

AMOS Business Suite

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Reference Manual

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Your AMOS Support Network

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Comments and Suggestions

We welcome any suggestion, idea or concept you might have on ways we can improve this manual for you. Please forward your thoughts by email to:

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CHAPTER 1 The AMOS Business Suite Application

AMOS Business Suite is a complex and powerful Windows program to handle most of the daily ERP functions encountered in organisations that may consist of multiple locations. It is a client/server application, where the client program is run on a Windows PC, and the server program may use one of several different database systems. A stand-alone configuration on a single PC is also possible.

The appearance of the screenshots in this manual may differ somewhat from those you can see on your screen. This is because there are a number of optional, integrated, modules that can be activated within AMOS Business Suite. In addition to the optional modules, there are a significant number of 'user defined fields' that your organisation may have chosen to implement.

1.1 The Client/Server Model

AMOS Business Suite is a client/server application, and the data is stored in a database. This section provides a brief description of the client/server model on which the AMOS Business Suite application is based.

1.1.1 The Hardware Components

In a typical hardware set-up for an AMOS Business Suite installation:

- Each AMOS user runs the application on a client PC with Windows. The PCs are connected to and communicate with a database server through a network.
- This is not the only possibility. The AMOS Business Suite may also be set up in a stand-alone configuration, where the database is located on the same PC as the AMOS application.
- AMOS Business Suite may be used in organisations with multiple locations. Typically, a Local Area Network (LAN) is used to enable each installation to facilitate communications at that location. There are also functions in AMOS that make it possible to exchange data stored in databases at the various locations. Such data exchange typically takes place on a Wide Area Network (WAN). For example, this makes it possible to exchange data between a main office and the various remote locations in the organisation.

1.1.2 The Software Components

Some of the vital software components that are involved in an AMOS Business Suite installation include:

- The client program AMOS Business Suite which is installed on each PC where it is to be run.
- The type of interface library depends on which database management system is used at the installation. For example, for the Adaptive Server Anywhere database system, an ODBC (Open Database Connectivity) interface may be used.
- The database engine typically resides on the database server machine (or on a PC in a stand-alone configuration). During installation, it is necessary to set certain parameters that allow AMOS Business Suite to communicate with the database engine through the interface library.
- The amos.db database file is created when the application is installed. It is the selected database engine that actually creates the database file according to its internal structural rules.
- When AMOS Business Suite is upgraded to a new version, the installation program automatically handles the updating of the database. Please note that the AMOS Business Suite application can only communicate with the database file through the interface library and the database engine.

1.2 How To Use This Manual

This Reference Manual contains information for the end user about working in the windows pertaining to the Framework of the AMOS Business Suite: those listed on the File menu and the Tools menu.

The use of the menus and working in the windows for Maintenance and Purchase, Quality and Safety, Crewing, and Voyage Management is covered in the module-specific User Guides.

Most of the material in this Reference Manual is organised according to topic, or administrative tasks and processes. For example, the system Registers; Import/Export functionality; and Users, Groups and Access are all grouped into their own chapters.

CHAPTER 2 Using AMOS Business Suite

The AMOS Business Suite is an integrated framework of several leading AMOS applications. Each AMOS application is configured as a Plug-in of the Business Suite and is individually enabled by license codes. When the Business Suite is installed, only the plug-in applications that you have entered a license code for will be accessible.

2.1 How To Start AMOS Business Suite

There are two main methods to start the application:

- Select the application from the **Start > Programs > AMOS** menu.
- Double-click the shortcut icon on your windows desktop.



Figure 1 The AMOS Business Suite icon

To start the AMOS Business Suite:

1. Start the application by double-clicking on the AMOS Business Suite icon located on your windows desktop. Alternatively, you can select the application icon from the **Start > Programs > AMOS** menu.

   The logon screen opens.
2. Type in your user name and password.
3. Click **OK**.

NOTE: If you don't have a logon account or you have forgotten your password, contact your system administrator.

If your logon details are accepted, the AMOS Business Suite desktop will then be displayed.

2.1.1 Why Do I Have To Logon?

Some of the functions in AMOS Business Suite are reserved for authorised people only: approving work, approving requisitions, and changing budgets, to name a few.

When you log on, you tell AMOS who you are, and AMOS will lock any commands that you are not authorised to use.

Also, AMOS keeps track of who performs certain operations, and when. That gives you a clear, secure record as required by many inspection organisations.

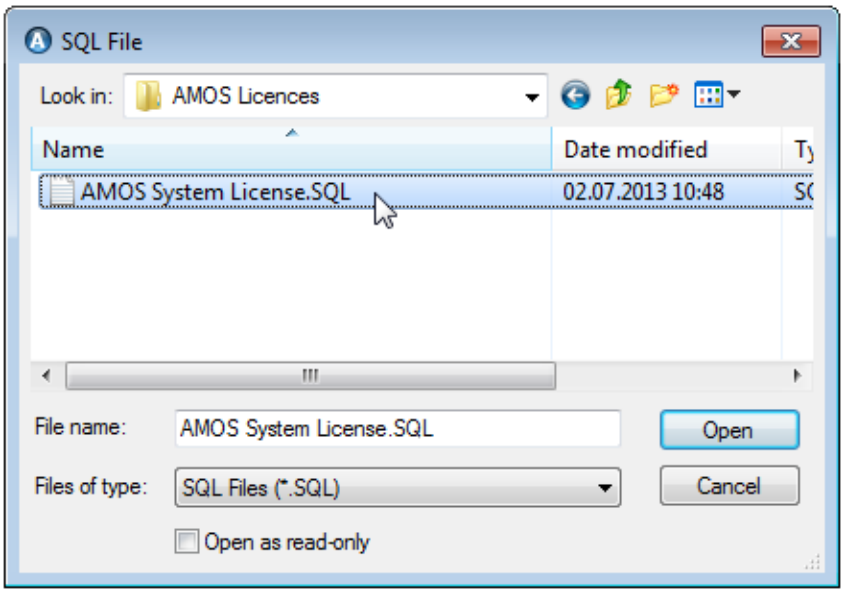
NOTE: Your organisation may use one or more additional security options available within AMOS such as complex passwords, maximum password age, minimum password length, maximum number of logon attempts and/or restriction of recently used passwords when registering a new one. Ask your system administrator if you are unsure if any of these features are employed.

2.1.2 Updating Your System License

You require a valid system licence to use AMOS Business Suite. If you see a message that the system licence must be updated, obtain a new licence file from your AMOS distributor.

To update the license:

1. Go to **Tools > Configuration > Update System License**.
2. Locate the folder where your license it and double-click on the SQL file or select it and click **Open**:



3. If the licence is valid your system is updated and becomes accessible.

2.2 The Dashboard

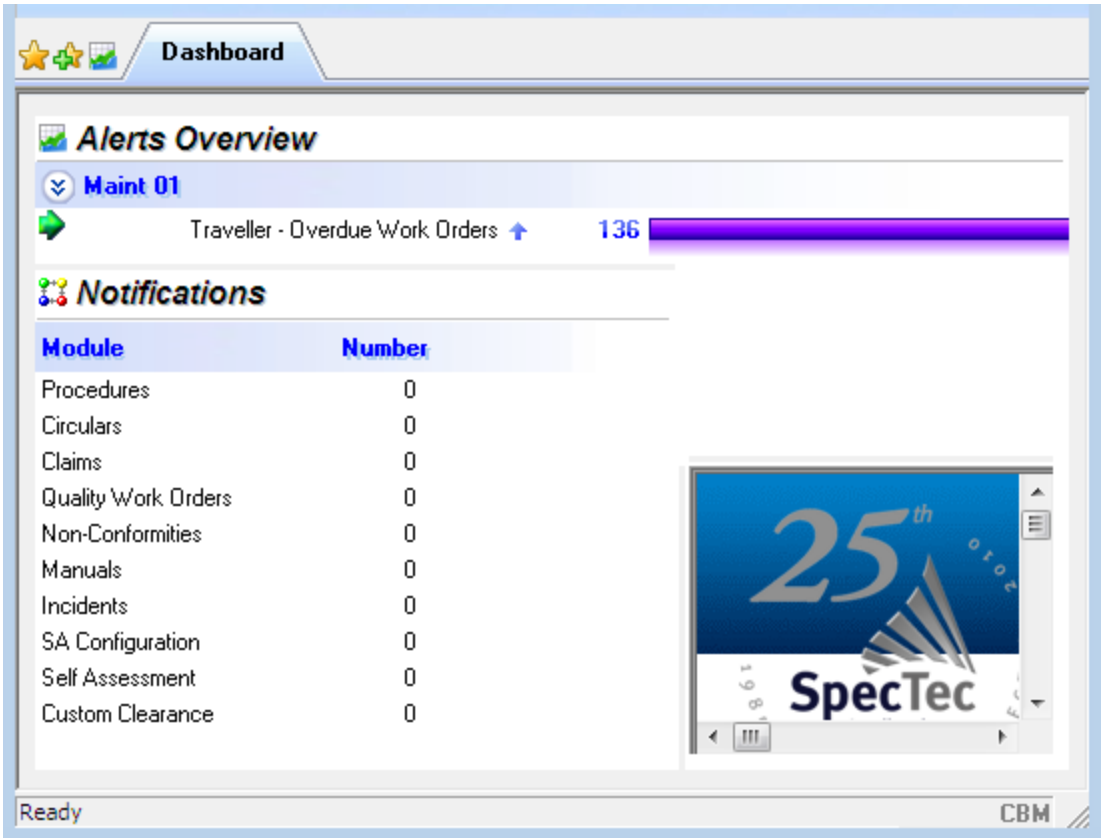
AMOS Business Suite opens to a customisable Home Page, or Dashboard. You can add convenient information to the dashboard like alerts and work flow notifications.

To switch the Dashboard on and off:

1. Go to **Tools > Options**. Open the Dashboard tab:

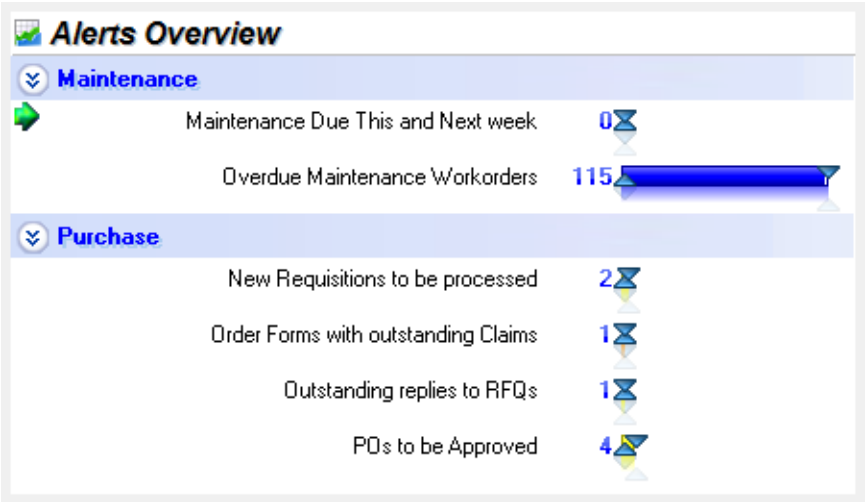


2. Check or clear the **Enable Dashboard** checkbox.
3. Click **OK** to close the window and apply your setting.



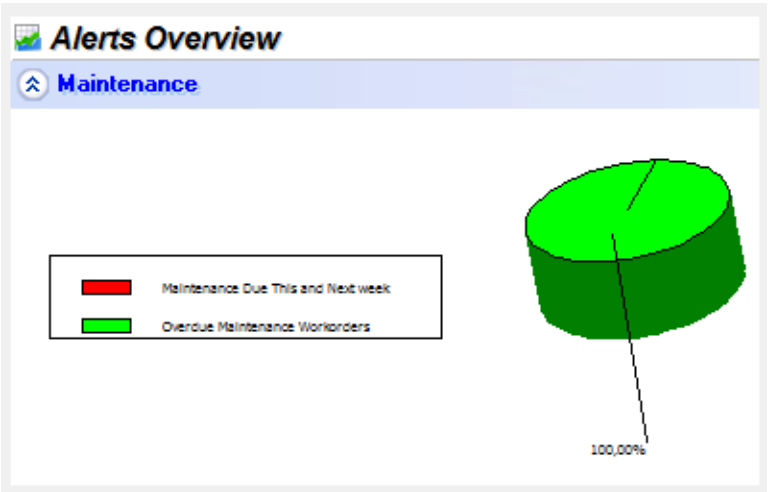
2.2.1 Alerts Overview

The Alerts Overview is a list of the current alerts present in the system. Which alerts appear on the dashboard is user-definable, in the **Tools > Options** window Dashboard tab.



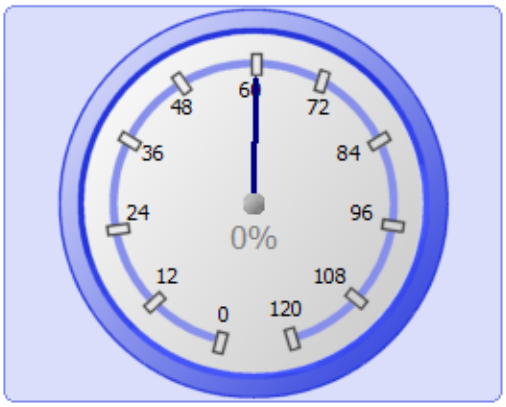
Double-clicking an alert opens the relevant window with the list of records. Right-clicking in the Alerts Overview opens a pop-up menu. You can choose to **Refresh** the Alerts, **Open** the selected one, or **Print** the contents of the Alerts Overview.

To change the Alerts display from a graph into a pie chart click the double arrow icon to the left side of the Alerts Group name:

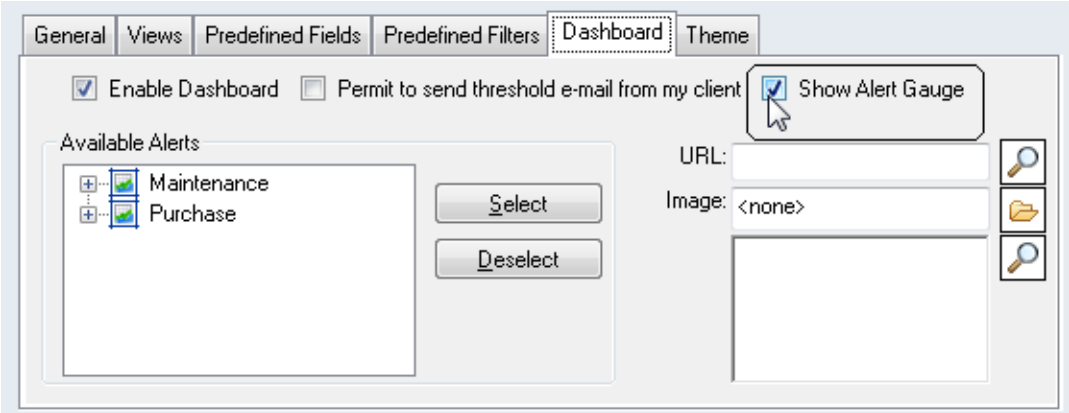


Alerts can also be configured with a set threshold indicating the maximum acceptable value on the given alert. If this threshold is crossed the alert bar and label will change colour and AMOS can send an email to the responsible users.

A gauge may be presented alongside the Alert bars with numbers on a dial visualising the alert values:



Switch the gauge on or off in the **Tools > Options >** Dashboard tab:



For more about customising your alerts list, see the *AMOS Business Suite Reference Manual*.

2.2.2 Notifications

The Notifications area of the Dashboard contains a list of modules where Work Flow is in use in your system. For each module you will see the number of Work Flow notifications presently awaiting your acknowledgement. Double-clicking on a module name will take you directly to the Work Flow Notifications window which contains the list of all notifications awaiting acknowledgement by the current user.

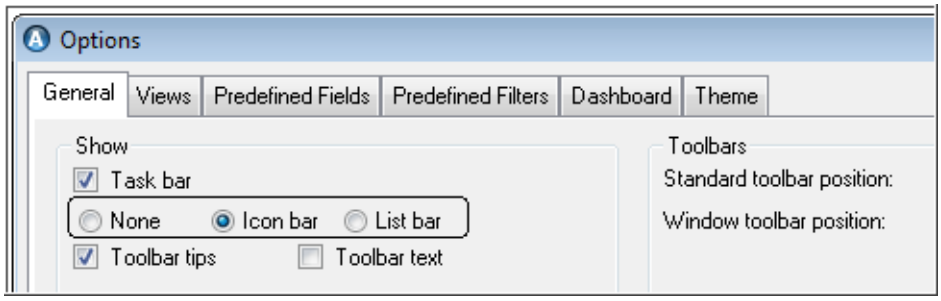
To set the number of seconds between checks for unacknowledged notifications:

1. Go to **Tools > Options**.
2. Enter an interval in seconds, in the **Mailbox/Dashboard Check Interval (sec)** field.
3. AMOS will check at the set interval.

2.2.3 Task, List And Icon Bar

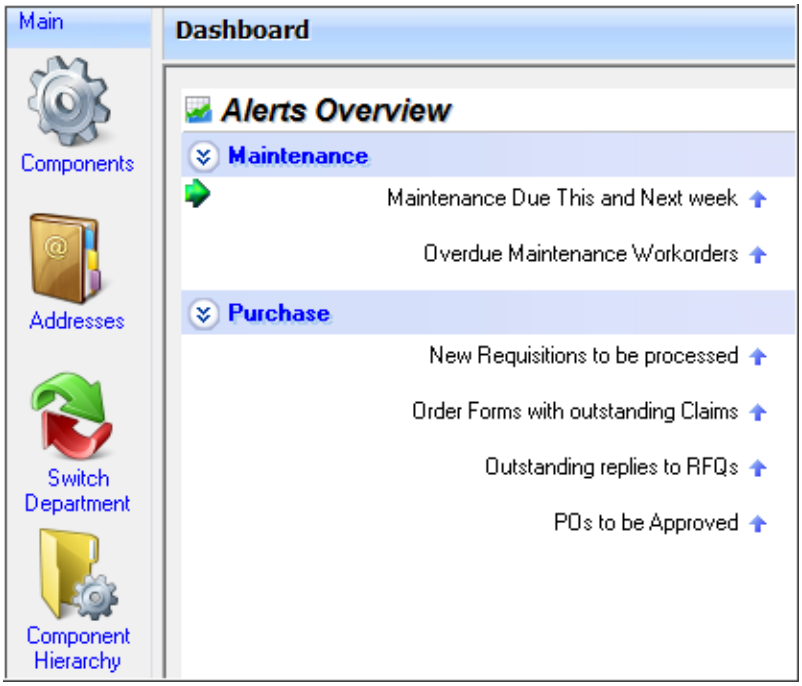
You can choose to have an Icon bar or a List bar present:

1. Go to **Tools > Options**.
2. Click **None**, **Icon bar** or **List bar** on the General tab:



3. Click **OK** to exit the dialog with your setting applied.

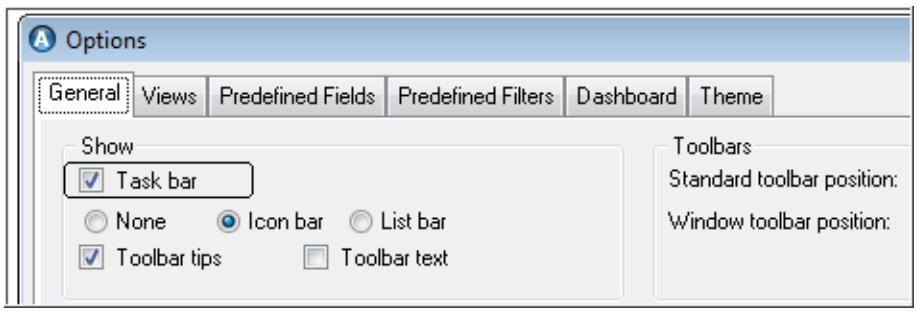
The List bar/Icon bar appears on the left hand side of the Dashboard and contains shortcuts to main areas of the application:



Once enabled, it is visible from any window.

You can also show or hide the task bar:

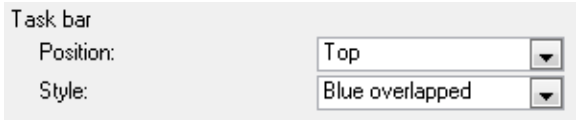
1. Go to **Tools >Options** and check or clear the **Task Bar** checkbox in the General tab:



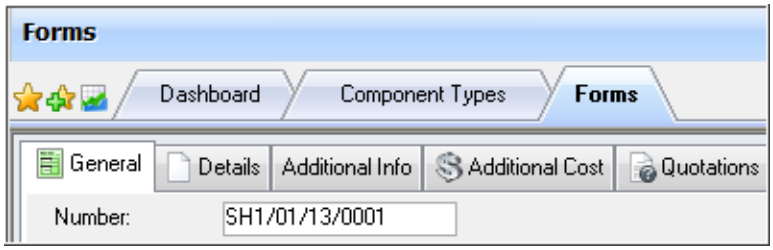
2. Click **OK** to exit the dialog with your setting applied.

The task bar shows you which windows are currently open. To configure its appearance and position:

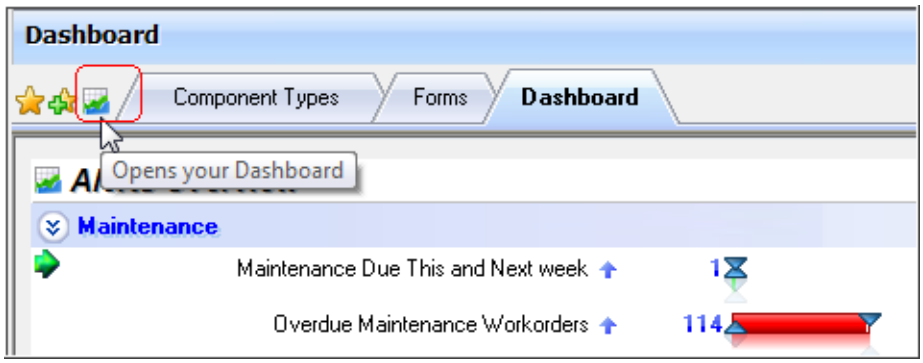
1. Go to **Tools > Options** and switch it on in the General tab.
2. Open the Theme tab and select a **Position** and **Style** for the task bar:



3. Click **OK** to leave the dialog and you will see the task bar appear as defined:



When other windows are open, clicking the dashboard icon/tab on the task bar returns the dashboard to the front of your screen, leaving the other windows open underneath:

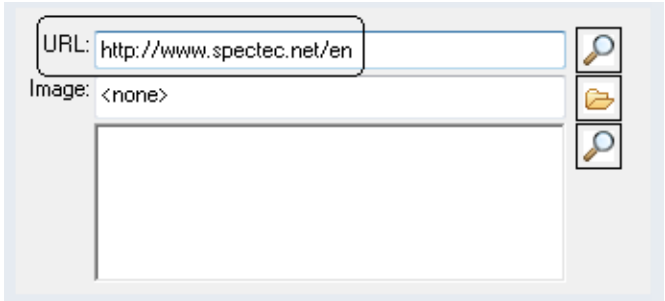


To read about all user interface options available in the Options window, see the *AMOS Business Suite Reference Manual*.

2.2.4 Showing A Webpage Or An Image On The Dashboard

To show a webpage on your dashboard:

1. Go to **Tools > Options...**. Open the Dashboard tab.
2. Copy and paste the link to your website in the **URL** field:



3. Click **OK** to exit the dialog. The page will appear in the bottom right corner of the dashboard when you are the logged in user. Remove the webpage at any time by clearing the **URL** field.
4. Using these two buttons on the toolbar:

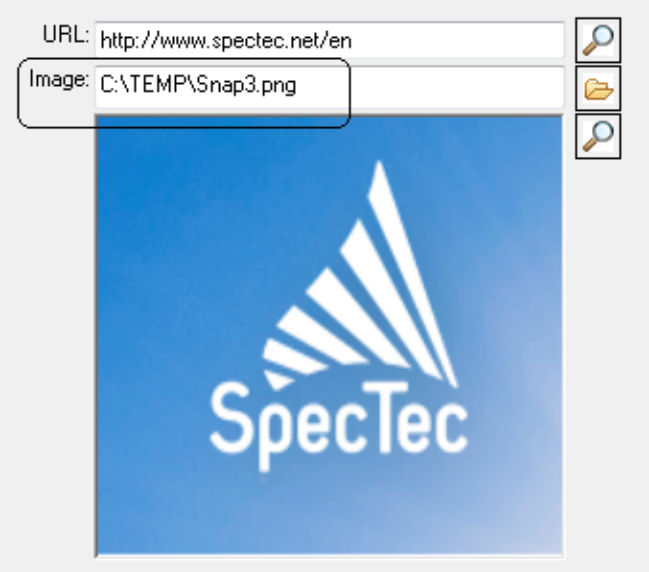
   move the webpage to the right side lengthwise, or

back to the bottom.

You can also expand or shrink the space the webpage takes by clicking on the side or top and dragging it.

To add an image to your dashboard:

1. Go to **Tools > Options...**. Open the Dashboard tab.
2. Browse to and select an **Image** file in your system:



3. Click **OK** to exit the dialog. The image will appear in the top left corner of the dashboard when you are the logged in user. Remove the image at any time by clearing the **Image** field.

2.3 The Windows In AMOS

The illustration below shows the AMOS main window when the dashboard is switched off. It controls any other windows that you open with AMOS, and it contains:

- The menus.
- The main toolbar, with shortcuts to frequently used parts of AMOS.

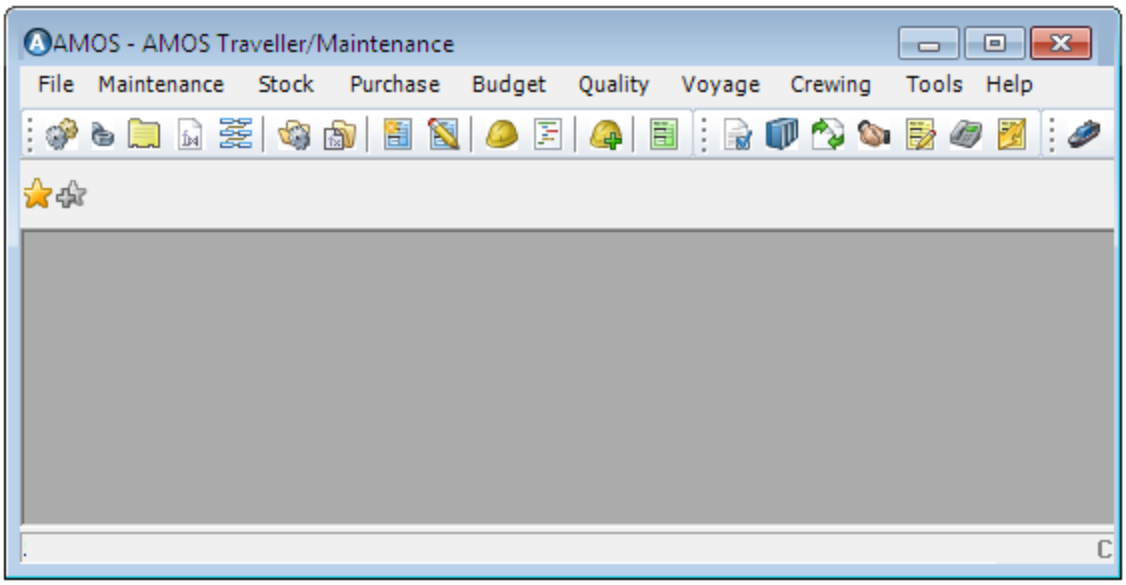
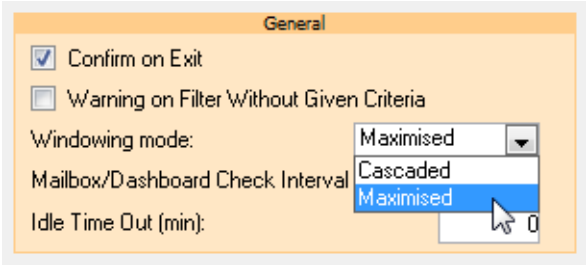


Figure 2 The AMOS Business Suite opening window

To set the default window opening mode:

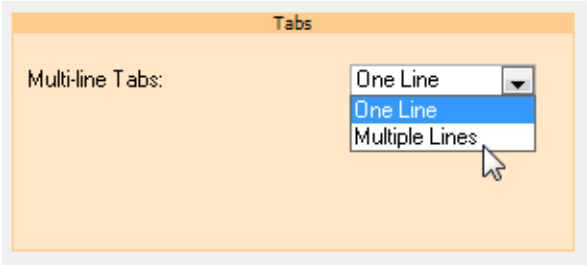
1. Go to **Tools > Options**.
2. Select 'Maximised' or 'Cascaded' from the **Windowing mode** drop-down on the General tab:



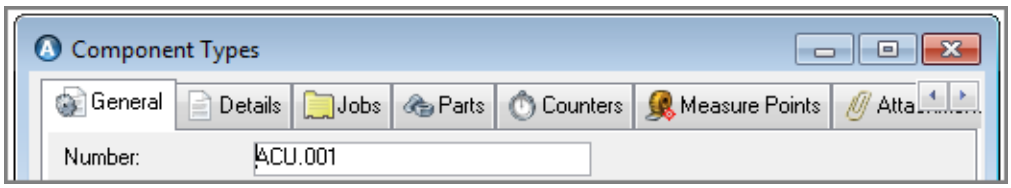
3. Click **OK**.

To set the behaviour of tabs when a window is not big enough to display them all:

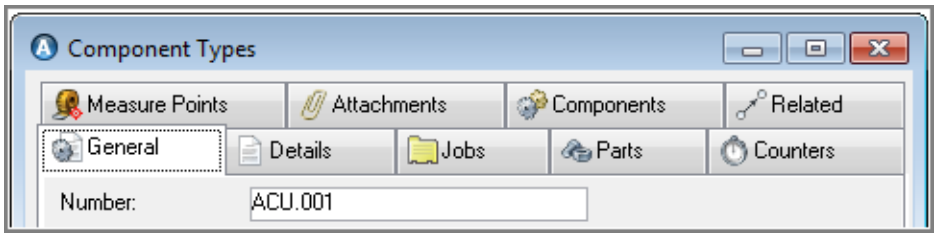
1. Go to **Tools > Options**.
2. Select a tab behaviour from the **Multi-line Tabs** field on the General tab:



'One Line' causes all the tabs to appear in one row with arrows to scroll through:



'Multiple Lines' causes tabs to be stacked in multiple rows and all visible at once:



3. Click **OK** to leave the dialog.

2.3.1 Title Bars

The AMOS Business Suite is designed to be as user-friendly as possible. The user interface offers alternative navigation options to cater for most peoples' preferences.

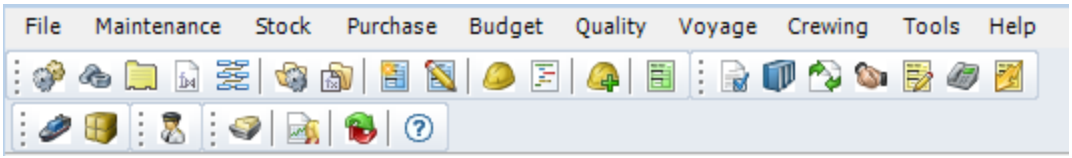


Figure 3 Navigation Bars

When you first open AMOS Business Suite the window that appears will have a title bar, usually blue in colour. The title bar informs you which installation (vessel) and department you are viewing information for. In the following example, the installation is `AMOS Voyager' and the department is `Maintenance'.

In addition to the main title bar, each window that is opened within the application has its own `Window Title Bar'. These title bars display the name of the open window and, depending on the information you are viewing, sometimes extra details of the individual item displayed within the window.

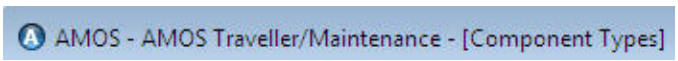


Figure 4 Window Title Bar

2.3.2 The Menu Bar

The main navigation area within AMOS Business Suite is the Menu Bar below.

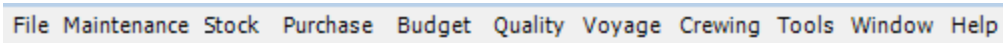


Figure 5 Menu Bar

All of the commands and functions available within the application can be accessed through the Menu Bar.

If any menus are 'greyed out', it means that your license does not include those integrated applications. It is possible to hide these menus using a parameter.

Once you open a window, the Menu Bar changes to include the **Edit** and sometimes the **Options** menu items as illustrated below.

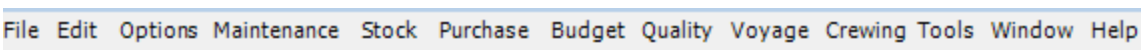
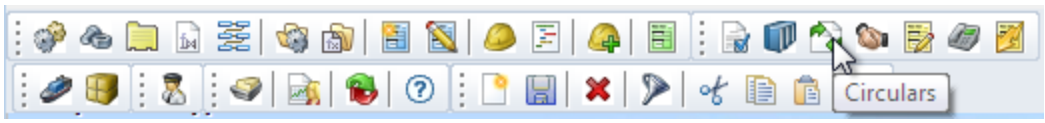


Figure 6 Extended Menu Bar

When your license does not include certain functionality, those menus will be 'greyed out'. Greyed out menus can be hidden by setting the parameter 'Hide Inaccessible Menu Entries' to TRUE.

2.3.3 The Standard Toolbars

The toolbar shown below is a combination of the all module toolbars:

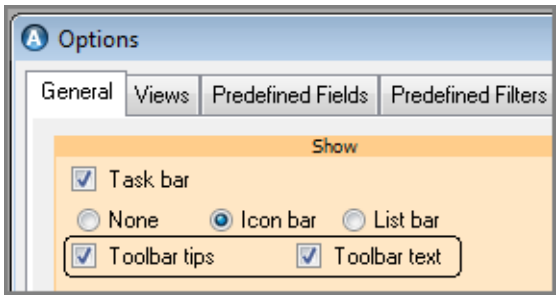


To set the toolbar's position:

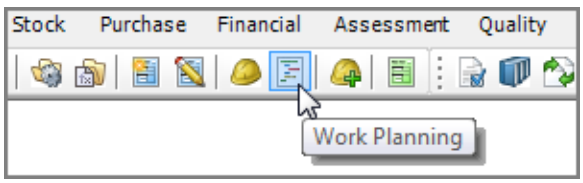
1. Go to **Tools > Options**.
2. Select an option - top, bottom, left, right or hidden - in the **Standard toolbar position** field on the General tab.
3. Click **OK**.

To activate toolbar tips and/or toolbar text:

1. Go to **Tools > Options**:



2. Flag **Toolbar tips**to turn on tooltips in the standard and window toolbars:



3. Flag **Toolbar text** to turn on text underneath the toolbar icons:



4. Click **OK**.

2.3.4 The Window Toolbars

When you open a window a window toolbar also becomes available. This toolbar can be different for each window: a combination of the basic functions of the File and Edit menus combined with the most used functions within the window's Options menu.

To set the toolbar's position:

1. Go to **Tools > Options**.
2. Select an option - top, bottom, left, right or hidden - in the **Window toolbar position** field on the General tab.
3. Click **OK**.

To activate toolbar tips and/or toolbar text: see section 2.3.3.

2.3.5 Customising Toolbars

You can decide where you want to locate the AMOS Business Suite toolbars. Right-click in the toolbar area to open the menu shown. The Standard Bar is the main toolbar, while the Window Bar is the secondary toolbar which is dependent on the window opened. You can select along which edge of the screen these are to be located, or you may select **Floating** to have the toolbars as floating palettes.

If you select **Show Text**, the buttons become bigger and display the names of the buttons. Finally, if **Show Tips** is selected, you will see tool tips below a button when you put the cursor on it.

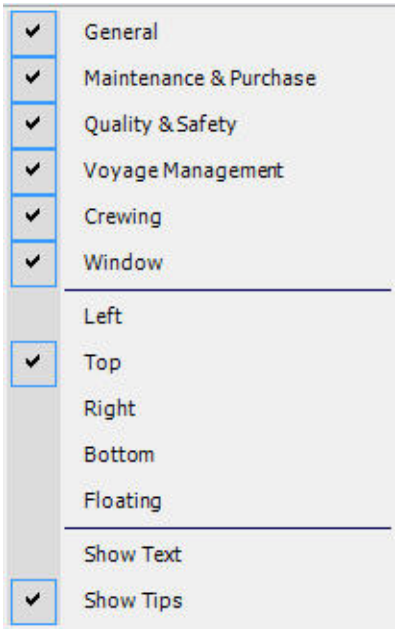


Figure 7 Customise Toolbar Menu

To choose from a more comprehensive set of options, go to **Tools > Options**. There are extra options in the application settings part of the screen. For example, you can choose the default window settings from the drop down list.

For more about the **Tools > Options** window, see the *AMOS Business Suite Reference Manual*.

2.3.6 Shortcut Keys

Many of the most commonly used commands within AMOS Business Suite can be accessed by pressing a single key on the keyboard or a combination of keys. These key combinations are called **Shortcut Keys**.

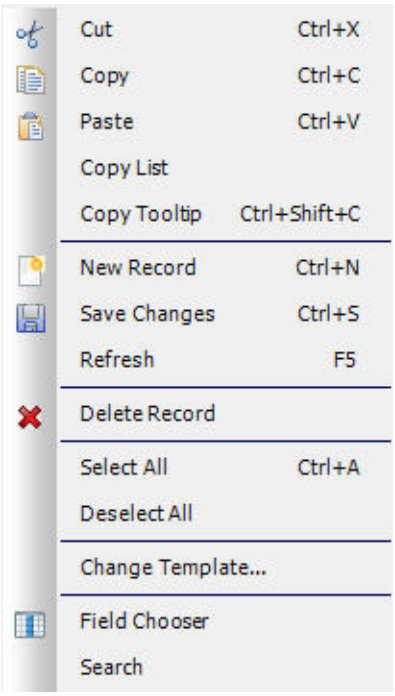


Figure 8 A Typical Edit Menu with Shortcut Keys

Wherever you see key combinations towards the right side of menu options, as above, you can use them as an alternative. If the shortcut takes the form of **Ctrl+?** or **Alt+?**, press the **Control** or **Alt** key and the key represented by the `**?**' at the same time.

NOTE: The availability of Keyboard Shortcuts depends on the currently active window and how the application has been set up at your installation.

2.3.7 Active Window Refresh

After you have changed the content displayed in a window, you might need to refresh the window so that the changes will take effect. There are three ways to refresh the contents of the active window without re-opening or re-filtering the window:

- go to **Edit > Refresh**, or
- right-click and choose **Refresh** from the pop-up menu, or
- press the **F5** key.

2.3.8 Lock Application

Locking AMOS prevents access to any currently open and in-use windows without actually closing the system.

1. Go to **File > Lock Application**.
2. The Login dialog will appear, with your ID greyed out. AMOS is now locked from use.
3. To continue this session re-enter your password.

To AMOS to lock automatically if left idle:

1. Go to **Tools > Options**.
2. Set the number of minutes for which AMOS can be idle before it locks, in the **Idle Time Out (min)**field.
3. Click **OK**.

Once the allotted time has passed, the windows will remain open but the logon dialog will appear and require you to enter your password.

2.3.9 Setting Dates With The Calendar

Double-click in any date field or press the **F2** key to open a calendar and select a date:



You can also type dates in manually: two digits each for the day, month and year separated with a space.

NOTE: The date format in AMOS is controlled by the default settings in your operating system. On a Windows based machine, open the Regional Settings function in the Control Panel.

2.3.10 Saving And Closing A Window

When you have finished with any changes, save your work:

- click the **Save** button in the toolbar, or
- right-click and select **Save Changes** from the pop-up menu, or
- press the **CTRL+S** keys.

To close the current window:

- click the red **X** button in the upper right corner of the window, or
- click the button in the toolbar, or
- go to **File > Close**, or
- press the **CTRL+F4** keys.

2.3.11 Exiting AMOS Business Suite

Before exiting AMOS, remember to save any changes you have made. Otherwise, you will be prompted to do so before you are allowed to exit. Then go to **File > Exit** to leave the application.

You can set AMOS to require a confirmation prior to closing:

1. Go to **Tools > Options**.
2. Flag **Confirm on Exit**on the General tab.
3. Click **OK**.

2.4 Common Features In AMOS Business Suite

2.4.1 Installations And Departments

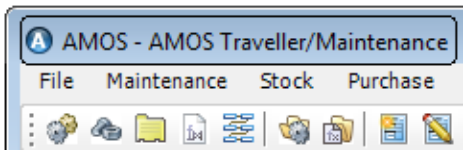
The AMOS Business Suite contains functions to handle complex organisations. You can divide your organisation into installations (any office or site where AMOS is installed) and divide these installations into departments. To view your company's list of defined installations and departments, select **File > Switch Department**. The Switch Department window only presents the departments the logged in user has access to.

It is important that before you begin any work in AMOS M&P, you check that you are in the correct department. The top line of the AMOS window shows Installation/Department. If you are not in the correct department, switch departments before doing anything else.

For instructions on defining new installations and departments, see the *AMOS Business Suite Reference Manual*.

2.4.1.1 Switching Departments

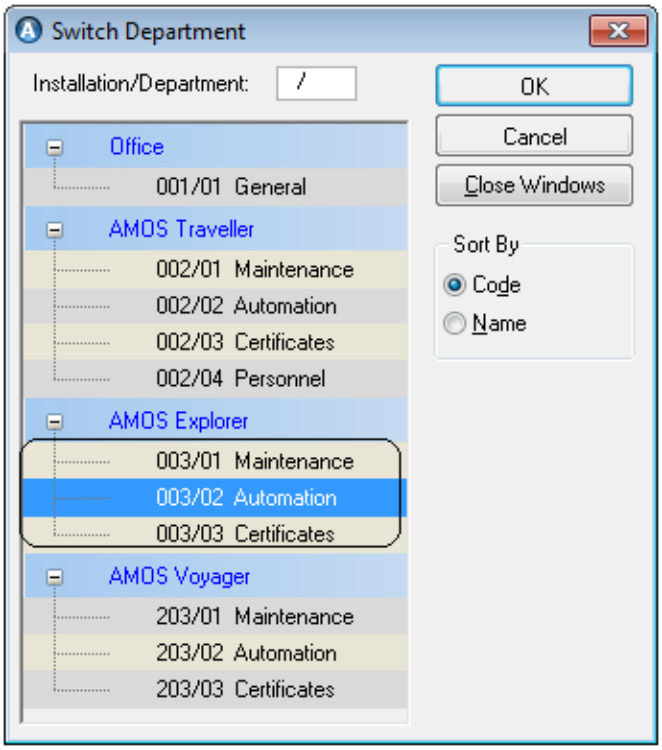
The top line of the AMOS window shows your current Installation/Department:



If you are not in the correct one, switch departments before doing anything else.

To switch installations/departments:

1. Close any open windows. Switching while windows is open is not possible.
2. Go to **File > Switch Department** or click the button.
3. Select an installation/department:



4. Click **OK**.

   If any windows are open click the **Close Windows** button first.

5. After a moment the new Installation/Department appears in the top line of the window.

2.4.2 Filters

Using filters you can define criteria for the data you want to retrieve, and narrow the resulting lists you need to search through to an extremely exact specification. At any time you can re-filter within a window by clicking the **Filter** button in the toolbar.

You can search for records by the way the text sounds: for example, entering a phonetic spelling of a person's name or address, or a piece of equipment, even if you do not know exactly how it is spelled.

Some fields in a filter may link to additional filters to enable you to more easily find the correct search criteria to add to the first filter.

To by-pass a filter and return all records available, click **OK**or press **Enter** without adding any search criteria to the filter.

2.4.3 Global Search

Many AMOS users are responsible for maintaining the same set of information and records across multiple installations - on all vessels or on a subset of vessels.

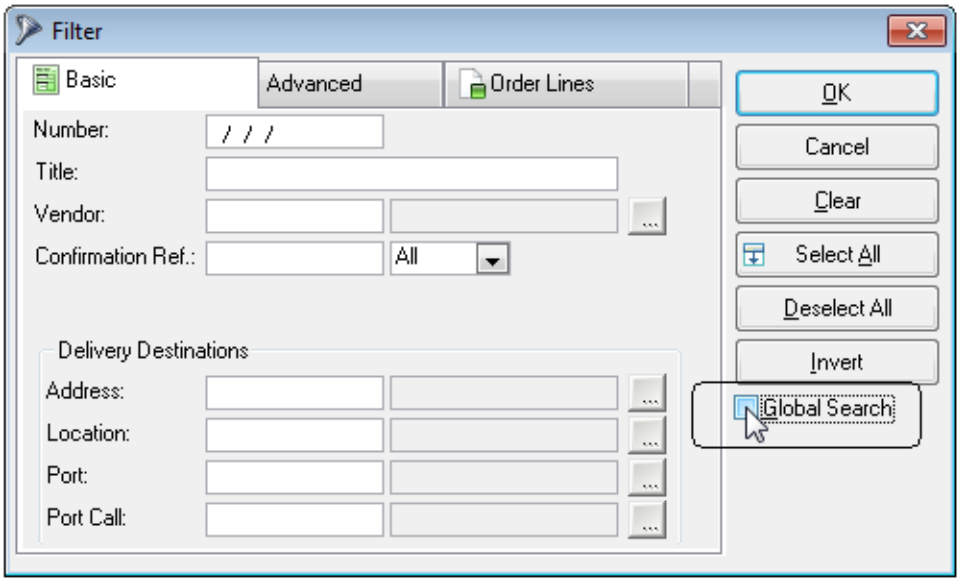
> **EXAMPLE**
>
> One Technical Superintendent is responsible for vessels A and B while another Technical Superintendent is responsible for vessels C and D;
>
> One Buyer is responsible for purchasing consumables on all vessels;
>
> One Purchase Manager is responsible for approving all purchases for all vessels; etc.

Working in 'Global' mode lets you filter for and view records at every flagged location [1] without having to switch installations first. Records matching the filter criteria from all the filtered installations/departments will be displayed in one window and can be processed there.

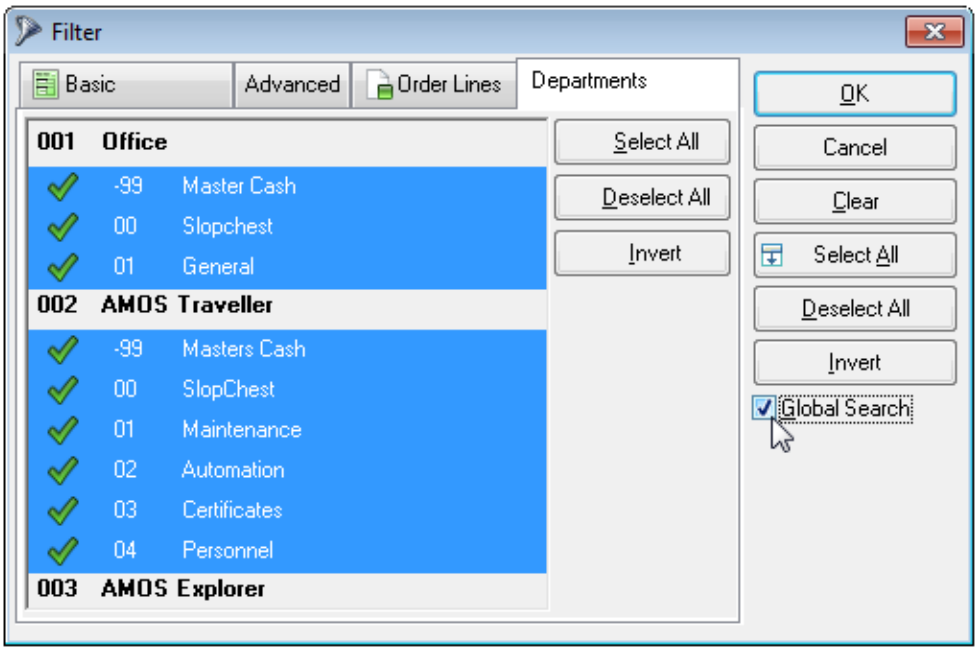
To activate global searching:

[1]When the system parameter 'Limit Global Search to Departmental Access' is set to TRUE, only the results belonging to departments to which you have access will be displayed.

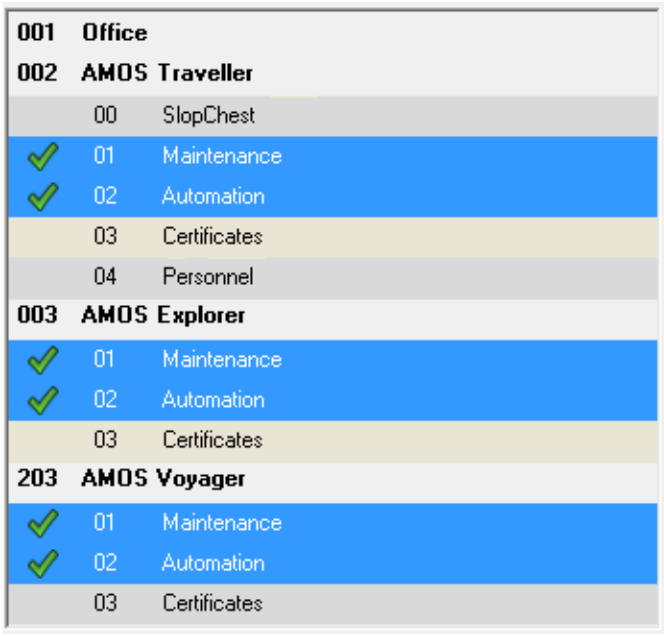
1. Flag the **Global Search** checkbox on the right side of the currently open filter:



2. The Departments tab will appear in the filter, showing all the installations/departments that you have access to:



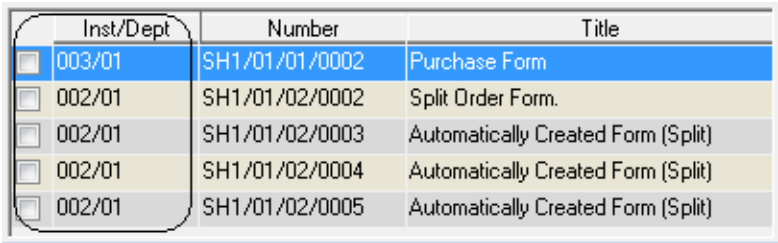
3. Flag installations/departments you want to search in the Departments tab:



> **TIP**
>
> Clicking on an installation header will select all departments within it. Hold the **Ctrl**/**Ctrl Shift** key and click on individual departments to select multiple locations, or use the **Select**/**Deselect All** and **Invert** buttons.

4. Click **Ok** when you are finished.
5. The resulting window will open in 'Global' mode.

The **Inst/Dept** column is added to the list part of a window in Global mode, showing you where each record came from:

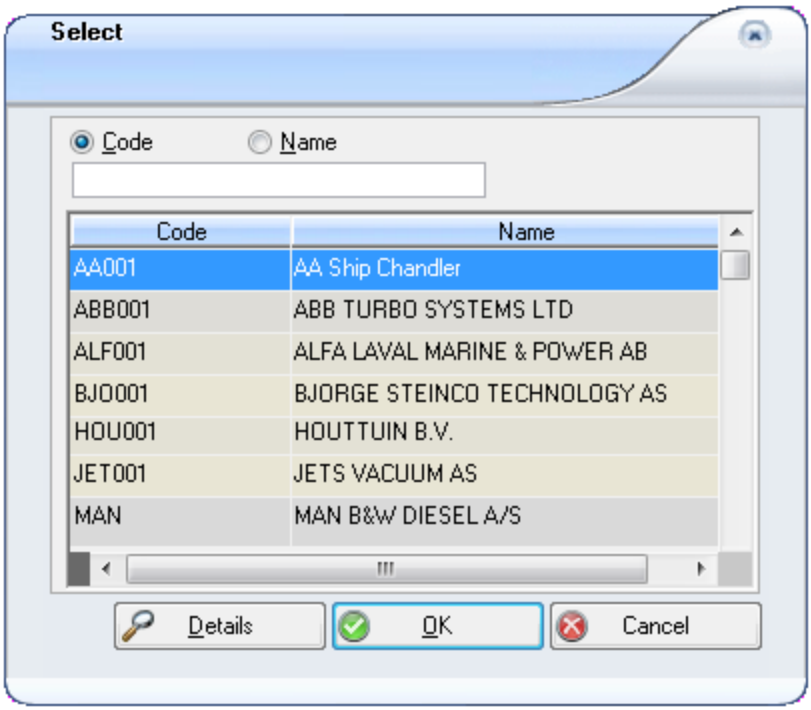


Inst/Dept	Number	Title
003/01	SH1/01/01/0002	Purchase Form
002/01	SH1/01/02/0002	Split Order Form.
002/01	SH1/01/02/0003	Automatically Created Form (Split)
002/01	SH1/01/02/0004	Automatically Created Form (Split)
002/01	SH1/01/02/0005	Automatically Created Form (Split)

2.4.4 Lookup Buttons


Lookup buttons appear next to fields throughout AMOS in windows and filters. Clicking the lookup opens a list of possible values: sometimes the lookup list has its own filter which opens first.

1. Search by either **Code** or **Name**:



2. As you type the selection moves automatically to the first matching record. Click **OK** to select a record.

Some lookup filters also have a **Details** button which opens more information about the highlighted selection.

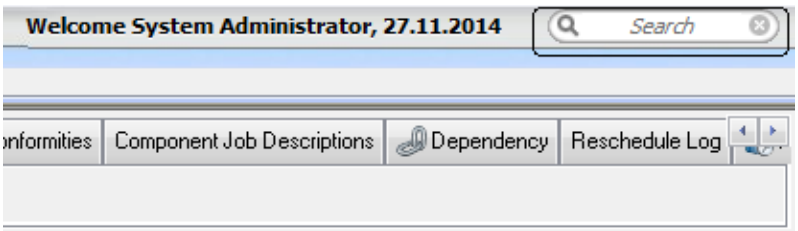
> **TIP**
> If you know the starting letter or number of the record you are searching for you can enter it into the field before clicking the lookup button. This restricts the look-up list to records beginning with the letter/number you entered.

2.4.5 Searching Inside A Window

Whether you have already filtered a window or not, you can search the listed records in a few different ways.

Quick Search

There is a **Search** field at the top right of the window title bar:



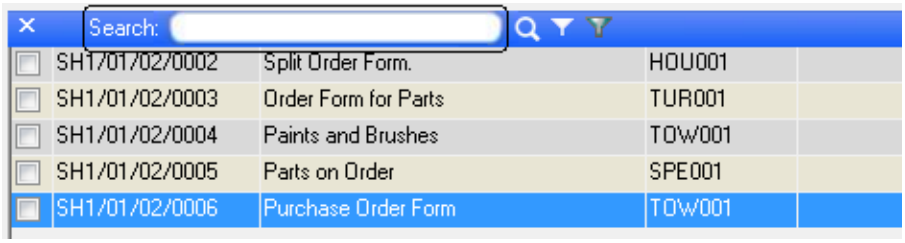
Type text into it and press **Enter** or click the magnifying glass icon. To clear it, click the **x** button. When the field is empty, pressing **Enter** again will return the full list of records in the window.

Press the **Shift** key and click in the **Search** field to open the extended search filter.

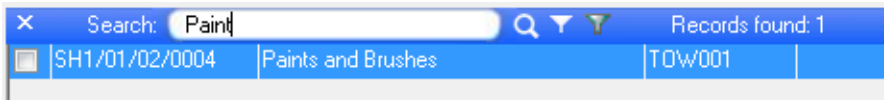
From the Edit Menu

1. Go to **Edit > Search**.

   This adds a **Search** field to the top left side of the list view:



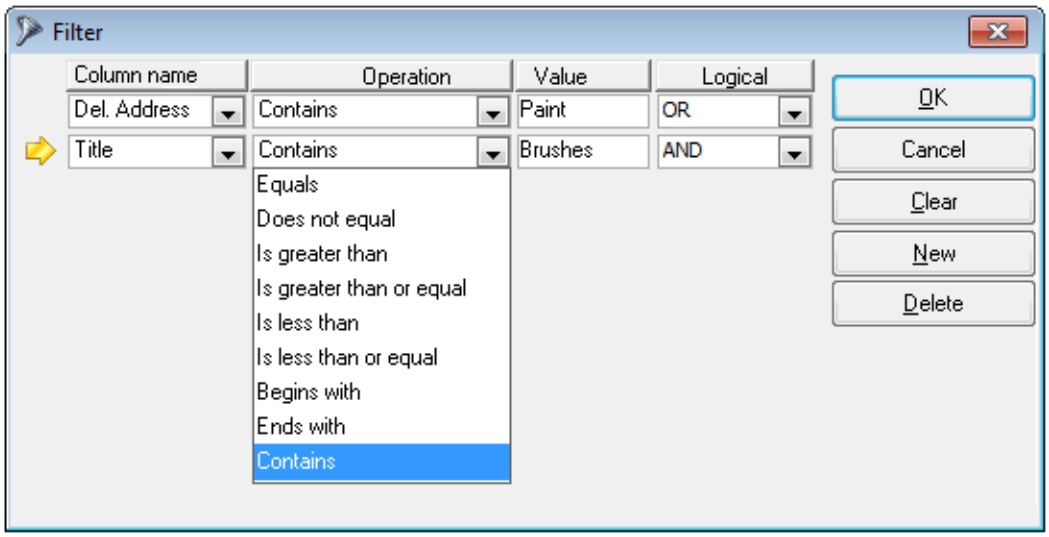
2. Type some text into the **Search** field and press **Enter** or click the magnifying glass icon to return results:



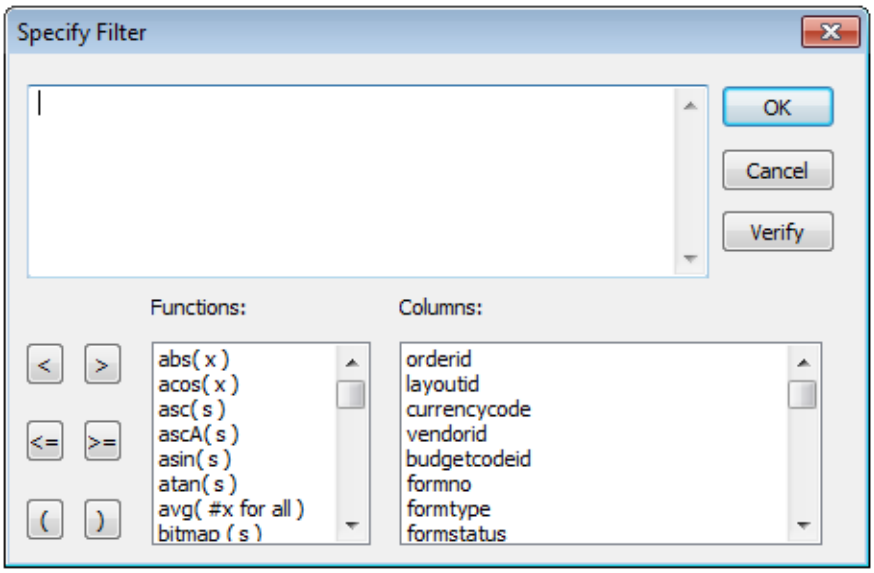
3. Clear the **Search** field and hit **Enter** again to go back to the previous full list.

Extended Search Dialog

From the list view **Search** field, click the white filter button to open an extended search dialog. From the quick **Search** field on the title bar, press the **Shift** key and click in the field to open the same dialog:

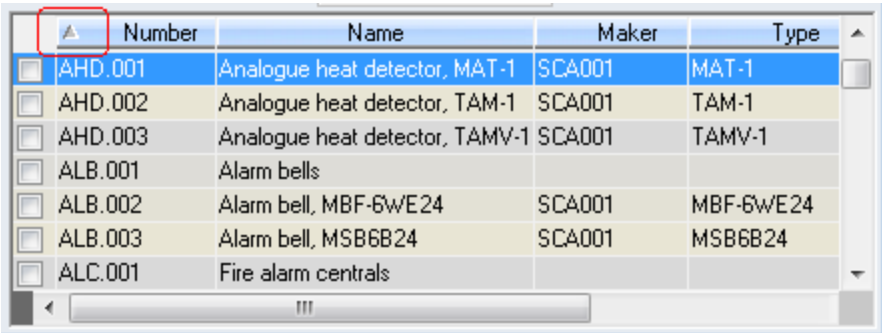


Or, click the shaded filter button on the list view to open an advanced search window:



2.4.6 Column Sorting

You can sort the records in the current window by clicking on the column headers. Once sorted, the column sort order is indicated by an arrow icon in the column header:



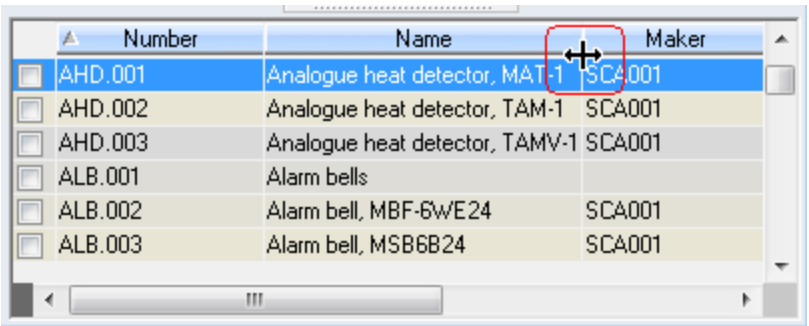
Number	Name	Maker	Type
AHD.001	Analogue heat detector, MAT-1	SCA001	MAT-1
AHD.002	Analogue heat detector, TAM-1	SCA001	TAM-1
AHD.003	Analogue heat detector, TAMV-1	SCA001	TAMV-1
ALB.001	Alarm bells		
ALB.002	Alarm bell, MBF-6WE24	SCA001	MBF-6WE24
ALB.003	Alarm bell, MSB6B24	SCA001	MSB6B24
ALC.001	Fire alarm centrals		

In most cases all the columns in a table are sortable. If an arrow is not present at the top of the column, then the column is unsorted.

2.4.7 Column Ordering

Sometimes window columns may not all be visible at the same time and the information in the columns may be cropped, even when the window has been maximised. To see the information you really want in a window, you can change column widths, and reorder columns by drag and drop.

To change the width of a column move the cursor to the side of the column header until the cursor changes to a bold vertical line with arrows on either side:



Number	Name	Maker
AHD.001	Analogue heat detector, MAT-1	SCA001
AHD.002	Analogue heat detector, TAM-1	SCA001
AHD.003	Analogue heat detector, TAMV-1	SCA001
ALB.001	Alarm bells	
ALB.002	Alarm bell, MBF-6WE24	SCA001
ALB.003	Alarm bell, MSB6B24	SCA001

Figure 9 Modifying Column Widths

Click and drag the cursor until you reach the desired column width.

To move a column to a different position place the cursor in the column header. When you click and hold, the column will become black. Drag and drop the column to a new position:

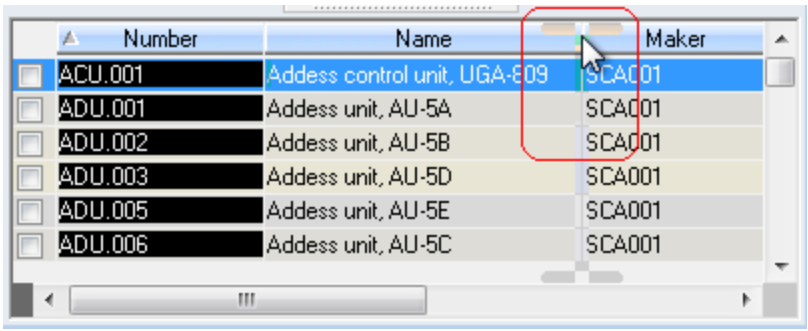


Figure 10 Moving a Column

NOTE: This does not permanently change the column order: after closing and re-opening the window the column order reverts to default. If you filter without closing the window, the reordered columns will remain in place.

To make a more permanent re-ordering of columns in a window you can save the window as a 'View' which you can select again and again through the 'Select View' function described in section 12.2.4.

2.4.8 Split Scrollbars

Depending on window size, the horizontal scrollbar at the window bottom has a vertical split line at the left side:

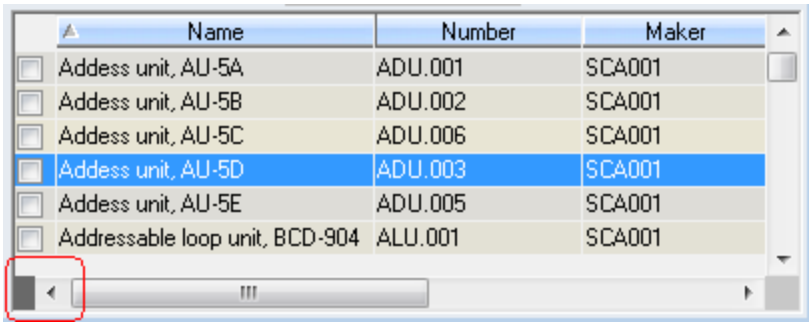


Figure 11 A split line in the list

This lets you divide the list area into two sections to scroll separately. Click on the split line and drag it to where you want to divide the list. Each pane will have its own scrollbar:

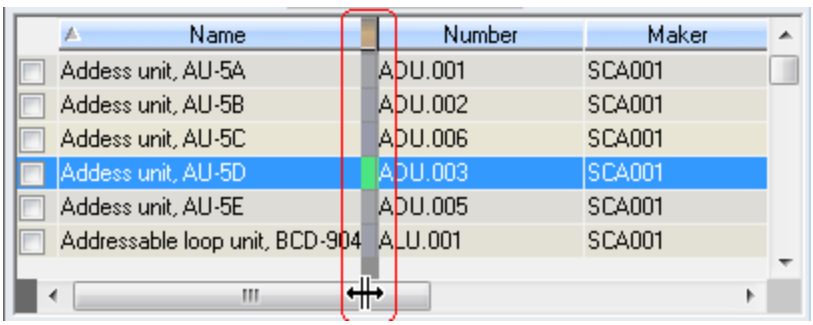
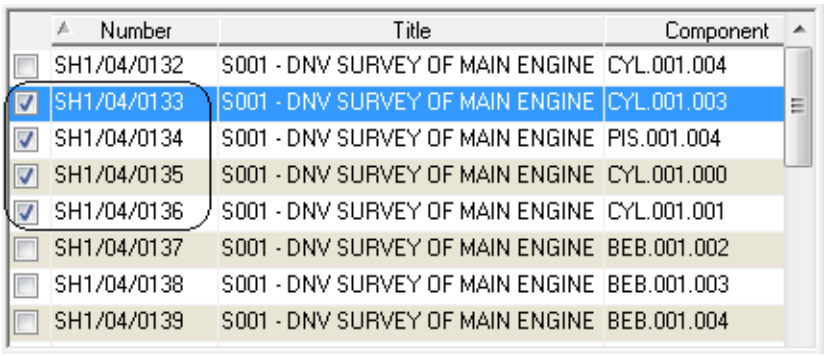


Figure 12 Dragging the split line

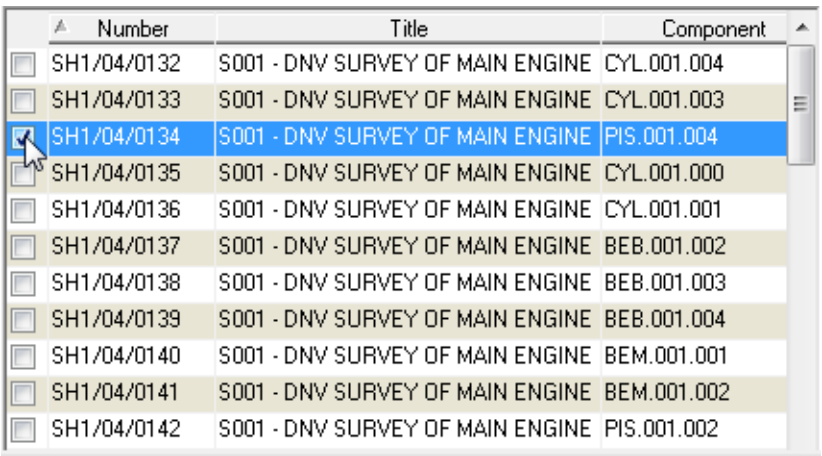
2.4.9 Multi-Selecting

To perform certain operations on multiple records at one time, tag the rows you want to work with:



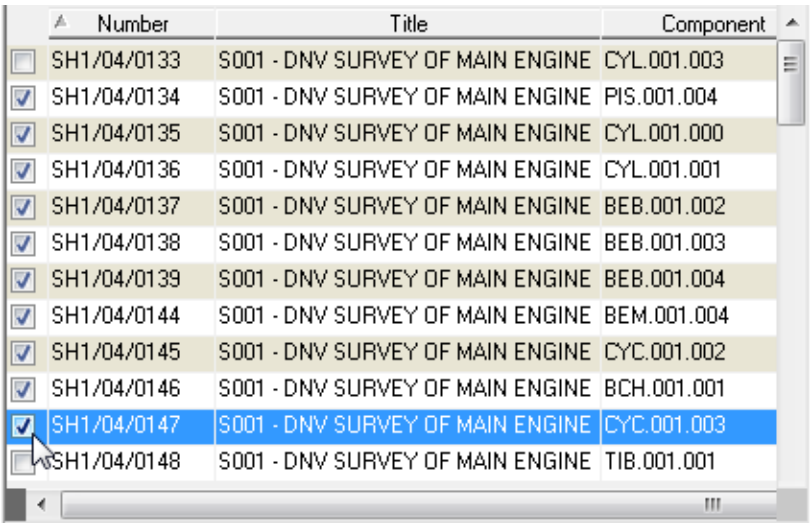
Number	Title	Component
SH1/04/0132	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.004
SH1/04/0133	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.003
SH1/04/0134	S001 - DNV SURVEY OF MAIN ENGINE	PIS.001.004
SH1/04/0135	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.000
SH1/04/0136	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.001
SH1/04/0137	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.002
SH1/04/0138	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.003
SH1/04/0139	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.004

To tag a large number of consecutive rows, tag the first row to select it:



Number	Title	Component
SH1/04/0132	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.004
SH1/04/0133	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.003
SH1/04/0134	S001 - DNV SURVEY OF MAIN ENGINE	PIS.001.004
SH1/04/0135	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.000
SH1/04/0136	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.001
SH1/04/0137	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.002
SH1/04/0138	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.003
SH1/04/0139	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.004
SH1/04/0140	S001 - DNV SURVEY OF MAIN ENGINE	BEM.001.001
SH1/04/0141	S001 - DNV SURVEY OF MAIN ENGINE	BEM.001.002
SH1/04/0142	S001 - DNV SURVEY OF MAIN ENGINE	PIS.001.002

Then hold the **Shift** key and click the last row you want tagged. This automatically tags all the rows in between:



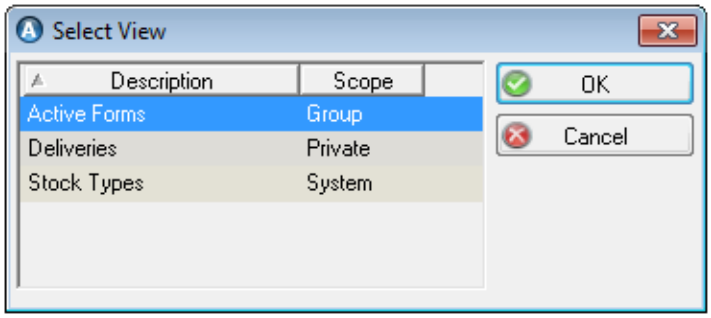
Number	Title	Component
SH1/04/0133	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.003
SH1/04/0134	S001 - DNV SURVEY OF MAIN ENGINE	PIS.001.004
SH1/04/0135	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.000
SH1/04/0136	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.001
SH1/04/0137	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.002
SH1/04/0138	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.003
SH1/04/0139	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.004
SH1/04/0144	S001 - DNV SURVEY OF MAIN ENGINE	BEM.001.004
SH1/04/0145	S001 - DNV SURVEY OF MAIN ENGINE	CYC.001.002
SH1/04/0146	S001 - DNV SURVEY OF MAIN ENGINE	BCH.001.001
SH1/04/0147	S001 - DNV SURVEY OF MAIN ENGINE	CYC.001.003
SH1/04/0148	S001 - DNV SURVEY OF MAIN ENGINE	TIB.001.001

2.4.10 Selecting Or Changing The View

Views are user-defined, frequently used screen configurations: a record of open screens, which screen is active, which filter criteria are defined and the sorting order applied in the window.

There are several ways to select and change the view as required. When you select a different view, it opens up in the place of the window you were in.

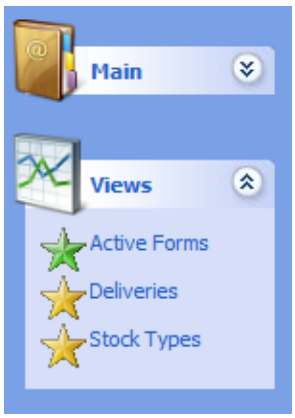
Go to **Tools > Select View** or press the **F6** key. The Select View dialog opens:



Choose a view in the list and click **OK**.

Or,

Select a view from the Views menu in the list bar/icon bar[1]:



Or,

Click the shortcut button on the top left corner of the task bar to open the Select View dialog.

This shortcut button opens the Options window to the Views tab, where you can configure views to add to your list.

2.4.11 Detailed Description Windows

Many of the windows throughout AMOS Business Suite include forms in which you can add free-text. Known as Details tabs/Full Description windows and accessed through the Options menu, these are intended for detailed descriptions of parts, jobs, functions etc. and general information for which there are no specific fields in the window. Templates can also be used to create special forms and define how the Details tab or window should look. Depending on the type of text editor which is selected for use, you can also attach documents, illustrations and other files to the tab.

There are two types of editor available for these windows. The editor available to you is determined by the parameters found in **Tools > Configuration > Parameters > Options > General > Editor**. These can be set to CLASSIC or ENHANCED for each module within the suite.

[1] If the list/icon bar is not visible, enable it in the Tools > Options > General tab by clicking the radio button for 'Icon bar' or 'List bar'.

NOTE: The same type of editor will be set on all Details forms in the selected module.

The Classic editor type

The Classic editor is a simple text editor. All input is made via the keyboard without any formatting options. The font style and size is set by the Editor Font parameter that is to be found in the same parameters folder as the Editor Type parameters.

The Enhanced editor type

The Enhanced editor is a rich text editor. It allows you to perform many of the formatting features available in common word processing applications. It is also possible to add tables and images to the detailed description window by using the context menu (right-click). Hyperlinks may also be added in this editor, but you should manually alter the appearance to create the standard hyperlink appearance (blue underlined text).

NOTE: If you switch from the classic editor to enhanced editor, any modified details screens will contain hidden formatting code. This formatting code will become visible if the editor is switched back to classic, and will be displayed as the first 5 or 6 lines when viewed. This formatting text must be removed manually.

NOTE: When text is present in a details window, the keyboard input language will change to the language of that text, if it is different from the set keyboard input language. If a details window is empty, the keyboard input remains on the set language.

2.4.12 Audit Trails

When an Audit Trail has been placed on one or more columns in a table in AMOS, every change made in the selected window/field(s) can be tracked: the original value, the new value, the date of the change made, the operation performed on that record (i.e. insertion, deletion or update), and the user ID of the person who made the modifications. The results of an audit trail can be viewed in the Audit Trail Log window. It is also possible to record all login activities on the system, in the Login Audit Log. Read about configuring Audit Trails and viewing the results in the *AMOS Business Suite Reference Manual*.

When an audit trail is configured to prompt for a reason when a user changes certain fields, the user cannot save the window in question until providing a reason for the change(s).

After changing/updating one or more fields requiring a reason, in an audited window:

1. Click **Save**. The Audit Trail Reason dialog opens.
2. The audited fields requiring a reason are listed in the bottom:

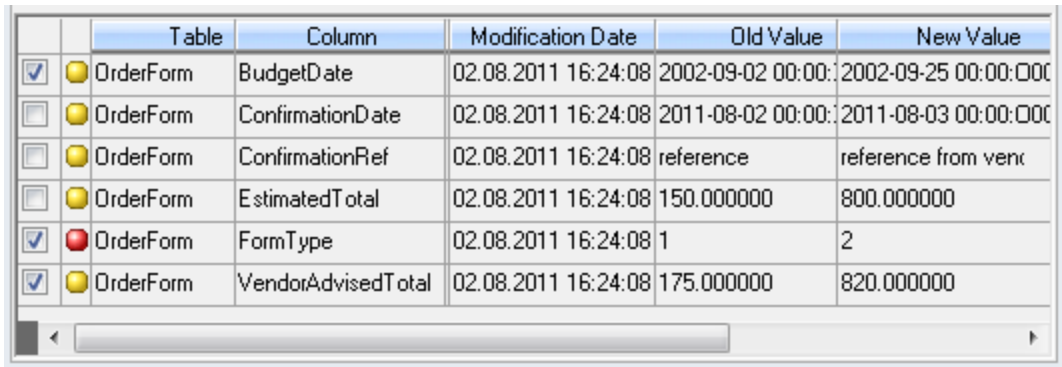


		Table	Column	Modification Date	Old Value	New Value
☑	🟡	OrderForm	BudgetDate	02.08.2011 16:24:08	2002-09-02 00:00:0	2002-09-25 00:00:00
☐	🟡	OrderForm	ConfirmationDate	02.08.2011 16:24:08	2011-08-02 00:00:0	2011-08-03 00:00:00
☐	🟡	OrderForm	ConfirmationRef	02.08.2011 16:24:08	reference	reference from ven
☐	🟡	OrderForm	EstimatedTotal	02.08.2011 16:24:08	150.000000	800.000000
☑	🔴	OrderForm	FormType	02.08.2011 16:24:08	1	2
☑	🟡	OrderForm	VendorAdvisedTotal	02.08.2011 16:24:08	175.000000	820.000000

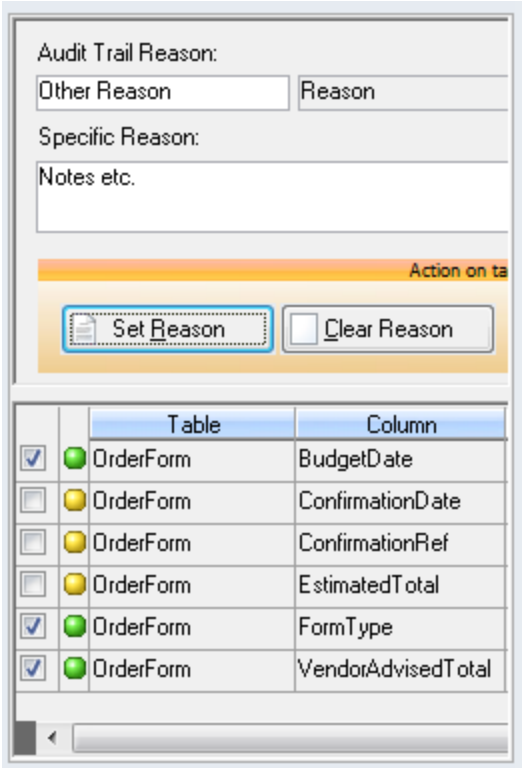
Fields where a reason is mandatory are marked with a red ball.

3. To apply the same reason to several fields at once, flag multiple fields.

4. Click the **Audit Trail Reason** lookup and select a reason code[1].

   If no reason codes are available/applicable, enter a free-text explanation.

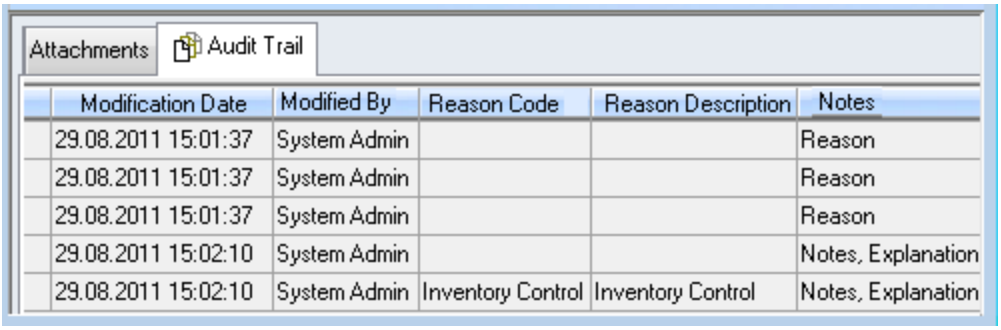
5. Click **Set Reason**. The icon beside each checked field will turn green for a valid reason.



   If there are more fields to supply reasons for, flag them and repeat.

6. Click **OK** to return to the main window.

7. The reason and any notes will be saved in the Audit Trail Log and in the Audit Trail tab on the audited window if applicable:



2.4.13 The Edit And Options Menus

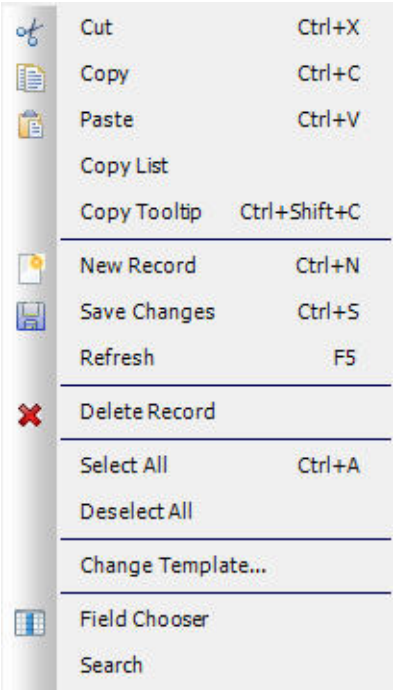
When you have opened a window in the AMOS Business Suite application the Menu bar will extend to show the **Edit** and sometimes, **Options** Menus. The items available in these menus will vary depending on the currently active window.

NOTE: A combination of these two menus also appears if you click the right mouse button whilst you are viewing an open window.

[1]The lookup is only active if reason codes are in use in the audit trail configuration.

2.4.13.1 The Edit Menu

The Edit Menu contains the basic tools for all AMOS Business Suite data windows, providing that there is editable information within the window. The Edit menu will contain some or all of the following:



Aside from the 'standard options', some other menu items include:

- **Copy List**. Copies the entire list part of the window - all currently displayed columns and content. The list is placed on the clipboard and you can paste it into another program like Word, Excel, Notepad, etc.
- **Copy Tooltip**. Copies the tooltip for the current window's title bar to the clipboard.
- **Select All/Deselect All**. Tag or un-tag the checkboxes next to every record in the window.
- **Change Template**. Changes the template on the Details tab/window. Changing a template may make it impossible to read existing information that has already been entered using a different template or without a template altogether.
- **Field Chooser**. Opens the Field Chooser window for selecting the fields to be shown in the list part of the window. Flag the fields you want to see. Unflag any you want to hide.
- **Search**. Opens a Search field in the top of the list part of the window for searching in the list. Hold the **SHIFT** key and click in the field to open an Advanced Search dialog, and enter further search parameters.

2.4.13.2 The Options Menu

The Options menu is specific to the currently active window within AMOS Business Suite. Remember that the functions on these menus can also be accessed by right-clicking the mouse.

As the Options menu is different for almost every active window, you will find descriptions of each menu option in the relevant sections and in the Options Menu Chapter at the back of the relevant User Guide.

2.5 Printing

2.5.1 Printer Setup

Select **File > Printer Setup** to view a list of the defined printers. The default Windows printer is used unless you select a different printer from the Printer Set-up window.

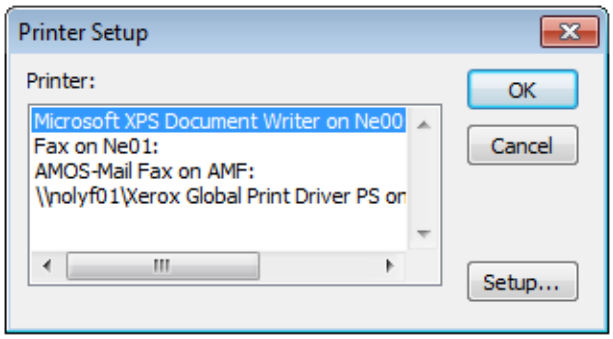


Figure 13 The Printer Set-up Window

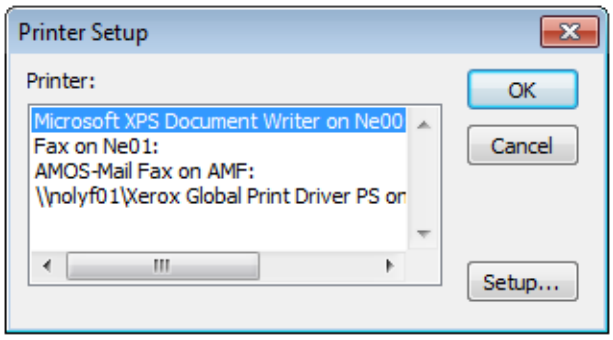
Click the **Setup** button to enter the Properties dialog box for the selected printer. The options available in this box depend on the printer and printer driver selected.

2.5.2 Print

To print the contents of the active window on the default Windows printer, go to **File > Print** or click the button on the toolbar.

To print on a different printer:

1. Go to **File > Printer Setup** or click the **Print** button on the toolbar and then click **Printer Setup** in the Print dialog:



2. Select a printer in the dialog.
3. Click **OK** to print from this printer.

To change printer settings like paper size and so on select a printer in the Printer Setup dialog and click **Setup...**.

2.6 The Database

Log files. The database can maintain log of every transaction, making it possible to regenerate a database after a crash. The log file should, if possible be on another disk than the database file. See the DBLOG command line utility or the Transaction Log.

Utility Backup. Usually, you cannot copy the database file when it is in use. There is a utility, called db backup, which performs a backup on a running database.

Utilities. It is possible to execute database commands from inside AMOS using the utilities **Execute SQL** and **Execute SQL (File)**. These are access controlled and available at **Tools > Utilities >** .

Password Scrambling. The password shown in AMOS's ini file is readable. Using the tool at **Tools > Utilities > Password Scrambling**, you can enter the current password and AMOS will provide a scrambled one for you to copy into the ini file, in its place. You can find the ini file in your AMOS Business Suite installation folder.

CHAPTER 3 The Registers

A register is a list of related information entered into a database.

> **EXAMPLE**
>
> A list of products and the companies that supply them, or the employees in your company and their addresses.

This information can be linked to other registers: for example to supplier names and addresses or next-of-kin and addresses, enabling you to search for specific details in the database. Normally this information is entered into the database manually, and the links are created when the program is developed.

Most of the registers are available at **File > Open Register >** . Some are also available from the **Tools >** menu.

Access control determines which user groups have access to each individual register.

3.6 Adding Data To A Register

The procedure for adding data to a register is similar for the majority of the registers, though some are more complicated than others.

1. Go to **File > Open Register** and choose the register you want to add a new item to.
2. Click the **New** button in the toolbar, or right-click and select **New Record** from the pop-

up menu, or press **CTRL+N** or go to **Edit > New Record**.

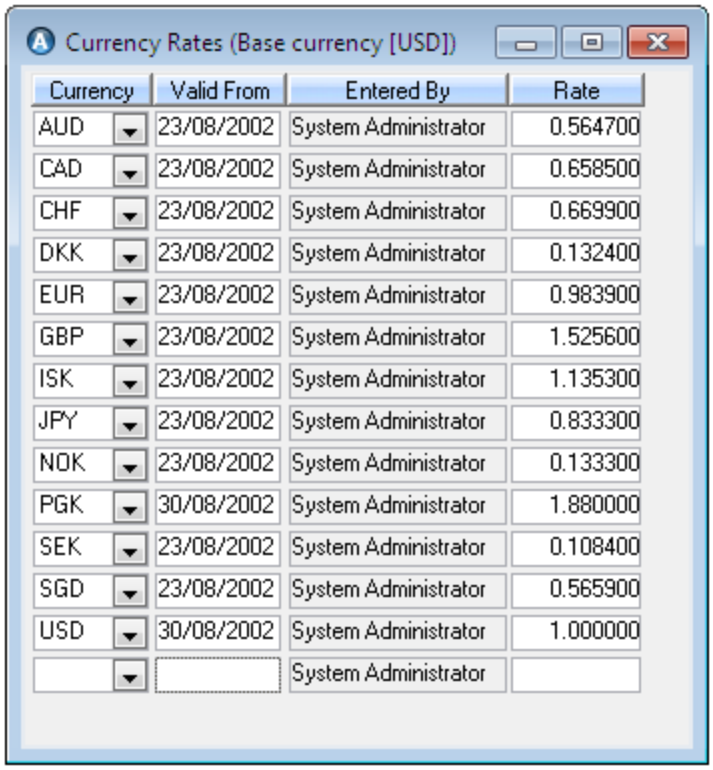


Figure 14 The Currency Rates register

3. Enter the required information into the appropriate fields.

NOTE: Information in drop-down lists is taken from other registers, so you may need to add data to other registers before you can complete the register you are currently working on.

4. **Save** the register. If you have made a mistake, close the register without saving.

3.6 Deleting Data From A Register

The procedure for deleting data from a register is similar for the majority of the registers.

1. Select **File > Open Register** and choose the register you to remove an item from.
2. Select a line in the register.
3. Click the **Delete** button on the toolbar, or go to **Edit > Delete Record**.
4. Confirm or cancel the deletion.
5. **Save** the register. If you have made a mistake, close the register without saving.

If the data you have deleted is used in another window then you will not be allowed to save the changes.

3.1 Addresses

File > Open Register > Addresses

The Addresses register is for storing information about all companies and persons with whom your organisation deals. In addition to contact information the register is also a valuable source of all the information required to create a quality evaluation of vendors, suppliers, agents and others you work with.

Go to **File > Open Register > Addresses** to open the filter for addresses or click the  toolbar button.

To create a new address record:

1. Click **New**.
2. Give the address a **Code** and **Name**.
3. Enter the address itself.

> **TIP**
>
> Select a **Parent Address** to place the current one under and create a hierarchy. For example, putting branch offices of the same company under the head office as 'parent' causes all the related addresses to be grouped together.

4. **Save** the address.

See the references below to read more about how AMOS uses some of the information you can define on an address record:

- **Portals**. See Chapter 25.
- **Minimum Order Values**. See *'Printing and Sending Purchase Orders'* in the *AMOS M&P User Guide*.
- **Output Formats**. See *'Printing and Sending Purchase Orders'* in the *AMOS M&P User Guide*.
- **Payment** and **Delivery Terms**. See section 3.10.3 and section 3.10.2.
- **Goods Receivable** addresses. See *'Deliveries'* in the *AMOS M&P User Guide*.

3.1.1 Products And Contacts

You can connect a list of products you buy from a vendor to the vendor address:

1. Select an address.
2. Open the Products tab.
3. Click **New** and select a product type[1]. Add as many as relevant.
4. **Save** the register.

Add one or more contact people to an address:

1. Select the address.
2. Open the Contacts tab.
3. Click **New**.
4. Fill in the details.

[1]The available choices come from the Product Types register.

5. Select 'Active' for contacts in use and 'Disabled' for old ones which are inactive, but you want to preserve the data.
6. **Save** the register.

3.1.2 Restricting Address Availability And Use

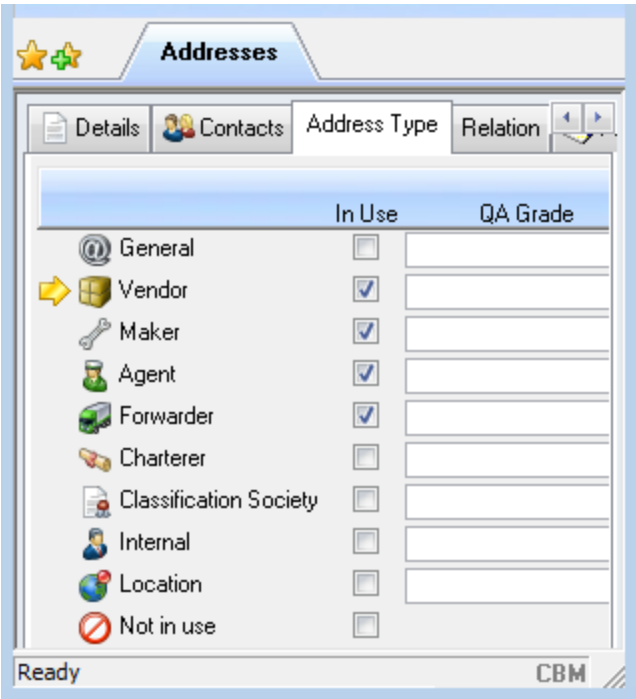
There are several ways to restrict address availability and use throughout your system:

- Defining address types. See section 3.1.2.1.
- Assigning QA grades on address types. See section 3.1.2.2.
- Assigning QA grades by stock on address types. See section 3.1.2.3.

3.1.2.1 Defining Address Types

You can select one or more 'types' for each address in the Address Type tab by flagging the 'In Use' box next to any which apply: vendor, maker, agent, classification society, etc.

Setting a type on an address limits its availability for selection in the system to only those places where it actually applies[1]: an address marked as type 'Maker' will not be available for selection from a 'Vendor' address lookup list.



- As soon as one or more types are flagged for an address, the address will only be available in lookups in the relevant areas.
- If you check several types including 'General', the address will be available system-wide.
- If you don't check any types at all, the address will be available system-wide.
- To prevent an address from use or selection anywhere in the system, flag the type 'Not in Use'. This cannot be checked without unflagging any other selected types first.

If several of your addresses share the same combination of types,you can define the list of types on all of them at once[2]:

[1] See APPENDIX B *'Address Type Lookup Limitations'* in this manual for a list of lookup fields within AMOS and the valid address types each one will display for selection.
[2] Access to this option is set on the Access Control window Functions tab > Common > Set Multiple Address Type.

1. Tag the addresses which have the same list of types.
2. Go to **Options > Set Address Type...**.
3. Check to *set* or uncheck to *clear* as many types as necessary.
4. Click **OK**. The same settings will be applied to all the addresses you tagged.

3.1.2.2 Assigning QA Grades On Address Types

You can restrict address selection even further by assigning QA grades to address types.

> **EXAMPLE**
>
> The same address is flagged as type 'Agent' and 'Vendor. With no QA grade at all, or an acceptable QA grade applied, this address will appear in Agent and Vendor address lookups system-wide. If you assign an unacceptable QA Grade on type Agent, the address will no longer appear in Agent lookups but will still be available in Vendor lookups.

