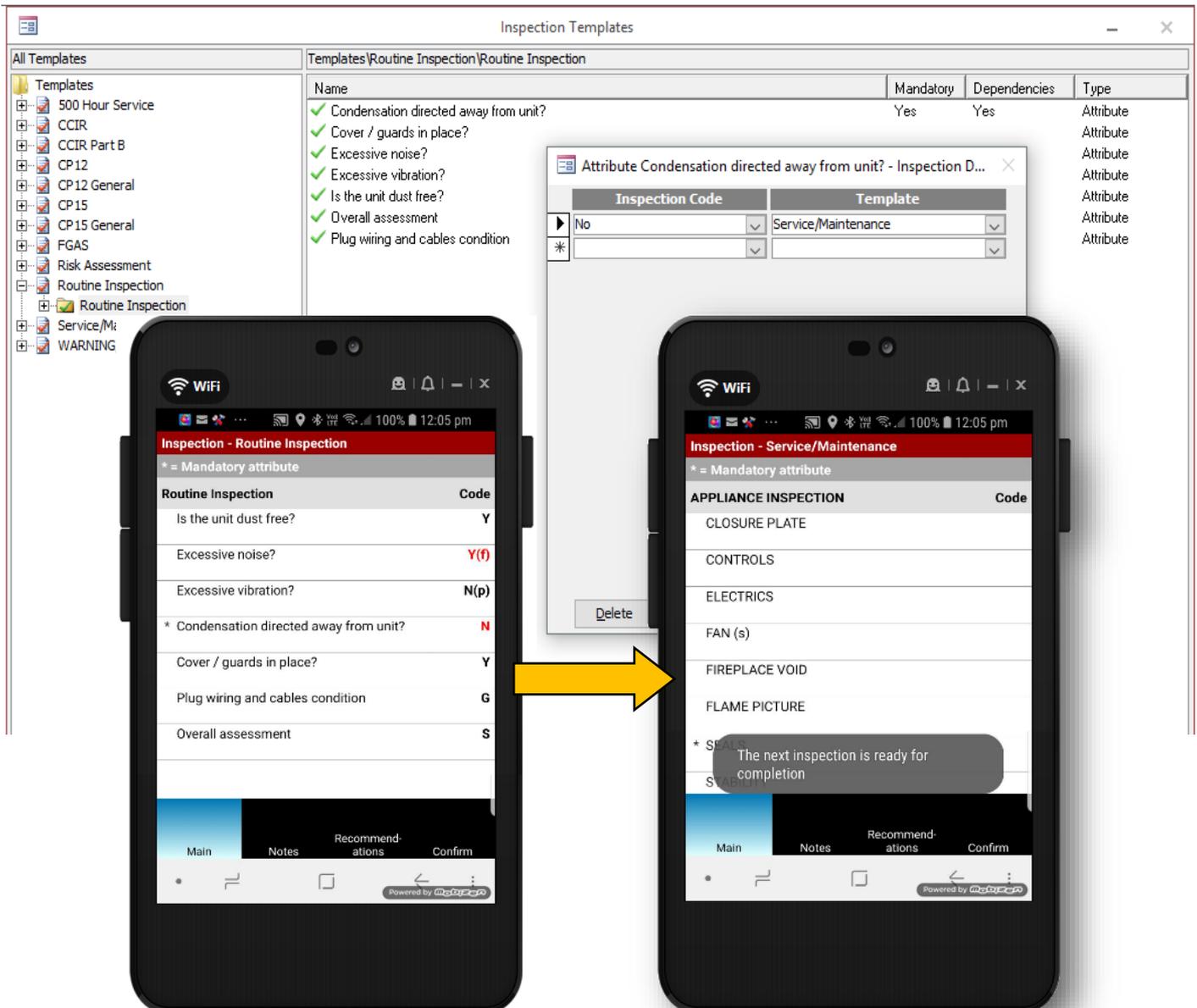
Inspections can be added to the Job or at Equipment level as normal.

