Protean 7.3 – Engineer PDA
User Guide

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Downloading and installing the mobile app

Before use, the protean app must be downloaded and installed on the android device. To do this:-

1.   Open the web browser on the device and go to the webserver IP address followed by /ProteanPDA/Client (e.g.
                192.168.0.113/ProteanPDA/Client).

2.   You will then be presented with the following screen; tap the 'Download' button. Once the download has completed click on the file 'ProteanEngineerPDAClient.apk', this can be found in the notification area at the top of the screen.

3.   Click 'Install' then click 'Open'. You should now be presented with the following screen and message.

Note: the device make ask you to allow 'non-market applications', follow the on screen instructions**

Application Setup

Once the application has been installed and you are presented with the screen shown on the previous page, follow the steps below:

1. Tap 'Protean Server Address' and type in the webserver IP address (e.g. 192.168.0.113) and then tap 'OK'.
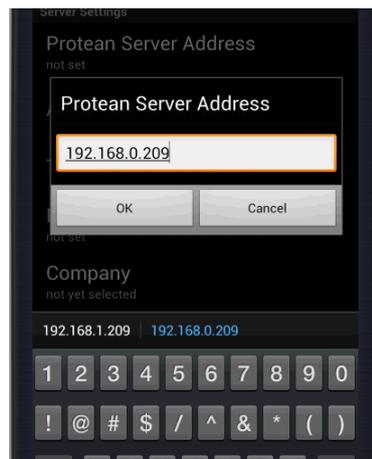
2. Tap 'Advanced Server Details' and enter the correct port number, if you are using SSL ensure the 'Encrypt Communications' boxed is ticked. Tap the back button to return to the settings screen.

Click 'Test Server Connection' – After the connection is tested ensure that the following text is displayed before proceeding.

3.

Protean web service was successfully contacted.

Network Status Test Passed
Web Access Test Passed

4. Return to the settings page and tap 'PDA Name' and type in the PDA Name that is unique to the user (e.g. POCKETPC_2, PDA_1 etc.) and then tap 'OK'.

5. Tap 'Company' and select the live company and then click 'OK' and return to the login screen.

Using the App

The screenshots featured below are for illustration purposes only and the button layout and appearance may differ slightly depending on the device you are using.

Logging in

First launch the Protean App. To do this locate the Protean icon and press it once.

You will be taken to the log in screen. To identify you on the Protean system you will must log in using your own User Name and PIN code.

Tap the User name field to launch the on screen keyboard and enter the details provided by your system administrator.

Press the done key once complete and then use the on screen number pad to enter your PIN.

Then press the 'Log In' button shown at the bottom of the screen.

If you have entered an incorrect user name or password the below warning will appear.
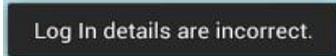
If this happens, please confirm your User Name and PIN with your system administrator.

If your device is unable to contact your protean server a warning will appear in the notification bar at the top of the device screen.

If this happens please check that you have the correct user name and PIN and that your device has internet connectivity.

Once you have done so, you will be taken to the Main Menu.

Depending on the device being used, a series of additional buttons will be available at the bottom of the screen. These will either appear on the screen itself or (as with the example shown) may be physical or electrostatic controls located below the screen. Buttons used within the Protean app are described below.

 The menu button will normally appear similar to one of the images to the left and can be used to access additional options both on the log in screen and elsewhere in the app. This is also the key the user should tap in order to logout and to exit the app.

 The back button appears as a U-turn type arrow placed on its side and is used to navigate back to a previous screen. This can also be used to close the on screen keyboard.

Logging out

To Log out, press the back button until you reach the main menu. Press the back button again and you will be prompted to log out.
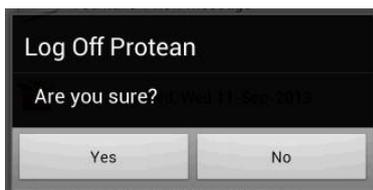
Confirm you wish to log off and the app returns to the log in screen.

From the log in screen, press the menu button. Three additional options appear at the bottom of the screen. Tap the Exit button to leave the app.

Automatic synchronisation will continue in the background and the device will continue to display notifications when this occurs.

Main Menu

Once you have logged in you will see the main menu. The menu consists of 4 (or 5 if using timesheets) options.
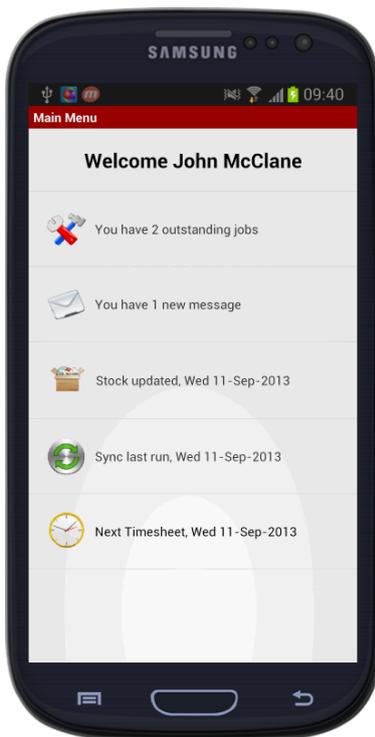
Jobs -The first option displays the number of jobs that are currently outstanding. Tapping this option will take you to the jobs screen.

Messages - The second options displays the number of unread internal messages and when tapped will take you to the internal message inbox.

Stock - The third option is used to access the Parts/Stock enquiry screen, the option also shows the date on which the stock was last updated with information from the Protean Server.

Sync - The fourth option is used to perform a full synchronisation and also shows the date this was last carried out. A full synchronisation is necessary when configuration changes that have been made on the Protean server need to be communicated engineers devices.

Timesheet - If Timesheets are in use, the fifth option allows the engineer to submit a timesheet for the day and displays for what date the next timesheet is due.

Jobs

Outstanding and current jobs are shown after tapping the Jobs Icon on the home screen. All current jobs are shown and by default are ordered by date with the earliest first. Each time a new job is received a notification is sent to the device to alert the engineer.

For each job, the following information is shown:
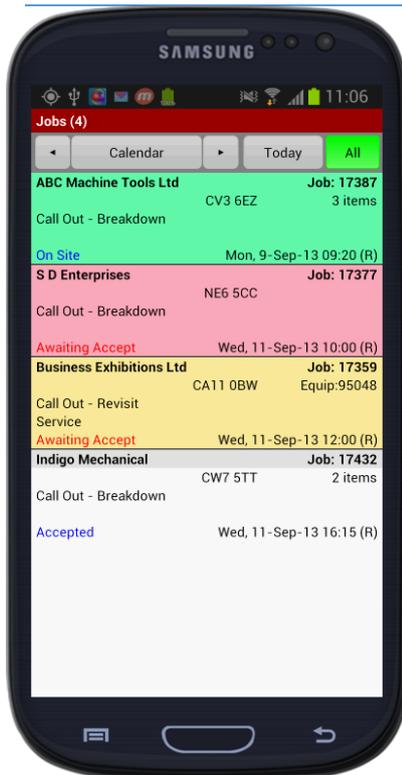
- Customer
- Protean Job number
- Site postcode (This field may instead show the Town in which the site is located).
- Number of items of Equipment on the job.
- Job Type
- First line of content from the 'To Do' section of the job
- Date job has been scheduled for
- Status
- Timing /Schedule type - This appears as a letter in brackets to the right of the date and time of the appointment.

o **(R)** - Signifies a job time based on the systems **Response Time** to the report of the problem. o **(S)** - Signifies a job that has been **Scheduled** in o **(A)**- Signifies a job whose time and date have been **Arranged** with the customer.

Possible job statuses are:

o Awaiting accept o Accepted o En-route o On site

o Complete

Jobs are colour coded depending on when they are due. The colour coding is as follows:

Red – Overdue, having been scheduled for a date/time in the past.

Green – The job currently being worked on.

Amber/Yellow – Due within the next hour. **White**

– Scheduled, but, not yet due.

By default, all current jobs are displayed, the job list can be date filters using the options at the top of the screen.

Calendar – Allows user to choose a date and display jobs only for that date.

Today – Shows only today's jobs. **All**

– Shows all current jobs.

Additional options are available by pressing the menu button. This will display a list of submenu items at the bottom of the screen.
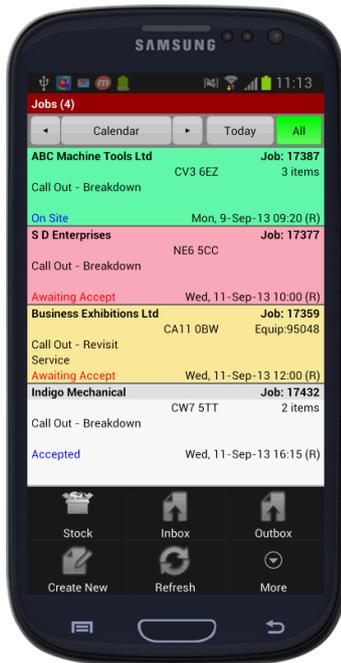
Stock - This will take the user to the parts search screen (See 'Stock' section P.37).

Inbox - This will take the user to the messages inbox (See 'Messages' section P.34).

Outbox - Takes the user to the messages outbox (See 'Messages' section P.34).

Create New - Allows the user to create a new Activity, job or Message.

Refresh - Causes the app to resynchronise its job data with the Protean server. The app will synchronise with the Protean server at pre-defined intervals, the refresh option forces this to happen when tapped.
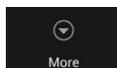
More -Allows the user to change the sort order for jobs, to sort by Post Code, Site, status etc. as well as define whether or not completed jobs are displayed in the jobs list.

To begin working with a job, tap the entry in the job list. The user is presented with a popup menu displaying the options relevant to the selected job.
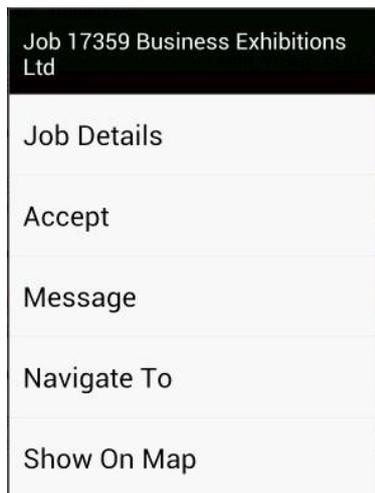
These options are contextual and the list presented to the user will depend on the current status of the job. Possible options displayed in this list are as follows.

• **Job details** – View details of the selected job.

• **Start Travel -** Allows the user to record the start of travel to a job (see 'Start Travel (optional) p.15).

• **Cancel Travel** – Cancel the travel to a job (see 'Cancel Travel' p.16). ☐ **Accept** – Accept the selected job and notify Protean of ETA ☐ **Complete** – Complete a job when done.

• **Message** – Send an internal message regarding the job (see 'Messages' section p.34).

• **Navigate to** – Use Google Maps to navigate to the job (see 'Start travel (Optional)' p.15 – This function will also work with other navigation software if it is installed on the device).**Show on Map** – View the site location via Google Maps (see 'Start travel (Optional)' p.15).

Processing a job

Job details

Once the Job submenu is tapped, Job details is the first option on the list of available actions. Tapping this option takes the user into the job itself, allowing them to view details of the job provided by the office.

Once accessed the user can navigate between areas of the job using the buttons at the bottom of the screen. The currently selected area is highlighted in blue

Site

This is the default area of the job the user is taken to when the job is accessed. The screen displays the following information about the site.
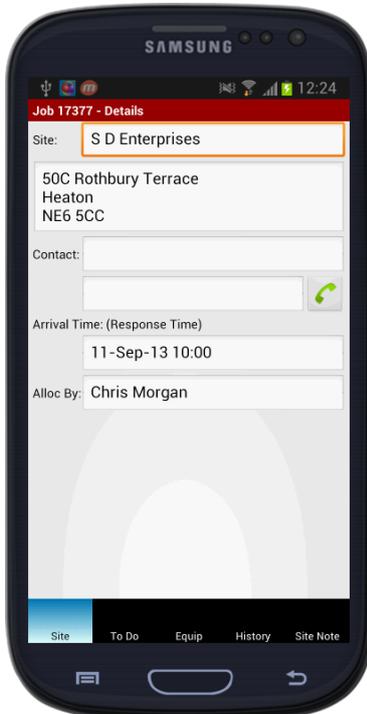
Site name – Name of the site the job is located at.