To restrict availability using QA grades:

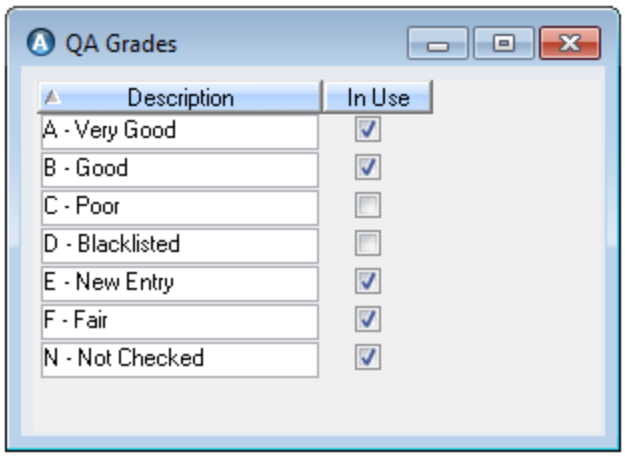
1. Define which QA grades are unacceptable.
2. Assign QA grades to the address types on each address.

Defining Unacceptable QA Grades

To define unacceptable QA grades:

1. Go to **File > Open Register > General > QA Grades**.
2. Uncheck the 'In Use' box next to an unacceptable grade. Addresses with such a grade applied will be unavailable for selection.

   Leaving the box checked next to a QA grade means addresses with that grade applied will be available for selection.

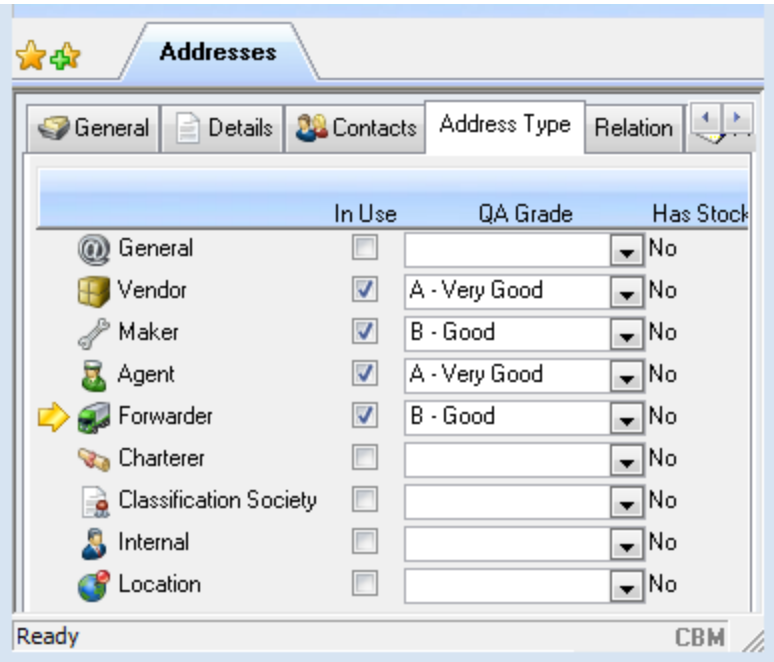


3. **Save** and exit the register.

Assigning QA Grades to Address Types

To assign QA grades to an address type:

1. Select an address and open the Address Type tab.
2. Flag the types **In Use** for this address.
3. Choose a **QA Grade** from the drop-down list next to each checked type.



To set a grade on one type but leave the address available for selection anywhere else in the system, flag the 'In Use' box next to General.

4. **Save** the register.

Purchase Forms and Blacklisted Vendors

Automatic Form Generation. When forms are generated from the Stock Wanted window the required items are grouped by preferred vendor, one form per vendor. If the preferred vendor address for any item has been assigned a blacklisted QA Grade making it unavailable, when generating order forms that item will be added onto a separate form with no vendor registered on it. The form will be titled 'Automatically Created Form' and contain an indication that the preferred vendor was not selectable.

Looking up a Blacklisted Vendor. Users with the correct access[1] will be able to lookup addresses with any QA grading, including unacceptable ones. Such users will see an additional lookup button next to the **Vendor** field on the Forms window and Quotations window. Clicking this button will open a vendor list which includes blacklisted vendors.

Existing Forms. If an existing form specifies a vendor who is later blacklisted, it will still be possible to add stock to that form.

3.1.2.3 Assigning QA Grades By Stock On Address Types

To even further restrict an address's availability, apply QA Grades onto stock classes and stock types/items available from each address type. When an unacceptable grade is defined against stock from a particular vendor address, selecting that vendor on a form containing any of those items will not be allowed.

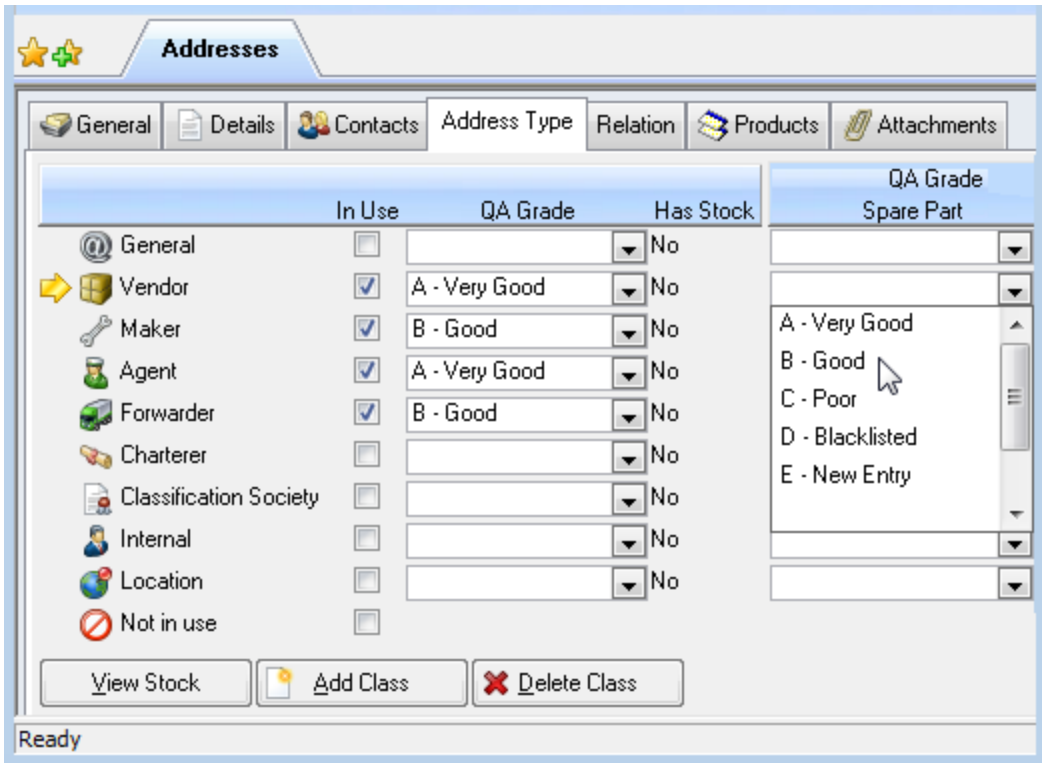
If you do not apply any grades to stock classes or types/items, the grade applied to the address type itself applies to all stock provided by that address.

[1] Access Control > Functions tab > Purchase - Allow Selecting Blacklisted Vendors

Assigning QA Grades by Stock Class on Address Types

> **EXAMPLE**
>
> The same address might have a good grade as a maker and vendor of the stock class 'spare types', but a poor grade as a maker and/or vendor of stock class 'consumables'.

1. Select an address and open the Address Type tab.
2. Flag the **In Use** address types for this address and assign general **QA Grades** to each type
3. Click the **Add Class** button.
4. Choose a stock class. The class appears to the right of the types list. Add as many classes as you need.
5. Assign a QA grade for the stock class(es) to any applicable checked address type.

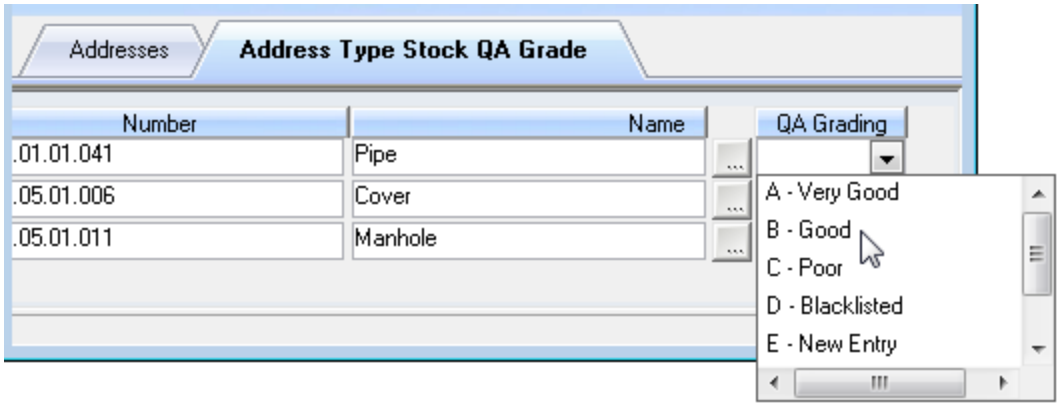


6. **Save** the list.

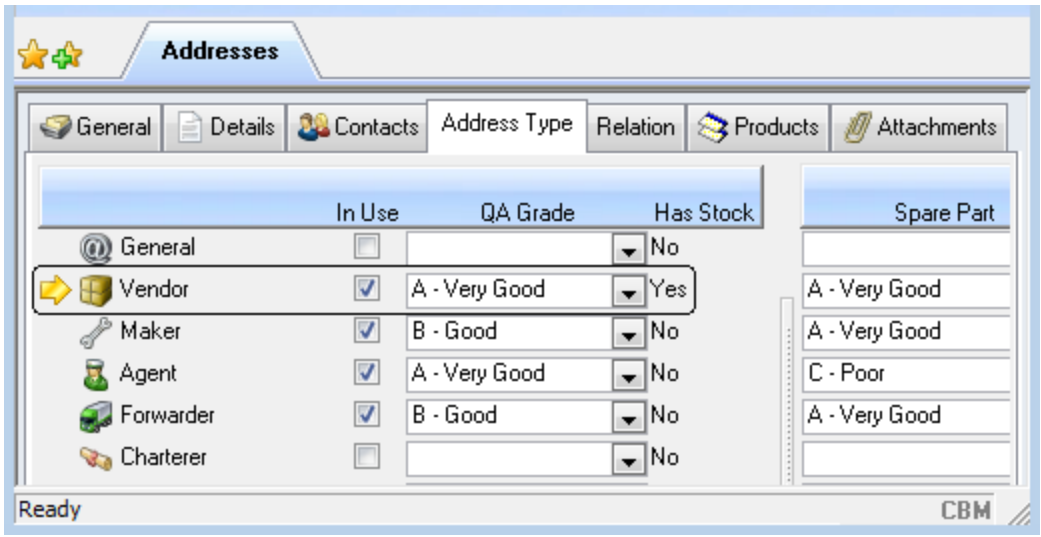
Assigning QA Grades by Stock Type/Item on Address Types

> **EXAMPLE**
>
> Perhaps the same vendor supplies good quality tools but very poor quality pumps.

1. Select an address and open the Address Types tab.
2. Click next to one of the types ' In Use' for the selected address. Click the **View Stock** button.
3. Select a stock type/item using the lookup button.
4. Apply a **QA Grading** to the stock. List as many types/items as applicable.



5. **Save** and close the window to return to the Address register.
6. Next to the flagged type, Yes will appear in the **Has Stock** column indicating that specific types/items have been listed and graded applying to the address when in use as this type:



3.1.3 Address Relationships

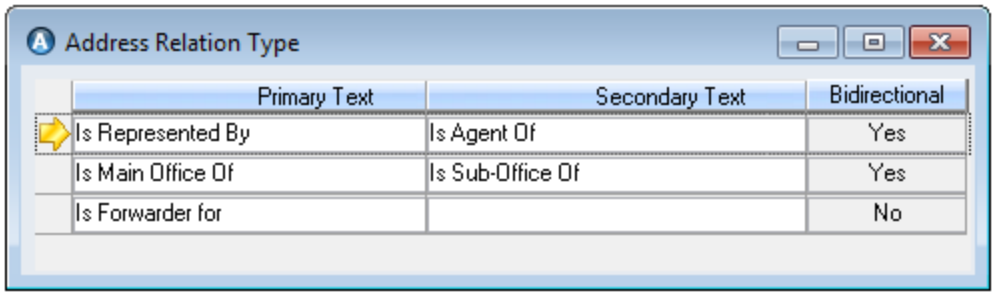
Many of your addresses may be related to each other in some way: head offices and sub-offices, agents and those they represent, etc. These relationships can be established in the Address register Relation tab. To link addresses by relationships:

1. Define the types of relationships available in the Address Relation Types register. See section 3.1.3.1.
2. Establish the relationships in the Address Register > Relation tab. See section 3.1.3.2.

3.1.3.1 The Address Relation Types Register

1. Go to **File > Open Register > Address > Address Relation Types**.
2. Click the **New** button on the toolbar.
3. Enter a relation type in the **Primary Text** and **Secondary Text** fields: for example, Is

Represented by/Is Agent of, or Is Main Office of/Is Sub-Office of.



Relationships are considered bi-directional. For example, the two addresses below are related bi-directionally with the primary/secondary text ' Is Main Office of/Is Sub-Office of':

Italy Office Address *Is Main Office of* Norway Office Address

Norway Office Address *Is Sub-Office of* Italy Office Address

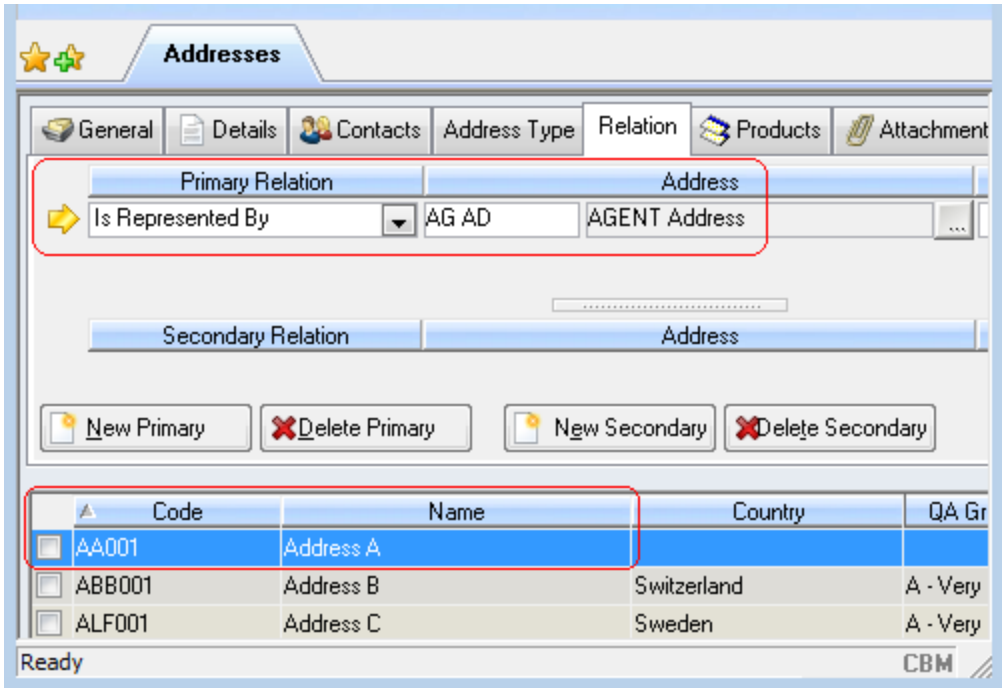
However you can specify that a relationship only goes one way, by entering the Relation Type text under Primary Text only and leaving Secondary Text blank.

4. **Save** and close the register.

3.1.3.2 Establishing Relationships On Addresses

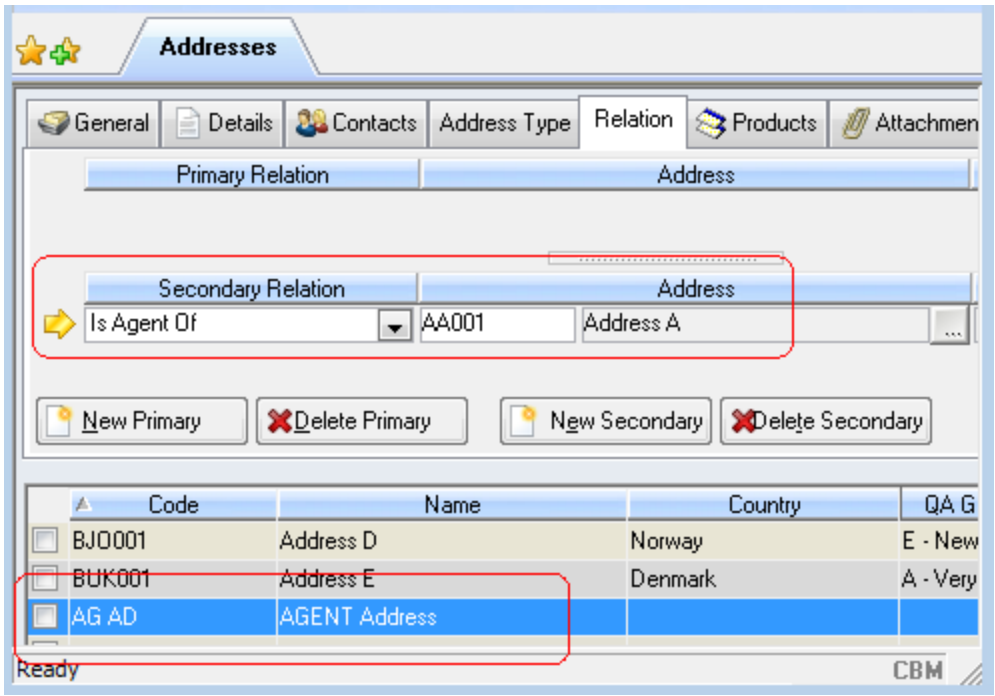
To establish relationships on addresses:

1. Open the Addresses register at **File > Open Register > Addresses**.
2. Select an address in the list part and open the Relation tab.
3. Click **New Primary**, and select the Primary Relation as defined in the Relation Type register, for example Is Represented by. Lookup the address of the agent representing the selected address. In the illustration below, Address A is represented by AGENT Address:



4. **Save** the register.

5. The related address will be updated with the corresponding relationship. Select the agent address in the list part of the window and open the Relation tab. In the example below, under **Secondary Relation** you will see that the selected address is defined as the Agent of Address A:



3.1.4 Locking And Unlocking An Address

Only authorised users are allowed to edit locked addresses. To lock/unlock an address:

1. Select it.
2. Go to **Options > Convert**.
3. Choose to lock or unlock it.
4. Click **OK**.

3.1.5 'Clean Up' The Register: Move References

If you think the same address has been registered multiple times:

1. Select a duplicated address.
2. Go to **Options > Move Address References**.
3. AMOS lists the rest of the addresses in your system.
4. Select an address to move the selected references to.
5. Click **OK**.

3.1.6 Address Category

File > Open Register > Address > Address Category

Define a list of categories for addresses for use in the main Address register.

3.1.7 Address Grouping

File > Open Register > Address > Address Grouping

Define a list of groupings for addresses for use in the main Address register.

3.2 Employees

File > Open Register > Employees

The Employees register is for storing information about the employees in your organisation.

NOTE: If your license includes the Personnel module, this register is superseded by the one found at **Crewing > Employee**. Creation of new employee records in this register will be disabled, although fields other than **Code**, **Last Name** and **First Name** will still be editable.

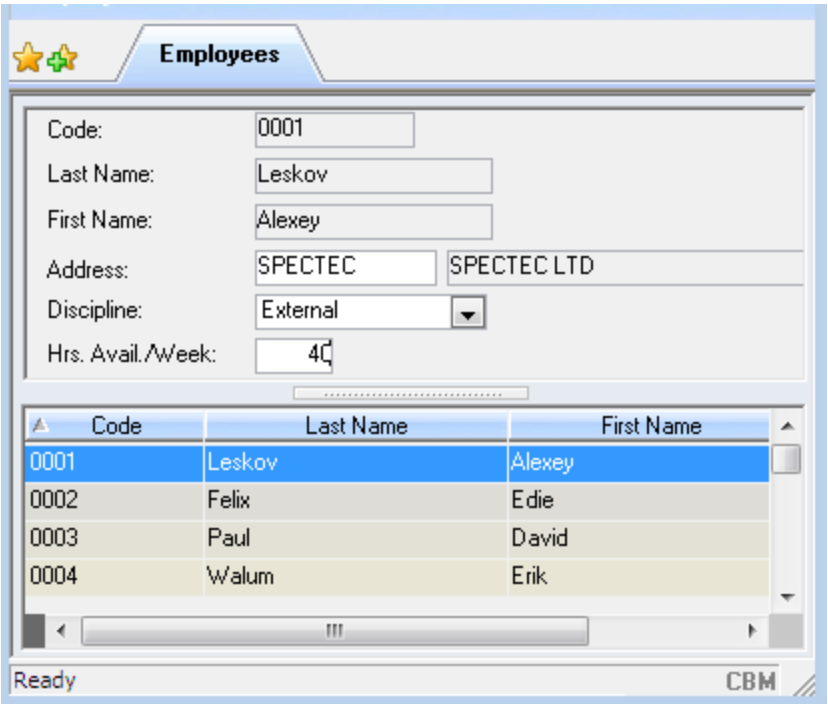


Figure 15 The Employees Register

To see the complete entry for an employee's address, select **Options > Address** to open the Address register.

Reporting Work by Employee

There are two ways to record Resources Used when reporting work[1]. AMOS can be configured to report maintenance work by discipline - i.e. mechanic, electrician, chief engineer, etc., - or by individual employee.

To report by employee, supply each employee's hourly rates in the Employees register > Additional Info. dialog[2]:

[1] According to the setting of the system parameter > Options > Maintenance > 'Log Work With Employee'.
[2] Requires that at least one each of the Employee User Defined Fields 'bonus1' to 'bonus4' and 'salary1' to 'salary4' are activated by defining appropriate labels.

1. Go to **File > Open Register > Employees**. Select an employee in the list.
2. Go to **Options > Additional Info**. A dialog opens.
3. Choose a **Currency** and define the **Basic** and **Bonus Hourly Rates**.
4. Click **OK** to exit the dialog. Select each employee and provide the same information.
5. **Save** and exit the register.

When reporting work, users can then select an employee in the Resources Used tab, and supply the hours spent per rate.

See the *AMOS M&P User Guide* > 'Reporting Work by Employee' for more information about configuring AMOS to report work by employee.

3.3 Locations

File > Open Register > Locations

The Locations Register takes the form of a hierarchy and is for defining various physical locations at an installation where components and stock items can be stored or located. The Components window contains a **Location** field and buttons with access to a selectable list of locations or a hierarchical list of locations.

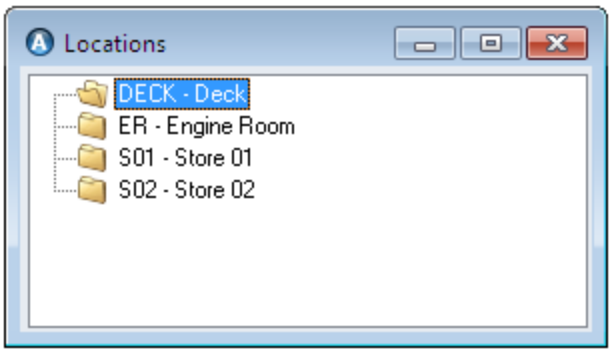


Figure 16 The Locations Register

To define a new location:

1. Enter the Locations Register and click the **New** button in the toolbar.
2. In the Locations Details dialog, enter a **Code** and a **Name** for the location.
3. If the location is to become a location at the highest hierarchy level, check the **Root Location** box. If you do not check the Root Location checkbox, the new location will be registered as a sub-location of the currently highlighted location.

You can search the register for strings of numbers and/or letters. Press the **F3** key or go to **Options > Find** to open the Find window.

3.4 Currency Rates

File > Open Register > Currency Rates

AMOS Business Suite can handle amounts in several currencies simultaneously. One currency is defined in the system parameters as the Base Currency.

The Currency Rate register is for setting up and updating the rate of each currency used in your organisation compared to the specified Base Currency Rate. When the rate is created, the field **Entered By** displays the initials or name of the user who has performed the task.

- Enter the currency rate as the comparative value of one unit of currency against one unit of the base currency. For example, perhaps one unit of GBP (British Pounds) is worth 1.3765 units of the base currency (USD) whilst one unit of YEN (Japanese Yen) is worth 0.0079 units of the base currency (USD).
- When you register a new currency rate, the **Currency** drop-down list displays the values of the Currency Codes register.
- Each time you update an existing currency rate, create a new entry for the same rate. This preserves the historical information belonging to the already existing rate. When you create a new record for an already existing currency rate, the old rate is replaced in the register by the newer one upon saving.
- Select **Options > Show All** to display all rates entered to date. There is a corresponding toolbar button.

3.5 Permits To Work

File > Open Register > Permits to Work

The Permits to Work register is for storing and maintaining any special information or forms required to be read or completed prior to carrying out work.

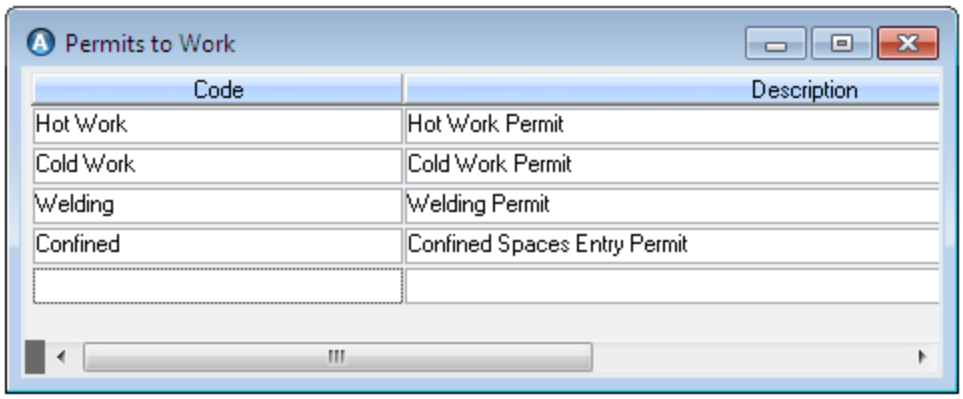


Figure 17 The Permits to Work Window

- Give each Permit to Work a unique **Code** and a **Description**.
- Select the instructions or form to connect to the Permit to Work from the **Layout** drop-down list. This will be displayed when you double-click the permit in the Work Orders window. The available layouts are listed in the Templates register.
- The Options menu for Permits to Work contains the single command Details. Use this menu option to preview the form or instructions selected in the Layout column for each permit.

3.6 Vessel Details

File > Open Register > Vessel Details

This register contains the basic details of each vessel, such as its name, dimensions, tonnage etc.

The General tab contains details about the selected vessel, such as **Type**, **IMO Number**, **Tonnage** and **Dimensions**.

The greyed-out fields fetch their data from the information you fill in on the Log tab. The Log tab contains the life history of the selected vessel, from construction onwards.

3.7 General Registers

AMOS Business Suite contains a number of smaller registers for storing values that are tailored to your organisation. Typically, drop-down lists in other windows allow users to select from a list of the registered values. For example, the Components window contains the **Unplanned Maintenance Template** drop-down list. This drop-down displays the entries defined in the Templates register.

To open a general register, go to **File > Open Register > General**.

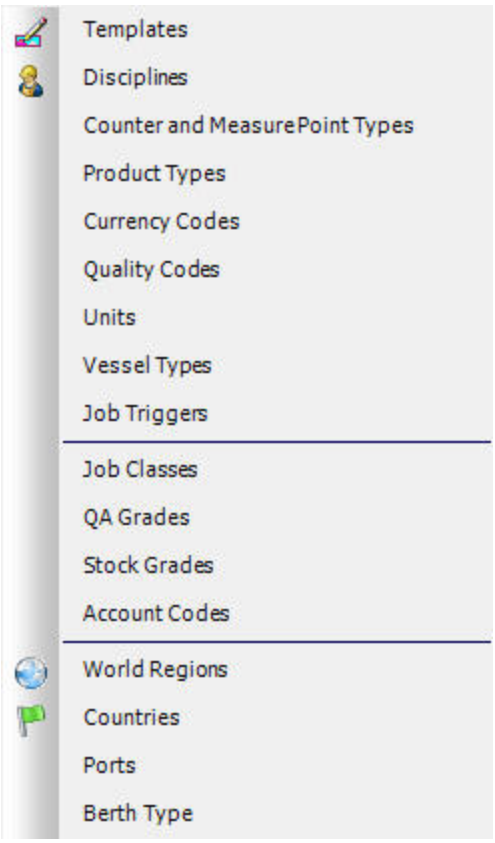


Figure 18 The General Registers

Most general register windows are fairly simple, and usually do not have an associated Options menu. The **Edit** menus contain similar commands to those found on the secondary toolbar: It is possible to create a new record or delete an existing one, to save changes, and to use the cut, copy and paste functions.

3.7.1 Templates

File > Open Register > General > Templates

Various documents used in AMOS Business Suite require different layouts. Creating Templates provides the ability to customise the presentation of the Details tabs/Full Description windows found throughout AMOS Business Suite. When a template is selected in a particular window, the user will then be presented with a form that may contain drop-down lists, selection boxes, input fields and other controls, upon opening the Details tab/Full Description window.

To utilise templates:

1. Create a form definition in PowerBuilder or the Form Designer window.
2. Connect the definition to a unique template **Code** and **Description** in this register.

To create a record in this register and connect a template to it:

Click the **New** button on the toolbar to get a blank line, and enter a **Code** and **Description** for a new template. Then go to **Options > Import** to connect a form definition to the selected Template record.

Check the **Obsolete** checkbox in the event that an existing template is out of use, and this will remove it from drop-down lists in the system, thereby preventing future selection and use of that template.

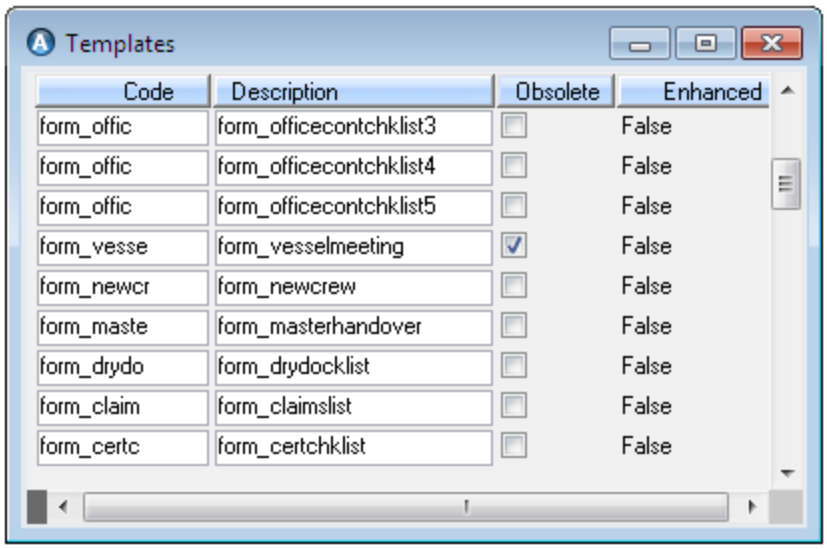


Figure 19 The Templates register

You can also convert normal templates to enhanced using the Options menu: whether a template is already enhanced or not is indicated in the **Enhanced** column. The original template can be marked Obsolete in the process to disable future selection.

See Chapter 27 in this guide for information on:

- Creating forms in the form designer,
- Connecting form definitions to the template codes, and
- Converting templates from basic to enhanced, and assigning access.

3.7.2 Disciplines

File > Open Register > General > Disciplines

The Disciplines register is for defining various labour functions. Once this has been done, costs may be tracked by disciplines, for example. It is possible to check a discipline as **External**:

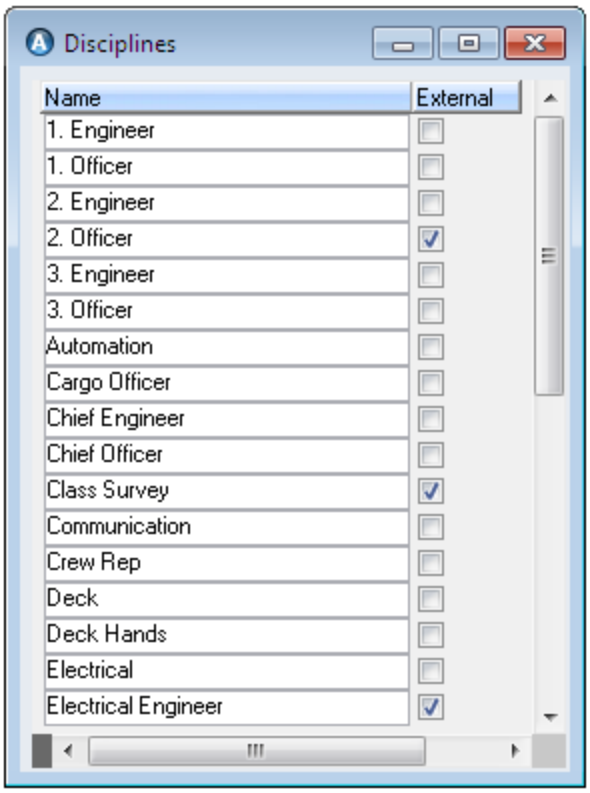


Figure 20 The Disciplines Register

External disciplines are indicated in drop-down lists throughout the system with the character *. For example, the filter for work orders contains an **Only Disciplines** list that differentiates between internal and external disciplines.

External disciplines are used in conjunction with work orders if you wish to purchase those services externally.

3.7.3 Counter And Measure Point Types

File > Open Register > General > Counter and Measure Point Types

The Counter Types register is for defining the different types of counters and measure points that handle periodic maintenance jobs and condition based maintenance. The **Max.Per Day** indicates the maximum value that AMOS will allow the user to input. This is used to prevent mistakes during counter/measure point updating.

According to your selection in the **Max Per Day Check** field, AMOS will perform the check against:

- the average number of hours per day since the counter's start date.
- the average and the number of hours since the last counter update.

It is also possible to create a type of counter called a Composite Counter. This is a counter that is a function of other existing counters linked together, with a formula:

Counter1 = Number of Startups

Counter2 = Running Hours

Counter3 (Composite) = Counter1 * Constant + Counter2

To define a Composite Counter select it as the Type, and then use the lookup button to enter an **Expression** which defines the Composite Counter. AMOS will read the expression like any other counter.

3.7.4 Product Types

File > Open Register > General > Product Types

The Product Types register is for defining different categories or types of products. This information may be used in searching in the Addresses register and linking the addressee to specific Product Types.

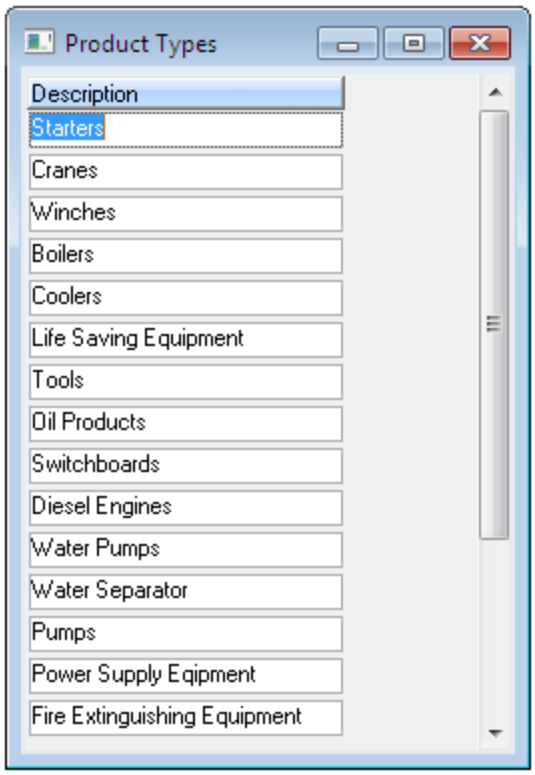


Figure 21 The Product Types register

3.7.5 Currency Codes

File > Open Register > General > Currency Codes

The Currency Codes register is for storing information about which currencies your organisation uses. The related Currency Rates register is for entering new and updated exchange rates between the currencies as changes occur.



Figure 22 The Currency Codes register

3.7.6 Quality Codes

File > Open Register > General > Quality Codes

The Quality Codes register is for creating and storing the available options for use in the Quality Check and Claims function during the receipt of line items.

When a Quality Claim is eventually closed, the user will select a predefined Resolution Code to indicate how the claim was settled. Quality Resolution Codes are defined in the Quality Resolution Codes register, and can then be linked to Quality Codes, here. This narrows the selection of resolutions for the user according to the Quality Code already applied to the Claim - only linked resolutions will be available. If you do not link any resolutions to a particular Quality Code then all defined resolutions will be available on Claims referencing that code.

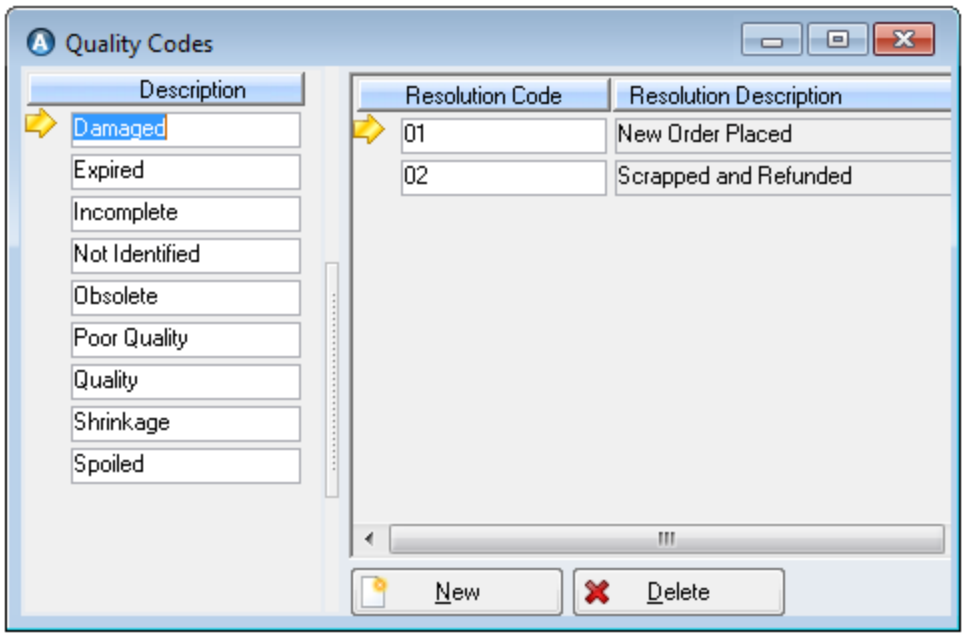


Figure 23 The Quality Codes register

3.7.7 Units

File > Open Register > General > Units

The Units register is for defining the various quantity units typically used for stock items. The units registered here will be listed in the **Stock Units** drop-down list in the Stock Items window, if the 'Use Stock Types' parameter is set to TRUE. If the parameter is set to FALSE, the values from the Units register will not be available in the list.

Checking the checkbox in the column **Decimals** indicates whether decimals can be used in combination with the selected unit of measurement.

In the right hand side of the window, are three columns called **Source Unit**, **Conversion Expression** and **Formula**. Select a unit in the **Name** column, and using the lookup button choose a Source Unit to convert to, and enter an expression that results in the appropriate conversion. The resulting formula will appear automatically in the **Formula** column when the record is Saved.

3.7.8 Vessel Types

File > Open Register > General > Vessel Types

This register defines the types of vessel owned and/or used by your company. This information is used in the **Vessel Details** register window.

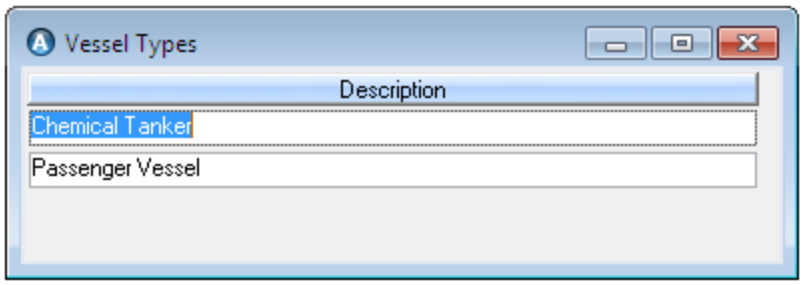


Figure 24 The Vessel Types register

3.7.9 Job Triggers

File > Open Register > General > Job Triggers

Triggers schedule jobs that must be carried out at certain intervals. For example, Weekly may be defined as a trigger for tasks to be carried out every week. They can also be used to schedule jobs which should be handled when a specific event occurs. For example, 'Pilot on board' may be a trigger for jobs to be carried out when a pilot enters a vessel.

This register is for defining these job triggers. These triggers can then be linked to a procedure or component job.

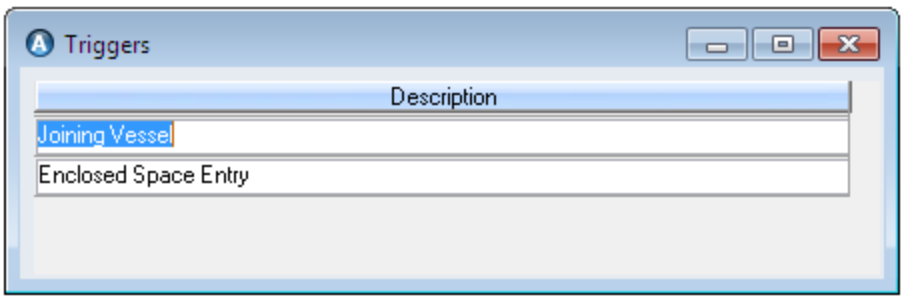


Figure 25 The Job Triggers register

3.7.10 Additional Cost

File > Open Register > General > Additional Cost

Use this register to define types of Additional Costs for purchasing such as Shipping, Insurance, etc. These costs are surplus to the actual cost of an item ordered for stock. Additional Costs registered here will then become available for use on Order forms, Quotations and Vouchers in the Additional Cost tab on those windows and users can select which costs to add and enter the estimated and actual values. Additional Costs can be manually added to or removed from forms, quotations and vouchers.

You can assign each additional cost entry to a budget code here; as long as an active budget exists this code will appear in the Additional Cost tab by default when a user adds the additional cost. Budget Codes can also be changed or assigned in the Additional Cost tabs directly. If no code is defined or an active budget does not exist for the selected code, the additional cost will be assigned to whichever budget code is defined on the form header.

Check the **Default** checkbox to automatically display the Additional Cost code on new Order forms and Quotations. Costs defined to appear on Forms and Quotations by default can still be removed by the user.

3.7.11 Job Classes

File > Open Register > General > Job Classes

The Job Classes register is for creating and storing the available classes attached to **Job Descriptions**. When you create a Job Description you must give it a class that reflects the type of work being carried out. Various maintenance window filters can use the available Job Classes to restrict the information presented on screen. Note that if you are using Workflow for maintenance or quality, there will be two extra columns to the right of the Job Class Name to allow you to define the **Initial WorkFlow Status** for that job class, and the **Initial Lock Type** for that Job Class.

Further information on Job Descriptions is found in section 3.8.1.

3.7.12 QA Grades

File > Open Register > General > QA Grades

The QA Grades register is for defining various quality assurance grades to assign to makers and vendors, etc. For example the Stock Items window Options menu contains the commands **Vendors** and **Preferred Vendor** and these windows contain fields that display the quality grading.

QA Grades can be assigned to Addresses and Address Types in the Address register, to indicate that a particular address is a reliable (or unreliable) vendor, maker, agent, etc. This lets you restrict addresses from selection throughout the system according to their QA Grade: as long as the **In Use** box in the QA Grades register is checked for a QA Grade, it means addresses with that grading applied will be available for selection. To prevent any addresses with a certain grade from appearing - i.e. Blacklisted, Poor, etc., - uncheck the In Use box on those grades here. When one of those QA Grades is applied in the Address register, the address will then be automatically unavailable for selection.

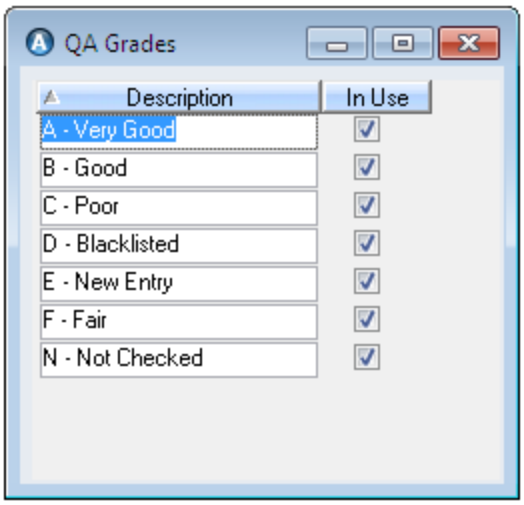


Figure 26 The QA Grades register

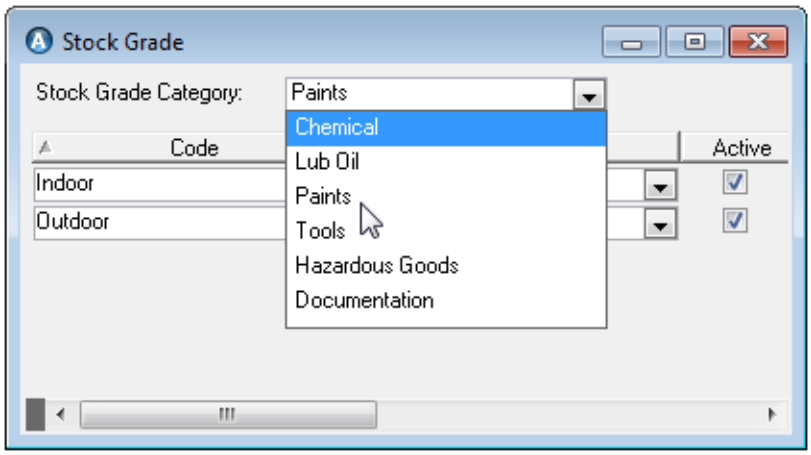
3.7.13 Stock Grades

File > Open Register > General > Stock Grades

The Stock Grades register is for adding supplementary information to stock items. Grades are defined here and then applied to stock types and so inherited on stock items. When stock with a grade defined against it is placed on a purchase form as a line item, the stock grade is copied to the form.

To define a stock grade:

1. Select a **Stock Grade Category**[1] from the drop-down list:



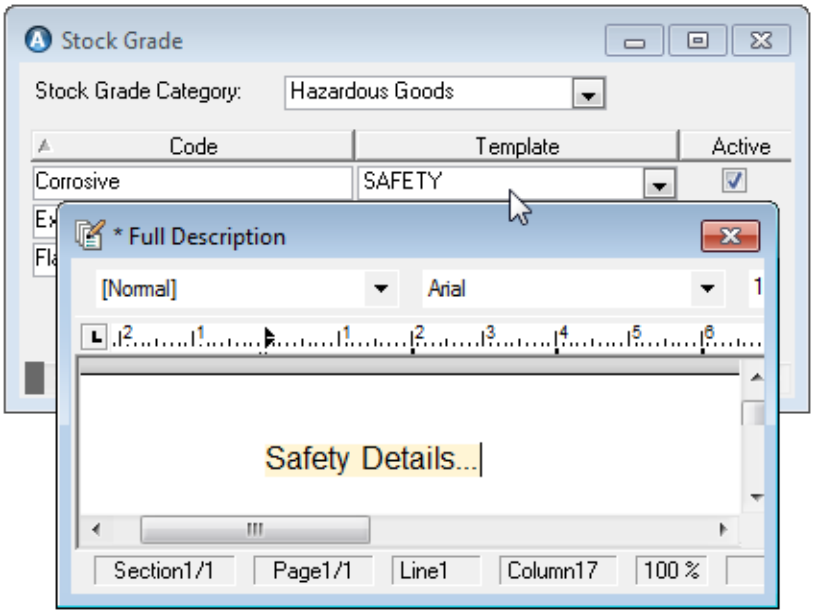
2. Add a stock grade name to the **Code** field.
3. To allow the grade to be applied to stock, flag the **Active** checkbox.
4. **Save** the register. Add as many codes to each category as needed.

Adding Extra Information to a Stock Grade

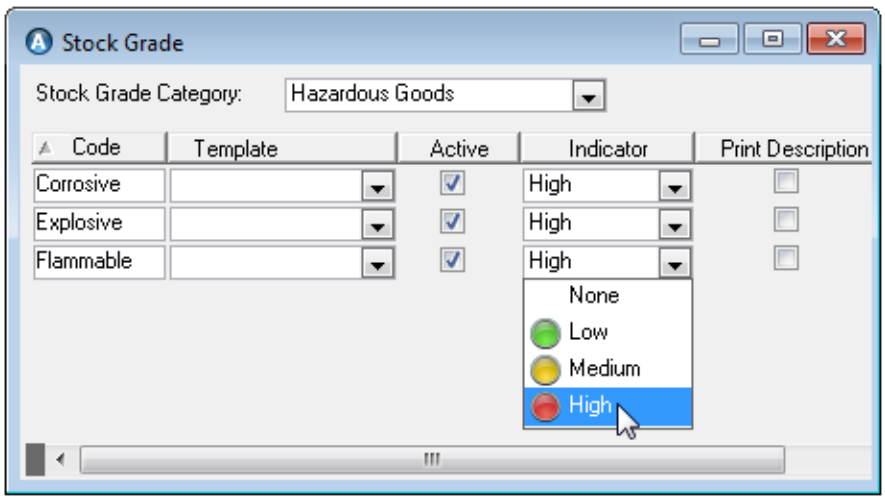
There are several ways to add extra information to stock grades:

[1]The Categories available in the drop-down window are defined in the window at Tools > Configuration > Stock Grade Categories.

- Select a grade and go to **Options > Details**. Fill out free-text information, or, select a **Template** for the Details window first:

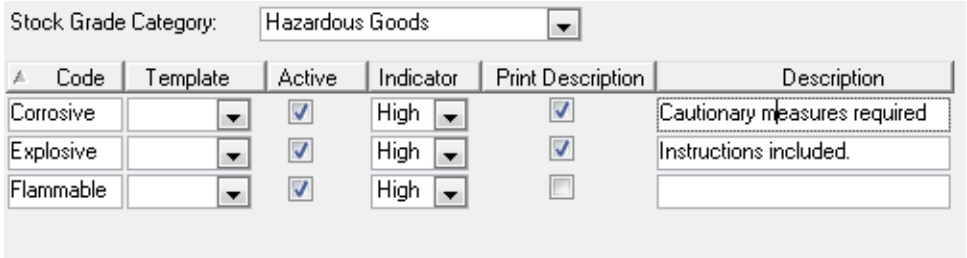


- Select an **Indicator** from the drop-down list:



When the grade is applied to stock, the icon will show up on relevant stock items in the purchasing process - on order forms, deliveries and transport documents. Forms, deliveries and transport documents can also be filtered by stock indicator level.

- Enter a free-text comment in the **Description** field and flag the **Print Description** box:



You can add this field to order form printouts, to show the description text on line items with the relevant stock grade applied. This lets you communicate extra details to the vendor.

Read about applying and using stock grades on stock and order forms in the *AMOS Business Suite M&P User Guide*.

3.7.14 Account Codes

File > Open Register > General > Accounting > Account Codes

This register is for storing the Account Code options available on purchase forms. The fields can be used according to your company purchasing and accounting strategies. The Account Code facility provides an alternate method of expense reporting to the budget system. To create the **Account Code Categories** available in the drop-down list see section 3.20.2.

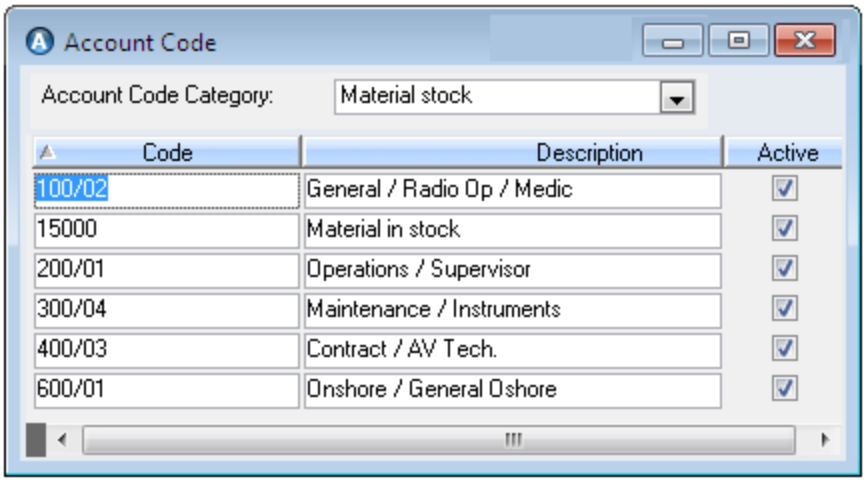


Figure 27 The Account Code Register

If you are using the Accounting module, this register is linked to Cost Centres and recorded in the Account Transactions window.

3.7.15 Audit Trail Reason

File > Open Register > General > Audit Trail Reason

When a user makes a change to a field on which an audit trail has been placed, depending on how the trail was configured the user might be prompted to supply a reason for the change. These reasons can be free-text, or pre-defined here in this register: for example, Inventory Control or Maintenance Adjustments.

Click the **New** button on the toolbar to create a new reason and add a **Code**, **Description** and add any explanatory **Notes**.

Flag the **Active** box to make the reason available for selection: otherwise it will not appear in the Audit Trail Configuration window or lookup lists.

3.7.16 World Regions

File > Open Register > General > World Regions

Use this register to input world regions into the system so you can be more specific when defining ports. World Regions are used in the Ports register.

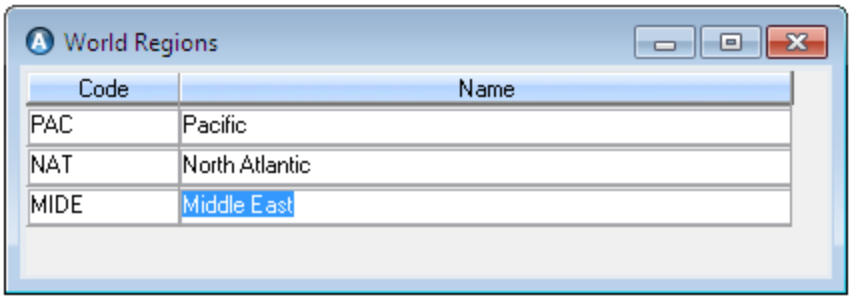


Figure 28 The World Regions register

3.7.17 Countries

File > Open Register > General > Countries

Use this register to input country **Names**, country **Codes** and **Country Regions** into the system.

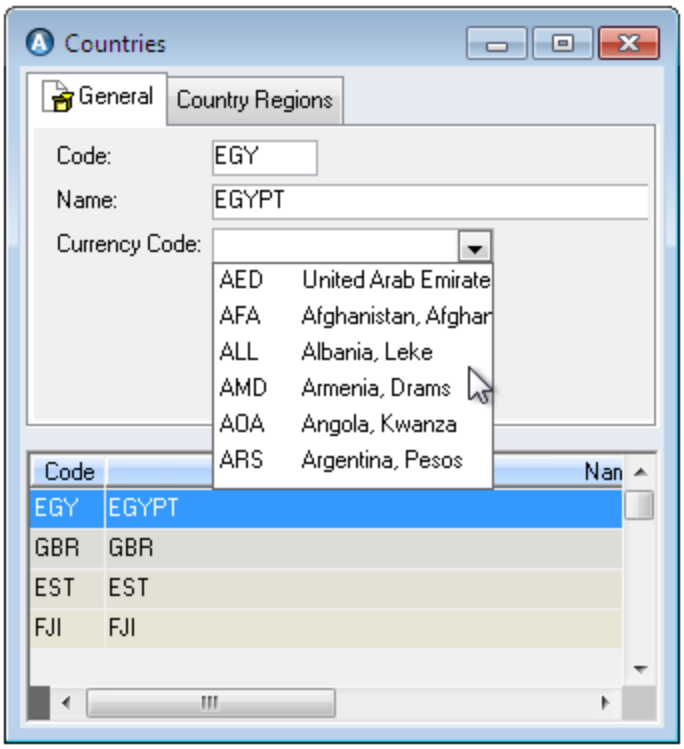


Figure 29 The Countries Register

The Country Regions tab enables you to divide a particular country into regions. For example, Norway may be sub-divided into Northern Norway and Southern Norway, the USA could be sub-divided into its states.

3.7.18 Ports

File > Open Register > General > Ports

This register is a list of the ports that your company vessels could visit.

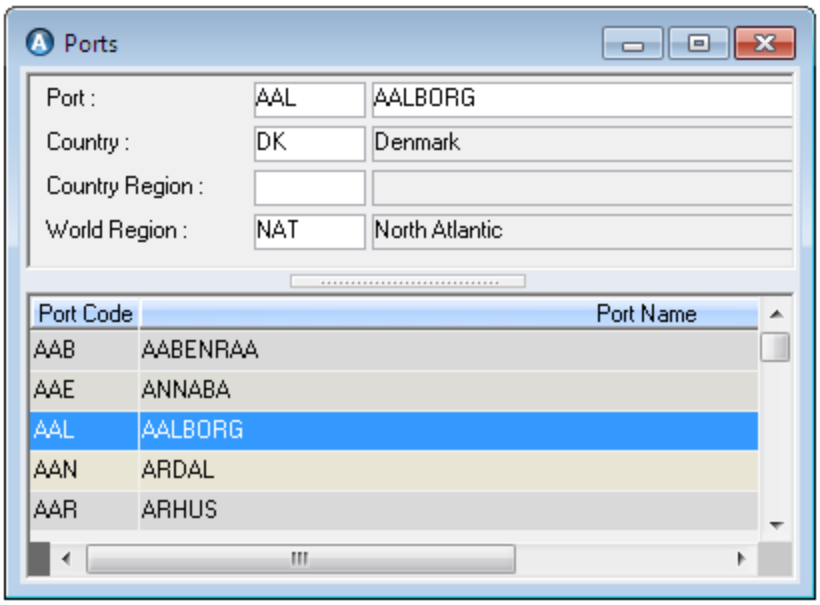


Figure 30 The Ports register

3.7.19 Berth Type

File > Open Register > General > Berth Type

Use this register to input the various types of berths to which your company's vessels may be moored. Berth types could include Offshore Buoy, Refuelling Pier, Container Wharf etc. The codes are used in the Berth Management register.

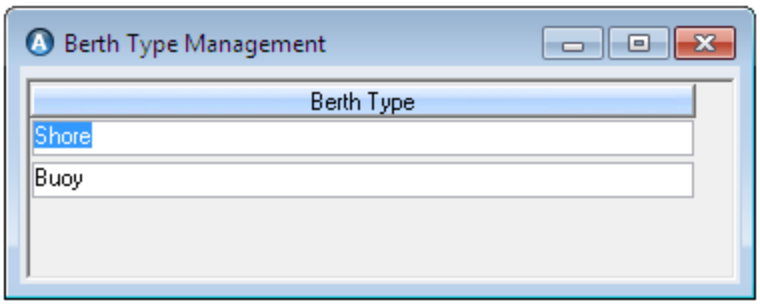


Figure 31 The Berth Types register

3.8 Maintenance Registers

AMOS M&P contains registers that allow you to differentiate between various aspects of maintenance tasks to be carried out.

The commands in the Maintenance menu are discussed in the *AMOS Business Suite - M&P User Guide*.

To open a maintenance register, go to **File > Open Register > Maintenance**:

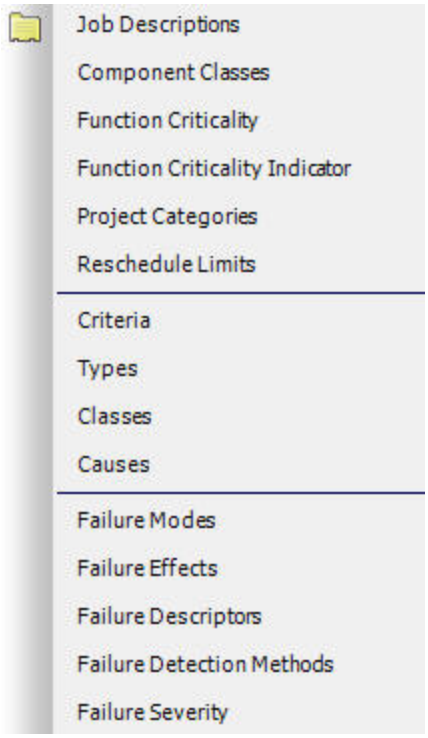


Figure 32 The Maintenance Sub-menu

3.8.1 Job Descriptions

File > Open Register > Maintenance > Job Descriptions

The Job Descriptions register stores the description for every job defined in the system.

When revision control is enabled[1], you can create and store multiple versions of each maintenance job description: the Job Descriptions window will also contain a tab called Revisions. You can create a **New** revision if the existing one is Active and **Delete** drafts. Click the **Compare** button to choose two revisions of the same job description to compare in a Word document.

The Used in Component Types and Used in Components tabs show all components/types where the selected job description is used.

Component jobs can be linked to any revision of a job description, until the work order is completed, and so the Used in Components tab will show the revision of the description linked to the job. Component type jobs are linked to the latest active revision of job descriptions.

3.8.1.1 Job Descriptions - Options

Details

The Description window is for a text description of the job. If a template is in use, you may be presented with a tailored layout containing fields and formatting.

Attachments

You can connect attachments to a job description, like scanned images from documentation/drawings or video films explaining maintenance details.

Select **View Attachment** to preview the attachment.

[1]Enable job description revision control by setting the system parameter 'Job Description Revision Control' to TRUE.

Permits to Work

Attach one or more work permits to the selected job description.

Permits to work are automatically attached to all new work orders based on the job description to which they are attached, and are issued and acknowledged in the work orders window.

Components

A job description may be connected to one or more defined components. From the component list, selecting **Options > Component Jobs** (or double-clicking on a component) opens the Component Jobs window and scrolls to the job for the combination of the selected job description and component. Jobs and job descriptions are connected to components in the Components window.

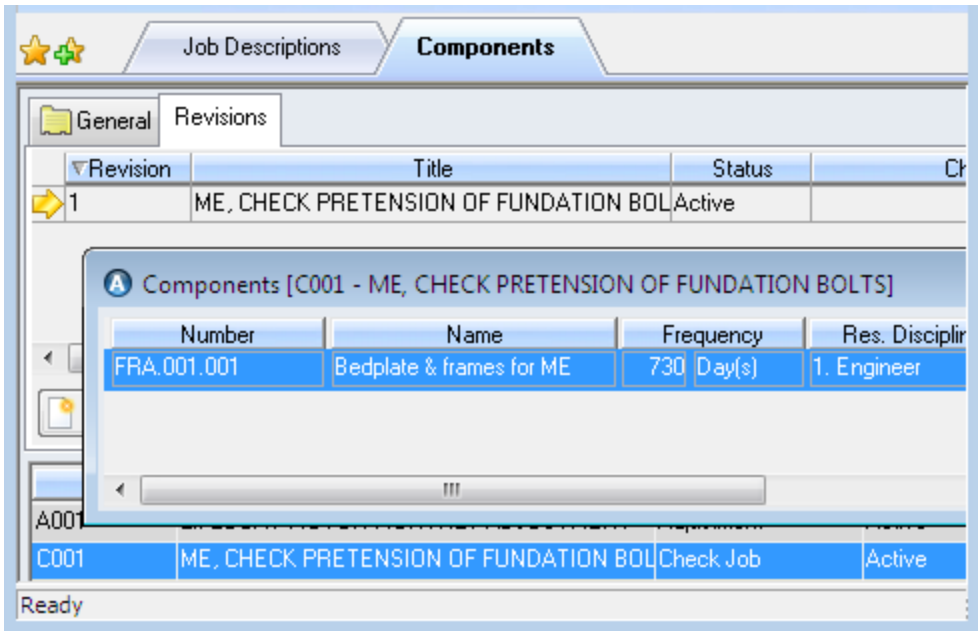


Figure 33 The Components Connected to a Job Description

Maintenance Log

When users report work, AMOS stores the information in the maintenance log.

When you select a line in the Maintenance Log window, the Options menu contains commands to view or register History, Stock Used, Resources Used and Counter Settings respectively.

Move Job References

AMOS allows you to replace all occurrences of a job description with another one. Selecting **Move Job References...** opens the window where all occurrences of the selected job description in the database are replaced by the job description you select from the next dialog.

This function can be protected by Group, at **Tools > Configuration > Access Control > Groups**, then selecting Access Control from the Options menu and selecting the Functions tab.

Create Component Type Job

Create a component type job for the currently selected job description. Select a component type, click **OK** to open the Jobs window and complete the remaining details.

Create Component Job

This function allows you to create a component job for the currently selected job description. Select a component, click **OK** to open the Jobs window and complete the remaining details.

Copy Job Description

Create a copy of the selected job description. You can only copy and make a new revision from an Active job description.

3.8.2 Component Classes

File > Open Register > Maintenance > Component Classes

The Component Classes register is for defining classes for components. Once component classes have been defined, the Components filter may be used to select components of the desired class.

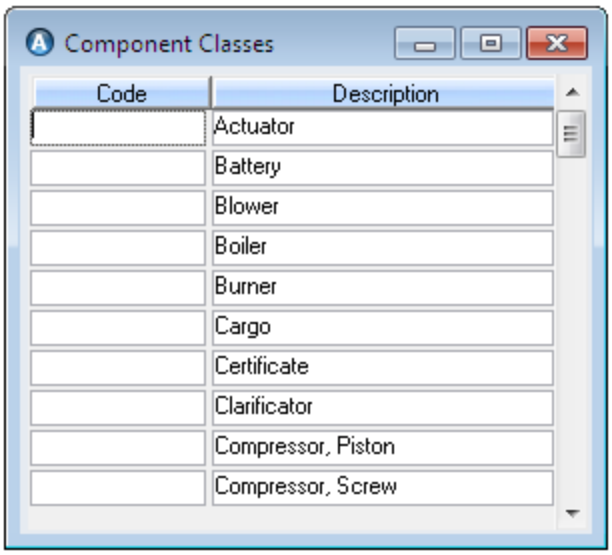


Figure 34 The Component Classes register

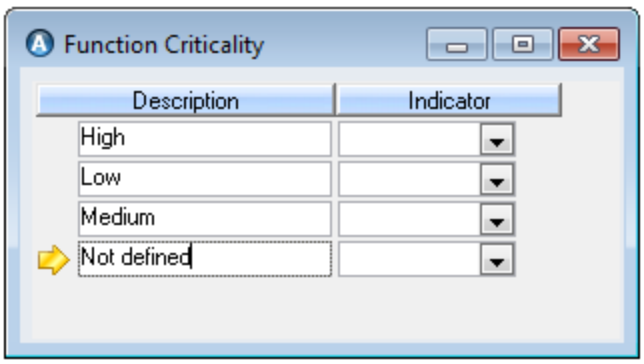
3.8.3 Function Criticality And Indicators

File > Open Register > Maintenance > Function Criticality/Function Criticality Indicator

The Function and Function Hierarchy windows contain a **Criticality** field for assigning degrees of criticality to any function.

The available criticality values are defined here:

1. Go to **File > Open Register > Maintenance > Function Criticality** and define the levels, for example: High, Low, Medium, etc:



2. **Save** the register.

To visibly differentiate between these function criticality levels, assign a graphical indicator to each one. The available indicators must first be defined in the Function Criticality Indicator register:

1. Go to **File > Open Register > Maintenance > Function Criticality Indicator**.
2. Click **New** to get a blank line. Then select an icon from the predefined options in the drop-down list. Its number and the corresponding image appear:

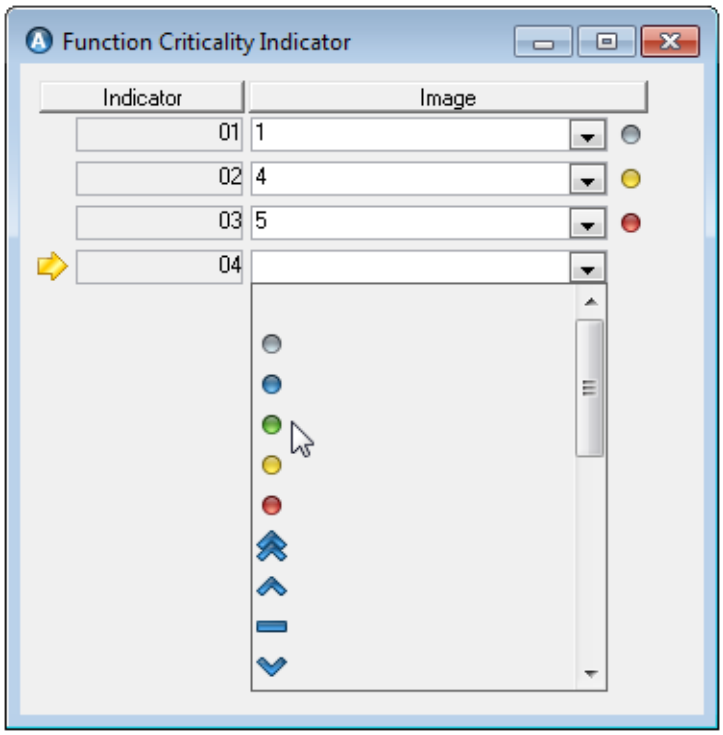


Figure 35 The Function Criticality Indicator register

No more than 15 indicators may be registered.

3. **Save** the indicators.
4. Return to the Function Criticality register: **File > Open Register > Maintenance > Function Criticality**.
5. Define an **Indicator** for each level by selecting an image and number from the drop-down list:

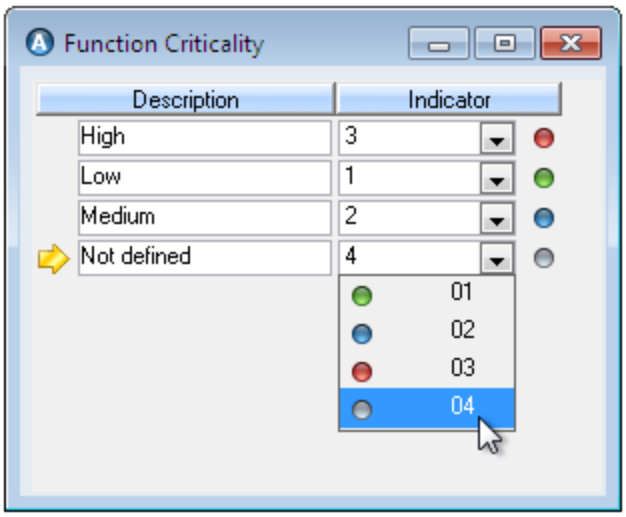


Figure 36 The Function Criticality register

When a criticality level is applied in the Function/Function Hierarchy window, the corresponding image will appear next to the selected function in the list/hierarchy.

3.8.4 Project Categories

File > Open Register > Maintenance > Project Categories

The Project Categories register is for defining the project categories available in connection with projects. The correct category can be selected when creating a new project, or added to an existing project's properties.

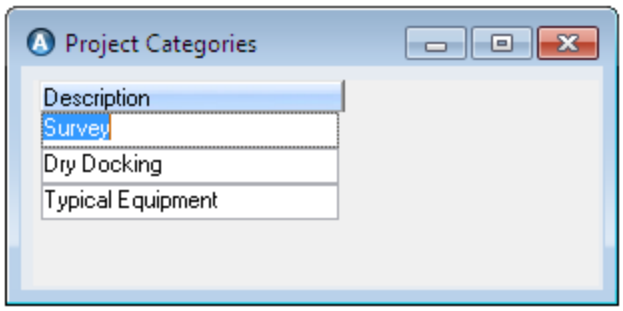


Figure 37 The Project Categories register

3.8.5 Reschedule Limits

File > Open Register > Maintenance > Reschedule Limits

The Reschedule Limits register is for defining the limits within which a selected Maintenance Task can be rescheduled. Each Reschedule Limit is a set amount of days before and after the calculated due date within which a Task can be carried out. For example, you can define a periodic frequency code Q with the name Quarter and define that this corresponds with a frequency of every three months. You can then define the number of days before and after the scheduled date that a Maintenance task based upon this periodic frequency can be rescheduled.

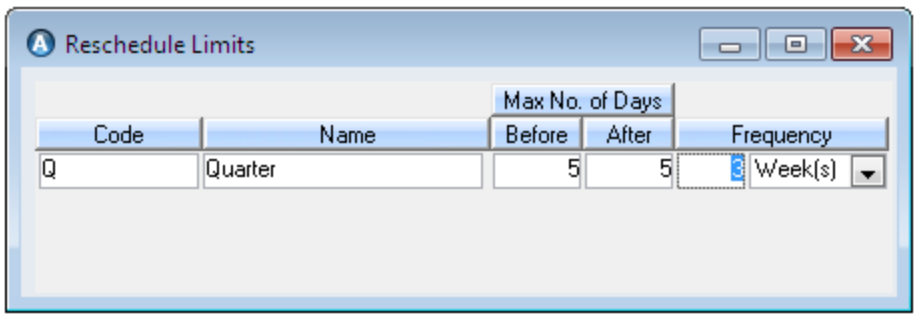


Figure 38 The Reschedule Limits register

3.8.6 (Maintenance) Criteria

File > Open Register > Maintenance > Criteria

Below is an example of maintenance criteria that may be entered in this register. The Advanced tab in the Work Orders filter may be used to select work orders that belong to a selected maintenance criterion.

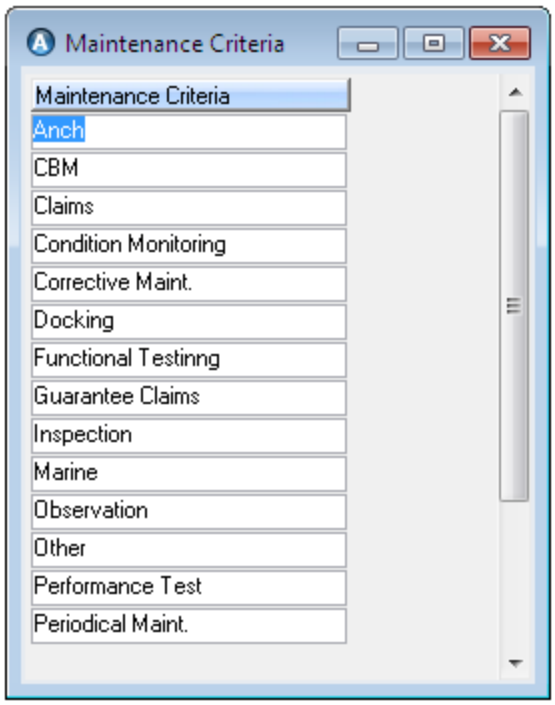


Figure 39 The Maintenance Criteria register

3.8.7 (Maintenance) Types

File > Open Register > Maintenance > Types

The illustration shows an example of maintenance types that may be defined in this register. The Advanced tab of the Work Orders filter may be used to select work orders that belong to a selected maintenance type. The **Budget Code** column is used to define the default budget code for each maintenance type.

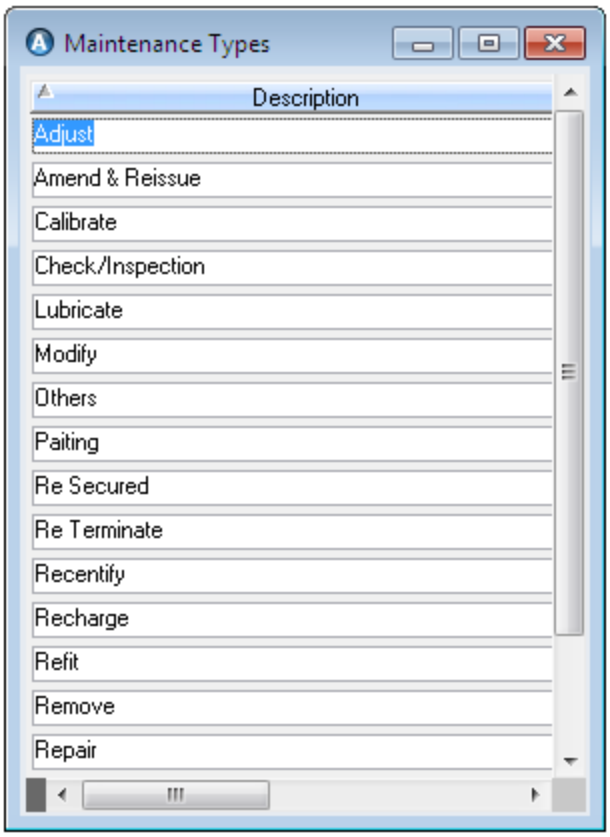


Figure 40 The Maintenance Types register

3.8.8 (Maintenance) Classes

File > Open Register > Maintenance > Classes

Below is an example of maintenance classes that may be defined in this register. The Advanced tab of the Work Orders filter may be used to select work orders that belong to a selected maintenance class.

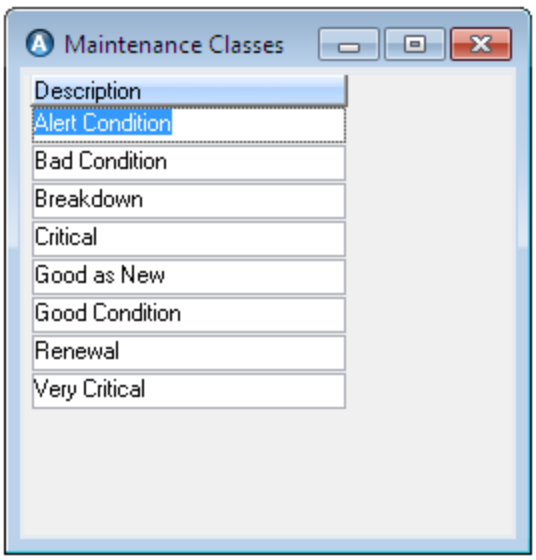


Figure 41 The Maintenance Classes register

3.8.9 (Maintenance) Causes

File > Open Register > Maintenance > Causes

This register resembles the other Maintenance registers described in the previous sections. The Advanced tab of the Work Orders filter may be used to filter according to a selected maintenance cause.

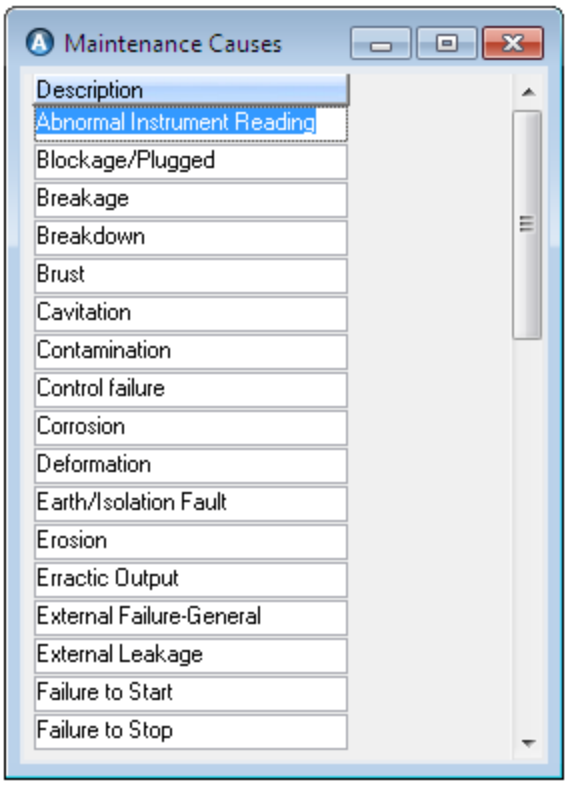


Figure 42 The Maintenance Causes register

3.8.10 Failure Modes

File > Open Register > Maintenance > Failure Modes

Use this register to create a list of things that can go wrong with a piece of equipment, and cause it to fail. For example, you could lists such things as: Failure to Stop, Overheating, Structural Deficiency, Deviation, etc. Once you have created the list, you can then link each one to the **Component Class** containing the type of equipment which would be affected by that type of failure. To do so, select a Failure Mode in your list. Then, go through the list of Component Classes in the bottom left of the screen, checking any classes to which the Failure Mode can apply. At the same time, you can select a list of causes to link to this Failure Mode, by checking the appropriate ones in the right hand side list called **Maintenance Cause**. Make sure to **Save** your setup.

Linking Failure Modes to Component Classes enables AMOS to present a narrowed list of modes in the filter to the user registering a Work Order or Requisition related to a failure, according to the Component he is recording the failure for. Linking Maintenance Causes allows users to assign a reason for the occurrence of the selected mode of failure.

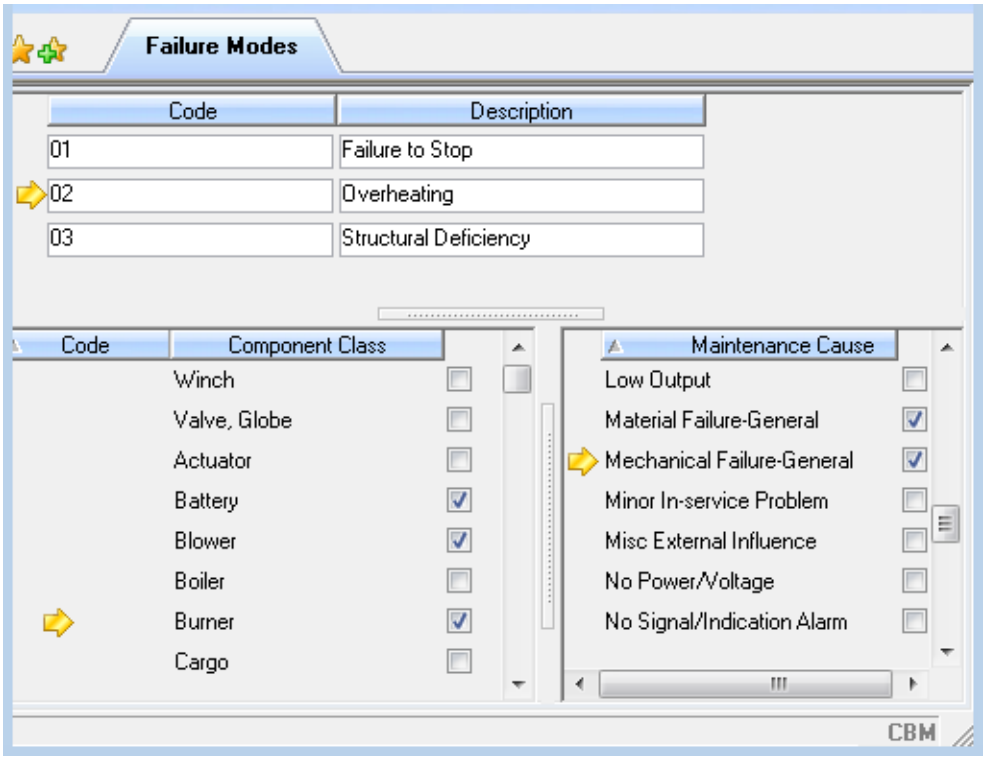


Figure 43 The Failure Modes register

3.8.11 Failure Effects

File > Open Register > Maintenance > Failure Effects

Use this register to maintain a list of Effects that a particular equipment failure could have on the vessel or voyage. For example, Delay in Voyage, Delay in Operations, Vessel Stoppage, etc.

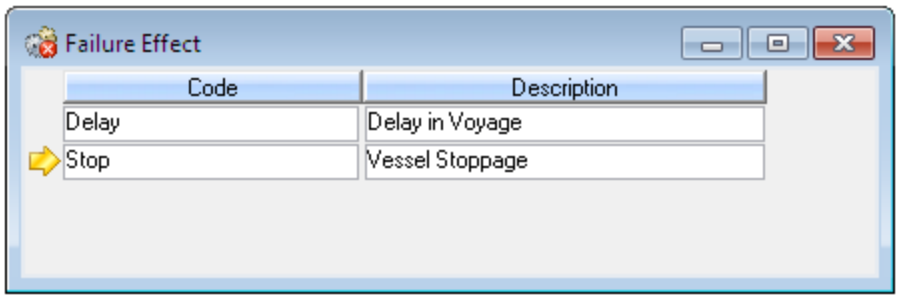


Figure 44 The Failure Effect register

3.8.12 Failure Descriptors

File > Open Register > Maintenance > Failure Descriptors

This register is for listing apparent and observed causes of equipment failures. The failure causes you enter here can later be registered against work orders and requisitions in case of equipment failures, and users can report on and analyse these failures as they occur.

3.8.13 Failure Detection Methods

File > Open Register > Maintenance > Failure Methods

For use with work orders and requisitions created as a result of equipment failure, create a list here of ways in which equipment failure is noticed. For example, by Observation, Testing, Continuous Condition Monitoring, Inspection, etc.

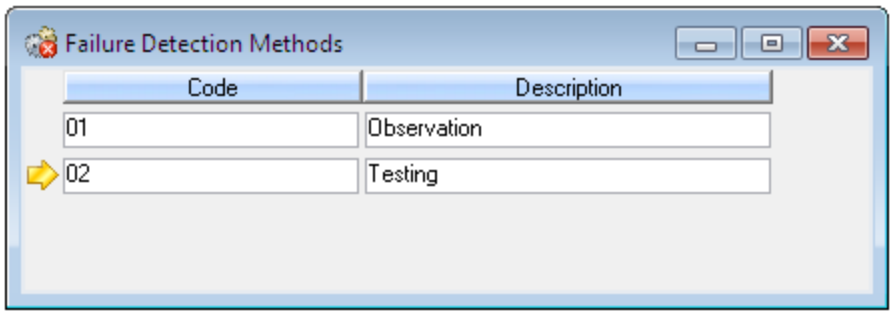


Figure 45 The Failure Detection Methods register

3.8.14 Failure Severity

File > Open Register > Maintenance > Failure Severity

Different modes of failure will have different effects on the piece of equipment they occur on. Depending on the failure, the equipment may or may not continue functioning. Use this register to create a list of Severity Values, for example Critical Failure, Non Critical Failure, etc.

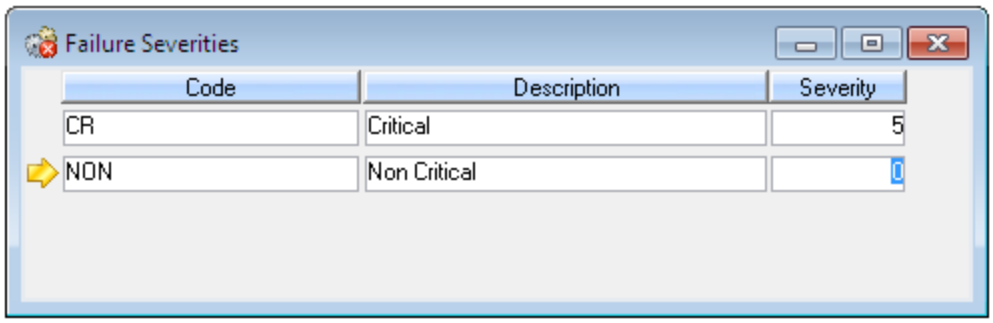


Figure 46 The Failure Severity register

3.9 Stock Registers

AMOS contains registers to differentiate between various aspects of stock handling.

The use of these registers and relevant commands in the Stock menu are discussed in the *AMOS Business Suite - M&P User Guide*.

To open a stock register, select **File > Open Register > Stock.**



Figure 47 The Stock sub-menu

3.9.1 Stock Classes

File > Open Register > Stock > Stock Classes

The Stock Classes register is for defining **Class Codes** and **Descriptions** to group stock types/items by. The **Receipt Tolerance** column allows you to set a maximum percentage of difference between stock quantities on goods received. If the goods received quantity falls outside of the permitted tolerance range compared to the order quantity, the items cannot be entered into stock.

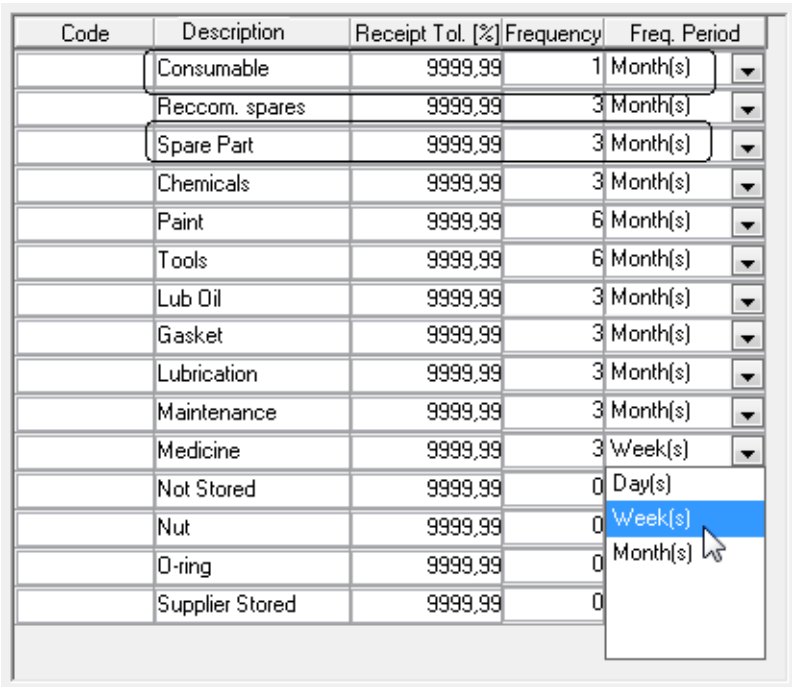
Stock Classes and Order Form Content

The system parameter 'Link Stock Class to Order Form Content' controls whether or not stock classes can be linked to Order Form Content descriptions such as Goods, Service Orders, Projects, etc. If the parameter is set to TRUE, an extra column appears in the Stock Classes register called Order Form Content and contains the values defined in the Order Form Content register. Only one content entry can be selected per stock class; however, multiple stock classes can be linked to the same content entry.

When the user defined field orderform.content is activated a drop-down list on the Forms window Additional Info tab lets users select a description for the content of a form.When a content description with stock classes linked to it is entered on a form, only the items belonging to the linked stock classes can be added as line items to that form. Furthermore, when forms are generated automatically the required items will be separated by content: that is, all items in all stock classes assigned here to the content entry 'Goods' will be grouped onto one form, etc.

Stock Classes and Best Purchase Price Periods

To help you establish the best possible purchase price and limit the records presented in the Purchase History window, you can apply a default time period to individual stock classes: for example the time frame you want to review would be longer on spare parts than on consumables like fuel oil. Set the period for each class[1] using the **Frequency** and **Freq. Period** columns:



[1] If your system contains stock without a class defined on it, you can set this same time period using a system parameter: Tools > Configuration > Parameters > Options > Purchase > 'Best Purchase Price Evaluation Period'.

3.9.2 The Price Classes Register

File > Open Register > Stock > Price Classes

The Price Classes register is for storing the various formulae that are applied to stock item values. Price Classes are used to add varying levels of administration or transport costs to an item or to reflect different international tax rates.

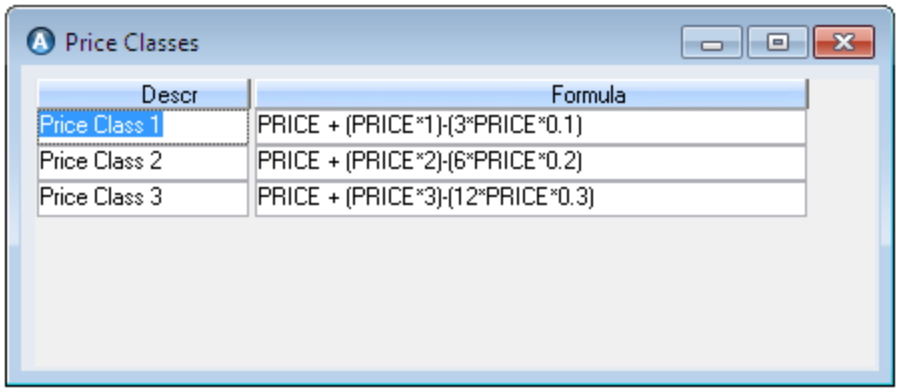


Figure 48 The Price Classes Register

Go to **Options > Try Formula** to check that the formula that you entered for each price class works correctly. A dialog box opens showing the result of applying the highlighted formula to a reference amount.

3.9.3 Transfer Reasons

File > Open Register > Stock > Transfer Reasons

The Transfer Reasons register is for defining the list of reasons that might be applied to a transfer document, found under **Stock > Transfer Documents**. This setting has no effect on any other entries in the database.

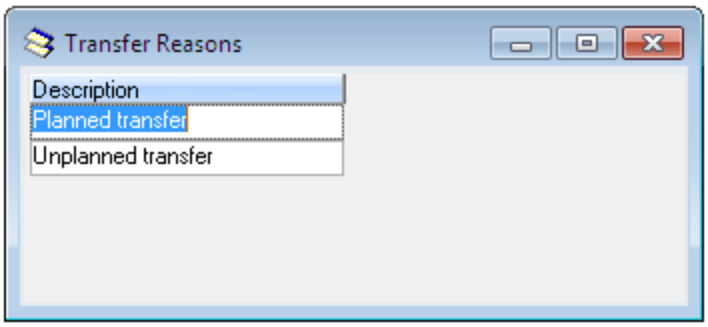


Figure 49 The Transfer Reasons register

3.10 Purchase Registers

AMOS contains registers that allow you to define certain aspects of purchase forms according to your own requirements. The information entered in these registers is then available in various purchase windows in the form of drop-down lists enabling the user to select the required item. When setting up these tables remember that they may be used for future e-Business functions. Whilst the information entered is generally defined by the individual organisation, where possible it is advisable to adopt an international standard for these tables such as the International Marine Purchasing Association (IMPA) codes.

To open a Purchase register, go to **File > Open Register > Purchase.**

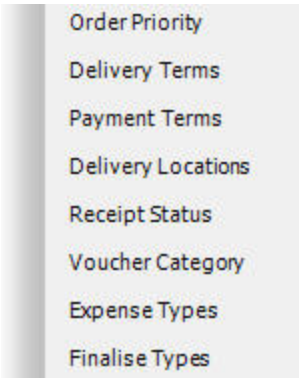


Figure 50 The Purchase sub-menu

3.10.1 The Order Priority Register

File > Open Register > Purchase > Order Priority

This register is for storing the Order Priority options available within purchase forms. The fields can be used according to individual company purchasing strategies for descriptive terms or a numbering system.

Flag the **Use in Deliveries** checkbox if you want to be able to set the same priority values on deliveries.