When the engineer completes & confirms an Inspection of any type the system checks the chosen responses (Inspection Codes).

If a Code has been chosen that triggers **one** dependent Template to be added then a message is displayed "The next inspection is ready for completion" and the engineer is taken straight into the new Inspection automatically.

If Codes are chosen that trigger **multiple** new Templates to be added then the engineer is shown the list of Inspections to be completed and can there choose which one to finish next.

NB The system will not download duplicate Inspection Templates to prevent creating user clarity & data issues



SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.2 Mandatory Inspection Attributes

Prior to this update users could choose the mandatory nature of Inspections at the company level, choosing between two options - 'Must Complete' & 'Allow Partial Completion' in General Settings. Now, this has been de-veloped down to individual Inspection Attributes on a per Inspection Template basis ie an Inspection Attribute can exhibit different behaviour on different Templates. This allows users complete control over which Attributes need populating on a Template and which can be left blank.

2.2.1 Set Up

All set up is carried out on the Inspection Template screen (System/Inspection/Templates) to give maximum flexibility when selecting mandatory attributes.

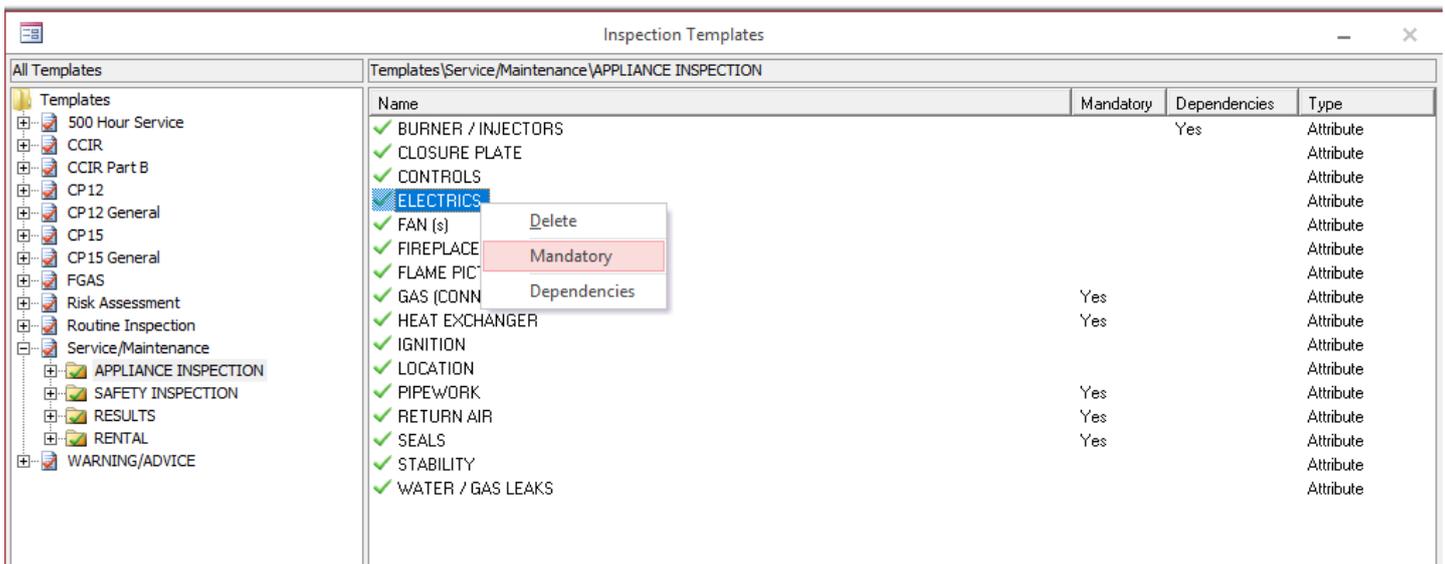
To set an Attribute as mandatory simply open the relevant template and highlight the appropriate Inspection Category. The Inspection Attributes will appear in the right-hand window.