Site address – Address of the site at which the job is located, tap and hold the address to be given the option to view the location on a map or to launch Google's navigation feature in Maps to direct you (This function will also work with other Sat Nav software if installed on the device).

Contact – Name of contact at that site.

Contact telephone - Telephone number for the on-site contact. The user can tap the green telephone icon to call the contact from the app itself.

Arrival Time (Response Time) – The arrival time that has been scheduled on the job. This field may also display (Scheduled) or (Arranged) depending on the schedule type set against the job.

Allocated by – The user who allocated the job to the technician.

To Do

This areas contains details on the job itself. And displays the following information

- **Type** – the job type set on the job and whether the job is chargeable.
- **Fault** – The fault selected against the job from the Fault, Cause and Action list (not available if the job is a multi-equipment job).
- **Order No.** – The Purchase Order number provided by the customer and entered on to the job.
- **To Do** - The contents of the 'To do' section of the job.
- **Target Duration** – Time based on that input when scheduling the job.
- **Attachments** – Job attachments can be viewed through the attachments button. By tapping the attachments button, all attachments on the job will be displayed. These can be downloaded individually by clicking on each respective item.

Equip

The Equip tab contains the details of the pieces of equipment which are listed against the job.

If the selected job is a single equipment job, then tapping the 'Equip' option will display information relating to the equipment on the job. There are differences depending on whether the job is a single equipment job or a multi equipment job.

Single Equipment Jobs

If the job is a single equipment job, then tapping the 'Equip' button will display information relating to the piece of equipment that has been added to that job. The information displayed is as shown below:

- **Our Equip No.** – Protean held equipment number for the piece.
- **Customer Equip no.** – Customers equipment reference.
- **Make** – Manufacturer of item.
- **Model** – Model of Item.
- **Serial No.** – Items serial number.
- **Type** – Sub type as part of make/model.
- **Location** – Location equipment is sited at.
- **Meter Reading** – Last meter reading taken.
- **Last serviced** – Last serviced date.
- **Attributes** – Attributes attached to the equipment are viewable by clicking the open book icon.
- **Category 1 and Category 2** – These are user defined fields and can' be used to hold pieces of information that are not held as standard.

Where the job is single equipment, a **'History'** button is visible at the bottom of the screen to the right of the 'Equip' button. Clicking here displays any history recorded against that piece of equipment. The amount of history that is displayed here can be amended in the Protean server settings.

If there is no equipment allocated to the job, then this screen is still accessible, but, contains no details.

Multi Equipment jobs

When the selected job is a multi-equipment job, the 'Equip' button, when tapped, displays a list of equipment on the selected job.

Each entry in the list shows basic information about the item, including Make, model and equipment numbers. O/S will also appear in this section to indicate whether or not work on that piece of equipment is still outstanding.

Pressing and holding on one of the equipment entries presents the user with a popup from which both the **history** and **attributes** for the selected piece of equipment can be viewed.
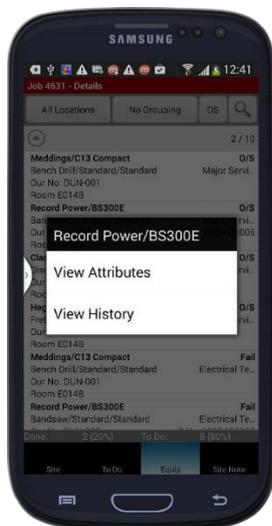
Additional filters are provided at the top of the screen to allow the user to more easily manage the list and locate individual pieces of equipment within the list of equipment on the job.

Location – Defaulting to all locations, tapping this option allows the user to choose a particular customer location at which equipment located.

Grouping – Defaulting to no grouping, changing this filter will group together equipment based on the option chosen at this stage.
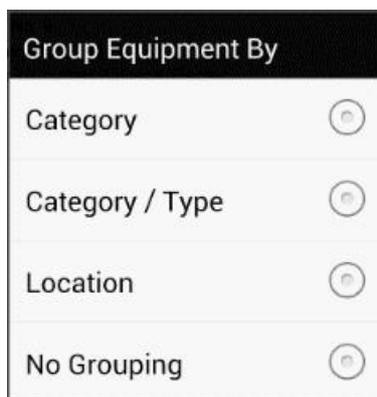
Category – Equipment will be organised based on its category with those of the same category appearing together.

Category/Type – Equipment will be arranged by category and type.

Location – Equipment will be grouped by location.

No Grouping – No grouping is applied and equipment is listed in order of equipment no.

OS – When tapped this buttons colour will change to green and only equipment that is still outstanding will appear in the list.

Search (Magnifier) – This allows a specific piece of equipment to be searched for based on criteria the user can specify, the following fields can be searched against, either individually or in combination.

- Make
- Model
- Serial Number ☐   Equipment Number ☐   Customer Equip no.

In addition, if barcode labels are in use, for Serial number, equipment number or customer equipment number, these can be scanned directly from the device, rather than the label number having to be type in.

To do this, tap the barcode/scan icon to the right of one of the above fields. If you have not used this feature before you may be asked to download 'Barcode Scanner' from the Google Play store. This app is free, but, is a prerequisite to using the barcode scanning in Protean and should be installed before you proceed.

Once installed, then the app will launch the barcode scanner.

Place the devices camera in view of the barcode and the app will automatically attempt to process the barcode.

Once recognised, the coded number will be input into the field you selected to scan and the app will search for that piece of equipment. If found the user will be presented with the equipment record that has been returned, otherwise a messages is displayed to notify the user that no equipment could be found. The scanner also supports QR codes (2D barcodes) and these can be scanned in the same way as a normal barcode.

History

This option is only visible when the selected job is single equipment (see 'Single Equipment jobs' p.13 or Multi-equipment jobs' p.13 for more information about equipment history and how to find it).

Site notes

The site notes option allows the user to view any notes that have been added to that site. These could be helpful in establishing where to gain access to a site or to notify users of anything else that might be useful when attending site.

Accepting a Job

Once a job has been received, accept the job. From the job 'Accept'.

to acknowledge this, the user must screen, tap the job entry and then tap

The app then prompts for an estimated time of arrival.

Choose or confirm the date and the time you arrival on site is expected. Tap OK.
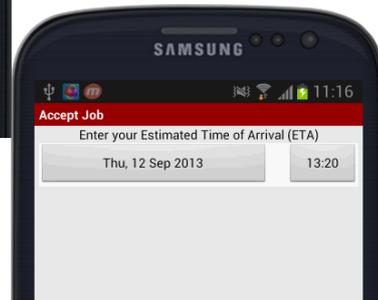
The status of the job on the device will change from 'Awaiting Acceptance' to 'Accepted'.

Start travel (optional)

Once a job has been accepted and an ETA entered, two additional options are available from the popup menu shown when a job is selected, the first is 'Start travel'.
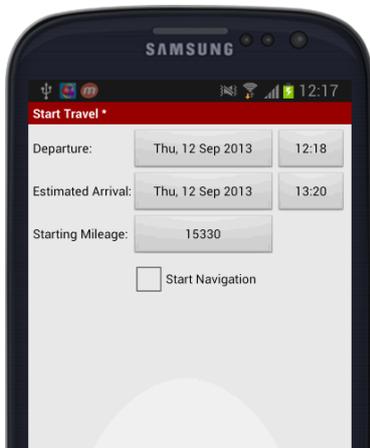
1.   Navigate to the jobs screen, tap the job you wish to travel to.

2.   Tap 'Start Travel'.

3.   Enter a departure date and time.

4.   The ETA set when the job was accepted can be update at this stage.

5.   Starting Mileage - enter the start mileage for the trip to the job. This would be necessary if billing the customer for travel mileage.

6.   If the 'Start Navigation' option is checked at this point, then when the 'OK' button is tapped, the application will launch Googles navigation function on the device.

7.   The jobs status is set to 'En-route' and its colour is changed to green.

Note: Starting travel is optional as at this point it is also possible to tell the job that you have arrived on site**

Cancel travel

In the event that you are unable to complete the journey to the site, the travel to site can be cancelled.
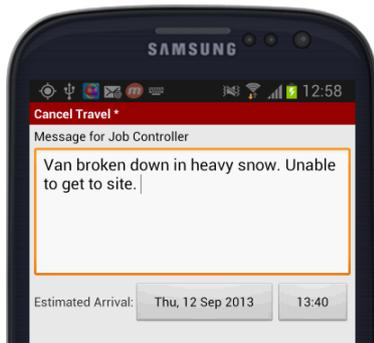
1. Navigate to the Jobs Screen.

2. Tap the job that is currently on 'En-Route' status.

3. Tap 'Cancel Travel'.

4. You can enter the reason for cancelling the journey by using the on screen keyboard.

5. It is also possible to enter a new ETA.

6. Tap 'OK' – The job status will now be 'Accepted'.

Note: It is advised that this information be sent immediately, this can be done from the Job List screen by tapping the menu key followed by 'Refresh', forcing an immediate refresh.**

Arrive on site

The time an engineer arrive on site can also be recorded, this will update the travel time on the job and change its status to indicate that the engineer has arrived.
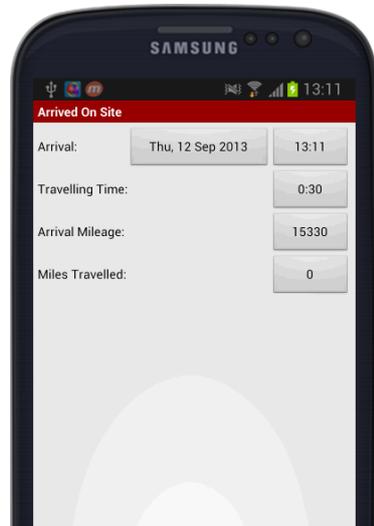
1. Navigate to the Jobs Screen.

2. Tap the job that is currently on 'En-Route' status (you cannot be En-route to more than a once job at a time).

3. Tap 'Arrive On Site'

4. On opening, the screen will display the arrival date and time (this is generated by the current date/time held by the device).

5. The travel time is also calculated by the device based on the start and arrival times.
Any changes made to the arrival time will be reflected in the calculated travel time.

6. If a Start mileage was entered this will be displayed and should be changed to the mileage on arrival, this will calculate and display the miles travelled.

7. Tap 'OK' – The job status will now be 'On Site'.

Note: If an upfront inspection has been added to the job, upon tapping 'Arrive On site' the user will be required to complete the upfront inspection. For more Information see 'Up Front Inspections' p.36**

Completing a job

There are two methodologies for assigning jobs to engineers available with the Protean software, single equipment jobs and multi equipment jobs. This next section of the guide will cover both methodologies separately as the screens can be significantly different.

Single equipment jobs

Once on site, or on completion of the job, details of the work carried out, parts fitted, miscellaneous items used and/or inspection sheets are entered as required against the job. The next section will describes completing jobs. To begin completing a job, do the following:
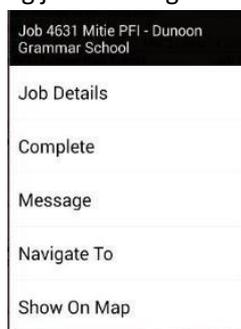
1. Navigate to the Jobs Screen.
2. Tap the job that needs to be completed.
3. Tap 'Complete'.

> **Note:** you can complete a job without using the Start Travel and Arrive on Site option but doing so will prevent certain fields in the following screens from being pre populated**

4. or 5 options will be displayed at the bottom of screen depending on whether the job is multiequipment or not. These are explained in turn below, along with the differences between single and multi-equipment screens.

Work Report

The initial screen displayed is the Work Report screen. This is where the details of the work carried out are recorded.