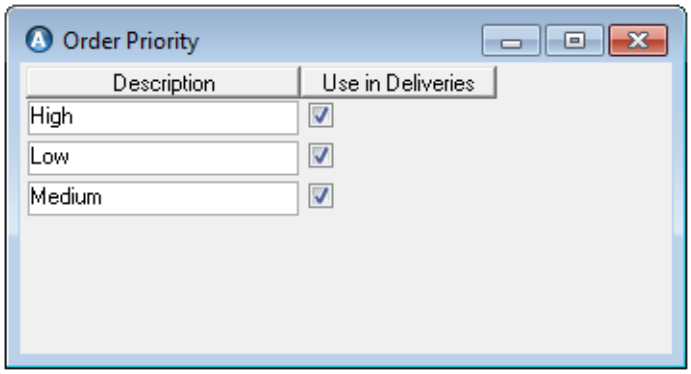


Figure 51 The Order Priority register

3.10.2 Delivery Terms

File > Open Register > Purchase > Delivery Terms

This register is for storing the Delivery Terms options available for purchase forms. The fields can be used according to individual company purchasing strategies for descriptive terms or a numbering system. It is recommended that you use internationally recognised codes with a view towards future e-business usage. There is also a details window accessed through the associated Options menu, for further explanation of each entry in the register.

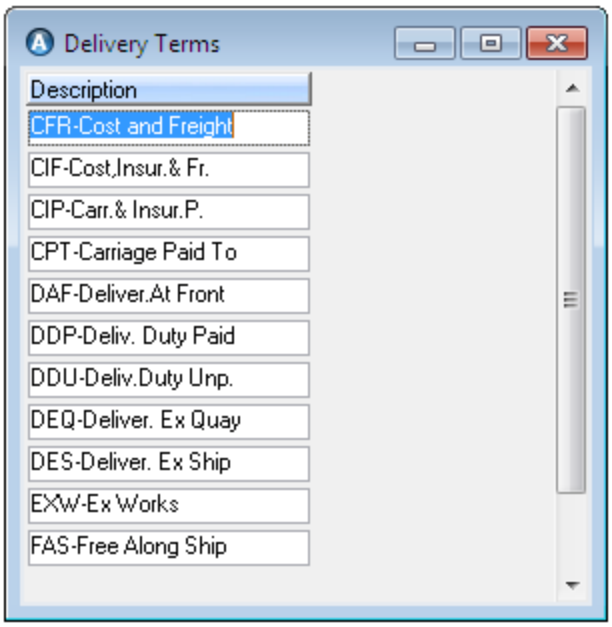


Figure 52 The Delivery Terms register

You can assign a Delivery Term to an address in the Address register. When a purchasing form is automatically generated for the vendor or that address is added as a vendor to an existing form, the delivery term on the address record is applied by default to the form.

3.10.3 Payment Terms

File > Open Register > Purchase > Payment Terms

This register contains the Payment Terms options available for purchase forms. The fields can be used according to individual company purchasing strategies for descriptive terms or a numbering system. It is recommended that you use internationally recognised codes with a view towards future e-business usage. There is also a details window, accessed through the associated Options menu, for further explanation of each entry in the register.

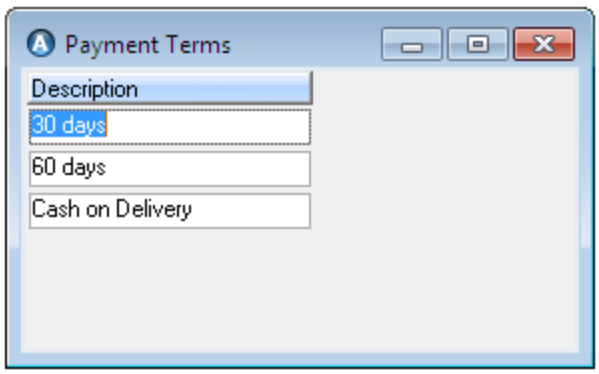


Figure 53 The Payment Terms register

You can assign a Payment Term to an address in the Address register. When a purchasing form is automatically generated for the vendor or that address is added as a vendor to an existing form, the payment term on the address record is applied by default to the form.

3.10.4 Delivery Locations

File > Open Register > Purchase > Delivery Locations

This register stores the possible Delivery Locations to be used within your organisation. The fields can be used according to individual company purchasing strategies for descriptive terms or a numbering system. It is recommended that you use international port codes with a view towards future e-business usage.

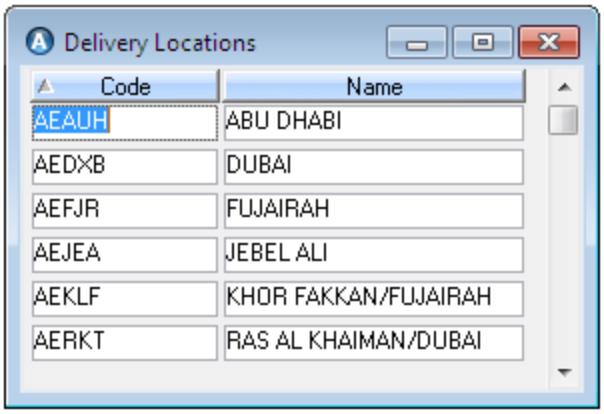


Figure 54 The Delivery Locations register

3.10.5 Receipt Status

File > Open Register > Purchase > Receipt Status

This register contains the options for receipt status available in purchase form line items.

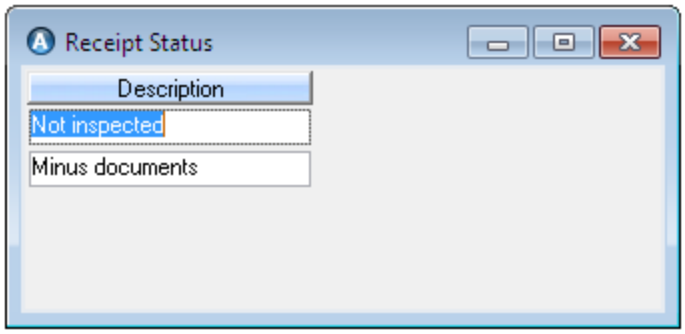


Figure 55 The Receipt Status register

3.10.6 Voucher Category

File > Open Register > Purchase > Voucher Category

This register is for defining category groups for vouchers, by code and name. Vouchers are attached to forms in the Vouchers window at **Purchase > Forms > Options > Vouchers.**

3.10.7 Expense Type

File > Open Register > Purchase > Expense Type

This register is available for use with the Custom Clearance module. It is for defining categories of expenses related to CC contracts, for example, Custom Fees, Transportation, Duty, Airport Storage, etc.

3.10.8 Finalise Type

File > Open Register > Purchase > Finalise Type

This register is available for use with the Custom Clearance module. It is for defining categories of finalisation for CC contracts, such as Consumed, or Asset.

3.10.9 Order Form Content

File > Open Register > Purchase > Order Form Content

When the user defined field orderform.content is activated and this register is populated, a drop-down list on the Forms window Additional Info tab lets users select a description for the content of the form - Service Orders, Goods, Projects, etc.

A system parameter[1] controls whether or not stock classes can be linked to these content descriptions. If set to TRUE and stock classes have been linked to content descriptions, then when new requisition forms are generated automatically the required items will be separated by content: that is, all items in stock classes belonging to the content entry 'Goods' will be grouped onto one form, etc. Furthermore, when a content description with stock classes linked to it is entered on a form, only the items belonging to the linked stock classes can be added as line items to that form.

Click the **New** button on the toolbar to enter a new content **Description**. Be sure to check the **Active** box to make the description available for selection.

To link stock classes to the Order Form Content entries set the parameter and go to **File > Open Register > Stock > Stock Classes.**

3.10.10 Order Form Origin

File > Open Register > Purchase > Order Form Origin

Use this register to create a list of departmental divisions to be set on Purchase forms: for example, 'Deck' or 'Engine' inside the Maintenance department. The values listed here can be selected from the Origin drop-down list on the Forms window General tab and indicate exactly where the form is originating from and required by. Access to the origin values is then assigned to Users or Groups, thereby giving those users access to any form specifying one of their assigned origins.

Default origins can also be created for Users or Groups. When the logged on user's ID is linked to a default order form origin, whenever a new form is created (automatically or manually) the linked origin will appear on the form automatically. If no default origin is assigned to the userID or to the group that user belongs to, no default will appear.

There is a system parameter[2] which can be set to display the Origin field on the Line Items window too. Line items will inherit the origin value from the form header.

Click **New** on the toolbar to enter a new **Code** and **Description** in the register. Make sure to check the **Active** box to make the origin value available for selection in the system.

3.10.11 Quotation Compare Item Code

File > Open Register > Purchase > Quotation Compare Item Code

When Quotation Compare Item Codes are available, users can apply them to item/vendor combinations in the Quotation Comparison Scenario window matrix. Applying an item code lets you do things like cancel an item in a certain scenario only, or prevent its price from

[1]Tools > Configuration > Parameters > Options > Purchase > Link Stock Class to Order Form Content
[2]Tools > Configuration > Parameters > Options > Purchase > Origin on Line Item Level

consideration in the total, without actually affecting the quotation itself.

To use item codes they need to be listed here and then activated in the Configuration tab on the Quotation Comparison Scenario window.

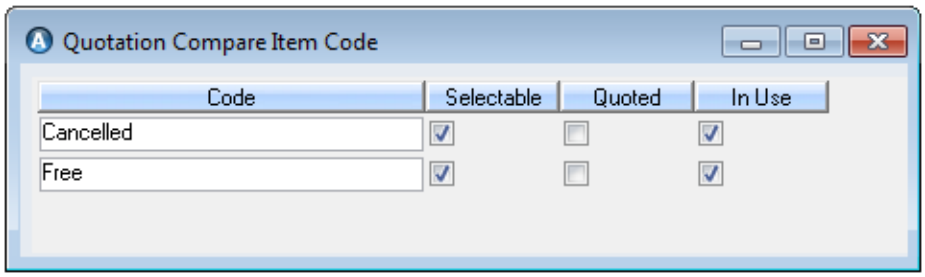
This adds a drop-down field containing the predefined item codes on each item/vendor intersection. Applying codes, saving and refreshing the window will re-configure the matrix, leaving out items and recalculating the prices for vendor/item accordingly.

To define codes, click **New** and then enter a **Code** name. Flag the **In Use** checkbox to make the code itself visible and available for use.

Then, consider the other two checkboxes:

- **Selectable**. When flagged, and the code is active and applied to an item in the matrix, that item is *available* for selection during the comparison. Unflagging it and then applying the code to an item *prevents* the item from being selected during comparison.
- **Quoted**. When flagged, the price as quoted will be used when this item code is applied. Unflagged, the price will not be considered for any item the code is applied to.

Either of the item codes shown in the illustration below can be applied to an item/vendor combination in the matrix to indicate that the item they are applied against should not be considered in the comparison total values for that vendor's quote, but can still be selected:



See the *AMOS Maintenance & Purchase User Guide* for more about quotations and quotation comparisons.

3.11 Attachment Registers

You can connect attachments like images and documents, etc., to records in AMOS Business Suite.

File > Open Register > Attachment > Sources - set up internal or external tools for displaying attachments.

File > Open Register > Attachment > References - build a library of available attachments.

To read more about working with attachments in AMOS Business Suite, see the Chapter 'Defining and Using Attachments' in the *User Guide* for M&P, Q&S or Personnel.

EXAMPLE: ATTACHMENT SOURCE AND REFERENCE DEFINITION

Following is a sample of an Attachment Source and a Reference defined for an external viewer using a DDE command:

On the Attachment Sources register, specify (for example):

Code - Excel

Name - Excel

Service Type - External

Service Name - EXCEL

Start Command - C:\Program Files\Microsoft Office\OFFICE11\EXCEL.EXE%IMAGE REFERENCE%

Display Command - [ALERT("Hello World")][ALERT("Hello Again")][APP.MINIMIZE()]

On the Attachment References register, specify (in this example):

Source - Excel

Code - xls

Name - xls

Reference - <an xls file>

When a user views the attachment, AMOS will:

1. Start Excel with the xls file.
2. Send a message call to Excel.
3. Send a message call to Excel again.
4. Send an instruction to minimise Excel.

3.11.1 Sources

File > Open Register > Attachment > Sources

Attachments need a defined source to be viewed. AMOS Business Suite offers an internal viewer; you can define other viewers and Windows programs on your PC as external viewers.

To define a source:

1. Go to **File > Open Registers > Attachment> Sources**.
2. Click **New** on the toolbar and enter a **Code** and **Name**.
3. Choose a **Service Type**[1]:

- **Internal**. The AMOS Internal Viewer opens standard graphic images like BMPs, JPGs, etc.
- **External**. Opens files created by any type of program like Word, Excel, Adobe Acrobat, etc.
- **Internal Web**.Opens Intranet sites, as well as external web sites from within AMOS itself.
- **External Web**. Open Internet sites in your default web browser.
- **Default Association**. Allows for dragging and dropping files of any type onto the Attachments tab in any window. Also allows for importing image files from connected devices like a mobile phone or a scanner.

[1]The availability of source tools depends on your system license.

- **AMOS Titanium**.

4. Selecting 'External' service type requires a **Start Command** which points to the external program which will open the attachment file:

   <path>\<executable file name> %IMAGE REFERENCE%

   %IMAGE REFERENCE% tells the tool to display the attachment reference as supplied by AMOS.

   If you know the names and syntax of DDE commands supported by the tool, you can enter one in the **Display Command** field.

5. **Save** the source tool.

> **TIP**
>
> See section 3.11 for a sample of an Attachment Source and Reference definition using a DDE command for an external viewer.

Graphics Directory

To correctly display attachments, AMOS needs to know where the files are stored. The storage location is called the Graphics Directory and you can see or define it at **Tools > Configuration > Parameters > Directories >** 'Graphics Directory'.

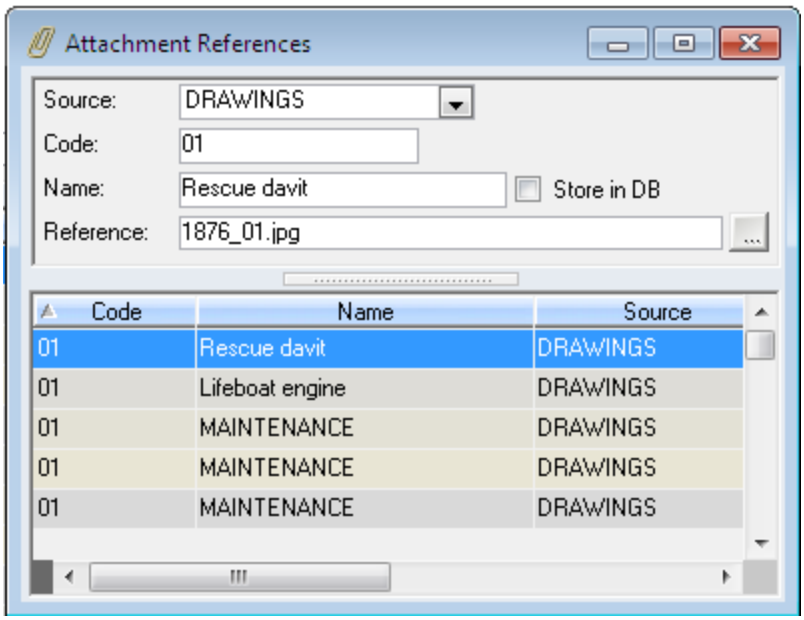
Attachments can be stored by default in the graphics directory, or stored externally outside of AMOS:

- If you leave the **Graphics Directory** field on an attachment source entry blank, attachments opened from that source will be retrieved from the parameter-defined graphics directory.
- To store attachments in another directory, define an alternate location on the source entry: use the **Graphics Directory** lookup to browse to a folder in your system.

3.11.2 References

File > Open Register > Attachment > References

After defining attachment sources, you can begin building a library of references to attachment files for use in AMOS Business Suite. Attachment references can be linked in turn to records in AMOS.



To add an attachment reference:

1. Go to **File > Open Register > Attachment > References**.
2. Click **New**.
3. Give the reference a **Code** and a **Name**.
4. Select the attachment **Source** - the tool defined to look up an attachment of this type.
5. Lookup the **Reference** - the path to the attachment file itself. Or go to **Options > Select File...** to locate it.
6. **Save** the reference. To open up and see the file, go to **Options > View Attachment**.

TIP

See section 3.11 for a sample of an Attachment Source and Reference definition using a DDE command for an external viewer.

Storing Attachments in the Database

If you save a reference to a file in a folder that is only available to you, no one else will be able to open the file unless it is stored in the database or copied to a shared Graphics Directory that is available to all users.

To store an attachment in the database for replication purposes flag the **Store in DB** checkbox on the reference. When an attachment is not stored in the database and a user adds it to a record, AMOS will refer to the setting of the parameter 'Attachment File Stamp'[1] to determine if the date and time on the file should be left as is, or updated to match the date and time found on the database server.

NOTE: When an attachment is stored in the database the original file reference is also stored, enabling the user to remove the file at a later date. If the original file is found the attachment is removed from the database. If the original file is not found a warning is displayed. If the user proceeds with the removal after the warning message the attachment file is deleted.

If the attachment is not already stored in the graphics directory, AMOS handles it according to the setting of the system parameter 'Attachments File Operation':

[1]Tools > Configuration > Parameters > Options > General > Attachments > 'Attachment File Stamp'

Set to WARN the user will be notified that the file is not in the installation's Graphics folder and prevented from attaching it until he/she has added it to the Graphics folder. Set to COPY, the attachment file will be copied automatically to the Graphics folder without a user message. Set to MOVE, the file will be moved to the Graphics folder without a message to the user. Set to ASK, a dialog appears and the user can decide whether to Leave the file where it is, Copy it to the Graphics folder, or Move it there.

3.12 Quality Procedures Registers

The registers for use with AMOS Q&S functions are accessed at **File > Open Register > Quality Procedures.**

See the *AMOS Business Suite - Quality and Safety User Guide* for more information about the Quality windows and functionality.

3.12.1 Categories

File > Open Register > Quality Procedures > Categories

Procedures belong to different procedure categories. Before you create a new procedure, determine whether you need to create a new procedure category.

3.12.2 Job Descriptions

File > Open Register > Quality Procedures > Job Descriptions

Use this register to enter Quality job description details. Go to the Versions tab to enter the version number and title of the job description. The job descriptions can then be assigned to procedure jobs in the General tab of the Procedure Jobs window.

Select **Options > Details** to open the Description editor window. This is a free text window, depending on the type of editor selected. The job description details will be shown in the Work Orders job description according to which procedure is linked to that job description.

Newly inserted attachments can be moved and resized. Click the attachment to select it, then press **ALT** to move or size the attachment. All attachments are inserted by default at the top of the page, and must be moved to the desired position.

3.12.3 Document Templates

File > Open Register > Quality Procedures > Document Templates

Use this register to define Codes and Titles for document templates.

Having entered a **Code** and **Title** for a template, select **Options > Template** to open the Document Templates window and create a template associated with the new template title.

3.13 The Non Conformity Registers

Select **File > Open Register > Non Conformity** to register details for Type, Category (main and sub), Severity and Cause of non-conformities. The values entered in the register windows are displayed in various drop-down lists used when Non-Conformity situations are reported.

3.13.1 Non Conformity Types

File > Open Register > Non Conformity > Type

This register is for defining types of non-conformity and their corresponding codes. You can edit existing field information, or click **New** to add a new row and enter a suitable code and name. To delete a row, select the row and click the **Delete** button. On completion, **Save** the changes.

3.13.2 Non Conformity Category

File > Open Register > Non Conformity > Category

There are two category levels of non-conformity occurrences, Main and Sub. Each main category can contain a number of sub-categories. To define a new main or sub-category, select **File > Open Register > Non Conformity > Category** and choose **Main** or **Sub**.

When you select a main category in the upper list, the Sub-Category list displays the sub-categories already defined.

The right side of the window allows you to add sub-categories, grouped by a main category.

NOTE: If your organisation has a limited number of vessels, it is important not to define too many different categories. If you do, it will be difficult to use AMOS Q&S to produce significant statistical data during analysis.

3.13.3 Non Conformity Severity

File > Open Register > Non Conformity > Severity

Use the Severity register to define suitable descriptions for the levels of severity, with pre-defined levels from 5 (the lowest level) to 1 (the highest level).

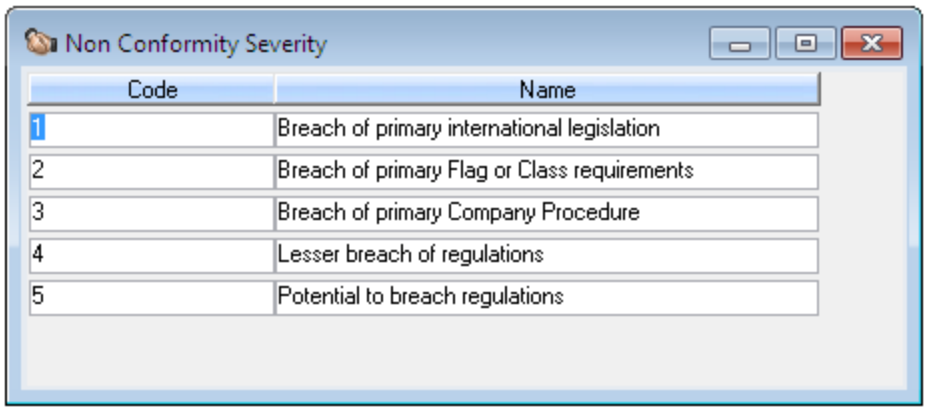


Figure 56 The Severity register

3.13.4 Non Conformity Cause

File > Open Register > Non Conformity > Cause

The Cause register is for defining a set of causes and corresponding codes for non-conformity occurrences. You add and delete causes the same way you work with the Non Conformity Severity register, as described in the previous section.

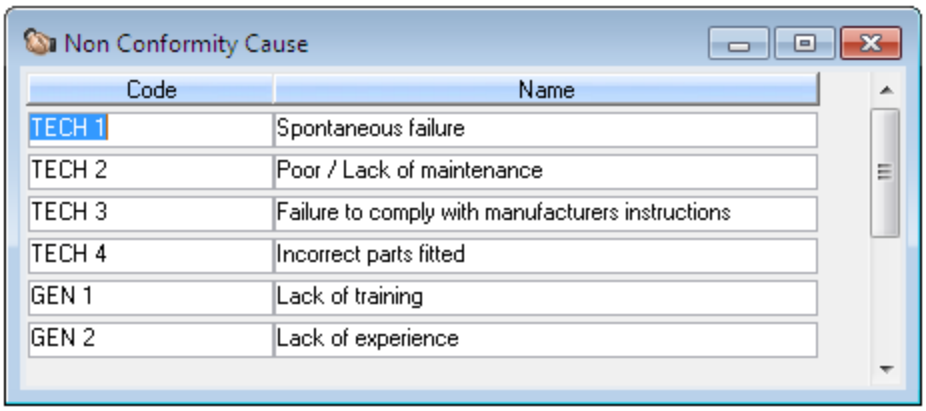


Figure 57 The Cause register

3.14 Emergency Response System Register

Select **File > Open Register > Emergency Response System > Contact Types** to add contact types. These contacts are available for use within the ERS module. The contact types are divided into three groups:

- External
- Internal
- Vessel Specific

3.15 Claims - Insurance Category

Select **File > Open Register > Claims > Insurance Category** to enter the register for defining Insurance Categories. These categories are then available for use with the Insurance window (Quality > Insurance).

3.16 Voyage Management Registers

The Voyage Management registers are contained at **File > Open Register > Voyage Management.**

3.16.1 Cargo Group

File > Open Register > Voyage Managment > Cargo Group

Simplify registration and organisation by allocating cargoes to groups. For example, place cargoes of sand, gravel and stone in a group called 'Dry Bulk', and all types of crude oil cargoes in a group called 'Crude Oil'. The Cargo Group register lists your company's cargo groups. This information is used in the Cargo Type Management and the Events registers.

3.16.2 Cargo Type

File > Open Register > Voyage Managment > Cargo Type

This register is a list of the types of cargo that your company's vessels carry. Each cargo type is allocated to a cargo group. The Cargo Type list is used in the Cargo Filter and the Cargoes window.

3.16.3 Cargo Attribute Type

File > Open Register > Voyage Managment > Cargo Attribute Type

Specific types of cargoes have their own attributes. For example a certain type of crude oil has a defined specific gravity, a fuel oil has a flash point etc. This register lists the attribute types, and allocates cargo types and value types to the attributes. When a cargo group is specified on the Cargo Details form, the appropriate attributes as defined here are automatically added to the Attributes tab. You must then enter the required values for those attributes and save the data.

3.16.4 Delay Activity

File > Open Register > Voyage Managment > Delay Activity

This register defines the activities that could occur during a delay in a voyage. The activities are contained in a drop-down list in the Delay tab in the Voyages window.

3.16.5 Delay Reason

File > Open Register > Voyage Managment > Delay Reason

This register defines the reasons for delaying a voyage. The reasons are contained in a drop-down list in the Delay tab in the Voyages window.

3.16.6 Event Type

File > Open Register > Voyage Management > Event Type

A loading or discharging operation is effectively a series of events. These events can include, for example: first line ashore, first hose connected, first hatch open, last hatch closed etc. Some events are mandatory for a particular cargo type, and some are voluntary. The mandatory events can be programmed to appear in the window automatically in the correct order when a loading or discharging operation is created. The user then inputs the dates and times when these events occur and saves the data.

All the possible events are pre-defined in the **Event Type Management** register. Mandatory events for a particular load type are defined by making the Load or Discharge sequence anything other than 0.

The event types are used in the Voyages window Event tab and Port Calls tab and the Cargoes window Event tab.

3.17 Personnel Registers

The Personnel registers store information about the crew members, and other data relevant to crew administration. Selecting **File > Open Register > Personnel** opens the Personnel registers list in a new window. The registers are contained in a hierarchy: click the + signs to expand the folders individual registers are grouped into.

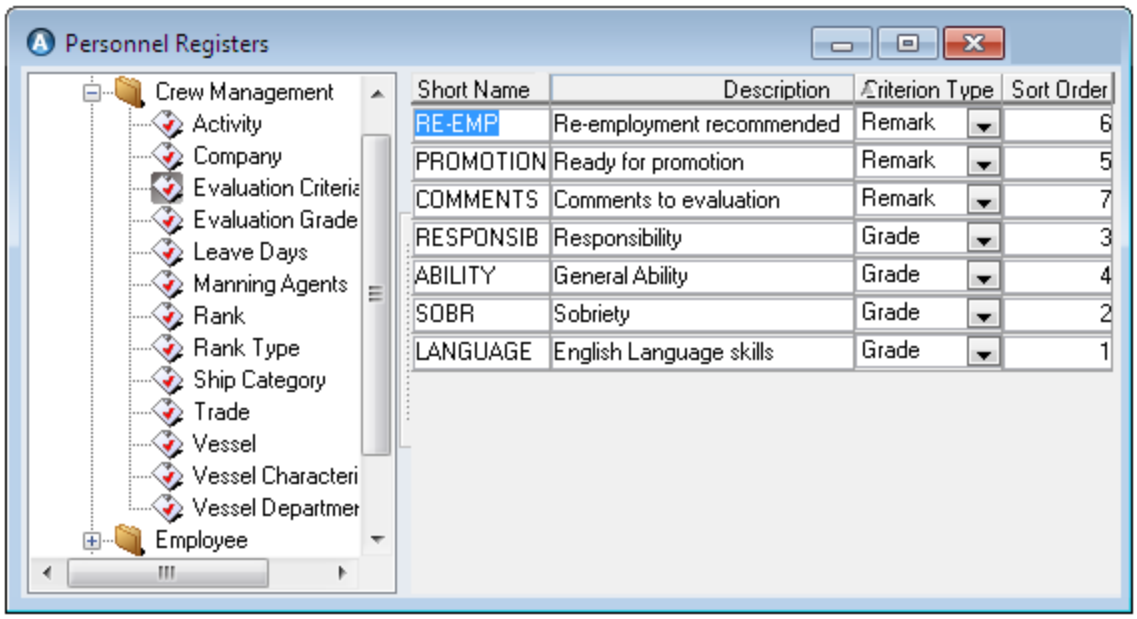


Figure 58 The Personnel registers

3.17.1 Activity

File > Open Register > Personnel > Crew Management

This register lists the various employee activities. These activities can include Active on board, Inactive on leave, Training, Sick leave etc. The activities are used in the Employee Overview window Service tab.

- Check the **Onboard** box if the employee will be onboard the vessel while engaged in this activity.
- Select the type of **Leave Days** that are to be counted (earning, deducting, neutral etc.).
- Click in the **Bar Type** field and select the bar colour to be used when presenting the information in the Planning windows.

3.17.2 Company

File > Open Register > Personnel > Crew Management

This register contains the names of the company, ship owners, ship managers and other companies the employee may work for or that may own or run the vessels.

3.17.3 Evaluation Criteria

File > Open Register > Personnel > Crew Management

This register lists the various criteria for performing employee evaluations. The criteria are used in the Employee Overview window Service tab under the Evaluation button. Use the **Sort Order** field to indicate the position in the list for each entry.

3.17.4 Evaluation Grade

File > Open Register > Personnel > Crew Management

This register defines the various grades used in employee evaluations. The grades are used in the Employee Overview window Service tab under the Evaluation button. Use the **Order** field to indicate the grade's sequence in the list.

3.17.5 Leave Days

File > Open Register > Personnel > Crew Management

Use this register in combination with the Sailing Period (see section 3.17.21) and the Contract Leave Days (see section 3.17.15) registers to define the number of days off an employee earns per working day. First define the leave days types in this register, then go to the Contract Leave Days register and define the codes, then go to the Sailing Period register and define the sailing periods. Use the **Signature** field to indicate if leave days should be deducted from the employee's total (-), or if the leave days should be added (+), or if there is no change (Neutral).

The values defined here apply to the entire workforce. Under normal circumstances a set of values are defined when the application is first installed in the company, and it is very unlikely that these will ever be edited.

3.17.6 Manning Agents

File > Open Register > Personnel > Crew Management

This register lists the names and addresses of the agents used to provide crew members to the vessel. The manning agent information is linked into the Employee Overview window in the Contract tab.

3.17.7 Rank

File > Open Register > Personnel > Crew Management

This register lists the various ranks your company uses. The ranks are used in two places in AMOS Personnel; in the Employee Overview window General tab and in the Employee Overview window Contract tab.

3.17.8 Rank Type

File > Open Register > Personnel > Crew Management

This register defines the various types of rank the employees may hold. The rank types are used in the Rank register. See section 3.17.7 for more information.

3.17.9 Ship Category

File > Open Register > Personnel > Crew Management

This register lists the types of ships your company owns. These types can include for example RoRo Ferry, Oil tanker, Dry bulk carrier etc. The data is used in the Vessel register.

See section 3.17.11 for more information.

3.17.10 Trade

File > Open Register > Personnel > Crew Management

This register lists the trade areas (i.e. continents, seas, etc) frequented by your company vessels. The data is used in the Vessel register.

See section 3.17.11 for more information.

3.17.11 Vessel

File > Open Register > Personnel > Crew Management

Input the details of the company vessels into this register. If the AMOS Business Suite with Personnel is to be used onboard the company's vessels as well as in the office, then it is recommended that each vessel's details are added to the database while you are in the installation department for that vessel. For example, if the vessel's name is AMOS Explorer, you should switch installation to 'AMOS Explorer' and register the details there.

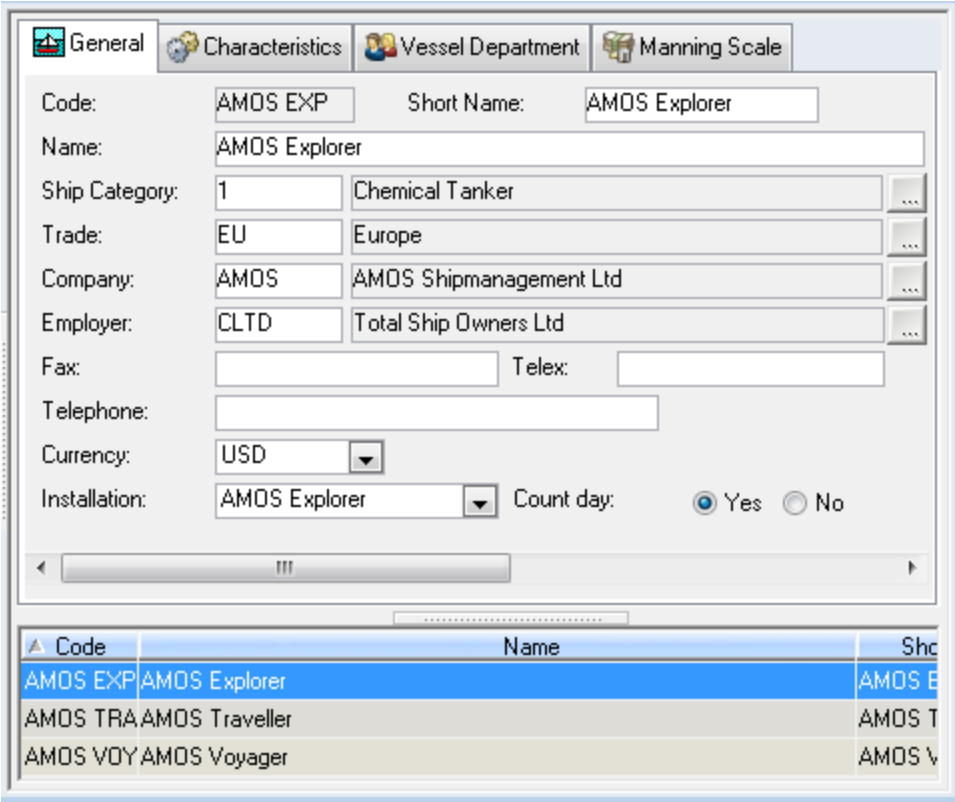


Figure 59 The Vessel register

Use the General tab to enter each vessel's basic information. Service in some vessels or installations, for example the head office, may not earn days off for the employee. Select the appropriate radio button beside **Count Day** in the General tab, to tell the application whether service in the selected vessel/installation is to be included in the days-off calculation. This information is also included in some reports.

Characteristics Tab

Input vessel characteristics into this register: Nationality, Dimensions, Call Sign etc. Characteristics available to choose from are contained in the Vessel Characteristic Type register.

Vessel Department Tab

Your company can divide a vessel into departments to simplify the organisation. Input the departments applicable to the vessels into this register.

NOTE: To delete a department select it and click the **Delete** button in the window. Do not click the Delete button in the toolbar or select Delete from the right-click menu as these actions delete the vessel from the register, not the department from the vessel.

Vessel Register Manning Scale Tab

Each vessel has a defined manning scale - the number and specialisations of the crew members required to run the vessel. In this tab you define the manning scale for the vessel and state the license requirements for each position. Once the manning scale and corresponding licence

details are entered, you are able to keep track of the manning and license status via the Planning facility.

Each position on the vessel has a normal Operational manning requirement (the number of personnel normally employed in that position), and a Minimum requirement (the legally justifiable minimum required to run the vessel safely).

Use the License Profiles table to define the licenses and certificates that must be held by the employees to be selected for the various positions on the vessel.

3.17.12 Vessel Characteristic Type

File > Open Register > Personnel > Crew Management

This register defines the various Vessel Characteristic Types used when registering the company vessels into AMOS Personnel. The characteristics are used in the Vessel register Characteristics tab.

See section 3.17.11 for more information.

3.17.13 Vessel Department

File > Open Register > Personnel > Crew Management

Your company can divide a vessel into departments to simplify the organisation. Input the company departments into this register. The departments registered here are used in the Vessel register Vessel Department tab.

See section 3.17.11 for more information on that tab.

3.17.14 Category

File > Open Register > Personnel > Employee

This register defines the codes and descriptions of the various categories of personnel within your organisation.

3.17.15 Contract Leave Days

File > Open Register > Personnel > Employee

This register defines the codes your company uses in employees' contracts to represent the number of leave days earned per working day. The data is used in the Employee Overview window Contract tab, and for calculating leave due.

3.17.16 Disability Grade

File > Open Register > Personnel > Employee

This register is a list of the various grades of disability that employees may suffer while sick. The data is used in the Employee Overview window Medical Info tab.

3.17.17 Employee Address Type

File > Open Register > Personnel > Employee

This register lists the possible address types that an employee can use. Examples include primary, secondary, temporary etc. The data is used in the Employee Overview window General tab.

3.17.18 Family Relation

File > Open Register > Personnel > Employee

This register lists the types of family relations that employees may register as next-of-kin. Examples include wife, father, brother etc. The data is used in the Employee Overview window Family tab.

3.17.19 Institute

File > Open Register > Personnel > Employee

This register defines the various educational institutes and schools that employees have attended to gain qualifications. The data is used in the Employee Overview window Educ/Lic tab.

3.17.20 Marital Status

File > Open Register > Personnel > Employee

This register is a list of the possible marital statuses that company employees may have. The data is used in the Employee Overview window General tab.

3.17.21 Sailing Period

File > Open Register > Personnel > Employee

Use this register in combination with the Leave Days and the Contract Leave Days registers to define the number of days off employees earn per working day. Go first to the Leave Days register and define the leave day types, then go to the Contract Leave Days register and define the contract codes, then come to this register and define the sailing periods.

To define days on and days off:

1. Click the **New** button in the toolbar.
2. The codes and descriptions defined in the Contract Leave Days register appear in a list.
3. Select the appropriate code and description, then click **OK**. A new line is added to the description list in the register and the selected code and description are added to the fields. Note that you can only use each defined code once in a Sailing Period register.
4. Enter the number of days the employee must work to earn days off, in the **Days On** field.
5. Enter the number of days off the employee earns by working the number of days defined in the Days On field, in the **Days Off** field.
6. **Save** the changes.

See section 3.17.5

3.17.22 Sickness

File > Open Register > Personnel > Employee

This register is a list of the various illnesses that employees may contract. The data is used in the Employee Overview window Medical Info tab.

3.17.23 Sickness Nature

File > Open Register > Personnel > Employee

This register is a list of the possible natures of the various illnesses that employees may contract. The data is used in the Sickness register and is displayed in the Employee Overview window Medical Info tab.

3.17.24 Sickness Type

File > Open Register > Personnel > Employee

This register is a list of the various illnesses that employees may contract. The data is used in the Sickness register and is displayed in the Employee Overview window Medical Info tab.

3.17.25 Standard Document

File > Open Register > Personnel > Employee

Standard documents are all documents related to employees, such as passports, visas, training certificates and licenses, that entitle an employee to serve onboard a specific ship. Documents listed here will be available in the Education/License, Medical Info. and Passport tabs in the Employee Overview window.

All documents can be stored in AMOS Personnel as scanned images or attachments. The crew manager must follow up documents that have expired or are due to expire.

The register is divided into three categories:

- ID Books
- Licenses
- Qualifications

Each category has a sub-list of registers into which you can add documents. These sub-lists are created in the Standard Document Type register. AMOS Personnel has some pre-defined document sub-lists, and the user company can use these and/or define others as required.

3.17.26 Standard Document Type

File > Open Register > Personnel > Employee

This register is for creating certificate and document categories to add to the list in the Employee Overview > Educ.License tab.

- Use the **Doc. Parent** field to select the document group in which the document type is to be registered.
- Use the **Certificate Type** field select the certificate group in which the document type is to be registered.
- Enter the number of days advanced warning you want to have that this document type is about to expire, in the **Expiry Warning** field.
- The **Sequence** number defines the order in which the items are listed in the select boxes. The document types are listed in the Standard Document register in alpha/numerical order based on the codes.

You must link a new document category to the specific Employee Detail tab in which you want it to appear. This is done in the Employee Details register.

3.17.27 Termination Reason

File > Open Register > Personnel > Employee

This register defines the reasons that an employee's contract can be terminated. The data is used in the Employee Overview window Contract tab.

3.17.28 Trade Union

File > Open Register > Personnel > Employee

This register defines the names and codes of the various Trade Unions to which employees can belong. You can set the fee as a percentage or amount of wage to deduct automatically from employees' salaries, and a maximum amount that can be deducted.

3.17.29 Airport

File > Open Register > Personnel > General

This register is a list of the airports that the employees need to use. The data is used in the Employee Overview window.

3.17.30 Crew Effect Type

File > Open Register > Personnel > On Board Administration

The information you enter in this register defines the types of personal effects the crew members can have, for use in customs declarations. These items could include for example radios, cigarettes, spirits, etc.

3.17.31 Ship Store Type

File > Open Register > Personnel > On Board Administration

The information you enter in this register defines the types of Ship Stores.

3.17.32 Slopchest Departments And Locations

File > Open Register > Personnel > On Board Administration > Slopchest

This register is for creating the dedicated departments and locations that are used by the Onboard Administration module.

3.17.33 Slopchest Stock Class

File > Open Register > Personnel > On Board Administration > Slopchest

The items defined in this register populate the Stock Class field in the **Slopchest > Stock Item** filter and window.

3.17.34 Employee Details

File > Open Register > Personnel > System

The Employee Details register is a folder containing four sub-registers. These correspond to tabs in the Employee Overview window: Family, License, Medical and Passport/Visa.

After you have created a new button in the Standard Document Type register, use the Employee Details register to define on which of the Employee Overview tabs the button is displayed. Note that a set of buttons is defined as default for each tab, but these can be changed or added to if required.

The method for adding a button to a tab is identical for all the tabs.

NOTE: This setup is normally completed when AMOS Personnel is first installed in the company, and it is very unlikely that it will be changed afterwards.

To Add a Button to a List

1. First, define the new category in the Standard Document Type register.
2. Click on the appropriate sub-register - Family, License, Medical, Passport/Visa - in the **Personnel Registers > System > Employee Details** folder. Existing buttons on the corresponding tab will be listed.
3. Click the **New** button in the toolbar.

4. Click in the **Code** field to open a drop-down list of the registered codes, and select the required code from the list.
5. Enter the required information into the **Title** and **Description** fields.

   The number you type into the **Sequence** field defines where in the list of buttons on the tab this one will be displayed. For example, if you type 1 into this field, this button will be displayed at the top of the list of buttons. You may need to re-number existing buttons.
6. **Mandatory** - If this check box is ticked, then this is a standard button and it must not be deleted or changed.
7. Click in the **Standard Doc. Type** field to open a list of the standard document types, and select an item from the drop-down list.
8. **Save** the changes.

To delete a button from the list select it and click the **Delete** button.

3.18 Payroll Registers

The Payroll registers are accessed at **File > Open Register > Payroll.**

Read about these registers in more detail in the *AMOS Business Suite Personnel User Guide*.

3.18.1 Accumulators

File > Open Register > Payroll > Accumulators

This register is for defining the codes and descriptions for the various accumulators that wage types can be linked to in order to be accumulated.

3.18.2 Banks

File > Open Register > Payroll > Bank

This register defines the information for the different banks that employees belong to.

3.18.3 Bargain Agreement

File > Open Register > Payroll > Bargain Agreement

This register defines the details of any bargain agreements between your company and its employees. Members of one trade union all have the same bargain agreement. Wage types and wage rates for each rank are linked to the bargain agreements. The defined bargain agreements are linked to employees in the Contracts tab of the Employee Overview window.

The Options menu for bargain agreements contains two options, allowing you to adjust the wage scale as needed:

Edit Wage Scale

Select **Options > Edit Wage Scale** to input and edit the details for all the fixed wages such as overtime, leave pay per month, etc. All wages are inserted here by rank. You can filter by rank, ship category or seniority. The number in the Seniority column indicates the number of months an employee must have service for before that particular wage scale will be automatically selected.

Future Wage Scale

At certain intervals the employees in your company will get pay raises. Inserting these new wages can be a time consuming job and must be done in advance. In the Future Wage Scale Setup window you can insert the new wages in advance, and set the date they are valid from. While this job is being completed in advance, the current wage rates will still be in use.

3.18.4 Currency Rounding

File > Open Register > Payroll > Currency Rounding

Use this register to select specific currencies for rounding. These currencies are then rounded in the payroll functions.

3.18.5 Period

File > Open Register > Payroll > Period

This register defines the Month and Year of the first period when you start using the payroll.

- From the drop-down list, enter the next sequential number for the next new period. It should correspond with the number of the period month, i.e. the number for February is 2.
- In the **Period Year** field, enter the correct year.
- In the **Description** field, enter the month and year for the period, i.e the period for February 2006 is called 02/06.

You cannot delete any records from this register. When you close a period, a new row is automatically added to the list, and previous periods cannot be deleted.

3.18.6 Wage Type

File > Open Register > Payroll > Wage Type

This register is for defining the details of every wage type employees can hold. You can assign an **Identification** value to a wage type: Undefined, Variable, Fixed or Calculation. Then, if the system parameter Variable Transactions - 'Identification Filter' is set to True users will be able to filter wage types by these identifications when defining variable transactions. This restricts what could otherwise be a very long list when selecting the wage type which applies on a variable transaction.

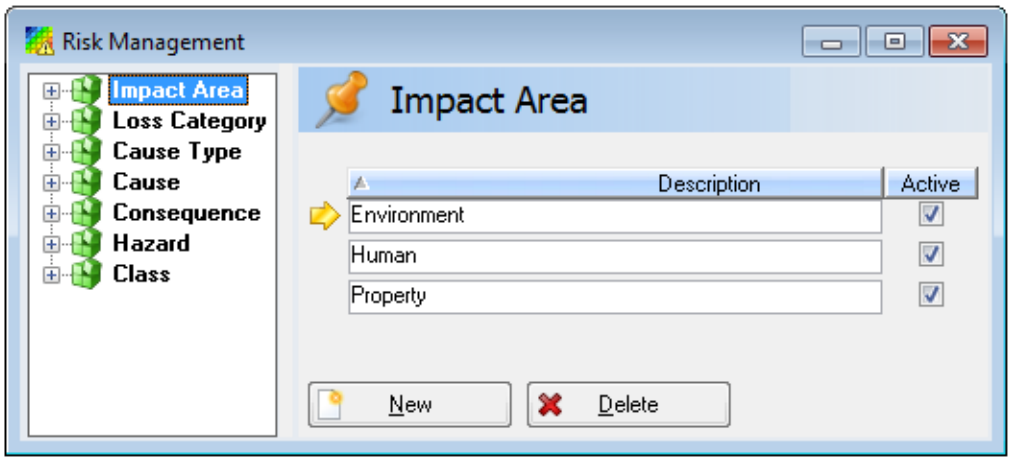
There are two selections on the Options menu:

- **Edit Formula** - To use a wage type in a calculation, place the cursor in the Wage Formula field and select **Options > Edit Formula**. The Wage Formula window opens and you can make changes to the formulas for wage types and accumulators as necessary.
- **Clear Formula** - Select **Options > Clear Formula** to clear the Wage Formula field.

3.19 Risk Management Registers

Before any scenario types can be defined, set up the registers defining all the information the types will draw on.

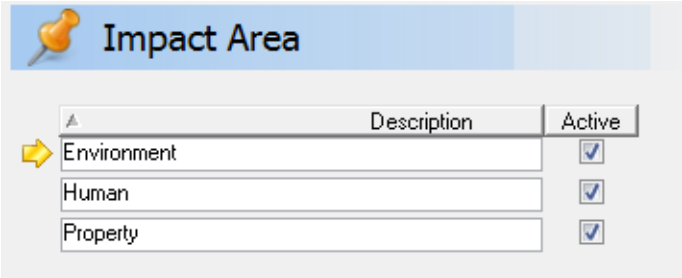
File > Open Register > Risk Management >



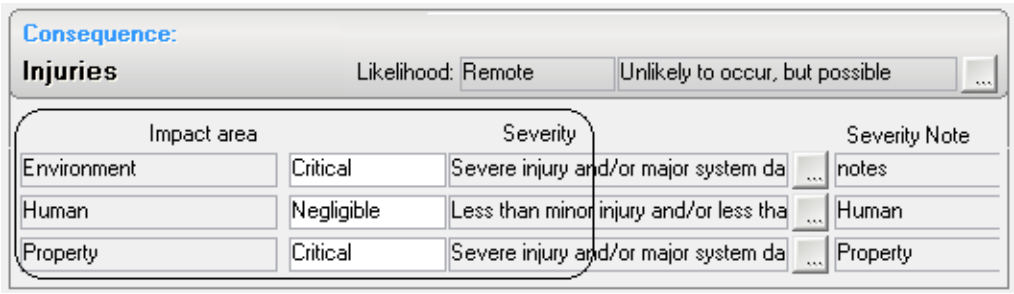
Add to any register by selecting it and clicking the **New** button at the bottom of the window.

3.19.1 Impact Area

Select the **Impact Area** register in the hierarchy and define a list of areas which could be impacted by the occurrence of consequences brought on by hazardous actions:



A degree of **Severity** can be applied to each area during consequence evaluation:



3.19.2 Hazard

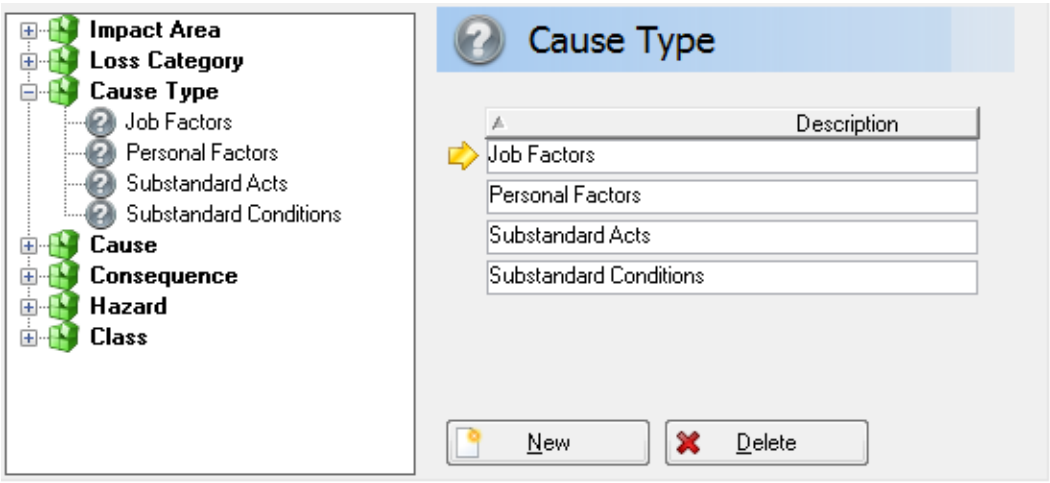
Hazards may occur during a risk scenario: hazards are made up of the actions which *cause* them, and the resulting *consequences*.

> **EXAMPLE**
>
> In some scenarios, you think the following hazard could occur:
>
> Breaking Ropes and Wrong Handling
>
> You define **Causes** for this hazard such as improper training, fatigue or worn out materials.
>
> If this hazard does occur, it could result in **Consequences** like injuries or fatalities.

Set up the Cause Type, Cause and Consequence registers first. Then, use that information to define the content for the Hazards register.

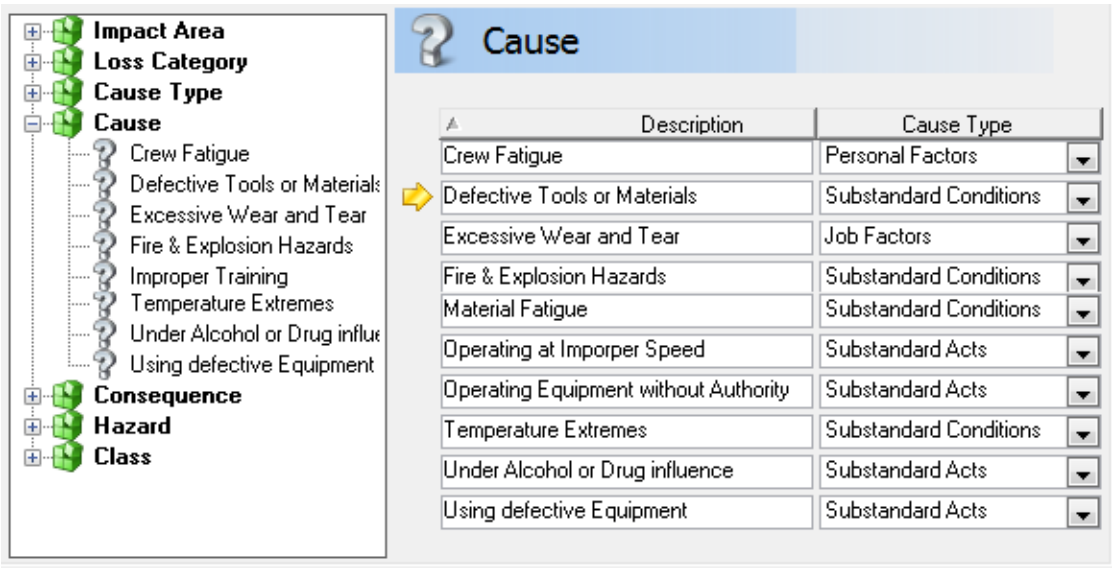
3.19.2.1 Cause Type

Select the **Cause Type** register in the hierarchy and create a list of categories for the causes of hazards:



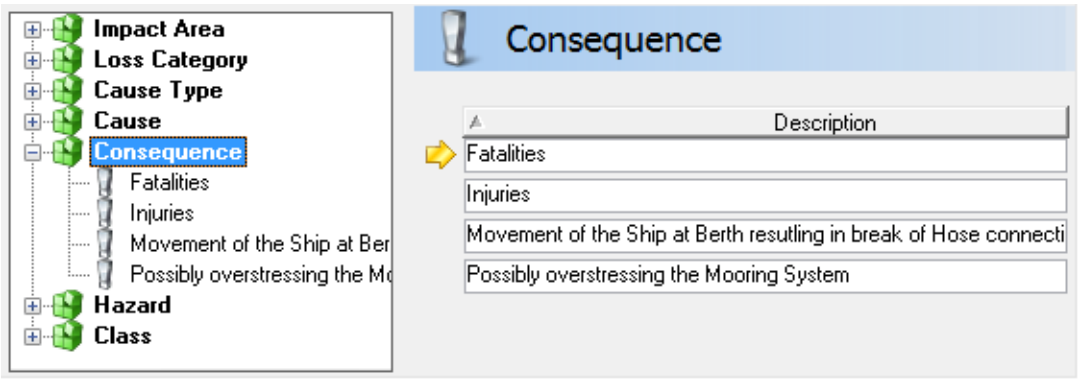
3.19.2.2 Cause

Select the Cause register in the hierarchy and create a list of causes of hazards.Then select a cause and assign a **Cause Type**:



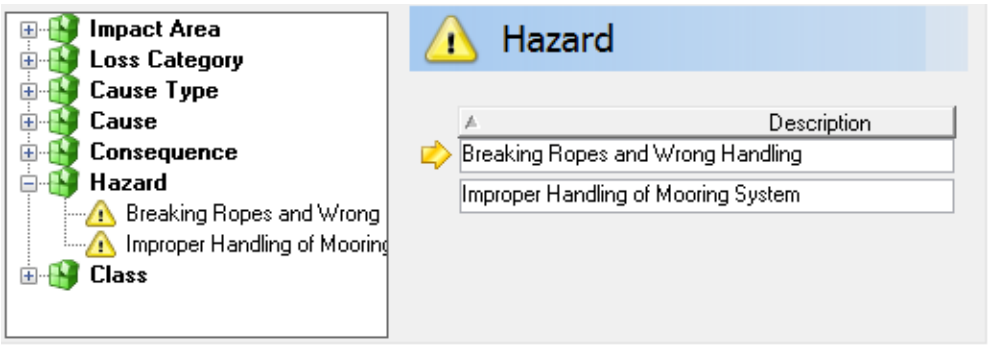
3.19.2.3 Consequence

Select the **Consequence** register in the hierarchy and create a list of consequences which could follow if a hazard occurs:

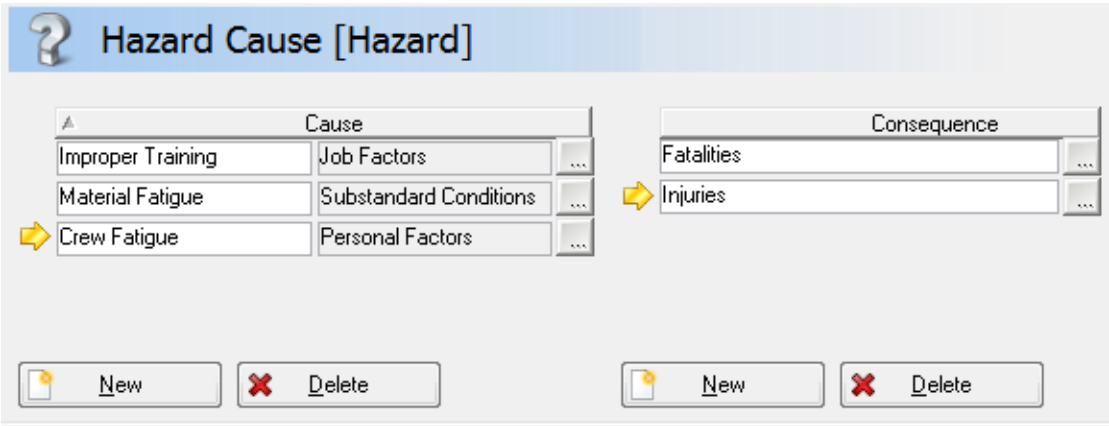


3.19.2.4 Hazards

Select the **Hazard** register in the hierarchy and create a list of possible hazards:

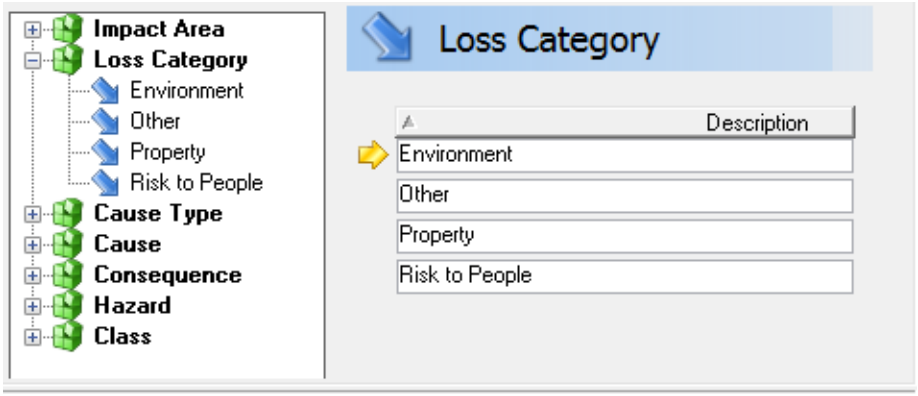


Select a hazard, and click **New** on the bottom left side of the tab to lookup a **Cause**. Click the **New** button on the bottom right side and lookup a **Consequence**. Add as many as you need:



3.19.3 Loss Category

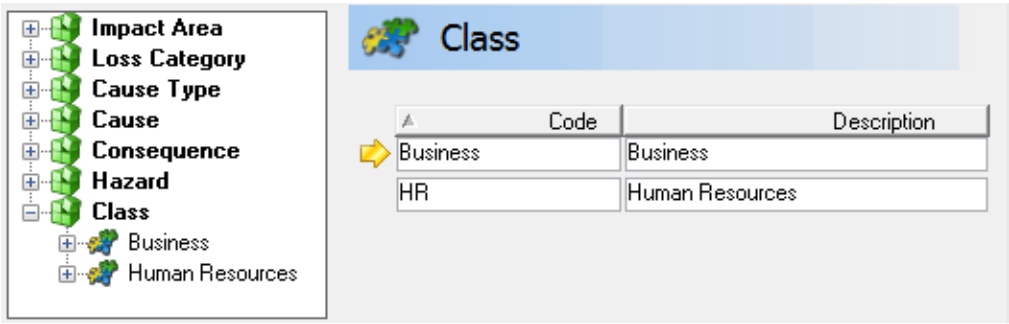
Select the **Loss Category** register in the hierarchy and create a list of categories which could be affected by the consequences of any hazard:



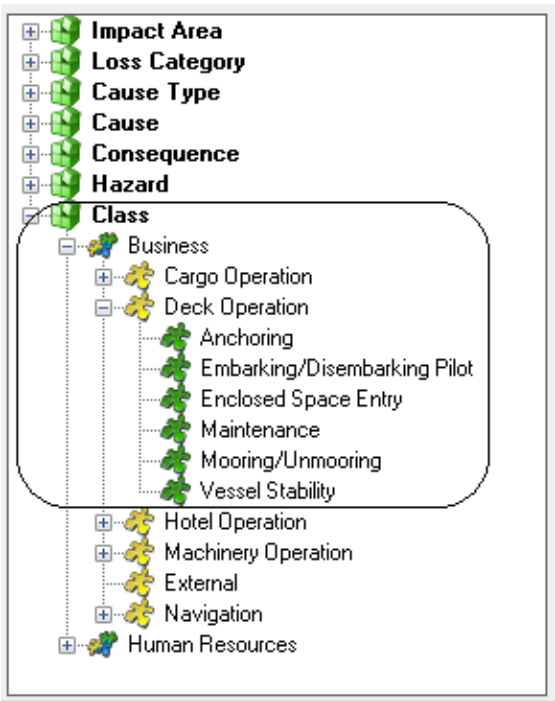
3.19.4 Class

Risk scenario types are defined using the *classes*, *categories* and *groups* created in the **Class** register.

Select the **Class** register in the hierarchy and create a list of classes:



Select a class to add categories and then select a category to add groups:



3.20 Tools Menu Registers

Certain registers are accessed via the Tools menu.

3.20.1 Approval Limits

You can create a set of Approval Limits to define the maximum amount a given group is allowed to approve. The limits are defined in the selected Base Currency Code.

Select **Tools > Configuration > Access Control > Approval Limits** to open the following window:

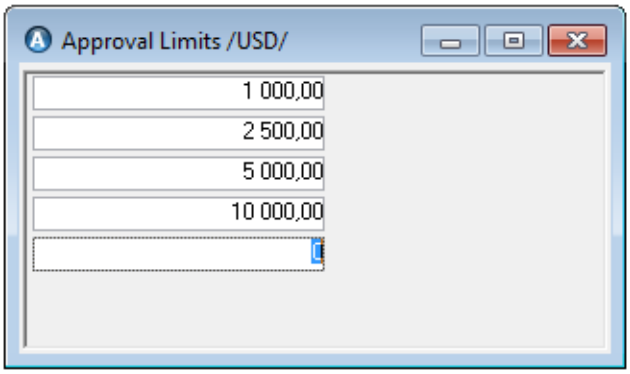


Figure 60 The Approval Limits Window

Click the **New** button to get a blank line and enter a value. You do not need to specify a currency - your **Base Currency Code** is used by default. The Approval Limits are automatically sorted in ascending order the next time the window is opened.

Since Approval Limits apply to Groups and not Users, any User that is a member of a particular Group can approve purchases at a level less than or equal to their Approval Limit. If the User is a member of more than one Group, then the highest Approval Limit of the Groups the User is a member of applies.

See Chapter 14 for assigning Approval Limits to Groups.

3.20.2 Account Code Categories

Tools > Configuration > Accounting > Account Code Categories

Account Code Categories are for grouping similar Account Codes together. Click the **New** button on the toolbar to create a new category in this register.

Enter a numerical value in the **Sequence** field and a name for the category in the **Label** field. There are three account **Types** to choose from:

- **Balance** - Balance category accounts accumulate value: for example stock accounts, capital value acounts, fixed asset accounts, etc. Order Forms must have Account Codes registered in the Balance Category.
- **Class of Cost** - Class of Cost category accounts record expenses. Work Orders must have Account Codes registered in the Class of Cost Category.
- **Generic** - Generic category accounts have no restrictions on how they can be used. They exist mainly for backwards compatibility with earlier versions of AMOS which did not have Account Code Categories; however since they do not have the restrictions places on the other two account type categories, they can be used broadly.

See Chapter 5 for more about Account Codes and Account Code Categories.

3.20.3 Cost Centres

Tools > Configuration > Accounting > Cost Centres

This register is for defining and maintaining Cost Centres. Cost Centres are separate financial areas that you register expenses against and record where resources are used. A Cost Centre can be a Department, a collection of Departments, a machine or collection of machines or any other unit/collection of units that your company wants to record transactions and costs against.

To read more about Cost Centres and their use in accounting, see Chapter 5.

3.20.4 Transaction Codes

Tools > Configuration > Stock > Transaction Codes

Transaction Code parameters are for connecting expenses to specific budget dimensions, such as Responsible or Project. Once the code parameters have been defined, this register is for entering a list of code values.

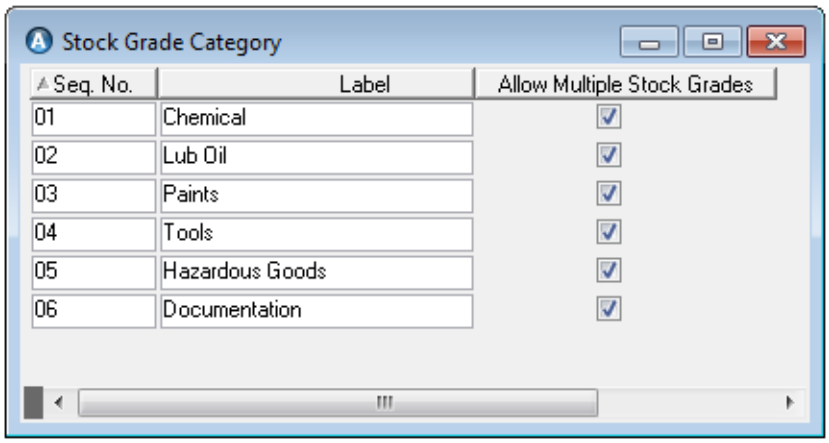
To enter a new transaction code click the **New** button and then use the drop-down list at the top of the window to select the transaction code label to enter values for.

See Chapter 26 for more about this register and its related functionality.

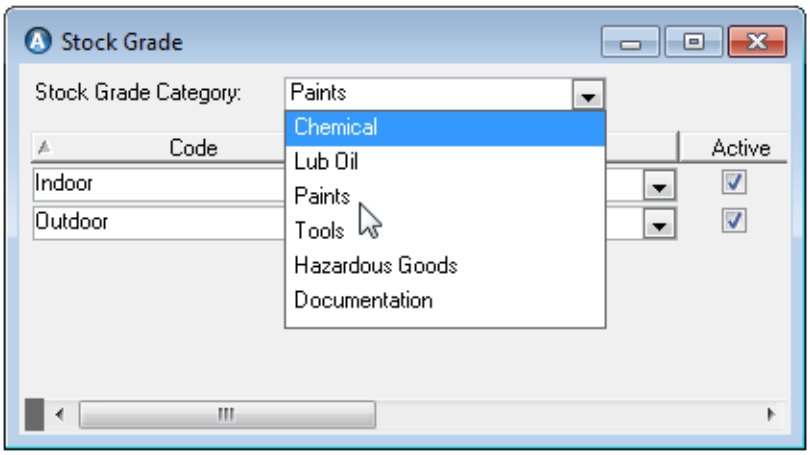
3.20.5 Stock Grade Categories

Tools > Configuration > Stock > Stock Grade Categories

The Stock Grade Category register is for creating and maintaining the categories available in the Stock Grades register, for example Paints, Tools, Chemicals, Hazardous Goods, Documentation:



Stock grades added to the Stock Grades register will then be grouped into these categories, like: Chemicals > Liquids, Solids. Paints > Indoor, Outdoor:



Eventually the stock grades will be applied to stock types/items, for use on purchase forms. To allow more than one grade from the same category to be defined on the same stock type/item, flag the **Allow Multiple Stock Grades** checkbox on any category in the Stock Grade Categories register:



If you uncheck the box on any category, only one stock grade from that category can be applied to the same stock type/item.

Read more about applying stock grades in the *AMOS M&P User Guide*.

3.20.6 Depreciation Levels

Tools > Configuration > Stock > Depreciation Levels

The Depreciation Levels window is for defining rates of depreciation independently of depreciation time periods. This is particularly useful where regional accounting methods demand such flexibility.

Read more about using Depreciation Levels on stock items in the *AMOS M&P User Guide.*

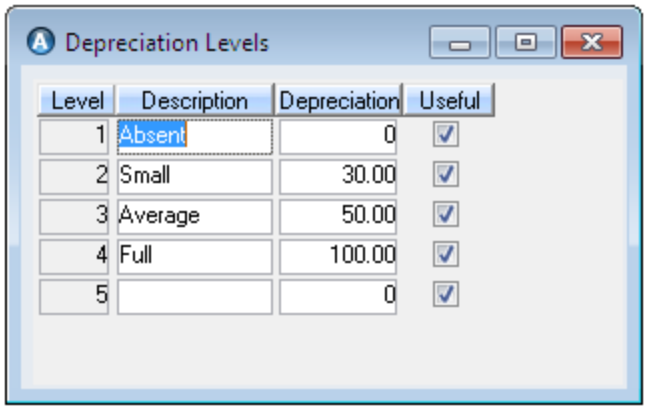


Figure 61 The Depreciation Levels register

CHAPTER 4 Export/Import: Data Synchronisation

Data Synchronisation is the process by which data is transferred between sites within your company. The most common type of transfer is between the head office site which contains all data from all sites, and the various remote sites.

This Chapter briefly explains the process of exchanging data between the head office and the remote sites within your organisation. Select **File > Export/Import** to access the sub-menu containing the commands for exporting data from and importing data into AMOS Business Suite databases.

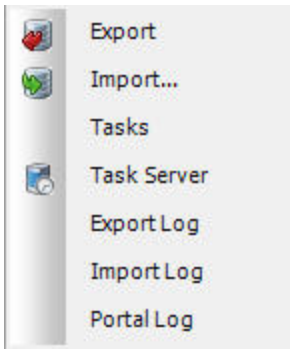


Figure 62 The Export/Import sub-menu

4.1 Exchanging Data With The Head Office

Your AMOS Business Suite database contains data about stock levels, requisitions for purchases and other information that needs to be sent to your head office at regular intervals. To do so, data needs to be exported from the local database and transferred. Similarly, data from the head office needs to be imported.

Data synchronisation is the process by which data is transferred between sites within a company. The most common type of transfer is between the head office which contains all data from all sites, and the various remote sites.

AMOS is set up so that this data exchange can be automated using AMOS Replication. It is only necessary to initiate specific tasks according to a defined schedule. AMOS then automatically takes care of the data export or import, and the transfer of data.

It is also possible to handle import and export of data 'manually'. This may be necessary if a problem occurs with the automated tasks, or if your organisation has set up AMOS to handle data exchange manually.

This Chapter covers the following topics:

- Automated Export and Import: Tasks and the Tasks Server;
- Manual Export and Import;
- Selection File Commands;
- Setting up for Export and Import: Transfer Directory and File Extension parameters;
- Export Log, Import Log and Portal Log

4.2 Automated Export And Import

To automate export and import:

1. Define Tasks. See section 4.2.1.
2. Run the Tasks Server. See section 4.2.2.

Tasks are associated with selection files and allow you to export or import information based on the rules in the selection files. The Task Server further automates this process by allowing you to export and import automatically based on a schedule you enter, as opposed to performing the export/import task manually.

4.2.1 Tasks

To create a task to handle export of data from the local database; import of data to it; or to handle other automated tasks:

1. Go to **File > Export/Import > Tasks** to access the export/import Tasks window.
2. Filter for an existing task or click **OK** to open the window.

3. Click the **New** button on the toolbar.

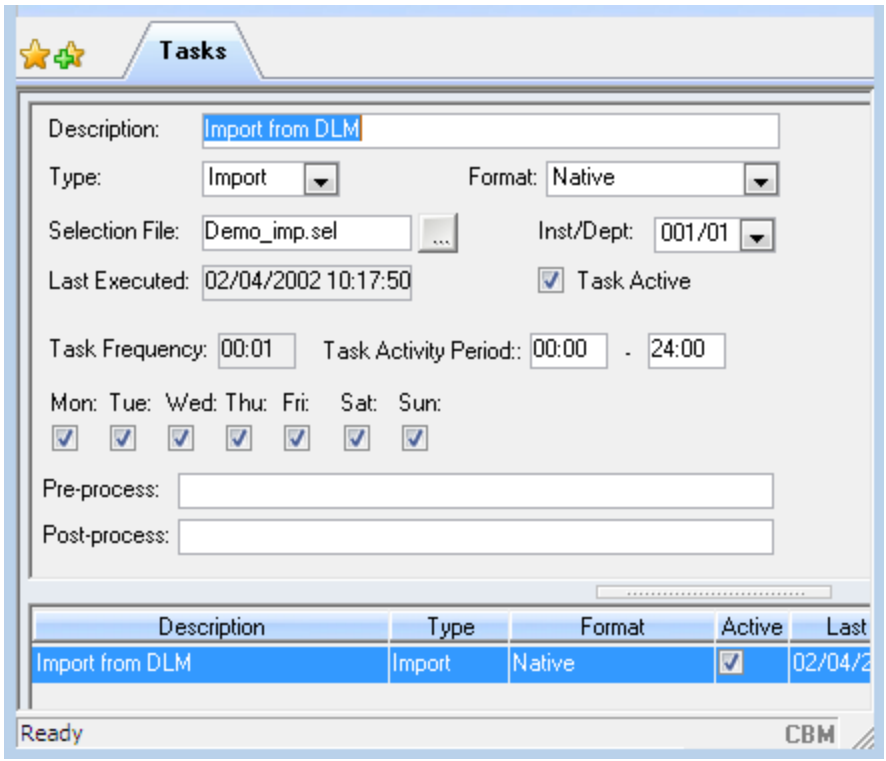


Figure 63 The Tasks Window

4. Enter the task's function in the **Description** field.
5. Select the **Type** of task. There are three options.

- **Import** - import tasks are designed to import specific files from the main location into the AMOS database.
- **Export** - export tasks are designed to export files from the local AMOS database to transmit to the main location.
- **Generic** - Generic tasks handle various system maintenance tasks. For example, after files are successfully imported, there may be a defined task to compress the imported files, archive them and delete the files on the directory, clearing it for the next batch of files to be handled.

6. The **Format** drop-down list contains the options for the format of the file. Select a format.

- **Native** - corresponds to exports or imports
- **Generic** - corresponds to the ShipNet interface
- **Portal** - corresponds to AMOS HTML e-Business solutions
- **Remote Work Flow** - corresponds to the ability to perform work flow actions remotely. This option will only appear in the list if the system parameter 'Use Remote Work Flow' is set to TRUE.

7. Choose the **Selection File** for native tasks.
8. Choose an **Installation/Department** - the site where the import and export logs are kept.
9. Add information about when and how often to perform a task:

- **Task Frequency** - the number of minutes between task execution.

- **Task Activity Period** - the time frame during which the task can occur.
- If the task is only performed on certain days of the week, make sure that the correct **weekdays** are checked.

10. The **Pre-process** and **Post-process** fields are for naming batch files to carry out before and after the selection file. Use the file extensions .Bat, .Com and .Cmd. For example, a pre-process batch file may be defined to get e-mail files containing data to be imported by a task, and a post-process batch file may contain commands to delete imported files. Such files should be located on the same directory as the selection file for the task. If not, the full path of such files should be provided.
11. To temporarily de-activate a task, unflag the **Task Active** box. Flagging the box specifies that the task will run when the Task Server is activated.
12. **Save** your task.

To perform a defined task manually:

1. Select a task in the list.
2. Go to **Options > Perform Task** to execute it.

4.2.2 Task Server

To automate the execution of defined import/export tasks:

1. Go to **File > Export/Import > Task Server.**
2. Filter for the types of **Tasks** and **Formats** to process:

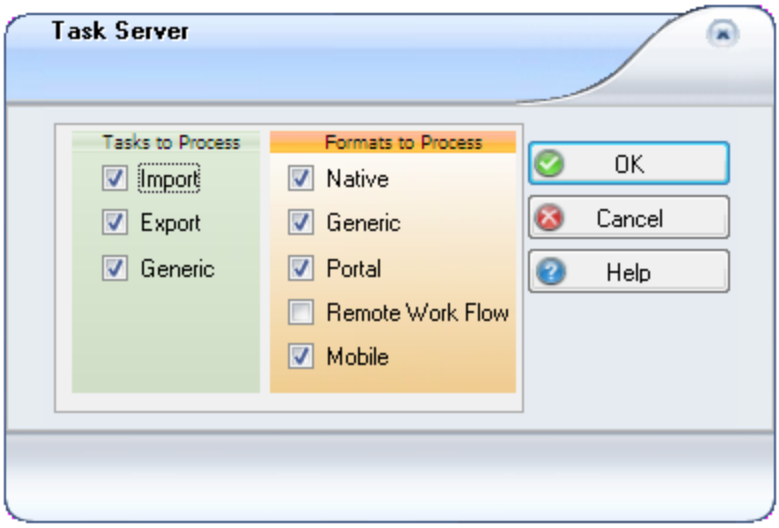


Figure 64 The Task Server Filter

A checkbox labelled **Remote Work Flow** will also be present in the **Formats** list, if the system parameter 'Use Remote Work Flow' is set to TRUE.

3. Click **OK**. The tasks being processed are listed in the Task Server window. You can delete tasks here if necessary.

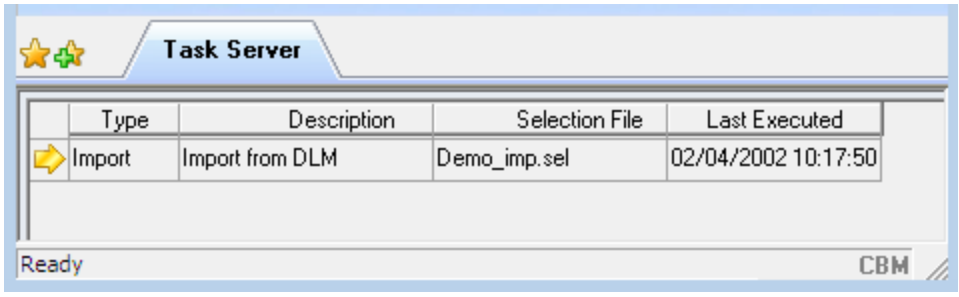


Figure 65 The Task Server Window

To automate the task server operations using command line parameters:

The parameters available are:

- /Login=user/password
- /Taskserver=all | import | export | generic
- /StartIn=inst/dept

Example string:

C:\Program Files\AMOS\AMOS Business Suite\amosw.exe /Login=sysop/abcde /Taskserver=all /StartIn=002/01

4.3 Manual Export And Import

If no automated tasks are defined, you can perform them manually.

4.3.1 Manual Export

When manually exporting/importing, you choose the **Selection File** and specify the **File Name**. This is useful for error corrections, but does provide opportunity for error: for normal data transfer, using tasks is recommended. For more about selection files, see section 4.4.

To perform a manual export:

1. Go to **File > Export/Import > Export**.
2. Choose the export **Format**. Add a **Description** to the export if required.
3. Specify a **Selection File** to handle the control file for the export operation. The default file extension of such files is .SEL. Click the lookup button and AMOS will look for a selection file in the defined Transfer directory.
4. Specify the file to be exported in the **File Name** field.
5. Click **OK**.
6. Export files are given numbers, and the number is automatically incremented by one from the last export when you go ahead. If the export process fails, click the lookup button again and select an existing file name. AMOS presents a warning dialog; click **OK** to proceed and overwrite the existing file.

4.3.2 Manual Import

The **File > Export/Import > Import** is the parallel command to **File > Export/Import > Export**, and is for importing data into an AMOS Business Suite database.

For instructions, see section 4.3.1

4.4 Selection File Commands For Import And Export

During data import or export, command files with the file extension .SEL specify how to handle the import or export. There are two types of selection files: import and export.

Export selection files control the information that is sent from the exporting site. Send only the information that is required at the receiving site.

Import selection files control the information that is received at the importing site. It is during these imports that AMOS enforces database integrity: that is, a file is not imported unless all the information is either already in the system or in the file you have received. If information is missing, the import will fail. For this reason, the order in which files are imported is crucial.

4.4.1 Export Selection Files

Export selection files control the information that is sent from the exporting site. Send only the information that is required at the receiving site.

The following commands apply to exports:

MarkedRecordsOnly <On/Off>

Controls whether only marked records are included during export. When On, only records in the data set whose ExportMarker contains a one (1) will be exported. When Off, all records in the data set will be exported.

UnmarkExportedRecords <On/Off>

Controls whether exported records are to be unmarked on export. When On, the ExportMarker value for all exported records will be set to zero (0). When Off, the value in the ExportMarker field will remain the same.

IgnoreDeleted <On/Off>

Controls whether deletion messages are included in the export. When On, deleted records are not exported; when Off, deleted records are exported. If MarkedRecordsOnly is On, IgnoreDeleted is Off by default. If UnmarkExportedRecords is also On, then the DeleteLog is cleared of the deleted data.

Use this command for backwards compatibility when exporting to AMOS M&P versions lower than 2.2.00. Such versions are incapable of processing deletion messages. When this switch is set to **On**, deletion messages are not exported.

Department All/<Installation number/Department number>

Specifies which installation and department to export data from. Use Department All to export from all installations and departments. Typically, the Head Office specifies installations and departments to export from while the remote sites export all information.

DEPARTMENT 002/01

DEPARTMENT 003/02

DEPARTMENT ALL (use carefully at an office site during export).

To process only the current department, do not include any **DEPARTMENT** command in the selection file.

CheckSum <On/Off>

If this is set to On in the export selection file, a checksum will be added to the export data file. This command is not required in the import selection file. If a checksum is found in the export data file, AMOS will verify the file against the checksum.

Register <TableName>

Specifies which register (table) to export. You can combine this command with a criteria for export in the form of an SQL restriction, as below. Note that the keyword is 'If':

If <SQL Select Statement>

Allows you to specify the criteria that the table entries must satisfy to be exported.

When using **If** statements, add the text `amos.' to specify additional tables within the search criteria, as below:

```
Register ComponentType

If ( ( ComponentType.LastUpdated > LASTEXPORTEDDATE ) AND
( ComponentType.CompTypeID IN (SELECT CompTypeID FROM amos.ComponentUnit
WHERE ( DeptID = 235000003 ) ) ) ) OR
( ComponentType.CompTypeID IN ( SELECT CompTypeID FROM amos.ComponentUnit
WHERE ( DeptID = 235000003 ) AND ( ExportMarker = 1 ) ) )
```

The following **keywords** apply to export selection files:

LastExportedDate - the date of the last export for the specified installation/department;

LastImportedDate - the date of the last import for the the specified installation/department; and

Today - the current date.

4.4.2 Import Selection Files

Import selection files control the information that is received at the importing site. It is during these imports that AMOS enforces database integrity: that is, a file is not imported unless all the information is either already in the system or in the file you have received. If information is missing, the import will fail. For this reason, the order in which files are imported is crucial.

The following commands apply to imports:

InsertData <On/Off>

Controls whether new table entries may be added during an Import operation. When On, new records will be inserted into the database. When Off, no new records will be inserted.

StampDate <On/Off>

If this is set to On, the new or updated table has the field LastUpdated set to the current date during import. If set to Off, the date in the LastUpdatedField remains the same. This is useful for importing data and then resending the data to other sites.

StampMark <On/Off>

Controls whether the new or updated table entries have their ExportMarker field set during import. If set to On, the new or updated table will have its ExportMarker field set to one (1) during import. Set to Off, the value in the ExportMarker field remains the same. This is useful for importing data and then resending the data to other sites.

OverwriteOldData <On/Off>

Controls whether updates to already existing table entries is allowed during import. If On, existing records will be updated with the values in the imoprt file. Set to Off, no existing records will be updated.

IgnoreDeleted <On/Off>

When set to On, deleted records are not imported. Set to Off, the deleted records are imported.

Department All/<Installation number/Department number>

Specifies which installation and department to import data into. Use Department All to import from all installations and departments.

Register <TableName>

Specifies which register (table) to import. You can combine this command with a criteria for import in the form of an SQL restriction, as below. Note that the keyword is 'If':

If <SQL Select Statement>

Allows you to specify the criteria that the table entries must satisfy to be imported.

When using **If** statements, add the text `amos.' to specify additional tables within the search criteria.

ExcludeFields <Table Field List>

Allows you to specify any table fields not to update during import; all other fields are automatically included. This command cannot be used in combination with the command IncludeFields.

IncludeFields <Table Field List>

Allows you to specify which table fields to update during import. All other fields are automatically excluded. This command cannot be used in combination with the command ExcludeFields.

The following **keywords** apply to import selection files:

LastExportedDate - the date of the last export for the specified installation/department;

LastImportedDate - the date of the last import for the the specified installation/department; and

Today - the current date.

4.4.3 Selection File Examples

EXAMPLE 1

```
MarkedRecordsOnly ON
UnmarkExportedRecords ON
Register Component
Register JobDescription
```

EXAMPLE 2

```
MarkedRecordsOnly ON
UnmarkExportedRecords ON
Register OrderForm
If ( FormType In (1,3) ) And ( FormStatus In (2,3) )
```

The **If** command is followed by an SQL statement defining the criteria that must be satisfied before exporting a form.

The FormType field may have one of three values:

- 1 indicating a Purchase Order
- 2 indicating a Requisition Form
- 3 indicating a Query

The FormStatus field may have one of five values:

- 1 indicating Active
- 2 indicating Parked
- 3 indicating Filed

- 4 indicating Split
- 5 indicating Cancelled

The above Register command will only export order forms if they are of the type Purchase Order or Query with the status of either Parked or Filed.

EXAMPLE 3

```
MarkedRecordsOnly ON
UnmarkExportedRecords ON
Register OrderLine
If OrderID In (Select OrderID From OrderForm Where ( FormType In (1,3) )
And (FormStatus In 2,3) )
```

This Register command will only export order lines attached to order forms of the type Purchase Order or Query with a status of Parked or Filed.

Read the above **If** statement as follows:

Export the order line if its OrderID (that is the ID of the order to which it is attached) is in the set of OrderIDs in the OrderForm table satisfying the condition that the order form type is PurchaseOrder or Query with the status Parked or Filed.

EXAMPLE 4

```
Prerecord Off
Register ComponentType
If ( CompName Like '%pump' ) And ( VendorID In ( Select AddressID From Address Where
Code Like '%SPEC'))
```

EXAMPLE 5

```
InsertData On
OverwriteOldData On
Register ComponentType
ExcludeFields Misc1
If ( CompName Like '%PUMP')
```

This Register command will only import component types where the name contains the text 'pump', but the field Misc1 will not update during the import.

Selection File Keywords

Three selection file keywords are implemented in AMOS. These are called Today, LastExportedDate and LastImportedDate, and they make it possible to create very flexible selection files. Examples are shown below.

When using keywords enclosed within parentheses (brackets) it is necessary for there to be a single space between a parenthesis and the keyword.

Example:

```
If ( LastExportedDate 0000000.00.)
```

or

```
If (00.0000000. LastImportedDate )
```

Today

If this keyword occurs in the selection file, it is replaced by the current date. Since all dates in AMOS also contain a time component, the value substituted for the Today keyword depends on how it is used. For example, in '>=Today' may be replaced by 1998-05-14 00:00:00.00000 if the date is 14 May. If the expression '<=Today' is used for the same date, the replacement value is 23:59:59.99999.

LastExportedDate

If this keyword occurs in the selection file, it is replaced with the date/time of the last export performed for the installation and department in question.

LastImportedDate

If this keyword occurs in the selection file, it is replaced with the date/time of the last import performed for the installation and department in question.

Here are some examples of how to use these keywords:

```
Register WorkOrder If DueDate <= Today
Register WorkOrder If LastUpdated Between LastExportedDate and Today
Register WorkOrder If LastUpdated >= LastImportedDate and LastUpdated <= Today
```

Avoiding Problems with Import and Hierarchies

To avoid problems with hierarchies during import and export operations, use the command InitDBCmd in the [Import] section of the AMOSW.INI file. The following examples show how to use it for the SQL Anywhere and Oracle databases respectively.

SQL Anywhere:

```
[Import]
DBMS=ODBC
.
.
InitDBCmd01=SET OPTION WAIT_FOR_COMMIT = ON
```

Oracle:

```
[Import]
```

Other Ways to Access Database Commands

You can press the CRTL SHIFT F9 keys together to access database commands. This opens a dialog box where you select a command file to execute commands.

You can also add import and export commands in the [Import] and [Database] sections of the AMOSW.INI file. If you do, number them from 01 to 99. Here is an example:

```
[Database]
DBMS=OR8
.
.
InitDBCmd01=Alter Session Set Optimizer_Mode= First_Rows
```

4.5 Setting Up Export And Import

You can configure AMOS to specify the directory where import and export files are located, and the file extension of such files.

To specify the Transfer Directory:

1. Go to **Tools > Configuration > Parameters**. Expand the 'Directories' folder.
2. Select **Transfer Directory**. This item defines the directory where AMOS expects to find files for import, and the directory to which files are exported. By default the Transfer sub-folder of the AMOS Business Suite installation is selected. You can change this if necessary.

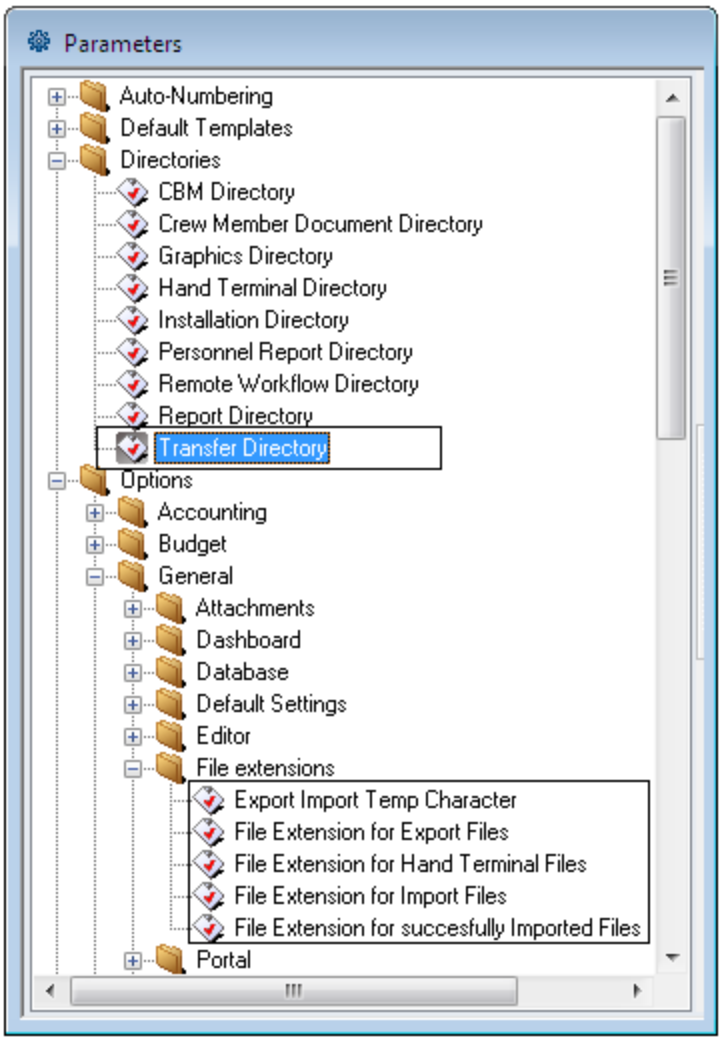


Figure 66 An example of the Parameters window

To define file extensions:

1. Go to **Tools > Configuration > Parameters > Options > General**. Expand the **File Extensions**folder. The default settings are:
   - **EXP** - Export Files, Import Files
   - **HTD** - Hand Terminal Files
   - **OK** - Successfully Imported Files
2. You can leave the parameters set to the default or change them.

   The parameters are:

- **Export Import Temp Character** - allows you to set the characters to be used for split files created during import.
- **File Extension for Export Files** - the system maintains a sequence number for both import and export operations. Since these sequence numbers are used to name the files created by these operations, it is important to be able to differentiate between files created by export and ready for transfer to another site and those received which are ready to be imported. This is done by defining different file extensions for the various files handled by the Import/Export module. This parameter defines the extension for export files generated by the system. Default setting: EXP

- **File Extension for Hand Terminal Files** - a hand terminal may be used to record stock transactions. The data from the hand terminal may be exported in the form of a file, which may then be imported into AMOS stock levels. This parameter specifies the file extension for such hand terminal files. Default setting: HTD
- **File Extension for Import Files** - as a complementary parameter to the parameter File Extension for Export Files, this value defines which extension identifies files ready to be imported by the system. Default setting: EXP
- **File Extension for Successfully Imported Files** - as a complementary parameter to the previous one, this value defines which extension is to be given to import files that have been successfully imported by the system. Default setting: OK

The 'File Extension for Export Files' and 'File Extension for Import Files' are typically set in opposite ways on a location and at the head office.

4.6 The Export Log

To open a list of the log files from export operations, go to **File > Export/Import > Export Log**. Each log file contains log number information:

- Who started it.
- The format of the export.
- When the export took place.
- Which selection file was used.

The **Post Process Status** field contains the number 1 for successful transactions and 0 for unsuccessful ones. If you find unsuccessful transactions, investigate the possible causes.

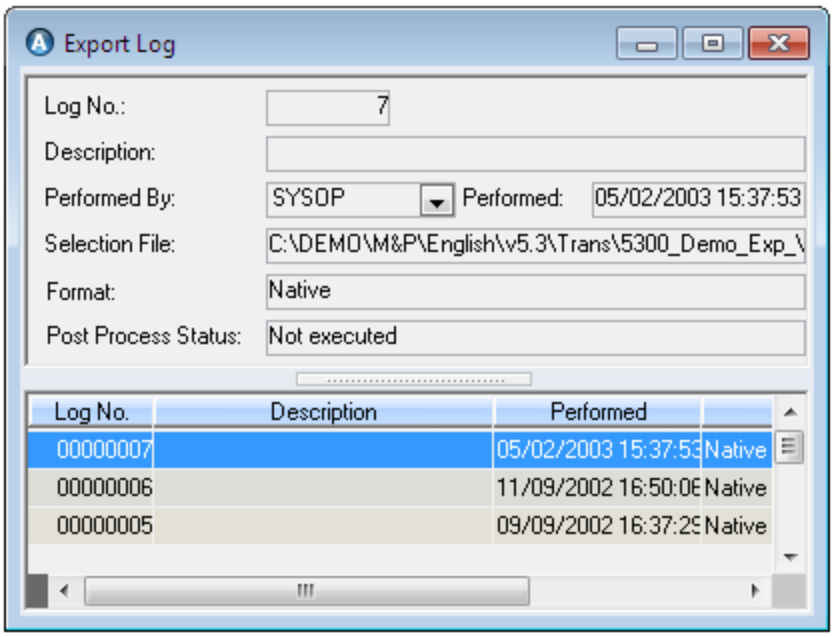


Figure 67 The Export Log

4.7 The Import Log

Go to **File > Export/Import > Import Log** to view the Import Log. This is a log of the import operations.