Locate the Attribute you want to flag as mandatory and right-click it. A small menu appears.

Select 'Mandatory'.

You will see 'Yes' appearing in the Mandatory column to indicate that this has been configured for that Attribute.

NB If the general setting is set to 'Must Complete' then this is still respected and will override any set up done in the Inspection Template screen.



2.2.2 Office Operations

If you complete Inspections in the office (rather than on the mobile app) the mandatory flag is shown against the Inspection Attribute and requires a user to enter a value against the Attribute before allowing completion of the Inspection.

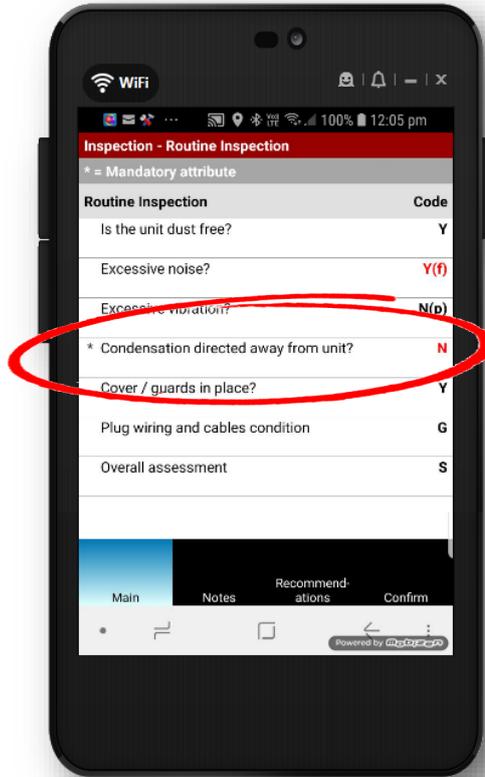
Category	Attribute	Mandatory	Code	Notes	Req
APPLIANCE INSPECTION	GAS (CONNECTIONS)	<input checked="" type="checkbox"/>			<input type="checkbox"/>
APPLIANCE INSPECTION	HEAT EXCHANGER	<input checked="" type="checkbox"/>			<input type="checkbox"/>
APPLIANCE INSPECTION	IGNITION	<input type="checkbox"/>			<input type="checkbox"/>
APPLIANCE INSPECTION	LOCATION	<input type="checkbox"/>			<input type="checkbox"/>

SECTION 2 - WHAT'S NEW IN THIS RELEASE

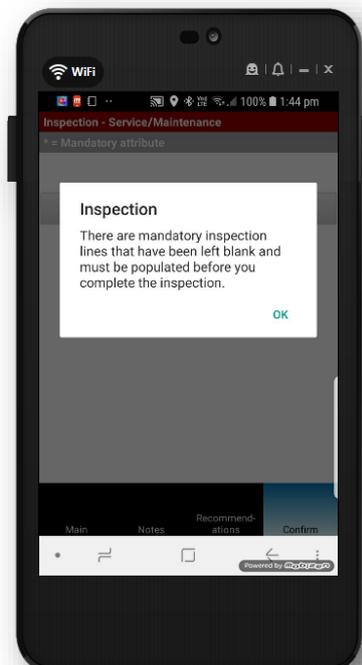
2.2.3 Mobile Operations

Inspections can be added to the Job or at Equipment level as normal.

When an engineer opens as Inspection on the mobile app any mandatory attributes are marked with an asterisk.



If a user attempts to complete an Inspection without populating all of the mandatory attributes then a message is displayed informing the user. They can then return to the 'main' tab to enter values for those Attributes.



SECTION 2 - WHAT'S NEW IN THIS RELEASE

2.3 - Sage 200c Support

The latest incarnation of Sage 200, with its data in the cloud, is now supported in Protean.

FR4 has been tested on & passed for the 2017, Spring 2018 & Summer 2018 editions.