Job Type and Service Type (where applicable) are displayed, these can be changed by the user.
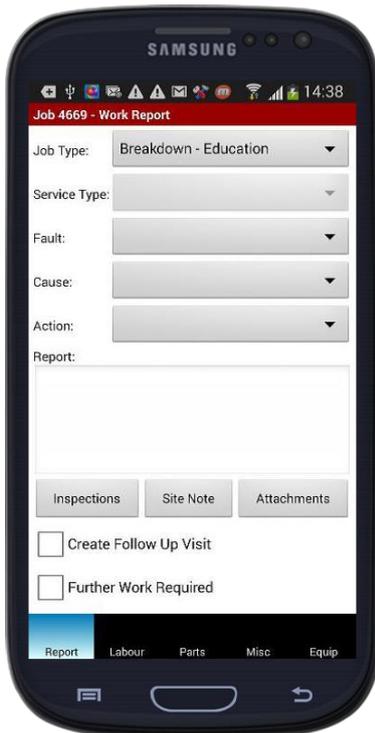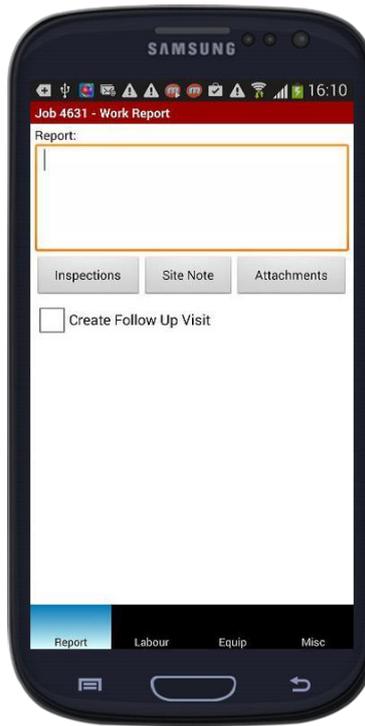
Single Equipment   *Multi-Equipment*

Job Type – The ability for an engineer to change the job type can be controlled by a system setting.

Service Type – The service is only available for Service jobs but can be changed by the engineer.

Faults, Cause and Actions - If Faults, Causes and Actions are being used on the Protean Main System these will be displayed, or can be selected from the pop-up menu.

Note - These options are not available on this screen when the selected job is multi-equipment. These items are held against the equipment items on that job (explained below).

Report - The report area is a 'free text' box where you can record the actual work done.

Note that completion of a job can be exited at any time by tapping on the back arrow at the bottom of the screen. Any data entered at that point is automatically saved.

Inspections - Inspections are also completed from this screen, for more information on completing or adding inspections, please refer to the 'Inspections' section later in this guide (See 'Inspections' p.36).

Site Note – Engineers can enter new Site Notes here, any site notes previously added can be viewed via the Job Details section.

Attachments – Documents, pictures and other files can be added to the job from here. These will be permanently attached to the job and can be viewed by other engineers and office users.

Create Follow Up Visit - If the job requires a follow up visit, tick the 'Create Follow Up Visit' box. This creates a 2nd visit against the same job number and automatically assigns it to you for the following day. A follow up visit maybe required if you needed to return to the site the following day to complete work or are working past midnight. The 2nd visit will appear on your PDA after signing and completing the job.

Further Work Required - If further work is required, place a tick in the box labelled 'Further work required' and enter the details in the 'Work Description' box below. The 'Parts' and 'Misc' buttons also become available, and in the same way as parts and miscellaneous items are applied to a visit they can be pre-assigned to the 'further work' visit.

When this further work information is returned to the Job Controller, they can then decide if the further work needs to be added to the same job as a further visit or if a new job is to be raised.

Labour

The labour tab allows labour times, travel and mileages to be entered against a visit.

To enter the labour time, tap on the 'Labour' tab at the bottom of the visit record.

The first field is the visit date, this should be checked to make sure it is correct and amended if necessary.

Two lines are provided for the time on and off a job. This allows you to record two labour sessions on the same visit (i.e. if you break for lunch or have to leave the site to collect a part for example).

Time is entered by tapping in the Time On/Off fields and adjusting the displayed time accordingly. The total time of the visit is calculated and displayed.

Note: If the arrival time is recorded then the first Time On field will display that time.**

The '**Clear**' button can also be used to remove any entries that have been made into the time fields.

The travel time to and from site and miles travelled are also shown and can be amended if necessary.

There are no differences between single and multi-equipment jobs on the labour tab.

Note: If the setting 'PDA Engineer Auto-Set Visit Time Off' is turned on, then the time off will be populated automatically when the user completes the job. If the engineer will also be travelling to the next job, then there is no need to use the Labour tab at all.**

Parts

The Parts tab at the bottom of the complete section is only visible on single equipment jobs. Parts on multi equipment jobs are handled differently and this process is described in the Parts on Multiequipment Jobs section.
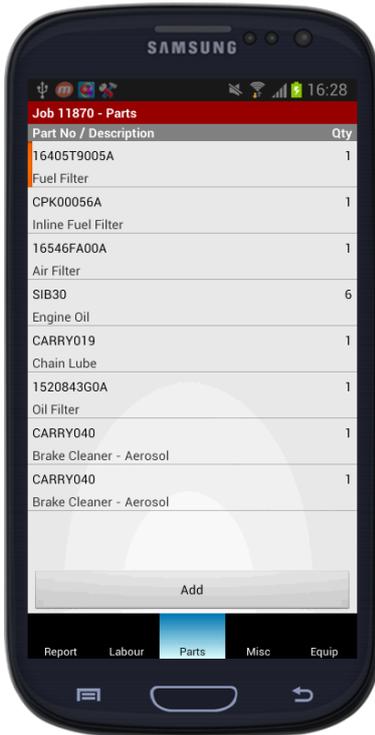
To view/enter parts on a Single-Equipment job, tap the 'Parts' tab. Parts may already be displayed here if they have been entered by the office.

In the event that an incorrect quantity was entered, a part can be edited by tapping the relevant part line and amending the data accordingly. Parts can also be edited by tapping and holding on the relevant part line and tapping the edit option.

If a part entered is completely incorrect or unused, tap and hold the relevant line then tap on 'Delete' and this will delete the line from the job.
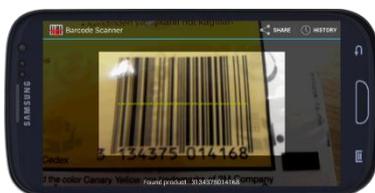
Adding Parts

To add parts to a job tap the add button at the bottom of the parts screen.

Parts fitted can be added by tapping on the 'Add' button, the screen will then show the 'Find Part' screen where parts can be searched for and added to the job.

Enter information such as the part number or description. As with the Equipment search screen demonstrated elsewhere in this guide, part number information can be entered using the barcode scanning facility. To do this tap the barcode scan icon next to either the Part No. field or the Mfr. Part no. field.

The device will launch the barcode scanning app. Position the devices camera over the barcode and the Part no. will be automatically detected and searched for.

Once a search has been performed, a list of matching parts will be displayed on the parts found screen.

To select a part, tap the part number from the list and tap 'Select'.

By default the quantity is set to one but can be amended.

If the part is a serial numbered item, tapping on the 'Serial No's' button will display a list of available serial numbers.

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If the part is to be a service exchange, then a tick should be placed in the box labelled Service Exchange. If serial numbered, this can also be selected as above.

You may have needed to purchase the part, in this event the 'Engineer Purchase' box should be ticked and the cost of the item entered in the 'Cost (£)' field.
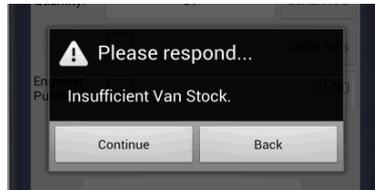
If the required quantity of parts is not available on the engineers van, then a warning popup is produced to inform the user.

This will not stop the user from issuing the part as the Van Stock may be out of date or incorrect. The user can continue regardless of this message.

Once details are correct, tapping 'OK' saves the details and enters the part onto the Parts Used list with the quantity of the parts displayed on the right hand side.

It may be desirable to confirm details of a part or check the stock available of a given part before adding it to a job. To do this, tap the part on the Parts Found screen and in the popup tap 'Details'.

The Part Detail screen displays the following information about the part
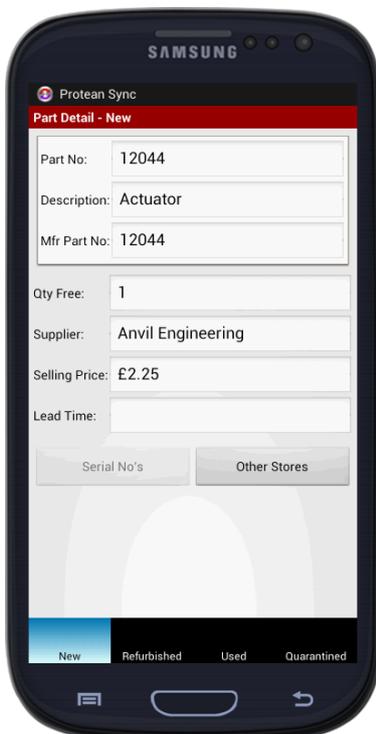
Part No. – Protean Part number.

Description – Description of part.

Mfr Part no. – Manufacturers part number if known.

Qty free – the available quantity in the current user's store.

Supplier – the default supplier for the part.

Selling price – the default selling price of the part.

Lead time – Order lead time if set.

Serial number – If the part is a serial numbered part then this button will display a list of available serial numbers.

Other Stores – tapping other stores will display a list of stores where the part is also available and includes the available quantities.

The same information is available for refurbished, Used and quarantined parts, by tapping the relevant button at the bottom of the screen.

Misc

If any miscellaneous items have been used (consumables, lubricants, etc.) or sub-contract work carried out during the visit these are added to the job by tapping on the 'Misc' tab.

Miscellaneous items are handled either on a job basis or on a per equipment basis or both.

To manage miscellaneous items on a job select the job, tap complete and tap the 'Misc' tab at the bottom of the screen.

The app presents a list of miscellaneous items on that job.

To add an item to this list, tap the Add button.
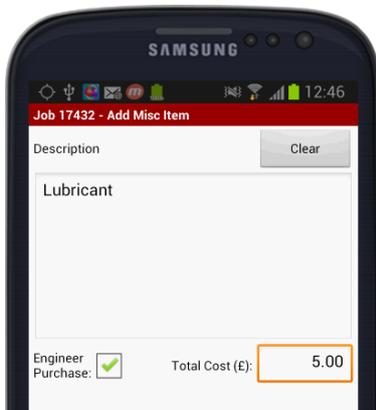
The 'Add Misc Item' screen will now appear.

Enter the description of the misc. item

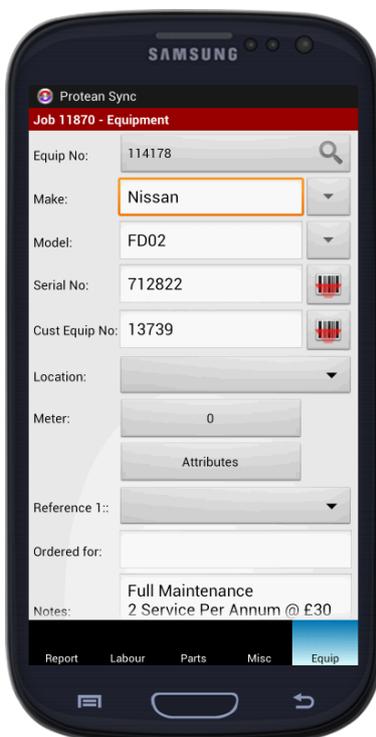Tapping on 'Clear' removes all text from the box.

If the item/service was purchased by you, the 'Engineer Purchase' box should be ticked and the cost entered.

The price to the customer will be determined by the Job Controller or by whoever has that responsibility.

Miscellaneous items can be added, edited and removed in the same way that parts can.

Equip

Tapping on the 'Equip' tab provides you with links to Equipment details. If an item of equipment is already attached to the job, then its equipment number will appear in the field at the top of the screen.

Other equipment can be searched for by tapping the Equip No. field.