4.8 The Portal Log

To record and display error messages and related information concerning portal importing, go to **File > Export/Import > Portal Log**.

Click the lookup button beside a **Form No.** to open the original form. In some cases the message is much longer than the field accommodates. To see the whole message move the cursor onto the message and a balloon containing the full error message appears.

There are four parameters associated with the portal log entitled 'Log Successful Portal Operations', 'Show Error Messages During Portal Import', 'Show Error Messages During Portal Export' and 'Store Imported XML Document In Portal Log'. These parameters are described in section 14.11.3.7.

Select **Show XML** from the Options menu for the portal log to display the stored XML document for the selected portal log record.

CHAPTER 5 Defining And Using Attachments

Attachments provide a means for users to connect external files to the AMOS database: standard graphics files (Bitmap, Jpeg, etc.), Word documents, Excel spreadsheets, and Adobe Acrobat files are examples of some of the types of documents you can attach. Additionally, you can link to Internet web pages or internal Intranet sites[1].

To configure AMOS to handle attachments:

1. Define the attachment sources you want to use. See section 5.1.
2. Build a library of attachment references. See section 5.2.

> **TIP**
>
> See section 5.3 for a sample of an attachment source and reference definition using a DDE command for an external viewer.

- Once attachment sources are properly defined, users can add files to almost any window in AMOS, in several different ways. See section 5.4.
- You can also edit the graphic images to create hotspots; and link the hot spots to other graphic images or data objects in AMOS. See section 5.6.

5.1 Defining Attachment Source Tools

Attachments need a defined source to be viewed. AMOS Business Suite offers an internal viewer; you can define other viewers and Windows programs on your PC as external viewers.

To define a source:

1. Go to **File > Open Registers > Attachment> Sources**.
2. Click **New** on the toolbar and enter a **Code** and **Name**.
3. Choose a **Service Type**[2]:

- **Internal**. The AMOS Internal Viewer opens standard graphic images like BMPs, JPGs, etc.

[1]The type of files you can attach and the availability of source tools depends on your system license.
[2]The availability of source tool service types depends on your system license.

- **External**. Opens files created by any type of program like Word, Excel, Adobe Acrobat, etc.
- **Internal Web**.Opens Intranet sites and external websites within AMOS itself.
- **External Web**. Opens Internet sites in your default web browser.
- **Default Association**. Allows for adding files of any type which are not already listed in the Attachment References library to an Attachments tab, by drag and drop or by lookup to the user's computer. Also allows for importing image files from connected devices like a mobile phone or a scanner.
- **AMOS Titanium**. Allows for opening AMOS Titanium screens inside AMOS Business Suite.

4. **Save** the window.

Start Commands

Supplying a **Start Command** is required when you select service type 'External' or 'AMOS Titanium'.

An 'External' service type requires a **Start Command** that points to the external program which will open the attachment file:

<path>\<executable file name> %IMAGE REFERENCE%

%IMAGE REFERENCE% tells the tool to display the attachment reference as supplied by AMOS.

If you know the names and syntax of DDE commands supported by the tool, you can enter one in the **Display Command** field.

> **TIP**
>
> See section 5.3 for a sample of an attachment source and reference definition using a DDE command for an external viewer.

An 'AMOS Titanium' service type requires a **Start Command** which points to the http(s) address to your AMOS Titanium server:

i.e.: http://127.0.0.1:80/AmosTitanium/

Graphics Directory

To correctly display attachments, AMOS needs to know where the files are stored. The storage location is called the Graphics Directory and you can see or define it at **Tools > Configuration > Parameters > Directories >** 'Graphics Directory'.

Attachments can be stored by default in the graphics directory, or stored externally outside of AMOS:

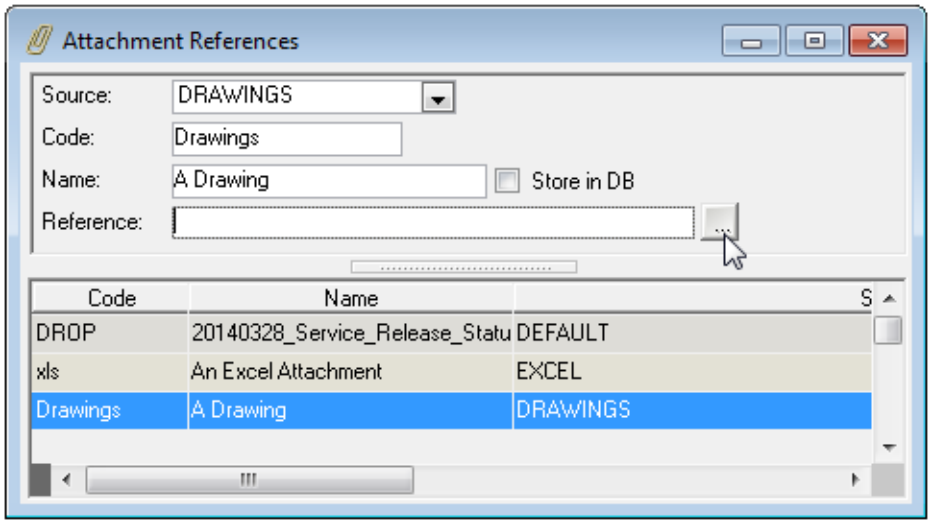
- If you leave the **Graphics Directory** field on an attachment source entry blank, attachments opened from that source can be stored in the parameter-defined graphics directory.
- To store attachments in another directory, define an alternate location on the source entry: use the **Graphics Directory** lookup to browse to a folder in your system.

5.2 Building A Library Of Attachment References

After defining attachment sources, you can begin building a library of references to attachment files for use in AMOS Business Suite. Attachment references can be linked in turn to records in AMOS.

To add an attachment reference:

1. Go to **File > Open Register > Attachment > References**.
2. Click **New**.
3. Give the reference a **Code** and a **Name**.
4. Select the attachment **Source** - the tool defined to open an attachment of this type.
5. Lookup the **Reference** - the path to the attachment file itself:



   Or go to **Options > Select File...** to locate it.

   If you are adding a reference for the **Source** type 'Internal Web' or 'External Web', copy and paste the web address into the **Reference** field and **Save** the record.

   If you are adding a reference for the **Source** type 'AMOS Titanium' enter the Titanium screen in the **Reference** field and **Save** the record. The reference may contain these constants[1]:

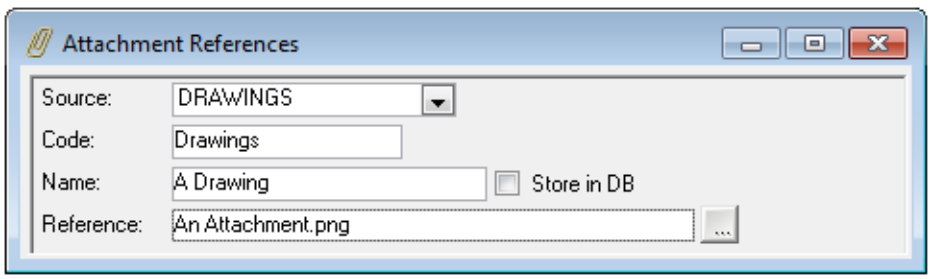
   :AMOS_CURRENTDEPTID

   :AMOS_USERID

6. Select a file in the browser and click **Open** to add it.

   If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[2].

7. **Save** the reference:



To open up and see the file, go to **Options > View Attachment**. To remove it click **Delete**. To add these attachments to records in AMOS, see section 5.4.1.

[1]Refer to the documentation for AMOS Titanium for usage of such constants, and other details.
[2]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments File Operation'.

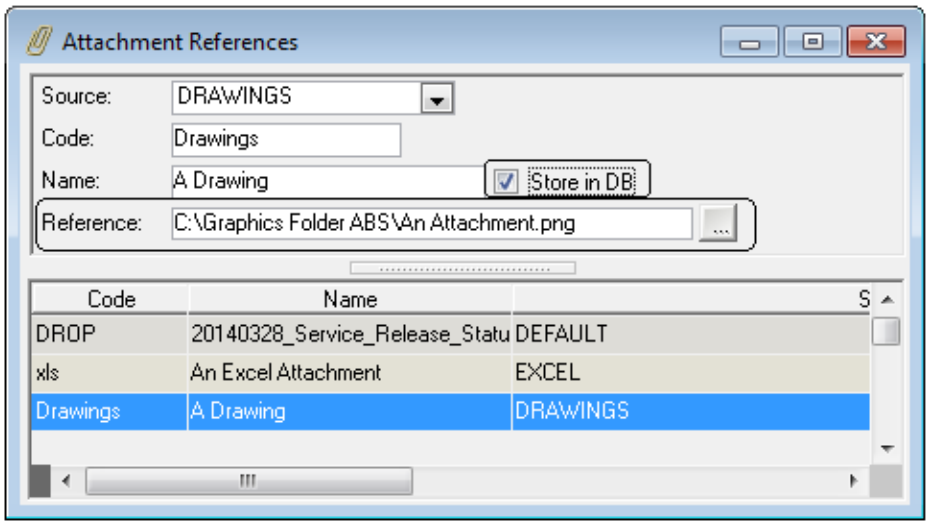
> **TIP**
>
> See section 5.3 for a sample of an attachment source and reference definition using a DDE command for an external viewer.

Storing Attachments in the Database

If you save a reference to a file in a folder that is only available to you, no one else will be able to open the file unless it is stored in the database or added to a shared Graphics Directory that is available to all users.

Storing in the database adds the file into your AMOS database and so it will be available to everyone sharing that database. However, this does increase the size of the database, depending on the size and number of attachments.

To store an attachment in the database, flag the **Store in DB** checkbox on the reference:



NOTE: When an attachment is stored in the database AMOS also stores the original file reference, enabling users to remove the file at a later date. If the original file is found the attachment is removed from the database. If the original file is not found a warning is displayed. If a user proceeds with the removal after the warning message the attachment file is deleted.

When an attachment which is not already stored in the database is added onto an Attachments tab, AMOS will refer to the setting of the parameter 'Attachment File Stamp'[1] to determine if the date and time on the file should be left as is, or updated to match the date and time found on the database server.

5.3 Source And Reference Definition Example

Following is a sample of an attachment source and a reference defined for an external viewer using a DDE command:

On the Attachment Sources register, specify:

Code - Excel

Name - Excel

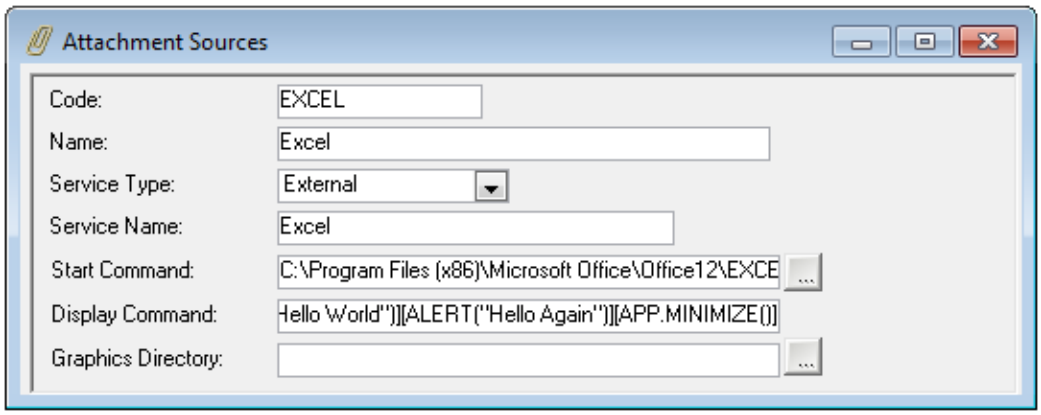
Service Type - External

[1] Tools > Configuration > Parameters > Options > General > Attachments > 'Attachment File Stamp'

Service Name - EXCEL

Start Command - C:\Program Files(x86)\Microsoft Office\OFFICE12\EXCEL.EXE%IMAGE REFERENCE%

Display Command - [ALERT("Hello World")][ALERT("Hello Again")][APP.MINIMIZE()]



Save the source.

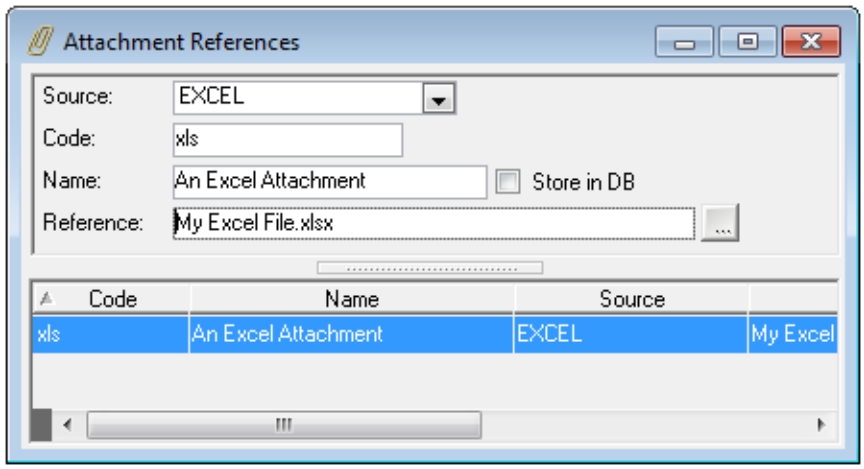
On the Attachment References register, specify:

Source - Excel

Code - xls

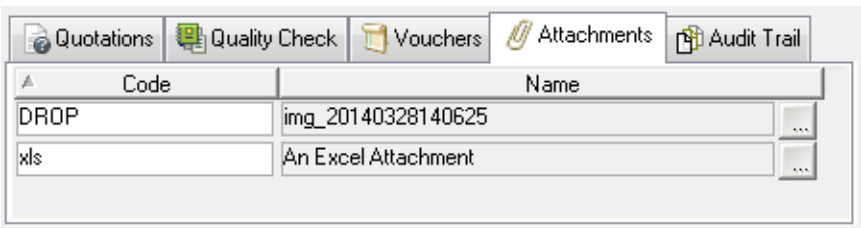
Name - An Excel Attachment

Reference - <an xls file>



Save the reference.

Link the reference to an attachments tab in AMOS:



Save the tab. Select the attachment and click the **View** button.

When a user views this attachment, AMOS will:

1. Start Excel with the xls file.
2. Send a message call to Excel.
3. Send a message call to Excel again.
4. Send an instruction to minimise Excel.

5.4 Adding Attachments In AMOS

There are several different ways to add attachments to records in AMOS.

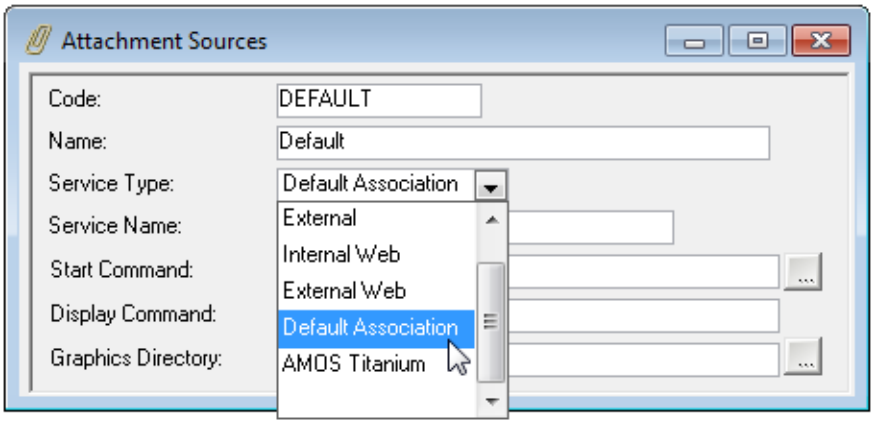
To add attachments which are already listed in the Attachment References register:

- use the **New** button in the Attachment tabs. See section 5.4.1.

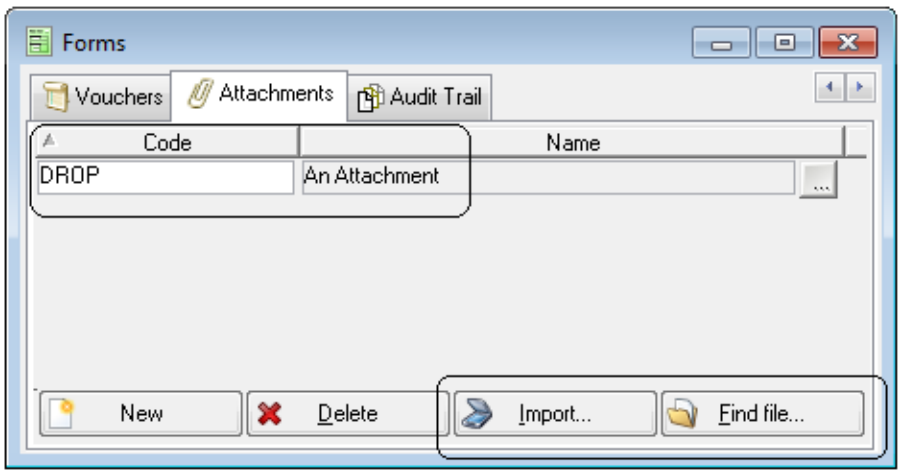
You can also add attachments which are not already registered in the Attachments References library. This creates your library of attachment references as you go:

- use the **Find File** button to browse on your computer for a file. See section 5.4.2.
- drag and drop them onto an Attachments tab. See section 5.4.3.
- import them from a connected device. See section 5.4.4.

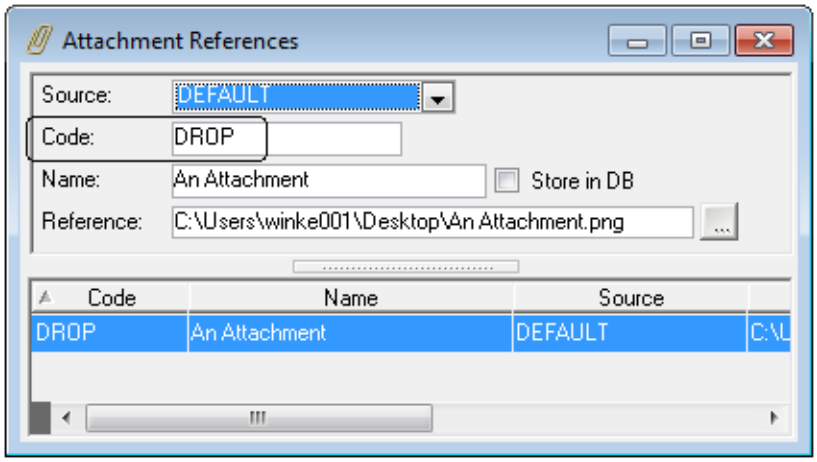
To add attachments which aren't already inserted in the References register, you require an Attachment Source with **Service Type** 'Default Association':



Once the attachment source is saved, users can drag and drop, or lookup or import any file using the buttons on Attachment tabs:



AMOS will list the files added this way in the tab and in Attachment References register, with the **Code** 'DROP':

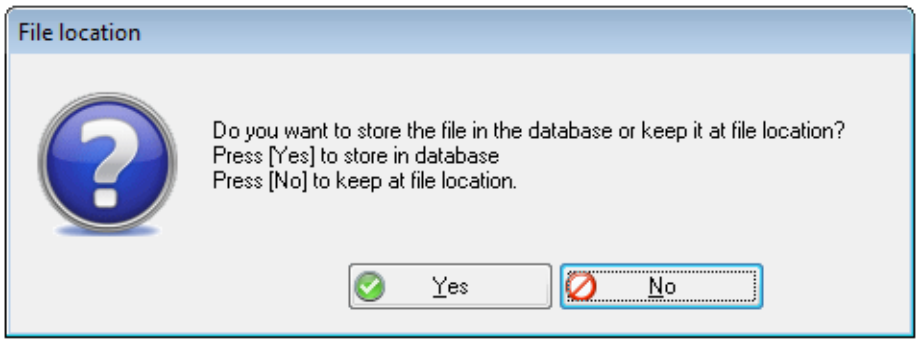


You can change these details in the Attachment References register as well as opt to store the file in the database at this point if it is not there already.

Every time an attachment is added in one of these three ways, AMOS considers the following parameters.

- **'Attachments Store in Database'**. Attachment files are not stored in the AMOS database unless you specify to do so. This parameter gives the user the option of storing the attachment in the database upon insertion.

  When set to ALWAYS or NEVER, the file is always or never stored in the database. When set to ASK and a user attempts to drag and drop/lookup/import an attachment, AMOS will ask if the file should be stored in the database or left at its current location:

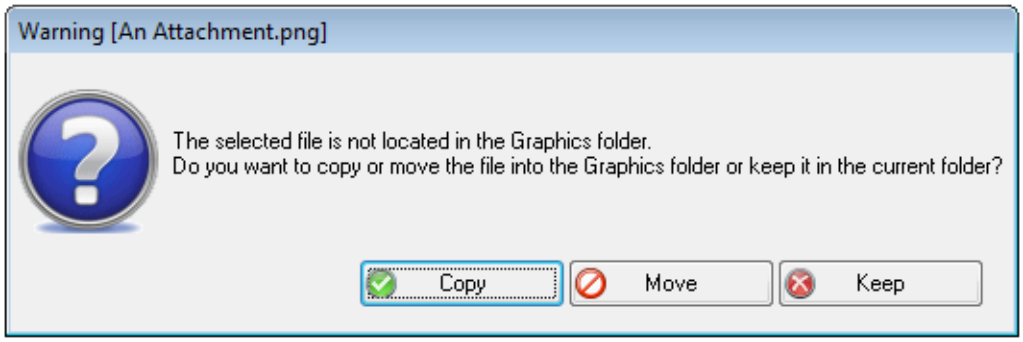
  

  Files stored in the database will have the checkbox **Store in DB** marked automatically on the associated attachment reference and the file is stored in the ImageFile table.

- **'Attachments File Operation'**. If a file is not already stored in the current installation's Graphics Directory, AMOS handles it according to the setting of this parameter.

  Set to WARN the user will be notified that the file is not in the installation's Graphics folder and prevented from attaching it until it is added to the Graphics folder. Set to COPY, the attachment file will be copied automatically to the Graphics folder without a user message. Set to MOVE, the file will be moved to the Graphics folder without a message to the user. Set to ASK, AMOS will ask the user whether to copy or move the

image file into the Graphics folder, or keep it where it is:



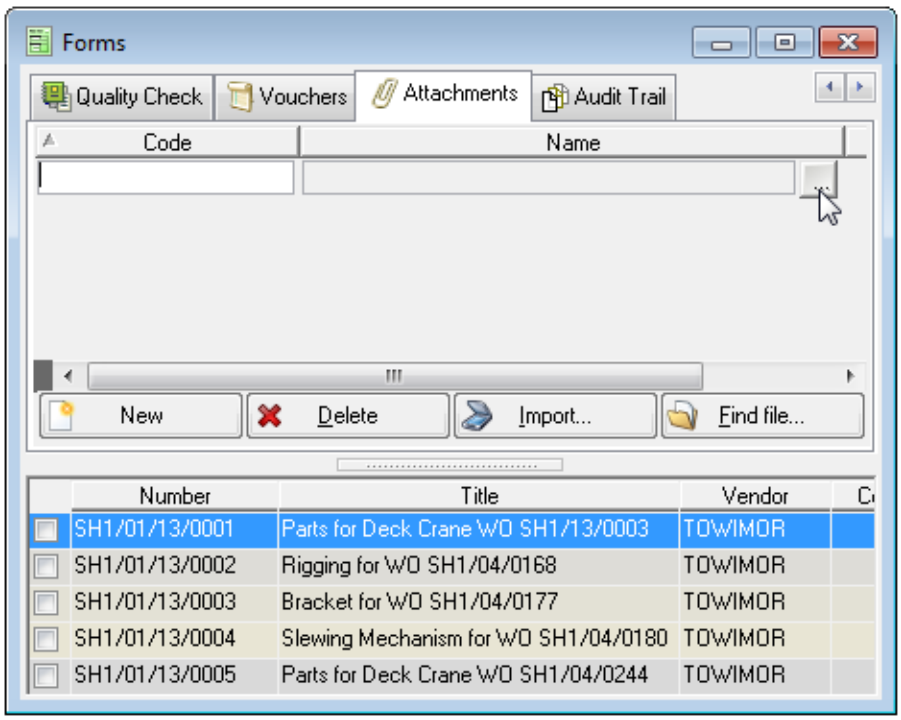
There are also two parameters which govern the size of attachment files and how to handle oversized ones.

- **'Attachments Maximum Size'**. Restricts the maximum size (kb) for all attachments. No value means no restrictions apply.
- **'Attachments Oversize Action'**. Set to WARN, if a user tries to add an attachment which exceeds the size allowed by the parameter 'Attachments Maximum Size', AMOS warns that the attachment exceeds the maximum and allows the user to choose to proceed or not. Set to PREVENT, if a user tries to add an oversize attachment AMOS will not allow it.

5.4.1 Adding Attachment References To Records In AMOS

To add a registered attachment reference to a record in AMOS:

1. Open a window's Attachments tab.
2. Click the **New** button.
3. Use the lookup to select an attachment from the attachment references library:



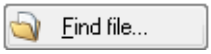
4. Click **OK**.
5. **Save** the window.

Remove the attachment by selecting it and clicking **Delete**. Open it up by selecting it and clicking **View**.

5.4.2 Adding Attachments - The Find File Button

To locate a file in your system and add it to an Attachments tab[1]:

1. Open a window's Attachments tab.
2. Click the **Find File** button:

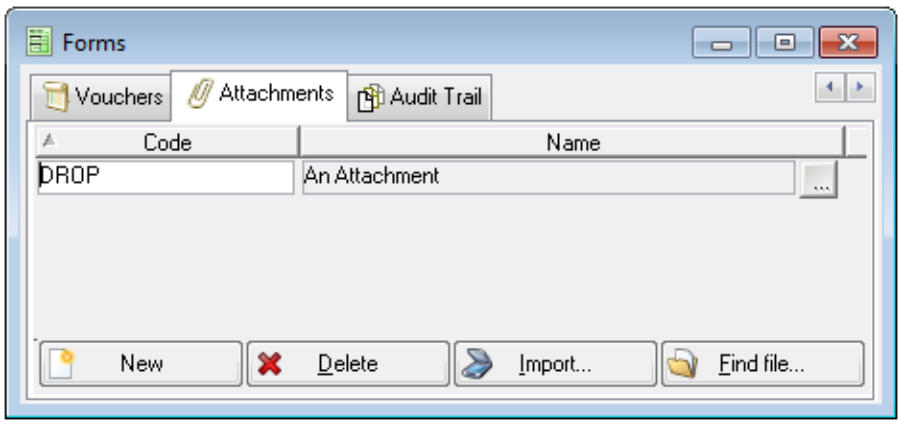
   

3. Browse to and select the file. Click **Open** to attach it.

   AMOS may ask if the file should be stored in the database or not[2].

   If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[3].

4. The file is added:

5. **Save** the window.

Remove the attachment by selecting it and clicking **Delete**. Open it up by selecting it and clicking **View**.

5.4.3 Adding Attachments - Drag And Drop

To drag and drop a file in your system onto an Attachments tab[4]:

1. Open a window's Attachments tab.
2. Find the file in your system. Click on it and drag it to the tab.
3. Drop it.

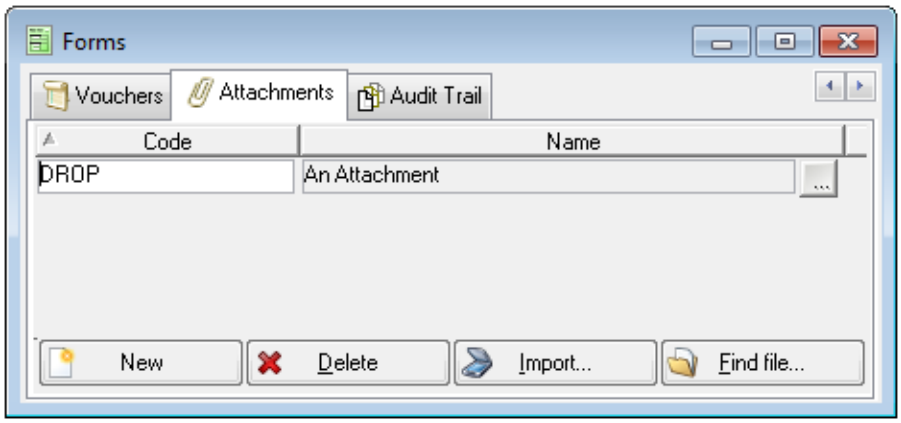
   AMOS may ask if the file should be stored in the database or not[5].

---

[1]For windows without an Attachments tab, the same functionality applies in the dedicated window opened at Options > View Attachments.
[2]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments Store in Database'.
[3]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments File Operation'.
[4]For windows without an Attachments tab, the same functionality applies in the dedicated window opened at Options > View Attachments.
[5]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments Store in Database'.

If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[1].

4. The file is added:



5. **Save** the window.

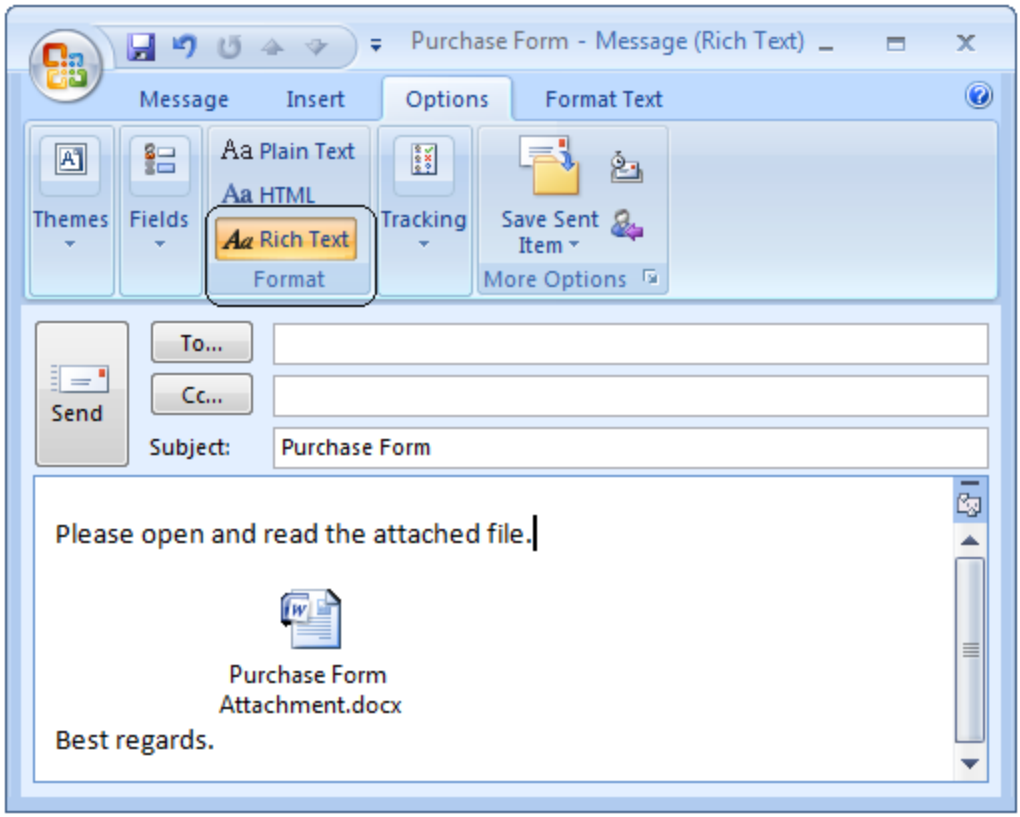
Remove the attachment by selecting it and clicking **Delete**. Open it up by selecting it and clicking **View**.

Dragging and Dropping from Outlook

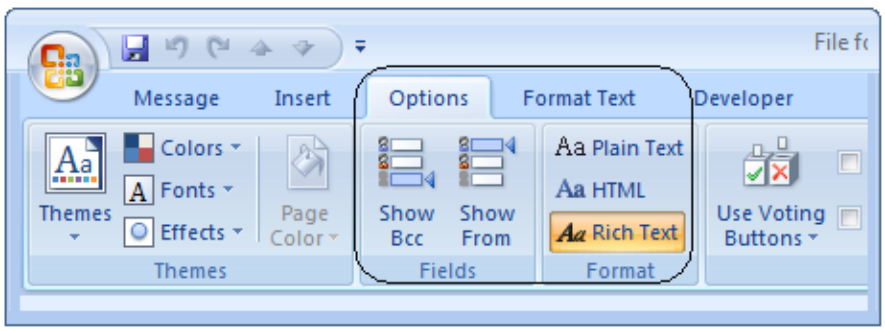
To drag and drop an attachment file from Outlook:

1. Open a window's Attachments tab.
2. Open Outlook and double-click on an email to open it in a new window.
3. The opened email message must be in RTF view mode, which means that the attachment is contained in the text of the mail:

[1]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments File Operation'.



If the message is not already displayed in RTF format as above, change it by selecting **Rich Text** from the **Options** tab on the email message:



4. Drag and drop the attachment icon into the Attachments tab in AMOS. Hold the **CTRL** key as you drag if you want to *copy* the file; otherwise, it will be removed from the email.

TIP

In Outlook the message format can only be changed on outgoing emails. To change the format on a received message, click **Forward** on the mail. When the message opens in a new window for forwarding, select **Rich Text** from the Options tab and then drag and drop the attachment. Close the message dialog without saving it.

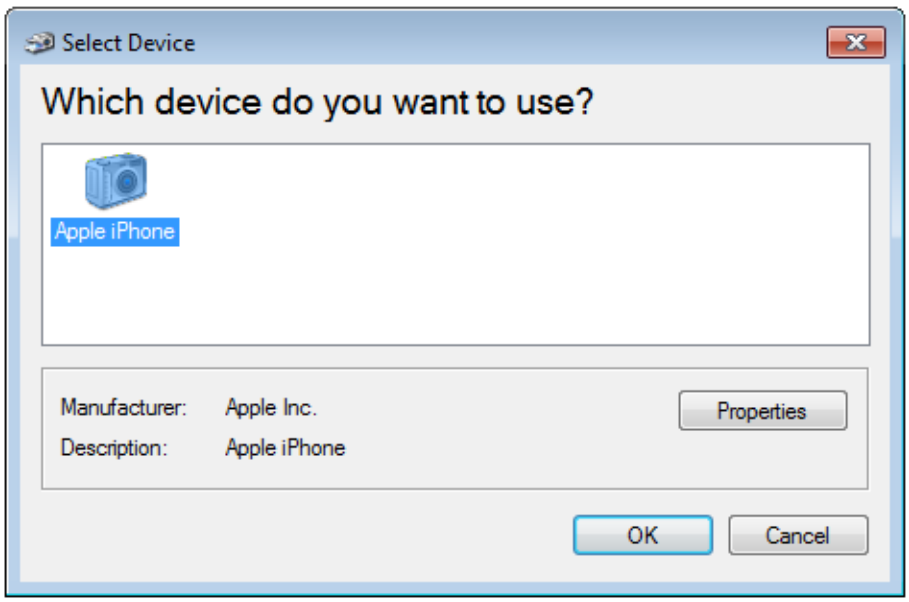
5.4.4 Adding Attachments - Importing Images

Users with edit access to the relevant window can import images into the Attachments tab[1], directly from their camera, phone, scanner and other similar devices:

1. Attach a supported device to your computer. Let Windows recognise the device as usual.
2. Open an Attachments tab or window. Click the **Import** button:

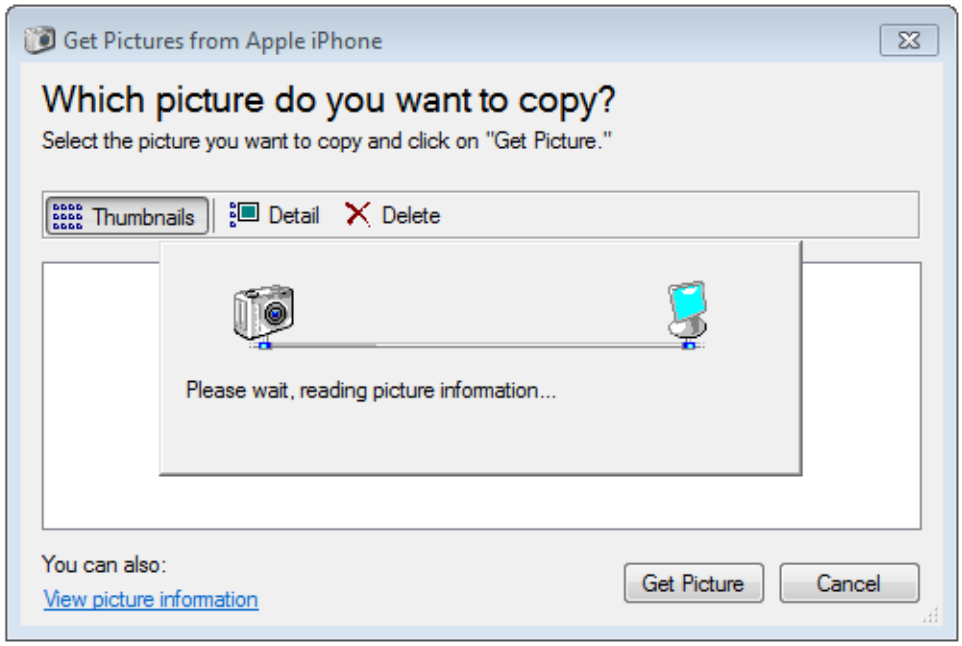


3. A standard Windows dialog appears[2].

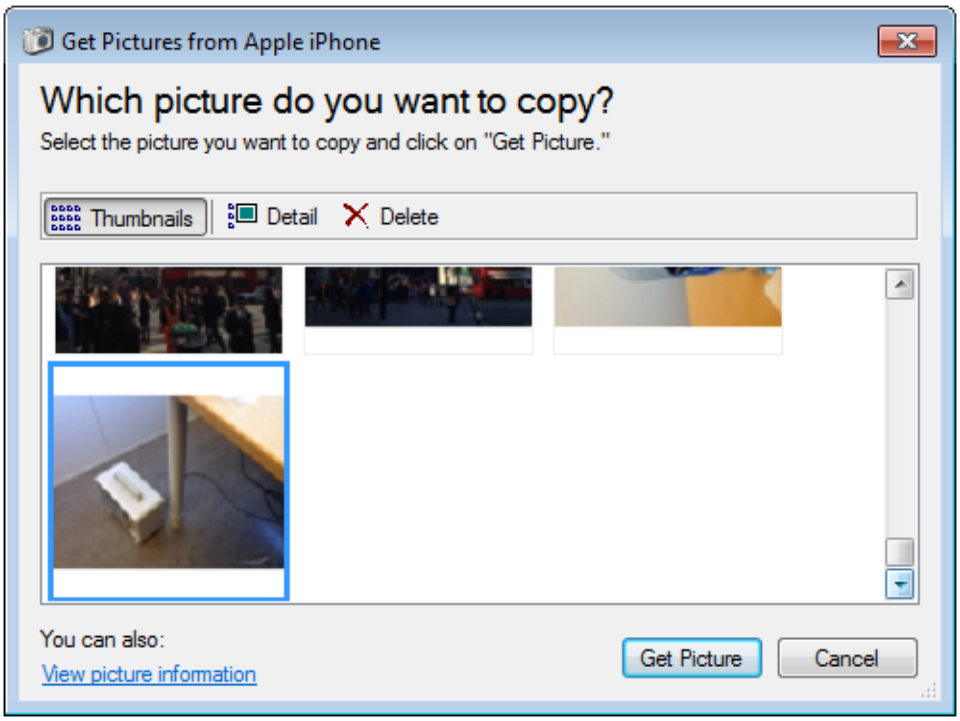


4. Select a device and click **OK**:

[1]For windows without an Attachments tab, the same functionality applies in the dedicated window opened at Options > View Attachments.
[2]If no device is attached or recognized, you will receive the message that an image could not be acquired.



5. A new dialog opens showing the images on the device.
6. Select one or more images to import and click **Get Picture**:



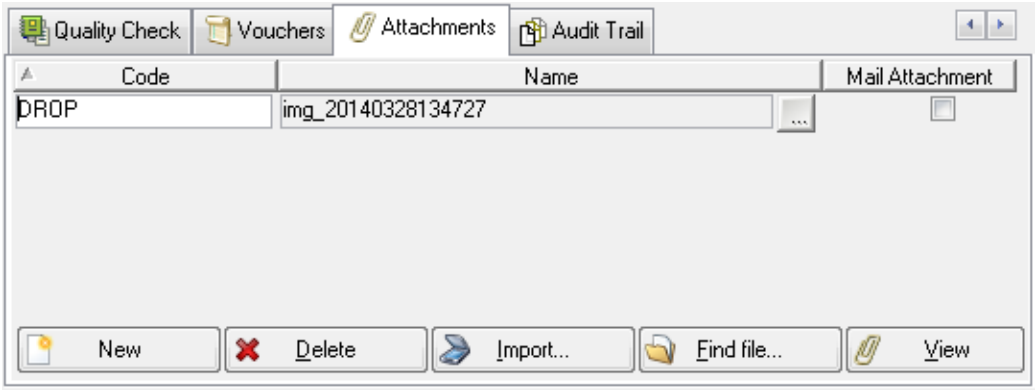
- images are imported in .png format.
- quality is reduced to save space.

  AMOS may ask if the file should be stored in the database or not[1].

[1]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments Store in Database'.

If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[1].

7. The image is added:



8. **Save** the window.

Remove the attachment by selecting it and clicking **Delete**. Open it up by selecting it and clicking **View**.

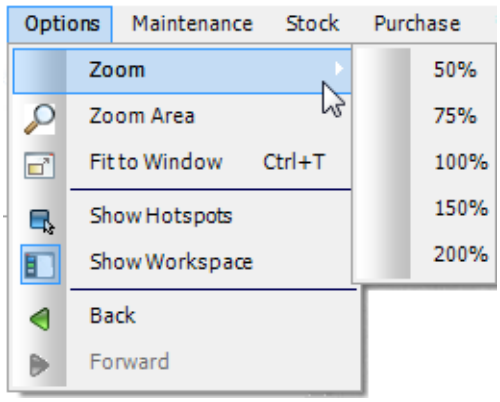
5.5 Viewing Attachments

To view an attachment on the screen:

1. Open an Attachments tab and select a file.
2. Click the **View Attachment** button. The attachment appears in a new window.

There are three ways to zoom in on an attachment detail:

- Use the cursor to mark the part of the attachment to zoom on. Then click the **Zoom Area** button. Zoom back out by clicking the **Fit to Window** button.
- Mark an area zoom on and go to **Options > Zoom Area**. Or go to **Options > Zoom** or **> Fit to Window** to zoom in and out:



- Right click on the attachment. Select the same options there.

To move around in a zoomed attachment use the vertical and horizontal scroll bars.

[1]Depends on the setting of the system parameter Tools > Configuration > Parameters > Options > General > Attachments > 'Attachments File Operation'.

5.6 Hotspots On Attachments

A hotspot is a user-defined interactive area on an attachment (like a button or some text) which when clicked opens a new window containing more information or another image to provide more details about relevant parts of the main attachment.

Using hotspots, you can:

- Link one attachment to another to provide a different or more detailed view of a particular area.
- Open another window (and specific record) in AMOS to find relevant information about the entry to which the attachment is connected: Component Types, Components, Stock Types, Stock Items and Quality Procedures.
- Open a window or a function within AMOS:

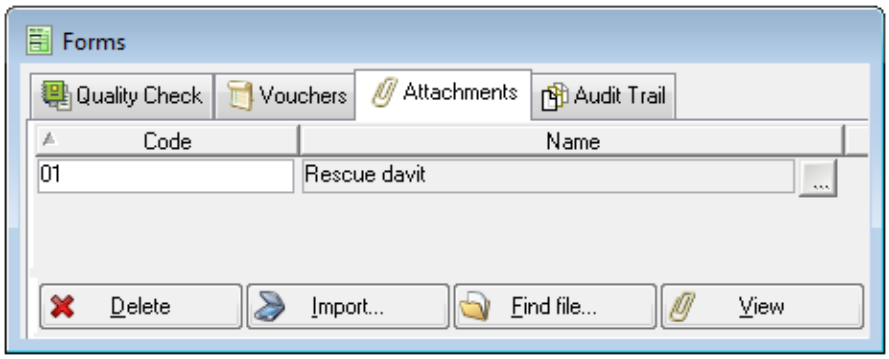
  Window: <window name>:amos:sheet

  Function: <function name>:amos:response

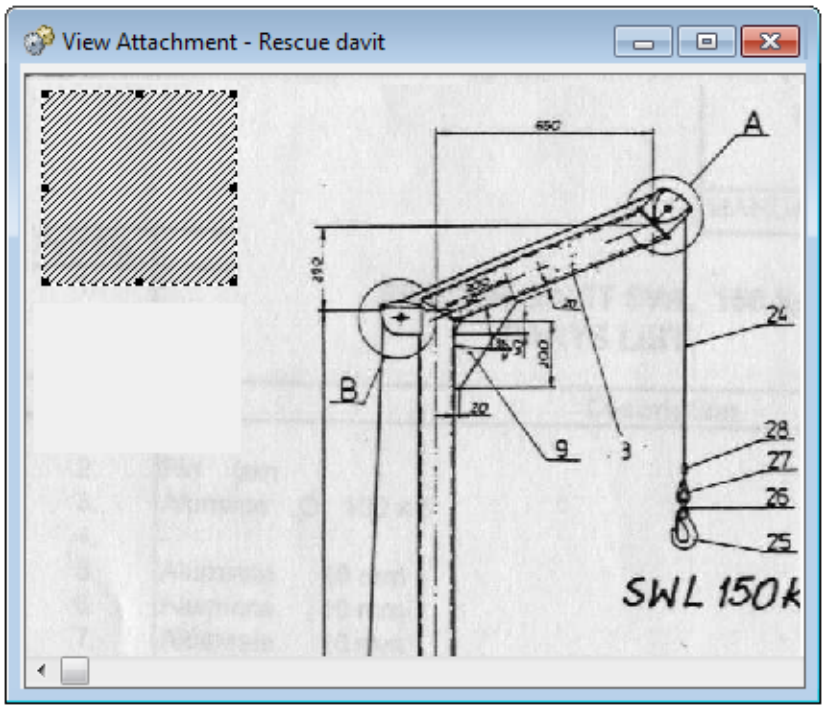
5.6.1 Defining A New Hotspot

You can define hotspots on attachments linked to attachment sources defined with service type 'internal' only. To define a hotspot:

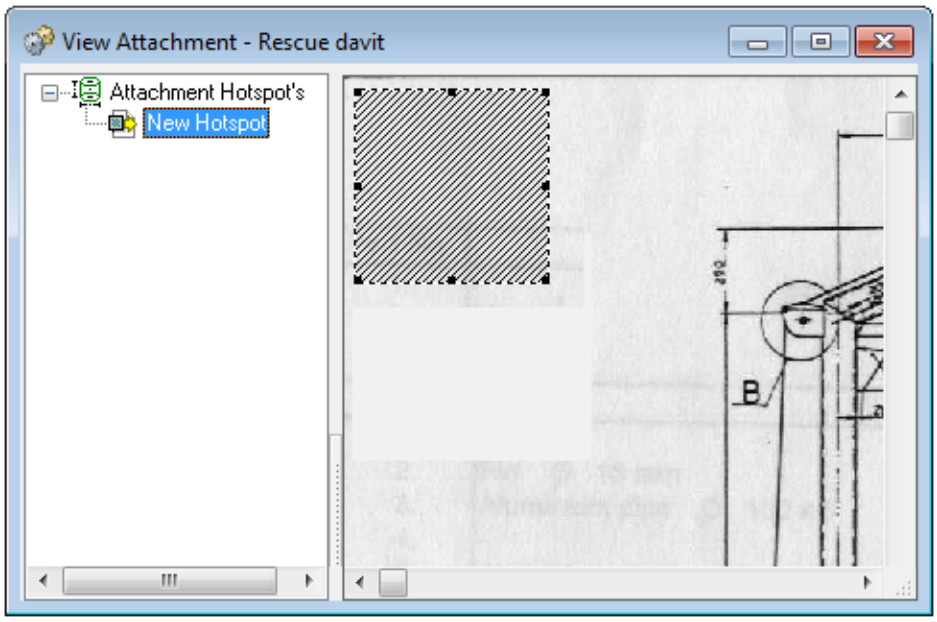
1. Open an Attachments tab in AMOS and select an attachment:



2. Click **View** to open it up.
3. Click the **New** button on the toolbar and a new hotspot appears as a shaded area in the top left corner of the attachment window:

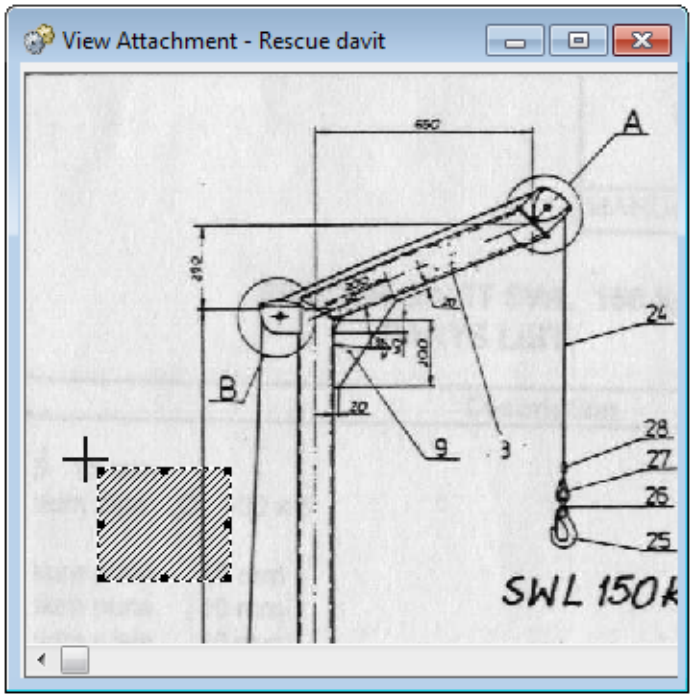


Click the **Show Workspace** button at any time to open a panel on the left side listing the new and any existing hotspots:

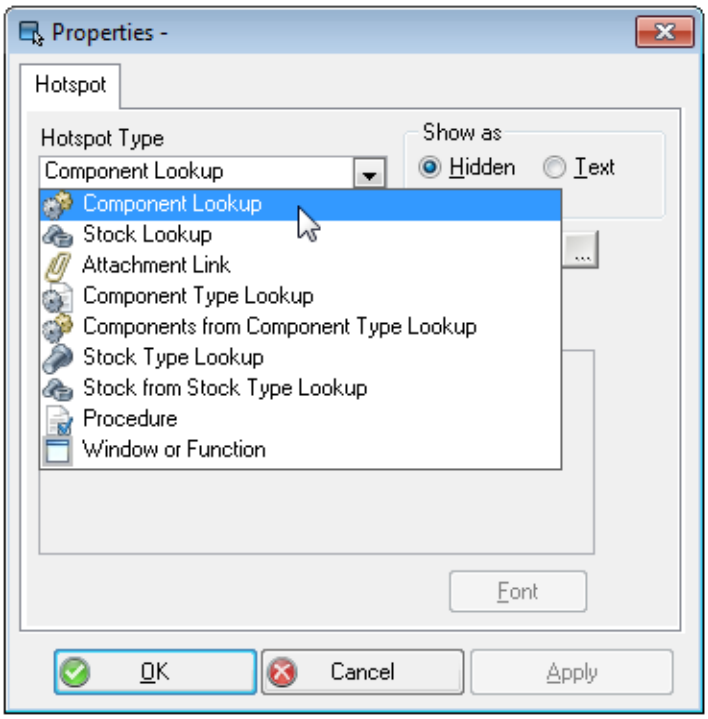


4. Drag the new hotspot to a location on the attachment.

   Once in place, you can resize it by dragging the handles on the hotspot edges:



5. **Save** the hotpot.
6. Right-click on the hotspot and choose **Properties**.
7. Select a **Hotspot Type** from the drop-down list:

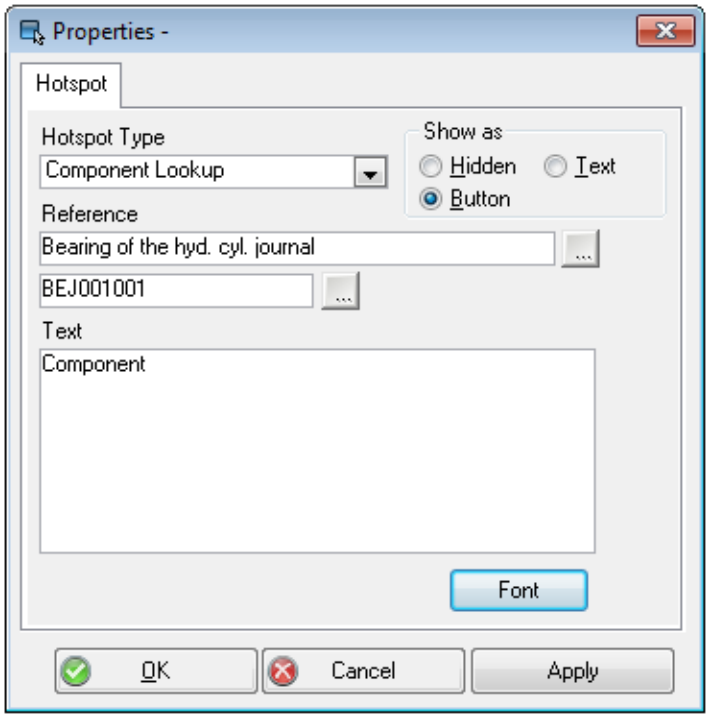


8. Select to show the hotspot at a **Button** or **Text**. You can also select to leave the hotspot **Hidden**. Hidden hotspots are invisible until you hover over it and the cursor turns into a pointing hand.

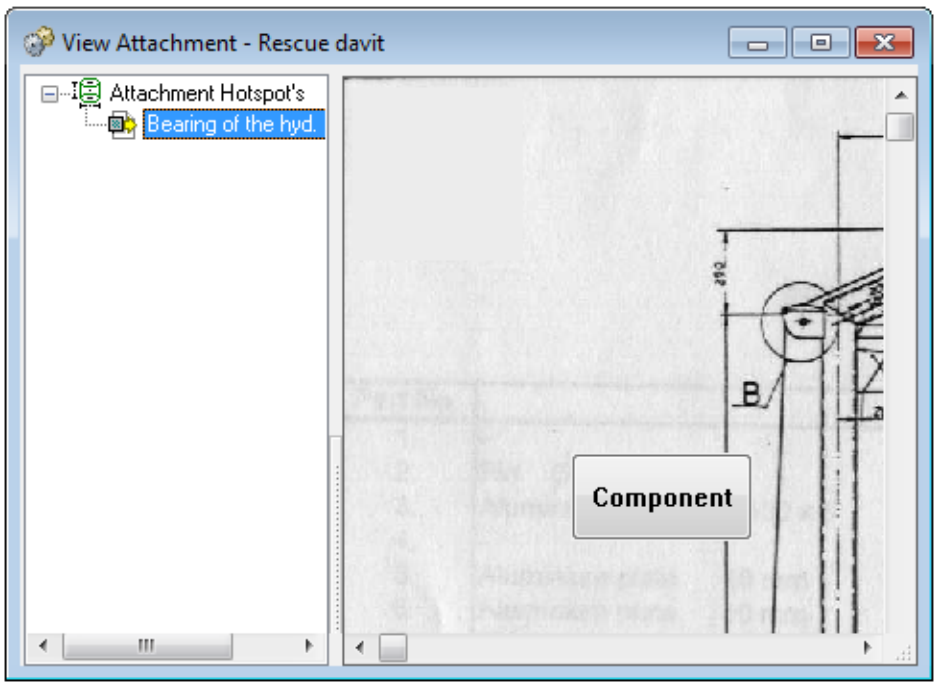
   For text, enter the text which will be the hotspot.

   For a button, enter text to label it.

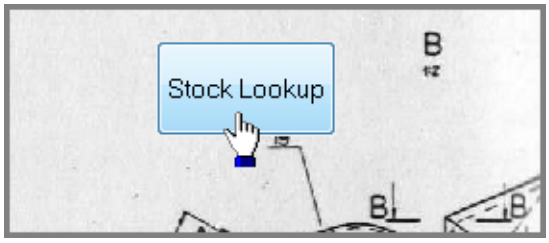
9. Lookup the **Reference** - the attachment, window, or record in a window, that will be opened when a user clicks on this hotspot:



10. Click **OK** to return to the attachment.
11. Click **Show Hotspots** to see the hotspot as it will now appear:



You can create a chain of hotspots connecting as many attachments/windows as you like. When a user opens the attachment and hovers over a hotspot, the hotspot is activated and clicking it will open the linked attachment/window:

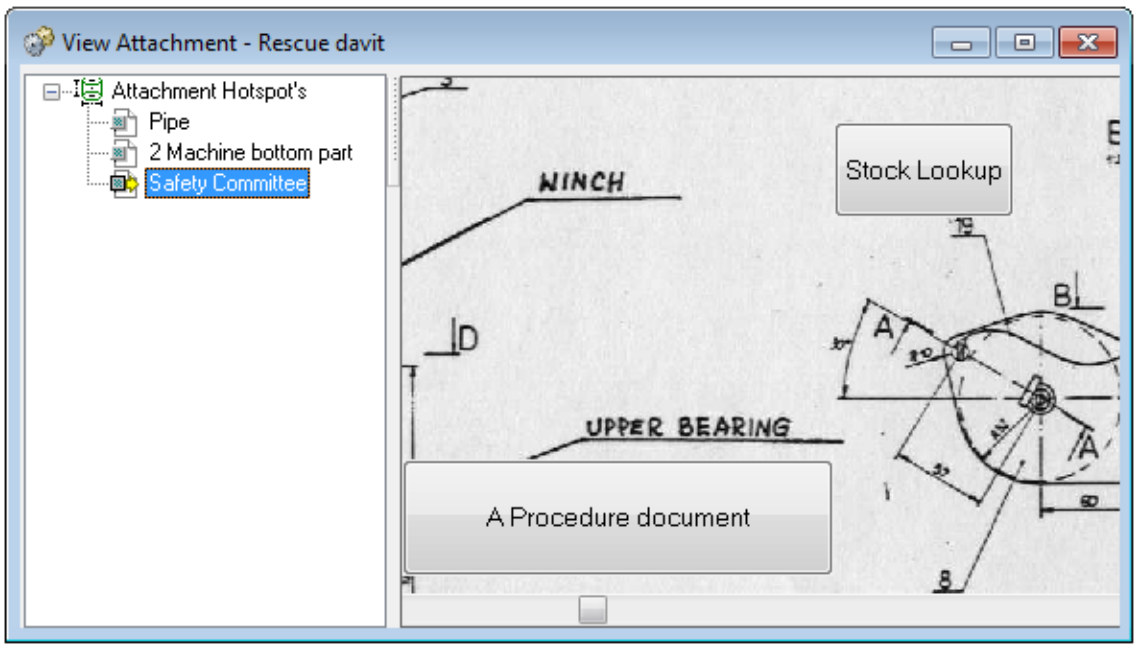


The system parameter 'Open Attachment In New Window' controls what happens when a hotspot for another attachment is clicked on. Set to FALSE, the next attachment replaces the current one in the same window. Set to TRUE, the new attachment will be displayed in a new window.

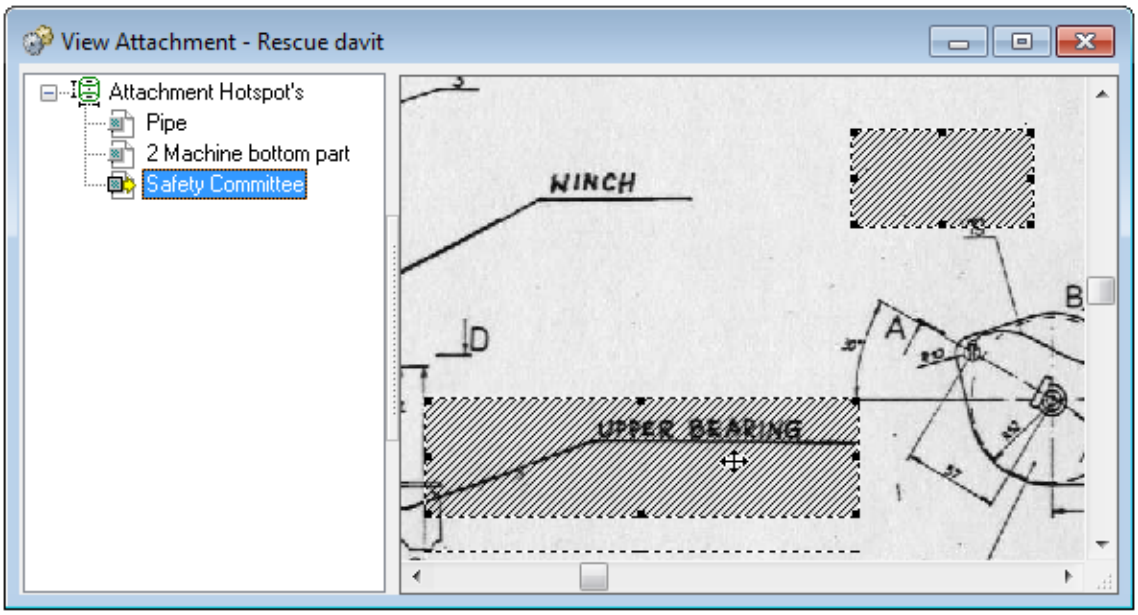
Click the **Forward** and **Back** buttons to browse between opened attachments.

5.6.2 The Attachment Workspace

An attachment can contain more than one hotspot. To keep track of the hotspots and their links, click the **Show Workspace** button in the toolbar or go to **Options > Show Workspace** to open a list on the left side:



Click **Show Hotspots** or go to **Options > Show Hotspots** to toggle between showing the hotspots as they appear, and showing them as shaded areas for resizing or moving:



Hovering over one highlights its name in the list on the left side.

CHAPTER 6 Account Transactions

Accounting functionality in AMOS is activated by a separate license, and provides a record of each account transaction, its type (credit or debit), the cost centre, account code, and all associated transaction data.

Financial transactions are logged in the Account Transactions window as they occur. Transactions which users perform in the following areas of AMOS are registered as account transactions:

- Vouchers
- Transport Documents
- Stock Transactions - Purchase Order Receipt, In/Out of Stock, Stock Control
- Transfer Document Transfer/Receipt
- Work Order Reporting

Once a transaction is listed in the window you can alter it if it is unlocked. With the correct level of access control, you can generate manual transactions here as well, to correct locked transactions that are incorrect.

6.1 Setting Up Account Transactions

The AMOS Business Suite Accounting module provides the ability to tie every transaction that takes place to a particular account code, which in turn can be assigned to cost centres.

If your system license includes the Accounting module, to set up and use account transactions:

1. Define your cost centres and grant access rights. See section 6.1.1.
2. Define account code categories and account codes. See section 6.1.2.
3. Link the account codes to cost centres. section 6.1.3.
4. Track account transactions. See section 6.2.

6.1.1 Cost Centres

Cost centres are separate financial areas that you register expenses against and record where resources are used. A cost centre can be a department, a collection of departments, a project, a machine or any other unit/collection of units that your company wants to record transactions

and costs against.

To create a new cost centre:

1. Go to **Tools > Configuration > Accounting > Cost Centres**.
2. Click **New**.
3. Enter a **Code** and **Name**.
4. Select a **Parent** cost centre, if any. This creates a hierarchy in your cost centres.
5. Flag **Has Stock** if the cost centre can be applied to stock transactions: that is, transactions involving a warehouse or storeroom.
6. The **Active** checkbox is for temporary cost centres such as a project and can be unchecked once the cost centre is no longer required. Flag it to activate your new cost centre now.
7. **Save** the cost centre.

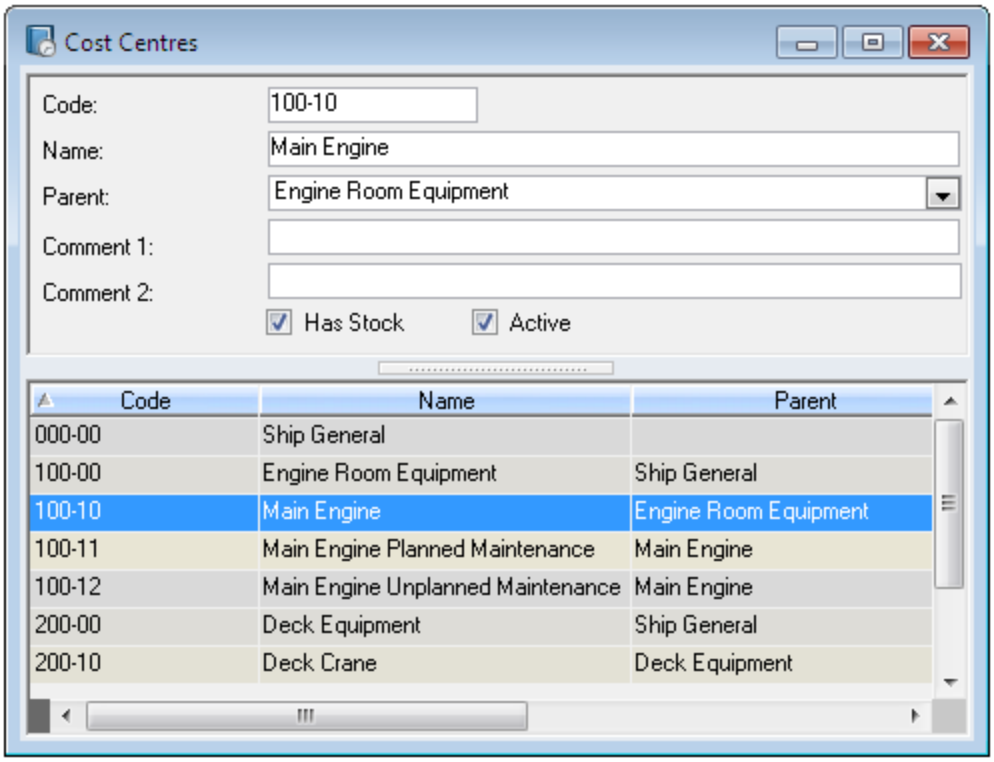


Figure 68 The Cost Centres window

6.1.1.1 Cost Centre Access

To set access to cost centres:

1. Go to **Tools > Configuration > Access Control > Groups**.
2. Select a user group.
3. Go to **Options > Cost Centre Access**[1].
4. Click **New** and then use the lookup to select a cost centre.
5. **Save** and exit the window.

[1]The option is only available when accounting is active in the system.

Cost centres for each group must be specifically identified for that group to use it. If you do not attach a particular cost centre to a group, users in that group will not have access to it.

6.1.2 Account Codes

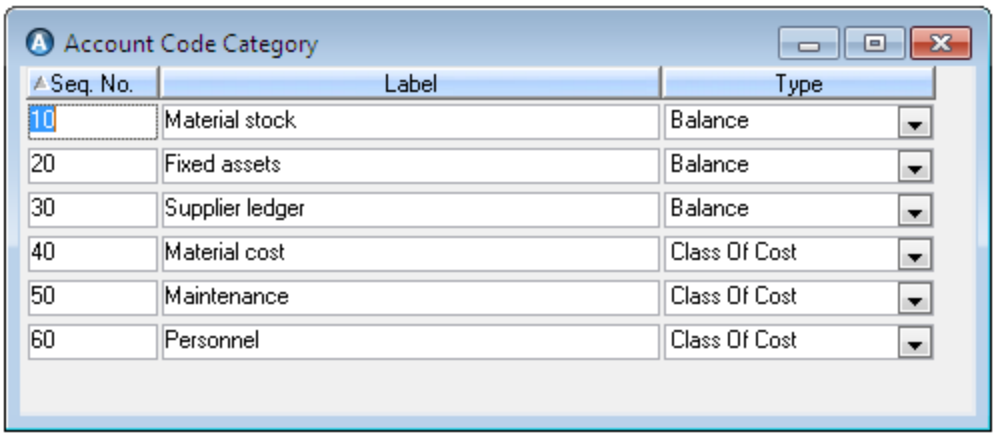
When you use the accounting module, all account transactions are stamped with an account code as they occur. Account codes are the fundamental unit for recording the types of expenditures and events. They can define anything from manpower to materials, assets, etc.

6.1.2.1 Account Code Categories

Account code categories are for grouping similar account codes together. To add a category to the register:

1. Go to **Tools > Configuration > Accounting > Account Code Categories**.
2. Click **New**.
3. Enter a numerical value in the **Sequence** field and a name for the category in the **Label** field.
4. There are three account **Types** to choose from:

- **Balance** - Balance category accounts accumulate value: for example stock accounts, capital value accounts, fixed asset accounts, etc. order forms must have account codes registered in the balance category.
- **Class of Cost** - Class of Cost category accounts record expenses. Work orders must have account codes registered in the Class of Cost category.
- **Generic** - Generic category accounts have no restrictions on how they can be used. They exist mainly for backwards compatibility with earlier versions of AMOS which did not have account code categories; however since they do not have the restrictions places on the other two account type categories, they can be used broadly.



5. **Save** the register.

6.1.2.2 Account Codes Register

To add account codes to the register:

1. Go to **File > Open Register > General > Account Codes**.
2. Select an **Account Code Category**.
3. Click **New**.
4. Enter a **Code** and **Description**.

5. Flag 'Active' to make sure the code is available for use on purchase forms.
6. **Save** the register.

To create a new account code:

1. Select an **Account Code Category**.
2. Click the **New** button on the toolbar.
3. Enter a **Code** and **Description**.
4. Activate the Account Code by checking the **Active** checkbox. This can be unchecked at any time to deactivate the code.

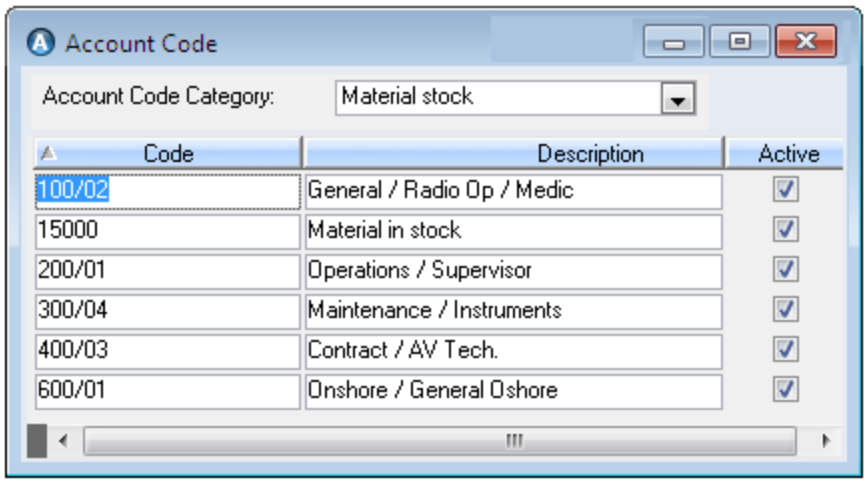


Figure 69 The Account Code register

5. **Save** the code.

6.1.3 Linking Account Codes To Cost Centres

Once you have set up cost centres and created account codes, define which account codes should be available for each cost centre. When performing transactions, only account codes linked to the selected cost centre will be available.

To link an account code to a cost centre:

1. Go to **Tools > Configuration > Accounting > Cost Centres**.
2. Select a cost centre and go to **Options > Accounts**. The Cost Centre Accounts window opens.
3. Click the lookup button to choose an **Account Code**.
4. Click **New** to add another account code to the same cost centre.
5. **Save** and close the window to return to the Cost Centres window.

You can also connect account codes to budget codes in the same window, so that the expenses are accrued to the Budgeting module as well. See the *AMOS M&P User Guide* about Budgeting and Budget Codes.

6.2 Tracking Account Transactions

Go to **Tools > Account Transactions** to open the Account Transactions window. You can filter for individual transactions; all transactions recorded against a **Cost Centre** or **Account Code**; or all transactions between two **Transaction Dates**.

Automatically recorded transactions are listed in the bottom of the window: click **New** to create a manual account transaction, connecting it to various forms or documents.

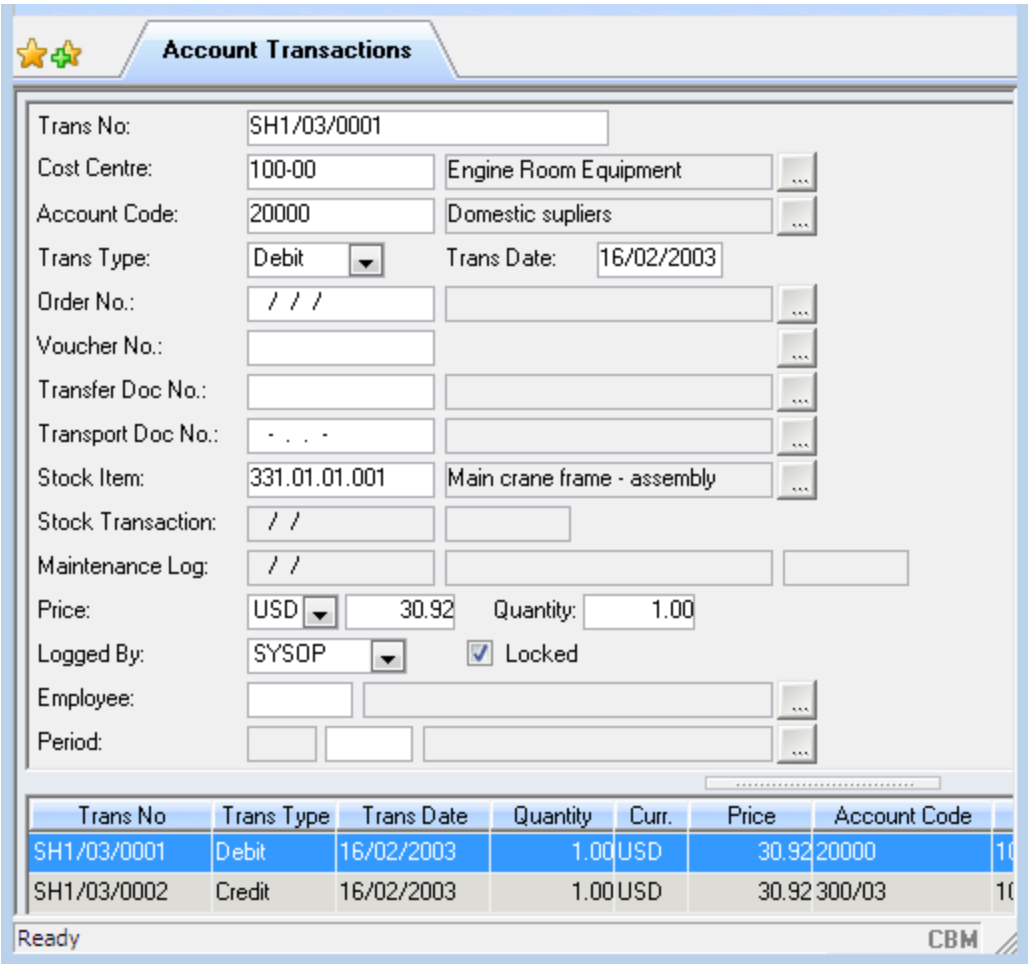


Figure 70 The Account Transactions window

NOTE: If **On Board Accounting** is activated in your system, then at the bottom of this window you can include **Employee** and **Period** information in the account transactions.

CHAPTER 7 Audit Trails

Placing an audit trail on one or more columns in a table in AMOS Business Suite lets you track every change made in the selected window/field(s): the original value, the new value, the date of the change made, the operation performed on that record (i.e. insertion, deletion or update), and the user ID of the person who made the modifications.

To set up and use an audit trail:

1. Configure the audit trail. See section 7.2.

   (Optional) Set the audit trail to prompt users for reasons whenever they make a change. See section 7.2.1.

   (Optional) Some Bureau Veritas reports require certain audit trail columns and triggers in place, in order to run successfully. See section 7.2.2.
2. Generate triggers to activate the new audit trail. See section 7.3.
3. View the results in the Audit Trail Log. See section 7.5.

It is also possible to record all login activities on the system in the Login Audit Log. See section 7.6.

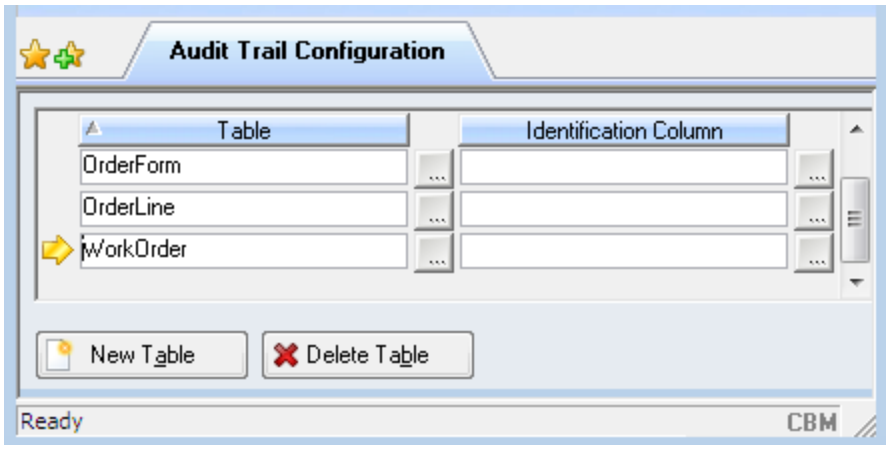
NOTE: SpecTec recommends that as general procedure, audit trails are configured on each installation's database. However, it is also possible to configure an audit trail at an Office installation and then synchronise the configuration with Vessel installations - consult your local SpecTec office about setting up this procedure. In such a case the vessels must be running the same version of AMOS as the office is; or, only using columns which are present in both versions. Once the configuration is present in all the vessels, on the vessel databases call the stored procedure amos.p_ enableaudittrail (1) and the stored procedure amos.CreateAuditTrailTriggers(1); if you are using AMOS Replication for synchronization these procedure calls can be managed using the SQLCommand table.

7.2 Configuring An Audit Trail

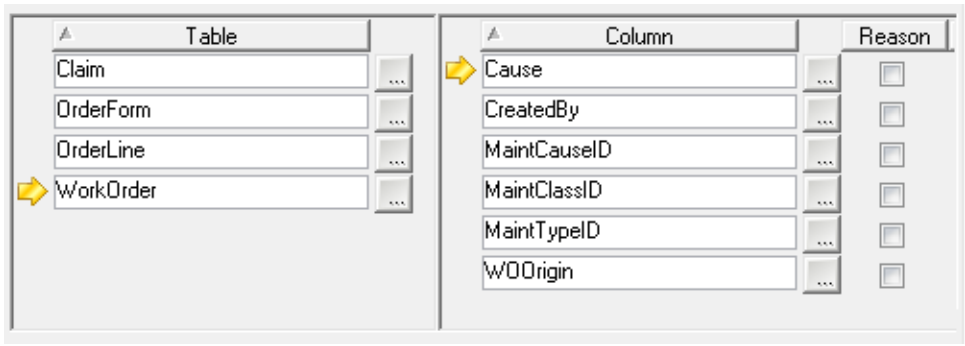
To configure an audit trail, decide which tables/columns[1] you want to audit. Then:

[1] To put an audit trail on a column, the column must exist in both the office and vessel installation.

1. Go to **Tools > Configuration > Audit Trail Configuration**[1].
2. Click **New Table** at the bottom of the 'Table' section.
3. Select a table to place an audit trail on:



4. Keep the table selected and click the **New Column** button.
5. Lookup a column you want to audit in the selected table.
6. Click **New Column**again to continue adding as many columns as necessary:



7. The listed column(s) only apply to the table currently selected on the left.
8. **Save** the configuration.

7.2.1 Setting An Audit Trail To Require Reasons For Changes

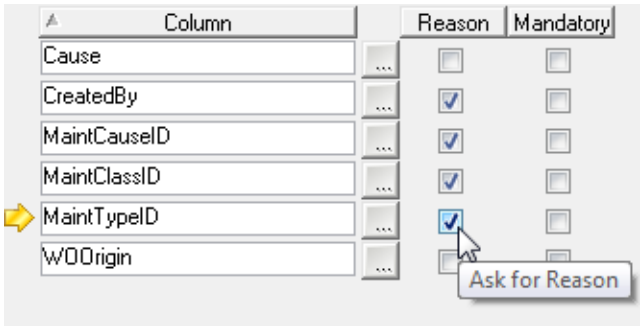
You can set an audit trail to require a reason when a user makes a change to an audited field. In such a case AMOS will prompt the user to provide a reason for the change upon saving the window.

Reasons will be saved in the Audit Trail Log, and the Audit Trail tab on the audited window if applicable. Reasons can be free-text or selected from a predefined list of reason codes.

To require reasons on an audit trail:

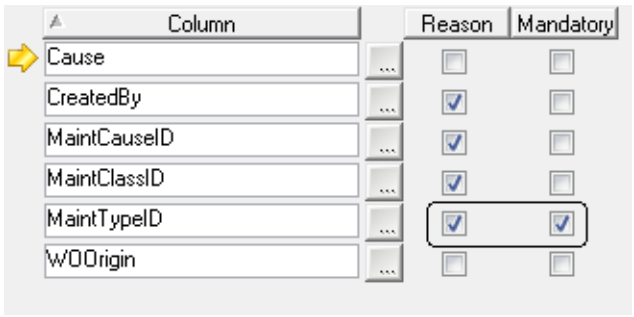
1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Click next to a table on the left side.
3. Flag the **Reason** checkbox next to any column in the table's list which you want AMOS to prompt for a change reason on.

[1]You can only open this window if the > General > Database > 'Compatible to Version' parameter is set to 'Current' or to 8.5.00 or greater.



When a user makes any change to one of these columns, upon saving the window he/she will be prompted with the Audit Trail Reason dialog to provide a free-text reason. However, he/she can bypass the dialog without actually providing a reason.

4. To prevent users from bypassing the Reason dialog on a column flag the **Mandatory** checkbox:



Now, when a user makes a change to such a column AMOS will prevent bypassing the dialog and saving the window, until the user provides a reason.

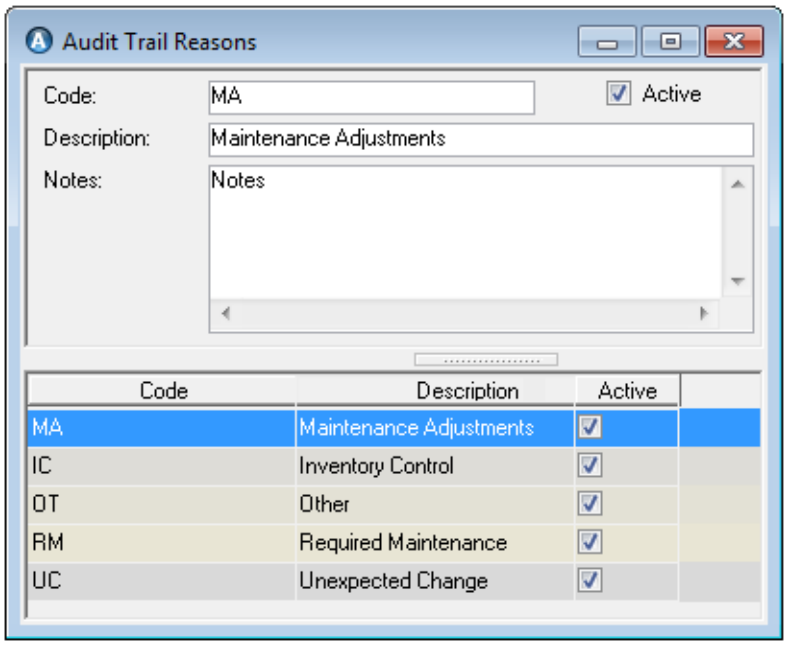
5. **Save** the configuration.

7.2.1.1 Using Reason Codes

You can configure an audit trail to accept predefined 'reason codes' in addition to or instead of free-text reasons.

Define a list of available reason codes:

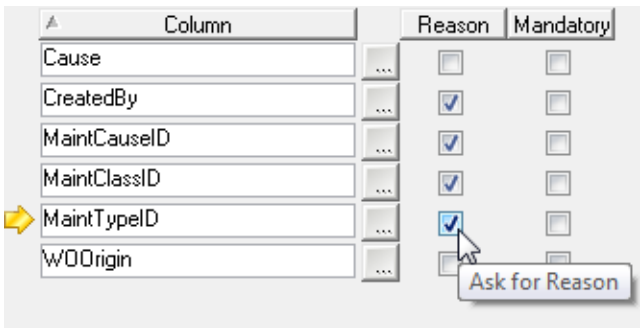
1. Go to **File > Open Register > General > Audit Trail Reason**.
2. Click **New**.
3. Add a **Code**and **Description**, like 'Maintenance Adjustments' or 'Inventory Control'.
4. Add an explanation in the **Notes**area.
5. Flag 'Active' to include the reason code in the Audit Trail Configuration window and lookup lists.



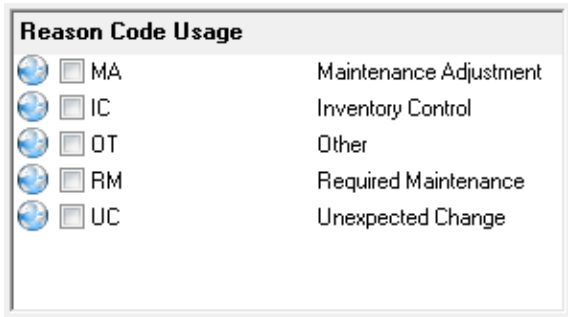
6. **Save** and exit the register.

Assign reason codes to columns in audit trail configurations:

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Select an audit trail configuration.
3. Flag the **Reason** checkbox on any column(s):



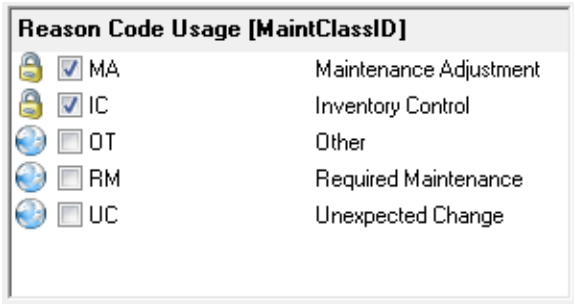
Active reason codes appear in the right side of the window:



Flag any which apply:

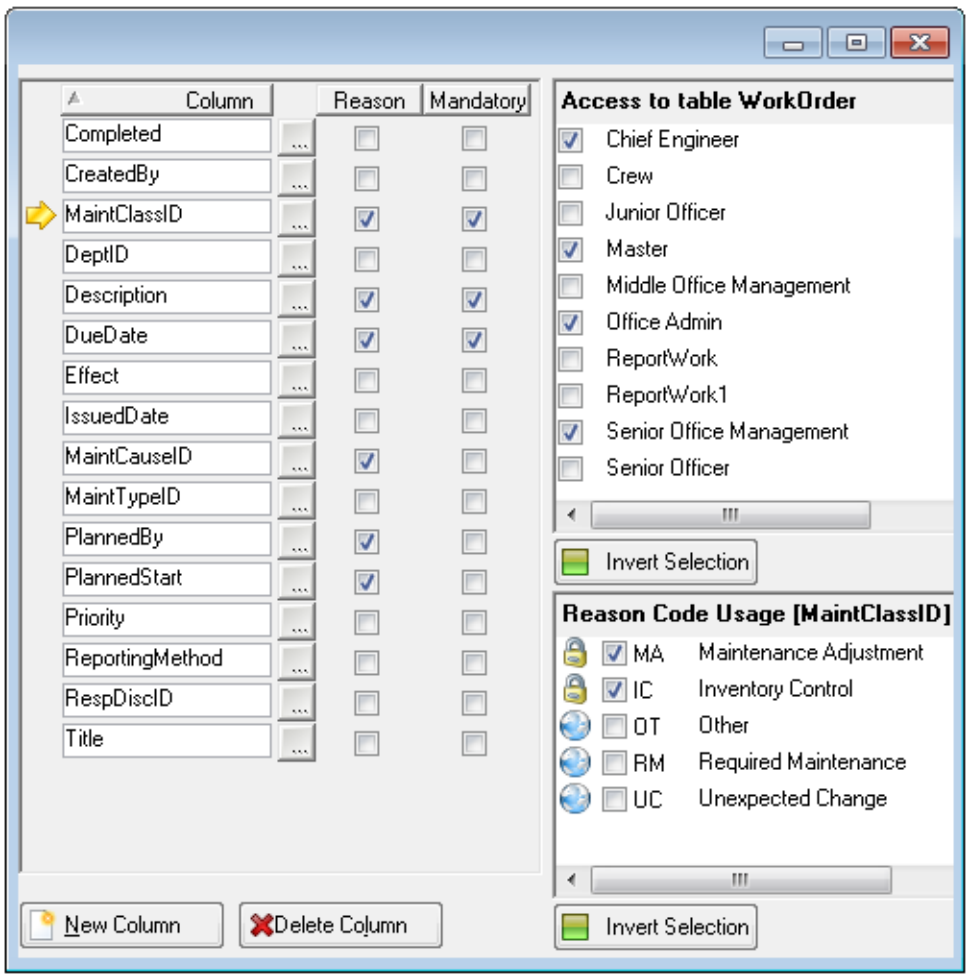
- Once a code has been flagged for a column, it will *only* be available on that column and on any other column where it is flagged. The icon beside flagged codes changes to a padlock when you **Save**.

- A reason code which is not flagged on *any* column in the entire configuration will be available on every audited field where **Reason** is flagged. The icon beside unflagged codes remains the same.



When a user changes a flagged field with reason code(s) available, he/she can select a code or enter a free-text reason.

4. To prevent users from bypassing the Reason dialog, check the **Mandatory** box next to the column.
5. **Save** the configuration.



7. **Save** the configuration.

> **TIP**
>
> A reason code which is not flagged on *any* column in the entire configuration will be available on every audited field where **Reason** is flagged. To prevent unused reason codes from showing up on every audited field in the configuration, add an unused column you do not need to audit, and flag all the remaining codes there.

7.2.2 Bureau Veritas - Audit Trail Reports

Provided you have the correct access rights, the Options menu on the Audit Trail Configuration window contains one other item: **Add Bureau Veritas columns**. The Bureau Veritas reports listed below require certain audit trail columns and triggers in place, in order to run successfully:

Component Based System

- Class Code Changes - Components
- Due Date Changes - Components
- Planned job Changes - Components

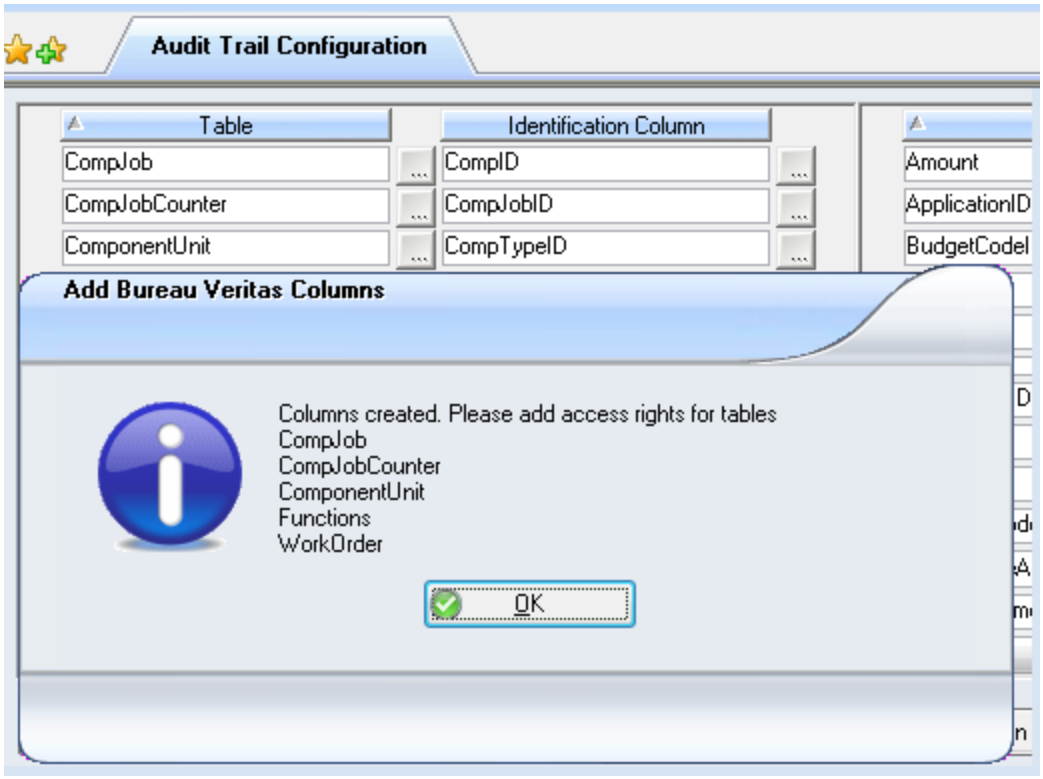
Function Based System

- Class Code and Criticality Changes - Functions
- Due Date Changes - Functions
- Planned job Changes - Functions

If a user tries to execute any of these reports before the audit trails are in place, the reports will not run.

To ensure that all the necessary columns are added correctly:

1. Go to **Options > Add Bureau Veritas columns**.
2. Click **OK** in the dialog, and the appropriate tables and columns are added automatically.



3. Flag the user groups on the right side of the window, who should access each table in the list.
4. **Save** the configuration.
5. Enable it by generating the triggers.

The relevant reports will now run correctly.

If the audit trail for these columns has not been set the first time a user attempts to run the relevant reports, AMOS will give the user the option to configure the audit trail for the columns immediately. The Audit Trail Configuration window will open and the columns will be inserted automatically. The user can assign group access and generate the triggers, before returning to the reports. If the user does not have access to this window, the reports will not be available.

7.2.3 Assigning Access To The Audit Trail Log

The results of any audit trail you configure will only be available in the Audit Trail Log to users with the necessary access:

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Choose a table with an audit trail configuration in place.
3. Flag user groups on the right side of the window to allow access.
4. **Save** the settings. Users belonging to flagged groups will be able to select the table in the list for the Audit Trail Log viewer.

7.3 Enabling An Audit Trail Configuration

When your audit trail configuration is final and saved, generating audit trail triggers activates it:

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Select the table the configuration is for.

3. Go to **Options > Generate Triggers**.
4. AMOS asks if you want to create triggers. Click **Yes**.
5. Exit the window.

If you do not do generate triggers, you will be prompted to do so on closing the window. You must generate the triggers to activate a new or changed audit trail for use.

Once configured and enabled, users can view the results of an audit trail in the Audit Trail Log[1], or in the Audit Trail tab available on some windows.

7.4 Providing Change Reasons On Audited Fields

When an audit trail is configured to prompt for a reason when a user changes certain fields, the user cannot save the window in question until providing a reason for the change(s).

After changing/updating one or more fields requiring a reason, in an audited window:

1. Click **Save**. The Audit Trail Reason dialog opens.
2. The audited fields requiring a reason are listed in the bottom:

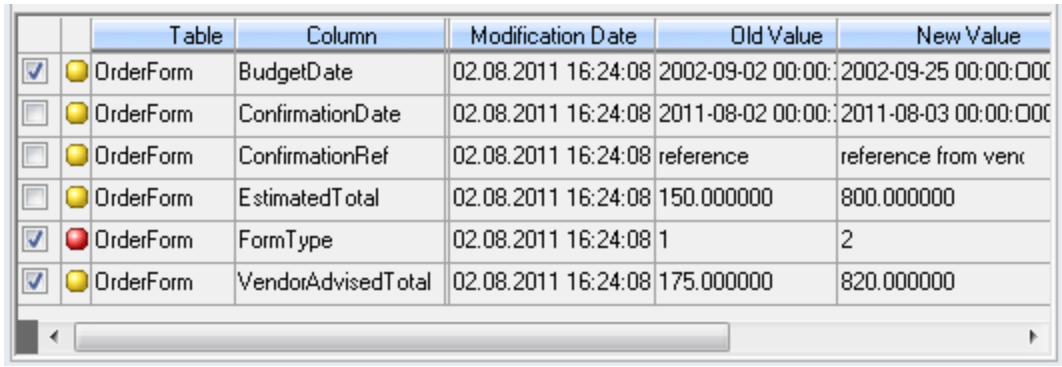
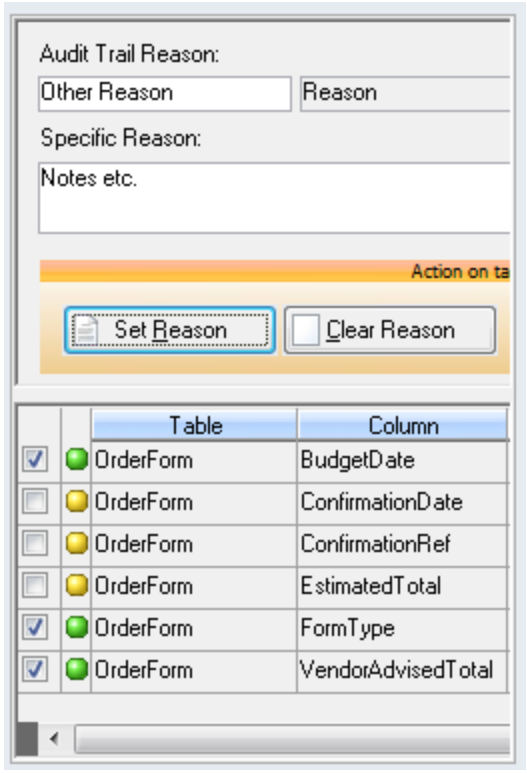


		Table	Column	Modification Date	Old Value	New Value
☑	🟡	OrderForm	BudgetDate	02.08.2011 16:24:08	2002-09-02 00:00:	2002-09-25 00:00:00
☐	🟡	OrderForm	ConfirmationDate	02.08.2011 16:24:08	2011-08-02 00:00:	2011-08-03 00:00:00
☐	🟡	OrderForm	ConfirmationRef	02.08.2011 16:24:08	reference	reference from ven
☐	🟡	OrderForm	EstimatedTotal	02.08.2011 16:24:08	150.000000	800.000000
☑	🔴	OrderForm	FormType	02.08.2011 16:24:08	1	2
☑	🟡	OrderForm	VendorAdvisedTotal	02.08.2011 16:24:08	175.000000	820.000000

   Fields where a reason is mandatory are marked with a red ball.
3. To apply the same reason to several fields at once, flag multiple fields.
4. Click the **Audit Trail Reason** lookup and select a reason code[2].

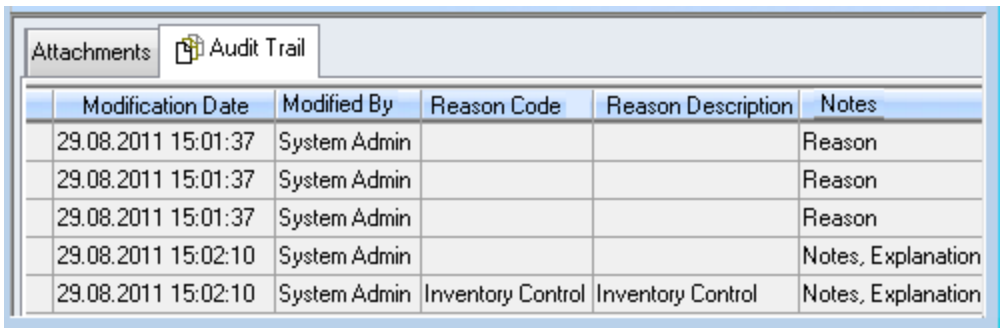
   If no reason codes are available/applicable, enter a free-text explanation.
5. Click **Set Reason**. The icon beside each checked field will turn green for a valid reason.

[1] According to user group access assigned on the audit trail configuration.
[2] The lookup is only active if reason codes are in use in the audit trail configuration.



If there are more fields to supply reasons for, flag them and repeat.

6. Click **OK** to return to the main window.
7. The reason and any notes will be saved in the Audit Trail Log and in the Audit Trail tab on the audited window if applicable:



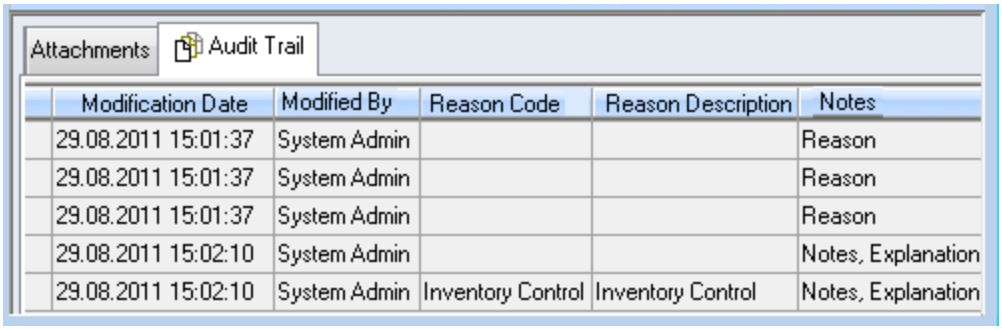
7.5 Viewing The Results Of An Audit Trail

Results of an audit trail are available to view in two places:

- the Audit Trail Log, according to user access; and,
- the Audit Trail tab available on some windows throughout the application which contain auditable fields.

7.5.1 The Audit Trail Tab

An Audit Trail tab is available on some windows throughout the application which contain auditable fields:



Modification Date	Modified By	Reason Code	Reason Description	Notes
29.08.2011 15:01:37	System Admin			Reason
29.08.2011 15:01:37	System Admin			Reason
29.08.2011 15:01:37	System Admin			Reason
29.08.2011 15:02:10	System Admin			Notes, Explanation
29.08.2011 15:02:10	System Admin	Inventory Control	Inventory Control	Notes, Explanation

The tab shows a record of all changes to audited fields in the current window.

7.5.2 The Audit Trail Log

The results of any audit trail you configure will only be available in the Audit Trail Log to users with the necessary access. Access to audit trails is set by table in the Audit Trail Configuration window.

To view the audit trail log:

1. Go to **Tools > Audit Trail Log**.
2. The tables you have access to are listed in the bottom of the filter General tab. Select one or more.
3. (Optional) Filter according to **Operations** (Insert, Update and/or Delete) as well as by a range of **Dates** or by the user who **Modified** the audited fields. Open the Reason tab to lookup a reason code to return only changes made with that reason assigned.
4. Click **OK** to open and view the log window. Filtered tables are listed on the left side of the window.

In some windows it is possible to access the Audit Trail Log window through the Options menu, if any audit trail log triggers are enabled in that window.

NOTE: The Audit Trail Log for a deleted record can only be accessed in the Audit Trail Log window - not in the current window tabs or options menus.

7.6 The Login Audit Log

The Login Audit Log tracks and displays a record of all the login activities taking place in the system. It is activated by a parameter setting:

1. Go to **Tools > Configuration > Parameters > Options > General > System Access >**.
2. Select the parameter 'Create Login Audit Trail'.
3. Set it to TRUE.
4. **Save** and exit the window.

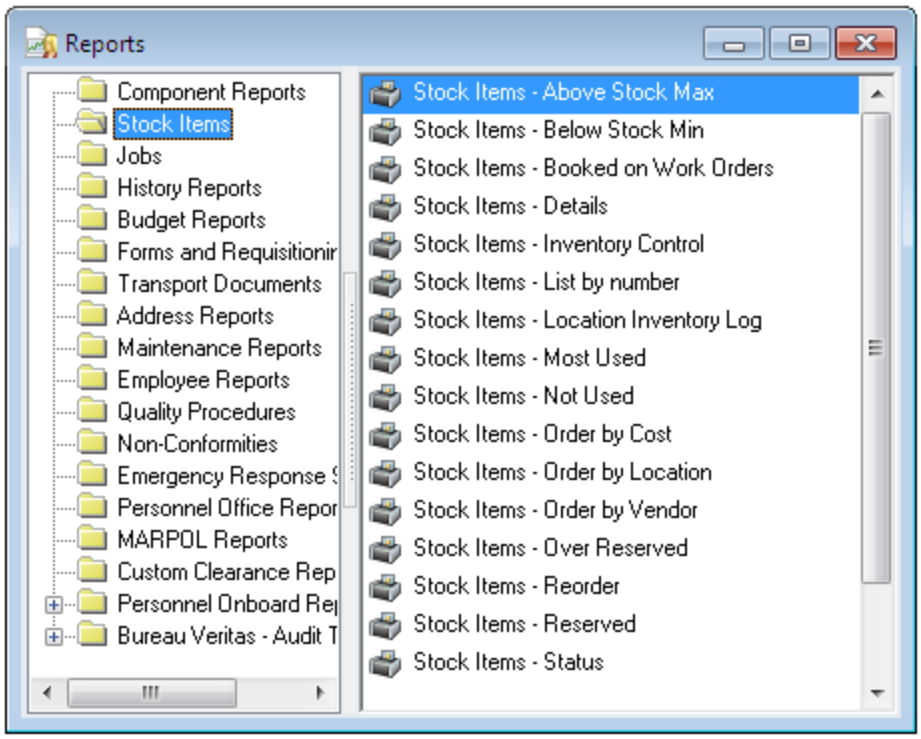
Then, to view the eventual log:

1. Go to **Tools > View Login Audit Log**.
2. The log opens: you can see **Login ID**, **User Names**, **Login** and **Logout** times and **Host** names, as well as the status of the attempt: Success, Invalid password, No such user, etc.

CHAPTER 8 Running And Printing Standard Reports

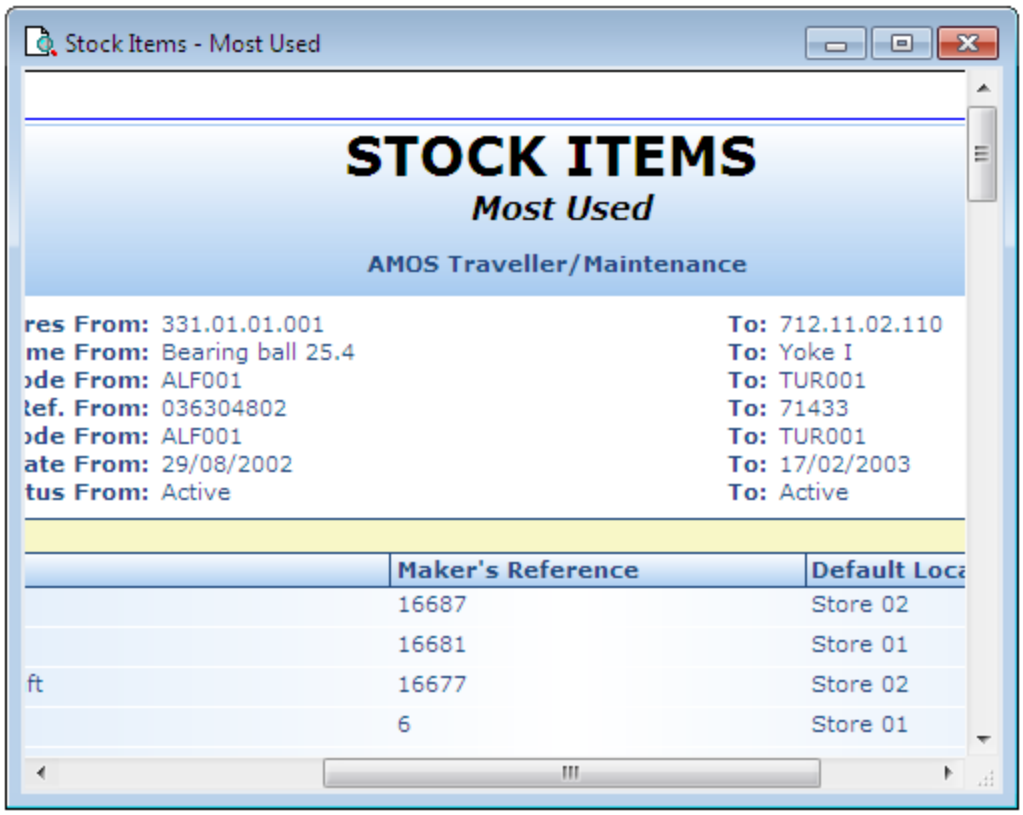
The AMOS Business Suite contains a set of standard reports stored in a hierarchy in the Reports browser window. It is also possible to design your own reports and include them in the hierarchy. See Chapter 22.

Go to **Tools > Report** to open the Reports window. Click on a folder to view the reports it contains:

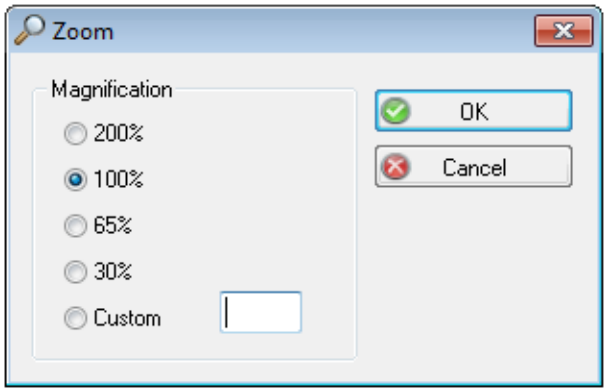


To preview a report:

1. Double-click on a report.
2. Use the filter to specify the information you want to include in the report.
3. Click **Print Preview** to see the report on-screen:



Click the **Zoom** button to select a zoom level:



Use the four buttons to the right of the Zoom button to browse the report pages:



4. Click the **Close** button to exit the preview; or click **Print** to print it as shown.

To print[1] a report:

1. Double-click on a report.
2. Use the filter to specify the information you want to include in the report.
3. Click **OK** in the filter to go straight to the Print dialog.
4. Click **OK** to print.

To change the default printer:

[1]Reports are printed in colour gradients by default. However, if the system parameter 'Report Use Plain Style' is set to TRUE, they will be printed in grey scale.

1. Double-click on a report.
2. Click **Printer Setup**in the filter.
3. Choose a new printer and click **OK** in the Printer Setup dialog.

Or:

1. Double-click on a report.
2. Specify the information you want to include in the report.
3. Click **OK**.
4. Click the **Printer** button in the Print dialog.
5. The Printer Setup dialog opens. Select a printer.
6. Click **OK**.

8.1 Saving A Report As A PDF

You can save a preview in PDF format. This requires you to install a secondary 'freeware' program - Ghostscript - on the computer.

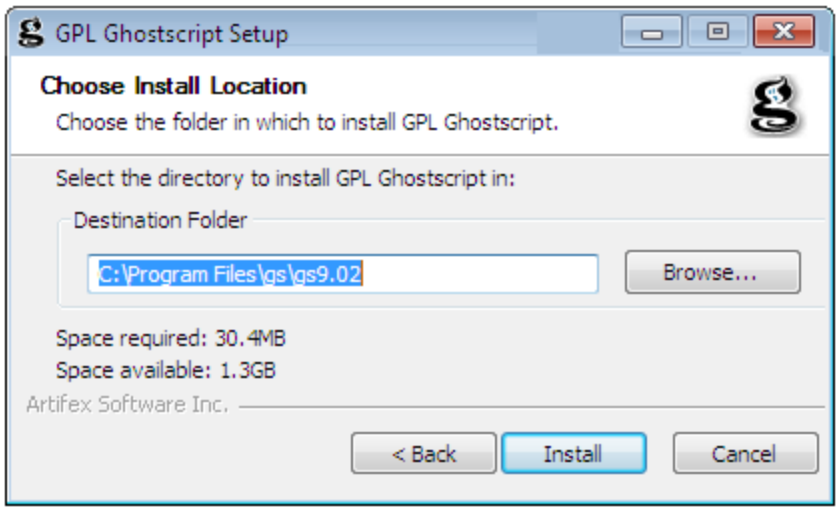
Ghostscript is available at: http://www.ghostscript.com/

The following instructions apply to users running on Windows 7. If you are running on a different version of Windows, some steps will differ slightly.

Installing and Configuring Ghostscript

To install and configure Ghostscript:

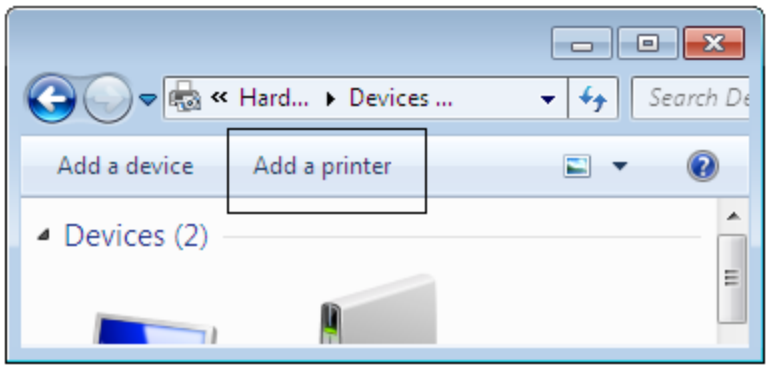
1. Double-click on the downloaded .exe file. Click **Next** in the Welcome dialog and **I Agree** in the License dialog.
2. The GPL Ghostscript Setup dialog appears. Choose the directory where you want to install Ghostscript:



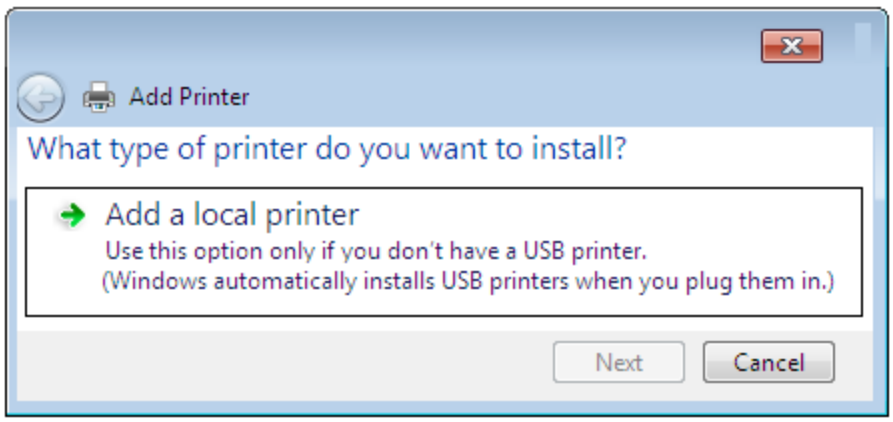
3. Click **Install**. A dialog will inform you when the installation is complete. Click **Finish**.

Having installed Ghostscript, next configure the PDF Printer:

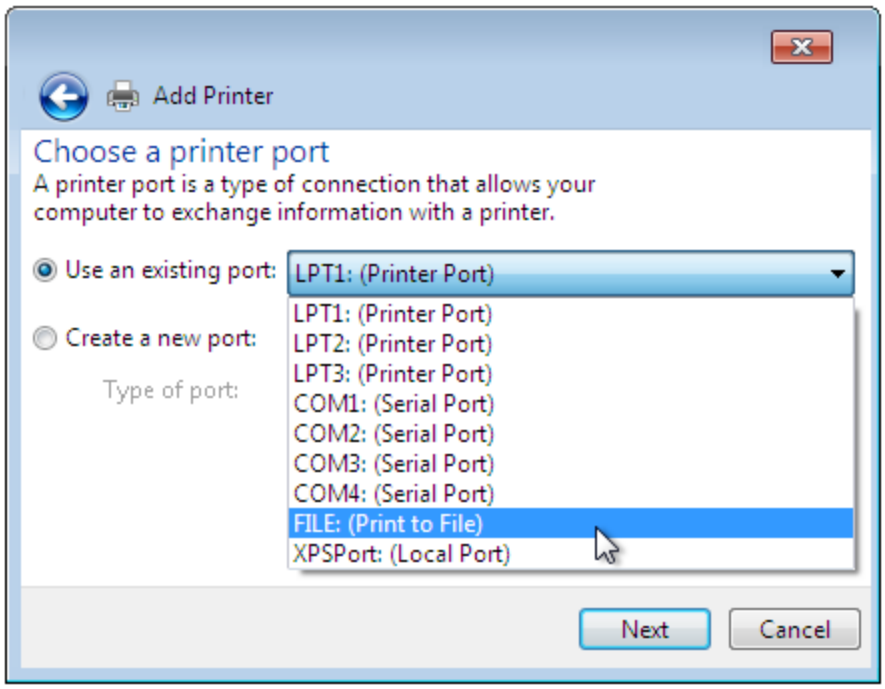
1. Go to **Start > Control Panel** and under Hardware and Sound click on **View Devices and Printers**.
2. In the dialog which opens click **Add a Printer**.



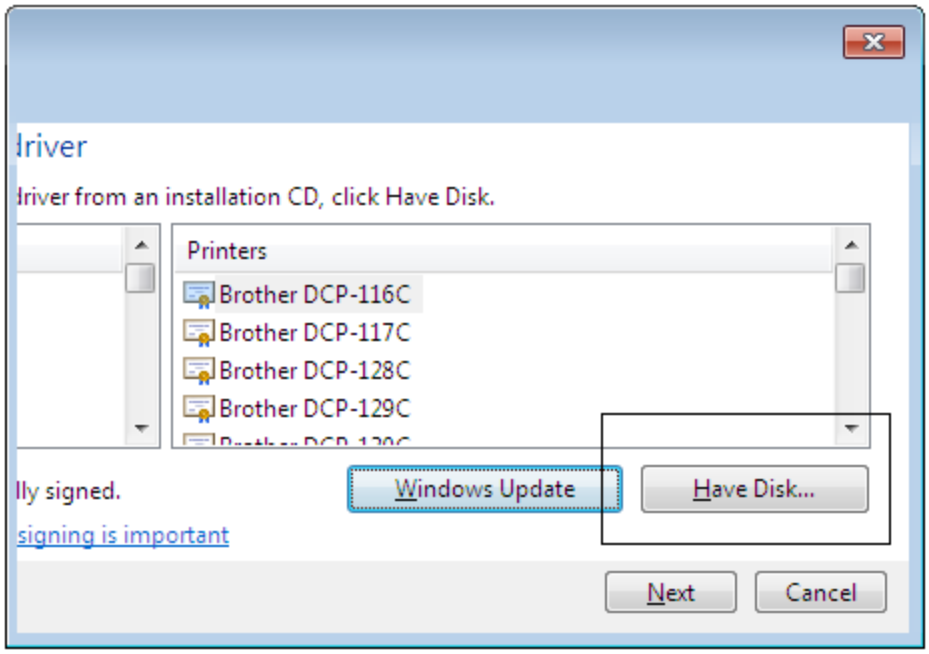
3. The Add Printer Wizard opens. Click on **Add a local printer**.



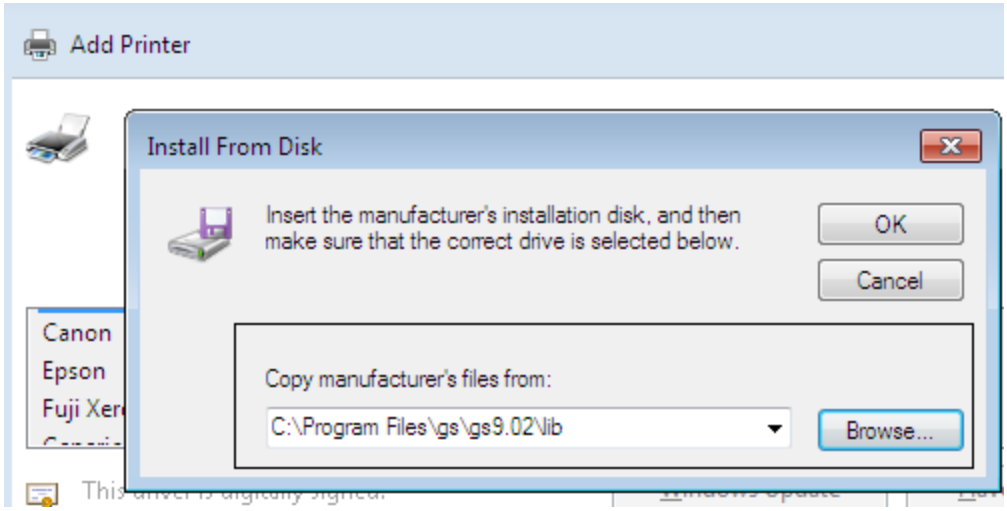
4. Select **Use an existing port** and then choose **FILE** from the drop-down list.



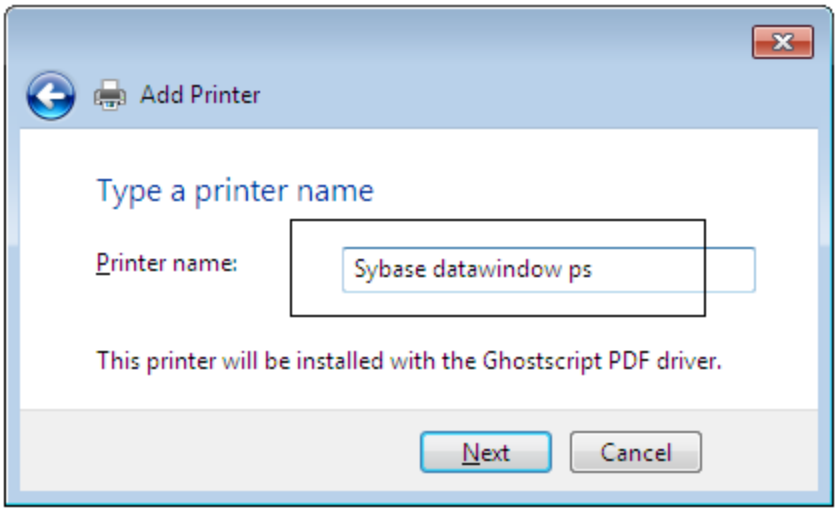
5. Click **Next**.
6. In the following dialog click **Have Disk...**



7. In the Install From Disk dialog, use the **Browse** button to open the Locate File window and find the ghostpdf.inf. This file is located in the path where you installed Ghostscript, in the folder \lib.



8. Click **Open** and then **OK**. You return to the Add Printer dialog; click **Next**.
9. In the next dialog, specify sybase datawindow ps in the **Printer Name** field.



10. Click **Next**. Then in the final dialog, click **Finish**.
11. After installing and configuring Ghostscript, open AMOS Business Suite.
12. Go to **Tools > Configuration > Parameters**.
13. Click on **Options > Purchase > Output** to view the 'Mail Attachment Type' parameter.
14. Set the parameter Globally to PDF Ghostscript. **Save** the window.

8.2 PSR Reports

You can create electronic versions of a printed report, called Powersoft Reports (PSR Reports):

1. Go to **Tools > Reports**.
2. Double-click on a report to open the filter.
3. Specify the information you want to include in the report.
4. Click **Print Preview**.
5. Go to **Edit > Save As**.
6. Browse to a location and enter a **File name** for the report.
7. Select 'Powersoft Report' from the **Save as Type** drop-down list.
8. Click **Save**.
9. Close and exit the preview.

To see the filtered and printed report on-screen:

1. Go to **Tools > View PSR Reports...**.
2. Browse to and select the report.
3. Click **Open**.
4. Click **Close** to exit the report.

CHAPTER 9 Hand Terminal Interface

A general file format allows AMOS Business Suite to support several standards. To support all the hand terminal formats that exist, it is necessary to have a converter application. One such application is already developed, and its source code is available for developers.

1. Go to **Tools > Hand Terminal Interface**. The Import Hand Terminal File dialog opens.

   The pre-set values are changeable. For example you can change the default department. You can select an .Htd file. Updates.htd is selected by default, found in the Installation Directory.

2. Click **Select Department** button and choose a department. Click **OK**.
3. Click **Select Hand Terminal File** and choose the file to import. You can set the default directory for Hand Terminal Files - see section 14.10.
4. Click **Read Hand Terminal File** to start the import of data from the selected file.
5. The database updates accordingly. Error messages appear if any error occurs, and all changes in the database are undone.

9.1 File Format

The supported file format is fairly simple. Hereafter called HTD, it is somewhat similar to the .Ini file format found on the Windows platform.

In general, the file format syntax is:

```
[Section]
Variable = Value
```

The first section in the HTD file is the header, which tells AMOS what version and the number of the transaction that is expected to be found in the .Htd file.

```
[Header]
Version=1
Transaction=X
```

This states that the .Htd file is version 1, the only format AMOS Business Suite currently supports.

The Transaction number is important. This tells how many Transaction sections that are found in the .Htd file.

```
[TransactionX]
```

```
PartNo=< Alfa-numeric value >
Type=< in (O, I, C) >
Date=<YYYY-MM-DD>
Quantity=<Numeric value>
O = out of stock
I = insert into stock
C = Stock Count
```

You must set the date in the given format.

9.1.1 File Sample

```
[Header]
Version=1
Transactions=2
[Transaction1]
PartNo=AE-100-001
Type=O
Date=1998-02-24
Quantity=1
[Transaction2]
PartNo=AE-100-003
Type=I
Date=1998-02-24
Quantity=12
```

9.2 Hand Terminal Interface Application

This application takes two arguments:

- **Directory** - tells the application where to store the .Htd file. If no directory is specified, it uses the current one.
- **Filename** - tells the application what name to give the .Htd file. If no filename is specified, it uses Updates.htd.

This application assumes that the hand terminal is connected to the keyboard input port of the PC. Click the **Read from Hand Terminal** button to start keyboard polling. Polling puts the keyboard input focus into a hidden single line edit control, and adds code to the keyup event of that window.

Click the **Stop** or **Close** button to terminate the polling.

The polling stops automatically when the hand terminal unit sends the Termination sequence and an .Htd file is stored with the given name in the given directory.

Verify that the correct data transmits by inspecting the window control at the bottom of the window (DataWindow).

CHAPTER 10 Overview Panels

AMOS Overview Panels give users a quick status summary in different areas of AMOS - for example,you can design an overview panel to display overdue maintenance work in several different ways, all in one place:

- gauges to show the total percentage of overdue work and the number of work orders due in the next 30 days
- ratios showing the amount of unplanned work vs. planned work, planned work vs. total work due, etc.
- graphs to show the amount of overdue work by maintenance cause and overdue work by installation.

These gauges, graphs and ratios together would comprise one Overview Panel.

1. Configure these panels to display the information you are interested in. See section 10.2.
2. The results of your configurations will be displayed in the Overview Panels window. See section 10.1.

10.1 The Overview Panels Window

Access to the defined panels is assigned in the configuration window and determines which panels a particular user group will be able to view.

To open an overview panel:

1. Go to **Tools > Overview Panels**. The Overview Panel select dialog opens, listing all configured panels available according to your access.
2. Click the panel you want to see, and click **OK**. The Panel opens.

This window presents current information regarding the status of the area of the application it applies to. You cannot make any changes inside this window to any of the values.

10.2 Configuring Overview Panels

The presentation of the gauges, graphs and ratios in the panels on overview panels is fixed but the value and value definitions are configurable.

To define a new panel:

1. Go to **Tools > Configuration > Overview Panels Configuration**.
2. Click the **New** button on the toolbar. The two gauges and two graphs are shown in the upper left corner of the window. Click on one to define its settings:

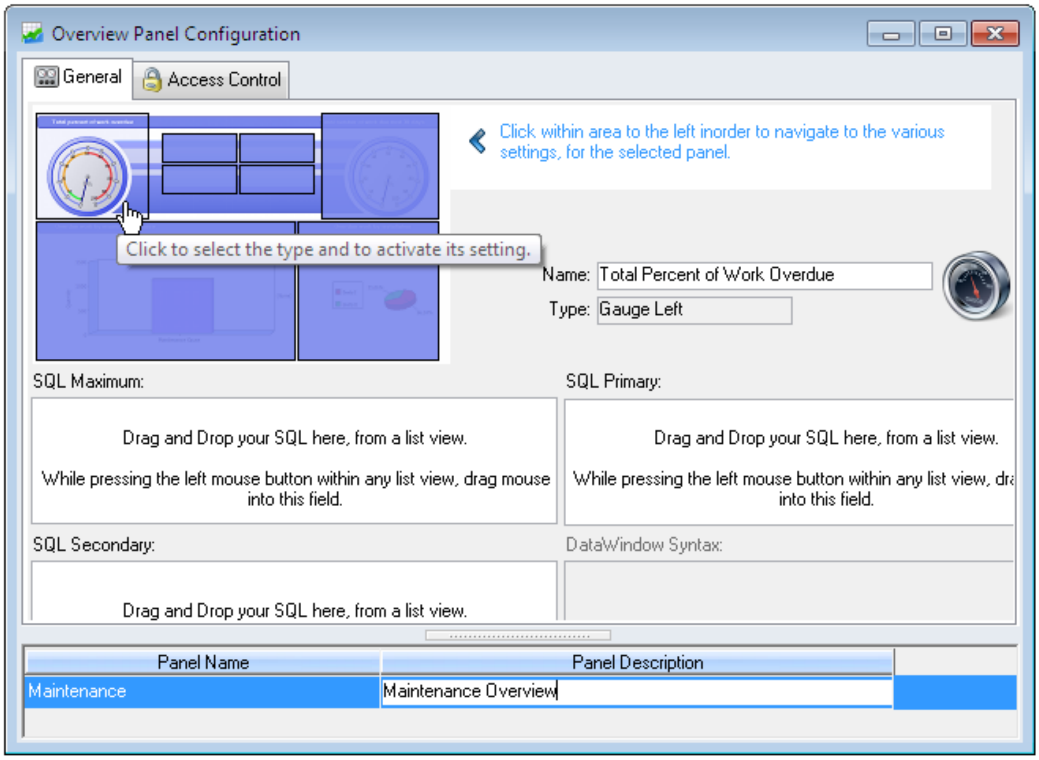


Figure 71 Configuring a Panel for a Maintenance Overview

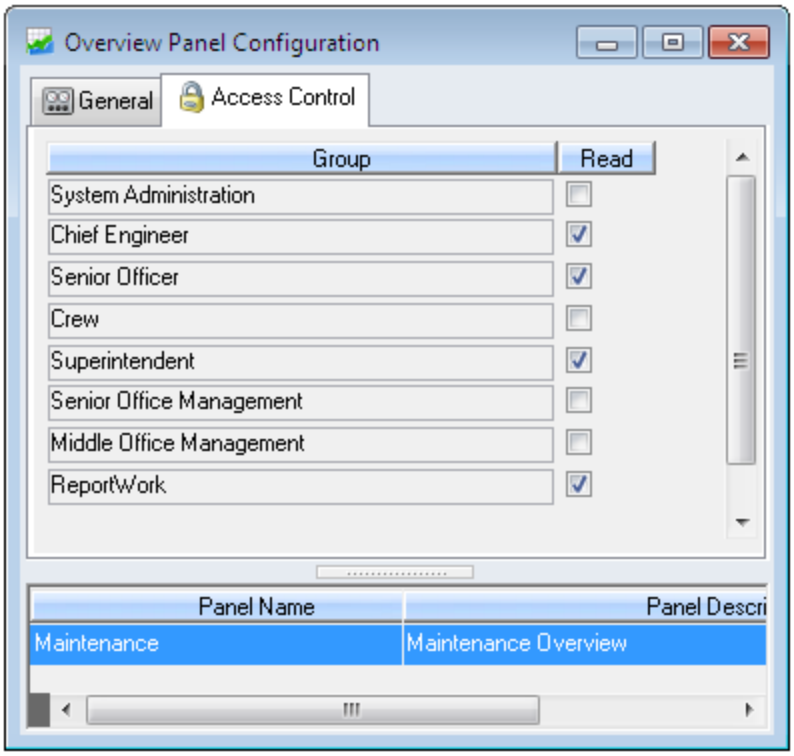
2. Enter a **Panel Name** and **Panel Description** directly into the list part of the window. This is the name for the entire panel. Define an individual **Name** for each gauge and graph in turn as you click on one to set it.
3. Set the ratio boxes and gauges by dragging and dropping SQL statements from any list view into the SQL Maximum, SQL Primary and SQL Secondary boxes. This is done in the same way as when defining alerts to appear on the dashboard. See section 19.2.2, for more information. The three different SQL statements control the displayed values as follows:
   - **SQL Maximum** - defines the maximum value on the gauge itself.
   - **SQL Primary/Secondary** - control the position of the first and second indicator lines on the gauge.



Figure 72 A gauge. Max value 100, two indicators defined by SQL Primary/Secondary

4. To define the settings for the two graphs[1], click a graph and the DataWindow Syntax area becomes active. Use the lookup button next to it to load the data window syntax from a PBL file. Any data window syntax is valid so the presentation may not necessarily be a graph.
5. **Save** your settings and the Overview Panel will become available.

The Access tab contains a list of all defined Groups in your system and you can grant access to the appropriate groups for the selected panel:



The result of these settings is displayed in the Overview Panels window at **Tools > Overview Panels.** If some of the elements are left undefined, the presentation will adjust accordingly.

[1]The settings for the two graphs are based on data window syntax, which needs to be created in a PowerBuilder data window painter and stored in a PBL file. Users can then import the syntax into AMOS.

CHAPTER 11 Translating Text In AMOS

Translate the text for labels in AMOS into alternate languages within AMOS itself, using the Translation window[1].

Starting a Translation Project

SpecTec provides source files containing the English language translatable text[2] in AMOS. These files are located in your AMOS installation folder:

- source.cry - contains a list of words without indication of their location in AMOS. The same translation will be applied to every instance of an original text entry:

Row	Original Text	Translated Text	Info	Text Location
5	Components	Komponenter	OK	
6	Component Copy	Komponenter Kopi	OK	
7	Job Descriptions	Jobb Beskrivelser	OK	

- sourcep.cry - contains a list of words with the path to each one, indicating where it is found in AMOS - whether the text is for example a menu entry or a field label in a window - meaning that different translations can be applied depending on where the text is located in AMOS:

Original Text	Translated Text	Text Location
#QUOTE#Component#QUOTE#	#.d_std_xls_maint_planned..#QUOTE#Compone	#.d_std_xls_maint_planned..
#QUOTE#Component#QUOTE#	#.d_std_component_misc2_loc..#QUOTE#Comp	#.d_std_component_misc2_lo
#QUOTE#Component#QUOTE#	#.d_std_component_status_order..#QUOTE#Cor	#.d_std_component_status_o

- srcupdt.cry - Srcupdt.cry is for making updates to a translation project already in progress.

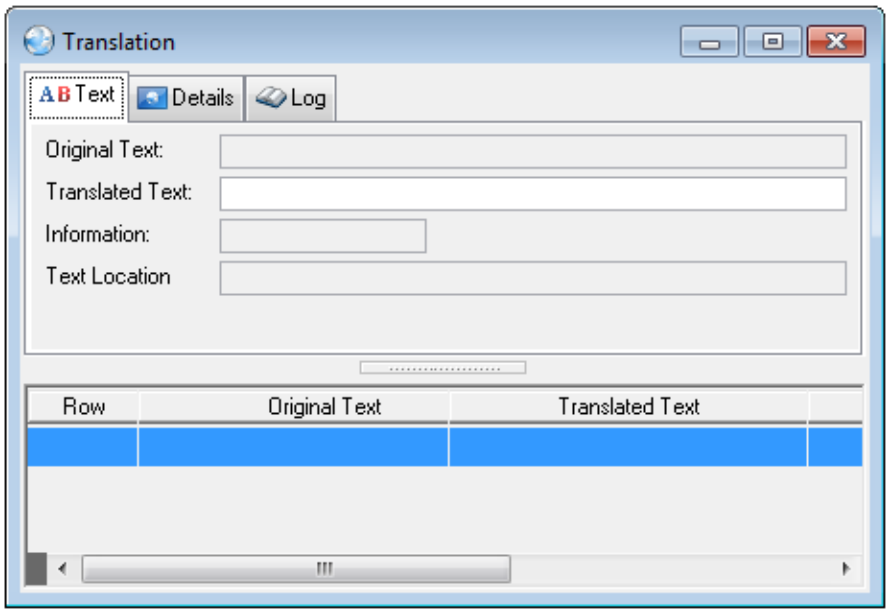
You need a destination file as well. SpecTec does not provide this, so the first time you do a translation using the tool in AMOS, create a destination file by copying and renaming the source/sourcep.cry file (depending on whether you plan to translate words with or without their path) to dest.cry.

[1]Translation capabilities are access-controlled.
[2]Most, but not all text in AMOS is translatable. For example, parameter settings like TRUE and FALSE, are not translatable.

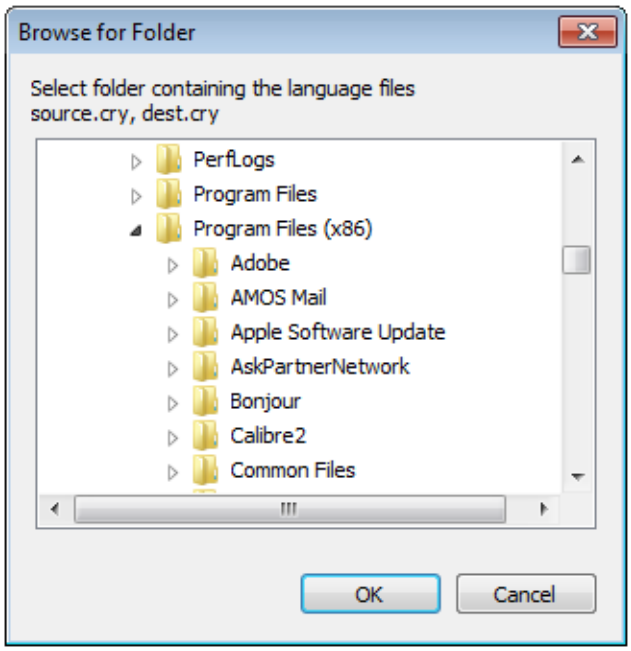
Translating the Text

To start a new translation, make a dest.cry file and then:

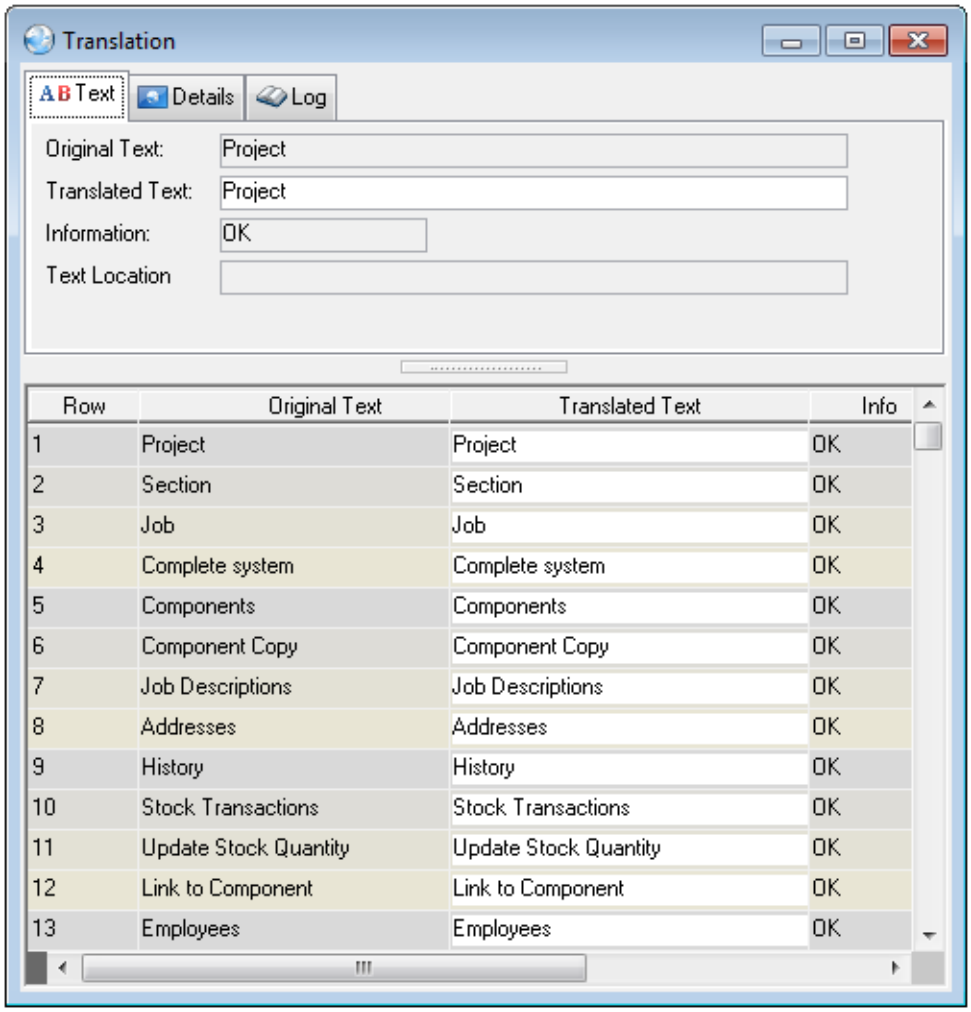
1. Go to **Tools > Utilities > Translation**. The window is totally empty:



2. Load the source and destination files: go to **Options > Load Words...**



3. Browse to and select the folder where both files are stored. Click **OK**.
4. AMOS populates the window with the English text:

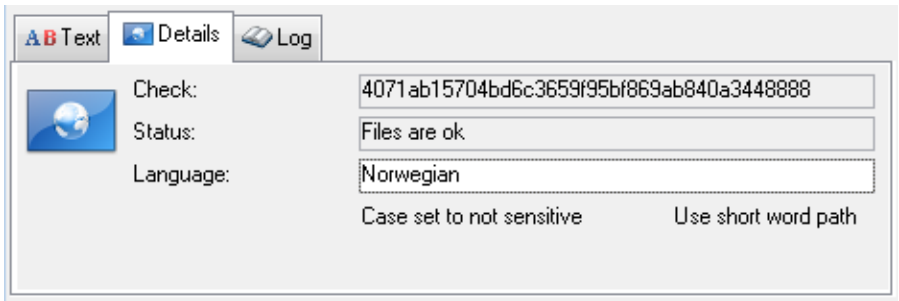


The **Original Text** is the text found in AMOS, loaded from the file source.cry.

The **Translated Text** displays the same words, for you to overwrite with your translations.

In this example, the **Text Location** field is empty because the source.cry file was loaded. Paths to text locations in AMOS show up when you load the sourcep.cry file - see section 11.1.

5. Open the Details tab and enter the **Language** you will translate to:



Write this in English, because it will later be shown in the System Information[1] dialog.

6. Enter a translation for any/all labels in the **Translated Text** column.

[1] Help > About > 'System Info'.

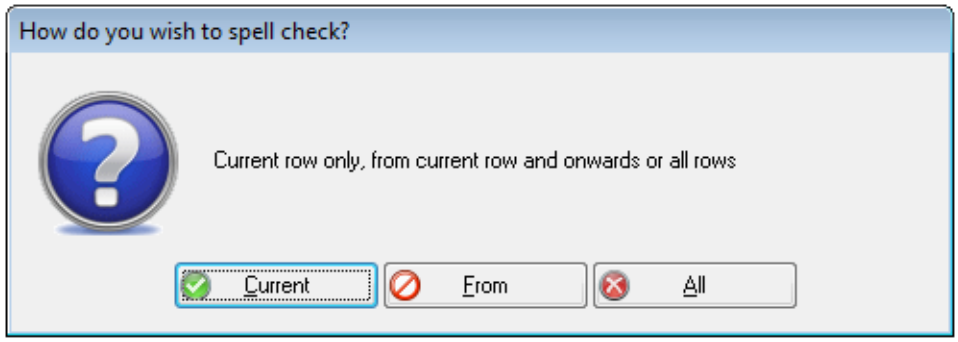
7. Click **Save**. AMOS will verify that your new labels are valid and update the 'Info' column with **OK** for every acceptable entry.

Note that the details of this process are recorded in the Log tab. Double-click on any entry there to scroll to the row in the list. You can **Clear** the log or **Save** it to any location you choose. When your translation is complete, modify the Amosw.ini file to apply the translations in AMOS.

Spell Checker

The standard Microsoft Word spell checker is available provided you have Word installed and using the language you are translating to. When using the spell check, it's a good idea to expand your dictionary as you go, with new or business-specific words so the spellchecker will recognise them next time.

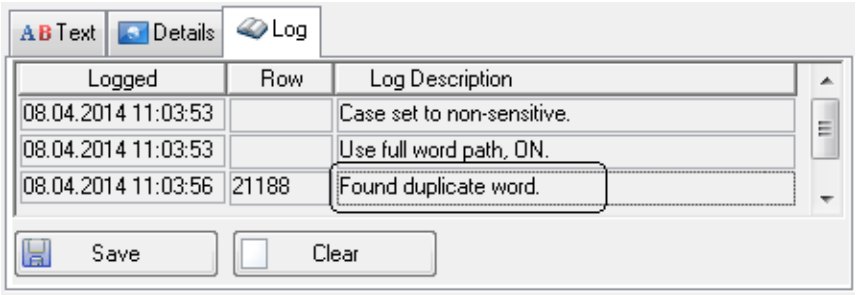
1. Go to **Options > Spell Check**.
2. AMOS asks you to select the rows to check.



3. Make your selection and the standard MS spellchecker opens.

Delete Duplicates

Where the translated text has been duplicated, AMOS will record it in the log tab:



Double-click on an entry in the log to scroll the window to that row. Or, sort the window by the 'Info' column, to see duplicates listed together.

Remove duplicates one at a time by selecting each one and clicking the **Delete** button, or go to **Options > Delete Duplicates** to remove all duplicates in one operation.

Import/Export

To import or export the list of text into text files, go to **Options > Import/Export Text Files**. The standard import/export text files are stored in the AMOS installation directory.

Copy List to Excel

To copy the window contents to an excel spreadsheet:

1. Go to **Edit > Copy List**.
2. Open Excel.

3. Paste the window contents into a spreadsheet.

11.1 Translating Source Files With Text Locations

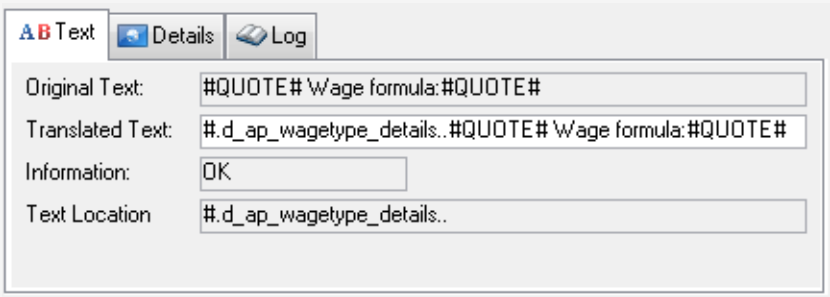
The same text can appear in multiple places in AMOS - to translate certain instances of it only, or to translate the same word to different translations depending on where it appears in AMOS, use the sourcep.cry file.

1. First, locate the sourcep.cry file in your AMOS installation folder. Rename it to source.cry.

   Then, copy it and name the copy dest.cry.
2. Return to AMOS and open the Translation window.
3. Go to **Options > Load Words...** and select the folder where both .cry files are stored.
4. When AMOS loads the English **Original Text**, a path showing the **Text Location** in AMOS for each entry, is also displayed.

EXAMPLE

In the illustration below the text 'Wage formula:' is found in the datawindow object d_ap_wagetype_details:



The process for translating and then applying the translated text is the same.

11.2 Applying The Translated Text In AMOS

When you have completed your translation, log out of AMOS. To activate the translations:

1. Locate the Amosw.ini file in the AMOS installation directory.
2. Open the file and set Translate=1:

```
[Translation]

Translate=1
;         (<Blank> | 1 | 0 )
;              1 = Translation on
;              0 = Translation off
;        <Blank> = Translation off

SourceFileName=source.cry
;         Only applies with "Translation on"

DestinationSourceFileName=dest.cry
;         Only applies with "Translation on"
```

3. **Save** and close the ini file.
4. Log back into AMOS for the translations to take effect. Any non-translated labels will still be displayed in English.

11.3 Validation And Special Characters

When you save translated text, AMOS will verify your changes and check for use of these special characters:

Character	Meaning	Shows in AMOS As
~t	tab	#TAB#
~r~n	carriage return	#CR#
&	underline, on a menu item or command button such as &F = F	#LF#
~"	special character, string identifier such as abc~"D~" = abc"D"	#QUOTE#

The format of the translated text must be equal to the original text. This means that if any such character existed in the original text, exactly the same number and type of special characters must be present in your translation for AMOS to accept it and give the status 'OK' to that label.

EXAMPLE

"&Print~tCtrl+P" could be translated to "&Skriv ut~tCtrl+P". The & defines that the character immediately following it should be shown with an underscore in the menu entry, both in the original text and in the translated text.

11.4 Updating A Translation Project

A srcupdt.cry file is supplied with every new version of AMOS. This file contains all of the new words available to translate.

To update your current source and destination files with new words:

1. Open the Translation window.
2. Go to **Options > Load Words...** and select the folder where your original source.cry and dest.cry files are stored.
3. Go to **Options > Update Words**.
4. AMOS will load the new words in the update source word cry file (srcupdt.cry) and merge them into the existing list.
5. AMOS will inform you of how many rows were added.

The process for translating and then applying the translated text is the same.

CHAPTER 12 Options: Customising The Interface

The **Tools > Options** window is for customising certain aspects of the AMOS user interface and experience:

- **General**Control things like toolbars, tooltips and certain behaviours across the system.
- **Views**Create and save frequently used screen configurations.
- **Predefined Fields**Create and save field configurations to appear in certain windows by default.
- **Predefined Filters**Predefine the criteria to be populated onto any selected filter.
- **Dashboard**Enable/disable the dashboard, and customise the alerts list present on it.
- **Theme**Tailor the general appearance of AMOS using custom or predefined themes.

Access to Options window settings is controlled by the 'User Options' entry in the Access Control window Functions tab. Without access you cannot reset options.

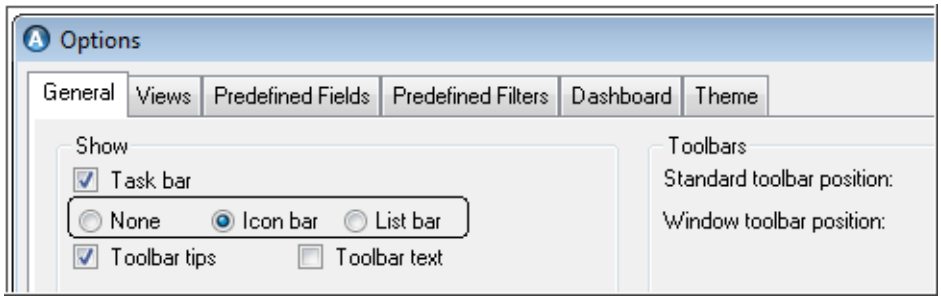
12.1 Options - General

The Options window General tab contains settings which control things like toolbars, tooltips, and certain behaviour across the system. Settings apply to the currently logged in user only.

List Bar or Icon Bar

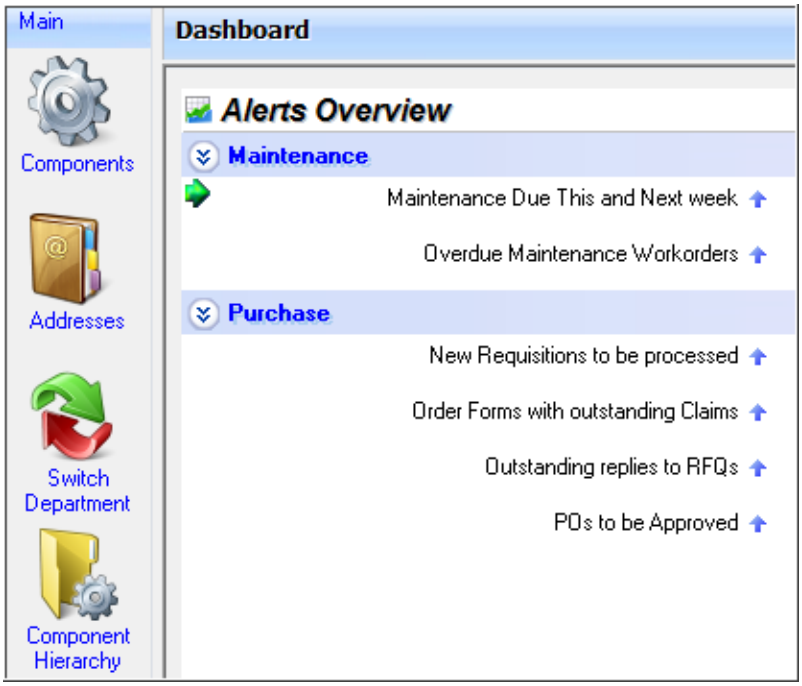
You can choose to have an Icon bar or a List bar present:

1. Go to **Tools > Options**.
2. Click **None**, **Icon bar** or **List bar** on the General tab:



3. Click **OK** to exit the dialog with your setting applied.

The List bar/Icon bar appears on the left hand side of the Dashboard and contains shortcuts to main areas of the application:

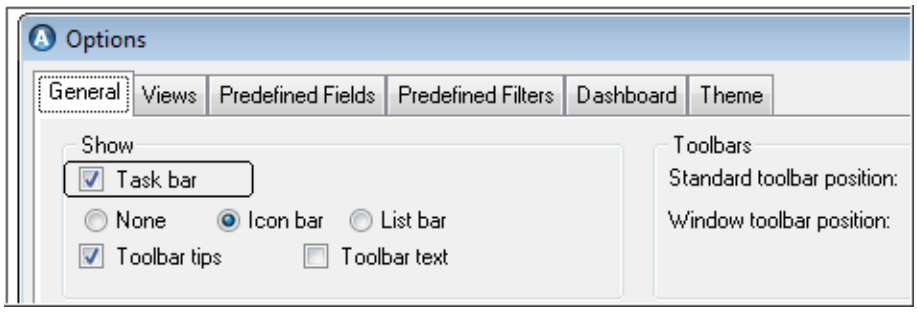


Once enabled, it is visible from any window.

The Task Bar

You can also show or hide the task bar:

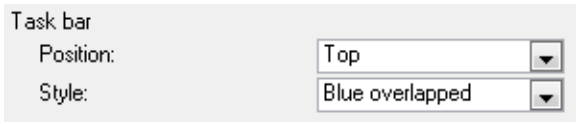
1. Go to **Tools >Options** and check or clear the **Task Bar** checkbox in the General tab:



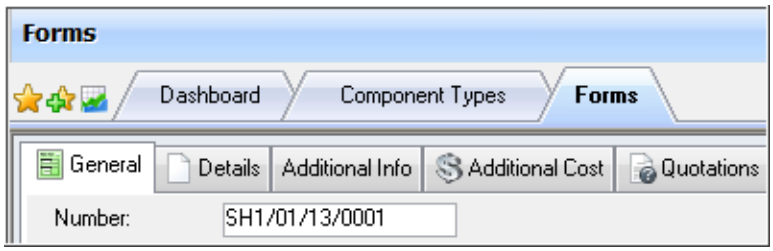
2. Click **OK** to exit the dialog with your setting applied.

The task bar shows you which windows are currently open. To configure its appearance and position:

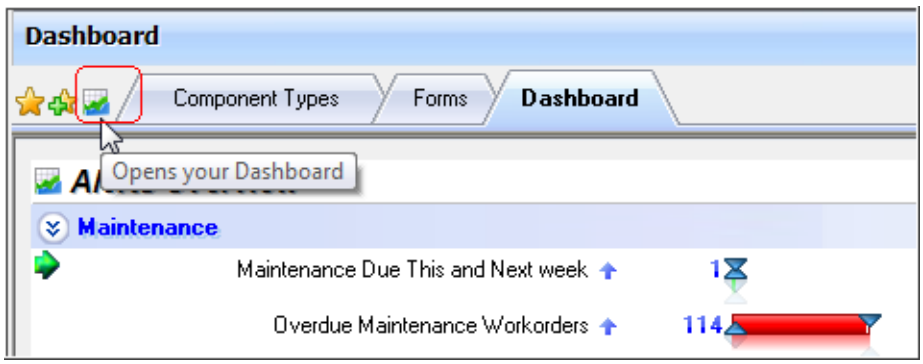
1. Go to **Tools > Options** and switch it on in the General tab.
2. Open the Theme tab and select a **Position** and **Style** for the task bar:



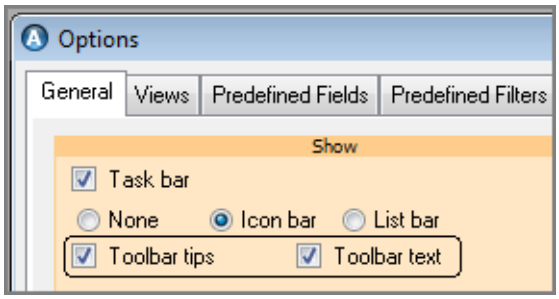
3. Click **OK** to leave the dialog and you will see the task bar appear as defined:



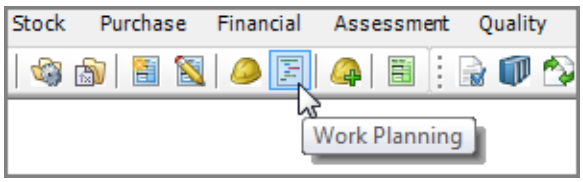
When other windows are open, clicking the dashboard icon on the task bar returns the dashboard to the front of your screen, leaving the other windows open underneath:



Toolbar Tips and Text



Flag **Toolbar tips** to turn on tooltips in the standard and window toolbars:



Flag **Toolbar text** to turn on text underneath toolbar icons:



General Options

- Flag **Confirm on Exit** to make AMOS request confirmation prior to exiting.
- Flag **Warning on Filter Without Given Criteria** to make AMOS issue a warning message whenever you try to click **OK** in any filter without entering search criteria.
- Select a **Windowing mode** to define whether windows open maximized by default, or cascaded by default.
- Set the number of seconds between checks for unacknowledged notifications in the **Mailbox/Dashboard Check Interval (sec)** field. AMOS will check at the set interval and notify you if there are any notifications awaiting acknowledgement in the Work Flow Notifications window.
- Set the number of minutes for which AMOS can be idle before it locks, in the **Idle Time Out (min)** field. Once the allotted time has passed, the windows will remain open but the logon dialog will appear and require you to enter your password.

Toolbars: Positioning

Set the position - top, bottom, left, right or hidden - for both the standard toolbar and the window toolbar.

Tabs: Appearance

Choose whether window tabs should appear all in one line with arrows to scroll through the tabs that are not visible, or stacked in multiple rows and all visible at once.

12.2 Options - Views

AMOS can save frequently used screen configurations, called Views. A view records which screens are open, which screen is active, which filter criteria are defined and the sorting order applied in the window. Each saved view can be restored as and when required.

Views are available for selection according to their 'scope':

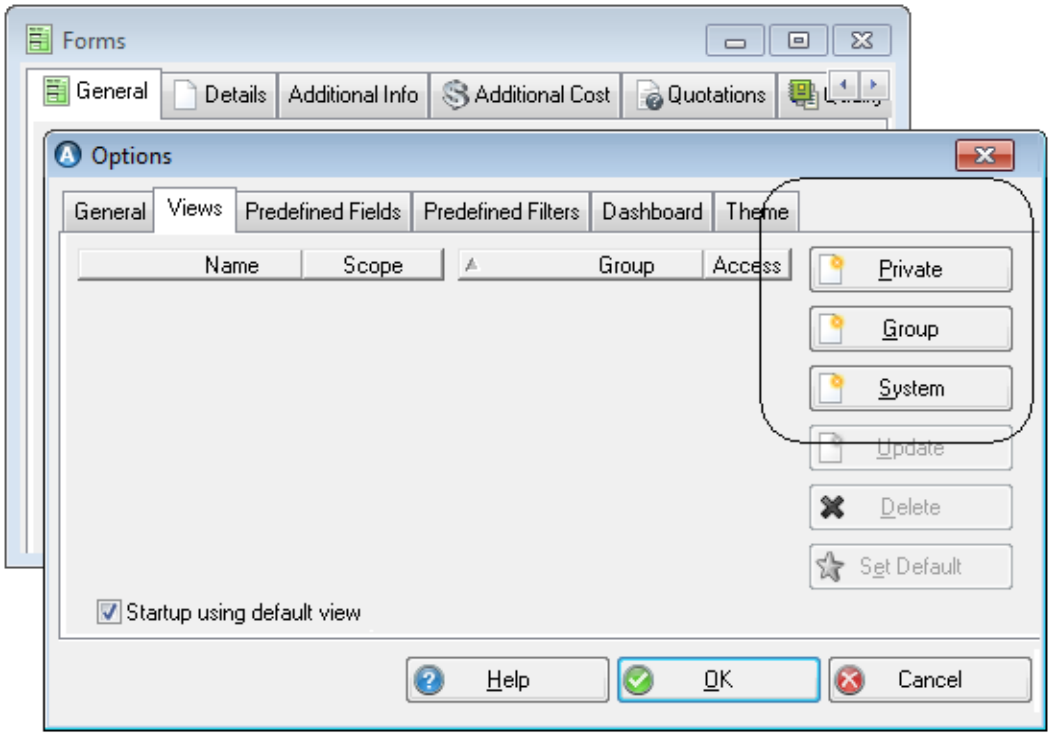
- A **Private** view will only be accessible to the person who created it, the logged-in user.
- A **Group** view will be accessible to one or more user groups.
- A **System** view will be accessible system-wide to any logged-in user.

> **EXAMPLE**
>
> You frequently use the Purchase Forms window and would like to access it instantly with certain information present - only active forms of type Purchase Order. You filter the Purchase Forms window to show the content you want and sort it. Then you save the window as a View, with scope 'Private'. This view will be available to you the next time you start AMOS.

12.2.1 Creating A New View

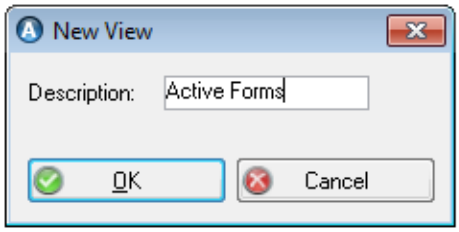
1. Open a window - for example Purchase Forms - and filter it to the content you want to see. Sort the content to your liking.
2. In the active window, go to **Tools > Options...** and open the Views tab.

   Or, click the button on the task bar to open the Options window directly to the Views tab.
3. Click one of the three buttons to define the view's scope[1] : **Private**, **Group** or **System** :

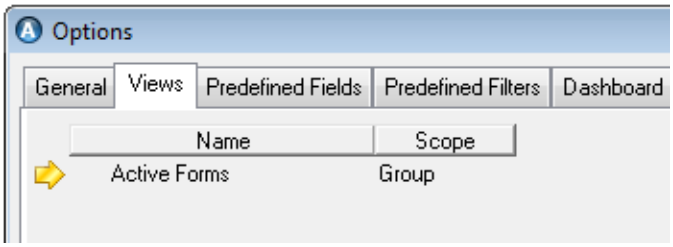


The New View dialog opens:

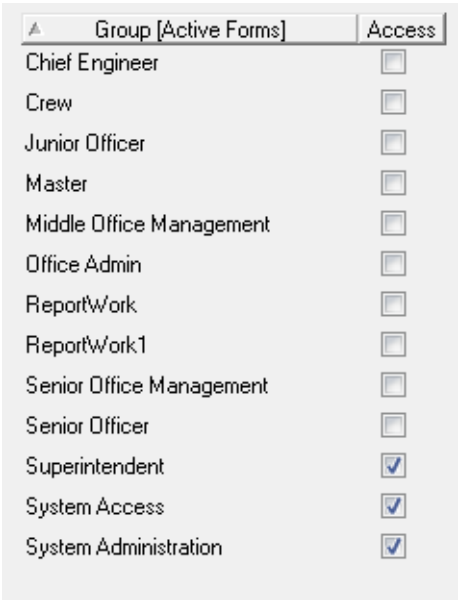
[1] The scope you are allowed to select for a new view depends on your access rights.



4. Give the view a name and click **OK**to return to the Views tab. The **Name** and **Scope** are shown on the left side of the tab:



5. If you created a Group view, flag the user groups[1] in the **Access** column to assign access to select this view:



6. Click **OK**. The next time AMOS is started up, the new view will be available for selection according to its scope and the identity of the logged-in user.

12.2.2 Updating A View

To update an existing view:

1. Open a window which already has a view defined, that you want to change.
2. Filter and sort the information to include your changes.
3. Go to **Tools > Options** and open the Views tab.
4. Select the view in the list. If it is a group view, you can add or remove groups by flagging and unflagging in the **Access** column.

[1]Your access rights determine if you are allowed to add or remove Groups from the Access list for Group views.

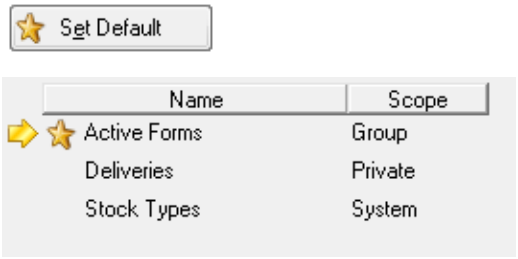
5. Click **Update**[1].
6. Change the **Description** if needed and click **OK**.
7. Click **OK** to exit the Options window. The view is updated accordingly.

To remove a view from the list select it and click **Delete**.

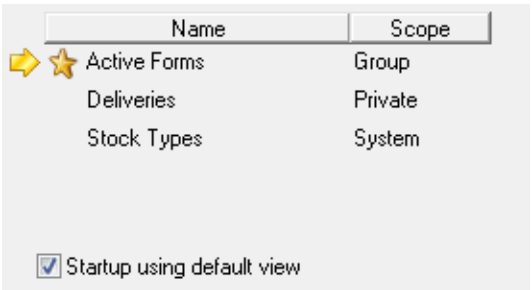
12.2.3 Setting A Default View

To set a default view for startup:

1. Go to **Tools > Options...** . Open the Views tab.
2. Select a view in the list.
3. Click **Set Default**[2]. The selected view is flagged with a star:



4. Check 'Startup using default view':



5. Click **OK** to exit the Options window.

At next startup AMOS will automatically open at the default view, according to its scope and the identity of the logging-in user.

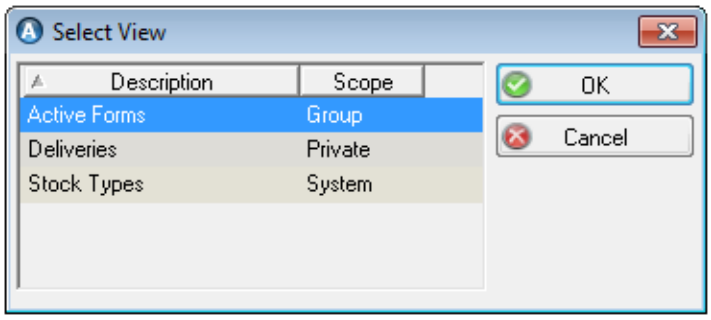
12.2.4 Selecting Or Changing The View

Views are user-defined, frequently used screen configurations: a record of open screens, which screen is active, which filter criteria are defined and the sorting order applied in the window.

There are several ways to select and change the view as required. When you select a different view, it opens up in the place of the window you were in.

Go to **Tools > Select View** or press the **F6** key. The Select View dialog opens:

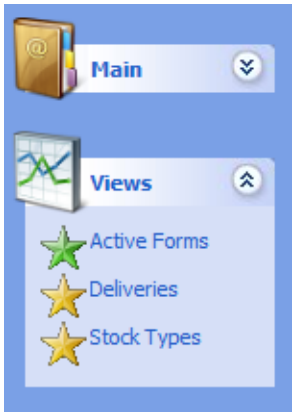
[1]Your access rights determine if you are allowed to update or delete views, and add or remove groups from the Access list.
[2]Setting a default view to be used at startup depends on your access rights.



Choose a view in the list and click **OK**.

Or,

Select a view from the Views menu in the list bar/icon bar[1]:



Or,

Click the shortcut button on the top left corner of the task bar to open the Select View dialog.

This shortcut button opens the Options window to the Views tab, where you can configure views to add to your list.

12.3 Options - Predefined Fields

To save field selections created with the Field Chooser, create a predefined field configuration. The next time the relevant window is opened, AMOS will display or hide the fields according to the predefined field configuration.

Predefined field configurations will apply in the window(s) they are created for, according to their 'scope':

- A **Private** configuration will only apply to the person who created it, the logged-in user.
- A **Group** configuration will apply to one or more user groups.
- A **System** configuration will apply system-wide to any logged-in user.

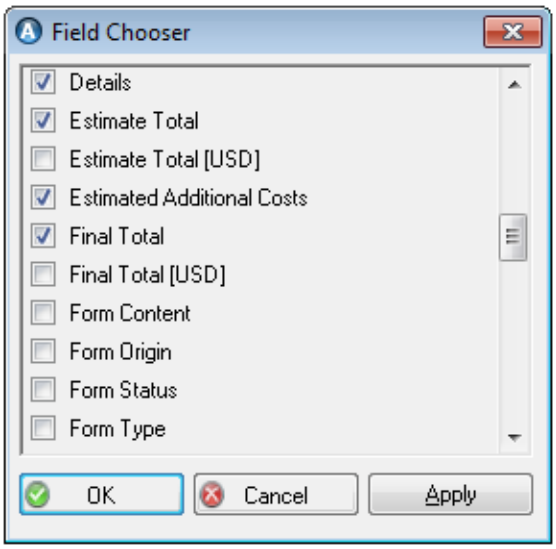
It is possible to create predefined field configurations that conflict with each other. For example, if there is a predefined field configuration on the Forms window for a user group, but

[1] If the list/icon bar is not visible, enable it in the Tools > Options > General tab by clicking the radio button for 'Icon bar' or 'List bar'.

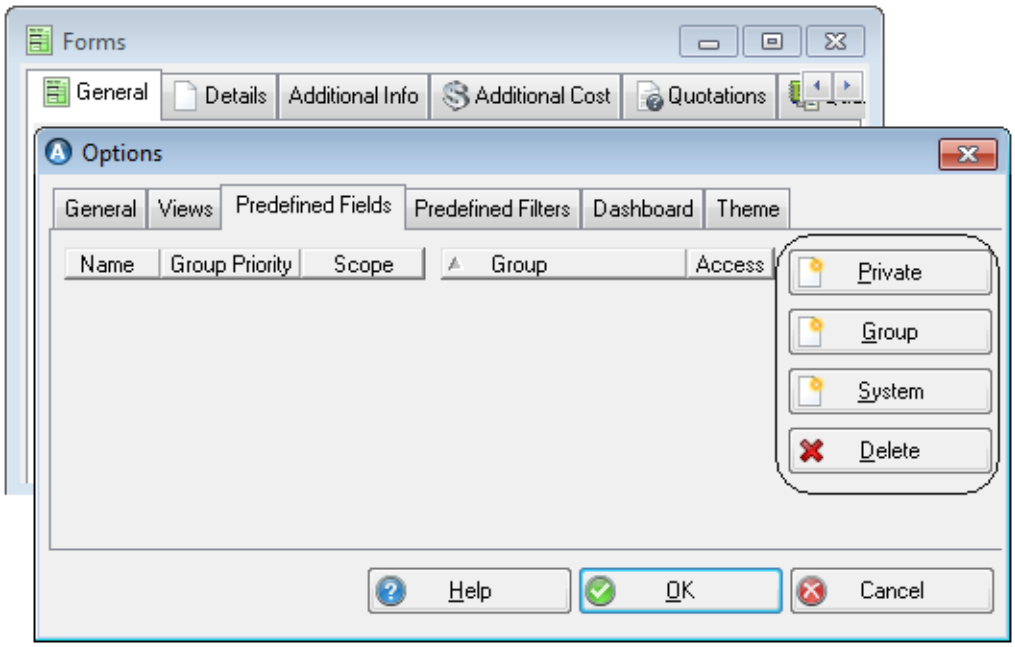
one of the users in that group also has a private predefined field configuration for the same window, which of these two will AMOS use? In this case, configurations with private scope receive first priority; then those with scope set to group, and then system.

12.3.1 Creating A New Predefined Field Configuration

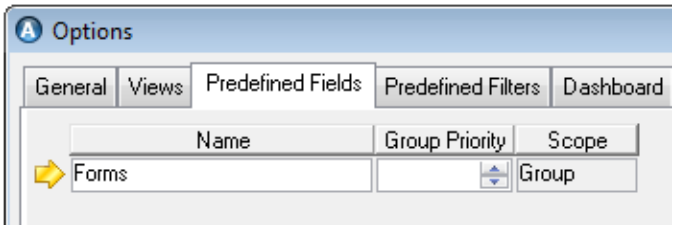
1. Open a window and right-click in the list part.
2. Select **Field Chooser**:



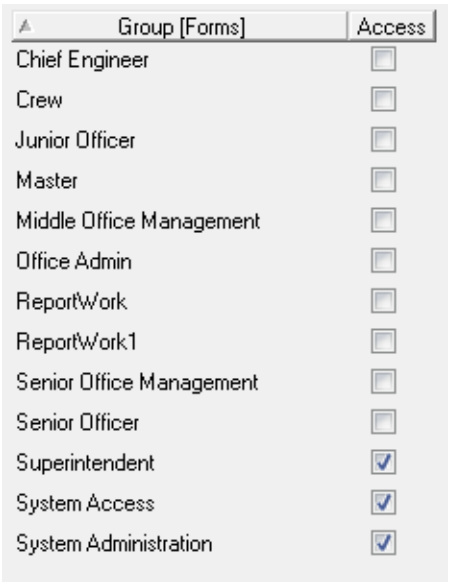
   Flag the fields you want to see in the list. Unflag any fields you want to hide from the list.
3. Click **OK** to return to the window and see the flagged fields in the list.
4. (Optional) Drag and drop the columns to rearrange the order they appear in.
5. From the active window, go to **Tools > Options...** and open the Predefined Fields tab:



Click one of the three buttons to define the configuration's scope[1] : **Private**, **Group** or **System**. The window **Name** and **Scope** are added to the left side of the tab:



6. If you created a Group predefined field configuration, flag the user groups[2] in the **Access** column to assign access to this configuration:



7. Click **OK**. The next time AMOS is started up the predefined field configuration will apply in the designated window, according to its scope and the identity of the logged-in user.

12.4 Options - Predefined Filters

To customise default filter criteria to be populated automatically onto a selected filter, create a predefined filter configuration.

Predefined filter configurations will apply in the filter(s) they are created for, according to their 'scope':

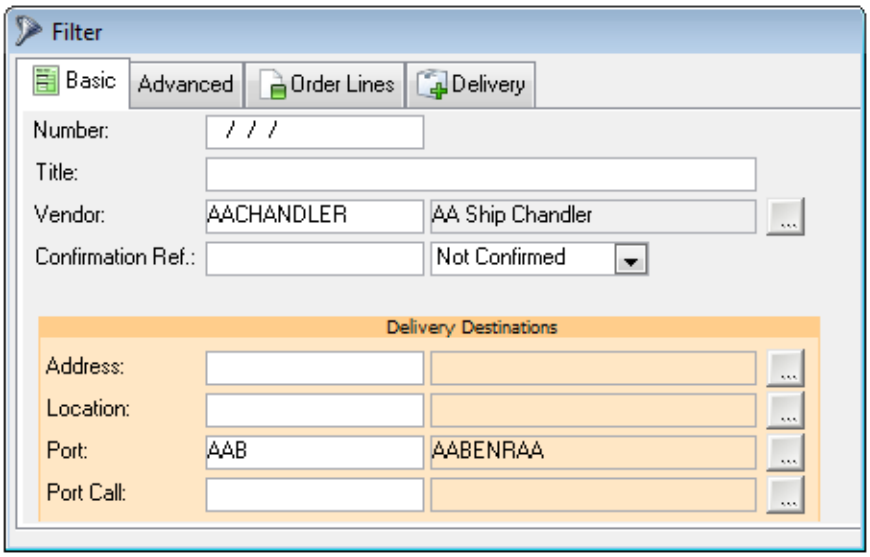
- A **Private** configuration will only apply to the person who created it, the logged-in user.
- A **Group** configuration will apply to one or more user groups.
- A **System** configuration will apply system-wide to any logged-in user.

It is possible to create predefined filter configurations that conflict with each other. For example, if there is a predefined filter configuration on the Forms filter for a user group, but one of the users in that group also has a private predefined filter configuration for the same filter, which of these two will AMOS use? In this case, configurations with private scope receive first priority; then those with scope set to group, and then system.

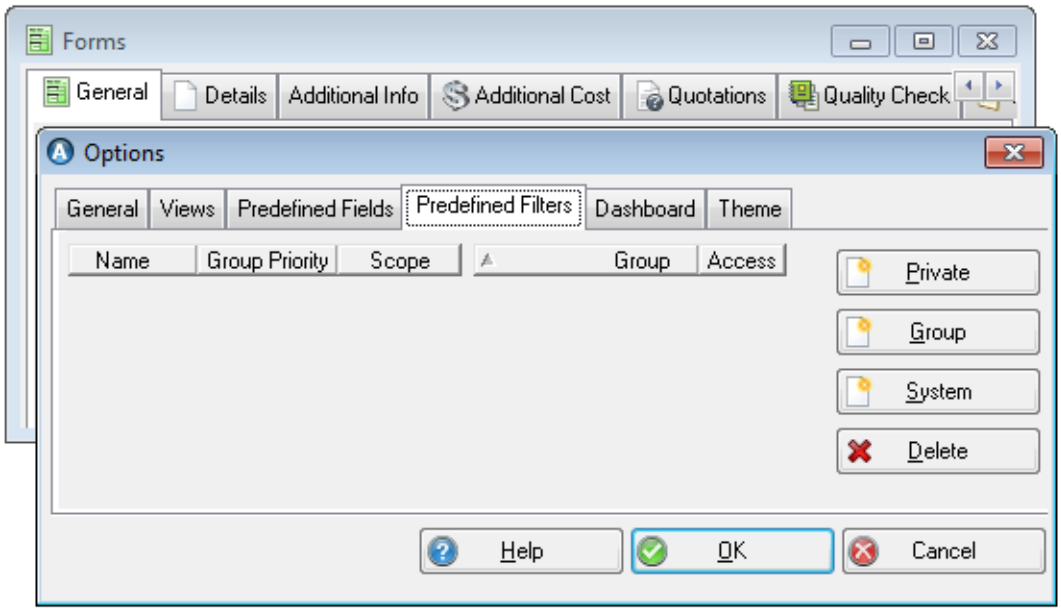
[1]The scope you are allowed to select for a predefined field configuration depends on your access rights.
[2]Your access rights determine if you are allowed to add or remove Groups from the Access list for Group predefined field configurations.

12.4.1 Creating A New Predefined Filter Configuration

1. Open a filter, like **Purchase > Forms**.
2. Set the filter criteria as you wish to save it - for example: choose the **Vendor** to search on, **Confirmation**, **Port** , **Form State**, etc:



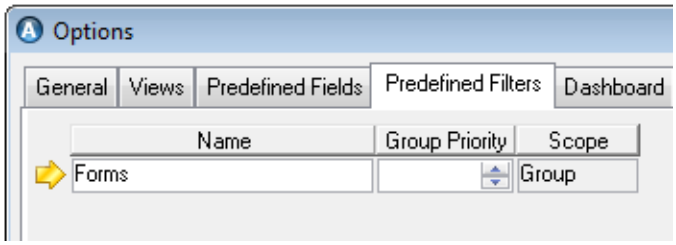
3. Click **OK** in the filter to open the window.
4. From the active window, go to **Tools > Options** and open the Predefined Filters tab:



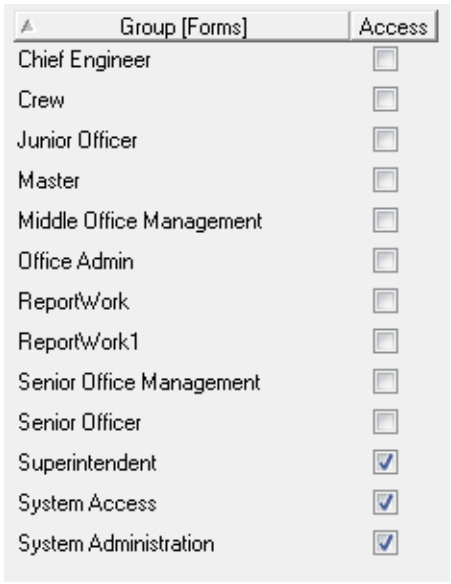
Click one of the three buttons to define the configuration's scope[1] : **Private**, **Group** or

[1]The scope you are allowed to select for a predefined filter configuration depends on your access rights.

System. The filter **Name** and **Scope** are added to the left side of the tab:



5. If you created a Group predefined filter configuration, flag the user groups[1] in the **Access** column to assign access to this configuration:



6. Click **OK**. The next time AMOS is started up the predefined filter configuration will apply in the designated window's filter, according to its scope and the identity of the logged-in user. A filter with predefined content can be changed at any time, but will revert to the saved definition the next time it is opened.

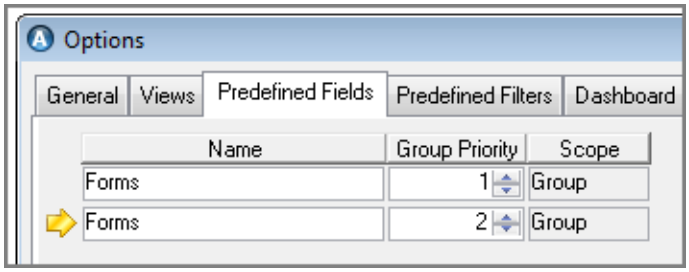
NOTE: Predefined filters have limitations when content referenced in the filter is shared differently between departments. For example this includes but is not limited to work flow definitions which are not shared globally.

12.5 Group Priority On Predefined Fields And Filters

If a user belongs to more than one group and each of these groups has access to a different predefined field/predefined filter configuration for the same window, which one does AMOS use?

In cases of conflict AMOS will use the predefined field/filter configuration with the highest **Group Priority**:

[1]Your access rights determine if you are allowed to add or remove Groups from the Access list for Group predefined field configurations.



Configurations with private scope always receive first priority; then those with scope set to group - according to the group priority if any conflict exists. System scope configurations are given the lowest level of priority.

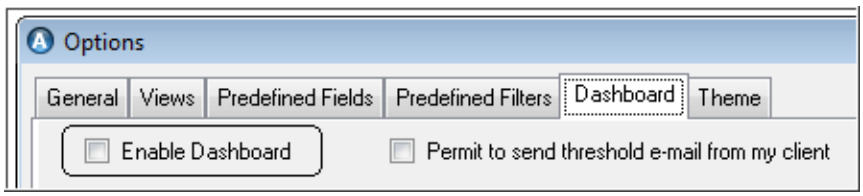
12.6 Options - Dashboard

AMOS Business Suite opens to a customisable Home Page, or Dashboard. You can add convenient information to the dashboard like alerts and work flow notifications. Settings apply to the currently logged in user only.

12.6.1 Enable, Disable And View The Dashboard

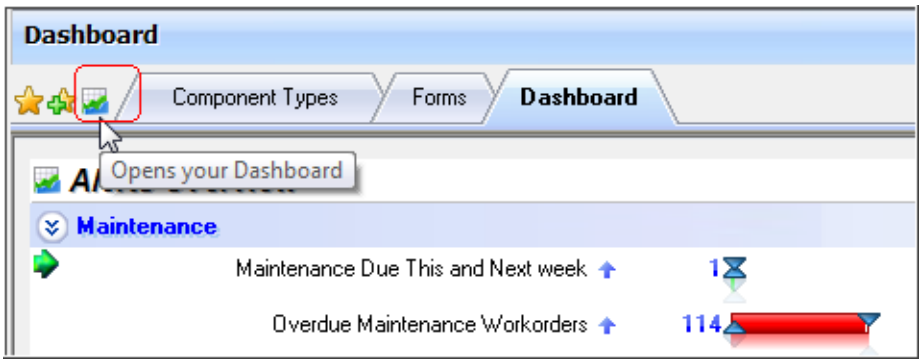
To switch the dashboard on and off:

1. Go to **Tools > Options**. Open the Dashboard tab:



2. Check or clear the **Enable Dashboard** checkbox.
3. Click **OK** to close the window and apply your setting.

When the task bar is enabled you will see a dashboard icon/tab on the task bar:

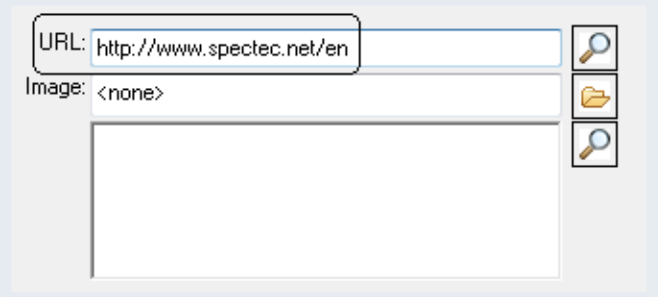


When other windows are open, clicking the dashboard icon/tab on the task bar returns the dashboard to the front of your screen, leaving the other windows open underneath.

12.6.2 Showing A Webpage Or An Image On The Dashboard

To show a webpage on your dashboard:

1. Go to **Tools > Options...**. Open the Dashboard tab.
2. Copy and paste the link to your website in the **URL** field:



3. Click **OK** to exit the dialog. The page will appear in the bottom right corner of the dashboard when you are the logged in user. Remove the webpage at any time by clearing the **URL** field.
4. Using these two buttons on the toolbar:

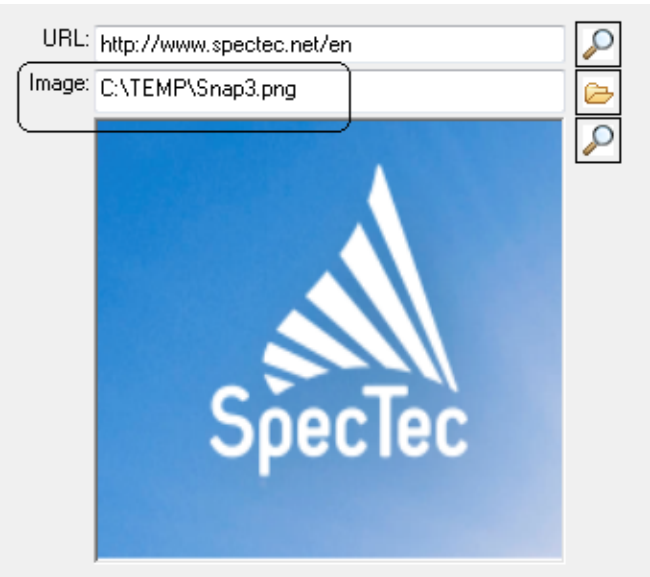
   move the webpage to the right side lengthwise, or

   back to the bottom.

   You can also expand or shrink the space the webpage takes by clicking on the side or top and dragging it.

To add an image to your dashboard:

1. Go to **Tools > Options...**. Open the Dashboard tab.
2. Browse to and select an **Image** file in your system:



3. Click **OK** to exit the dialog. The image will appear in the top left corner of the dashboard when you are the logged in user. Remove the image at any time by clearing the **Image** field.

12.6.3 Enabling Alerts On Your Dashboard

The Options window Dashboard tab contains a list of the defined alerts[1] that are currently available in the system. Some alert groups may be set to appear on your dashboard automatically. These are mandatory and will appear regardless of whether you select or deselect them in the Options window. See section 19.1.

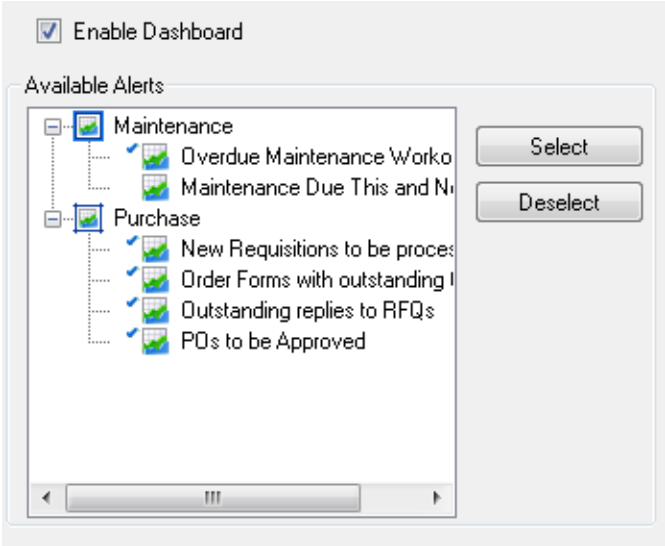
To display a defined alert on your dashboard:

[1]Alerts will only appear in the list if your user group has Read access assigned to them.

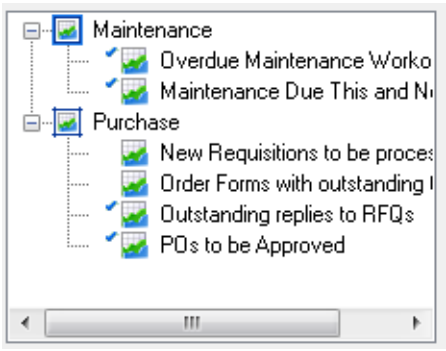
1. Go to **Tools > Options.** Open the Dashboard tab.