- **Our Equip No.** – Protean held equipment number for the piece.
- **Make** – Manufacturer of item.
- **Model** – Model of Item.
- **Serial No.** – Items serial number.
- **Customer Equip no.** – Customers equipment reference.
- **Location** – Location equipment is sited at.
- **Meter Reading** – A meter reading can be entered here by either typing in the number.
- **Attributes** – After tapping on the 'Attributes' button you enter the 'Equipment Attributes' screen. You can view/edit the existing equipment attributes. To edit an attribute simply tap on it, depending on the format of the at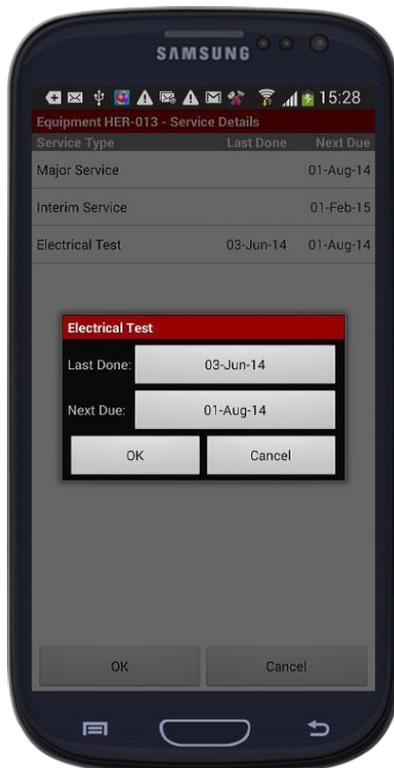tribute either a question/selection box will be displayed or a number pad to enter numerical values will be displayed. □ **Reference 1 and Reference 2** – These are user defined fields and can' be used to hold pieces of information that are not held as standard.

Notes – These notes are taken from the General Notes section on the Equipment record, They can't be edited or added to on the PDA.

Service Details –

By tapping on the Service Details button the engineer can amend or create the service schedule for this individual equipment record.

Tapping on the individual service lines allows the engineer to edited the existing details. They can enter or amend both the Last Done and Next Due service dates.

Adding New Service Details

Tapping the menu button on the device allows the user to add a new Service Type

Multi-equipment jobs

Work Report
The initial screen displayed is the Work Report screen. This is where the details of the work carried out are recorded.

Report - The report area is a 'free text' box where you can record the actual work done.

Note that completion of a job can be exited at any time by tapping on the back arrow at the bottom of the screen. Any data entered at that point is automatically saved.

Inspections – Inspections that are added or completed in the Work Report screen for multi-equipment jobs are for the job only and aren't specific to any piece of equipment. If you need to complete an inspection against an item of equipment then these must be done on the equipment tab. For more information on completing or adding inspections, please refer to the 'Inspections' section later in this guide (See 'Inspections' p.36).
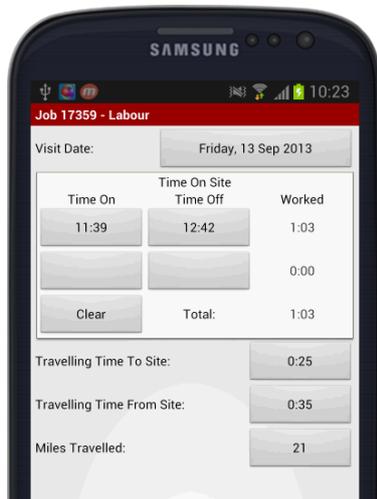
Site Note – Engineers can enter new Site Notes here, any site notes previously added can be viewed via the Job Details section.

Attachments – Documents, pictures and other files can be added to the job from here. These will be permanently attached to the job and can be viewed by other engineers and office users.

Create Follow Up Visit - If the job requires a follow up visit, tick the 'Create Follow Up Visit' box. This creates a 2nd visit against the same job number and automatically assigns it to you for the following day. A follow up visit maybe required if you needed to return to the site the following day to complete work or are working past midnight. The 2nd visit will appear on your PDA after signing and completing the job.

Labour

The labour tab allows labour times, travel and mileages to be entered against a visit.

To enter the labour time, tap on the 'Labour' tab at the bottom of the visit record.

The first field is the visit date, this should be checked to make sure it is correct and amended if necessary.

Two lines are provided for the time on and off a job. This allows you to record two labour sessions on the same visit (i.e. if you break for lunch or have to leave the site to collect a part for example).

Time is entered by tapping in the Time On/Off fields and adjusting the displayed time accordingly. The total time of the visit is calculated and displayed.

Note: If the arrival time is recorded then the first Time On field will display that time.**

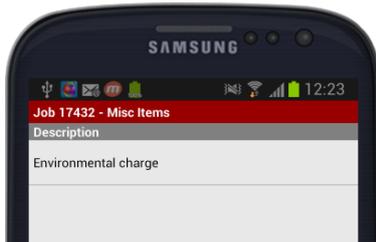The '**Clear**' button can also be used to remove any entries that have been made into the time fields.

The travel time to and from site and miles travelled are also shown and can be amended if necessary.

There are no differences between single and multi-equipment jobs on the labour tab.

Note: If the setting 'PDA Engineer Auto-Set Visit Time Off' is turned on, then the time off will be populated automatically when the user completes the job. If the engineer will also be travelling to the next job, then there is no need to use the Labour tab at all.**

Misc

If any miscellaneous items have been used (consumables, lubricants, etc.) or sub-contract work carried out during the visit these are added to the job by tapping on the 'Misc' tab.

Miscellaneous items are handled either on a job basis or on a per equipment basis or both.

To manage miscellaneous items on a job select the job, tap complete and tap the 'Misc' tab at the bottom of the screen.
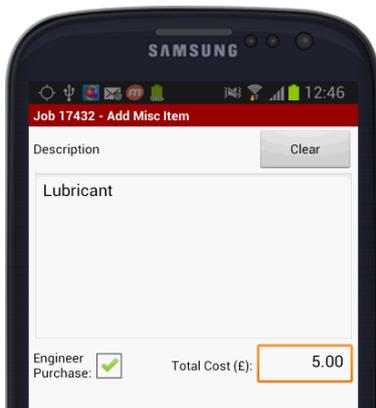
The app presents a list of miscellaneous items on that job.

To add an item to this list, tap the Add button.

The 'Add Misc Item' screen will now appear.

Enter the description of the misc. item

Tapping on 'Clear' removes all text from the box.

If the item/service was purchased by you, the 'Engineer Purchase' box should be ticked and the cost entered.

The price to the customer will be determined by the Job Controller or by whoever has that responsibility.

Miscellaneous items can be added, edited and removed in the same way that parts can.

** Please note that Misc items entered here are not specific to any equipment but are specific to the job/visit as a whole. If you need to add equipment specific Misc Items then you will need to add them against the equipment on the equipment tab.**

Equip on Multi-equipment Jobs
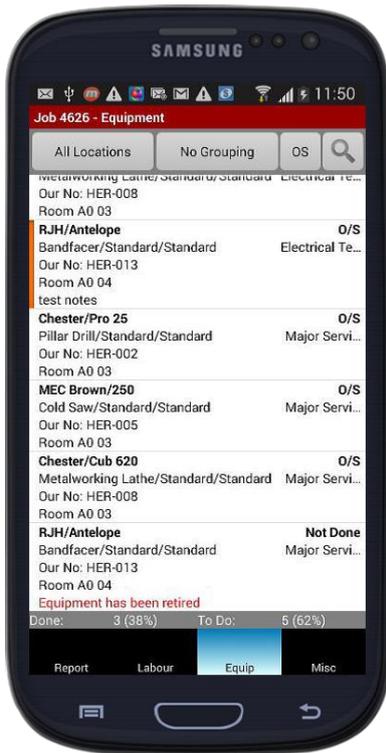
The equip tab is also available on multi-equipment jobs. The screen works in the same way as that described in 'Single Equipment Jobs'. Tapping a piece of equipment presents the user with a popup menu consisting of three options, 'Done', 'Not Done' and 'Edit Details'.
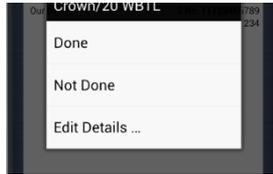
Done - Marks this item of equipment as having had the work carried out on it.

Not Done – This leaves the item as outstanding on the job.

If the equipment has an Inspection assigned then 'Pass', 'Fail', 'Not Done' and 'Edit Details is displayed.
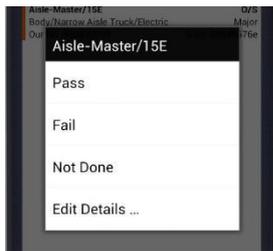
Pass – If the equipment has an inspection attached, the 'Done' option is replaced by Pass and Fail and can be used to respond to the inspection. Tapping one of these will prompt the user to complete the inspection.

Fail – As above.

Edit Details – This option allows details of work carried out to be entered along with equipment inspections and changes to equipment to be recorded.

Report

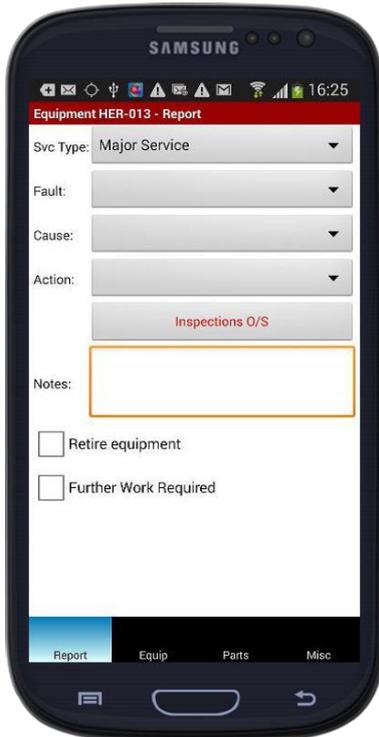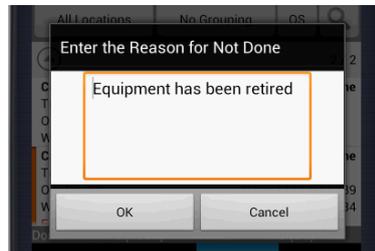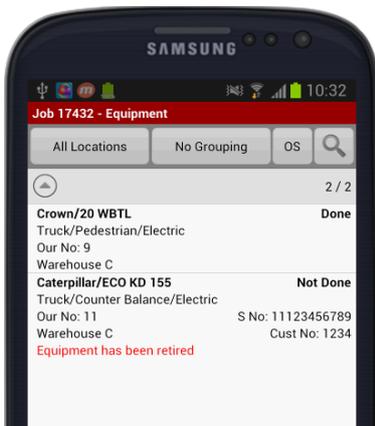**Svc Type** – The service is only available for Service jobs but can be changed by the engineer.

Fault/Cause/Action - Unlike Single equipment jobs, Fault, Cause and Action information on Multi-equipment jobs must be added per piece of equipment. This can be done from this screen.

Inspection – Inspections completed here are specific to the equipment record that the user selected. They will be linked to that equipment and display the equipment details on the inspection report, please refer to the 'Inspections' section later in this guide (See 'Inspections' p.36).

Notes – Notes entered here are specific to the equipment record and job.

Retire Equipment – This allows a user to retire a piece of equipment. This functionality is designed to allow the management of equipment this is being replaced as part of the work carried out and should not be used again. The engineer can then replace the item of equipment from parts stock which Protean converts to another piece of equipment. This relies upon make and model details having been set against the part.

Checking the retire box marks that piece of equipment as retired. The user is also asked if the status of the equipment job should be changed to 'Not Done'. If the user responds 'yes' to this, then the app asks for a reason why the work has not been done, which in this case will be pre-populated by the text "Equipment has been retired".

When viewing the equipment list on the job again, a message is displayed underneath the piece to indicate that is has been retired.
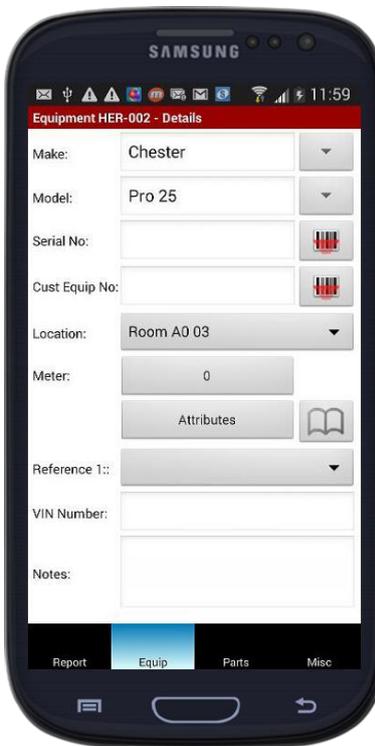
In order to replace a piece of equipment that has been retired, the user must issue to the job an equipment item that features a Make/model on the record. If this has not been done, then the user will be unable to mark the item of equipment on the job as 'Done' and will only be able to set the item as 'Not Done' (because the item has been retired and not replaced'.