   If the dashboard is not already enabled, flag the **Enable Dashboard** checkbox.

2. Expand the **Available Alerts** list:



3. To select an entire group of alerts, click on the root and click the **Select** button. Otherwise, click on a single alert and click **Select**:



   A small blue check appears next to any selected alert; to remove an alert click on it and click the **Deselect** button.

4. Click **OK** in the Options window. The next time you start AMOS, the alerts will appear you selected will appear on your dashboard.

12.6.4 Alert Gauge

It is also possible to display a gauge alongside the alert bars, with numbers on a dial visualising the alert values. This gauge is switched on or off in the Options window Dashboard tab:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Enable the alert gauge by checking the **Show Alert Gauge** checkbox.
4. Click **OK** to close the dialog.

5. A gauge with a blue and a red indicator will appear on your dashboard.

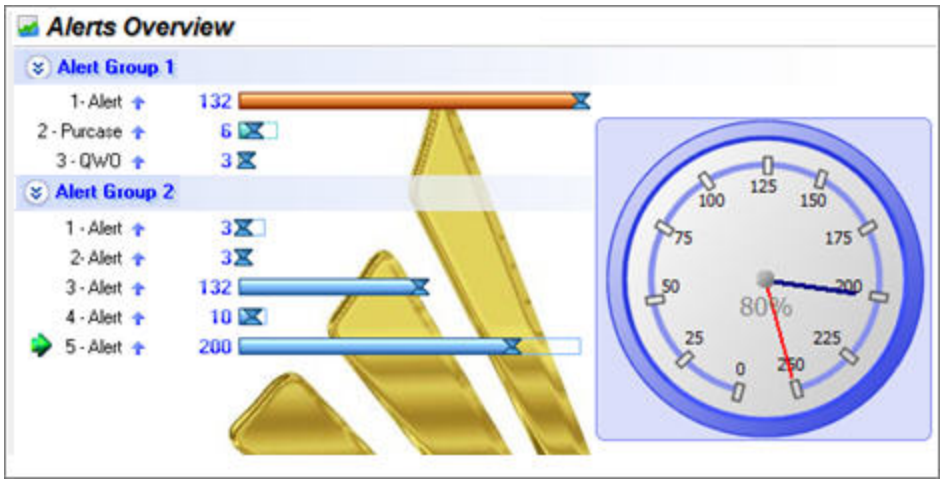


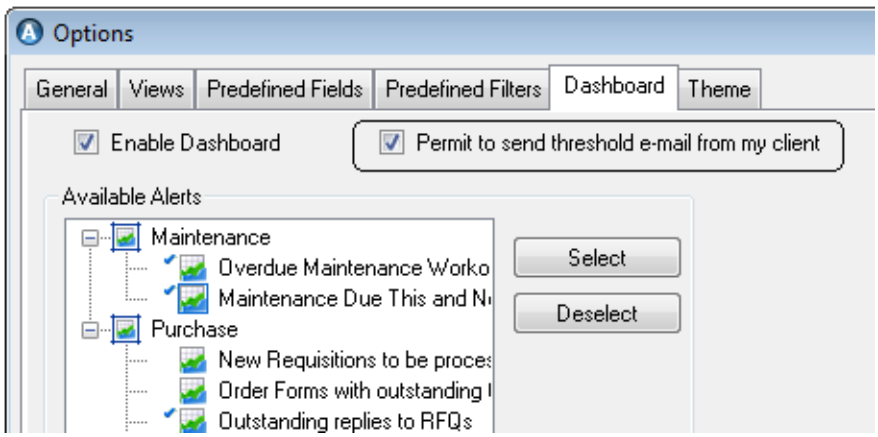
Figure 73 A sample of Alerts, thresholds and a gauge

The blue indicator represents the value of the currently selected alert. The red indicator represents the threshold value of the currently selected alert.

12.6.5 Sending Threshold Notifications

Dashboard alert definitions may include a threshold, and an email notification to be sent if the threshold is crossed:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Flag the **Permit to send threshold email from my client** checkbox:



4. Click **OK**.

If a threshold is crossed emails will be sent to the users selected on the alert's threshold definition. Before sending an email AMOS will check if a mail for this alert has already been sent from another logged in user with an active dashboard displaying the same alert.

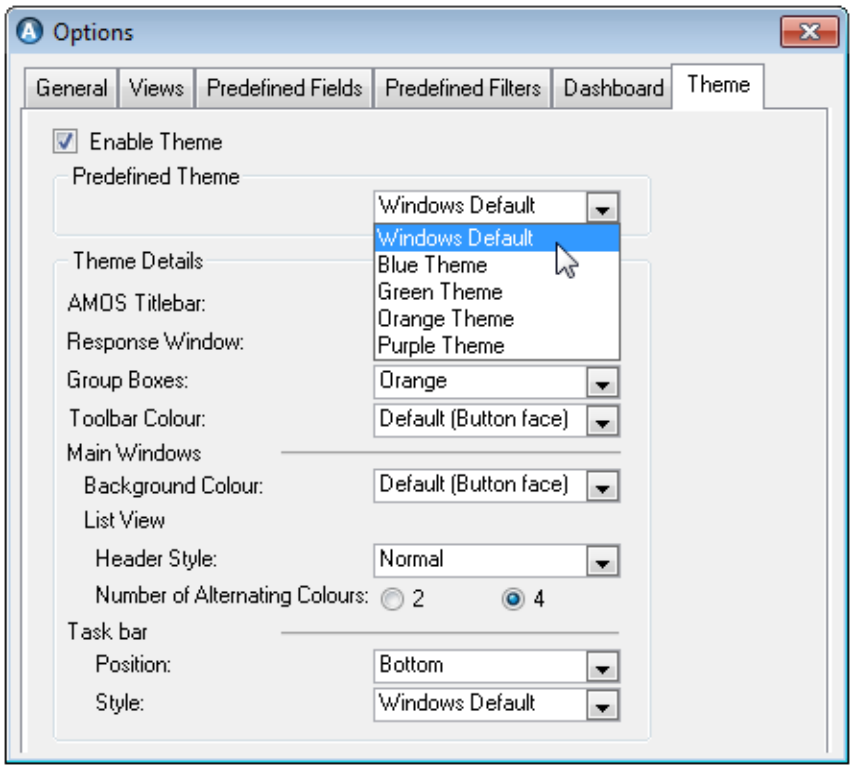
The threshold and the email notification must already be defined on the alert itself for this setting to take effect. See section 19.2.3.

12.7 Options - Theme

Tailor the appearance of certain aspects of AMOS using predefined or customised themes. Settings apply to the currently logged in user only.

To select and activate a theme:

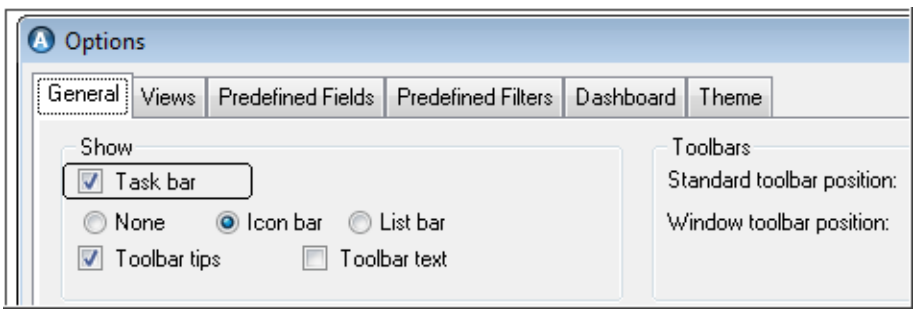
1. Go to **Tools > Options**. Open the Theme tab.
2. Flag **Enable Theme** and select one from the **Predefined Theme** list:



3. Set your own customisations in terms of colour and style in the Theme Details area of the dialog.
4. Click **OK**. You may need to restart AMOS to see your settings take effect.

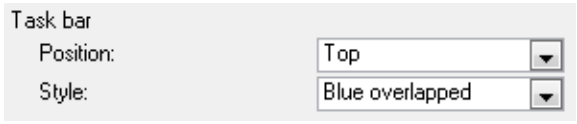
Task Bar Appearance

If the **Task bar** option is flagged on the Options window General tab:

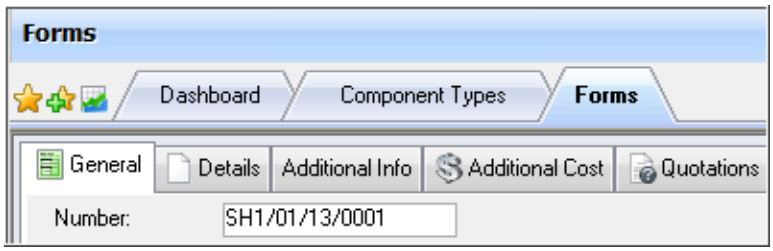


You can configure its appearance and position:

1. Open the Theme tab and select a **Position** and **Style** for the task bar:



2. Click **OK** to leave the dialog and you will see the task bar appear as defined:



CHAPTER 13 Users, Groups And Access Control

When a user logs into AMOS Business Suite, a database user called AMOS is automatically used behind the scenes. This accesses the table of application users to check that the user logging in has a valid password.

Each AMOS user receives a User ID and a password. Users are then assigned to Groups, whose access rights determine which modules the users in the group can see and use. Every user ID must belong to one or more groups. A user not assigned to any group, will not be able to use the system.

This Chapter covers the management of users, groups and access rights configurations:

1. Create user IDs in the Users window. See section 13.1.
2. Create groups and assign each user to one or more. See section 13.2.
3. Assign access rights to the user groups. See section 13.4.
4. Fine tune access levels throughout the system for each user group. See section 13.5.
5. (Optional) Use the Field Access window to further restrict both the visibility and editing of fields by setting access on selected fields and tabs. See section 13.6.

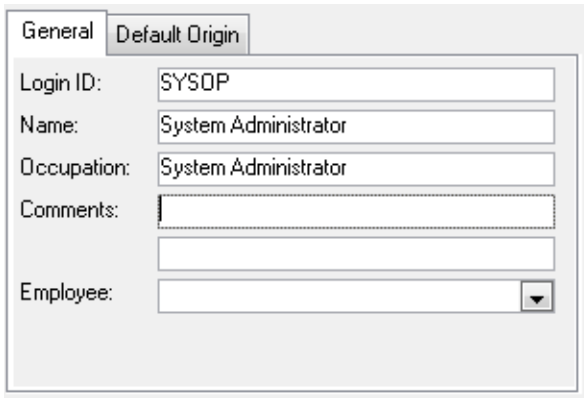
13.1 Users

Every user requires a unique login ID to access the system. Until a user is assigned to at least one user group, his/her login credentials will not be valid.

Creating a New User

To create a user:

1. Go to **Tools > Configuration > Access Control > Users**.
2. Click **New**.
3. Enter a **Login ID** and the user's **Name**.



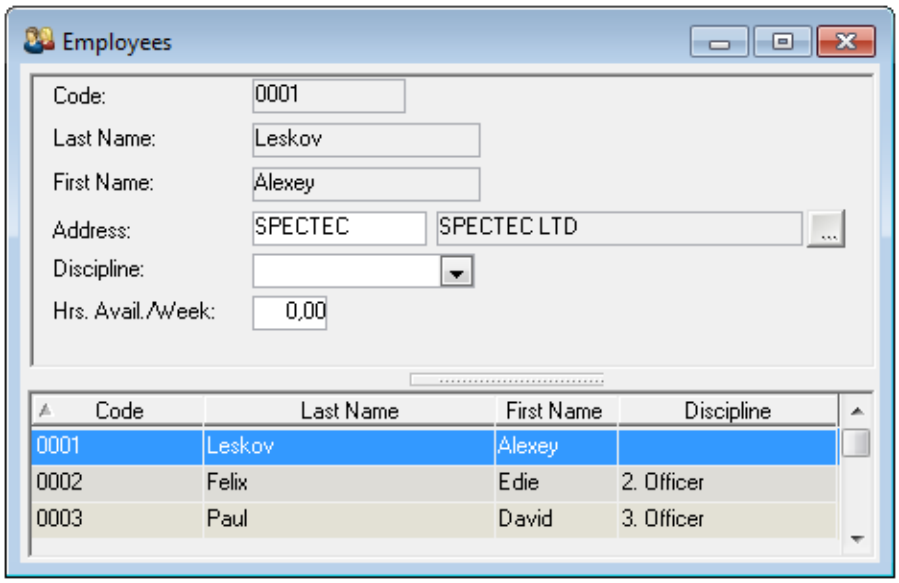
Login IDs can represent a position like Chief Engineer or Captain etc., or an individual user.

4. Enter the user's **Occupation** and any **Comments**.
5. **Save** the record.

Linking Employees and Users Together

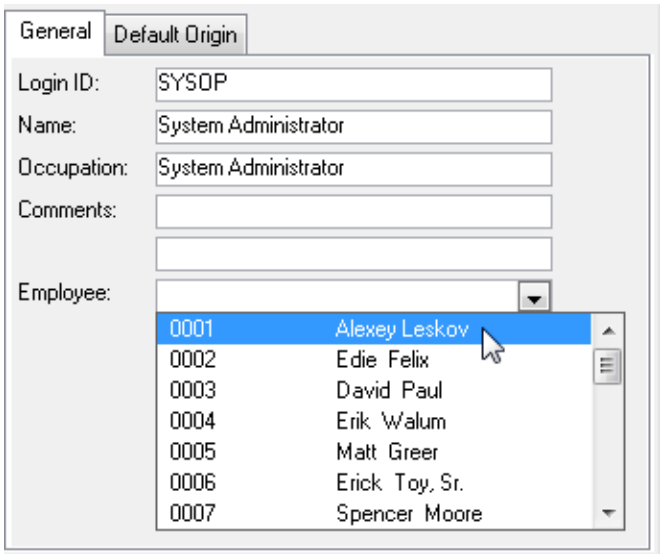
You can link an AMOS *user* record and an *employee* record together so that the system will recognise the user and the employee as the same person. To do so:

1. Open the Employees register or the **Crewing > Employee** window[1].
2. Create and **Save** an employee registration:



3. Open the Users window. Create a new or select an existing user ID.
4. Select the employee record in the **Employee** drop-down:

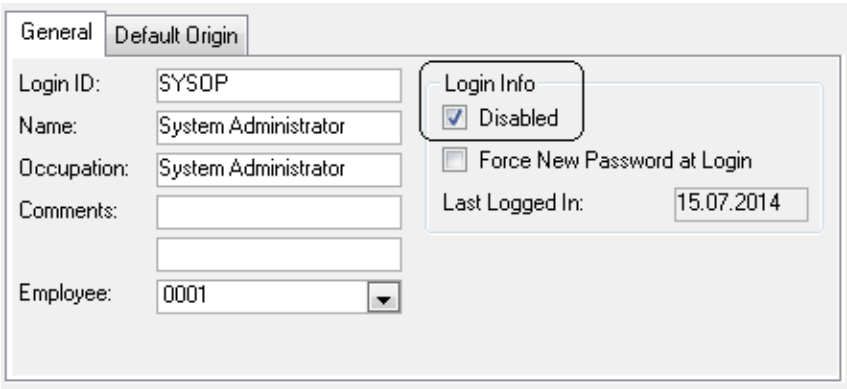
[1]The Employee window is available to users whose system license includes Crewing.



5. **Save** the window. The AMOS user details and employee details are now linked together.

Enabling/Disabling Users

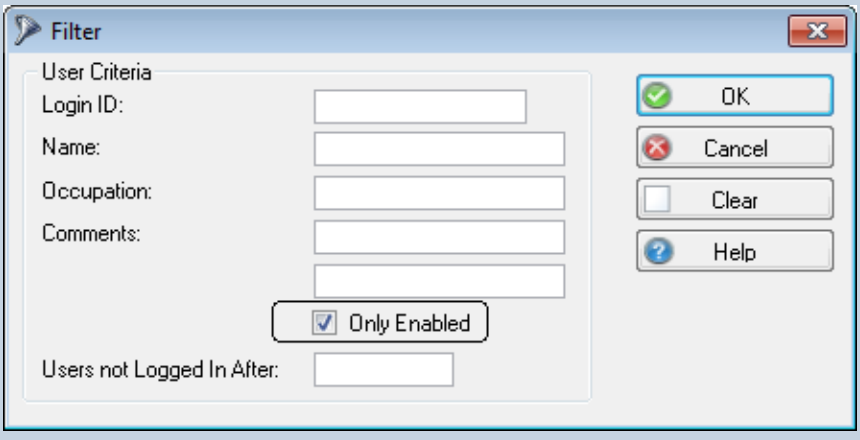
Deactivate a user and prevent him/her from accessing the system by selecting his/her user ID and flagging the **Disabled** checkbox:



This locks the user out of his/her account.

TIP

Filter the Users window by flagging the **Only Enabled** checkbox to return only those users who are currently active in the system:

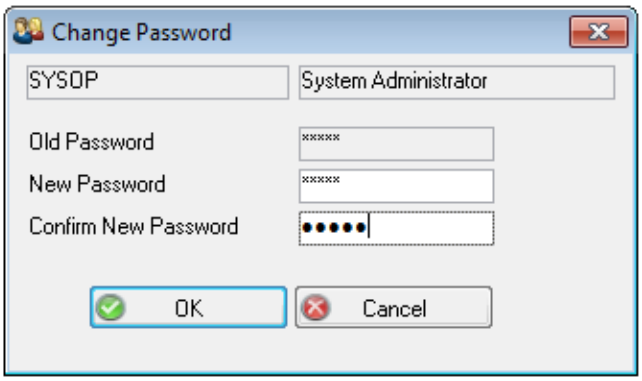


13.1.1 Passwords

Assigning/Changing a User Password

A newly created user needs a password. To assign/change a password:

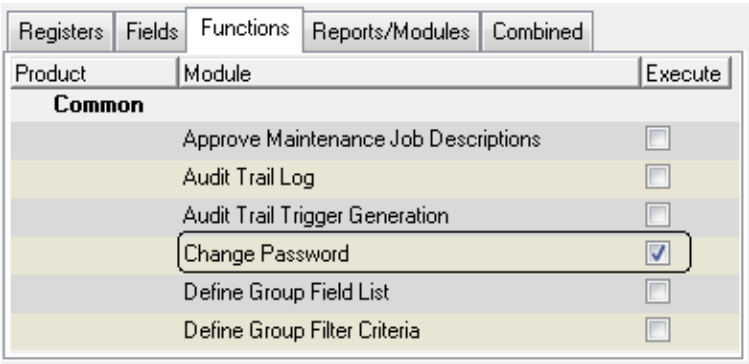
1. Open the Users window and select a user.
2. Go to **Options > Change Password**:



3. Type a password in the **New Password** field, and then **Confirm** it in the field below.
4. Click **OK** to return to the main window.
5. **Save** the user.

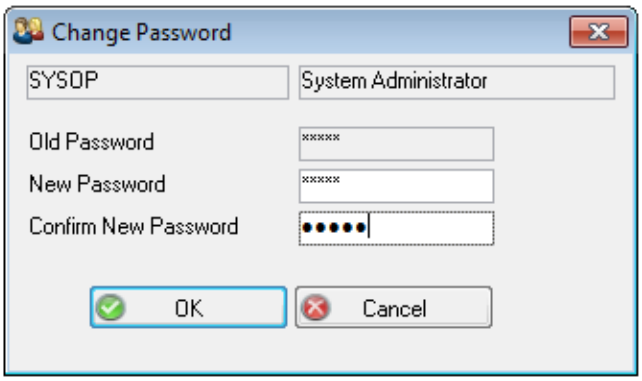
Allowing Users to Change Their Own Password

For any user to be able to change his/her own password at any time, he/she must belong to a user group which has the correct access in the Access Control window, Functions tab:



A user in a group with this access right can then change his/her own password:

1. Go to **Tools > Change Password**:

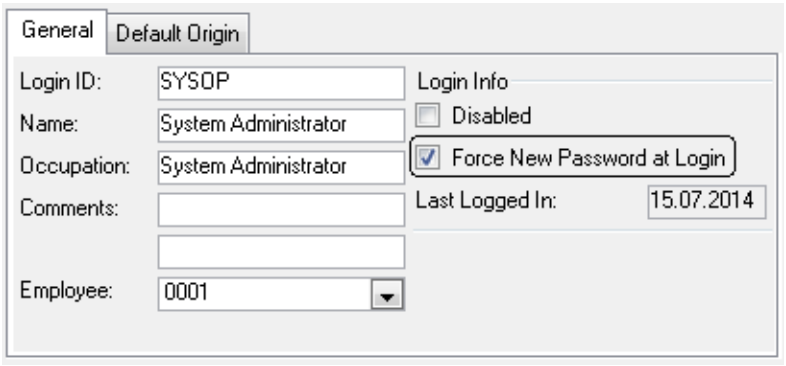


2. Type a **New Password** and **Confirm** it by entering it a second time.
3. Click **OK**. The password is now changed.

Forcing a Password Change

To require a user to change his/her password:

1. Open the Users window and select a user in the list.
2. Check the **Force New Password at Login** checkbox:



The next time this user logs in the Change Password dialog will appear, requiring him/her to change their password before they can proceed. The flag on the **Force New Password** checkbox will automatically be removed once the user has changed his/her password.

13.1.1.1 Password Parameters

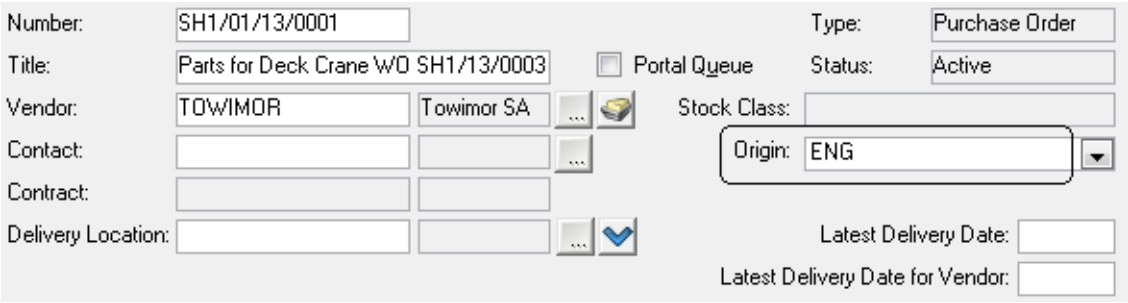
Passwords have to meet certain criteria, depending on some parameter settings. The parameters controlling passwords and system access are found at **Tools > Configuration > Parameters > Options > General > System Access >** .

- 'Enforce Complex Password' determines whether complex passwords must be used or not. If this parameter is set to TRUE, all passwords must contain certain elements like upper/lower case characters and non-/alphabetic characters.
- 'Enforce Password History' controls how many previously used passwords for each user are retained in the system. For example if the parameter is set to 2, then a user's 2 most recent passwords will not be accepted during a password change.
- 'Maximum Password Age' determines the maximum allowed age in days of all passwords.
- 'Minimum Password Length' determines the minimum number of characters acceptable in a password.

See section 14.11.3.11 for more details, and a complete list of all the system access parameters.

13.1.2 Default Origin On Purchase Forms

A purchase form in AMOS can be created for any department in the system - like 'Deck' or 'Engine'. The **Origin** field on the Forms window indicates the departmental division the selected form belongs to:



Read about setting up and applying order form origins in the *AMOS M&P User Guide*.

NOTE: Access to order form origins and default origins can be defined at group level or at user level. It is not necessary to define settings in both areas; if you do, AMOS considers the logged in user's settings at user level first and then at group level second.

Setting Default Form Origins

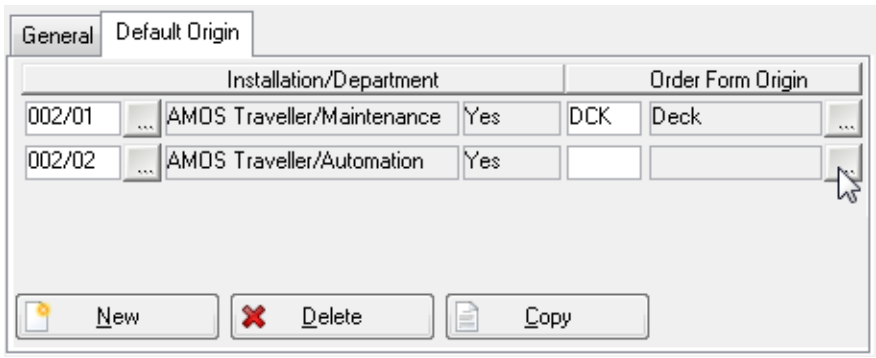
You can link order form origin values to a user ID by installation/department. Whenever that user creates a purchase form his/her 'default' origin value for the department he/she is logged into will appear on the form automatically.

EXAMPLE

The default origin at AMOS Traveller/Maintenance is set to 'Deck' for a user. The same user's default origin at AMOS Traveller/Automation is set to 'Engine'. The user logs onto AMOS Traveller/Maintenance and creates a purchase order, and the **Origin** field on the form is automatically set to 'Deck'.

To set default form origins[1]:

1. Open the Users window and select a user. Open the Default Origin tab.
2. Click the **New** button inside the tab.
3. Select an **Installation/Department**. User access to that installation/department is indicated by a 'Yes' or 'No':



4. Choose a departmental division at each Installation/Department, with the **Order Form Origin** lookup.

[1]Setting default origins requires that a list of available origins has been defined in the register at File > Open Register > Purchase > Order Form Origin. See the *AMOS M&P User Guide*.

> **TIP**
>
> Use the **Copy** button and then **Options > Paste Origin** to apply a list of origins to another user.

5. **Save** the window.

If you do not set any default origins at user level, AMOS will look for a definition at group level. If no origin is set on the group either, or the user belongs to more than one group and has no user-level default, the origin on newly created order forms will be left blank.

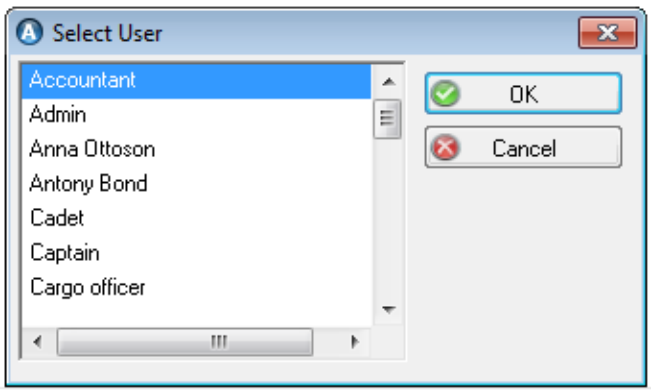
As soon as you have assigned one or more origins to a user or his/her group, he/she can only edit forms coming from those origins, as well any forms without an origin assigned. To edit any purchase form regardless of origin, users must belong to a group with access to 'Allow editing forms of all origin' on the Access Control window Functions tab.

Users can change the origin on a form to another origin they have access to.

13.1.3 Moving User References

To clean up the list of users in a database:

1. Open the Users window and select a user to remove.
2. Go to **Options > Move User References**. Select another user to move the first user's references to:

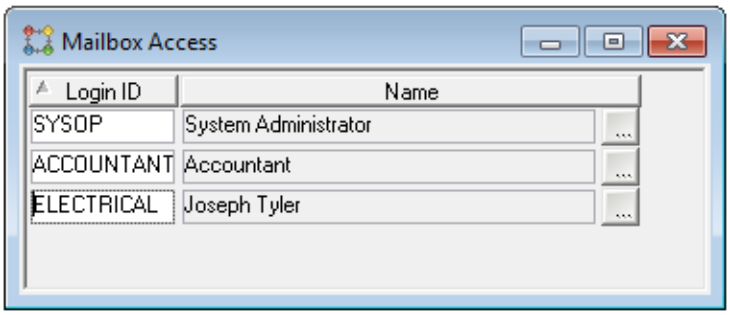


3. Click **OK** to return to the main window. Delete or disable the first-selected user.
4. **Save** the changes.

13.1.4 Mailbox Access

To add users to group or departmental mailboxes:

1. Open the Users window and select a user.
2. Go to **Options > Mailbox Access**. Any mailboxes already assigned to the selected user will appear in a list.
3. Click **New** on the toolbar and lookup a **Login ID** and **Name**.



This gives the first-selected user access to that user's mailbox. To remove any mailbox from the list, select it and click **Delete**.

4. **Save** and close the window.

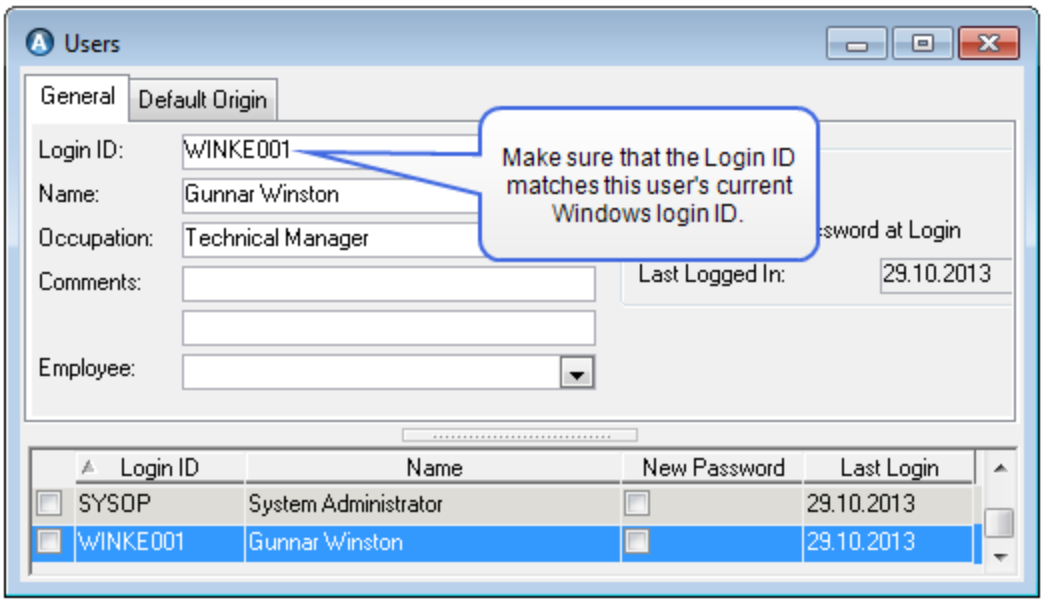
When the parameter 'Use Work Flow' is set to TRUE, filters in windows using work flow will contain the selection 'All Accessible'. Selecting it allows users to see the work flow objects that have been assigned to them as well as any work flow objects assigned to any users they are allowed mailbox access to.

13.1.5 Logging On With Windows Credentials

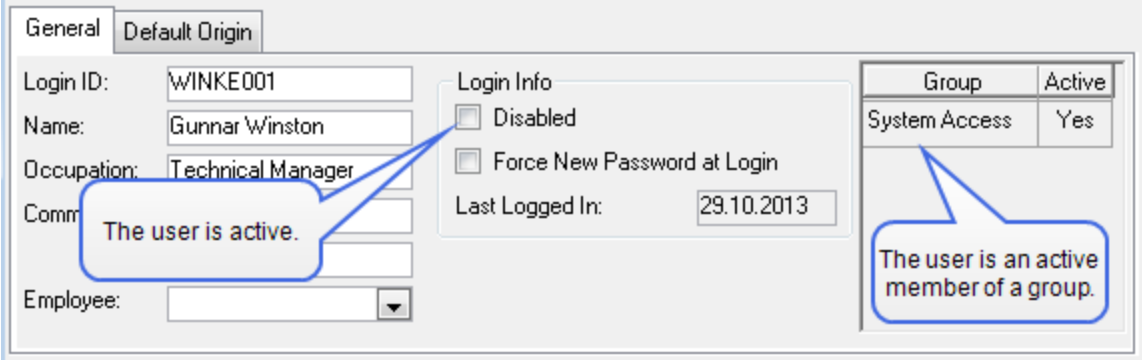
There is a system parameter setting in AMOS which will let users log in to AMOS Business Suite using their Windows login credentials instead of separate, dedicated AMOS credentials. This limits the number of passwords users need to remember and also lets the system administrator centrally define which users can take advantage of this functionality. There are just a few steps:

1. Create an AMOS user whose AMOS Login ID matches their Windows ID.
2. Set the parameter to allow Windows Login credentials.
3. The user logs in with their Windows credentials and their AMOS password is updated.

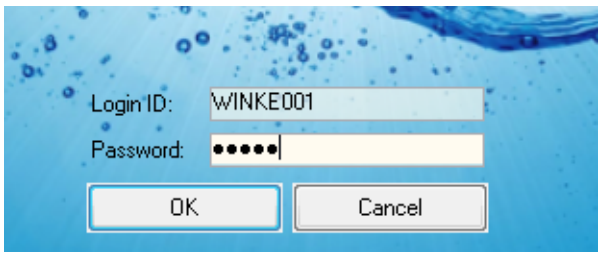
Create one or more users in AMOS with an AMOS **Login ID** which matches their current Windows login name. Or, change an existing user's **Login ID** to match their Windows name:



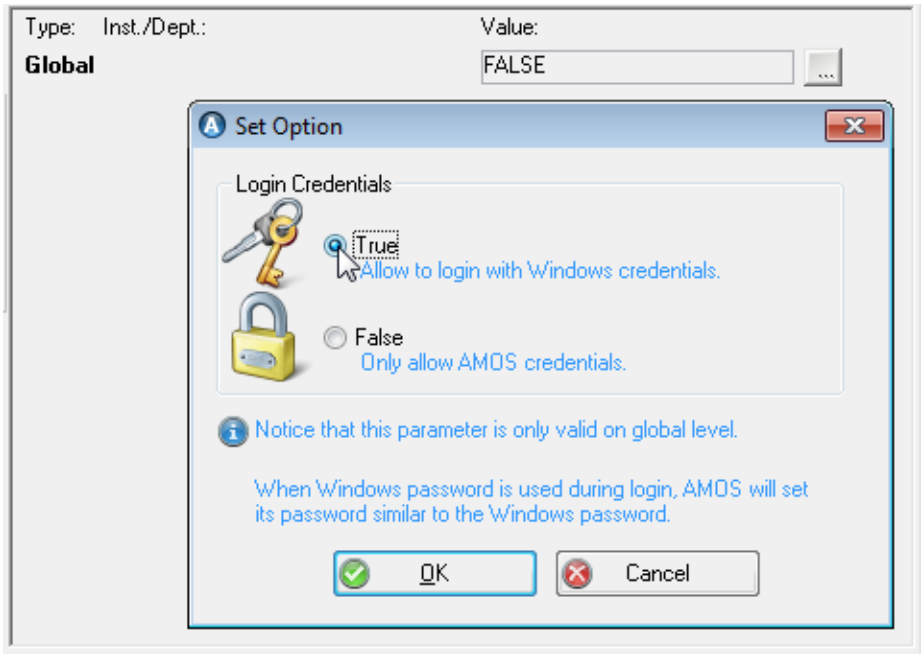
Make sure each user is active, has a password[1] and is a member of a group[2]:



This user can now login to AMOS using his Windows name and his current AMOS password:



Go to **Tools > Configuration > Parameters > Options > General > System Access >** 'Allow Windows Login Verification'. This parameter is set by default to FALSE, meaning only the user name and password defined in AMOS will be accepted at login. Change the setting to TRUE[3]:



Now, any user with their AMOS **Login ID** set to match their Windows login ID, can enter their Windows password to log onto AMOS.

[1] If you created a new user, specify a password at Options > Change Password. Manually changing an existing password to the user's Windows password is not necessary.
[2] The user group requires Execute access to 'Allows Windows Login Verification' on the Access Control window Functions tab.
[3] Note that this parameter setting is valid only at Global level.

TIP

Alternatively, you can leave the parameter set to FALSE, preventing global usage of the Windows login functionality and set access at user group level instead. Go to **Tools > Configuration > Access Control > Groups** and select a user group. Go to **Options > Access Control**, open the Functions tab and flag the 'Allow Windows Login Verification' entry under the Common grouping.

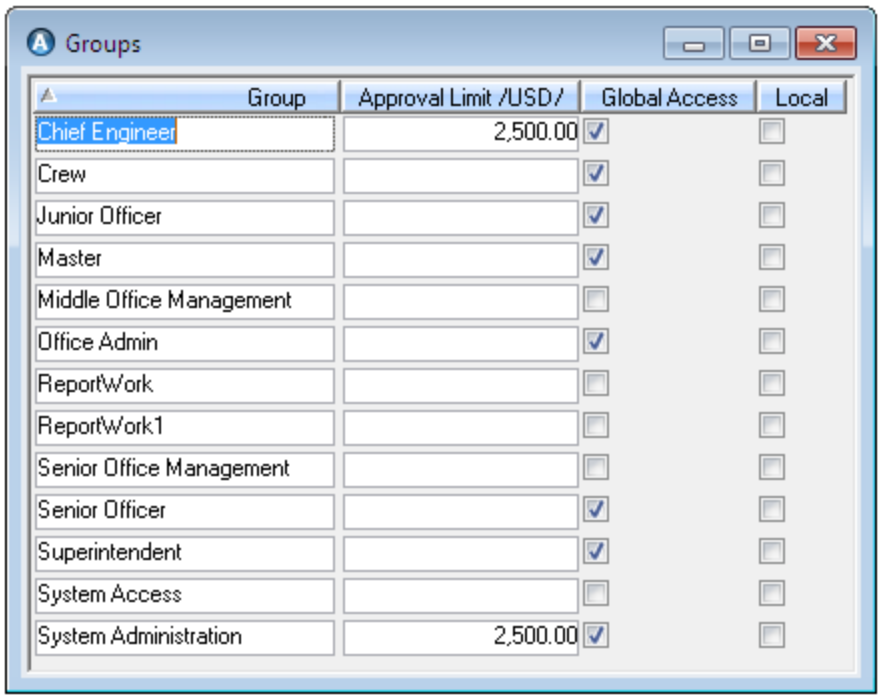
AMOS will verify that the Windows credentials are allowed and correct, and let the user in. At this point, AMOS automatically updates the user's AMOS password to the Windows one he/she just provided.

13.2 Groups

Every AMOS user must belong to one or more user groups. Access rights are assigned to these groups and so, a user's access to the system is determined by the group(s) he/she belongs to.

To create a new group:

1. Go to **Tools > Configuration > Access Control > Groups**:



2. Click the **New** button and enter a name for the group.
3. Click in the **Approval Limit** field to get a drop-down and select a limit. See section 13.3.1 for more information.
4. **Save** the new group.

Global Access versus Department Access

Flag the **Global Access** checkbox next to a group to give that group access to all defined installations and departments in the system. Once flagged, you cannot assign or remove access to selected departments: **Options > Department Access** is not available.

Otherwise, to limit a group's access to selected departments:

1. Select the group. Do not flag **Global Access**.
2. Go to **Options > Department Access**.
3. Flag the departments the group can access.
4. **Save**and close the window to return to the main Groups window.

NOTE: Another way to limit department access for users in any group is to take away their ability to switch departments (unflag the 'Switch Department' setting in the Access Control window > Functions tab). This limits them either to the 'Start In Department' or the department(s) they have access to via the command line parameters.

Local Access

The **Local** checkbox determines whether the access rights set for a group are local to the installation you are at, or not.

EXAMPLE

Using this setting lets you assign access rights at the office site that are different from the rights at the remote sites: a user group might have the ability to create requisitions while working at a remote site, but not at the office.

Your Export Selection Scripts must be modified to accommodate the changes if you want to use this setting:

1. Start by modifying the Office Export Selection Script for the table sys_access.

   The replication rule for the sys_access table states:

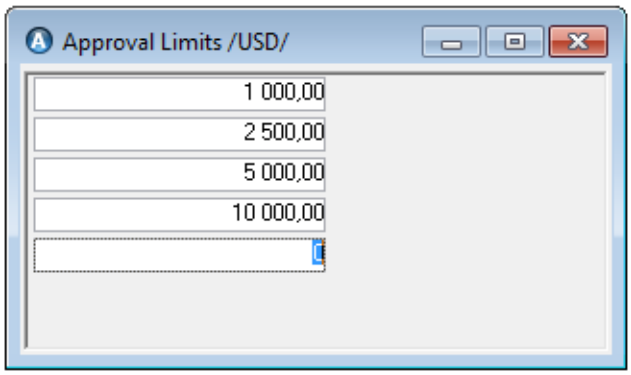
   ```
   Register sys_access If
   (Sys_Group_ID In
   (Select Sys_Group_ID From Amos.Sys_Groups Where LocalGroup = 0))
   ```

   This tells AMOS to export access rights only for groups which are not 'Local' - that is, where the sys_groups.LocalGroup field is 0. AMOS will not export access rights for any group where the **Local** column IS flagged.
2. To apply a set of access rights at a remote site, set the rights for a group but leave the **Local** checkbox *unflagged*. Then, adjust the access rights for this group to the rights you want the group members to have at the remote site.
3. Export the information as per standard export procedures.
4. Once the export is complete, adjust the access rights to what they should be at the office site. This time, flag the **Local** checkbox. This sets the field sys_groups.LocalGroup to 1.
5. As per the Export Selection Script, the access rights will not export.

13.3.1 Groups And Approval Limits

Using approval limits you can define the maximum amount any member of a given user group is allowed to approve. First, define the limits in the Approval Limits register:

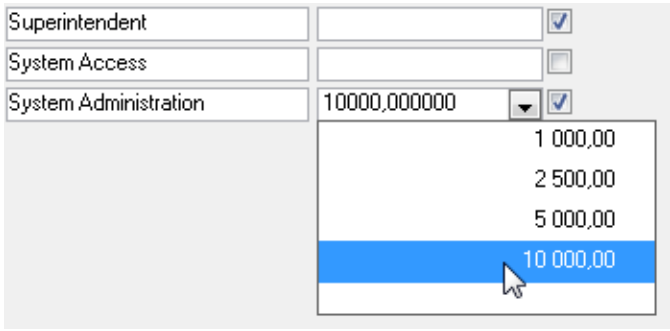
1. Go to **Tools > Configuration > Access Control > Approval Limits**.
2. Click **New** on the toolbar and enter a value. Approval limits are expressed in your base currency by default.



3. **Save** and close the window.

Then, assign a limit to each group in the list:

1. Open the Groups window.
2. Click in the **Approval Limit** field next to a group and select a limit:



3. **Save** the group.

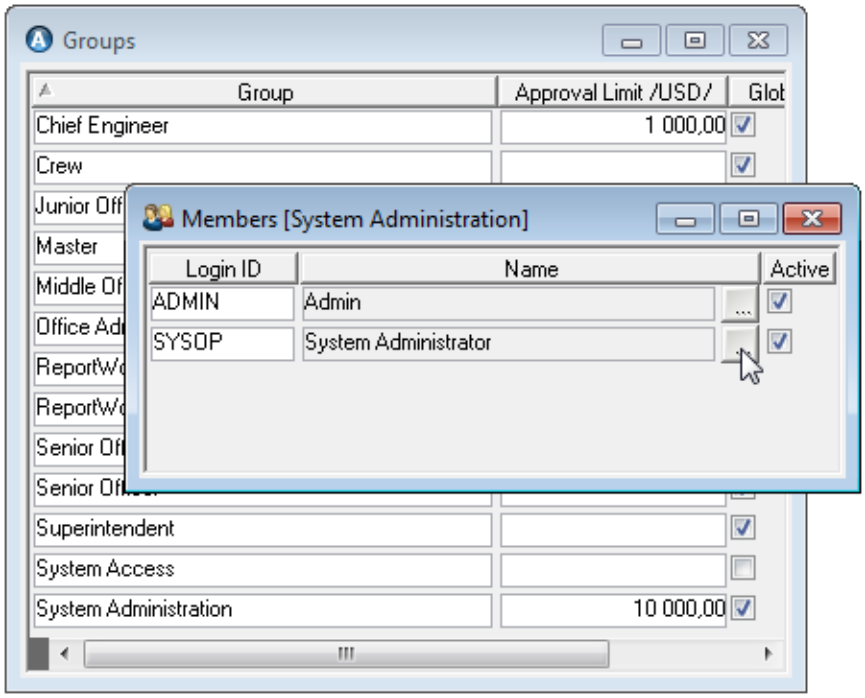
Approval limits apply to groups and not to individual users. Any user can approve purchases at a level less than or equal to their group's approval limit. If the same user belongs to several groups, then the highest approval limit of all those groups is the one that applies to the user.

13.3.2 Adding Users To Groups

Every user must belong to at least one group in order to access the system.

To add a user to a group:

1. Open the Groups window and select a group to add members to.
2. Go to **Options > Members**:



3. Click **New**. Lookup and select a user.
4. **Active** is flagged by default and indicates that the user is a current group member.

   You can temporarily restrict access by unchecking the **Active** box[1]. This deactivates the user within the selected group *only*: to disable the user system-wide, check the **Disabled** box in the User window.
5. **Save** the window.

To remove a member,select the group and open the Members window. Delete the user's name or unflag the **Active** checkbox. The user will no longer have that group's access rights.

The groups a user belongs to are shown in the Users window:



It's possible to activate or deactivate a user's group membership on the Users window too, by flagging or unflagging the **Active** checkbox there. The checkbox setting applies for the corresponding group only, and changing it in the Users window will update the Members window and vice versa.

[1]The groups a user belongs to will also appear on the Users window. The same 'Active' checkbox is available there and flagging/unflagging it will activate/deactivate the user within the selected group only. Changing the setting of the checkbox on either window updates the other.

13.4 Setting Group Access Rights

Each AMOS user's access to the system is determined by the group(s) he/she belongs to. Access rights are configured from the Groups window.

13.4.1 Job Class Access

When job class access is applied to a user group, the group's members will be able to see job classes, job descriptions and work orders, but will only be able to report work against jobs belonging to the classes flagged for their group:

1. Select a group in the Groups window.
2. Go to **Options > Job Class Access**.
3. Check the boxes beside the classes you want this group to have access to.
4. **Save** the window.

- As soon as you flag a job class, only that group's members will be able to report work against jobs belonging to the flagged class. Users from all other groups will *not* be able to report work for these jobs (unless it is added to their group's job class access list as well).
- Job classes not attached to any group will be available to all groups.

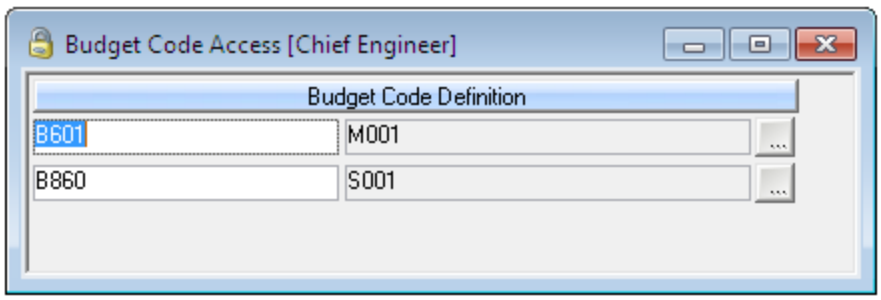
13.4.2 Budget Code Access

You do not need to set up Budget Code Access if you want all users to have access to all budget codes.

Otherwise, flagging budget codes for a group will restrict certain users from seeing certain budget codes.

To grant or restrict budget code access:

1. Select a group in the Groups window.
2. Go to **Options > Budget Code Access.**



3. Click the **New** button and lookup a budget code. This grants access to the budget code for the selected user group.
4. **Save** the window.

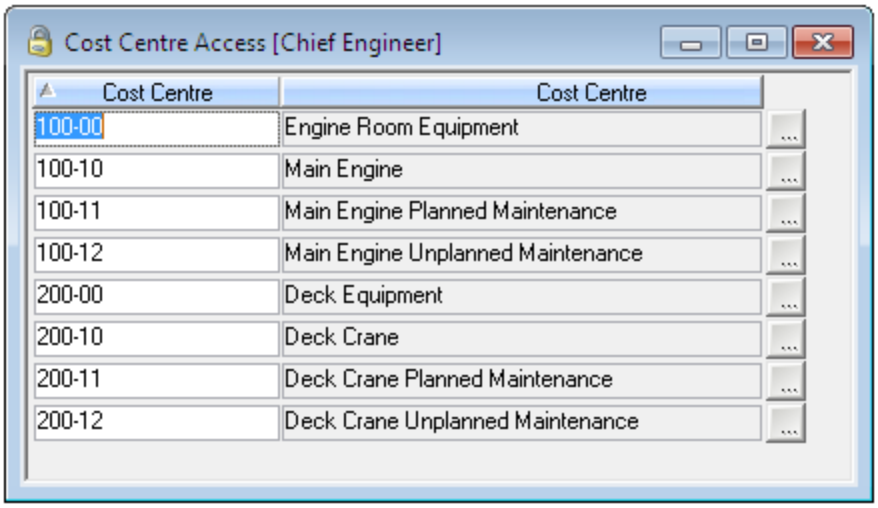
Until you start granting groups access to budget codes, all budget codes are accessible by all groups:

- If access is granted to no groups, all groups have access.
- If access is granted to all groups, all groups have access.
- If access is granted to some groups, only those specified have access. Users from all other groups will not be able to use or even see it.

13.4.3 Cost Centre Access

NOTE: The cost centre access setting is only available if your system license includes the accounting module.

Users can only access cost centres attached to their group. So if the cost centre 'Engine Room Equipment' is removed from the list in the illustration below, users in the group will not be able to access it.



To grant access to cost centres:

1. Select a group in the Groups window.
2. Go to **Options > Cost Centre Access.**
3. Click the **New** button and lookup a cost centre. This grants access to the cost centre for the selected user group.
4. **Save** the window.

13.4.4 Procedure Category Access

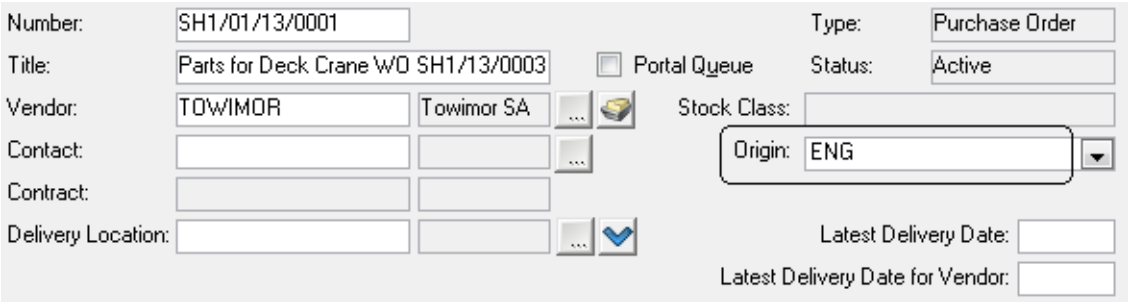
Any user group can have access to multiple procedure categories:

1. Select a group in the Groups window.
2. Go to **Options > Procedure Category Access**.
3. Click the **New** button and choose a **Category Name**.
4. Flag access rights.
5. **Save** the window.

13.4.5 Order Form Origin Access

NOTE: Access to order form origins and default origins can be defined at group level or at user level. It is not necessary to define settings in both areas; if you do, AMOS considers the logged in user's settings at user level first and then at group level second.

A purchase form in AMOS can be created for any department in the system. The **Origin** field on the Forms window indicates the departmental division the selected form belongs to:



Read about setting up and applying order form origins in the *AMOS M&P User Guide*.

When a user belongs to a group with a **Default** origin, that origin will appear on any new forms he/she creates.

To set default form origins and access:

1. Select a group in the Groups window. Go to **Options > Order Form Origin Access**.
2. The Order Form Origin Access window shows a list of available origins[1].
3. Flag the **Active** origins the group can access.
4. Flag one entry as **Default**. This origin will appear by default on forms created by users belonging to this group.
5. **Save** the settings.

If you do not set any default origins at user level, AMOS will look for a definition at group level. If no origin is set on the group either, or the user belongs to more than one group and has no user-level default, the origin on newly created order forms will be left blank.

As soon as you have assigned one or more origins to a user or his/her group, he/she can only edit forms coming from those origins, as well any forms without an origin assigned. To edit any purchase form regardless of origin, users must belong to a group with access to 'Allow editing forms of all origin' on the Access Control window Functions tab.

Users can change the origin on a form to another origin they have access to.

13.4.6 Stock Class Access

NOTE: Stock Class Access settings are only available when the parameter 'Use Stock Class Access' is set to TRUE.

1. Select a group in the Groups window.
2. Go to **Options > Stock Class Access**.
3. Click the **New** button and lookup a stock class. This gives the group access to the selected stock class.
4. **Save** the window.

- As soon as you add a stock class to a group, only that group's members will be able to see and use it. Users from all other groups will *not* be able to access that stock class (unless it is added to their group's stock class access list as well).
- Stock classes not attached to any group will be available to all groups.

[1]Setting default origins and access requires that a list of available origins has been defined in the register at File > Open Register > Purchase > Order Form Origin. Read about setting up and applying order form origins in the *AMOS M&P User Guide*.

13.4.7 Department Access

Flagging the **Global Access** checkbox in the Groups window next to a group gives the group access to all defined installations and departments in the system. Once flagged, you cannot assign or remove access to selected departments: **Options > Department Access** is not available.

To limit a group's access to selected departments:

1. Select a group. Uncheck the **Global Access** box.
2. Go to **Options > Department Access**.
3. Flag the departments the group can access.
4. **Save**and close the window to return to the main Groups window.

NOTE: Another way to limit Department Access for Users in any Group is to take away their ability to switch Departments (**Access Control window > Functions tab > Switch Department**). This limits them either to the Start In Department or the Department they have access to via the command line parameters.

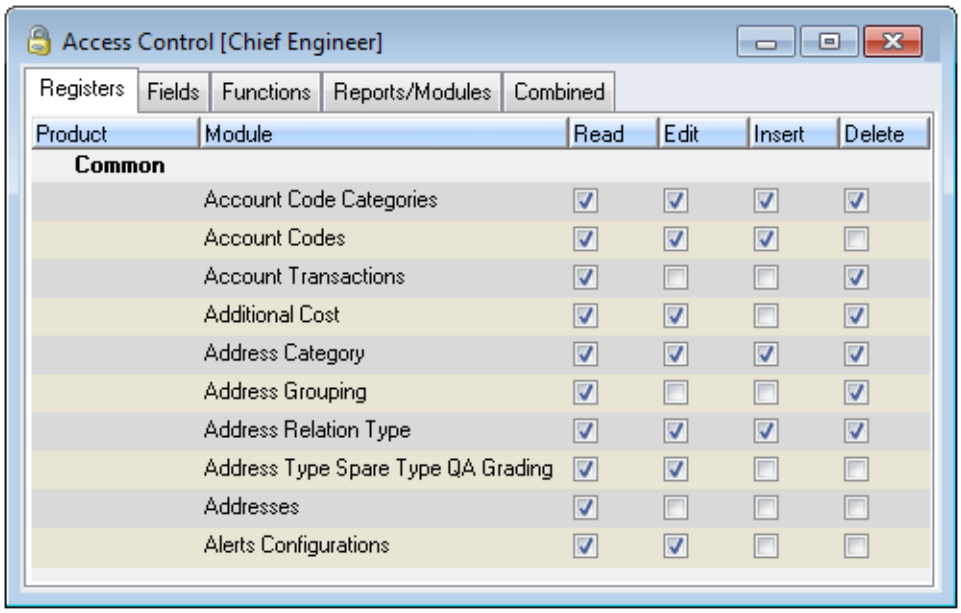
13.5 Access Control

NOTE: See Appendix C for a complete list of all the access settings available in the Access Control window Registers, Fields, Functions, and Reports/Modules tabs. The settings are listed in the same order as they appear in AMOS.

Fine tune access levels for each user group in the Access Control window[1]:

1. Select a group in the Groups window.
2. Go to **Options > Access Control**:

[1] If your system license includes the Personnel modules, the Groups > Options menu will also contain the item Access Control Personnel. This window works in the same way as the Access Control window, only in regards to Personnel module-specific registers, fields, functions and reports/modules.



3. Flag settings; **Save** and exit the window.

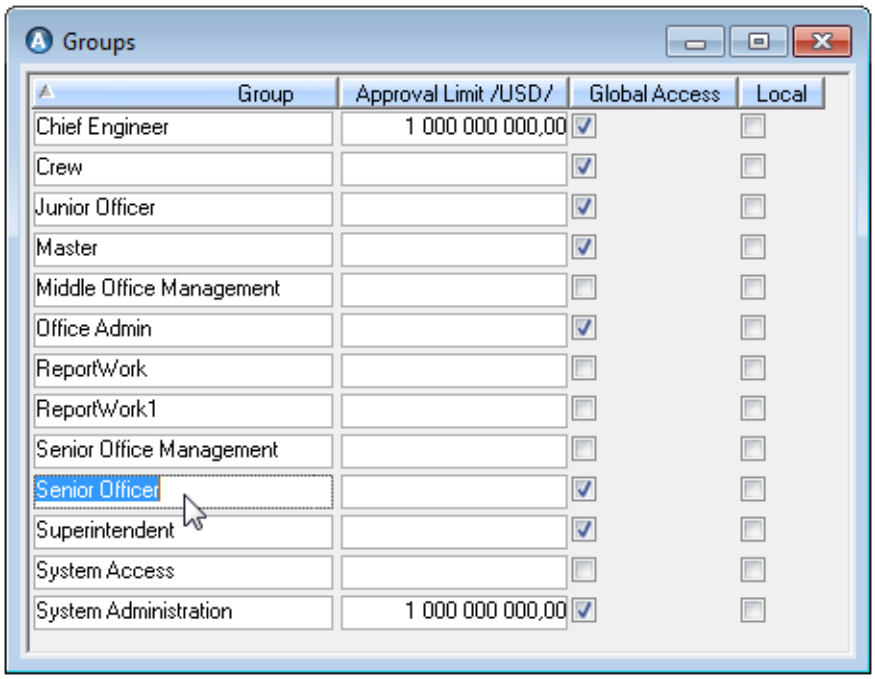
Copying Access Configurations

You can copy entire access control setting configurations from group to group; or select parts of a configuration to copy.

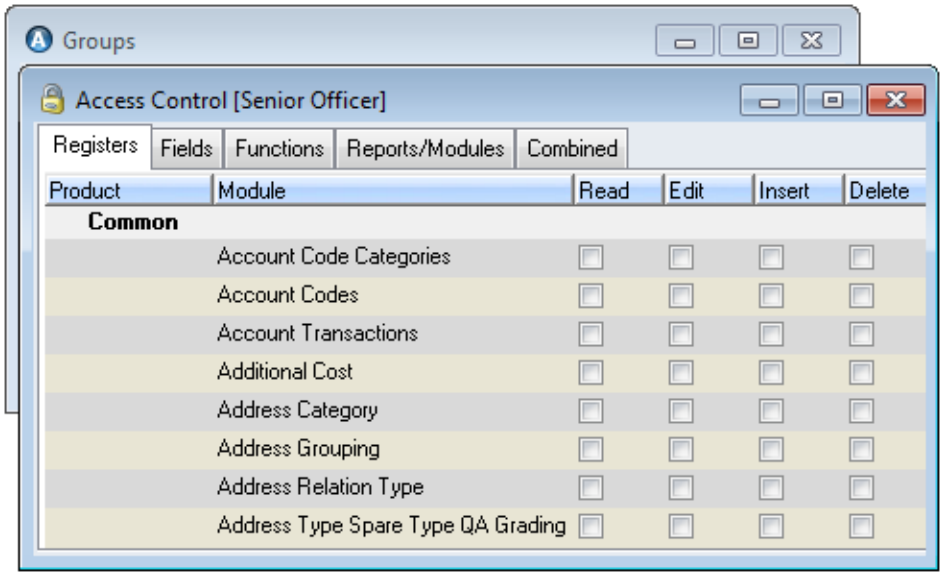
> **EXAMPLE**
>
> You have already defined the complete access control configuration for the group Chief Engineer and you want to copy the majority of these settings to the group Senior Officer.

To copy access control settings from the Chief Engineer group to the Senior Officer group:

1. Select the group to copy *to* in the Groups window - the Senior Officer group:

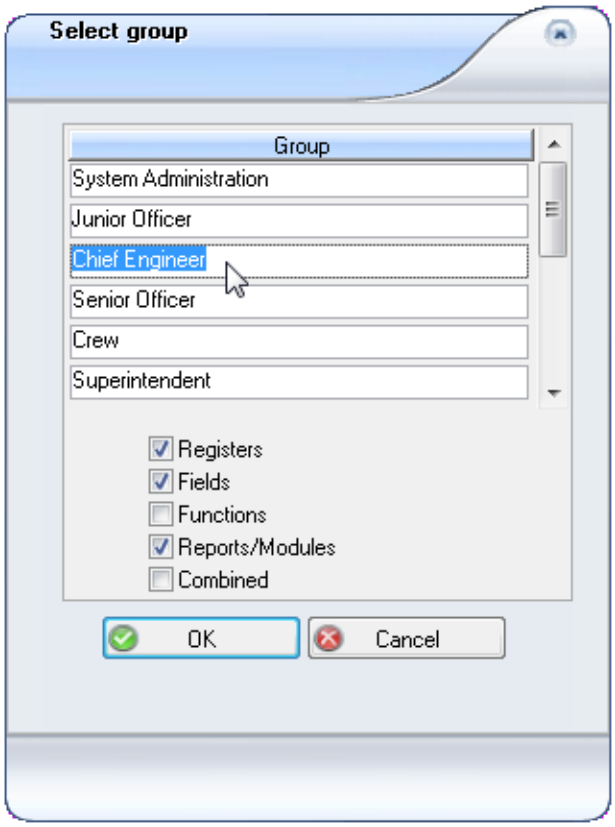


2. Go to **Options > Access Control** to open the Access Control window:



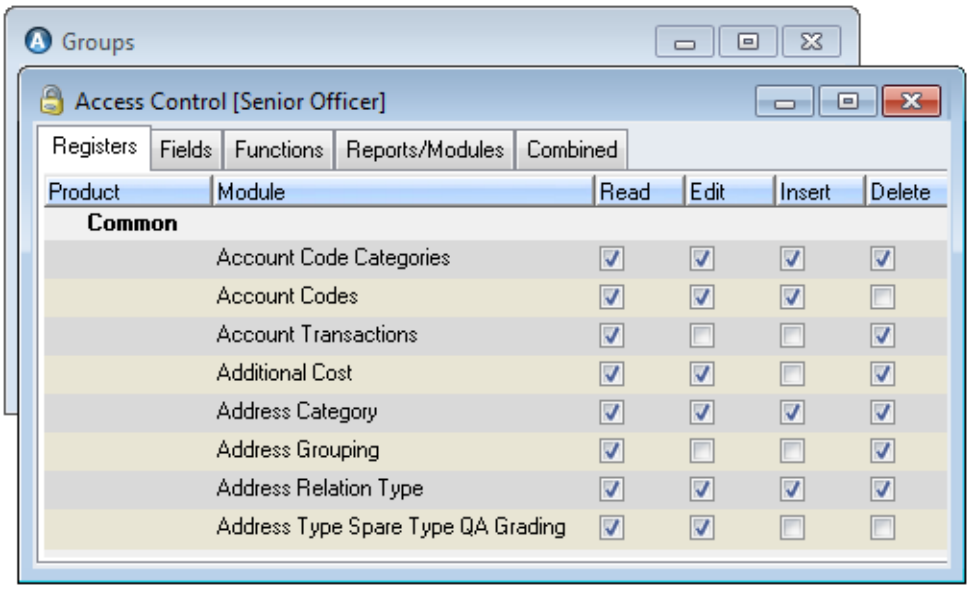
3. Go to **Options > Copy from Group**.

   A dialog containing all the groups opens. Choose the group whose rights you want to copy *from*:



   Flag the access control tabs you want to copy settings from.

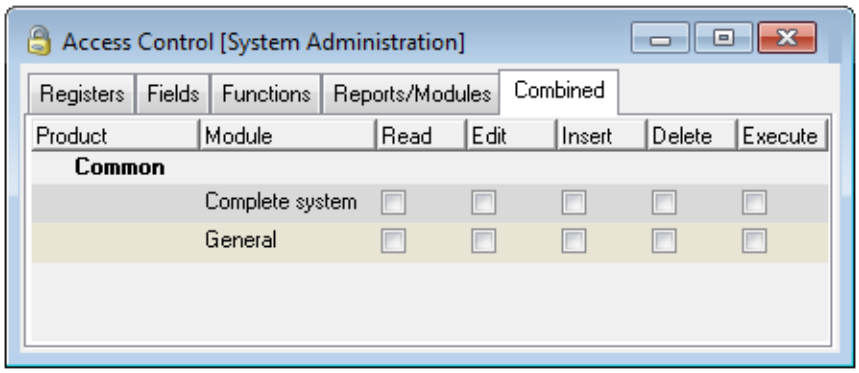
4. Click **OK**. You return to the main window and the Senior Officer group now has settings matching the Chief Engineer group, for the tabs you flagged:



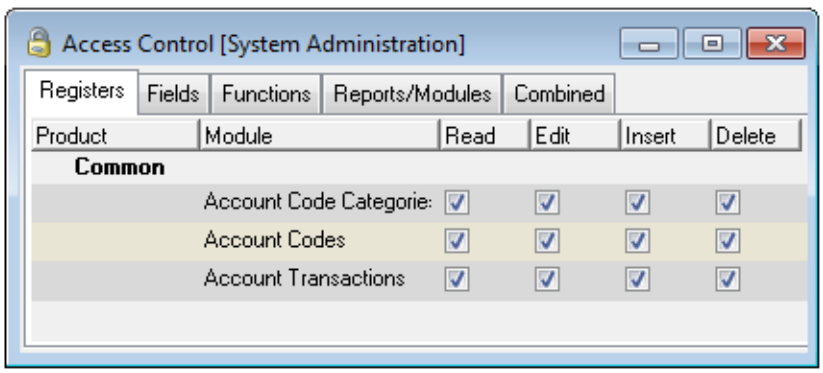
5. **Save** the window.

13.5.1 Combined Access

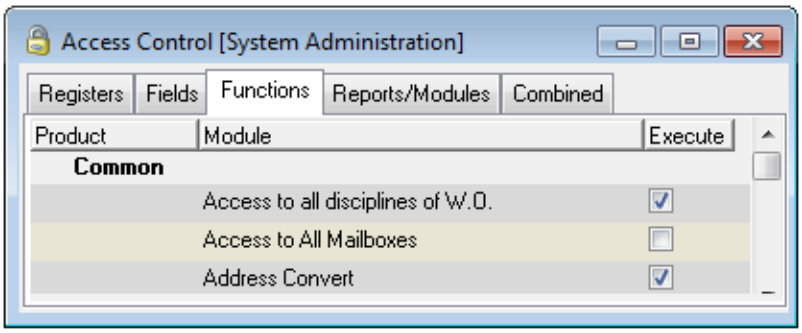
Understanding the Combined tab is key to understanding access rights in AMOS. There are two rows: **Complete System** and **General**. Each row has five columns of checkboxes: **Read**, **Edit**, **Insert**, **Delete**, **Execute**.



The Registers tab in the Access Control window also has checkboxes for Read, Edit, Insert and Delete, but no Execute checkbox:



The Fields, Functions and Reports/Modules tabs all contain Execute checkboxes, but no other columns:

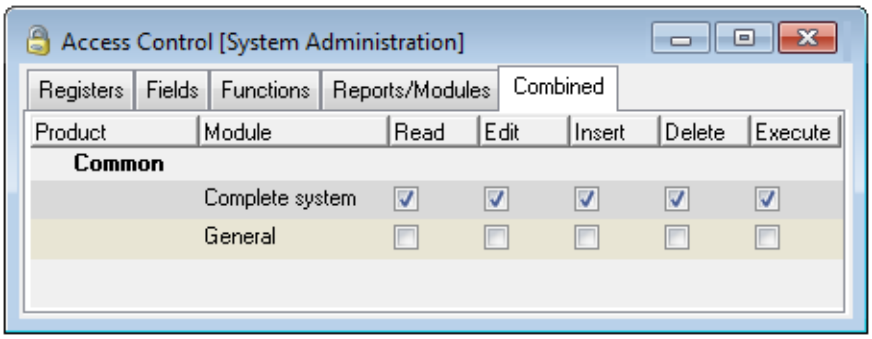


Complete System. These four other tabs correspond to the Complete System row in the Combined tab. If you give a user group Read access to the Complete System, they will have access to all the registers on the Registers tab. By default, they will have Read access on the filter for each register. If you give a group Execute access to the Complete System, they will have access to all Fields, Functions, and Reports/Modules, as well as the ability to Insert and Delete data in all registers.

General. The General row in the Combined tab corresponds to any data windows - such as filters, error messages, printer messages, DBMS, etc. - which do not have a specific access control entry in the Registers tab. All user groups need at least Read and Edit access to the General row to allow them to make changes to filters. If a particular filter - like the Address filter - was not bundled together with the Address register, searching for a delivery address in the Forms window would not work if the user did not have access to the Address register. A separate address filter would be required for each instance of its use.

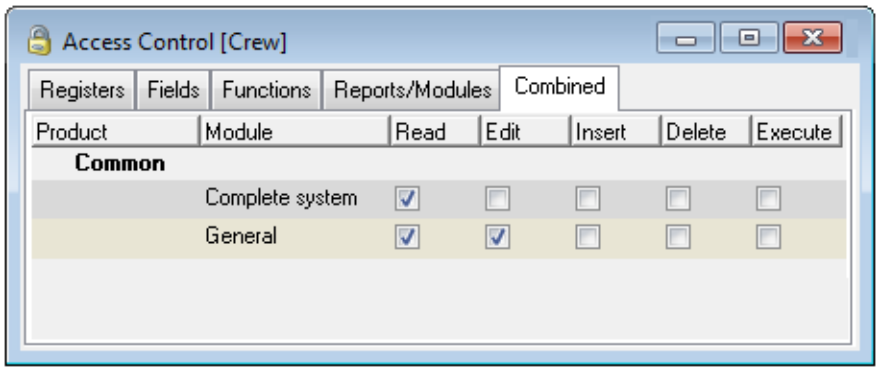
EXAMPLE

All five boxes are typically checked for the line Complete System[1] to grant the System Administration group all necessary rights:

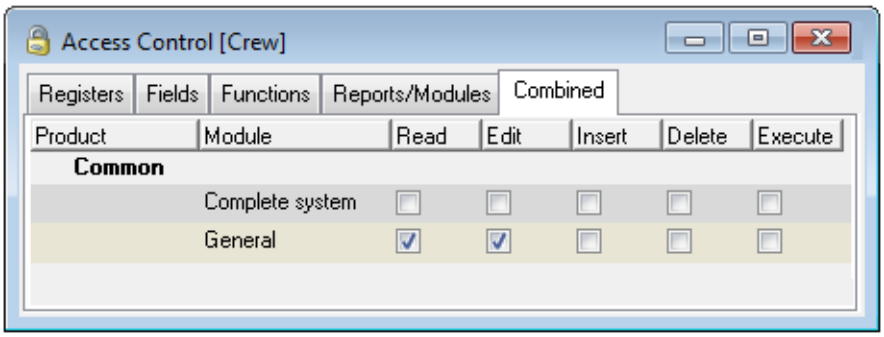


To assign Read Only access for the entire system to a user group, the minimum access rights required are Read access to the Complete System and Read and Edit access to General:

[1] 'Complete System' is generally only defined for the System Administrator group, and so bypasses all the other Access Control window tabs for that group.



To restrict this same user group from certain areas altogether, you would give Read and Edit access on General (but no access to Complete System):



Then, you would set access on the individual Registers, Fields, Functions, and Reports/Modules they can see, in each of the four tabs.

Keep in mind that *access rights are cumulative*: having either Insert or Delete access to a particular register implies that the users in that group will also have Read and Edit access to the register. However, assigning Delete access does not give Insert access by default or vice-versa.

13.6 Tab And Field-Level Access

To further restrict both the visibility and editing of fields in AMOS, define additional access rights at tab and field level:

- set certain tabs/fields to read only or editable, or
- hide certain tabs/fields altogether.

Tab and field level access settings apply to everyone, taking the logged in user's own access rights into consideration.

Access rights are always propagated in such a way as to limit access. If no access restrictions have been placed on a field, all users will have access to this field as usual according to their own access rights. If a field is set to editable but the logged in user has read-only access to that window, the field remains read-only for that user. Only the users who have been granted access to a protected field will be able to read or edit it. All other users will be unable to access such a field, even if they have access to the window it is in.

To configure field-level access:

1. Create an access grouping in the Field Access window. See section 13.6.1.
2. Add field(s)/tab(s) to the grouping. See section 13.6.2.
3. Assign collective user group access. See section 13.6.3.

To completely customise the access on a field you can define an expression to allow editing only if the condition in the expression is met.

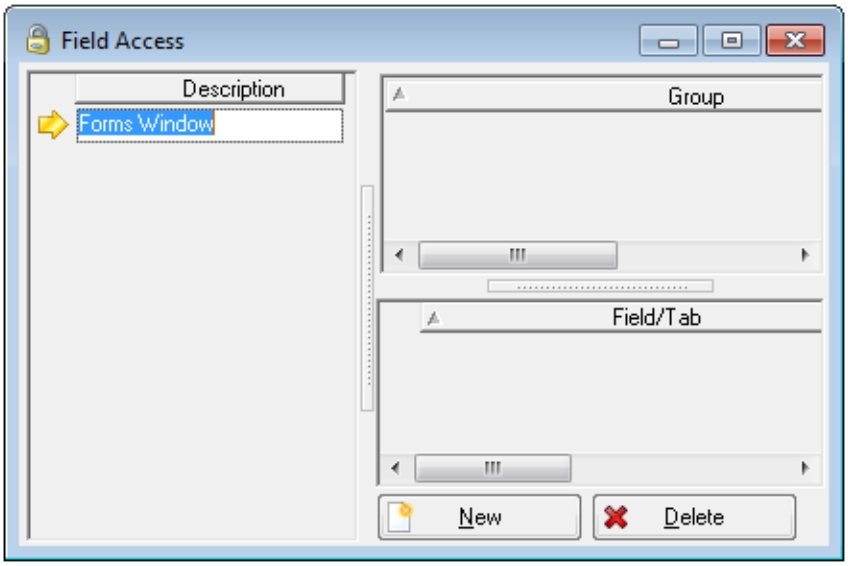
13.6.1 Creating A New Access Grouping

Create access 'groupings' to apply access collectively to all fields and tabs inside the grouping.

> **EXAMPLE**
>
> You create several access groupings by window name, like Component Window, Purchase Form Window, Work Order Window, etc. Then you add fields and/or tabs from inside of each window to the relevant grouping.

To create a new grouping:

1. Go to **Tools > Configuration > Access Control > Field Access**.
2. Click **New** on the toolbar.
3. Add a name for the grouping to the **Description** field:



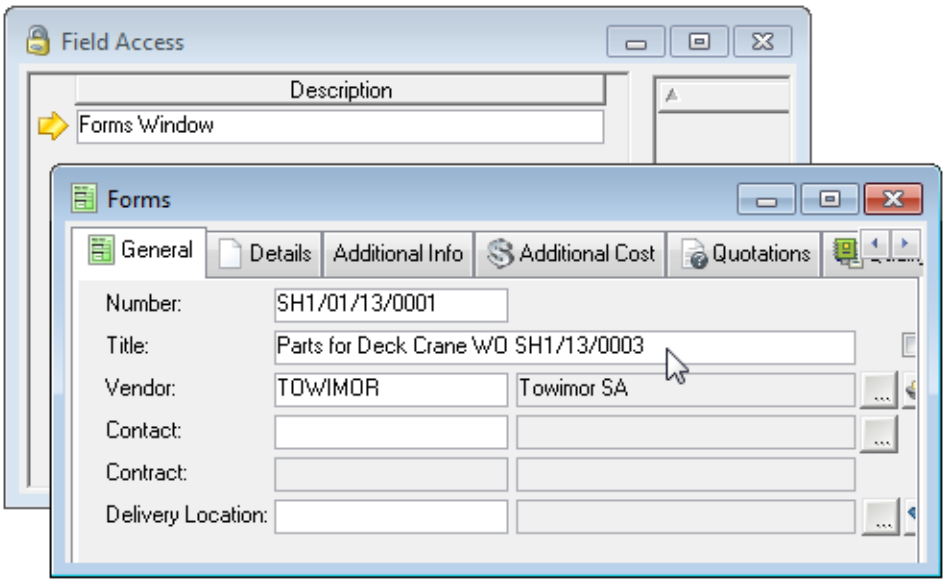
4. Click **Save**.

13.6.2 Adding Fields And Tabs To An Access Grouping

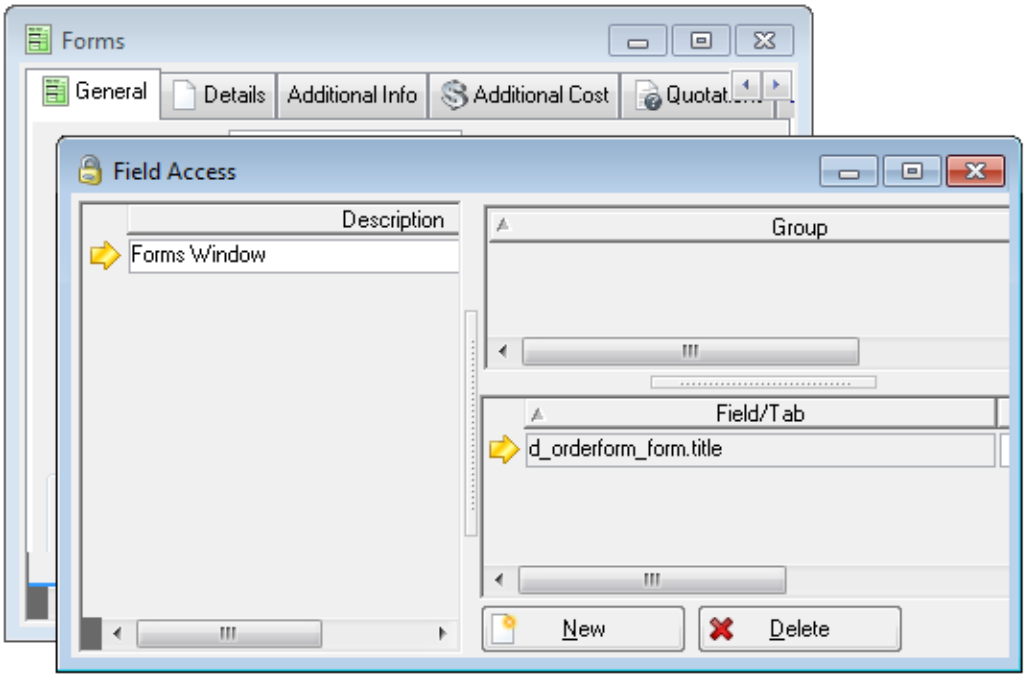
There are two ways to add a field or tab reference to an access grouping: by 'point and click' or 'drag and drop'.

Point and Click

1. Select a grouping in the Field Access window.
2. Keeping the Field Access window open, open up another window and click in any field or tab:



3. Return to the Field Access window and click the **New** button at the bottom of the right side of the window. The reference for the field/tab you just clicked will be listed:



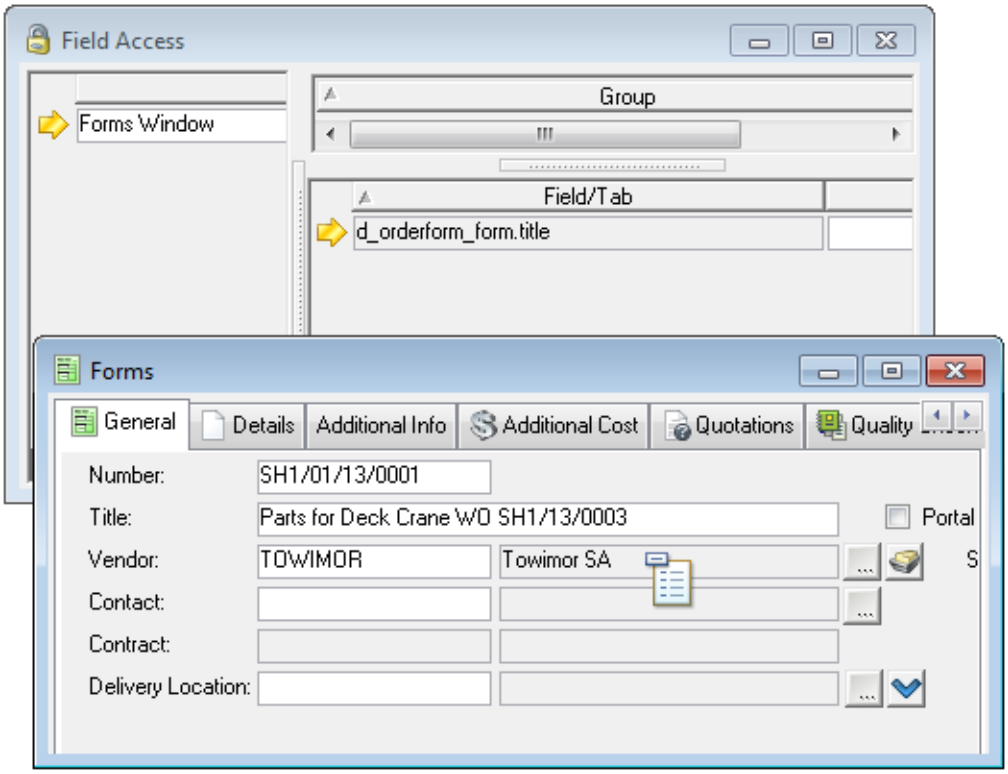
   Repeat to add as many fields as you need. Add a tab by clicking on the tab header itself and then clicking **New** in the Field Access window.

4. **Save** the Field Access window.

Remember: when you click the **New** button to automatically adds the last field/tab you clicked in outside this window.

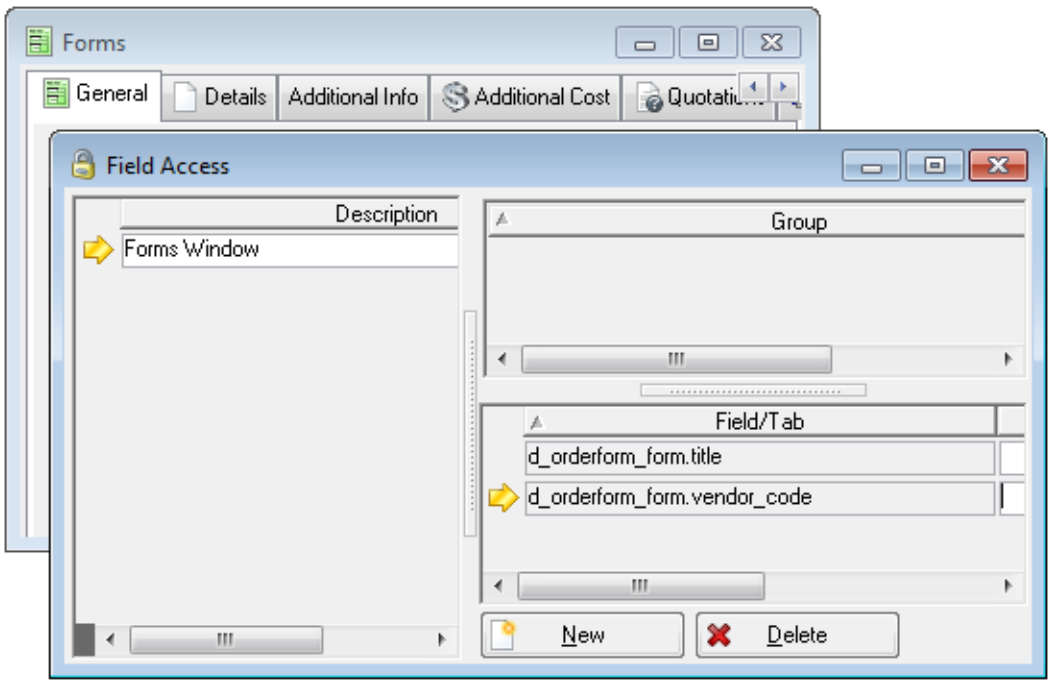
Drag and Drop

1. Select a grouping in the Field Access window.
2. Keeping the Field Access window open and visible, open up another window.
3. Click in a field and drag and drop it into the Field/Tab section on the right side of the Field Access window:



This only works for fields, not tabs.

4. The reference to the field will be listed:



5. **Save** the Field Access window.

13.6.2.1 (Optional) Defining Expressions

By defining expressions you can set conditions for allowing editing on a field or tab.

EXAMPLE

You define an expression that allows a user to modify a certain field on a purchase form only if the form is a requisition. Editing that same field will be prevented if the form is a purchase order.

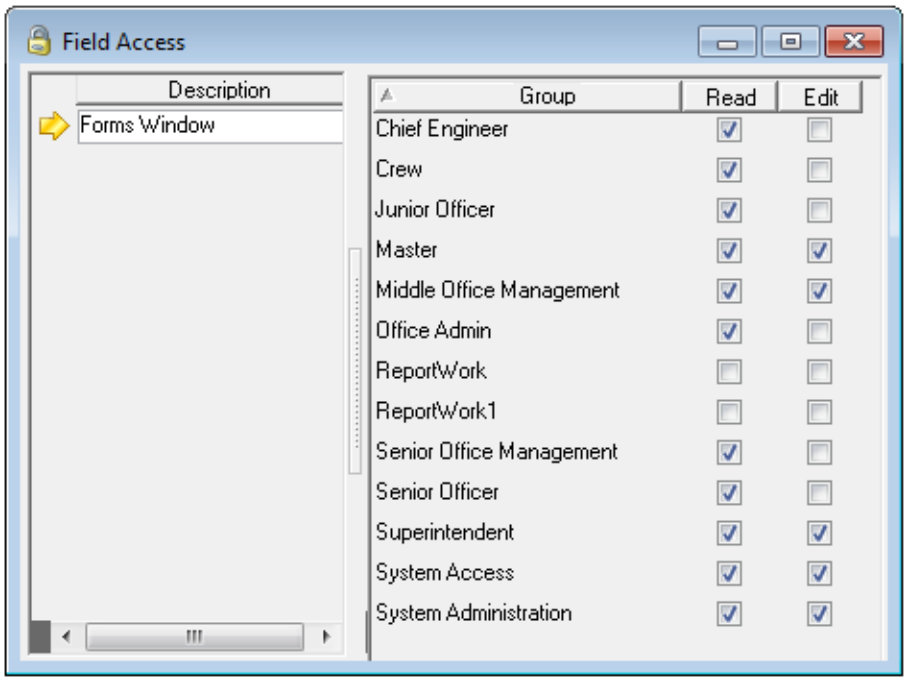
To create an expression:

1. Open the Field Access window, select an access grouping and click the **Edit if Expression is True** lookup button next to one of the listed fields or tabs.
2. Define an expression. Only columns in the same window as the selected field will be available.
3. Click the **Verify** button to test the expression to ensure it is acceptable.
4. Click **OK** to close the dialog.

NOTE: Users who already have **Execute** access assigned to their group will have edit access regardless of any expression defined on a field.

13.6.3 Granting Access To The Protected Fields

Once you add a field/tab reference to the list, it is protected and inaccessible until you grant certain user groups access to it. After saving the first field access configuration, user groups are listed on the right side of the window. Select a field access configuration and flag **Read** and/or **Edit** access by **Group**:

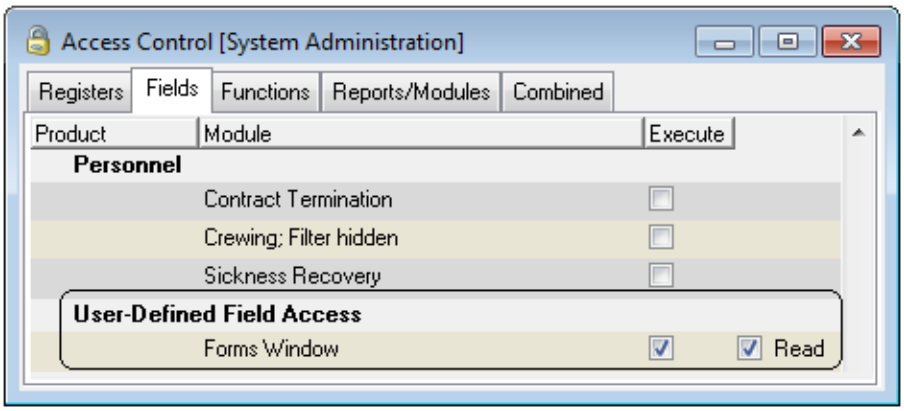


Checking **Edit** automatically grants **Read** access as well. Checking **Read** allows the user group read only access[1] to the field grouping.

The field(s)/tab(s) will be protected from everyone else automatically.

Defined access groupings are also listed in the Access Control window Fields tab (accessible from the Groups window):

[1]Read only fields will appear greyed out to the selected group.



- When **Read** and **Execute** are checked, the users in that group will be able to see and edit the relevant fields, according to their group access rights. If they do not have edit access on the window already and you grant edit access on the protected field grouping, the field(s) still remain read-only.
- When only **Read** is checked the users will be able to read but not edit the relevant fields even if they have Edit access rights in that window - unless an expression has been defined on the field allowing editing also.
- If you do not check **Read** (i.e. neither box is checked) the field will be completely hidden even if the group has Read or Edit access for the relevant window. In the case that a tab is defined as unreadable, set the parameter 'Hide Inaccessible Menu Entries' to True to hide the tab. Set it to False to render the tab visible but disabled.

CHAPTER 14 System Parameters

AMOS is a highly flexible system and can be customised in numerous ways to suit the way your company works. Setting the system parameters is one way to customise certain behaviour in the system.

AMOS is designed to handle company-wide installation and departmental separation, and caters to each groups' needs, such as special component number schemes or division of stock information.

> **EXAMPLE**
>
> It is simple to handle exceptions in the system, like a different component numbering scheme for a particular department. The system administrator simply defines the numbering scheme at the global level for the whole company, and then defines a specific one for the department in question.

To handle this division of installations and departments, the configuration parameters have a scope within which they apply. This scope can be:

- For a single department
- For all departments in a single installation
- For the entire organisation

The hierarchy provides for the inheritance of parameters: if the system does not find a particular parameter setting for the current department, it automatically looks for the installation directly over the department in the hierarchy. If no specific parameter value has been set for the installation, then the system looks for and uses the value set at the global level.

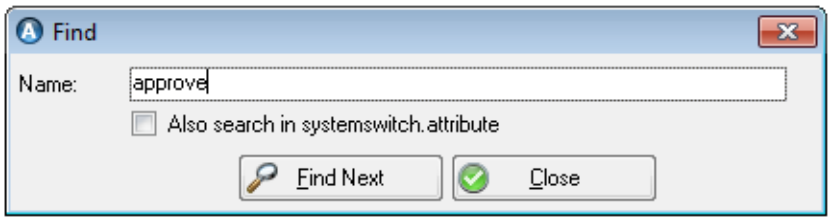
Access the Parameters window at **Tools > Configuration > Parameters**.

14.6 Searching The Parameters Window

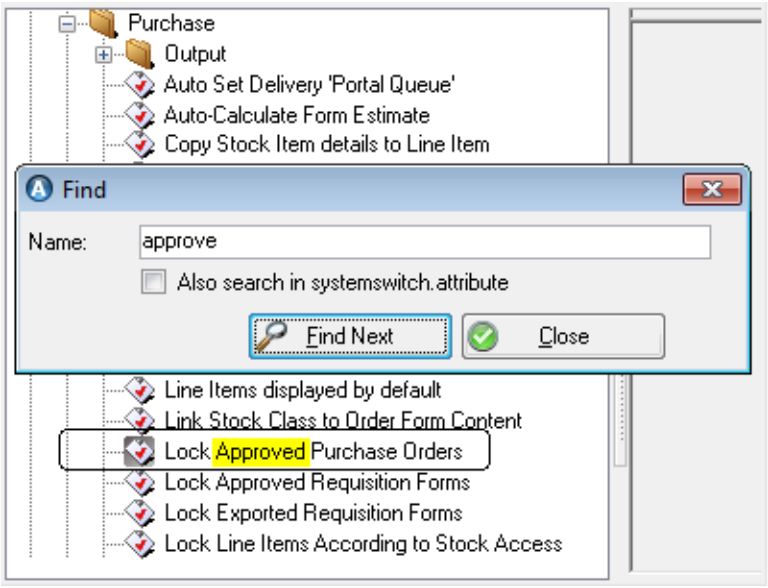
To quickly search the hierarchy and locate a parameter:

 Click the **Find** button on the toolbar.

Enter any part or all of the parameter name in the Find dialog:

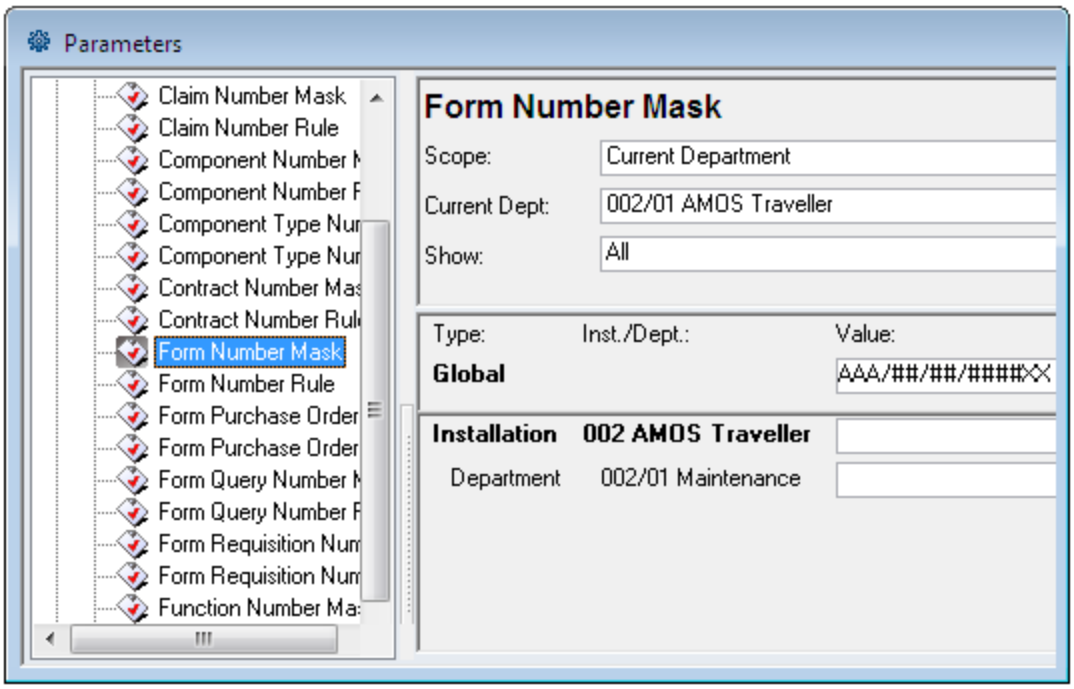


Click **Find Next**. AMOS will find the first available match and expand the hierarchy to show you:



Click **Find Next** again, to keep searching. If you don't know the name of the parameter as it appears in the hierarchy, you can flag the option to 'Also search in systemswitch.attribute'.

14.7 Auto-Numbering



This set of parameters is divided into two types: Masks and Rules. Masks control how the system displays certain fields, and which characters can be entered into these fields (e.g. input mask). Rules control the format of the system-generated numbers in 'Code' and 'Number' fields.

NOTE: SpecTec strongly recommends that wherever auto-numbering is in use, the relevant **Code** or **Number** field is edit protected. Protect such fields via the Access Control window > Fields tab, or, if the field itself is not listed there, you can configure field level access.

In the mask fields, the following characters control which characters are valid for each position in the number:

- ! - Any character - any alphabetic characters are automatically uppercased by the system.
- ^ - Any character - any alphabetic characters are automatically lowercased by the system.
- A - Any alphanumeric character.
- X - Any character.
- # - Any numeric character.

Any other character appearing in the mask is displayed in the input field as un-modifiable positions. These separate sections of the number: for example, a typical component mask would be ###.##.##. This would give potential component numbers of 601.00.00, 712.47.01, etc. A typical address mask would be !!!###. This would give potential address codes of ALF001, SUL002, etc.

The work order, purchase form and transport document numbers have both a mask and rule as they are system generated numbers whose appearance can be controlled.

In the example above, the field Form Number mask ends with two X-es to facilitate the entry of form numbers that AMOS has split. For example, a purchase order may be split into two or more sub-forms, and in that case, AMOS adds the character A to the form number. The two X-es in the form number mask allow the user to enter this modified number.

14.8.1 Creating New Rules

Rules determine the data that is displayed.

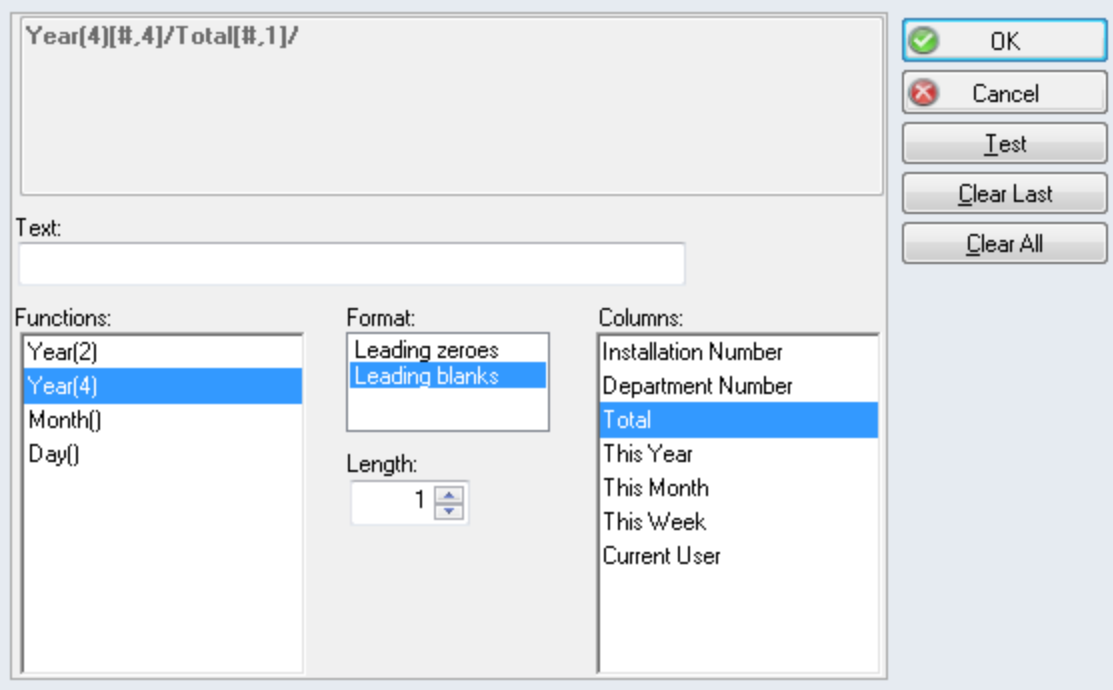


Figure 74 The Build Form Number Rule Window

To start building a rule, click one of the **Functions** on the left. The lengths of the functions are pre-defined, and cannot be changed: Year(2) is the two digit current year; Year(4) is the four digit current year; Month() is the two digit current month; and Day() is the two digit current day. Several functions may be used in the same rule. Once you have selected a function, it is displayed in the grey field in the upper part of the window.

The **Format** field is for specifying whether the numbers should be preceded by zeros or not. The Month() and Day() can have leading blanks, but leading zeroes is the preferred setting. The expression at the top of the window shows 0 if Leading zeros is selected, and # if Leading blanks is used. If the wrong format is shown for a function, click the function again to remove it from the expression, select the desired format, and click the function once more to re-insert it in the expression.

The second half of the expression consists of values from the listed **Columns**. Columns get their values from the current Installation, Department, and User, along with the values in the Number Series table. The Length is the number of characters a column occupies. Specify a Length first and then click the Column name. For example, Total[0,5] represents the Total column with a Length of 5 padded with leading zeros, 00001, 00002, etc.

The Component Type Number and Component Number Rules each have two additional Columns: Component Class Code and Component Class Total. These allow you to specify numbering rules based on the Component Class assigned to the data. The Stock Type/Item Number Rule has two additional Columns also: Stock Class Code and Stock Class Total. This allows you to specify numbering rules based on the Stock Class assigned to the data.

Once the rule is entered, click the **Test** button to see how the rule works.

The defined Rule is displayed according to the Mask defined for the field for which the Rule is being created.

If the Rule does not produce the intended result, click the **Clear Last** button to remove the last part of the expression under construction, or click the **Clear All** button to start fresh to rebuild it.

14.9 Default Templates

A number of tables in the system contain a Details tab or a Full Description window. These tabs/windows are present in the component stock item, address, job description and order form tables among others.

AMOS provides a feature called Templates (also called Layouts), which makes it possible to define how the Details tab is presented on screen. Using templates, the Details tab can be given the appearance of a specialised input form. Templates are usually attached by selecting **Edit > Change Template**. However, these parameters make it possible to attach a template automatically on creation of a new table entry.

The Parameters window contains an entry for each table containing a Details tab/Full Description window, and allows you to select from the already defined template list which template to attach for each register.

Chapter 27 describes the Templates register where templates are stored, and how to create new templates in the Form Designer and import these form definitions to the Templates register.

The default setting for the fields in the Default Templates parameter folder is Empty. To define a default for a table, select the table in the list and then click the lookup button (Global/Installation/Department) to open the list of available templates and select one.

Some tables in the Default Templates parameter folder will support selection of both basic and enhanced templates as default:

- Budget Codes
- Functions
- History
- Line Items
- Noon Reports
- Order Forms
- Voyages
- Work Orders
- The rest accept basic templates only.

14.10 Directories

Several important system directories are outlined here. The Installation Directory is the folder where the amosw.exe program is located. The other directories are sub-folders of this one.

Enter the path to each of the following folders.

CBM Directory

This directory defines the location where the system can find CBM day files.

See Chapter 24 for the use of Condition Based Maintenance.

Default setting: the CBM sub-folder of the AMOS Business Suite Installation.

Crew Member Document Directory

This directory defines where to store attachment files for connecting to employee records, if not in database. If the 'Store Documents in Database' parameter is set to TRUE, then do not set any value here.

Graphics Directory

This directory defines where graphic files are located. If set incorrectly, you may have trouble displaying graphic files.

Default setting: the Graphics sub-folder of the AMOS Business Suite Installation.

Hand Terminal Directory

This directory defines where files generated by hand terminals are stored.

This function is described in Chapter 8.

Default setting: empty.

Installation Directory

This directory defines where the system itself is installed. If this parameter is not set correctly, it can cause problems with the Import/Export module.

Default setting: the root folder of the AMOS Business Suite Installation.

Personnel Report Directory

This directory defines the directory where the standard Personnel reports are located.

Remote Workflow Directory

This directory defines the directory where HTML files queued for export, are stored temporarily before they are sent to a remote user.

Report Directory

You can tailor the appearance of a standard work order, planned maintenance work order, purchase order, requisition form, query and transport document printouts. This parameter defines the directory where these tailored reports are located.

Default setting: the Reports sub-folder of the AMOS Business Suite Installation.

Transfer Directory

This directory defines the location where selection files and import files are found, and where generated export files are placed.

Default setting: the Transfer sub-folder of the AMOS Business Suite Installation.

14.11 Options

This is the most general category of parameters, and contains a variety of switches and values varying from file extensions for the Import/Export module to whether maintenance is to reported back at the employee level or at the group (or discipline) level.

14.11.1 Accounting

Account Code Type for Maintenance

This parameter defines the type of Account Codes available for the Maintenance module lockup lists and entry fields. If the parameter specifies only account code type Class of Cost, these will be the only type of account codes available. For backward compatibility (new installation and upgrade), only the Class of Cost option should be selected, and the Track Maintenance Transactions must be set to TRUE.

Your license must include the accounting module of the AMOS Business Suite.

Default setting: 3 (Class of Cost)

Track Maintenance Transactions

Set to TRUE to capture expenses for Resources Used and Miscellaneous Expenses to an Account Code.

Your license must include the accounting module of the AMOS Business Suite.

Default setting: TRUE

Track Purchase Transactions

Set to TRUE to capture Order Form expenses to an Account Code.

The current license must include the accounting module of the AMOS Business Suite.

Default setting: TRUE

Track Stock Transactions

Set to TRUE to capture expenses for Stock Transactions other than Purchases to an Account Code.

The current license must include the accounting module of the AMOS Business Suite.

Default setting: TRUE

14.11.2 Financial

Allow User-Defined Impact on Purchase Budget

Setting this to TRUE causes the Forecast column to appear on the Budget Overview screen and allows users to define statuses to appear in the Forecast and Committed columns. The Forecast column will appear for Stock and Maintenance class Budget Codes, but have no meaning.

Default Setting: FALSE

Budget at Line Item Level

AMOS provides the ability to budget at the Order Form header level or at the individual Line Item level. This parameter has four possible values:

- Never - the Budget Code will always be specified at the header, that is, on the Order Form itself, and apply to the whole order.
- Always - a Budget Code must be applied to each Line Item.
- Seldom - a checkbox will appear on the Order Form: Budget at Line Item Level. If The checkbox is unmarked by default.
- Often - a checkbox will appear on the Order Form: Budget at Line Item Level.The checkbox is marked by default.

Default setting: NEVER

Enforce Budget Approval

If this parameter is set to TRUE, in all lookup fields (excluding those in filters) where users can choose a budget code, the list will contain only budget codes with status 'Approved'.

Default setting: FALSE

Financial Year Early Start

Set this parameter to TRUE to allow for the early start of the financial year. Many US companies start their financial year in October.

Default setting: FALSE

Interrupt Approval Warning Limit Adjustment, When Sub-Group Exists

The Budget Hierarchy allows you to enter an Approval Warning (%) and an Approval Limit (%) for each Budget Group. If there are subgroups with their own values attached and you edit the parent Group, you have three options for what to do with these values: override (SUPPRESS WITH YES), leave alone (SUPPRESS WITH NO), or allow the user to decide (INTERRUPT).

Default Setting: INTERRUPT

Month-End Close Period (Days)

Use this parameter to specify when monthly accounts are closed. For example, a value of 5 means that the accounts are closed 5 days before the end of the month.

Default setting: 0

Start Date For Financial Year

Use this parameter to set the start of the financial year according to varying world-wide practices: e.g., the UK starts its financial year on April 6th and France on January 1st. Once this date is set, it can be very complicated to change.

Default Setting: 1998-01-01

Track Custom Clearance Expenses

Set this to TRUE to capture Custom Clearance Form expenses to a Budget Code. The Budget Code will be a Purchase Class Budget Code. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Track Maintenance Expenses

Set this to TRUE to capture expenses for Resources Used and Miscellaneous Expenses to a Budget Code. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Track Purchase Expenses

Set this to TRUE to capture Order Form expenses to a Budget Code. If tracking is turned on, the system checks that budget codes entered are valid. It automatically registers financial transactions against the specified budget and signals the user if a budget is exceeded by a pre-determined warning value. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Track Stock Expenses

Set this to TRUE to capture expenses for Stock Transactions other than Purchases to a Budget

Code. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Use Budget Control When Approving Forms

Budget Control activates the Approval Warning (%) and Approval Limit (%) that you specify in the Budget Hierarchy. Setting this to TRUE provides a warning message if the Order Form's Estimate is over the warning percentage for the Budget Group, but still allows approval; it will prevent approval if the Order Form's Estimate is over the Budget Group's limit percentage.

In order for this to work, the parameter 'Allow User-Defined Impact on Purchase Budget' must also be set to TRUE. Every Order Form in either a Forecast or Commmitted status will apply to the total at the time of approval.

Default Setting: FALSE

Use External Budget Figures for Budget Approval Warning Levels

Four columns exist in the BudgetGroupAccumulated table:

BudgetExternal, ExpenditureExternal, BudgetInternal, and ExpenditureInternal.

The value in the BudgetInternal column comes from the accumulated budget for all Budget Codes in the Budget Group. The value in the ExpenditureInternal column accrues as Order Forms are approved.

The BudgetExternal and ExpenditureExternal columns must be populated via an interface or via the amosapi through an external application. Setting this parameter to TRUE causes AMOS to look at the two external columns for the approval warning and limit percentages.

Default Setting: FALSE

Use Specification for Purchase Budget

Set to TRUE to use specifications to update figures for the Purchase budget class.

Specifications are a way to build up a Purchase Budget estimate by adding items, their estimated costs, and the period (month) in which they apply. If you use Specifications, then the Model for the Budget Code must be set to Manually Allocated Budget.

Default setting: FALSE

Use Specification for Stock Budget

Set to TRUE to use specifications to update figures for the Stock budget class.

Default setting: FALSE

Use Specifications for Maintenance Budget

Set to TRUE to use specifications to update figures for the Maintenance budget class.

Default setting: FALSE

Use Voucher to Update Forms Details

There are two ways to update the Purchase Budgets. If this parameter is set to FALSE, the Budget is updated from the Part Paid and Final Total fields on the Purchase Order. These values must be entered manually by users. If this parameter is set to TRUE, then it will be necessary to enter a Voucher to update the Budget.

It is very important to realize that when you Budget at the Line Item level, you must enter Vouchers; otherwise, AMOS would have no way of knowing how to separate the amounts you enter in the Part Paid and Final Total fields among the various Line Item Budget Codes.

Default setting: FALSE

Voucher; Use Work Flow

Set to TRUE to use your customised Work Flow to track the progress of each voucher from (for example) creation to approval to payment issued or received. This requires that a Work Flow configuration be in place.

Default setting: FALSE

14.11.3 Options - General

14.11.3.1 Attachments

Attachment File Stamp

When a file is attached to a record in AMOS, its date may require resetting. This parameter controls if the date on attachments should be updated or not.

When an attachment which is not stored in the database is added either by drag and drop onto an Attachments tab or by insertion in the Attachment References window, AMOS will refer to the setting of this parameter to determine if the date and time on the file should be left as is, or updated to match the date and time found on the database server.

Default setting: LEAVE AS IS

Attachments - Attachments File Operation

Set this parameter to determine the system's action when a user tries to add an attachment which is not already stored in the Graphics folder for that installation:

Set to WARN the user will be simply be warned that the attachment is not yet in the installation's Graphics folder. Set to COPY, the attachment file will be copied automatically to the Graphics folder without a user message. Set to MOVE, the file will be moved to the Graphics folder without a message to the user. Set to ASK, a dialog appears and the user can decide whether to Leave the file where it is, Copy it to the Graphics folder, or Move it there.

Default setting: ASK

Attachments - Attachments Maximum Size

Use this parameter to set the maximum size (kb) for any attachment used within the system. No value means no restrictions apply.

Default setting: None

Attachments - Attachments Oversize Action

When set to WARN, if a user tries to add an attachment which exceeds the size allowed by the parameter 'Attachments Maximum Size', the user will receive a warning message indicating that the attachment exceeds the maximum and allowing them to choose to proceed, or not. If this parameter is set to PREVENT, and the user tries to add an oversize attachment, they will be stopped from adding the attachment.

Default setting: PREVENT

Attachments - Attachments Store in Database

This parameter gives the user the option of storing a dragged and dropped Attachment in the database upon insertion. For files stored in the database, the associated Attachment Reference will have the checkbox Store in DB marked automatically and the file stored in the ImageFile table.

When set to Always or Never, the file is always or never stored in the database. When set to Ask and a user attempts to drag and drop an Attachment, a dialog appears asking if the file should be stored in the database or left at its current location.

Default setting: NEVER

14.11.3.2 Dashboard

Dashboard - Alerts Maximum Size

Setting this parameter determines the length of the longest bar(s) in the dashboard Alerts Overview. When you select AMONG ALL ALERTS, the system takes the maximum value of the greatest alert and scales all of the other alerts down accordingly. When you select PER GROUP, the system takes the maximum value of all the alerts in each group, makes the length of each bar the same, and scales all of the other alerts within the group down accordingly.

Default setting: AMONG ALL ALERTS

Dashboard - Manual Refresh Only

AMOS automatically refreshed dashboard alerts at login and upon switching departments even if the check interval is set to 0 (off). Setting this parameter to TRUE will prevent all automatic refreshing of dashboard alerts at startup, department switch and the timed refresh interval set on the User Option 'Mailbox/Dashboard Check Interval'.

Default setting: FALSE

Dashboard - Use Separate Retrieval Thread

If set to TRUE, this parameter allows the system to perform the dashboard alerts calculation and data retrieval in a separate thread. This enables the user to continue to work without being interrupted by dashboard operations. The green arrow indicator will shift from Alert to Alert when you refresh the screen, to indicate which alert is being processed. The user is free to work in other parts of AMOS.

Set to FALSE, the same work thread within the application is used for these dashboard operations.

Default setting: FALSE

14.11.3.3 Database

Database - Compatible To Version

Since different versions of AMOS may have different field lengths on certain fields, this setting allows you to maintain compatibility between different versions of AMOS that may be installed throughout your company. The standard setting for this is CURRENT, that is, the current version of the system. However, if you have one site that has not been upgraded to the current version, you will need to set this parameter to whatever version is in use at that site.

NOTE: It is important that all your installations of AMOS are of a compatible version to ensure that there are no replication errors due to different column widths.

Database - DB Error Text Marker

This parameter will allow you to specify custom error messages that will appear when you add triggers to the database. The character(s) you enter here will indicate the beginning and end of the error messages you want to appear.

14.11.3.4 Default Settings

These parameters specify the default values for data created within the system.

Default Settings - Budget Code Status

When you create new Budget Codes or generate new ones on a yearly basis, each budget code will start with a default status. This setting specifies that status.

1 Parked

2 Preliminary

3 Approved

Default Settings - Budget for Component Job

This parameter determines the search order when checking for a component job's default budget code. The default setting is Maintenance Type, Component which means that the default budget code is taken from the maintenance type if one exists. Otherwise the budget code for the component is used. This parameter has two states, the one described above and the reverse search order of Component, Maintenance Type. This only applies if the Accounting module is not being used.

Default Settings - Default Status On Component Transfer

In a centralised database it is possible to transfer Components from one site to another. This parameter controls the default value for components when transferred from one department to another department. The status is applied at the time of transfer and is visible as the component status in the receiving department.

In other words, as long as a component is not In Use you can change its status to Transferred, and then transfer it to the awaiting site where it will receive the status set here.

Default setting: Available

Default Settings - Default Value Mark Work as Completed

This setting determines whether or not the Mark Work Order as Completed checkbox is checked by default when a User chooses to report work.

Default setting: TRUE

Default Settings - Default value Quotation Update Stock Item Field

This setting determines whether or not the Update Stock Items checkbox is checked by default when a user enters a new Quotation for an Order Form.

Default setting: False

Default Settings - Depreciation Level

Any Stock Transaction besides purchases can receive one of five Depreciation Levels. When the Depreciation feature is activated, this setting controls the initial status of Stock Items. The default setting is 1, which corresponds to level 1, which is normally 'new,' or 0% depreciation. Up to 5 levels of depreciation can be set.

Default Settings - Form Type

A Purchasing module parameter, this value controls which type of form to create (i.e. requisition form, query or purchase order) during automatic form creation. In a shipping scenario, it is normally the case that vessels create requisition forms while shore side offices create purchase orders.

This value is usually set in conjunction with access rights on the Order Form tables to grant or limit access to create certain types of Order Forms. A user with the correct permissions would be able to create the other types of Order Forms.

Default setting: PURCHASE ORDER

Default Settings - Initial CBM Work Order Status

Condition-Based Maintenance Work Orders are initiated by day files that reside in the CBM subfolder under the AMOS Installation folder.

When the CBM (Condition Based Maintenance) module is active, this setting controls the Initial Status of Work Orders. The available options are Requested, Planned and Issued.

Default setting: ISSUED

Default Settings - Initial Corrective Action Work Order Status

Corrective Work Orders reside in the Quality and Safety system and are a means to track the work involved in keeping the vessel in compliance with international safety regulations.

This setting controls the Initial Status of Corrective Action Work Orders. The available options are Requested, Planned and Issued.

Default setting: ISSUED

Default Settings - Initial Form Delivery Option

There are four options for specifying delivery destinations on forms/quotations: Address, Location, Port and Port Call. Although values can be entered for all four on a form, the field which appears by default on new forms (and is used on the eventual order) can be selected here. Users can change this default manually in the Forms and Quotations windows. There is an exception: the default delivery destination on forms which belong to purchase contracts is always Location.

Default setting: LOCATION

Default Settings - Initial Periodic Work Order Status

Periodic Work Orders are standard preventive maintenance Work Orders based on either frequencies or counters.

This is for setting the initial status of automatically created periodic work orders.

Default setting: ISSUED

Default Settings - Initial Project Work Order Status

Project Work Orders are Work Orders created from within a Project. This resolves potential conflicts of attaching Work Orders to a Project whose statuses are different from Work Orders created within the Project.

This is for setting the initial status of Project work orders.

Default setting: ISSUED

Default Settings - Initial Requisition Work Order Status

Requisition Work Orders are work requests, that is, ad hoc work done either on a one-time basis such as an installation, or breakdown maintenance.

This is for setting the initial status of manually created work orders.

Default setting: ISSUED

Default Settings - Initial Round Work Order Status

Round Work Orders are groups of similar jobs that will appear on the same Work Order.

This is for setting the initial status of automatically generated round work orders.

Default setting: ISSUED

Default Settings - Location for Stock Items

This is for defining and using multiple stock item locations. If several locations are defined in the Locations hierarchy, one can be defined as the default location, automatically attached to each newly created stock item.

Default setting: Empty

Default Settings - Maintenance Cost Account Category

This parameter helps to define the default Account Code for new Component Jobs. After the User attaches a Cost Centre to the Component and selects to add a new Component Job, AMOS will select the appropriate Account Code based on whether one from this default Category is included in the Component's Cost Centre.

Default setting: Empty

Default Settings - Output Format for new Job Related to Components

Work Orders have three print formats: List, Compact List and Detailed. List gives only one line per selected job. Compact list gives a few lines containing the most important information. Detailed contains the full job description.

Default setting: COMPACT

Default Settings - Output Format for new Rounds

Work Orders have three print formats: List, Compact List and Detailed. List gives only one line per selected job. Compact list gives a few lines containing the most important information. Detailed contains the full job description.

Together with the Output Format for Rounds is the Reporting Method. It is important to understand the impact of the Reporting Method because this determines the types of Maintenance Logs and Histories recorded.

- **Simple**: reporting via the Simple method will create one Maintenance Log as a repository for the History, Stock Used, Resources Used, and Counter Readings for all Components on the Round. This Maintenance Log will not have a Component number or Job Code attached to it, only the Round and Work Order numbers. The History and Stock Transactions will also not have Component numbers or Job Codes attached, therefore you will need the Work Order number to track these down.

  All Components belonging to the Round will have Maintenance Logs, but these Maintenance Logs will not track individual Histories, Stock Used, Resources Used, or Counter Readings.

- **Full** : reporting via the Full method will create individual Maintenance Logs, Stock Transactions, Histories, and Counter Readings for each Component on the Round. This is a more complete method, but can require more data entry.

Default setting: COMPACT

Default Settings - Output Format for Work Requisitions

Work Orders have three print formats: List, Compact List and Detailed. List gives only one line per selected job. Compact list gives a few lines containing the most important information. Detailed contains the full job description.

Default setting: DETAIL

Default Settings - Priority for new Job Related to Components

A job can be given a numerical priority of up to three digits; 1 being the highest priority and 999 being the lowest. Your organisation decides which priorities to assign.

Default setting: 5

Default Settings - Priority for new Rounds

A round can be given a priority of up to three digits; 1 being the highest priority and 999 being the lowest. Your organisation decides which priorities to assign.

Default setting: 5

Default Settings - Priority for Work Requisitions

A round can be given a priority of up to three digits; 1 being the highest priority and 999 being the lowest. Your organisation decides which priorities to assign.

Default setting: 4

Default Settings - Status for New Components

This field is used to set the status of new components introduced in the system. The possible options are: (None), In Use, Available, Repair, Scrapped and Transferred.

Default setting: 3 (Available)

14.11.3.5 Editor

The following parameters concern the text editors used in AMOS.

Editor - Additional Detail Data on Unit Level

This parameter works in conjunction with the parameter Editor - Use Additional Note Field. They determine the presence or absence of additional Details tabs in the Stock Type/Stock Item/Component Type/Component windows, when any of those windows has an enhanced template in use:

- If both parameters are set to FALSE, only one Details tab will appear in the Component Types/Components/Stock Types/Stock Item windows.
- When this parameter is set FALSE but the second is set to TRUE, two Details tabs will appear in any of these windows which contains an enhanced template.
- When this parameter is set TRUE but the second is set to FALSE, only one Details tab will appear in the Component Type/Stock Type windows, and two Details tabs (one linked to Type and one to Item) will appear in the Components/Stock Item windows.
- If both parameters are set to TRUE, two Details tabs will appear in the Stock Types/Component Types windows when an enhanced template is present. Four Details tabs (two linked to Type and two linked to Item) will appear in the Components/Stock Items windows when an enhanced template is present.

Default setting for both: FALSE

Editor - Classic Editor Font

This parameter controls the display font for all the details forms created using the Classic Editor. It is also reflected in printouts of these screens. Click the lookup button to access the font selection window. Choose the type, style and size of the font you require and click OK to select.

Fonts can be implemented at a Global, Installation or Departmental level.

Default setting: Empty (system displays Arial)

Editor - Converted Enhanced Text Type

The table ConvertedEnhancedText by default stores converted RTF data in BMP image files, and is updated whenever users change or print RTF data. To prevent the database from growing unnecessarily large, use this parameter to switch the cache mechanism off, or to select to store the RTF data images in the JPEG format which requires less space.

- If set to NONE, the cache will not be used; no data will be stored in the ConvertedEnhancedText table.
- If set to BMP, AMOS will store the RTF data images in the ConvertedEnhancedText table in BMP format.

- If set to JPEG, AMOS will store the RTF data images in the ConvertedEnhancedText table in JPEG format using compression quality 90.

Note that the ConvertedEnhancedText table is not replicated between AMOS installations. AMOS creates the data automatically as needed. To save space and remove old data from the cache it is safe to schedule a deletion of records for this table, and AMOS will again create records automatically as needed.

If you change the parameter setting from BMP to JPEG and vice versa, AMOS will change existing cache data the next time a user changes or prints RTF data.

Default setting: BMP

Editor - Max Size (kB)

This parameter is for controlling the maximum file size of details forms to avoid excessive data retrieval/replication times.

The size can be any amount between 0 and 1000, where the number equals the maximum file size in kilobytes for each details form in the system. If 0 is selected there is no limit on the file size.

Use care when applying this limit because it will be applied to each detail form instance. This means that if you set the limit to 1,000 kilobytes (1 megabyte) and the limit is almost reached on 1000 detail forms, the amount of data to be replicated will be 1,000,000 kilobytes (1 gigabyte).

NOTE: Due to file conversion limitations, the maximum bitmap image file size is slightly less than half of the designated amount in this parameter. If the parameter is set to 1000, the maximum bitmap size is 499 kilobytes. Other image formats may be inserted, but any image compression will be removed upon insertion and that the maximum size may be reached unexpectedly.

Default setting: 0 (unlimited)

NOTE: Due to a feature in the Enhanced Editor functionality, if an image is to be added to the page the user MUST also include a minimum of one text character or space. If an image is added to an otherwise empty editor page, it will disappear when an attempt is made to save the change.

Editor - Enhanced Editor Defaults

This parameter allows you to define default values for the font and page size applied wherever the enhanced editor is in use.

Page

Click the **Page Setup**button to define the margins and page size.

Font Size and Style

Click the **Font Setup** button to define the font size, style and colour applied wherever the enhanced editor is in use.

Existing text will not be affected by any changes to this parameter; only new and empty enhanced text will follow any updated settings.

Editor - Type Common

This parameter determines the type of text editor used in Details windows within the common functionality areas of AMOS, for example the Registers. See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type Custom Clearance

This parameter determines the type of text editor used in Details windows within the Custom Clearance areas of AMOS. See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type Maintenance

This parameter determines the type of text editor used in Details windows within the Maintenance and Stock related areas of AMOS. When set to ENHANCED, the option to print enhanced text content on separate pages following the rest of the printed content is added to the Print dialog in the Maintenance Work Orders window.

See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type Personnel

This parameter determines the type of text editor used in Details windows within the Personnel areas of AMOS. This setting conflicts with the Maintenance setting for the Employee register above. If you are not using AMOS Personnel, then the previous setting is adequate. If you intend to use AMOS Personnel, then set this as desired and do not give access to the simple Employee list.

See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type Purchase

This parameter determines the type of text editor used in Details windows within the Purchase and Budget areas of AMOS. When set to ENHANCED, the option to print enhanced text content on separate pages following the rest of the printed content is added to the Print dialog in the Purchase Forms window.

See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type Quality

This parameter determines the type of text editor used in Details windows within the Quality & Safety areas of AMOS. See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type TMSA

This parameter determines the type of text editor used in Details windows within the Self Assessment areas of AMOS. See section 2.4.11 for further information on the Details forms.

Default setting: CLASSIC

Editor - Type Voyage

This parameter determines the type of text editor used in Details windows within the Voyage Management areas of AMOS. See section 2.4.11 for further information on the Details forms.

Editor - Use Additional Note Field

See 'Editor - Additional Detail Data on Unit Level', above.

14.11.3.6 File Extensions

NOTE: AMOS's native import/export uses the settings in this section. Import/export carried out using AMOS Replication uses completely different settings.

These parameters allow you to set the file extensions used in AMOS.

The default settings are as follows:

EXP - Export Files, Import Files

HTD - Hand Terminal Files

OK - Successfully Imported Files

File Extensions - Export Import Temp Character

This sets the character used for creating the file extensions on import. The import files are split into <file name>.<Temp Char><Export File Prefix>. For example, if file 00000001.EXP contained Addresses and Component Types, the files first created would be 00000001.TXT, which would hold the information being imported, in this example Addresses, and 00000001.¤CM, which would hold the Component Types.

File Extensions - File Extension for Export Files

The system maintains a sequence number for both import and export operations. Since these sequence numbers are used to name the files created by these operations, it is important to be able to differentiate between files created by export and ready for transfer to another site and those received which are ready to be imported. This is done by defining different file extensions for the various files handled by the Import/Export module.

This parameter defines the extension for export files generated by the system.

Default setting: EXP

File Extensions - File Extension for Hand Terminal Files

A hand terminal may be used to record stock transactions. The data from the hand terminal may be exported in the form of a file, which may then be imported into AMOS stock levels. This parameter specifies the file extension for such hand terminal files.

Default setting: HTD

File Extensions - File Extension for Import Files

As a complementary parameter to the parameter File Extension for Export Files, this value defines which extension identifies files ready to be imported by the system.

Default setting: EXP

File Extensions - File Extension for Successfully Imported Files

As a complementary parameter to the previous one, this value defines which extension is to be given to import files that have been successfully imported by the system.

Default setting: OK

14.11.3.7 Portal

The following set of parameters controls the behaviour of AMOS e-Business Direct functionality.

Portal - Billing Address

The Billing Address parameter is where the code for the address where purchase invoices

should be sent is maintained. When you enter the Billing Address filter you will be presented with the Addresses window from which you can chose the correct address. The chosen address will be shown as an eight digit code.

Default value: Empty

Portal - Log Successful Portal Operations

Set to TRUE, the system will store not only errors but also successful portal operations in the Portal Log.

Default Setting: FALSE

Portal - Portal Line Item Reference Priority

If the value for this parameter is set to VendorRef, MakersRef the system writes the Vendor Reference value into the XML file if both values are available. If only one of the two is available, that value is written into the XML file.

If this parameter is set to MakersRef, VendorRef the Makers Reference is written to the XML file as the Identification value.

Default setting: MakersRef, VendorRef

Portal - Prevent Update of Quotation When One is Selected

If set to TRUE, the system will not be able to import quotations which have been selected - that is, which have a vendor selected. If set to TRUE and no vendor is selected, the quotation will be imported. Set to FALSE, the quotations will be available for import whether a vendor is selected or not.

Default setting: FALSE

Portal - Show Error Messages During Portal Export

This parameter, if set to FALSE, allows Portal Export to continue uninterrupted in the event of errors occurring during export. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an export error occurs and further data export will be stopped until the error message is cleared by the user.

Default setting: TRUE

Portal - Show Error Messages During Portal Import

This parameter, if set to FALSE, allows Portal Import to continue uninterrupted in the event of errors occurring during import. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an import error occurs and further data import will be stopped until the error message is cleared by the user.

Default setting: TRUE

Portal - Store Imported XML Document in Portal Log

This parameter when set to TRUE, allows you to see the imported XML document associated with the selected error message in the Portal Log, accessed via the Options menu. If set to FALSE, there will be no Options menu available and no XML documents will be stored.

Default setting: FALSE

14.11.3.8 WorkFlow

Allow Work Flow On Locked Objects

If this parameter is set to TRUE, it allows the user to perform WorkFlow actions on objects

which are locked through the Work Flow definition.

Default Setting: FALSE

Restrict Work Flow Assign To Values

This parameter, when set to TRUE, will restrict the available users in the Assign To drop down list to those that have WorkFlow access defined for the resulting status. The list will contain all users that belong to groups with defined access.

Default setting: FALSE

Use in Maintenance

If you have developed a customised Maintenance WorkFlow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Maintenance > Work Orders > Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the process sequence of work orders.

Default setting: FALSE

Use in Purchase Forms

If you have developed a customised Purchasing WorkFlow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Purchase > Forms > Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the process sequence of purchasing forms.

Default setting: FALSE

Use in Purchase Quotation Compare

If you have developed a customised Quotation Compare WorkFlow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Quotation Compare Scenarios window Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the quotation comparison process.

Default setting: FALSE

Use in Vouchers

If you have developed a customised Vouchers WorkFlow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Vouchers window Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the process of creating and handling vouchers.

Default setting: FALSE

Use Revision

Set this parameter to TRUE to allow creating and using WorkFlow revisions. Once set to TRUE and revisions have been created, the setting cannot be changed back to FALSE.

Default setting: FALSE

14.11.3.8.1 Remote WorkFlow

These parameters control Remote Work Flow system-wide. When these are set correctly, Remote Workflow is enabled and can be switched on or off at user level.

Read about setting up and using Remote Work Flow in section 17.4.

Remote Work Flow - HTML Type

The setting of this parameter defines the kind of HTML file AMOS will produce for use in remote work flow communications. There are two options: HTML/XML and HTML/JSON. If you select HTML/JSON you will also need to set the JSON Library.

- HTML/XML - AMOS produces an HTML file containing an XML data island. This requires JavaScript to be enabled within the browser and is only supported by Microsoft Internet Explorer. This has always been supported by the AMOS Remote Workflow.
- HTML/JSON - AMOS produces an HTML file containing a JSON data island. This requires JavaScript to be enabled within the browser and is supported by most major web browsers, including Microsoft Internet Explorer.

Default setting: HTML/XML

Remote Work Flow - JSON Library

If you set 'HTML Type' to HTML/JSON you must define a JSON library. Several libraries are available on the Internet. For example, one such library may be found at:

http://ajax.googleapis.com/ajax/libs/jquery/1.3.2/jquery.min.js

Use this parameter to define a library and let AMOS know how to make the library available for the HTML file: either by referencing a URL or by including the library directly into the HTML file itself.

There are three values available when defining this setting:

- INTERNAL - uses the java script code found internally within AMOS, and inserts it into the HTML file. This increases the size of the HTML file.
- URL - links the URL you provide here into the HTML file; this will not considerably increase the size of the HTML file.
- FILE - takes the java script code contained in the library file you provide here and inserts it into the HTML file. This increases the size of the HTML file produced according to the size of the selected file. You indicate the location of the library file here. Keep in mind that AMOS does not verify the content of the file - it is inserted as it is.

Default setting: INTERNAL

Remote Work Flow - Mail Account Password

To perform workflow operations by email, the system needs to access an email account for sending and receiving those mails. This parameter is for setting the password for the user mail account.

Remote Work Flow - Mail Account User

Use this parameter to set a mail account user known to your mail server which can receive the outgoing mails from the system.

Remote Work Flow - Mail Attachment Extension

The HTML attachment sent within the email will have the file extension defined by this parameter setting. If you do not provide an extension, AMOS uses the default 'HTML'. User-defined extensions are limited to 10 characters.

Default setting: HTML

Remote Work Flow- Purchase Template

Enter the path and file name of an html page that has been customized to your company's specific format for Remote Work Flow. Perform this customisation by capturing a standard Remote Work Flow page and entering your source code in the appropriate section.

This will be presented to the user in the HTML attachment and will look similar to the normal Workflow transformation dialog.

Remote Work Flow- Return Mail Address

Use this parameter to set the mail address for the system which will receive the work flow data from the remote user.

Remote Work Flow- Send Mail

This must be set to TRUE. FALSE can only be used in the setup process (to avoid sending the mail), for debugging purposes.

Remote Work Flow- Use Remote Work Flow

Set this parameter to TRUE to allow use of remote work flow in your system. Set to TRUE users will have the option to turn remote workflow on in the Options window.

14.11.3.9 Reports

Report - Default Report Filter Button

This parameter is to determine which button on the Report filter should be the default when executing a report: OK or Print Preview.

Default setting: OK

Report - Logo Bitmap used in Report Printout

If you want to include your company logo on printed reports you should use this parameter to navigate to the file you want to use. The supported file types are:

.bmp .gif .jpg .jpeg .rle .wmf

Default setting: Empty

Report - Report Use Plain Style

Allows you to choose to print AMOS reports in grey scale mode. By default the reports are printed in colour gradients. If this parameter is set to TRUE, reports will be printed in grey scale.

Default setting: FALSE

14.11.3.10 Search

These two parameters apply to the 'sound' searching capability in the filters: that is, whether the word a user types sounds like another word in the list, or not.

Search - Indicator

This character is the indicator that whatever is typed next will be a 'sound' search, that is, the word the user is looking for 'sounds like' whatever is typed into the filter.

Default Value: §

Search - Sensitivity

Set a scale for sound searching sensitivity using this parameter. Higher sensitivity indicates that the filter results must be returned as close to the sound as possible. Lower sensitivity means that more results (less closely matched) can be returned.

Default setting: 10

14.11.3.11 System Access

System Access - Account Lockout Threshold

This parameter determines the number of unsuccessful log-in attempts a user can make before being locked out of the application. If the parameter is set to zero the lockout system will be disabled. A positive number above zero should be entered if you want to use this feature. If you are using this feature you will be informed of the number of any unsuccessful log-on attempts that have been made against your user name once you log-on successfully.

Default setting: 0

System Access - Allow Windows Login Verification

When set to FALSE, only a user's name and password defined in AMOS will be accepted at login. When set to TRUE, any user with their AMOS **Login ID** defined to match their Windows login ID, can enter their Windows password to log onto AMOS.

Default setting: FALSE

System Access - Create Log-In Audit Trail

This parameter, when set to TRUE, creates a log-in audit trail allowing you to track system usage. Use the menu item Tools > View Log-In Audit Log to access the recorded details. There is an access control item entitled Login Audit in the Registers tab which should be used to allow viewing of the audit trail. The log-in audit log is always read-only, even if Edit, Insert and Delete access rights have been granted.

Default setting: TRUE

System Access - Disable Account Period

Setting a number here indicates the number of days of inactivity on a user account (from the last logon) that can go by before the account is disabled. If a user exceeds the number of days at their logon attempt, their account will be disabled and they will receive a message. Set to 0, this parameter is ignored.

Default Setting: 0

System Access - Enforce Complex Password

This parameter determines whether complex passwords must be used or not. If this parameter is set to true, all passwords must contain at least 1 of the following:

- Upper Case Character
- Lower Case Character
- Alphabetic Character
- Non-Alphabetic Character

So, for example, an acceptable password could be Ab1.

When setting this parameter to TRUE for the first time, all users must be aware of the fact that passwords have been previously stored in upper case only. In order to change their password at their next log-in they will have to enter their old password in upper-case in order to continue.

NOTE: Changing this parameter to TRUE is irreversible.

NOTE: When running AMOS on a Citrix server and using complex passwords some conditions must be met to avoid being incorrectly prevented from logging on. If a user receives the message that AMOS is unable to log him/her in, the issue may lie in the Microsoft Windows user access setup. In this case it is advised to alter Windows user profiles status to non-Roaming.

System Access - Enforce Password History

This parameter controls how many previously used passwords for each user are retained in the system. When you are prompted to change your password, controlled by the Maximum Password Age parameter, you must enter a password that does not match one of the previously used passwords stored in the database. This also applies to the manual Change Password feature covered in section NO TAG. Setting this parameter to zero will disable this feature.

Default setting: 0

System Access - Idle Timeout

This parameter allows you to set the amount of time, in minutes, for which AMOS can be idle before it locks. Once this amount of time has passed, the windows will remain open but the logon dialog will appear and the current user's password must be supplied before access is allowed again. This parameter is disabled when set to 0. If enabled, the item Lock Application will also appear on the File menu and can be manually selected at any time allowing you to lock AMOS until you return to it.

Default setting: 0

System Access - Maximum Password Age

This parameter determines the maximum allowed age, in number of days, of all passwords. This feature is disabled if the value is set to zero.

Default setting: 0

System Access - Minimum Password Length

This parameter determines the minimum allowed length, in number of characters, of all passwords. This feature cannot be disabled as the minimum length must be at least 1.

Default setting: 1

System Access - Password Backward Compatibility

With the advent of the AMOS Business Suite Version 8.2.xx, a new algorithm was introduced to heighten security. This more secure password is stored in the AmosUser.DigitalSign field in the database. Versions of AMOS prior to 8.2.xx stored the less secure password in the AmosUser.Password table. Setting this parameter to TRUE will cause both fields to be updated; setting it to FALSE will cause only the AmosUser.DigitalSign field to be updated.

Exchanging password data between systems running on incompatible versions would cause problems, therefore this parameter must be set to TRUE where this is the case. Once a site has been upgraded, it can be set to FALSE.

Default setting: FALSE

14.11.3.12 Other

Ask User to Confirm Deletions

When this parameter is set to TRUE, the user is asked to confirm the deletion of a record. If set to FALSE, no question is asked, and the record will be deleted when Save is selected.

Default setting: TRUE

Base Currency Code

AMOS Business Suite makes it possible define a base currency at the global, installation and department level. At the global level, this value determines the base against which Current Rates are recorded. In addition, it is also possible to define the default currency to be used when recording transactions and presenting reports for the various installations and

departments

Default setting: USD

NOTE: If sites are to exchange information from the currency rates table then it is necessary for them to have the same global base currency defined.

Create Component Archive On Transfer In

A site that receives a Component from another site may want to see the Histories, Maintenance Logs, and Stock Transactions from the Component's previous sites. This parameter when TRUE allows the creation of Archive tables in receiving installations in order for the recipients to view component information created in previous installations.

Default setting: TRUE

NOTE: This parameter should be set to the same value as the Delete Component Archive On Transfer Out parameter.

Current Installation

This is one of the most important parameters in the system because it uniquely identifies the current installation with a number. This number must not be changed after initial definition.

Default setting: 001

Delete Component Archive On Transfer Out

A site that donates a Component to another site may want to delete the Histories, Maintenance Logs, and Stock Transactions for that Component. This parameter when TRUE allows the deletion of Archive tables in donating installations when the component is transferred out.

Default setting: TRUE

NOTE: This parameter should be set to the same value as the Create Component Archive On Transfer In parameter.

Edit Stock Item Currency and Price on Required Parts

This parameter controls the Currency and Price columns in the Required Parts tab of the Work Orders window. These columns default to the Last Purchase Currenc" and Last Purchase Price on the Stock Item. When this parameter is set to TRUE, the information in these columns is editable.

Default Setting: FALSE

Enforce Rate Upon Currency Code Registration

If set to TRUE in addition to the Code, Description, and Multiplier fields, the Valid From, Entered By, and Rate fields will appear on the Currency Code window when a new record is entered.

Default setting: FALSE

Export File Encoding

Select the character set used for native import and export files. This has no impact on files sent via AMOS Replication. Use this parameter to inform the system whether it should use ANSI or Unicode, in order to assign a unique value to all characters.

Default setting: ANSI

Hand Terminal Reader

This rarely used parameter allows you to specify an interface program that will transfer data from a Hand Terminal into AMOS. The data must be in a particular format.

Default setting: Empty.

Hide Inaccessible Menu Entries

When a user does not have access to certain menu items,setting this parameter to TRUE prevents these items from displaying. Any menu items that belong to modules that are not covered by the current license will also be hidden.

If this parameter is left as FALSE, unavailable menu items will continue to appear greyed out.

Default setting: FALSE

ID Number Series

All database entries in the system are stamped with unique internal numbers. These numbers are built up of two parts, the ID number and a running counter. The ID number ensures that no two sites can generate the same internal number. The Current Installation parameter is often used to define the ID part of the internal numbers, but this is not mandatory. Once an ID number has been defined and data is entered into the database, no other installation can ever be assigned the same ID number as this would lead to duplicate internal numbers.

Default setting: 001

Limit Global Search to Departmental Access

This parameter controls whether records belonging to a particular department are displayed as a result of a Global Search. When set to TRUE, only the results belonging to departments to which the user has access will be displayed.

Default Setting: FALSE

Limit Stock Types selection on Required Parts on Work Orders

This parameter defines which Stock Types are displayed in the list for adding them to the Required Parts tab of a Work Order. Setting this parameter to TRUE limits the Stock Types to types of which are registered against the department owning the Work Order. Set to FALSE, all Stock Types in the Select list are displayed.

This does not prevent the Stock Item from appearing there anyway if it is a Required Part for the Component the user is reporting work against. If the Stock Type is linked to the Component Type, it is always listed as a Required Part.

It is not possible to report this part as used regardless of this setting if it is not registered as a Stock Item in the department the user is working in.

Default setting: FALSE

Mailbox Notification Sent

The Work Flow Notification window is updated as new records are assigned to a mailbox. However, if a mailbox is shared or delegated, this parameter must be set to ALWAYS in order for all users who have access to the mailbox, to see the notifications.

Default setting: ALWAYS

Open Attachments In New Window

This parameter determines how a new image is displayed when an image hotspot is clicked. If the value is set to FALSE, a new image will be opened in the currently open window, and replace the image which is there. When the value is set to TRUE, a new image will be opened in a separate window.

Default setting: FALSE.

Printer Task to Use When Printing Labels

This parameter is used to select a Printer Task to use when printing labels from the Stock Items window.

Default setting: Empty.

Reload DDDW When Opened

DDDW stands for Drop-Down Data Window, the drop-down lists of currency codes, disciplines units job classes etc. present in the system. The contents of these drop-down lists in a window or dialog box are built when the window or dialog opens up, and are not rebuilt unless the window is closed and reopened. As a result, newly added items to the drop-down tables do not appear in a list until the window containing this list is closed and reopened.

Set this parameter to TRUE, and the system re-builds drop-down lists each time the list itself is opened by clicking on the drop-down arrow. Please note that this will slow down display of the list, but guarantee that the list is at all times complete.

Default setting: FALSE

Restrict Location Codes

No validation check is performed on location codes so it is possible that duplicate location codes can exist. When this parameter is set to TRUE, AMOS will prevent users from entering a duplicated code. Set to FALSE, AMOS continues to work as before and duplicate codes will be allowed.

Default setting: FALSE

Single Window Instance

This parameter controls whether or not you can have the same data window open several times. If set to true, a data window such as Components or Work Orders will only be allowed to open once. Any attempts to open the same window again will not work. If you want to view different information within the same window you can use the filter command to do so.

Default setting: FALSE

Start In Department

This parameter allows you to control which department the system logs automatically into when you start the system. When setting this parameter, you can select from a list of the defined departments.

Default setting: 001/01

Use 9 Digits For PK Counters

As of version 6.0.00, AMOS M&P (and now AMOS Business Suite) has the ability to use 9 digits for Primary Key counters as opposed to 6 digits. This parameter should be set to FALSE until all installations have been upgraded to version 6.0.00 or higher. When this has been accomplished, the parameter can be set to TRUE. The purpose of using the extra 3 digits is to avoid exhausting certain primary keys that may have high usage. New users of AMOS M&P 6.0.00 and above or AMOS Business Suite should set this parameter to TRUE.

Default setting: FALSE

Use Component Types

All Components registered will inherit information from a unique Component Type if centralisation of Component Types is chosen by setting this parameter to TRUE. When this parameter is set to TRUE, type-specific information will be grayed out on the Component screen and only users who can Edit Component Types will be able to change it.

When Component Types are used, the Component Type Number is shown on the Component screen.

Default setting: FALSE

Use Stock Types

All Stock Items registered will inherit information from a unique Stock Type if centralisation of Stock Types is chosen by setting this parameter to TRUE. When this parameter is set to TRUE, type-specific information will be grayed out on the Stock Item screen and only users who can Edit Stock Types will be able to change it.

Default setting: FALSE

Working Day Length

This parameter determines the amount of calculated work hours per day and can be set to any whole number between 1 and 24. Changes made to this parameter will be reflected in the timeline display for work planning: if the Estimated Duration of a job is twenty-four hours and the Working Day Length is twenty-four, then this Work Order will be done in one day. If, however, the Working Day Length is eight hours, the work will be spread out over three days.

Default setting: 24

14.11.4 Maintenance

Auto-File Completed CBM Work Order

If this value is set to TRUE, CBM work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Corrective Action Work Order

If this value is set to TRUE, automatically generated corrective action work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Periodic Work Order

If this value is set to TRUE, automatically generated periodic work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Requisition Work Order

If this value is set to TRUE, manually requisitioned work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Round Work Order

If this value is set to TRUE, automatically generated work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled CBM Work Order

If this value is set to TRUE, CBM work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Corrective Action Work Order

If this value is set to TRUE, automatically generated corrective action work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Periodic Work Order

If this value is set to TRUE, automatically generated periodic work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Requisition Work Order

If this value is set to TRUE, manually requisitioned work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Round Work Order

If this value is set to TRUE, automatically generated work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Allow Negative Value Of Counters

This parameter, when set to TRUE, will allow a user to enter a lower counter value than the one previously recorded. This facility can be used to correct values when counters are changed or if an error has been made during the reading or inputting of the previous amount. Note that this may affect certain counter based maintenance procedures. If the parameter is set to FALSE a user will be prevented from entering a lower amount and an error message will appear.

Default setting: TRUE

Auto Inherit Counters

If this parameter is set to TRUE, components installed in sub-functions will automatically inherit counter updates from the component installed in the respective parent function.

NOTE: For each sub-function component that is to inherit the counter updates, the user must go to the component's Counter tab and set the Depends On value to the correct parent function component.

When the Auto Inherit Counters parameter is set to TRUE and a component is removed from its sub-function, the Depends On value is removed automatically from that component's Counters tab.

Default setting: FALSE

AutoFilter WO By Discipline

When set to TRUE, the list of work orders is automatically restricted to the discipline that the user who is currently logged on belongs to.

Default setting: FALSE

Automatically Reschedule Work Orders

This parameter is useful during the process of establishing the AMOS database in the

organisation. By setting the value to FALSE, the program will not automatically generate work orders as components, counters and jobs are defined. This makes the process of entering such information more efficient. When this is completed, the parameter value is changed to TRUE, and you select Maintenance > Generate Work Orders to kick-start the generating of work orders. When set to TRUE, work orders are generated for component jobs whose component status has been changed (if a work order is needed according to the component job settings).

Default value: TRUE

Calculate Estimates for Component Jobs

This parameter may be set to Average or to Never. If set to Average, the program automatically updates the component job estimates. The values for Total Duration and Total Cost are estimated based on the duration and the cost of required parts and/or resources that have been reported

Default setting: NEVER

CBM File Name as Date

Set to TRUE to take the CBM file name as the 'Read Date'. AMOS will check that the CBM file name begins with an 8 digit sequence corresponding to a valid date in the YYYYMMDD format. If the validation fails, it will be entered in the CBM log and the readings will not be imported from the file. If the validation passes the reading will be added to the database with the Read Date taken from the file name. The logged date will follow the current timestamp.

Default setting: FALSE

Default Preference When Reporting Work

This parameter determines which default value is checked in the Report Work dialog box which appears when you select Maintenance > Report Work. The possible values are Component, Function and Work Order.

Default setting: COMPONENT

Function, Only Show Active Jobs

This parameter when set to TRUE, causes only active jobs to appear in the Functions Hierarchy window Jobs tab. Any inactive jobs will be hidden.

Default setting: FALSE

Hierarchy, Show Numbers

Set to TRUE, the function/component numbers will show in the hierarchy windows folder structure by default. Set to FALSE the numbers will not appear in the hierarchy until the user selects Options > Toggle Numbers.

Default: FALSE

Job Description Revision Control

This parameter controls revisions of maintenance job descriptions. Setting it to TRUE enables multiple versions of maintenance-type job descriptions to be stored in the Job Description table. There can only be one current active and one draft version of any job description. The job descriptions available when creating new records in component job, component type and requisition work are always of the status Active.

Default Setting: FALSE

Log Counters For Non-Counter Based Jobs

If this parameter is set to MANDATORY, reporting work against non-counter based jobs will require a mandatory counter value to be entered, providing that the component has a counter

association. If set to OPTIONAL, job counters will remain mandatory while component counters will be optional.

Default setting: NEVER

Log Job Rescheduling

Set to TRUE this parameter enables the rescheduling log. Every time a work order is rescheduled the reschedule log will be updated with information regarding the rescheduling. If the parameter is set to FALSE there will be no recording of rescheduling information in the log.

Default setting: FALSE

Log Work With Employee

This parameter determines whether work will be reported by discipline or by employee. Set to FALSE, work is reported by Discipline. Set to TRUE, reporting will be done on an individual employee basis.

Setting the parameter to TRUE in order to report work by employee also requires that at least one each of the User Defined Fields > Employee > 'bonus1' up to 'bonus4' and 'salary1' up to 'salary4' be switched on and then rates set for the activated fields in the **File > Open Register > Employees > Additional Info.** window. When reporting work, users can then select an employee in the Resources Used tab, and supply the hours spent per rate.

See the *AMOS M&P User Guide* > 'Reporting Work by Employee' for more information about configuring AMOS to report work by employee.

Default setting: FALSE

Maintenance Log Modification Warning

This parameter, when set to TRUE ensures that accidental modifications to the maintenance log cannot be made. If the user tries to alter information in the maintenance log a warning message alerting the user will appear. If set to FALSE the user can modify information without warning.

Default setting: FALSE

New Component Job Default Active

Set to TRUE, the Active checkbox on the Component Jobs window will be checked by default for new jobs. Set to FALSE, the box will be unchecked and the user must check it manually to activate the job. Deactivated jobs are not included when the first work orders for new jobs are generated.

When the parameter 'Automatically Reschedule Work Orders' is set to TRUE AMOS will respect the Active checkbox setting on the component job and only generate work orders for jobs where the checkbox is flagged.

Default setting: TRUE

Only Allow to Add Project WO for External Disciplines to Order Forms

Set to TRUE, a project job can only be sub-contracted if the Responsible Discipline assigned to it is an 'external' one. If the parameter setting is changed to FALSE, jobs with any discipline assigned can be selected.

Default setting: TRUE

Reason on Component Job Change

When set to TRUE, a dialog will appear on saving changes in the Component Jobs window. When users have changed a job's Required Disciplines, Periodic Frequency or Period, they will not be able to save the changes until they provide a reason in the dialog.

Default setting: FALSE

Report History by default

This parameter controls whether the Report History option when reporting planned maintenance work orders (rounds, periodic jobs) is switched on or off by default. It's possible to override the default setting on a component job or round itself.

Default setting: TRUE

Report Resources by default

This parameter controls whether the Report Resources Used option when reporting planned maintenance work orders (rounds, periodic jobs) is switched on or off by default. It's possible to override the default setting on a component job or round itself.

Default setting: TRUE

Report Stock Usage by default

This parameter controls whether the Report Stock Used option when reporting planned maintenance work orders (rounds, periodic jobs) is switched on or off by default. It's possible to override the default setting on a component job or round itself.

Default setting: TRUE

Report Work, Require Reason for Overdue Work

If this parameter is set to TRUE and the Date Done for reported work is later than the Due Date on the Work Order, the Overdue dialog opens and the user must enter a reason for the late work.

Default setting: FALSE

Report Work, Show Component parts

When this parameter is set to TRUE then the Stock Used tab of the Report Work window lists the required parts for a work order and any items reported in the Spare Part Log as well as any parts linked to the component on the work order.

Set to FALSE, the Report work window in the Stock Used tab lists only the required parts and any items in the Spare Part Log.

Default setting: FALSE

Require Reason For Job Rescheduling

This parameter, when set to TRUE, forces the user to input a reason for job rescheduling. If set to FALSE there is no requirement to enter a reason. Note that this parameter is ineffective if the parameter Log Job Rescheduling is set to FALSE.

Default setting: FALSE

Requisition work, Open Work Order Window

Set to TRUE, selecting to create a requisition work order from the main Maintenance menu or any relevant Options menu will bypass the Requisition Work dialog window and open the Work Orders window instead, with a new work order entry of type 'Requisition' already created in it.

Default setting: FALSE

Requisition work, Report History by Default

This parameter controls whether the Report History option when reporting requisition work orders is switched on or off by default. It's possible to override the default setting on a requisition work order itself or from the Requisition Work dialog window.

Default setting: taken from value of 'Report History by default'

Requisition work, Report Resource by Default

This parameter controls whether the Report Resources Used option when reporting requisition work orders is switched on or off by default. It's possible to override the default setting on a requisition work order itself or from the Requisition Work dialog window.

Default setting: taken from value of 'Report Resources by default'

Requisition work, Report Stock Usage by Default

This parameter controls whether the Report Stock Used option when reporting requisition work orders is switched on or off by default. It's possible to override the default setting on a requisition work order itself or from the Requisition Work dialog window.

Default setting: taken from value of 'Report Stock Usage by default'

Restrict Replanning Of Started Work Orders

If set to TRUE, it is not possible to re-plan (to move) a work order in the work planning timeline once the Started date has been set. This occurs the first time a user reports maintenance work against the work order.

Default setting: FALSE

Seconds Between each CBM Check

This parameter allows you to control the frequency at which the system checks for CBM activity.

Default setting: 180

Stock reservation trigger

This parameter determines when a Stock Item will show as Reserved on a Work Order. In order for this parameter to have any effect, the Stock Item must be in the Required Parts list on a Work Order and have an amount in the Reserved column.

In that case, if the value is set to Work Order Status, as long as the Work Order has the status Planned or Issued, then the Stock Item will show as Reserved.

If the value is set to Work Order Status and Window, not only does the Work Order status matter, but also the value of the Window: that is, the number of days prior to the actual Due Date that the system will consider the Work Order as due.

Default setting: Work Order Status and Window

Use Job Dependencies

If this parameter is set to TRUE, you can configure links between two or more component jobs inside the Jobs window (accessed from the Components window). These links can also be configured in the Job Planning window graphical timeline.

Default setting: FALSE

Use Maintenance Task

If Maintenance Tasks is part of your licence and this parameter is set to TRUE, Maintenance tasks will be used in planning. The user can view outstanding stock quantities on forms for Maintenance Tasks in the Stock Wanted window in a field called Outstanding Tasks.

Default setting: FALSE

View Counter From Functions Perspective

Counter updates can be done based on the Function or Component number. In a centralised database, it would be most common to track runtime by Functions, therefore this parameter would be set to TRUE. The Update Counters facilitywould then be filtered and viewed from a

functions perspective rather than a component perspective.

Default setting: FALSE

Work Order Tracking Accuracy

This parameter controls the level to which Work Orders are tracked. The two possible parameters are Date Only and Date/Time. Date Only lets you plan work by date whereas Date/Time lets you plan to the nearest 15 minutes.

Default setting: DATEONLY

14.11.5 Payroll

Payroll Calculation Period

Set this parameter to calculate the number of days for each month. Setting EXACT DAYS causes every month to be calculated exactly: i.e. January 31 days, February 28 (or 29) days etc. Selecting FIXED 30 DAYS causes all months to be calculated with 30 days regardless of the actual number of days.

Default setting: EXACT DAYS

Payroll Current Period

Use this parameter to set the starting year/month for payroll calculations.

Summarise Payroll Transactions

When a crew member has two contracts on the same vessel, for example by fulfilling two different ranks, AMOS will add up the amounts owed for the payroll and show the overall total on the payslip. To allow for the option of keeping separate totals, set this parameter to FALSE.

AMOS will consider the parameter setting and show amounts in the payslip accordingly.

Default setting: TRUE

Variable Transactions - Default Wage Type

Use this parameter to define a default wage type to be added automatically when you insert new variable transactions into the Variable Transactions tab in the Employee Overview window.

Variable Transactions - Identification Filter

Wage Types can have an Identification value assigned in the Wage Type register: Undefined, Variable, Fixed or Calculation. Set this parameter to TRUE to restrict the list of wage types presented for selection when defining variable transactions, according to the identification values. When a user clicks the Wage Type lookup in the Variable Transactions window AMOS will first present a dialog where the user can select which Identification(s) to filter by. Then, only Wage Types with the matching Identification will be presented for selection.

Set to FALSE, all wage types will be presented in the filter regardless of any identification values.

Default setting: FALSE

Variable Transactions - Payroll Currency Code

Set the default currency code for variable transactions using this parameter. The standard currency is defined in the company and vessel registers.

Variable Transactions - Show <>

When any of the parameters in this group is set to TRUE, the relevant field and content will be displayed in the Employee Overview Variable Transactions tab.

14.11.6 Personnel

Employee Planning - View Months From Now

Use this parameter to set the number of months from now that should be visible in the Employee Planning window.

Address Format

Different countries have different standard layouts for addresses. This parameter defines the format to be used when registering and displaying the employees' addresses. Move the characters to change the order of the fields.

Default setting: 123TZSC

Where 1, 2, 3 = street address

T = Town/city

Z = Zip or post code

S = State

C = Country.

Employee Number Sequence Max

This parameter defines the maximum number that can be used in the Employee Number. This can be used to reduce errors. Clearing the values from both this parameter, and the Employee Number Sequence Min parameter, enables the user to avoid auto-numbering in the Crewing > Employee window.

Default setting: 2000

Employee Number Sequence Min

This parameter defines the smallest number that can be used in the Employee Number. This can be used to reduce errors. Clearing the values from both this parameter, and the Employee Number Sequence Min parameter, enables the user to avoid auto-numbering in the Crewing > Employee window.

Default setting: 1 (number begins at 0001).

Leave Days - 30 Days Deduction

When this parameter is set to TRUE, leave days are calculated with 30 days every month. Set to FALSE, leave days are calculated according to exact days per month.

Default setting: TRUE

Store Documents in the Database

You can attach picture files, document files etc. of certificates, passports, visas and other documents to the employees' records. This parameter tells the system whether or not the files are to be stored in the database. If they are not to be stored in the database, set this parameter to FALSE and then go to the Directories > Crew Member Document Directory parameter and define where you want the files to be stored.

Default setting: TRUE

14.11.7 Purchase

Output - Mail Attachment Type

When printing a purchase order form to email, AMOS converts the purchase order to an

attachment in order to send it with the email. The setting of this parameter tells AMOS what type of file type to use for this attachment.

Note that if the setting is left as NONE, sending email from the Purchase module is prevented.

Default setting: NONE

Auto Set Delivery 'Portal Queue'

When using e-Business Direct, you can set this parameter to automatically flag the Portal Queue checkbox on NEW, UPDATED or ALL deliveries. By default, the checkbox will Never be marked. If the box is checked, the delivery form is then automatically set to be sent with the next portal export.

Default setting: NEVER

Auto-Calculate Form Estimate

This parameter is used to determine if the form estimates are automatically calculated and updated if the amount is changed. If the parameter has been set to FALSE, it is possible to perform the calculation manually by selecting Estimate cost from the Options menu.

Default setting: FALSE

Auto-File Fully Received Form

If this parameter is set to TRUE, forms that have been fully received will be filed without prompting.

NOTE: The value of this parameter is ignored when Work Flow on Purchase is in use.

Default setting: FALSE

Auto-Fill Delivery Details

When this parameter is TRUE, the following values get copied from the Order Form to its Deliveries:

- Latest Delivery Date – Advised Ready
- Vendor – Forwarder
- Delivery Address – Destination

Default setting: FALSE

Auto-Set `Budget Date'

If this parameter is set to TRUE, the field Budget Date is set to the current date (Today) when a user prints an original purchase order. If setting the Budget Date to Today means that the budget code is not valid on that date, the form will not be printed. For example, if you create an Order Form during 2005 and attach a 2005 Budget Code to it, but don't print the Order Form until 2006, the 2005 Budget Code will not be valid and you will receive an error message.

Default value: FALSE

Auto-Update Multi-Vendor Details from Line Item

If the value is set to TRUE, then the data set for Purchase Unit, Factor, Currency, Price, %Discount, and Delivery Time on the Quotation Line Items, will update the Stock Item's Vendors tab for that Vendor. Additionally, the Vendor Ref. and Description fields[1] on the Quotation Line Items will be editable (according to user access in that window) and changes to

[1]The Vendor Ref. and Description fields on Quotation Line Items are only available for stock lines, not service lines or quotation-specific alternative lines.

them will update the Stock Item's Vendors tab.

If the user decides not to enter information at the Quotation Line Item level, then the Order Line details will carry over to the Vendor tab so long as that Vendor is the Form's Vendor.

Set to FALSE, no updates will be made to the Vendors tab. Also, editing the Vendor Ref and Description fields will be prevented.

Default value: TRUE

Auto-Update Stock Details from Line Items

This parameter allows the system to update Stock Details with details entered in a Line Item. Set this parameter to FALSE to prevent stock items updating automatically.

Default value: TRUE

Best Purchase Price Evaluation Period

To help you establish the best possible purchase price on stock items and limit the records presented in the Purchase History window, you can apply a default time period (days, weeks, months) to individual stock classes: for example the time frame you want to review would be longer on spare parts than on consumables like fuel oil. AMOS will then show you the historical purchasing information and flag the best price for relevant stock inside of the set time frame only.

If you are not using stock classes, or you have stock without a class defined on it, you can set the same time period using this system parameter. In this case, the set period applies to:

- any stock which is without a stock class, and
- any stock which does have a stock class defined, but there is no best purchase period set on that class.

Default value: M3

Clean Up 'For Component' In Stock Wanted

This parameter, when set to TRUE, will clear any entries made in the For Component column of the Stock Wanted window once the desired forms have been generated. If the parameter is set to FALSE the component number in the For Component column will be set as the default value for that stock item and will be automatically entered in the column each time the Stock Wanted window is opened. To select a default component click the lookup button. The parameter Component Search Range in Stock/Wanted determines whether you are presented with a list of components associated with the selected stock item or a list of all existing components when clicking the lookup button. This parameter is found in the Parameters > Options > Stock section.

NOTE: If a stock item has only one component associated with it, the component number will be automatically inserted into the For Component column regardless of the value of this parameter.

Default setting: TRUE

Close Quotation After Query Select

This parameter, when set to TRUE, will automatically save all changes and close the quotations window after you select a vendor. If the parameter is set to FALSE the user will have to save changes and then exit the window in the normal way.

Default setting: FALSE

Commodity Purchase

Normally, Form Generation breaks orders apart based on the Preferred Vendor. If this

parameter is set to TRUE, Purchase Forms (of all types) can be grouped according to Stock Class and an Order Form can only contain Line Items that belong to the same Stock Class. Even if the Preferred Vendors are the same, Stock Items of different Stock Classes will not be grouped together.

Default setting: Empty

Component Search Range in Order Lines

When adding a line item to a form in the Purchasing module, the stock number for the item to be purchased must be entered and then the specific component to purchase it for defined.

By default this parameter is set to Any which has the effect that if you press the lookup button next to the line item Component field, a complete list of components is presented.

However, AMOS allows you to attach a list of stock items to a component if you wish, tying for example spare parts to a piece of equipment. By setting this parameter to Restrict, only those components to which the selected stock item is attached are listed.

Default setting: ANY

Copy Stock Item Details to Line Item

When set to TRUE, upon either manually or automatically adding a stock item as a line item to an order form, the details registered on the stock item itself will be copied to the line item details on the form. Later, if the stock item's code is removed from the line item AMOS will check if the details on the line item are the same as the details on the stock item and if so, clear the details as well. However, if the details have been altered on the line item, AMOS will ask the user to confirm the deletion of the line item details first. If this parameter is set to FALSE, the details will not be copied or removed.

Default setting: FALSE

Create New Form On Form Conversion

If this parameter is set to TRUE, performing a conversion will create a new form containing the order information and the existing one will take the status Filed.

Also note that when set to TRUE and a user splits a line item to a sub-form, on the Form Splitting dialog the Form Type to split to will be set to the same type as the originating form type. Selecting another type will not be possible.

Default setting: FALSE

Form 'Generic Queue' field

This parameter facilitates the interface between AMOS and other systems used to handle purchasing and/or accounting data. When the option When Printed is checked, the Forms Queued For Transfer indicator is set when an original purchase order is printed. When the option When Approved is checked, a form is queued for transfer when it is approved. When the option When Received is checked, a form is queued for transfer when it is received.

Default setting: 0 (no value checked).

Form Status After Query Select

This parameter determines what the Form Status will be after selecting a Vendor in the Order Form’s Quotation window.

Default setting: UNCHANGED

Form Type After Query Select

This parameter determines what the Form Type will be after selecting a Vendor in the Order Form’s Quotation window.

Default setting: UNCHANGED

Inherit Delivery Priority from Purchase Form

Set to TRUE, the priority on a purchase form will be inherited on any deliveries created for that form.

Default setting: FALSE

Interrupt Automatic Form Creation

There are three options for setting this parameter. Set to IF MISSING INITIAL VALUE, the system will check for initial values and present the Mandatory Fields window only if values are actually missing. The user must then enter the values and click OK to continue. Set to ALWAYS, the system will interrupt Automatic Creation of forms and present the Mandatory Fields window (whether values are missing or not) for the user to enter values if necessary, and click OK to continue with form generation. Set to NEVER, the system will carry on with automatic form generation regardless of whether any initial values are missing from mandatory fields or not, creating the forms with database default values.

This setting also determines whether or not the List Newly Created Forms checkbox on the Form Creation dialog is checked by default and whether or not the user can uncheck it. If the value is NEVER then it is unchecked by default but can be checked; if set to IF MISSING INITIAL VALUE or ALWAYS then it is checked by default and cannot be unchecked.

Default Setting: NEVER

Level of Approval

AMOS supports three methods of form approval:

- None
- Signing
- Actual approval

With NONE selected, approval is not required before an original purchase order can be printed. With SIGNING selected, someone with password authority to approve forms can approve the form using any legal user name. With ACTUAL APPROVAL selected, someone with password authority to approve forms can approve the form using only their own user name.

Default setting: ACTUAL APPROVAL

Line Items Displayed by Default

The setting of this parameter determines which line items - active, cancelled and split - are shown by default on purchase forms, and how the window 'Show All' option works.

- When set to ACTIVE, only active line items appear by default. Selecting Options > Show All displays active, cancelled and split items. Toggling the option returns the list to active items only.
- When set to ACTIVE AND SPLIT, active and split line items appear by default. Selecting Options > Show All displays active, cancelled and split items. Toggling the options returns the list to active and split items only.
- When set to ALL, active, split and cancelled line items appear by default. Selecting Options > Show All displays only active items. Toggling the option returns the list to all items.

Default setting: ACTIVE

Link Stock Class To Order Form Content

This parameter controls whether or not stock classes can be linked to Order Form Content descriptions such as Goods, Service Orders, Projects, etc. When set to TRUE an extra column appears in the Stock Classes register called Order Form Content and contains the values

defined in the Order Form Content register. Only one content entry can be selected per stock class; however, multiple stock classes can be linked to the same content entry.

Then, when a content description with stock classes linked to it is entered on a form, only the items belonging to the linked stock classes can be added as line items to that form. Furthermore, when forms are generated automatically the required items will be separated by content: that is, all items in all stock classes assigned to the content entry 'Goods' will be grouped onto one form, etc.

When set to FALSE, stock classes cannot be linked to content descriptions and the descriptions can simply be selected on the Forms window without restrictions.

Default setting: FALSE

Lock Approved Purchase Orders

If this parameter is set to TRUE, any Purchase Orders that have been approved are locked for all editing. This includes all the line items for the form.

A locked Purchase Order cannot be edited unless the user is a member of a group that has access in the Access Control window > Functions tab to Edit Approved Purchase Orders. Once a form is locked, the user cannot convert the locked Form to a Form of another type. The user must also have edit access to Forms and to the particular status of Purchase Order.

Default value: FALSE

Lock Approved Requisition Forms

If this parameter is set to TRUE, any Requistion Forms that have been approved are locked for all editing. This includes all the line items for the form.

A locked Requisition Form cannot be edited unless the user is a member of a group that has access in the Access Control window > Functions tab to Edit Approved Requisiton Forms. Once a form is locked, the user cannot convert the locked Form to a Form of another type. The user must also have edit access to Forms and to the particular status of Requisition Form.

Default value: FALSE

Lock Exported Requisition Forms

If this parameter is set to TRUE, any Requisiton Forms that have been exported are locked for all editing. This includes all the line items for the form.

A locked Requisition Form cannot be edited unless the user is a member of a group that has access in the Access Control window > Functions tab to Edit Exported Requisition Forms. Once a form is locked, the user cannot convert the locked Form to a Form of another type. The user must also have edit access to Forms and to the particular status of Requisition Form.

This parameter is useful in preventing changes to Forms after they have left the remote site/vessel. However, office groups must have access rights to edit the Forms in order to work on them.

Default value: FALSE

Lock Line Items According to Stock Access

If set to TRUE, this parameter locks an Order Form's Line Items based on the Stock Class Access set up to prevent unauthorized access to Stock Items. The fields locked are the Part Name, Maker's Ref., Extra Info., and Unit fields.

Default setting: FALSE

Lock 'Ordered' Form Fields

Certain fields on a Purchase Order can be locked and rendered inaccessible for editing, after the Form has been ordered. These fields are Budget Date, Budget Code, Ordered, Estimate, and

Currency. The option to Estimate Cost is also unavailable. These fields cannot be edited unless a user is a member of a group that has access in the Access Control window > Functions tab to Edit Ordered Form Fields.

Default value: FALSE

NOTE: Even if Restrict is selected, you can still enter the number of any component by hand if you wish.

Multiple Departments In Order Forms

This parameter, when set to TRUE, allows Order Forms originating from other departments to be viewed and modified in the current department. Select the desired department from the Department drop-down list in the Purchase > Forms filter window. This does not allow for the creation of new Order Forms, and the number of departments available depends on the users' global access rights. To use the Split, Copy, Convert and Receive Order Forms functions and to Add or Update Line Items against an Order Form in the Slopchest module, set this parameter to FALSE.

Default setting: FALSE

Ordering from Stock Wanted, Delivery Location is Mandatory

When set to TRUE, users can select a default delivery location for all items placed onto order forms generated from Stock Wanted, regardless of whether each item is tied to a contract or not. If no valid contract is available, AMOS will disable the Delivery Location field and add a tooltip to inform the user that no contract is available.

Default setting: FALSE

Origin on Line Item Level

Setting an origin on a purchase form indicates the departmental division which the selected form was created from: for example, 'Deck' or 'Engine' inside the Maintenance department. This parameter controls whether the Origin field is displayed on the Line Items window too.

Set to NEVER, the field is hidden on the Line Items window. Set to ALWAYS, the field appears and individual line items inherit the origin value from the form header. Set to ASK, if the user changes a form header's origin AMOS will ask whether the value should be changed on the form's line items, too.

Default setting: NEVER

Prevent Quotation Synchronisation

The setting of this parameter determines whether or not any changes in order form line item windows are synchronised into the quotation lines. Set to NEVER, synchronisation is never allowed. Set to WHEN SENT, synchronisation will be prevented if one or more quotations are marked as sent. Set to WHEN RECEIVED, synchronisation will be prevented if one or more quotations are marked as received.

Default setting: WHEN SENT

Quotation Compare, Auto Add History

As users make changes to a quotation comparison scenario in the matrix, AMOS can keep read-only records of the previous configurations in the History tab. History can be created manually, or automatically. The changes which trigger automatic history creation are controlled by this parameter.

- NEVER. History is never created.
- CANCEL ORDER LINE ITEM. When a user cancels an item from the current comparison scenario, before actually removing the item AMOS stores the current scenario matrix in the History tab.
- SPLIT ITEM. When a user splits an item away to purchase it on another form, before actually removing the item AMOS stores the current scenario matrix in the History tab.
- BOTH CANCEL AND SPLIT. AMOS stores the current scenario in the History tab before cancelling or splitting away any item.

Default setting: NEVER

Require Estimated Cost for Approval

This parameter, if set to TRUE will prevent a user from granting approval for a purchase form if the Estimate field in the Cost Overview section of the window is zero.

Default setting: FALSE

Reset Purchase Counter On Financial Year

This parameter, if set to TRUE, will reset the number series for Form, Purchase Order, Query and Requisition Form on the first day of a new financial year. This is determined by the parameter Start Date for Financial Year. If the parameter is set to FALSE, the reset will occur on the first of January each year.

Default setting: FALSE

Restrict Original PO Printing

If set to TRUE, this parameter restricts the printing of original purchase orders without a valid budget code or an estimate.

Default setting: FALSE

Set Date Automatically During Receipt

This parameter controls whether the Receipt Date field of a purchase order is filled in automatically during receipt. When set to FALSE, the user must enter the receipt date manually.

Default setting: TRUE

Use Latest Delivery Date of Order Lines

This parameter, when set to TRUE, activates the Latest Delivery Date field for the purchase form header and line items.

Default setting: FALSE

Use Quotation 'Discount Given'

There are two places to enter discounts on Quotations: one is in the field % Discount Given at the Quotation header level; the other is the field % Discount at the Quotation Line Item level. The value at the Quotation Line Item level will always apply to the Line Items. The value at the Quotation header level will only apply to the Line Items if this parameter is set to FALSE.

When this parameter is set to FALSE, if the user changes the Quotation header level discount, a dialog appears with three options to update the Line Item discounts (No change, Replace with new, Add new to existing).

Default setting: FALSE

Use Vendors' Price

When adding items to an order form, the system automatically fills in the line item details from

information contained in the Stock Item window.

Set to TRUE, the default values for Price, Unit and Factor in the Purchase Until section of the Order Line will come from the information in the Vendor tab on the Stock Item window. If there is no vendor information available, the values are taken from the Stock Item's Prices section.

If this parameter is set to FALSE, the system instead uses the Last Purchased Price and Currency in the Prices section of the Stock Item window.

Default setting: TRUE

Validate Order Form Dates

If this parameter is set to true, all dates entered on purchase forms will be checked to make sure they follow a logical date sequence, see below:

CreatedDate Date 'Created:' is registered

ApprovedDate Date 'Approved:' is after CreatedDate and before OrderedDate

OrderedDate Date 'Ordered:' is after CreatedDate and before ReceivedDate

ConfirmationDate Date 'Confirmed:' is after OrderedDate

ReceivedDate Date 'Received:' is after OrderedDate

LatestDeliveryDate Date 'Latest Delivery Date:' is after CreatedDate

Default setting: FALSE

14.11.8 Self Assessment

Not Applicable Score

To enable a N/A score, the N/A needs to be converted to a percentage so that it is possible to calculate the overall KPI score. This parameter determines whether N/A equals 0% or 100%: set to N/A=0% gives N/A a score of 0, and set to N/A=100% gives N/A a score of 100. Once set, the N/A Option checkbox has to be checked in the Self Assessment Configuration window, for any applicable KPIs.

Default setting: N/A=0%

Sub Element Start Code

Use this parameter to set the starting code for sub-elements: should the first sub-element within an element have no code (followed by the next with code A, B, etc.) or should the first sub-element have code A (followed by B, C, etc.). These are indicated by setting <SPACE> for no code, or A.

Default setting: <SPACE>

Yes No Score

To enable Yes/No scoring, the yes and no need to be converted to a percentage so that it is possible to calculate the overall KPI score. This parameter determines whether Yes equals 0% or 100%: set to YES=0% AND NO=100% gives Yes a score of 0, and set to YES=100% AND NO=0% to gives Yes a score of 100. Once set, the Yes/No Answer checkbox has to be checked in the Self Assessment Configuration window, for any applicable KPIs.

Default setting: YES=0% AND NO=100%

14.11.9 Stock

Allow Removal of more Items than in Stock

This parameter controls whether a user is allowed to use or remove a greater quantity of an

item than is actually registered as being available in stock. This is relevant in some installations where a strict reporting of stock movement is not practised, or when stock items may be removed directly from transit storage or received shipments before they have been registered as received in stock.

Default setting: TRUE

Approval Required For Stock Transfer

This parameter determines whether approval is required for transfer of stock items between installations. If the parameter is set to TRUE, a receiving installation will not be able to see a transfer document until the status has been set to Approved at the donating installation.

Default setting: TRUE

Component Search Range in Stock > Wanted

When modifying a quantity in the Stock > Wanted window, the component number that the stock item is required for may be entered. If there is only one component associated with the stock item then that number is automatically inserted in the For Component column. If, however, there are several components associated with the stock item, click the lookup button to choose the component number you require.

If this parameter is set to Any, clicking the lookup button causes a complete list of all components to be shown. If this parameter is set to Restrict, only the components associated with the stock item will be shown.

Default setting: ANY

NOTE: Even if Restrict is selected, you can still enter the number of any component by hand.

In/Out of Stock on WO of Status

Stock usage can still occur after a work order has been reported and finished. This parameter controls whether or not users can report stock movement in the In/Out of Stock window against Work Orders with status Completed and Filed, as well as against Active Work Orders.

If this parameter is set to allow recording stock movement against completed or filed work orders in the In/Out of Stock window and a user selects a work order with one of these statuses, AMOS will warn the user that the transaction will be reported against a job which is already finished and allow the user to continue.

Allowing stock usage to be recorded against finished work orders ensures that all stock reported used against a work order is taken into consideration in the statistical information for that work order.

Default setting: ACTIVE

Inherit Full Description From Parent

If this parameter is set to TRUE, child stock types that do not have a full description of their own automatically inherit that of the parent stock type. If the description for the child stock type is subsequently altered it is saved as the new description for the child stock type only.

Default setting: FALSE

List All Transfer Documents

If this parameter is set to TRUE, the installation lists all the transfer documents that have been submitted from all installations. This may be quite useful at the main location if the parameter Approval Required for Stock Transfer has been set to TRUE. At the main installation, it will then be possible to list all the transfer documents in order to evaluate which should be approved.

Default setting: FALSE

Propose Work Order Required Parts

Allows the system to suggest values when performing an In/Out of Stock transaction for a Work Order.

Default setting: FALSE

Record Stock Usage When Reporting Work

This parameter restricts the ability to report stock usage against a work order, in order to stop double reporting of stock usage, both in reporting Work Orders and In/Out of Stock functions.

Default setting: TRUE

Stock Control: Populate 'Actual' Column

This parameter determines the value which appears in the Actual column in the Stock Control window, for each listed stock item. There are three possible settings:

- In Stock - the Actual column will be populated automatically to match the In Stock column.
- None - the Actual column will contain no values at all.
- 0 - the Actual column will contain a 0.

Default setting: In Stock

Stock Price Logged

This parameter indicates whether you want the average or last purchased stock price to be used when calculating stock values.

Default setting: AVERAGE

Stock Reservation, Required Booking

If set to TRUE, your system will require advance booking of parts, and users will see a field called Booking Window, and a checkbox labelled Dynamic Booking in Component/Component Type Jobs > Required Parts.

Default setting: FALSE

Update Stock Status, With Status Change on CompSpare

Stock Types can be listed as parts for Component Types, and the status on a part can be changed in the Component Type window Parts tab to define the state of the selected part in reference to the equipment it belongs to. If this parameter is set to TRUE, when the status of stock is changed on CompSpare level and no other active instances of that stock type are registered against any other equipment, the stock type itself will be updated with the status defined on the part at CompSpare level. If this parameter is set to ASK, AMOS will present the message 'This is the only active reference of this stock to Components remaining, do you want to update the Stock Type?' and the user can choose Yes or No. Set to FALSE, the status is not changed on the Stock Type.

Default setting: FALSE

Use Stock Class Access

This parameter, when set to TRUE, allows you to restrict the various stock classes that can be accessed by each group of users. The access control is to be found in the menu option Tools > Configuration > Groups > Options > Stock Class Access. Note that if you want to restrict a group's Stock Class Access, you must define the stock classes available to every group otherwise a group without defined stock classes will only be able to access stock items with unspecified stock class.

Default setting: FALSE

Use Stock Item Depreciation

This parameter, which must be set before any stock items are entered into the system tells the system whether to use stock item depreciation. Depreciation levels are set at Tools > Configuration > Depreciation Levels.

Default setting: FALSE

14.11.10 Voyage

IMOS Installed

Set this parameter to TRUE if you have IMOS installed on your system. Set to TRUE, this parameter prevents the creation of any voyages/cargoes in AMOS.

Default setting: FALSE

Import Cargo Group

If you receive a cargo specification from IMOS referencing a cargo type not already defined in AMOS, the cargo type is automatically created. To create the cargo type AMOS needs a cargo group. The Import Cargo Group parameter defines the cargo group for cargo types created during import from IMOS.

Default setting: There is no default setting. This parameter must be set manually by the installation engineer.

Lock Completed Voyages

When this parameter is set to TRUE, you cannot make changes to the details of any completed voyage.

Default setting: TRUE

Lock Discharged Cargoes

When this parameter is set to TRUE, you cannot add any new operations or events to completed cargo discharge procedures.

Default setting: TRUE

Lock Planned Port Calls

When this parameter is set to TRUE, you cannot make changes to the details of any planned port calls.

Default setting: TRUE

Lock Planned Voyages

When this parameter is set to TRUE, you cannot make changes to the details of any planned voyage.

Default setting: TRUE

Lock Sailed Port Calls

When this parameter is set to TRUE, you cannot make changes to the details of any sailed port calls.

Default setting: TRUE

Unassigned Cargo Department

When a cargo is initially created it may not immediately be assigned to a particular department. This parameter defines the default department responsible for newly created, unassigned cargo unless/until it is assigned to a specific voyage.

Default setting: There is no default setting. This parameter must be set manually by the installation engineer.

14.12 Sharing

Although some information may appear to be available from only within a single installation or department, all information is actually stored in the same set of database tables regardless of which installation or department they belong to. For the system to be able to show information belonging to a particular department, it has been necessary to stamp all table entries with a marker indicating which department they belong to. This mechanism works well for departmental types of information such as components, stock items etc., but does not suit for information to access at a more global level e.g. addresses disciplines, job classes and the like.

This set of parameters, one for each table in the database, control how the information contained/owned by one department is shared out such that it can be accessed by other departments.

There are also three special parameters controlling how the data contained in a table are shared between departments.

For example, an address register has been established in Inst/Dept 001/01, all addresses will have been stamped as owned by that department. Unless sharing is defined, these addresses will only be accessible from Inst/Dept 001/01. To share these addresses such that all departments have access to them, select to modify the Global Sharing parameters. Then choose the Sharing tab and on the parameter entry reading Addresses, specify Inst/Dept 001/01 from the list of defined departments. The addresses will now be accessible from every department.

The same feature can also be used to share information across all departments of a particular installation by defining sharing at the Installation level, or even at the Department level thereby sharing a single set of data between two departments.

As described at the beginning of this section, parameter values are inherited downwards from the global to the department level. For example, if a user logs onto to Inst/Dept 002/03, the system first checks to see whether sharing has been defined for department 002/03. If nothing is defined, the system then checks to see whether sharing has been defined for installation 002. If nothing is defined, the system then checks to see whether sharing has been defined at the global level. If no sharing definitions are found, the system then defaults to fetching information stamped as owned by department 002/03 (e.g. the current installation and department).

If you intend to use the component transfer facility within AMOS, you will need to ensure that global sharing is allowed for the following tables:

- Address Component Class
- Component Type Counter Type
- Discipline Employee
- Image Reference Image Reference/Hotspots
- Image Reference Links Image Source
- Job Class Job Description
- Maintenance Cause Maintenance Class
- Maintenance Criteria Maintenance Type

NOTE: When defining data sharing, data access rights and data synchronisation, it is very important that you consider the data ownership (office or vessel) and consequences of the import and export rules you apply, not only at table level but even at field level. For example, sharing on a component/job record is normally defined at installation level, but very often the owner of the information is not defined. In these cases, the office (technical department) might insert new records and update the frequency while the vessel updates the last done date and the next due date. With both vessel and office making changes, the import and export rules must be properly defined and modified from the standard ones.

14.13 Transaction Codes

Transaction Codes can connect expenses to a specific budget dimension, such as Responsible or Project. The codes themselves are not directly connected to the budget.

To activate and use Transaction Codes:

1. Define these parameters.
2. Enter values for the defined codes in the Transaction Codes register.

To define the parameters:

Click on the Transaction Codes folder to expand it. There are ten Transaction Code Levels, for each of which you can define a status and a label.

1. Select a Level and use the lookups to assign a status, either globally or by installation/department. There are three possibilities:
   - **Mandatory** - every transaction must have a value for this code
   - **Optional** - up to the user
   - **Not Used -** this code is not in use
2. Next, select the **Label** parameter for the same Level. Enter a name to identify the transaction code level by. Codes belonging to this level will be identified with the label you provide. For example, Responsible or Project.
3. **Save** your work before exiting the window. Go to **Tools > Configuration > Stock > Transaction Codes** to open the Transaction Codes register and enter values for the defined codes.

Read more about Transaction Codes and how to set them up, in Chapter 26.

14.14 User Defined Fields

Many windows in the system have a number of fields with no predefined function or title, and can be used as required in order to meet company or department specific needs. These are called User Defined Fields, and may be found on most data screens throughout the system.

This set of parameters allows the user to define the screen leader texts of the user-defined fields when shown on screen. Unless they are in use, such fields should be empty. Once a label is entered for a UDF, the field will appear on the screen in the relevant window.

CHAPTER 15 Number Series

Several items registered in AMOS are automatically numbered by the system; new work orders and components are assigned numbers by the system.

Go to **Tools > Configuration > Number Series** to open the filter for the Number Series window. The **Series Type** list contains the different types of number series available in the system.

The Number Series window is for initialising the various number series. In the Auto-Numbering folder in the Parameters window you can define input masks to determine which characters to use when registering data of the different types and rules to determine how numbers are generated by AMOS.

See section 14.7 about the Auto Numbering folders in the Parameters window.

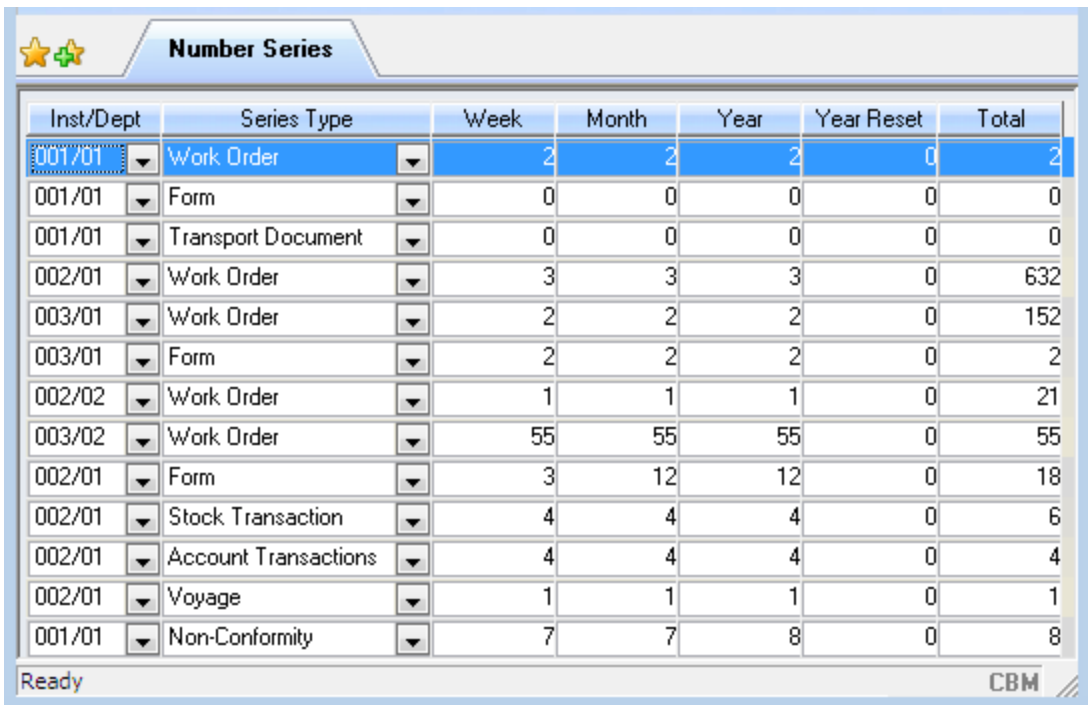


Figure 75 The Number Series window

The **Installation/Department** column corresponds to the rules you create. The Number Series Sharing determines the **Inst./Dept.** values. For example, if you share the Address Number Series globally out of Installation/Department 001/01, then only one entry for 001/01 is required here. If you share the Form Number Series at the Installation level, then each Installation must have a Form Number Series entry. See section 14.12 about sharing.