To add a piece of equipment to replace the item being retired, the user should add a part from stock that is to replace the item being retired and add this against the equipment entry on the job. (Adding parts is described above in the Parts section).

When added, a note is shown in red underneath the part to indicate that this will replace the retired item.

Further Work required – Further work can be added here, this works in the same manner as the further work function on single equipment jobs.
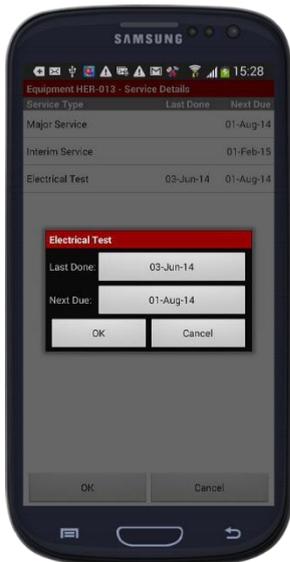
Equip

- **Make** – Manufacturer of item.
- **Model** – Model of Item.
- **Serial No.** – Items serial number.
- **Customer Equip no.** – Customers equipment reference.
- **Location** – Location equipment is sited at.
- **Meter Reading** – A meter reading can be entered here by either typing in the number.
- **Attributes** – After tapping on the 'Attributes' button you enter the 'Equipment Attributes' screen. You can view/edit the existing equipment attributes. To edit an attribute simply tap on it, depending on the format of the attribute either a question/selection box will be displayed or a number pad to enter numerical values will be displayed.
- **Reference 1 and Reference 2** – These are user defined fields and can' be used to hold pieces of information that are not held as standard.

Notes – These notes are taken from the General Notes section on the Equipment record, They can't be edited or added to on the PDA.
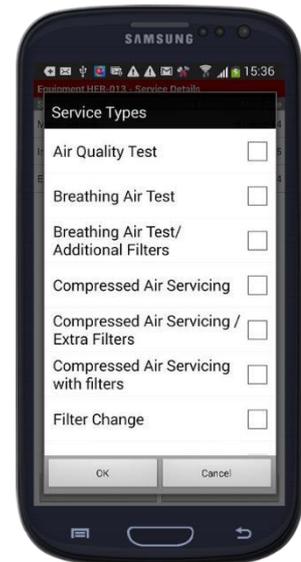
Service Details -

By tapping on the Service Details button the engineer can amend or create the service schedule for this individual equipment record.

Tapping on the individual service lines allows the engineer to edited the existing details. They can enter or amend both the Last Done and Next Due service dates.

Adding New Service Details

Tapping the menu button on the device allows the user to add a new Service Type

Parts on Multi-Equipment jobs

Parts

For Multi-equipment jobs the parts added must be associated with the piece of equipment on which they have been use or to which they have been fitted.
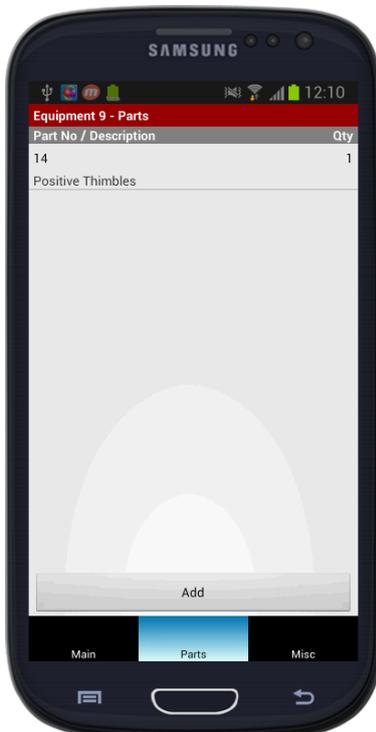
To manage parts on a piece of equipment:

1. Select the job and tap complete.
2. Tap the equipment tab.

   on.

3. Tap and hold the piece of equipment you wish to manage the parts

4. Tap 'edit details'.
5. Tap the 'Parts' Tab.
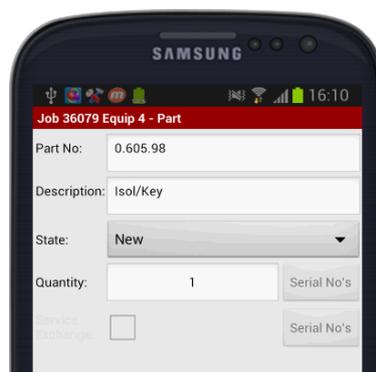
The user is shown a list of parts that are currently issued to the job.

Tapping the 'Add' button will display a list of parts that have been issued to the job but not allocated to a piece of equipment. The user should select the part required and then specify how many of that part have been used on that particular piece of

equipment. From this point on the process of adding and managing parts on the job is identical. All parts used should be added to the relevant piece of equipment.

Misc items on Multi-equipment Jobs

Misc

For Multi-Equipment jobs Misc items can be attached to the job, pieces of equipment or both.

Adding a piece of equipment to a multi equipment job follows the same process for adding an item to a single equipment job.
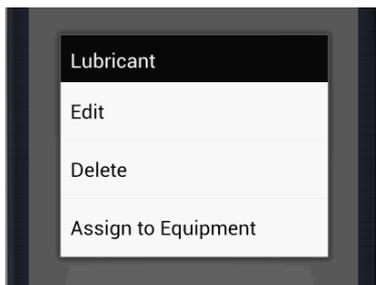
There 2 ways of adding a Misc item to a piece of equipment.

Adding Misc items to job and assigning them to equipment

The first involves adding the Misc item to the job first and then assigning that item to a piece of equipment. To do this:

1.   Add the item to the job as described above.
2.   Tap and hold the item until the popup menu is displayed.
3.   Select 'Assign to Equipment'.
4.   A popup menu containing a list of the equipment on the job is displayed.
5.   Tap the piece of equipment you wish to assign the item to.
6.   The item will be removed from the list of Misc items on the job.

Adding Misc items directly to pieces of equipment

Misc items can also be added directly to pieces of equipment, to do this:
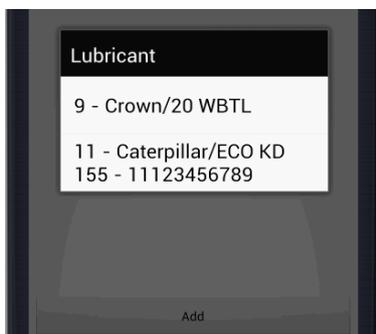
1.   Navigate to the job
2.   Tap complete
3.   Tap the equipment tab
4.   Tap and hold the piece of equipment you wish to add the Misc item to
5.   Tap the 'Misc' tab
6.   The screen will display ant items that have already been assigned to the piece of equipment
7. Tap the add button and add the item in the same way as if adding one to a job.
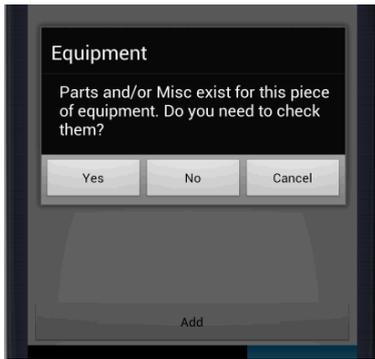
The main difference on this screen is that the equipment number, rather than the job number is shown at the top of the screen.

When leaving the Misc Items screen the user may receive a message which asks the user whether the parts or misc items on the equipment need to be checked.

The user should respond with yes or no. Yes takes the user back to the list of items on the equipment so those items can be double checked. Responding No will cause the app to exit back to the equipment tab of the job.

Sign Off

Once work is complete the job should be signed off by the engineer and a signature should also be collected from the customer.

To sign off a job the user should

1. Locate the job in the list and tap Complete.
2. Tap the devices Menu button.
3. Tap the 'Sign Off' button located at the bottom of the screen.

If any equipment is still outstanding on the job a warning is displayed to alert the user to this fact.

The user may also be asked if they will need to add travelling time away from site when the timesheet is submitted.
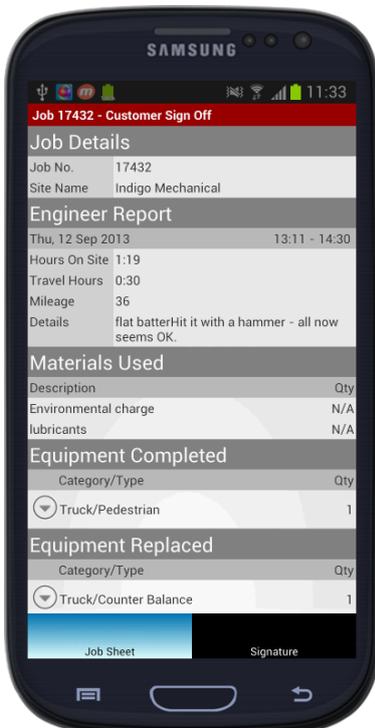
well.

The system produces a job sheet which displays the times and engineers work report along with any materials used.

If items of equipment have been retired or replaced, these are listed as

If the job is a multi-equipment job, then pieces of equipment are listed by category. To the left of each category a circular button with a downward pointing arrow is displayed. Tapping this expands the report to show details on the equipment within that category.

Each item of equipment can be opened again to display materials used on that piece of equipment.

Tapping the arrowed button again will collapse this extra information and return the user to the original concise view of the job sheet.
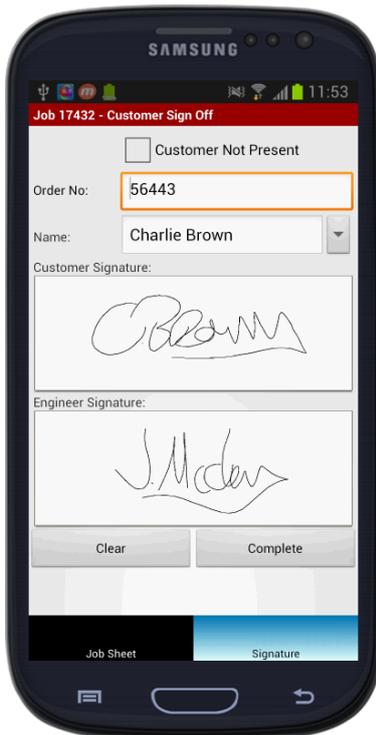
Tapping the Signature button at the bottom of the screen displays the Sign Off screen itself.

The job can be marked as 'Customer Not Present'. This allows the job to be completed without a signature being collected.

Order number - allows a customer's order number to be entered if it was not present when the job was created.

Name – Allows the user to select the contact at the site is signing the work off. This can be selected from the drop down list or the name can be typed directly by tapping the name field.

The next 2 boxes display the customer and engineer signatures once captured.

Once these details have been confirmed as correct, the user can collect a signature from the customer.

Tapping the **customer signature** field changes the orientation of the device to landscape, allowing a larger input area for the customer to sign in.

Once signed the 'I Accept' button should be tapped and the user is taken to the Signature screen so that the engineer can then enter their signature.

Once both signatures have been recorded, the engineer has the option to complete the job or to clear the signatures.

Creating a New Job

A new job can be created by the engineer directly from the Device. To do this
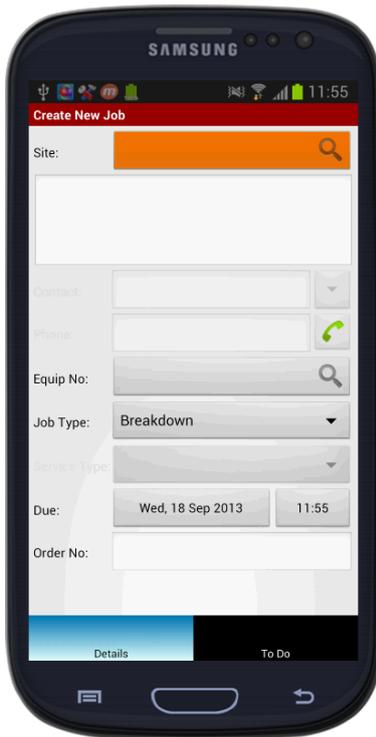
1. Navigate to the jobs list.
2. Tap the Menu button on the device.
3. Tap 'Create new'.
4. Tap Job.

Tapping the 'site' button at the top of the screen allows the user to select the site at which the job is going to be carried out.

Tapping the 'To Do' button at the bottom of the screen allows the user to enter details of what should be done as part of the job.

Equipment can be added, the job type can be selected and the due date for the job can be specified.

An order number can also be ordered at this stage.

To create the job tap the devices menu button and tap 'create'

Equipment

Searching for Equipment

Equipment can be viewing and searched for via either the job details section or the complete option. Tapping the magnifier symbol in the top right of the screen.

Adding Equipment

Equipment can be added to this or to another job via the complete option on each job

Note: You will be unable to add equipment to a job if the selected piece is attached to a different maintenance contract that of any equipment already being worked on**
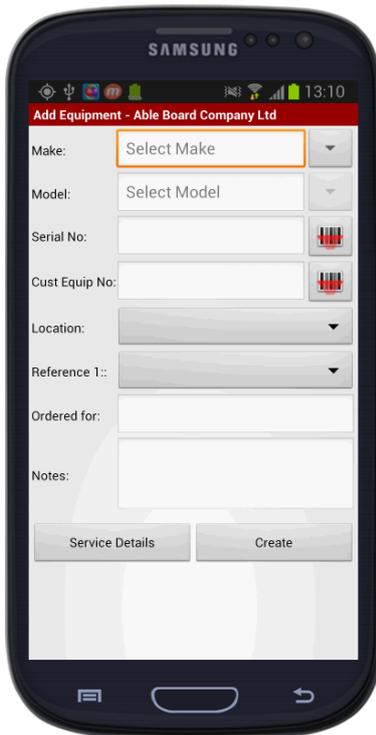
1. From the jobs screen select the job you wish to add equipment to

2. Tap 'Complete'.

3. Tap The 'Equip' tab.

4. If no equipment has already been added to the job.

5. Tap the search icon in the top right hand corner of the screen.

6. Tap the 'search' button.

7. At this stage if the equipment already exists against the customer record this will be present in the list of results returned by the search. Tap the item of equipment to select it.

8. If the equipment is not already attached to the customer record, the user should tap the 'Add Equipment' Button.

The make and model information can be selected from the drop down list or can be directly entered using the keyboard. If the Make or model entered is not already in the list of available makes and models, then the app will add the entry into the list.

Tapping the 'Create' button will create the equipment using the details entered.

In addition to the method described above, where the job being worked on is a multi-equipment job, the user can add equipment directly from the list of equipment on the job. To do this:

1. From the jobs screen select the job you wish to add equipment to

2. Tap 'Complete'.

3. Tap The 'Equip' tab.

4. Tap the Menu button on the device.

5. Tap the 'Add Equip' button.

6. The user is then able to add equipment in the same manner as described above.

Editing Equipment

Equipment can be edited by following the below instructions:

1. Select the job against which the equipment is attached.
2. Tap 'complete'.
3. Tap the Equip tab.
4. Either search for a piece of equipment to replace that on the job by using the search Icon or overtype the details of the equipment that has been added to the job to correct any mistakes.

Note: Be careful not to overtype the details of a genuine piece of equipment, this will replace the existing details on that equipment number with those you have entered.**

Attributes

Viewing attributes

Attributes can be viewed from the equipment tab of any job. To see this
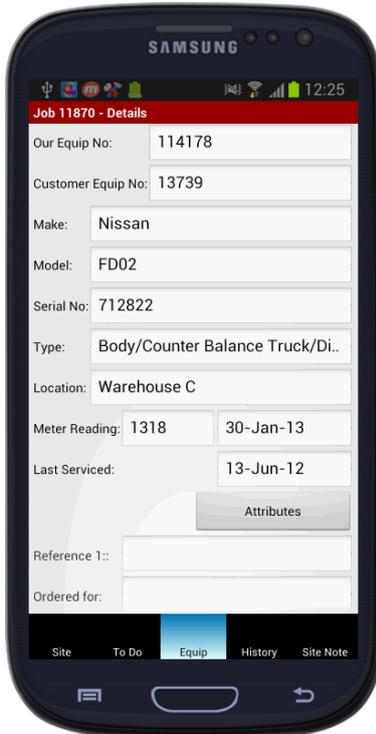
1. Tap the job for which you wish to view equipment attributes.
2. Tap 'Job Details'.
3. Tap 'Equip'.
4. Tap 'attributes' (or if Multi- equipment tap the item of equipment and tap and hold the item before tapping view attributes.
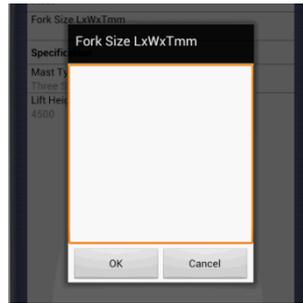
Adding attributes

Attributes can be added to a piece of equipment from the complete screen of the job to which they are attached.
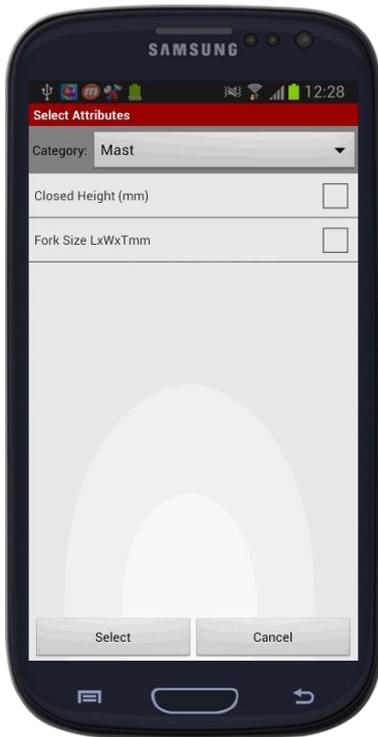
2. Tap 'Complete'.
3. Tap 'Equip'.

6. Tap 'Add Attributes'.

1. Tap the job you wish to view equipment attributes on.

4. Tap 'attributes' (or if Multi-equipment tap the item of equipment and tap and hold the item before tapping view attributes.
5. Tap the menu button on the device.

The user is then able to select a category and/or selection of attributes to add to the equipment.

Once added, attribute information can be added from the attribute list by tapping the name of the attribute.

An appropriate entry box will appear allowing the user to details the attribute information.
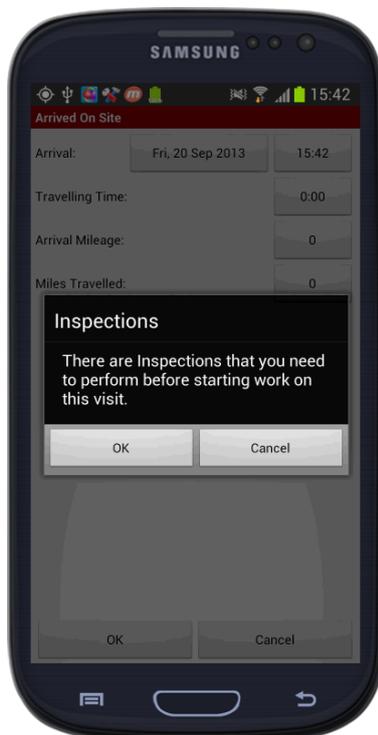
Inspections

Both job and equipment based inspections can be completed via the mobile app. Additional inspections can also be added by the engineer from the app. Multiple inspections can be held against the job and inspections are either associated with the job or with a piece of equipment on the job.

Up-Front inspections

If the job has an inspection attached which is marked as an 'Up Front' inspection, then the user will be prompted to complete this inspection before work can begin. This is regularly used for risk assessment type inspections. On tapping the Ok button after selecting arrive on site, the user will be prompted that an Up-Front inspection is required before work begins.
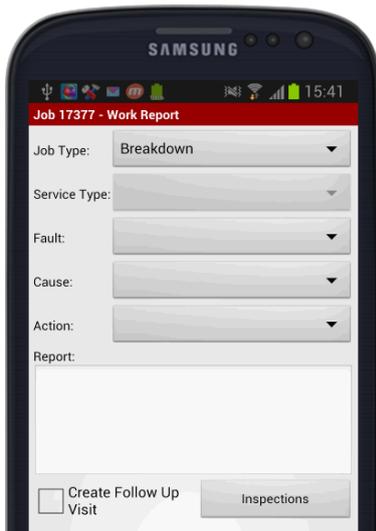
Tapping OK takes the user to a list of those up front inspections so that it can be completed before any other work on the job can be undertaken.

Completing a job inspection

To process an inspection, navigate to the job screen, tap the job and tap the 'complete' option.

Single Equipment

Multi-Equipment

The Work report screen is displayed. If an inspection is outstanding on a job, the 'Inspections' button will display in red and read 'Inspections O/S'.

If no inspection has been added to the job, then the button reads 'Inspections' and the font colour is set to black.

The screenshot to the far left is that shown when working on a single equipment job. The work report screen differs on single equipment jobs in that is it also includes fields to set the fault, cause and action values for a job. This is held against each item of equipment on a multi-equipment job and not present on this screen.

Selecting or adding an inspection

Tapping the Inspections button displays a popup menu, if an inspection has already been added to a job it will be listed, along with an 'Add New' option.
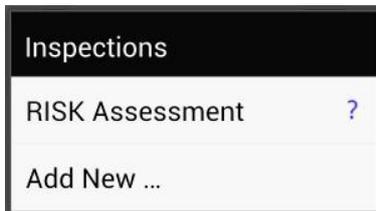
To complete an existing inspection, tap the name of the inspection you wish to complete and a list of the check points on that inspection. If the appropriate inspection is not listed, tap the 'Add New' option and select the desired inspection from the list.

Unconfirmed (outstanding) inspections are indicated by the '?' to the right of the inspections name. Completed (confirmed) inspections display a green tick.

Entering responses to Inspection checks

4 options are also present at the bottom of the inspection screen
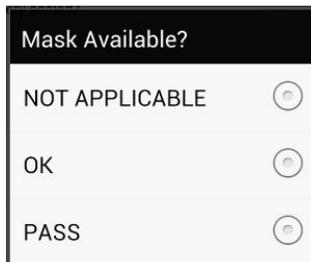
The Main tab is the default and is where the list of items on that inspection can be viewed and completed. To complete the inspection select the first check in the list. A popup is displayed with the checks description and the list of available options for that check.

As each item is completed, the user is prompted to complete the next item on the list of checks and another popup containing that items detail is displayed on screen.
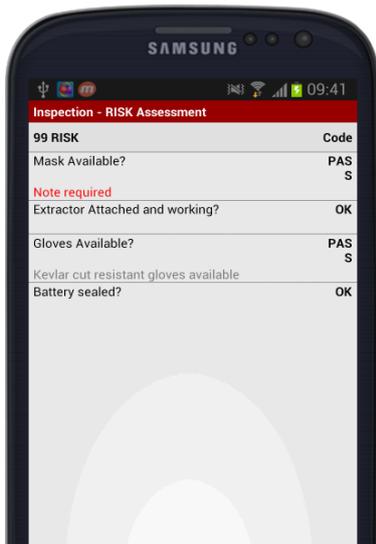
If the user's response to an item requires notes to be added, then once the response has been chosen, the user is taken to the notes screen. If the user completes the notes they are added against the item or if the user backs out of the inspection screen, the item will be highlighted in red with the words 'Notes Required'. To enter notes against those items listed as 'notes required', the user should, tap and hold on the item and tap 'Edit Notes'.

Pressing the back button returns the user to the main screen and allows the inspection to be returned to at a later date.

Each response is recorded and will be displayed on the item list for that inspection using the code associated with the chosen result for that inspection item.

Tapping the menu button give the user the option to reset the responses entered to the

The Notes tab allows the user to record notes about the inspection as does the Recommendations button at the bottom of the screen. Recommendations are printed on the inspections sheet once completed.
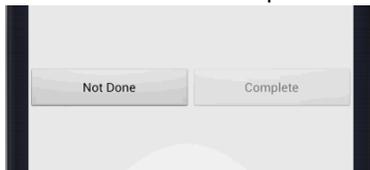
To complete an inspection tap the 'Confirm' button. The user is then able to mark the inspection as either 'Complete' or 'Not Done'. If there are any outstanding checks within the selected inspection or if any of the outstanding checks require notes to be added, then the complete button will be unavailable, as shown in the screen shot above.
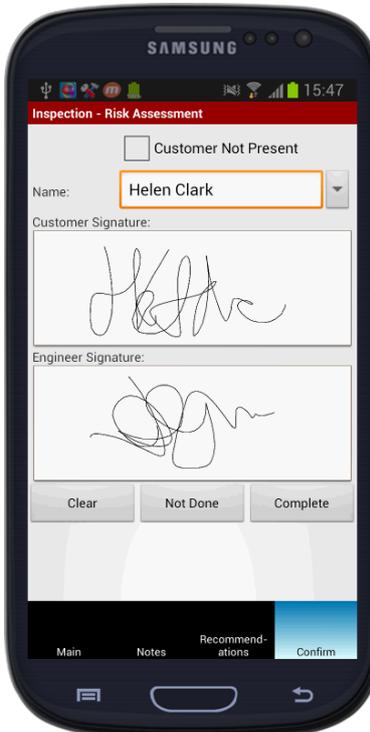
If the inspection is marked as an upfront inspection then the app will require a customer and engineers signature before the inspection can be confirmed as complete.

Tapping the confirm tab of the inspection will display the customer and engineer sign off page.

This page operates in the same manner as the sign off page for completing jobs. For more details on entering signatures, please refer to 'Sign-Off' on p.34.

If the user chooses to mark the inspection as not done, then a 'Reason Not Done' must also be selected.

Completing an equipment inspection

For equipment inspections on a multi equipment job, the user should navigate to Jobs, select the appropriate job and tap complete when presented with the popup menu.

Press the Equipment button to display a list of equipment on that job.
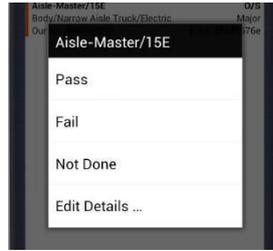
Tap the equipment entry to display the options menu for that piece of equipment. From here tapping Pass or Fail will take the user to a list of the attached inspections and from there the inspections can be completed item by item.

Alternatively, tap and hold the item of equipment to view the main screen for that item of equipment.

For the chosen piece of equipment, the app displays a screen similar to the single equipment work report.

As with the single equipment screen the 'Inspections' button is highlighted in red and the label changes to 'Inspections O/S' when there are outstanding inspections associated with that piece of equipment.

Tapping the Inspections button results in the list of inspections associated with the equipment being displayed.

Another inspection can also be added at this stage using the 'Add new' button.

From this point onwards, the process for completing the inspection is identical to that of completing an inspection on a single equipment job.

Messages

Protean's internal messaging system allows email-like messages to be sent and received by users of the Protean system. Messages can be sent from the Protean desktop application to other user of that application or to engineers using mobile devices and vice versa.

Messages can be accessed from the Envelope icon on the Main Menu. By default the number of unread messages is displayed next to the icon. This will update every time the Protean app syncs.

Tapping the icon will display the list of messages. The messages could be direct to the user, sent to the user as part of a group or could be sent as part of a notification for a new or existing job to alert the user that something has changed on that job.

Unread and read messages are distinguished by a closed or open envelope icon to the left of the sender's name. If an attachment was added to the message before it was sent, a paperclip icon will appear to the left of the subject line.

Tapping the individual message line will display the contents of that message.

Tapping the menu button will display 6 option buttons at the bottom of the screen. From here the user can perform the following functions:

Jobs – tapping this takes the user to the job screen.

Stock – Takes the user to the stock enquiry screen (see 'Stock' p.37).
Outbox – Displays the devices outbox and shows any message that has been marked to be sent, but has not completed sending.

New message – allows the user to create a new message to send to another Protean user.

Refresh – Instructs the device to refresh the message list and collect any new messages from the Protean server.

Sort By – Allows the user to change the sort order of the messages displayed on screen. The three options are 'Sender', 'Date received', 'Subject' and may be helpful for when trying to locate a message.

Reading a message

Tapping a received message item from the list displays the message itself. The message can also be accessed from the submenu that appears when tapping and holding on the message item in the message list.
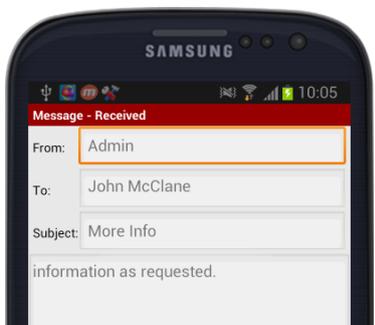
The message content screen is split into 2 sections, 'Message' and 'Attachments'. The screen will default to display the message tab and shows the senders name, the name of the recipient, the subject of the message and the body text of the message.
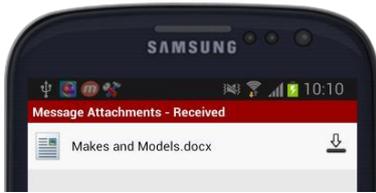
The attachments tab at the bottom of the screen displays a list of any attachments that have been added to the message. Tapping the attachment will download the attachment and allow the user to view any file for where an appropriate reader is installed on the device (you may need to download additional software to view certain file types).

Replying, forwarding and deleting a message

Once the message has been read, tapping the menu button on the device displays a submenu at the bottom of the screen consisting of the 4 options.

Reply – Creates a new message addressed back to the sender of the message you have received.

Reply All – Creates a new message addressed back to the sender of the message you have received, but also copies in all those others to whom the message was sent.

Forward – Creates a message with a blank recipient so that this message can be passed on to someone else.

All of the above options will include the original message text in the body of the message you send back.

Delete – This will delete the message.

Note: Beware no additional warning is given and the message will be deleted when this button is tapped
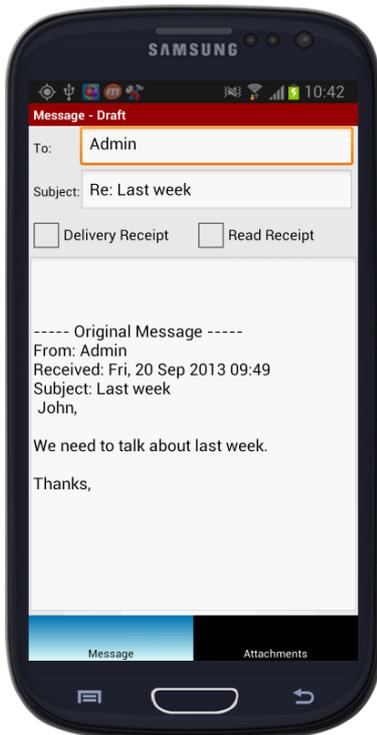
Depending on the option selected above the 'To:' field may already have been populated, as will the 'Subject:' field.

The user can specify whether a Delivery Receipt or a Read Receipt is required. If checked, the user will receive an additional message when the message sent is received and then again when subsequently read by the recipient.

To change the recipient of the message the user should tap the 'To:' field. This will present the user with a list of all the available recipients on the Protean system.

Multiple recipients can be selected by tapping each. The selected recipients will display a green tick to the right of the name. Once all recipients have been selected tap Ok to confirm.
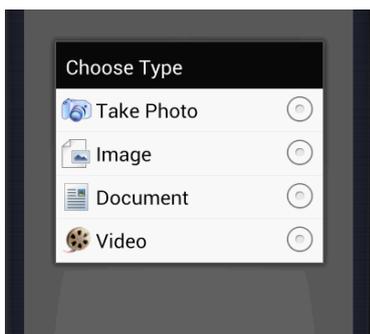
Attachments can be added to the message by tapping the attachments tab and then the 'Add' button.

Four options allow the user to take and attach a photo, attach an existing image file, attach another document or attach a video to the message.

Once an item has been attached to a message the device will present the user with options to either 'Send', 'Save' or cancel the message. Tapping 'cancel' removes the attachment from the message.
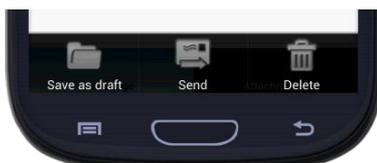
A message can also be saved as a draft, sent or deleted by tapping the menu button whilst on the message composition screen.

Creating a New Message

Creating a new message without replying to a received message can be achieved by navigating to the message list, tapping the menu button on the device and tapping the 'New Message' button.

Phrasebook

Wherever the Protean app requires textual information to be entered, the phrasebook is available. The phrasebook allows a user to enter a list of commonly used sentences and phrases that can be recalled and used by simply selecting the phrase from a list.
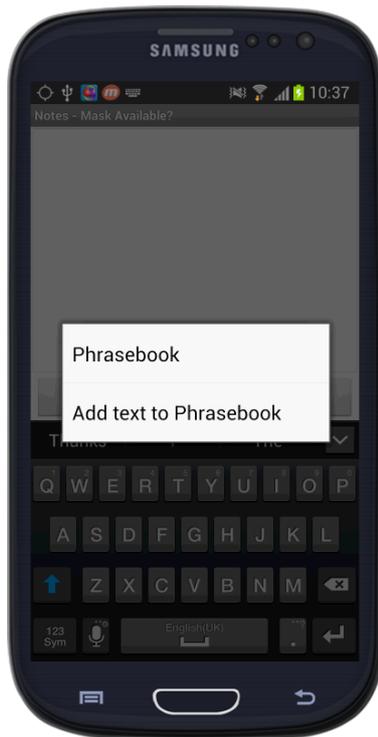
This means phrases can be added for visit reports, inspections, recommendations and any other field which would otherwise require the user to manually type out the text.

To access the phrase book tap and hold on one of the free text input fields within Protean.

A popup is displayed listing 2 items, 'Phrasebook' and 'Add text to Phrasebook'

By default the phrasebook presents any phrases added to the Protean server via the desktop client. This is useful for ensuring that phrases an organisation require on job sheets and elsewhere are consistent and reliably entered.

'Add text to Phrasebook' allows the user to enter personalised sentences in addition to the existing phrasebook and held on the device and never shared with other users.

As these additional items are stored on the device and not the protean server, they will be lost if the app is uninstalled.

'Phrasebook' allows the user to select or edit an existing entry.

Adding Text to the phrasebook

To add text, tap this option and then select an appropriate category for the phrase to appear in.

Categories allow phrases to be separated by the type of activity so that commonly used items from the area currently being worked in can be found easily.
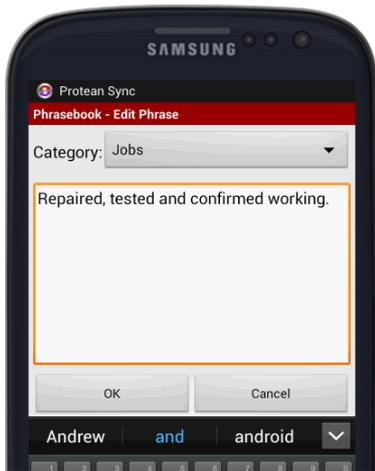
The app will default the category to match the area from which the phrasebook was access from. This can be changed by using the drop down option list at the top of the screen.

Once the phrase to be stored has been entered, click the 'OK' button to save it. By default this will also input that phrase into the text field from which you accessed the Phrasebook.

Selecting or editing an existing Phrase

To select an existing phrase tap and hold the field into which you wish to input the phrase.

When prompted tap 'Phrasebook'
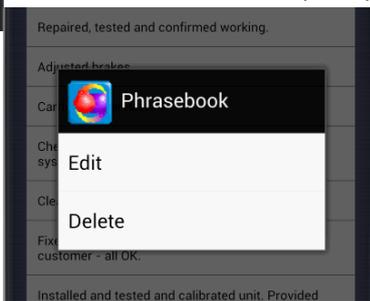
Tap to select from the presented the category using the button at the

category of phrases or change top of the screen.

tap and hold on the entry you wish to popup where the user can choose to Tap the appropriate option and

To edit or delete and entry, modify. The app presents a edit the entry or to delete it. confirm the changes.

Stock

The stock icon on the main menu allows the user to search for stock. Tapping the icon takes the user to the 'Find Part' screen.

Enter information such as the part number or description. As with the Equipment search screen demonstrated elsewhere in this guide, part number information can be entered using the barcode scanning facility. To do this tap the barcode scan icon next to either the Part No. field or the Mfr. Part no. field.
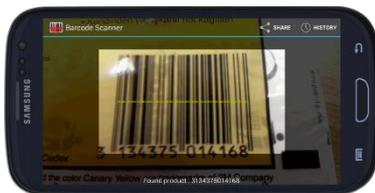
The device will launch the barcode scanning app. Position the devices camera over the barcode and the Part no. will be automatically detected and searched for.

The 'Van stock' option, when checked, limits the search to items held on the engineers van.

Sync

The sync option on the main menu exists to allow the user to forcibly update information held on the device, so that it matches that held on the Protean server. This includes setting information as well as information regarding stock held in the device user's store.

This process will happened automatically at intervals defined on the server, but if it is desirable or required to do this outside of those pre-defined intervals this option will perform the same function.
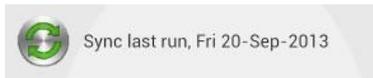
The sync icon is shown on the main menu and the date the device was last synced is shown to the right of the icon.
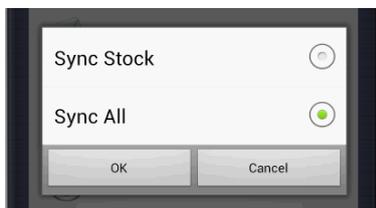
To perform a sync, tap on the icon and 2 options are shown. The user can choose to only sync stock, which will update the stock numbers and availability for the devices store, or to perform a full sync which will include synchronising setting data and the like.

Tap 'OK' and the app will sync and return to the main menu.

Timesheets

If the functionality is enabled, the timesheets option appears at the bottom of the list of options on the Main menu.

Next Timesheet, Wed 18-Sep-2013

The Clock item displays when the next timesheet is due from the current user. The app assumes that a time sheet will be completed in full each working day. If a timesheet is overdue timesheets will be indicated here in red.
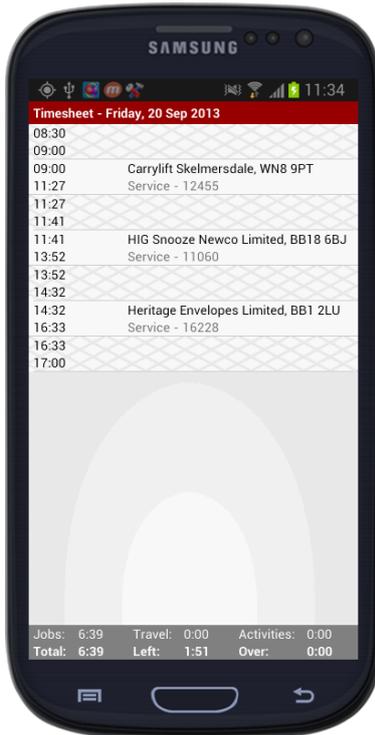
Tapping the timesheet Icon displays the timesheet screen. The day and date of the timesheet being shown is displayed at the top of the screen.

Below this the app lists entries for all the visits completed where times have been recorded.

Any time during the day that has not been allocated to a job or assigned to another activity is shown as a grey cross hatch.

The grey section at the bottom of the screen displays the number of hours that have been allocated to certain activities.

> **Jobs** – amount of time recorded against jobs.

> **Travel** – Amount of time recorded in travel.

Activities – amount of time recorded in other activities.

Left – amount of time in hours remaining to be allocated for the day.

Completing a timesheet

To complete a timesheet, there must be no unallocated time for the day in question.

Most of the time should be allocated to jobs as they are completed, but, gaps must be filled with activities before a timesheet can be completed.
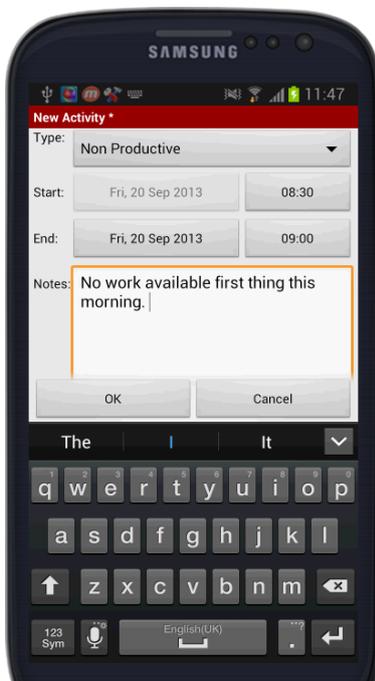
To fill a gap with an activity
1. Tap an unallocated section of time on the timesheet this displays the 'New Activity' screen.
2. Select an activity type from the drop down at the top of the screen. These activity types are predefined by you company.
3. Check the time period the activity is to fill and amend if necessary.
4. Enter notes to describe the activity.
5. Tap OK to complete the entry.

This will return the user to the Timesheet screen and will complete the previously unallocated timeslot with the activity entered, changing the background colour of that timeslot to white.

All the unallocated time slots must be filled before the timesheet can be submitted.
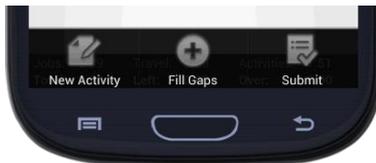
Tapping the menu button on the device whilst on the timesheet screen presents the user with 3 options.

New activity – Where an additional activity can be added in the same manner as described above.

Fill Gaps – This provides the user with a method of automatically filling all the gaps in the day's timesheet with a predefined default reason.

This process leaves all notes for the affected time slots blank.

Once all these gaps are filled, the timesheet can be submitted. To do this

1.   Tap the devices menu button.
2.   Tab 'Submit'.
3.   When prompted 'Are you sure?', tap OK.
4.   A notification box will appear confirming the submission. Tap OK.

Updating the app

If your Protean system has been updated and there is an upgraded version of the Engineer app available, the device will notify the user the next time the app refreshes.

The user will see a message advising that an update is available.

A notification will also display be displayed in the notification bar at the top of the devices screen.

Tapping 'Update Now' will cause the app to update.

The user will then be asked to confirm the install.

To do this tap 'Install'.

Once complete the user will then be able to log back into the Protean App and continue working.

Troubleshooting/Useful Info

Connectivity

If you are having difficulty in establishing a connection between the app and the Protean server, there are several items which the user should check.

When using a mobile device, some sort of internet connection is required in order for the app to communicate with the Protean server.

If using a mobile internet connection a signal and connection type indicator will appear in the notification bar at the top of the device.
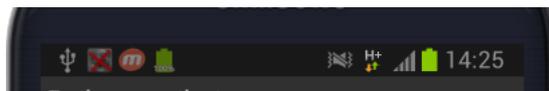
The 'H+' symbol in the image above indicates that this device has a data signal and the orange and green arrows suggest that data is being transmitted. There are several different types of data signal which the device may be able to operate over.

The symbols for each include G, E, 3g, H, H+ and 4g and provide a data connection with speeds increasing in that order, where G is the slowest connection and 4g is the fastest.

If the device is unable to connect and the signal indicator displays no letter, or even 'G' or an 'E' then it may be necessary to relocate to another area where a stronger mobile signal is available which can provide a faster or more stable connection.

Also shown in the image above is the Protean Icon
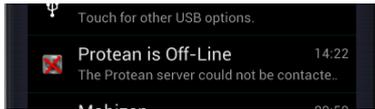
If the protean Icon as shown here, appears in the notification bar with a red cross over the top of it, this means that the device has been unable to communicate with the server.
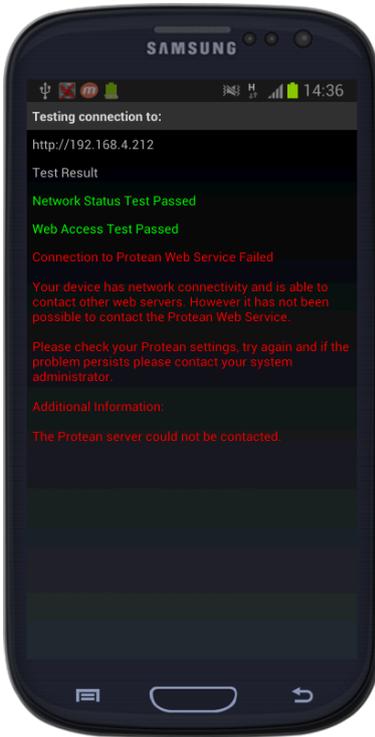
If this is the case, then it is advisable that the user runs the test connection routine within the Protean app. to do this:

1.   Navigate to the Protean Log in Screen.
2.   Tap the devices menu button.
3.   Tap settings.
4.   Tap 'Test Server connection'.

This routine runs three tests.

1.   That the device has a network connection of some sort.
2.   That the device has Web access.
3.   That the device can communicate with Protean Webs service.

If either of the first 2 tests fail, then this suggests that the device either does not have an internet connection or is otherwise unable to communicate over the internet.

If the third test fails, this suggests that there may be a problem connecting to the protean server itself.

Reset Database

From time to time you may need to carry out a Reset database this is also done through the Protean Settings and Reset Database.

Note: Please do not do this if you have jobs that you have completed/signed but haven't been refreshed back to the office as that data will be lost**.**
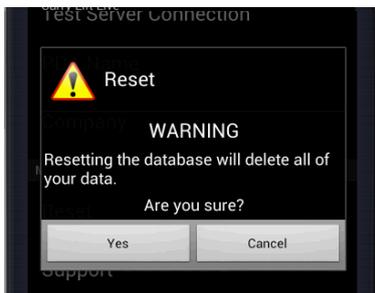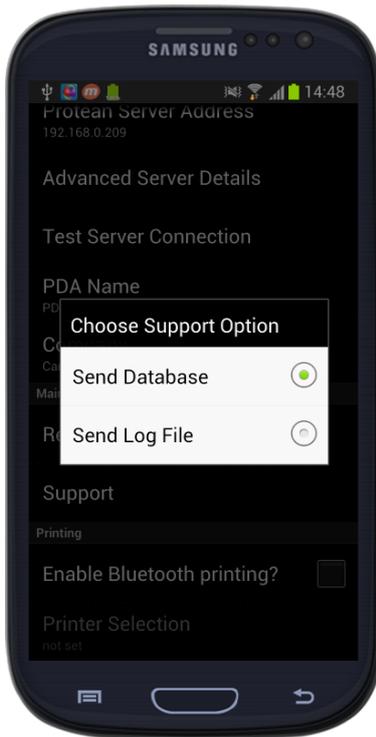

From the log in screen tap the menu button on the device.

1.   Tap settings.
2.   Tap reset.
3.   When prompted, read the warning and tap 'Yes'.

Send Error

If you experiencing a problem and have needed to contact Protean Support, the team may ask the user to send a copy of the devices Protean database to them for further investigation. To do this:

1. From the log in screen, tap the menu button on the device.

2. Tap settings.

3. Tap 'Support'.

4. The device will present the user with 2 options, 'Send Database' and 'Send Log File'.

5. Choose the appropriate option.

6. The user may be asked to choose how to transmit the information.

In this case select the devices email client.

7. Send the email from the device.

This is done by selecting the Support option from the Protean Settings and then selecting Send Log File**.**

**Note: The user must be able to send emails from the device for this to work. We often advise engineers to setup a Google email account if they don't have access to their work email through the device. **

Force stop

If the app become unresponsive or it becomes necessary to forcibly stop the app. This can be done via the devices 'force stop' functionality. To do this:

1. Navigate to the devices settings menu.

2. Find the application manager (this may appear as 'Apps', 'applications' or 'Application Manager').

3. Locate the Protean App in the list and tap to select it.

4. On the app Info screen locate the 'Force stop' button.

5. Tap the button and confirm you wish to stop the program.

6. Protean can be restarted from its icon on the home page or in the app drawer.

Clear data

If you have experienced a problem with the app, the Protean support team may advise you to clear the apps data. To do this follow steps 1 – 3 under force stop above.

Once at the App info screen tap 'Clear data' and confirm you wish to do so.

Note: If the devices data is cleared, it will be necessary to set up the app again. For more information see the setup section at the beginning of this guide.**

Version Control

Version	Comments	User	Date	Approver
1.1	Added new logo, contents and version info	Richard Barron	02/09/2019	

Version Control