This also depends also on the type of Department. In the case of Work Orders, you may have a Food Department that does not require the use of Work Orders because there is no equipment to maintain. In that case, you wouldn't need a Number Series.

The **Series Type** is the Series you are sharing, i.e. Form, Work Order, Address, etc.

Four of the last five columns correspond to the Rule columns ThisWeek, ThisMonth, ThisYear, and Total. The columns **Week**, **Month** and **Year** display how many numbers have been issued in the respective number series in these periods. Read about the Rules in section 14.7.

Use the **Year Reset** column to enter the number to reset a number series to at the start of a new year (resets the column Year). Normally, the value is set to 0, but there are situations where it is relevant to choose a different value. For example, different department may have different series for issued Forms. The main office may use numbers from 0, while one installation may use the Year Reset value 1000, and have the system assign numbers from that starting point at the beginning of the New Year. You must use the column Year in your Rule for this column to have any effect.

CHAPTER 16 Installations And Departments

The AMOS Business Suite contains functions to handle complex organisations. The Installations/Departments window lists all the Installations (Office, Vessels, etc.) within your organisation, and the Departments (Maintenance, Personnel, etc) which belong to each one. The Installation Groups window is for arranging your installations into groups for easier management.

As you work in AMOS Business Suite, you can move from one department to another by selecting **File > Switch Department** to change which department you will work in at present. Switching Departments is discussed in section 16.2.

Furthermore, AMOS Business Suite allows you to handle more than one Company within the same system; each one as a separate financial entity with one or more of its own installations. This multi-company management is defined in the Company window, and is discussed in section 16.3.

16.1 Creating Installations And Departments

Go to **Tools > Configuration > Installations > Installations/Departments** to open the Installations/Departments window:

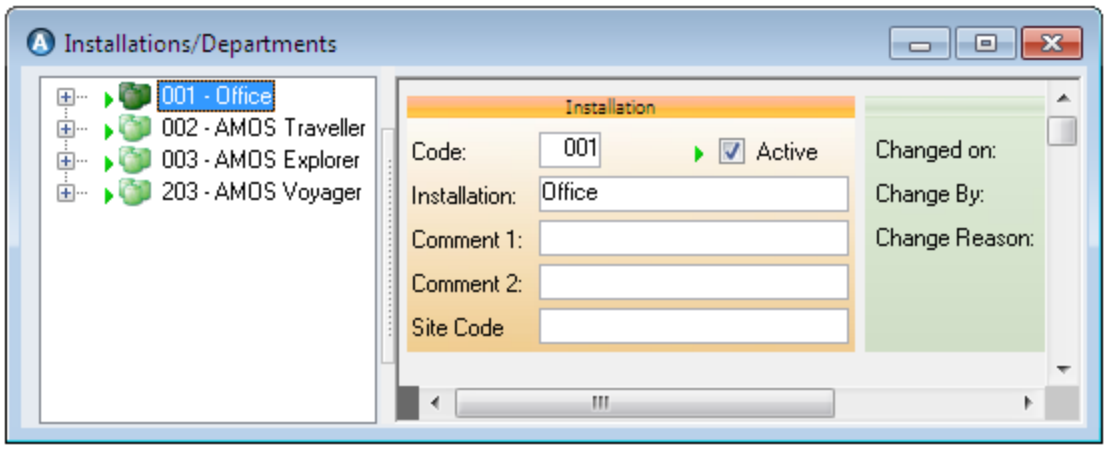


Figure 76 The Installations/Departments Window

The left side of the window displays a hierarchy, containing the Installations and Departments already registered.

To create a new installation:

1. Click the **New** button. In the New dialog, select Installation. Click **OK**.
2. A new Installation icon is added to the hierarchy. Fill in the Installation fields on the right side of the window:

- **Code/Installation** - enter the code and name for the installation.
- There are two separate **Comments** fields available for any textual information your organisation wants to connect to this installation.
- **Site Code** - a shortform code. For example, AVO for the installation AMOS Voyager.

3. **Save** the Installation.

To add a department to an installation:

1. Select the Installation in the hierarchy and click **New**.
2. In the New dialog, select **Department** and click **OK**.
3. A new Department icon is added beneath your new Installation. Fill in the Department fields on the right side of the window:

- **Code/Department** - enter a code and name for the department.
- There are two separate **Comments** fields available for any textual information your organisation wants to connect to this department.
- **Cost Centre** - select the default cost centre for this department from the drop-down list.

4. You can move a department easily by dragging it from one installation and dropping it into another installation. Departments cannot contain any sub-levels.
5. **Save** the Department.

To make an installation or department active and available, check the **Active** checkbox at both levels. Uncheck the Active checkbox to deactivate the selected installation or department. Deactivated installations/departments will not be a part of **Global Search** operations, and users will be prevented from switching to these areas.

If you try to make any changes to an existing Installation or Department, on Saving AMOS will present a Change Reason dialog. A reason for the change must be entered to appear in the Status Log, before saving will be allowed. The **Changed On** and **By** dates are updated here automatically.

16.1.1 Installation Groups

Installations can be grouped together to enable easier distribution to multiple sites.

For example, using AMOS Quality and Safety you can specify procedure documents to be distributed to installations and/or installation groups. Procedures that relate to specific installations are assigned directly for distribution. The concept of an installation group allows standard procedures to be grouped together according to class type, and thereby avoid having to allocate procedures individually to each installation.

Groups are created and the installations added to them in the Installation Groups window. Go to **Tools > Configuration > Installations > Installation Groups** to open the window. Existing Groups are listed on the left side of the window. Selecting one will display any installations belonging to it on the right side of the window.

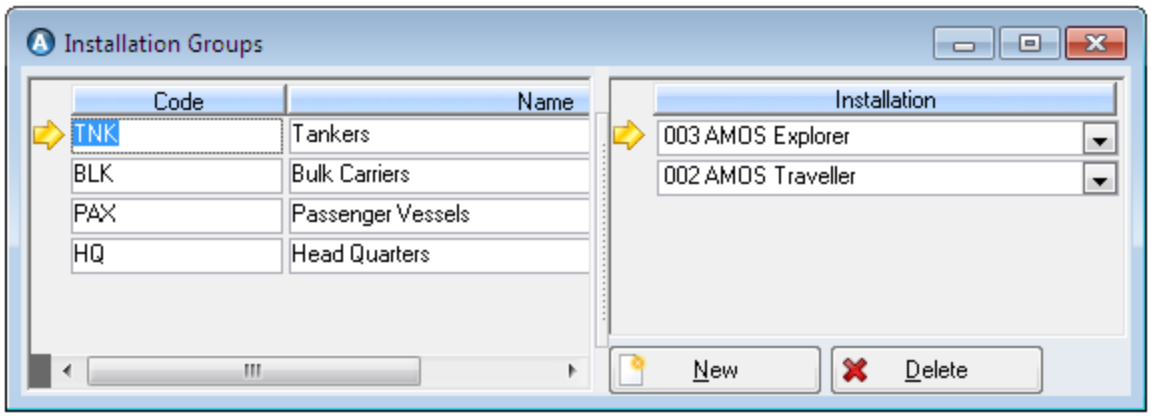


Figure 77 Installation Groups window

To create a new group:

1. Click the **New** button on the toolbar. A blank line appears on the left side.
2. Enter a **Code** and **Name**, i.e. HQ and Headquarters.
3. **Save** the Group.

To assign an installation to a group:

1. Ensure the correct group is selected on the left.
2. Click the **New** button in the bottom of the Installation part of the window. A blank drop-down line will appear under Installation.
3. The drop-down contains your available installations. Select one. Do this again til you have listed all the installations which should be in this group.
4. Make sure to **Save** before exiting the window.

16.2 Switching Departments

As you work in AMOS Business Suite, you can move from one department to another to change which department you will work in at present. Select **File > Switch Department** to access the list of defined installations and departments. Note that the Switch Department window only presents the actively available departments that the you (the logged in user) has access to. To change, simply select a department in the list, and click **OK**.

NOTE: Close any open windows prior to switching departments. It is not possible to switch from one department to another while windows are open.

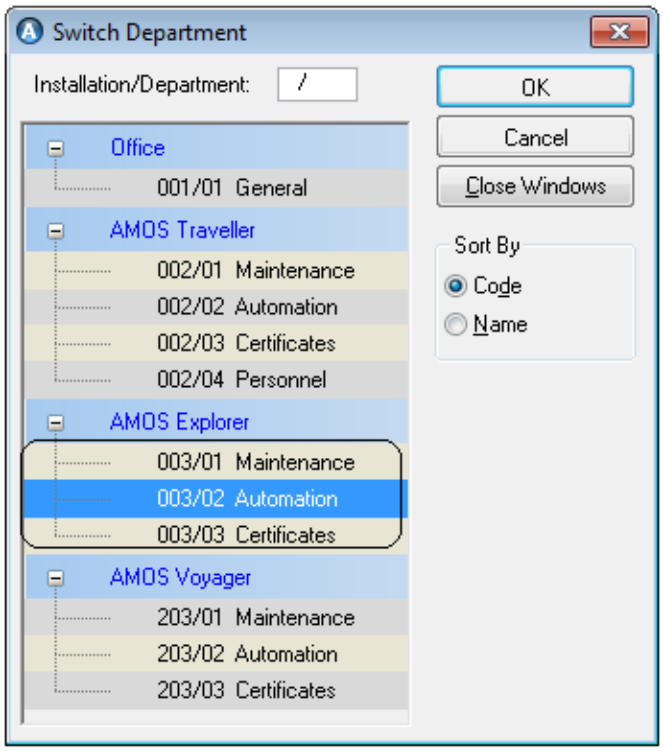


Figure 78 The Switch Department Window

The default sort order for Installations and Departments is by **Code**. If you change the **Sort By** setting to **Name**, the installations are automatically ordered alphabetically with the departments within their installation ordered alphabetically also.

16.3 Multi Company Management

AMOS Business Suite allows you to handle more than one Company within the same system; each one as a separate financial entity with one or more of its own installations. So, within one system you might have two or more companies, each with their own installations, and base currency, but all financial information strictly separated from each other.

To handle multiple companies, each one requires an entry in the Company register at **Tools > Configuration > Installations > Company**. The Installations as already created in the Installations/Departments window, can then be linked to the appropriate company. An installation cannot be linked to more than one company at a time.

To create a new company record:

1. Click inside the hierarchy panel. Click the **New** button on the toolbar and a new icon will appear in the hierarchy.
2. With the new icon selected, open the General tab.
3. Enter a **Code** to identify the Company by.
4. Enter the **Name** and **Address** information.
5. You can add the Company logo to your reports, if you enter a location for the **Logo**.
6. Use the Currency Access tab to check the currencies you want this company to be able to use.
7. Link Installations inside the Installations tab by clicking the **New** button at the bottom of the tab, and then looking up an installation. Only available ones, that are not linked to

another company already, will appear in the list.

8. **Save** the Company.

CHAPTER 17 Work Flow

Every task progresses to completion through a series of steps called a Work Flow. Configuring this work flow allows AMOS to perform each of these steps in accordance with your company's existing procedures.

The Work Flow process can be divided into the following categories:

Actions	A list of all possible Actions
Statuses	A list of all possible Statuses
Initial Statuses	A list of all possible Initial Statuses
Status Action	A list of actions that can be performed against a status
Resulting Status	The status that follows a performed Status Action
Default Mailbox	The default mailbox to use after performing the status action
AMOS Action	The equivalent action to be carried out by AMOS
Access to Action	Who has access to a particular action

Select **Tools > Configuration > Work Flow** to open the Work Flow Configuration window.

The Work Flow Configuration window contains three tabs:

- **Statuses**
- **Actions**
- **Initial Statuses**

In the case of Maintenance, Purchase, and Quality Work Order Work Flows, there are two more tabs present:

- **Lock Type**
- **Lock Access**

In addition to performing workflow operations while logged into the system, it is also possible for users to perform certain workflow actions from remote locations, for the AMOS Purchase module only. This is called Remote Work Flow. See section 17.4 for more on Remote Work Flow.

17.1 Configuring A Work Flow

At the top left of the Work Flow Configuration window is the **Select Module** field. Select the module to configure from the drop-down list. For the examples following, the Purchase module is selected.

Setting up a new Work Flow configuration involves the following procedures:

1. Create a list of Actions in the Actions tab. See section 17.1.1.
2. Create a list of possible Statuses in the Statuses tab. See section 17.1.2.1.
3. Build Work Flow Transformations by linking the statuses to actions. See section 17.1.2.2.
4. Assign AMOS Actions to the Transformations. Grant access to the actions. See section 17.1.2.3.
5. Define initial statuses for the different types of records (i.e. purchase order forms, queries, etc.) in the Initial Status tab. See section 17.1.3.
6. If applicable, create Lock Types and grant Lock Access. See section 17.1.4.
7. **Save** the Configuration, and Enable it for use. See section 17.1.7.

Other Options available in this window are discussed in section 17.1.5 and section 17.1.6. Some aspects of using the configured work flow are covered in section 17.3.

17.1.1 Configuring A Work Flow - Creating A List Of Actions

Ensure the correct module is shown in the top of Work Flow Configuration window, **Select Module** field. Open the Actions tab.

The Actions tab is for listing all possible actions that can be used in the Work Flow progression of a record, to change it from one status to the next. These actions are user defined and should be the same as your own company processes. In this example, you would define a list of all possible actions that could actually be carried out on a purchasing form in your organisation: Activating, Cancelling, Filing, Parking, etc.

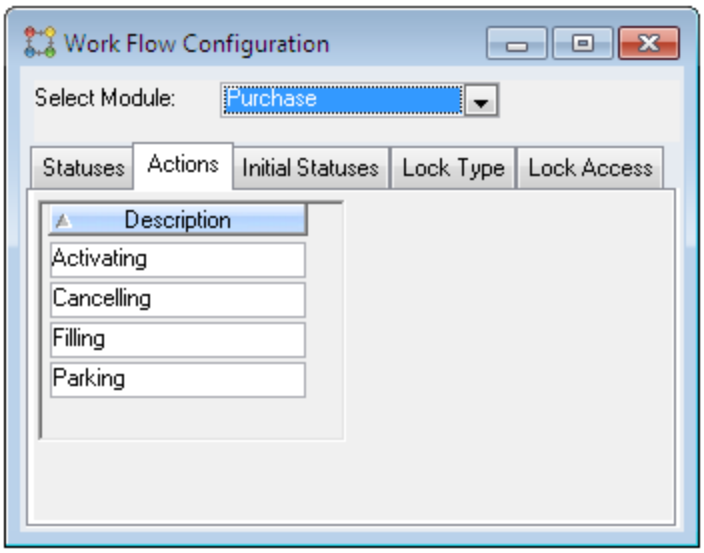


Figure 79 The Work Flow Configuration Window - Actions Tab

To add actions, click inside the tab and click the **New** button on the toolbar. Then enter the action in the blank line which appears. To delete an action select it and click the toolbar **Delete** button. Before leaving this tab, be sure to **Save** your list.

17.1.2 Statuses, Transformations And AMOS Actions

Once you have a list of all Actions that should be available for this module's Work Flow configuration, open the Statuses tab. This tab is for creating a list of possible Statuses, building Transformations, and assigning AMOS Actions.

When a Status Action (from the Actions tab) and a Resulting Status are linked together with a Status (listed on the left side), you have a Work Flow Transformation. A record's status is changed by performing Work Flow transformations on it. AMOS Actions must be assigned to each Transformation to allow it to work.

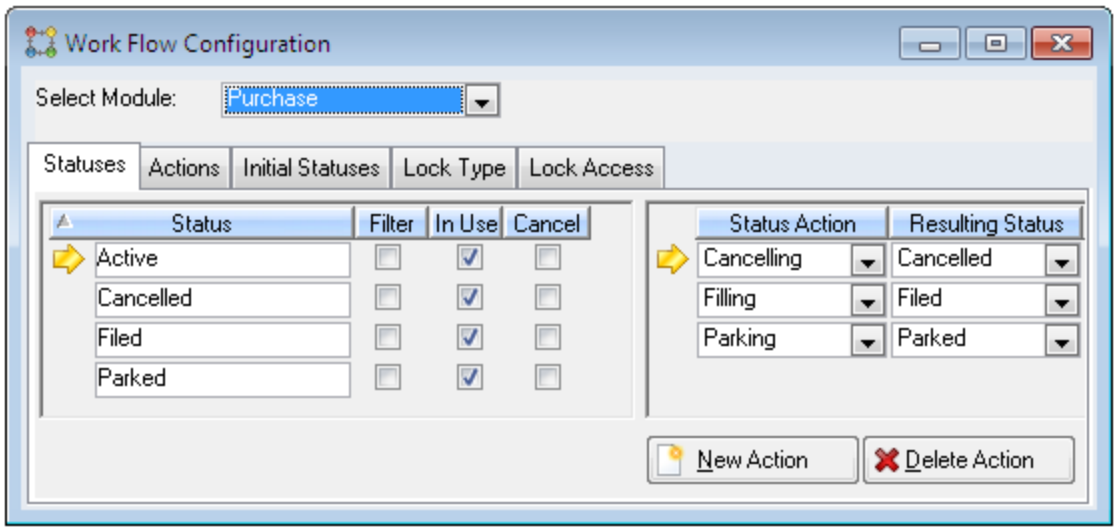


Figure 80 The Work Flow Configuration Window - Statuses Tab

Within this tab, you need to:

1. Create a list of Statuses.
2. Build the Work Flow Transformations.
3. Define AMOS Actions for each Transformation and assign Access to each Action.

17.1.2.1 Creating A List Of Statuses

The **Status** column on the far left section of the Statuses tab is for listing all possible statuses that a record progressing through this work flow configuration can have. Statuses are user defined and should be the same as your own company statuses. To add one, click the **New** button on the toolbar and type the Status into the blank line which appears.

Window filters (for example the Forms window filter shown below) show a list of statuses to filter for records by. If you check the **Filter** check-box in the Status tab beside a status, that status will be selected by default in the relevant window filter.

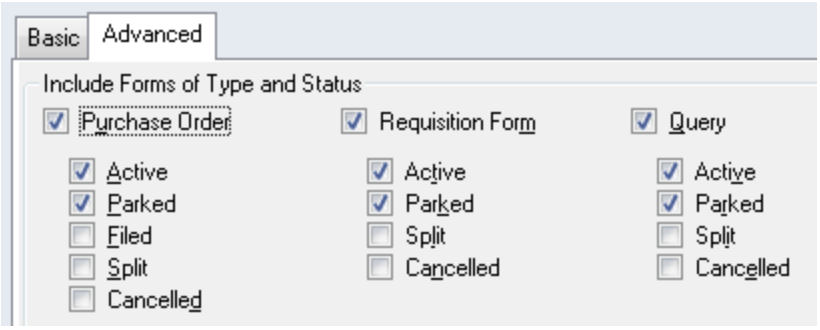


Figure 81 The Forms filter, Active selected by default

Checking the **In Use** checkbox makes the status available for use in the relevant module

Inform AMOS which status means Cancelled, by checking the **Cancel** checkbox beside that status. When a transformation results in that status, the internal status will be set to cancelled and the work flow status of the record set to the status identified here. Only one status per module can be marked to result as Cancel.

17.1.2.2 Building Work Flow Transformations

When you have finished defining your list of all possible statuses that should be available in this work flow configuration, build the Transformations that will enable users to convert records from one status to another:

1. Open the Statuses tab.
2. Select a status in the Status column, so that the yellow arrow appears next to it. This is the starting status. For example, *Active*.
3. Click the **New Action** button in the bottom middle of the tab. In the line that appears in the middle of the window, select a **Status Action** (taken from the Actions tab). This is an action that a user would perform on an Active record, for example, Cancelling.
4. Link the Status Action to the **Resulting Status** (taken from the Status column in the current tab). This is the final status the record ends up with after the action is performed. In this example, you would select Cancelled.

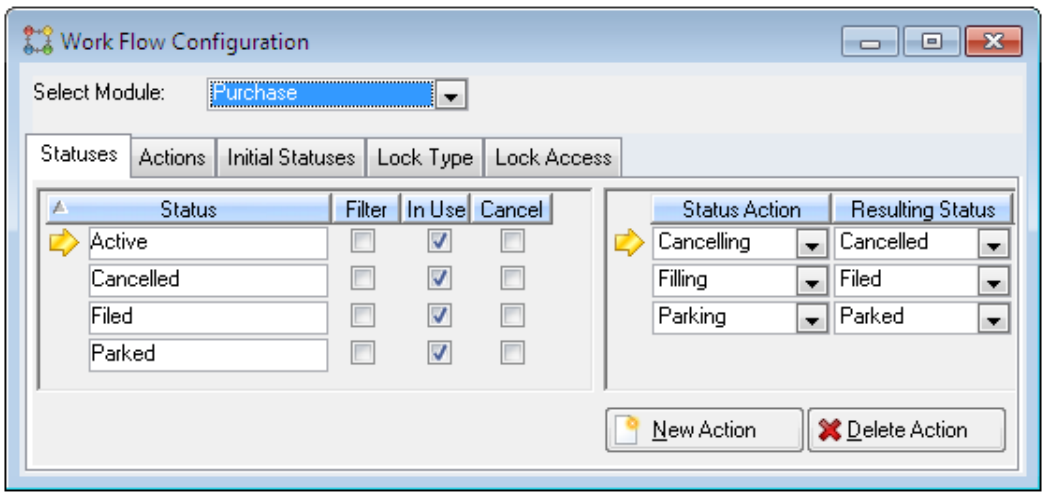
   This creates a status **Transformation**. Repeat this process to create as many transformations as needed for each status:

   Status > Status Action > Resulting Status

   Active > Cancelling > Cancelled

   Active > Parking > Parked

   Active > Filing > Filed



5. You can define a default destination mailbox for each transformation using the names in the **Default Mailbox** drop-down list. If you check the checkbox beside this field, the mailbox is restricted and does not require a value.

   When a user performs a work flow transformation in AMOS, they can select a mailbox in the **Change Work Flow Status dialog** to assign the record to. If a **Default Mailbox** has

been defined for that transformation then that user Mailbox will be listed already by default in the **Assign To** field on the Work Flow dialog. If the default mailbox has been restricted, the Assign To field will be read only.

6. The icon button beside the Default Mailbox field indicates whether or not an expression is present. **Expressions** determine which workflow action(s) is visible and listed in the 'Change Work Flow Status' dialogs. A True (visible) state means that the transformation will be listed and a False (invisible) state means that it will be hidden. Clicking the **Expression** button opens a dialog box. If there is no previously defined expression for the transformation, the dialog box is empty and you can create an expression. If there is an expression already defined, it will appear in the dialog box. Click **OK** to close the dialog. If the expression is invalid, you will not be able to close it.
7. When you have created all necessary transformations for the status Active, select the next status in your list and build transformations for that status in the same way.
8. **Save** your transformations.

17.1.2.3 Assigning AMOS Actions And Access On Transformations

Now, assign AMOS Actions to each Transformation. AMOS Actions achieve your user defined status Actions as contained in the Transformations listed in the middle column of this tab. Different AMOS Actions are available for the different modules. In addition to assigning AMOS Actions to user defined Actions, you need to grant the necessary user groups access to these actions.

To assign AMOS Actions:

1. Open the Statuses tab.
2. Select a Status, for example Active, and select a Transformation from your list. Ensure that the yellow arrows are next to the status and transformation you want to add AMOS Actions to.
3. Click the **New Action** button in the AMOS Action area, and a new drop-down list appears.
4. Add whichever AMOS Actions are necessary to achieve the Transformation:

   Status > Status Action > Resulting Status > AMOS Action

   Active > Parking > Parked > Park

   Active > Filing > Filed > File

   Multiple AMOS Actions can be assigned on one transformation.

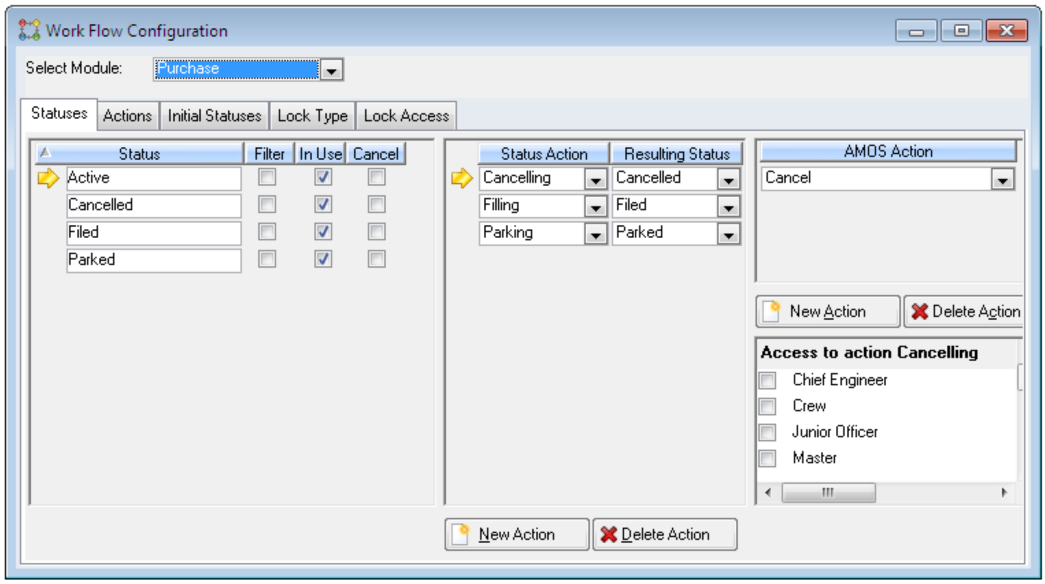


Figure 82 Assigning AMOS Actions

5. While a Transformation is selected, the user defined status action appears in the **Access to Action** list. Check the boxes of the user groups you wish to assign access to. Those who have access to each action will be able to view and edit the information at each stage of the process. See section 17.1.2.3.1 for more about Access to Actions.
6. Repeat this process to assign AMOS Actions to all the Transformations.
7. **Save** before exiting this tab.

NOTE: The AMOS Action 'File Full Received' supports filing of a fully received purchase form, and is only available to the Purchase module. When the user selects this action from the Change Work Flow Status dialog, if the selected form is fully received, the new work flow status will be set according to the status defined in the transformation. If the form is not fully received, it keeps its original status. If you use this action, make sure that the action 'Receive' is also part of the list and is listed as the **second** action, **after** 'File Full Receive'. If 'Receive' is not in the list you will not be able to **Save** your configurations and if it is listed first, your configurations will not work correctly.

17.1.2.3.1 Copying Access

Defining access for each group of users for each status action can be time consuming, especially if you have a large number of groups. The Copy Access From Action feature allows you to define access to groups more easily:

1. Select the Status Action in the middle column to which you want to copy the access settings. It will appear in the Access to Action list.
2. Go to **Options > Copy Access From Action** to open the Select Action dialog.

   The **Status** column contains a list of all defined statuses and may contain repetition if a status has more than one status action linked to it.
3. Select the line that you want to copy the access settings from and then click **OK**. You return to the main window.

17.1.3 Initial Statuses

Next, open the Initial Statuses tab to define an initial status for each type of record, for example:

- Each type of Purchasing Form - purchase order, requisition form, query
- Each type of Quality Work Order - periodic, requisition, corrective action

This is the status a new record will be created with in the relevant module. Select the statuses accordingly from the drop-down lists.

Before you can define initial statuses, create the available statuses in the Statuses tab if you have not already done so and then return to the Initial Statuses tab.

In the **Initial Lock** field (only available in Maintenance, Purchase, or Quality Work Orders) select from the drop-down list an initial lock type to apply at the initial status of the record. Lock Types have to be defined first in the Lock type tab. See section 17.1.4.

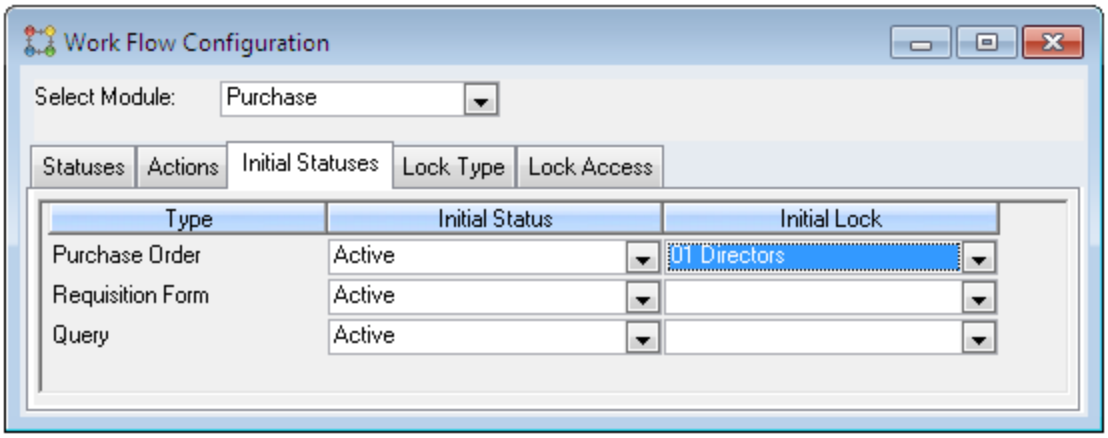


Figure 83 The Work Flow Configuration window - Initial Statuses tab

17.1.4 Work Flow Configuration - Lock And Unlock

If you are configuring Work Flow for the Maintenance, Purchase or Quality Work Order modules, there are two additional tabs available in the Work Flow window:

- **Lock Type** - a list of all possible Locks that restrict or grant access to particular work flow statuses to groups of users.
- **Lock Access** - a list of all the Groups that can be assigned to different locking types.

The AMOS Work Flow actions Lock and Unlock make it possible to define any number of locking levels in the Maintenance, Purchase and Quality Work Order work flows and grant specific group(s) the ability to edit work orders or purchase forms which are assigned a specific locking level. This enables work flow to control which groups can edit work orders or purchase forms of a particular work flow status. This can be useful, for example, if work orders pass through a planning stage where they can be edited only by members of a planning team and not by other users.

The locks are created in the Lock Type tab. To create a new lock, click the **New** button, and enter a code and description for the lock. These locks appear by their codes, in the Lock Access tab. There is a column of checkboxes under each lock code. Check or uncheck the boxes beside the user groups, to assign or restrict access as necessary. In the Status tab, select a particular status you wish to apply locking actions to. In the far right of the window, choose the AMOS Action Lock or Unlock, and the Lock Type that you wish to lock or unlock for the selected status. You can lock and unlock as many lock types for the selected status as necessary.

In the Initial Statuses tab you can assign **Initial Lock** types to apply at the initial status of a record, in other words when it is created.

17.1.5 Convert Work Flow Status

Select **Options > Convert Work Flow Status** to apply user-defined initial Work Flow statuses to each type of AMOS status (when converting to using Work Flow).

The window pertaining to the work flow module in the **Select Module** field appears. The first column contains a list of all possible AMOS statuses. The second column contains drop-down lists for selecting one of the earlier defined statuses against each of the AMOS statuses.

NOTE: When you are using Work Flow for either Maintenance or Purchase, the following changes occur in the application interface:

- The filters have the statuses you have defined to suit your organisation instead of the predefined AMOS statuses.
- User mailboxes become active.
- The menu entries for performing Work Flow related processes manually are deactivated.

17.1.6 Graphical View

To better visualise an existing work flow, choose **Options > Graphical View**. This opens the Work Flow Diagram window for the selected work flow. In the new window you can see the work flow mapped out as a diagram. In the right hand side of the window, is the list of all the user Groups in your system. The Groups are all checked by default when you open the diagram. You can check or uncheck any combination of groups to display their combined access rights. The access rights of the combined checked groups are shown by a black outline around the actions and statuses that apply. Grey outlines indicate that the combined group do not have access to that action or status. You can rearrange the Work Flow by dragging and dropping the arrows that connect actions and statuses.

The Work Flow Diagram window has an options menu of its own. Choosing the first option returns the diagram (and the work flow) to its original state if you have altered it.

The second two options allow you to **Save** and **Export** the diagram as an image file or a metafile.

17.1.7 Enabling A New Work Flow Configuration

After configuring a Work Flow process, select **Work Flow** from the Options menu for the applicable module (i.e. the Purchase Forms window) to enable the new configuration(s). If the Work Flow option is not available on that Options menu, check that the 'Use Work Flow' parameter for that module is set to TRUE (**Tools > Configuration > Parameters > Options > Maintenance/Purchase > Use Work Flow**).

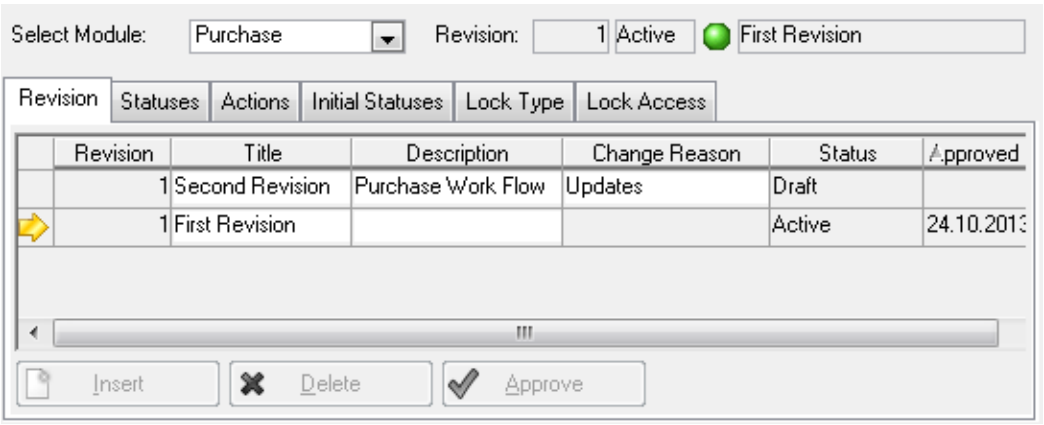
17.2 Work Flow Configuration Revisions

It is possible to create a series of revisions for any Work Flow configuration.

EXAMPLE

You find that an active and available Work Flow configuration contains some mistakes or needs changing in any way. You create a new draft revision that is a copy of the currently active revision. This way it is easy to make your changes to the draft, without having to start all over again. Then you save and approve the new revision, rendering the previous revision obsolete.

When revisions are in use, you can see the currently selected revision's number and status at the top of the Work Flow Configuration window, and the Revision tab on the far left of the window is enabled:



To operate, a Work Flow configuration must be active and approved. For any selected module in the system, it is possible to have just one active Work Flow configuration revision and one draft revision at any time. You can have any number of obsolete Work Flow revisions for the selected module:

1. Activate the work flow revision functionality. See section 17.2.1.
2. Create work flow revisions. See section 17.2.2.
3. Activate a new revision. See section 17.2.3.

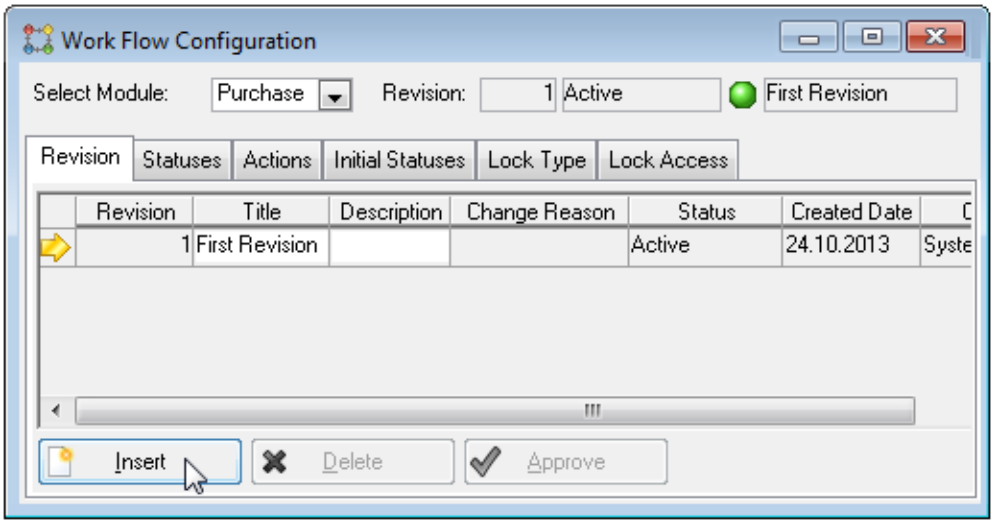
17.2.1 Activating Work Flow Revision Functionality

To activate Work Flow revision functionality it is necessary to set a system parameter: go to **Tools > Configuration > Parameters > Options > General > Work Flow >**. Set the parameter 'Use Revision' to TRUE to allow creating and using Work Flow revisions. Once set to TRUE and revisions have been created, this setting cannot be changed back to FALSE.

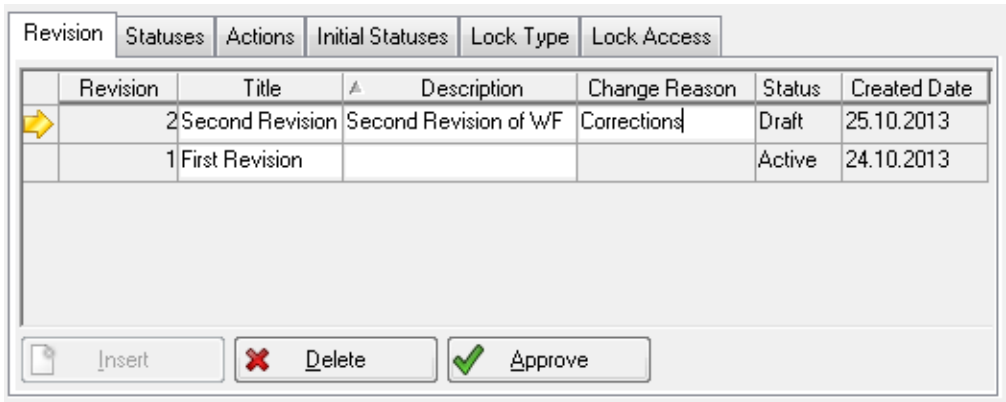
Additionally, a Work Flow revision must be approved in order to become active and available for use in the relevant module. Any user who is going to approve a Work Flow revision needs execute access to **Common >** 'Work Flow, Approve' on the Access Control window Functions tab.

17.2.2 Creating A WorkFlow Revision

1. Open the WorkFlow Configuration window and select a module from the drop-down list. Any existing revision(s) are listed in the Revision tab. The currently selected revision's number appears at the top of the window:



2. Click **Insert** in the Revision tab. This creates a new line with the status Draft. (Optional) You can change the **Title** and add a **Description** and **Change Reason**:



3. The content of the other tabs is copied from the last active revision; you can alter it as needed for the new revision.
4. **Save** the draft.

It is only possible to remove revisions from the list in the Revision tab if they have the status draft: the **Delete** button at the bottom of the tab will be enabled.

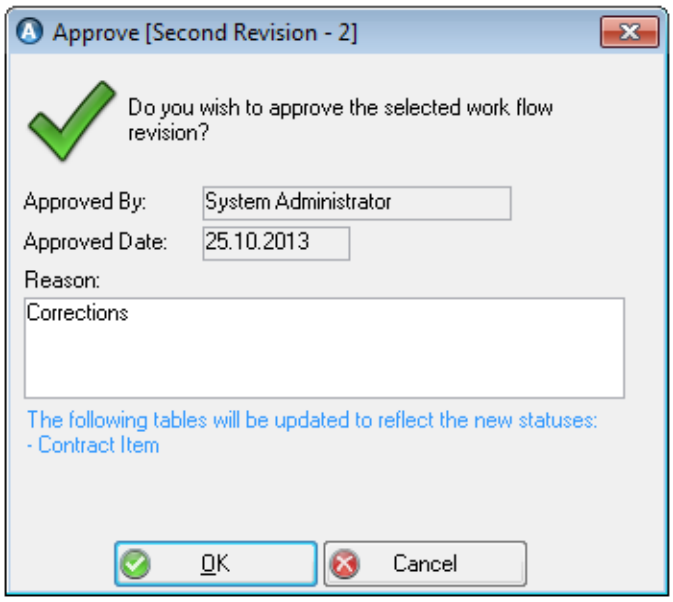
You can change the content of the tabs on a draft revision at any time by selecting the draft, making the changes and clicking **Save**. You cannot make changes to an obsolete or an active version.

17.2.3 Activating Revisions

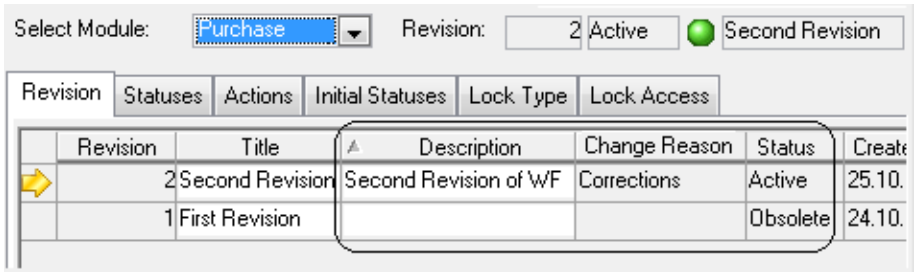
To make a new WorkFlow revision active and available to users, approve it:

1. Select a draft revision in the Revision tab.
2. Click the **Approve** button[1] in the bottom of the tab.
3. Click **OK** in the dialog to confirm the action:

[1]Approving a WorkFlow revision requires execute access to Common > 'WorkFlow, Approve' on the Access Control window Functions tab.



4. The revision is approved and its status changes to active. Any previously active revision will change automatically to obsolete:



When changing the WorkFlow status on any records(s) in the relevant window(s), it will only be possible to select transformations belonging to the same revision as the last transformation executed on the selected record(s), was from.

EXAMPLE

'Revision 1' of a Purchase WorkFlow configuration is active and available. A user creates a purchase order PO_1, and so the initial status on this purchase order is retrieved from the WorkFlow 'Revision 1'. The user changes the WorkFlow status on PO_1, selecting a transformation from the same 'Revision 1'.

In the meantime, a a new WorkFlow configuration, 'Revision 2' is approved and activated setting 'Revision 1' to obsolete. This means that all new purchase orders created from now on, retrieve their intial status and all available WorkFlow transformations as their status changes, from WorkFlow 'Revision 2'.

However - when a user changes the WorkFlow status again on PO_1, only transformations related to 'Revision 1' will be available for selection, even though this revision is obsolete.

17.3 Using The Work Flow

Some aspects of using a configured Work Flow follow.

When you have a Work Flow configuration set up and enabled for a module, you use it to change statuses on records listed in the applicable window, as those records progress through the Work Flow processes. For example, in the **Purchase > Forms** window:

1. Select a form and then go to **Options > Work Flow** to open the Change Status dialog. The available actions depend on the form's current status. If there are multiple actions listed, select the one you want to use and add a comment.
2. To assign the form to a new mailbox other than the pre-set default, select the mailbox from the **Assign To** drop-down list in the Change Status dialog. If the default mailbox has been restricted in the Work Flow Configuration Status tab, the Assign To field in the Change Work Flow Status window will be read only.
3. Click **OK** and the purchase form automatically progresses to the next stage in the Work Flow process.

17.3.1 Change Work Flow Status

When you have a Work Flow configuration set up and enabled for a module, you use it to change statuses on records listed in the applicable window, as those records progress through the Work Flow processes. For example, in the **Purchase > Forms** window:

1. Select a form and then go to **Options > Work Flow** to open the Change Status dialog. The available actions depend on the form's current status. If there are multiple actions listed, select the one you want to use and add a comment.
2. To assign the form to a new mailbox other than the pre-set default, select the mailbox from the **Assign To** drop-down list in the Change Status dialog. If the default mailbox has been restricted in the Work Flow Configuration Status tab, the Assign To field in the Change Work Flow Status window will be read only.
3. Click **OK** and the purchase form automatically progresses to the next stage in the Work Flow process.

17.3.2 Work Flow Notifications And Mailboxes

Work Flow Notifications, Delegate Mailbox Access, Mailbox Access Log and Transfer Mailbox Contents are functions which are part of the Work Flow module. These items are all available on the Tools menu.

17.3.2.1 Work Flow Notifications

Go to **Tools > Work Flow Notifications**, to open the window listing all notifications awaiting acknowledgement in your mailbox (the current user). To remove items from the list flag the checkboxes in the **Acknowledge** column and **Save**. Go to **Edit > Select All/Deselect All** to flag or unflag all entries at once.

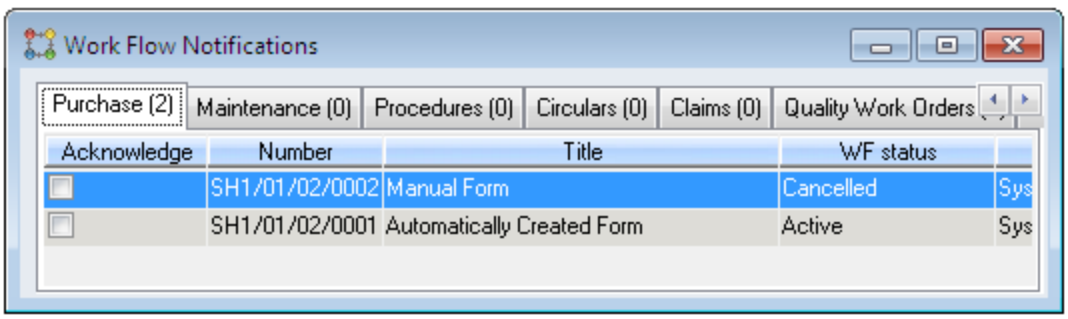


Figure 84 The Work Flow Notifications window

17.3.2.2 Delegate Mailbox Access

Users can delegate their mailbox access (if the 'delegate private mailbox access' control is enabled) to another user for periods of holiday etc. and then un-delegate their mailbox on return to work. Select **Tools > Delegate Mailbox Access** to open the dialog shown below. To return a Mailbox to its original owner select (None) from the **Delegate Access To** drop-down window.

If the access control 'delegate mailbox access' is enabled for the logged in user, they will be able to delegate any users mailbox to any other user.

17.3.2.3 Mailbox Access Log

If the access control 'delegate private mailbox access' is enabled for the user, they can view all access history for their personal mailbox by selecting **Tools > Mailbox Access Log**.

If the access control 'delegate mailbox access' is enabled for the user, they can view all mailbox access history for any user's mailbox.

17.3.2.4 Transfer Mailbox Contents

This allows users to transfer their mailbox contents to other users prior to periods away from the job. Select **Tools > Transfer Mailbox Contents** and assign a new user. Add necessary contents and uncheck modules if you do not want to transfer the entries.

NOTE: To avoid potential problems during mailbox transfer, all stages in the workflow process should contain a simple re-assign action without making changes to status.

17.4 Remote Work Flow

In addition to performing workflow operations while logged into the system, it is also possible for users to perform certain workflow actions from remote locations for the AMOS Purchase module only.

When a local user assigns a workflow object (i.e. a Purchasing form) in the Forms window to a user who has remote workflow activated, AMOS Business Suite sends email to that user with an HTML attachment.

The attachment looks like the standard Workflow window and contains:

- Detailed information regarding the workflow object.
- A list of actions the remote user can perform.
- A list of users the action can be assigned to.

When the remote user performs a workflow action, email is sent back to the system and the action is processed accordingly. AMOS then returns a mail to the remote user to inform him of the success or failure of the operation.

The following Purchase workflow actions are not available remotely:

- File Fully Received Purchase Order
- Print
- Receive Action

17.4.1 Remote Work Flow System Parameters

The parameters that control AMOS Remote Work Flow are system-wide. Once enabled, Remote Work Flow can then be switched on or off at user level.

To enable users to perform Work Flow operations by email the system needs to access an email account for sending and receiving those mails. These addresses are set in the system parameters at **Tools > Configuration > Parameters > Options > General > Remote Workflow**:

Mail Account User

This is a mail account user known to your mail server, which can receive the outgoing mails from the system.

Mail Account Password

The password for the user mail account.

Return Mail Address

The mail address for the system which will receive the workflow data from the remote user.

The remaining parameters in the Remote Work Flow folder must also be set accordingly:

HTML Type, JSON Library

Determines the kind of HTML file AMOS will produce. Read about these in section 17.4.2.

Mail Attachment Extension

The HTML attachment sent within the email will have the file extension defined by this parameter setting. If you do not provide an extension, AMOS uses the default 'HTML'. User-defined extensions are limited to 10 characters.

Purchase Template

A purchase template, containing the format your company uses. This will be presented to the remote user in the HTML attachment and will look similar to the normal Work Flow transformation dialog used in local Work Flow.

Send Mail

Must be set to TRUE. FALSE can only be used in the setup process (to avoid sending the mail), for debugging purposes.

Use Remote Work Flow

This system-wide parameter must be set to TRUE to allow use of remote workflow in your system. Set to true, users will have the option to turn remote workflow on in the Options window.

You also need to define a directory to temporarily store the HTML files that are queued for export before they are sent to the remote user. Go to **Tools > Configuration > Parameters > Directories**:

Remote Workflow Directory

Enter a valid folder to store the HTML files. For example, C:\Temp.

17.4.2 HTML Types And Web Browser Support

There are two types of HTML files which can be produced by AMOS. Which one to use is defined using the Remote Work Flow Parameters **HTML Type** and **JSON Library**. First, choose the **HTML Type.** There are two options, HTML/XML and HTML/JSON. If you select HTML/JSON, you will also need to set the JSON Library.

HTML/XML

Setting the **HTML Type** parameter to **HTML/XML** produces an HTML file containing an XML data island. This requires JavaScript to be enabled within the browser and is only supported by Microsoft Internet Explorer. This has always been supported by the AMOS Remote Workflow.

HTML/JSON

Setting the **HTML Type** parameter to **HTML/JSON** produces an HTML file containing a JSON data island. This requires JavaScript to be enabled within the browser and is supported by most major web browsers, including Microsoft Internet Explorer.

If you select HTML/JSON, you must define a JSON library. Several libraries are available on the Internet. For example, one such library may be found at:

http://ajax.googleapis.com/ajax/libs/jquery/1.3.2/jquery.min.js

Use the parameter **JSON Library** to make the selected library available for the HTML file, either by referencing a URL or by including the library directly into the HTML file itself. This parameter lets AMOS know how the selected library should be linked to the HTML file.

There are three values available when defining this setting:

- **INTERNAL** - uses the java script code found internally within AMOS, and inserts it into the HTML file. This increases the size of the HTML file.
- **URL** - links the URL you provide here, into the HTML file; this will not considerably increase the size of the HTML file.
- **FILE** - takes the java script code contained in the selected library file, and inserts it into the HTML file. This increases the size of the HTML file produced according to the size of the selected file. You indicate the location of the library file here. Keep in mind that AMOS does not verify the content of the file - it is inserted as it is.

17.4.3 Configuring The AMOS Remote Work Flow Setup

To make Remote Work Flow available in your system, first set the parameters as described section 17.4.1. Then, for each individual in your organisation who will use remote Work Flow, link an Address record to the Employee, and then link their AMOS User record to their Employee record:

1. Go to **File > Open Register > Address**.
2. Click the **New** button on the toolbar.
3. Create an address record for the employee. It is mandatory that you specify their email

address in the appropriate field.

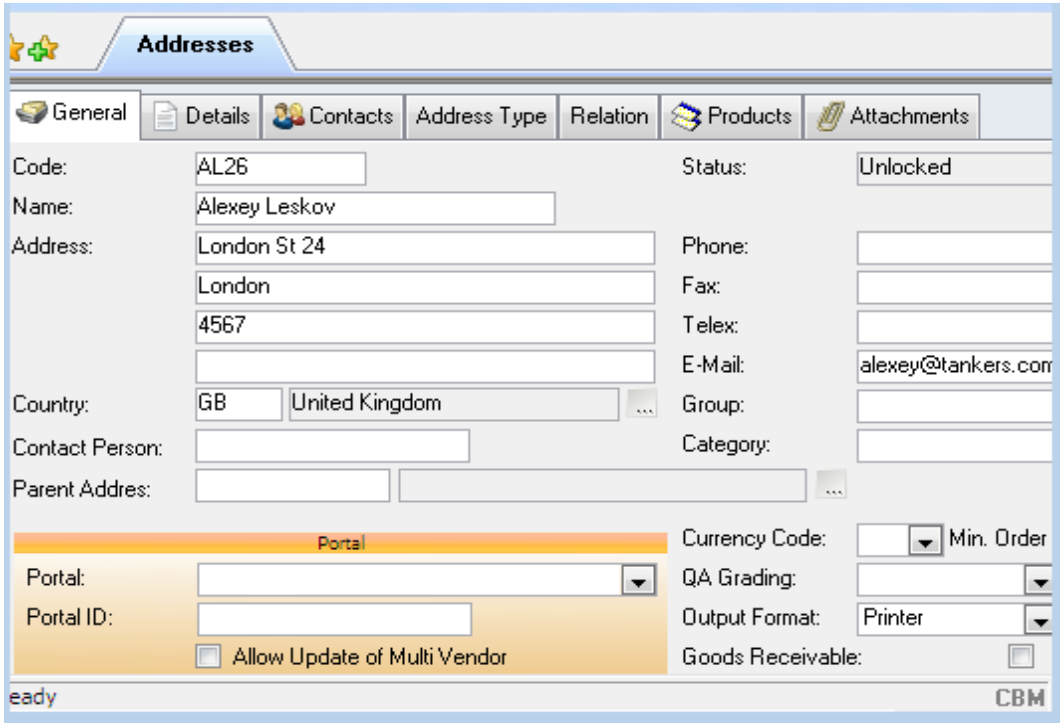


Figure 85 Creating an Address Record for the Employee

4. **Save** the record, and close the window.

   If your system license contains AMOS Personnel, carry on to step 5.

   If you do NOT have a license for Personnel, skip step 5 and go directly to 6.

5. Go to **Crewing > Employee**. In the Employee Overview window, click the **New** button and create a new record for the employee.

   Save the new record and close the window.

6. Go to **File > Open Register > Employees** to link the address record to the employee record.

7. In the bottom list part of the window, find the employee record and select it. The employee **ID**, **Last Name** and **First Name** appear automatically in the fields at the top of the window.

8. Click the **Address** lookup button and select the new address you created in step 3.

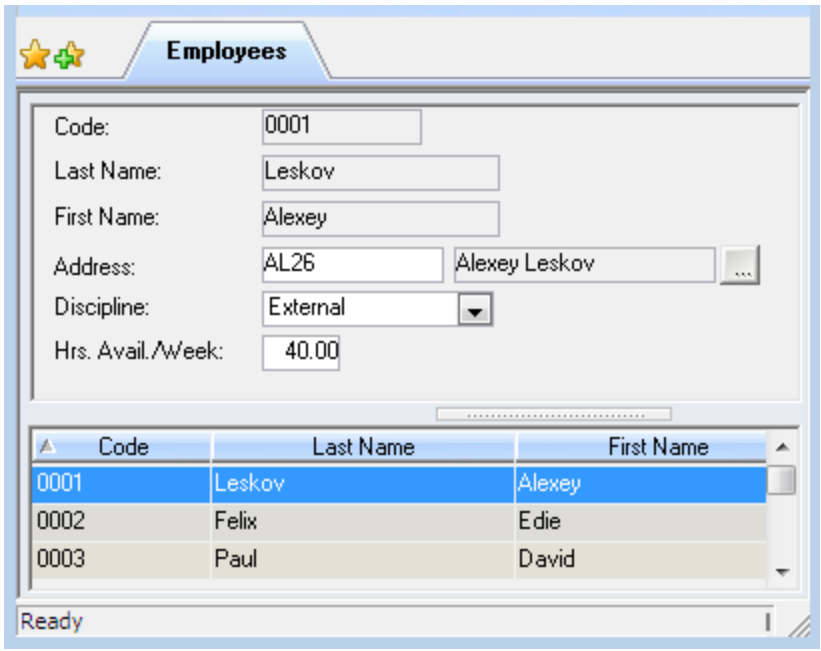


Figure 86 Linking the Address Record to the Employee Record

9. Enter a **Discipline** and the hours of **Availability**, and **Save** the record. Close the window.
10. Now link the Employee record created in step 5, to an AMOS User record:

    Go to **Tools > Configuration > Access Control > Users**. Click the **New** button in the toolbar.

11. Enter a **Login ID** and **Name**, and fill in the **Occupation** and **Comments** fields as needed.
12. Use the **Employee** drop-down list to select the employee created in step 5.

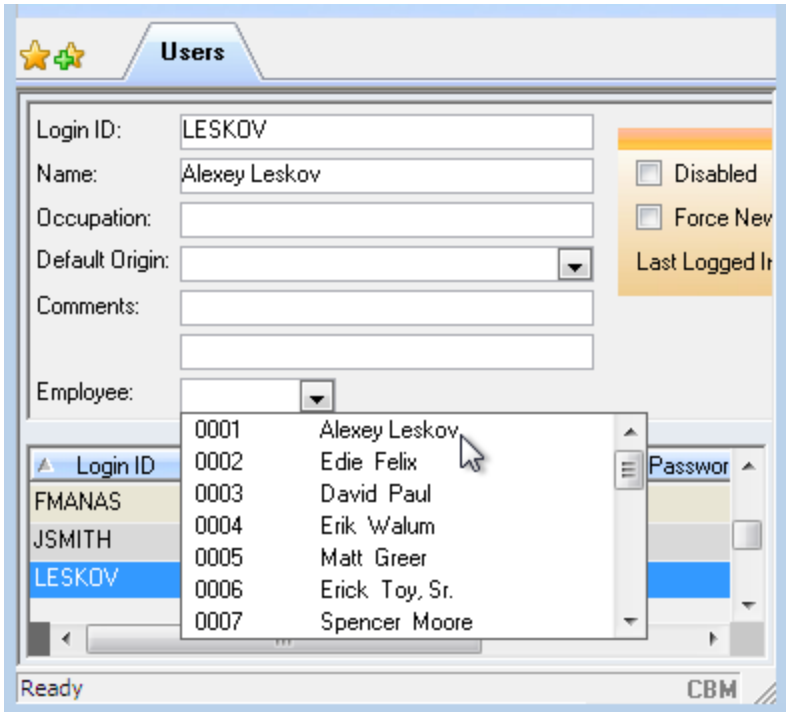


Figure 87 Linking the Employee Record to an AMOS User Record

13. **Save** the record and close the window.
14. Repeat this process for every individual in your organisation who will use remote workflow.

    When you are finished linking all the necessary Employee and User records, AMOS Remote Workflow will be configured for those users only.

Next, enable Remote Work Flow for these users. See section 17.4.4.

17.4.4 Enabling The Remote Work Flow Setup

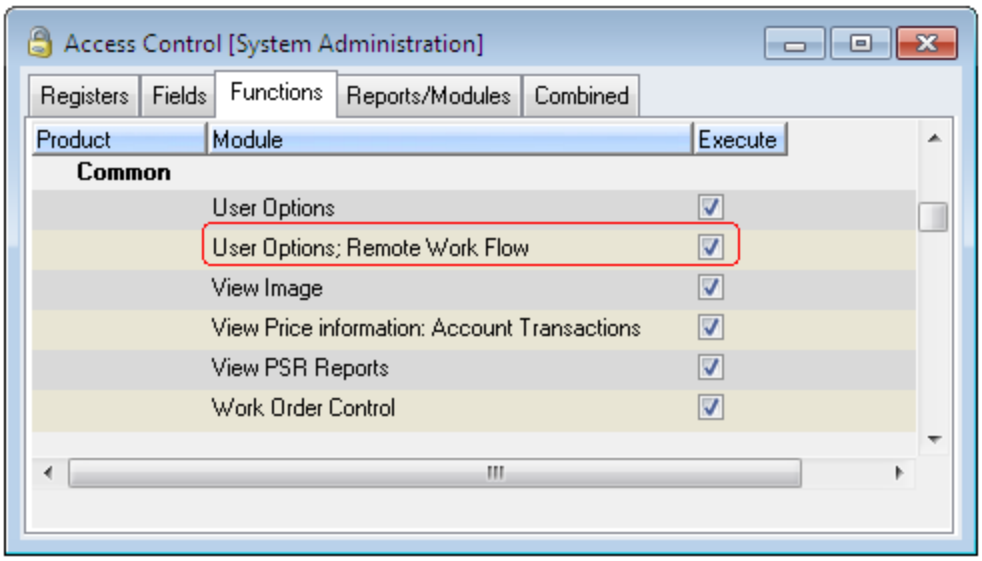
Once the remote work flow is configured enable it system-wide by activating the parameter 'Use Remote Work Flow'. Assign access control for the user groups who need it. Then, at user level each individual can turn the remote work flow on or off.

To enable remote workflow at a system-wide level (for the configured users):

1. Go to **Tools > Configuration > Parameters > Options > General > Remote Workflow**.
2. Ensure that the parameter 'Use Remote Workflow' is set to TRUE.

To enable remote workflow at a user level (for the configured users):

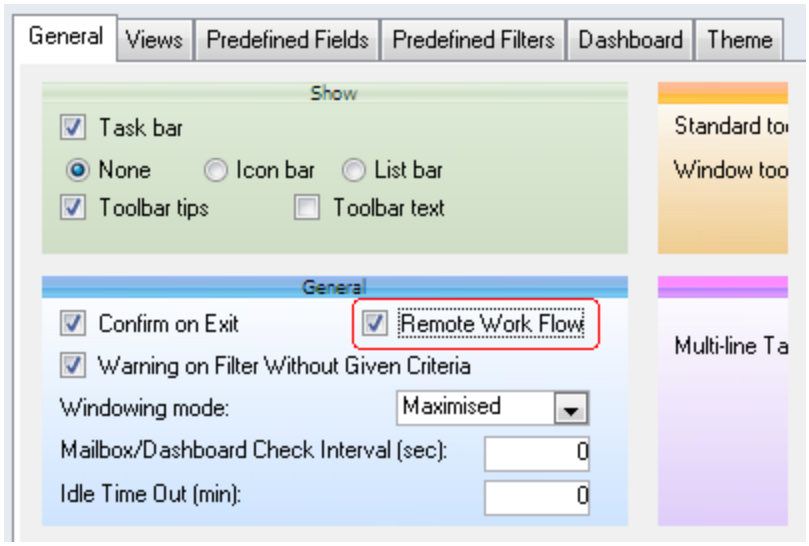
1. Go to **Tools > Configuration > Access Control > Groups**.
2. Select the user group you want to allow use of remote workflow. Then select **Options > Access Control.**
3. In the Functions tab, enable the entry 'User Option: Remote Workflow', and then click **Save**.



Repeat this process for each user group you want to allow to use remote Work Flow.

4. Now, at user level, each individual may turn remote workflow on in their own settings, when they wish to use it:

   Open the **Tools > Options** window. Check the **Remote Workflow** checkbox on the General tab to enable the functionality.



17.4.5 Using Remote Work Flow

When a user has remote Work Flow functionality enabled and switched on and he is not logged in to the system locally, AMOS will send him email allowing him to use Work Flow from a remote location:

1. A local user opens the Forms window, creates a new form, and **Saves** it.
2. The local user performs a Work Flow transformation on the form in the Workflow dialog, and assigns it to a user in the **Assigned To** drop-down list. The assigned user has remote Work Flow enabled and on.

> **NOTE:** If the assigned to user does not have remote Work Flow enabled nothing happens until he processes the transformation in the usual way.

3. The system queues the form for export, and then sends an email to the assigned user. It arrives with an HTML attachment.

> **NOTE:** Occasionally the remote user might receive a winmail.dat file. This is because of the mail client and/or server configuration. In this case, the remote user should forward the mail to himself and it will convert back to an HMTL document on being resent.

4. The remote user receives the mail and processes the HTML file in the same way he would work in the Work Flow Transformation dialog - assign to a user, selects an action to change the status, etc.
5. When finished with any changes to the HTML file, the remote user clicks **Send**. Closing the email without clicking Send causes it to be ignored.
6. The email is sent back to AMOS and processed by the system.
7. The system performs the updates to the workflow object, and saves it.
8. AMOS sends feedback to the remote user. The feedback email will contain one of three possible responses:

- **Ignored** - the remote user modifications have been ignored because the workflow action selected contained instructions that can only be performed when logged into the system.

- **Ignored** - the remote user modifications have been ignored because the status of the object was changed before the system received the remote user response. This can occur if, for example, the remote user has delegated his mailbox access to another user in his absence.
- **Accepted** - the remote user modifications have been made and saved.

CHAPTER 18 Mandatory Fields

You can define fields as mandatory. This prevents the user from saving information in a window with mandatory fields, until all required fields are filled. Separate error messages for each mandatory field should be added to assist the user to enter the required data. Using mandatory fields means you can specify information that must be included, for example on Order Forms, Work Orders, Component records and other areas. Go to **Tools > Configuration > Mandatory Fields** to open the window for defining which fields should be mandatory, and creating the error messages to go with them.

The window is divided into two areas, with **Tables** listed on the left side and **Columns** and **Error Messages** listed on the right side. Select any Table already listed to see the Columns on the right side which have been defined as mandatory fields for that table, and their associated error messages.

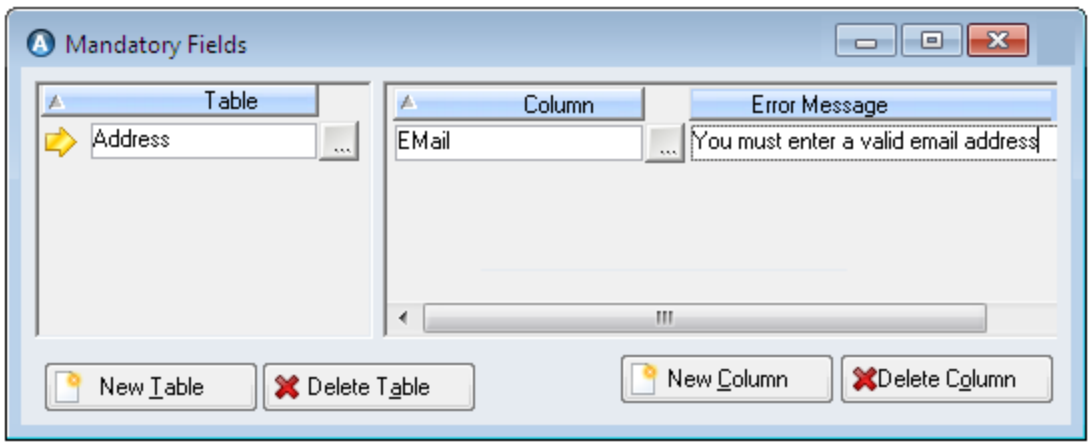


Figure 88 The Mandatory Fields window

18.1 Defining A New Mandatory Field

To define a new mandatory field:

1. Click the **New Table** button at the bottom left of the window.
2. Use the lookup on the blank line that appears to select the Table containing the field(s) you want to make mandatory.
3. If there are already tables listed on the left, make sure the correct one is selected before clicking the **New Column** button.
4. Click the lookup button beside the new blank line. A dialog listing all columns for that table will appear.
5. Select the column you want to make mandatory. Note that this dialog supports multi-select and so you can select more than one column at once, by holding the **CTRL** key and clicking on the columns.
6. When you have made your selection, click **OK** to list the column(s) on the right side of the window.
7. Manually enter a helpful error message for each mandatory field so that users will not be in doubt as to the required action. For example:



Figure 89 A Typical Mandatory Field Error Message

8. **Save** your work.

Remember

- You can add several columns to a single table (one by one or all at once using multi-select), each denoting a different field with a dedicated error message.
- The error message can be up to 60 characters long.
- Existing records, if modified, also need to comply with the mandatory field requirements.
- There is no verification of the actual content in a mandatory field. Error messages only appear if the field is empty.
- Deleting a Table also deletes all corresponding columns and error messages.

NOTE: The lookup filters display either a complete list of database tables, or all of the columns within the selected table. This means that it is possible to make any field mandatory regardless of the practicalities of doing so. When defining mandatory fields, be sure to avoid illogical or impossible requests.

NOTE: There is a parameter that controls the automatic creation of Forms with mandatory fields. See section 14.11.7, Interrupt Automatic Form Creation Due to Mandatory Fields parameter, for more information.

CHAPTER 19 The Dashboard: Alerts Overview

When AMOS Business Suite is started up the application opens to the customisable homepage, or Dashboard. Users can add convenient information to their dashboard, such as Alerts. What each user sees in their Dashboard will vary according to their own settings, and alterations to their data. Switch your Dashboard on and off by checking or clearing the **Enable Dashboard** checkbox in the Dashboard tab in the Options window at **Tools > Options**.

Each user can customise the list of Alerts that appear on his own Dashboard:

1. Define alert groups. See section 19.1.
2. Define the alerts that will be available in the system. See section 19.2.

   For any defined alert, you can specify a threshold - the highest acceptable value the alert can reach, for example the maximum number of overdue work orders that will be allowed. See section 19.2.3.
3. Each user can enable the alerts present in his or her Alerts Overview[1] by choosing from the list in the Options window. See section 19.3.

You can adjust your view of the dashboard alerts by using a separate thread for retrieval, according to the setting of the system parameter 'Use Separate Retrieval Thread'. If set to TRUE, the user can continue to work without being interrupted by dashboard operations. In this case indicators on the dashboard will inform the user which alert is currently being processed and although the values will be updated immediately for each alert, the alerts bar and pie charts will be updated when all alerts have been processed.

19.1 Defining Alert Groups

1. Go to **Tools > Configuration > Dashboard Alerts**.
2. The window that opens has two panes. In the left hand side, you will create a hierarchy of alerts.
3. Click the **New** button on the toolbar. In the dialog that appears, click **Yes**. A new Group appears in the hierarchy and fields appear on the right hand side.

[1] It is possible to set an alert group to always appear on the dashboard whether the user selects those alerts for his Alerts Overview or not. See section 19.1.

4. Select the new Alert Group. You can change its name in the **Name** field if you want. Add a **Description** for it accordingly. The text you enter in this field will appear in a tooltip when the cursor hovers over the Group name in the Alerts Overview on the Dashboard.

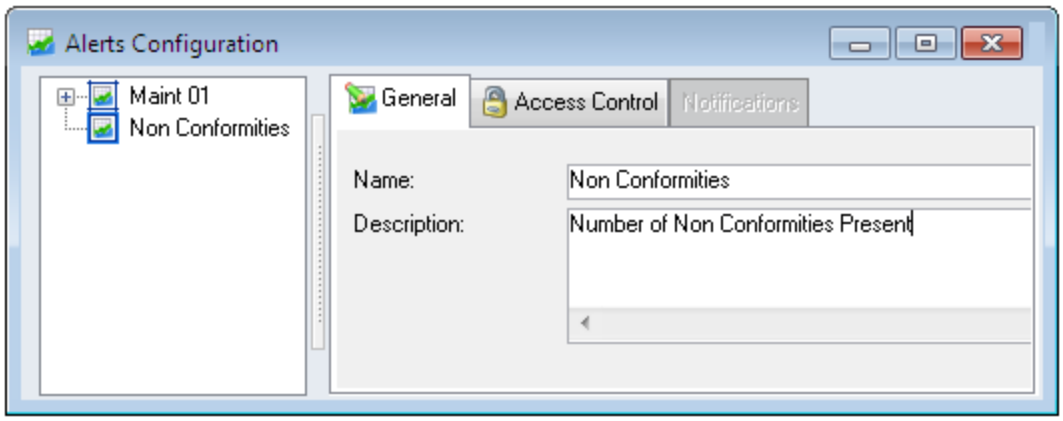
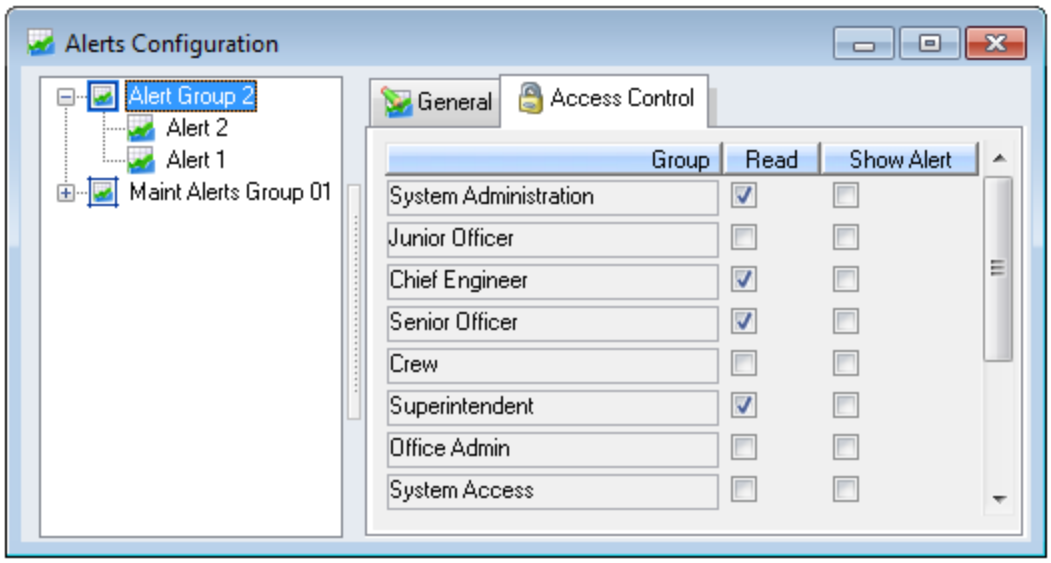


Figure 90 Defining an Alert Group

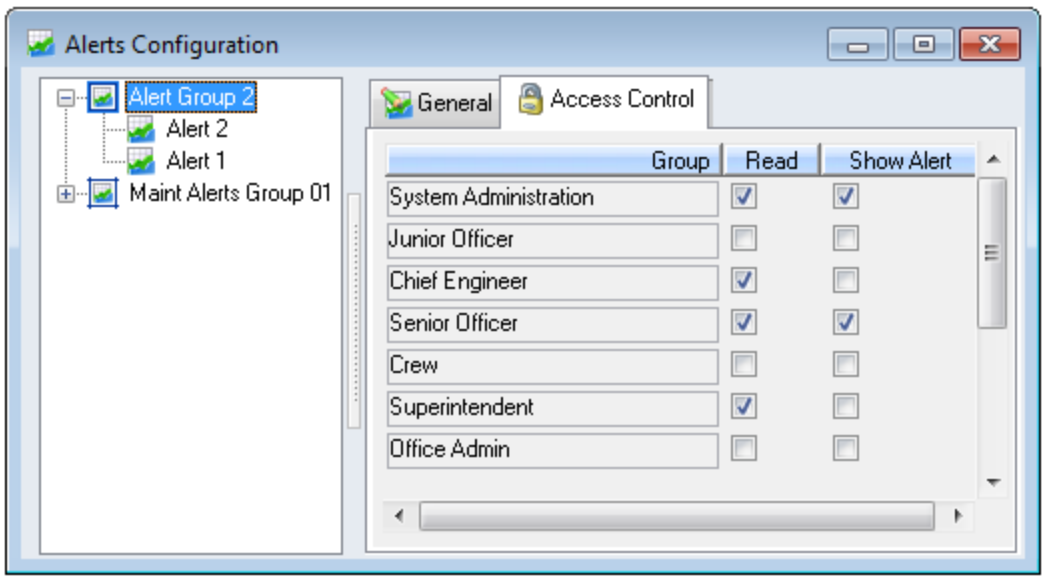
5. Open the Access Control tab. Check the boxes according to who should have **Read** access to the alerts in the selected group. Users in User Groups with Read checked will now be able to choose these Alerts in the Options window, to display on their Dashboards:



Users in groups without Read checked will not see these alerts listed in the Options window.

6. You may want to make an alert group appear automatically on the dashboard for certain user groups. To do so, check the **Show Alert** box next to Read for those user groups. These alerts will now appear on the dashboard for all users in the relevant group(s),

whether the user chooses the alert for display or not:



If you uncheck Read, Show Alert will be unchecked automatically too.

7. **Save** the Alert Group.

19.2 Defining A New Alert

1. Select a group, and click the **New** button on the toolbar. In the dialog that appears, click **No**.
2. Underneath the new Group, another icon will appear, titled **Alert**.
3. Enter a **Name** for the Alert.
4. In the **Description** field, enter the text you want to show in the Tooltip when the user positions the cursor over the Alert on the Dashboard.
5. Click the button beside the **Graph Bar Color** field and then use the RGB colour model to define the colours which the alert bars should appear in on the Dashboard.

NOTE: To define if the length of the bar should be affected by the alerts with the highest value amongst all alerts, or amongst the same group, set the parameter 'Alerts Maximum Size'. See section 14.11.3.2.

6. Use the **Designated Window** drop-down list to select the window to be opened automatically when a user double-clicks on this alert on the Dashboard. This field is only available if the checkbox **Row count defines the alert value** is checked.

   If you uncheck this box the alert displays in the same way, but its value is based on a calculation and so there is no window to open by clicking the alert on the Dashboard.

7. In the **SQL Syntax** section, define an expression. This can be done manually or automatically.

   See section 19.2.2 and section 19.2.1 for instructions and examples.

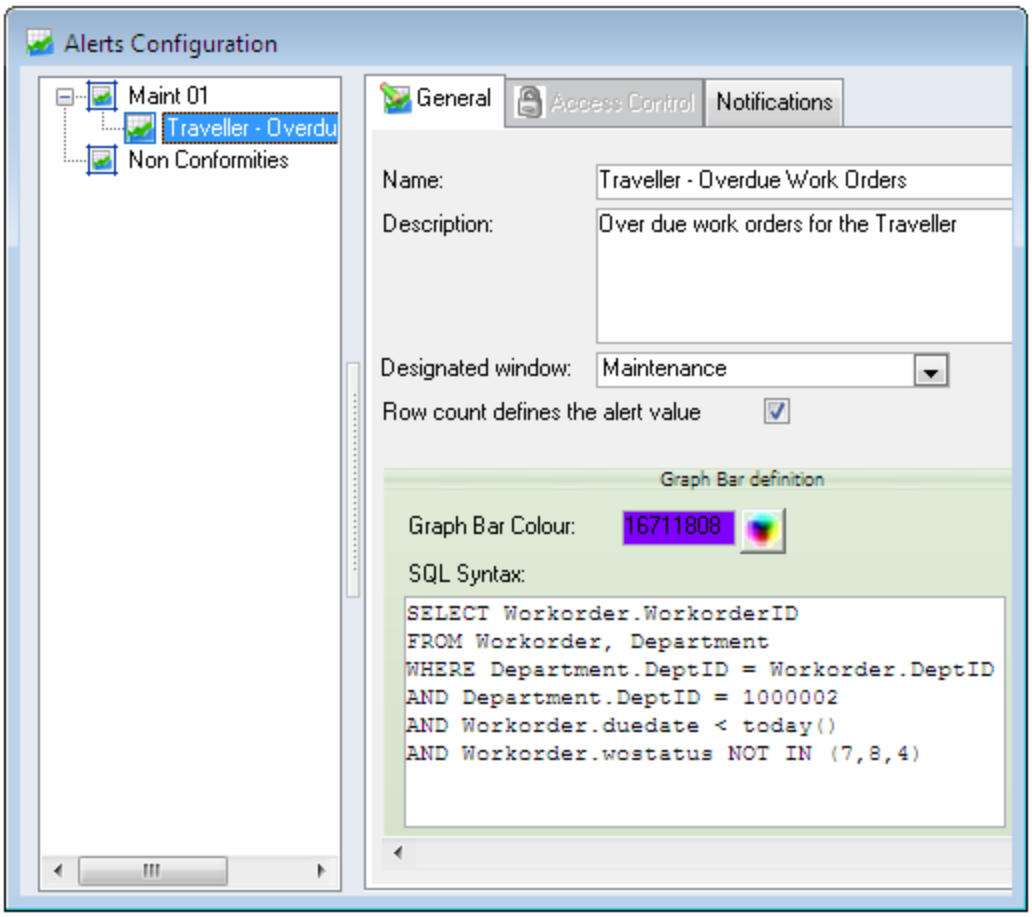


Figure 91 Defining a new alert

8. **Save** the new alert.

19.2.1 Defining An Expression Manually

NOTE: The system will modify the SQL expression you define, to retrieve the number of rows and not the complete data you specify. This reduces the returned rows for speed and network traffic improvement. However, a user can get an indication of what SQL is really performed, by pressing the SHIFT key and moving the cursor over the alert in the Dashboard -a tooltip with the modified SQL will appear.

Use the following syntax: SELECT COUNT(expression)FROM tables WHERE predicates;

For example: 'Display the number of overdue Maintenance Work Orders which are Issued:'

```
SELECT COUNT (workorder.workorderid) FROM WorkOrder WHERE
( DueDate < getdate() ) AND ( WOStatus in (6) )
```

You can add comments into the SQL statement by placing // in front of your comment.

The following Alert example will display overdue work orders for a particular department. Double-click the alert while in the correct department, and the work order window will open displaying the relevant work orders:

```
SELECT Workorder.WorkorderID
FROM Workorder, Department
WHERE Department.DeptID = Workorder.DeptID
AND Department.DeptID = 2000003
AND Workorder.duedate < today()
AND Workorder.wostatus NOT IN (7,8,4)
// 7 = Completed
```

```
// 8 = Controlled
// 4 = Cancelled
```

With the 'Designator Window' = 'Maintenance'

2000003 = Current department

The following Alert example will display the overdue work orders for all departments:

```
SELECT Installation.InstCode || '/' || Department.DeptCode, Workorder.WONo, Workorder.Title,
Workorder.Priority
FROM Workorder, Installation, Department
WHERE Department.DeptID = Workorder.DeptID
AND Department.InstID = Installation.InstID
AND Workorder.duedate < today()
AND Workorder.wostatus NOT IN (7,8,4)
ORDER BY Department.DeptID ASC
```

With the 'Designator window' = (None)

> **NOTE:** You must use an apostrophe (not a single quote) within || '/' ||.

The following Alert example displays the order forms:

```
SELECT Installation.InstCode || '/' || Department.DeptCode, OrderForm.FormNo,
OrderForm.FormType, OrderForm.FormStatus, OrderForm.Title
FROM OrderForm, Installation, Department
WHERE Department.DeptID = OrderForm.DeptID
AND Department.InstID = Installation.InstID
order by Department.DeptID asc
```

With the 'Designator Window' = (None)

> **NOTE:** You must use an apostrophe (not a single quote) within || '/' ||.

19.2.2 Defining An Expression Automatically

If you are not familiar with AMOS table structures and SQL commands, you can use filters and drag and drop, to provide the information AMOS needs to make the SQL statement for you. For example, to create an alert that informs the user how many overdue work orders are present in the system, with the Alerts Configuration window still open, open the **Maintenance > Work Orders** filter. Set the filter criteria to return only overdue work orders and click OK. When the window opens, it will display a list of only those work orders that are overdue. Click anywhere inside this list, and drag the mouse into the **SQL Syntax** box on the Alerts Configuration window. AMOS will take this information and then convert it to an SQL statement for this alert, defining that the user alert will track overdue work orders. The resulting SQL statement is dynamic, meaning that it varies with your data. In other words, if there were only 20 overdue work orders in the system at the time you defined the alert, but later on, the number increases to 30 - the alert will reflect this change. Note that dragging and dropping from the Stock Wanted window, is not supported.

19.2.3 Alert Threshold Definition And Notifications

For any defined alert, you can specify a threshold - the highest acceptable value the alert can reach, for example the maximum number of overdue work orders that will be allowed. If this threshold is reached, the Alert's label on the dashboard will change to red and the alert bar will change colour to the one set in the **Threshold Colour** field.

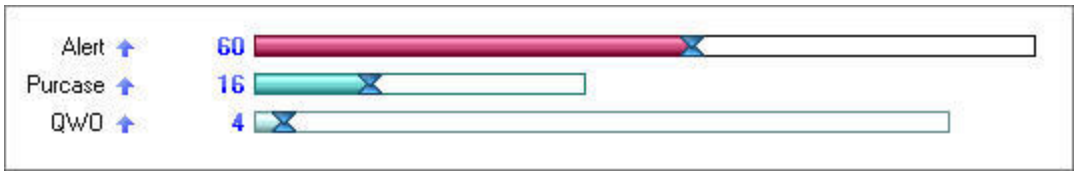


Figure 92 Alerts displayed on the Dashboard with Thresholds

AMOS can also send an email to the responsible user address(es) as defined on the alert, along with the predefined subject and text. To set a threshold on an Alert:

1. Ensure the correct alert is selected on the left side of the window.
2. Click the button beside the **Threshold Colour** field and then use the RGB colour model to define the colours the alert bar will change to on the Dashboard display, when the threshold is crossed.
3. Define an expression in the **Threshold SQL Syntax** area in either of the two ways as described above. Again, you can use drag and drop to easily provide the information AMOS needs to make the SQL statement for you.
4. **Save** the Threshold.

   To enable AMOS to send automatic email notifications when this threshold is crossed:

5. Again, ensure the correct alert is selected on the left hand side. You cannot define an email notification on an Alert Group. Open the Notifications tab.

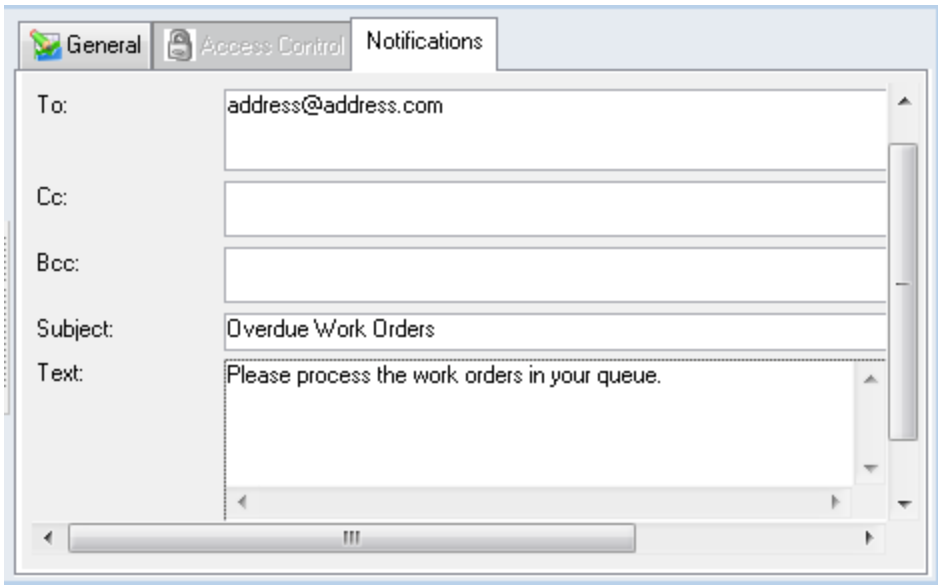


Figure 93 Creating a standard email notification

6. If an email notification is already configured for the selected alert, it will appear here. Only one email configuration can be defined per alert. Otherwise, the fields are blank and you can create your new email configuration.
7. Using **To**, **Cc** and **Bcc** you can insert a string of addresses separated by semi-colons. AMOS will not verify these addresses.
8. Enter a pre-defined **Subject** and **Text**. For example, Subject: Overdue Work Orders. Text: 'Please process the work orders in your queue. The number of overdue work orders is above the acceptable limit'.
9. **Save** the pre-defined mail. To enable the mail to be sent, see section 19.3.3.

19.3 Customising The Alerts On Your Dashboard

Each user can choose which defined alerts they want present on their dashboard.

19.3.1 Enabling Alerts On Your Dashboard

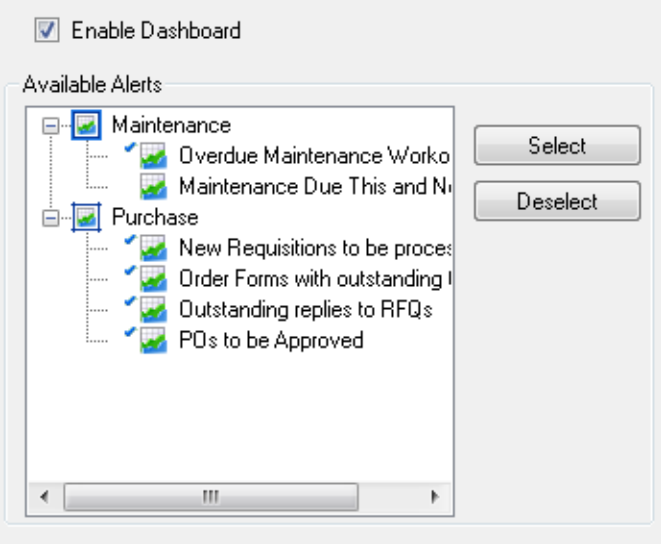
The Options window Dashboard tab contains a list of the defined alerts[1] that are currently available in the system. Some alert groups may be set to appear on your dashboard automatically. These are mandatory and will appear regardless of whether you select or deselect them in the Options window. See section 19.1.

To display a defined alert on your dashboard:

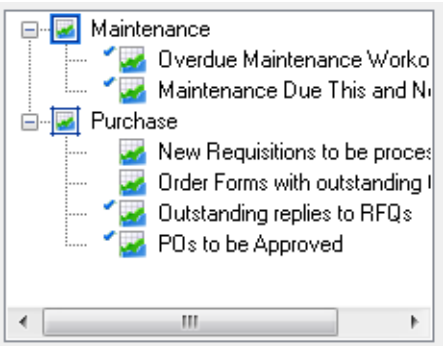
1. Go to **Tools > Options.** Open the Dashboard tab.

   If the dashboard is not already enabled, flag the **Enable Dashboard** checkbox.

2. Expand the **Available Alerts** list:



3. To select an entire group of alerts, click on the root and click the **Select** button. Otherwise, click on a single alert and click **Select**:



   A small blue check appears next to any selected alert; to remove an alert click on it and click the **Deselect** button.

4. Click **OK** in the Options window. The next time you start AMOS, the alerts will appear you selected will appear on your dashboard.

19.3.2 Alert Gauge

It is also possible to display a gauge alongside the alert bars, with numbers on a dial visualising the alert values. This gauge is switched on or off in the Options window Dashboard tab:

[1] Alerts will only appear in the list if your user group has Read access assigned to them.

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Enable the alert gauge by checking the **Show Alert Gauge** checkbox.
4. Click **OK** to close the dialog.
5. A gauge with a blue and a red indicator will appear on your dashboard.

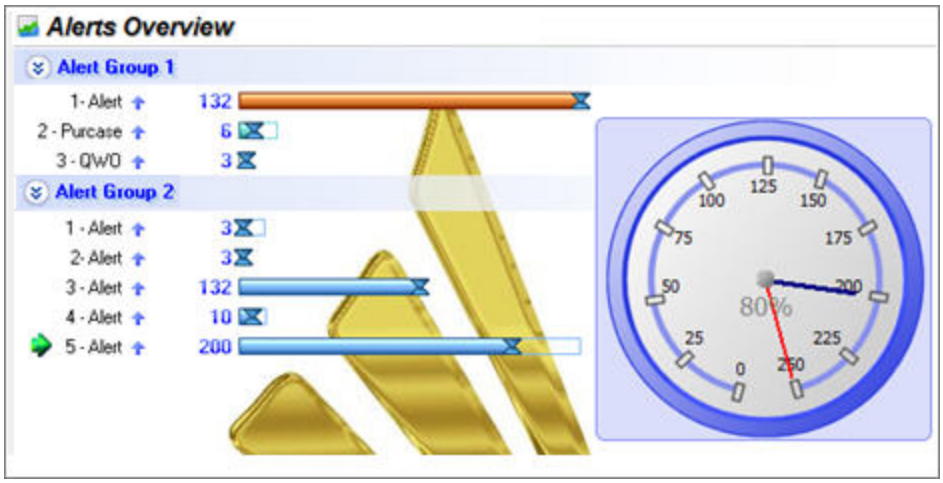


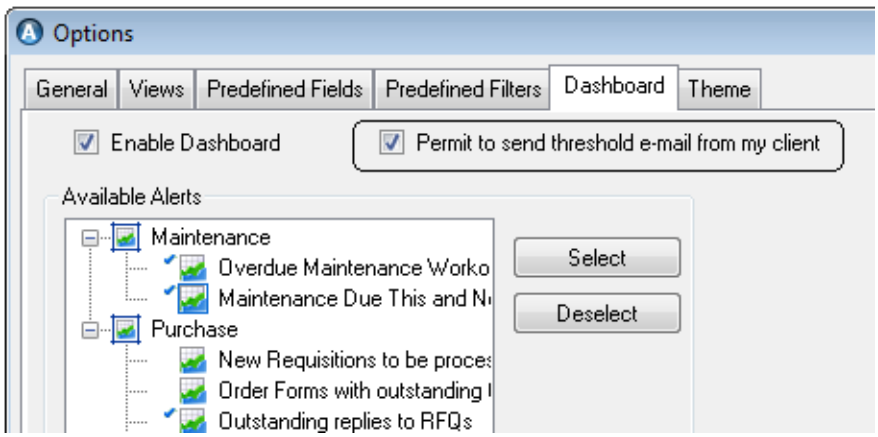
Figure 94 A sample of Alerts, thresholds and a gauge

The blue indicator represents the value of the currently selected alert. The red indicator represents the threshold value of the currently selected alert.

19.3.3 Sending Threshold Notifications

Dashboard alert definitions may include a threshold, and an email notification to be sent if the threshold is crossed:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Flag the **Permit to send threshold email from my client** checkbox:



4. Click **OK**.

If a threshold is crossed emails will be sent to the users selected on the alert's threshold definition. Before sending an email AMOS will check if a mail for this alert has already been sent from another logged in user with an active dashboard displaying the same alert.

The threshold and the email notification must already be defined on the alert itself for this setting to take effect. See section 19.2.3.

19.4 Retrieving Data From Outside AMOS: External Alerts

The alerts defined above collect their data from inside your AMOS database. However, the expression you use to define the alert value can also come from a power script global function. This means that you can retrieve data not only from inside AMOS, but also from external sources. For example, you might display stock market values on your dashboard, or the number of incoming/outgoing portal files, etc. Such alerts can remotely access the relevant window and open it, even when the window or application is outside of AMOS.

To define external alerts, rather than inserting SQL syntax in the Alerts Configuration window, you insert a function definition. The name of this function must begin with 'f_alert' - for example, 'f_alert_my_function'. The name must also be unique and distince from any functions internal to AMOS. When used, the **Designated Window** column should be disabled.

This function requires two arguments as per the following table:

Name	Type	Value	Meaning
QueryValue	Integer	0 1	Return alert value Perform drill down action
Alert ID	Decimal {0}	<any value>	Primary key of the alert

The function must return a long value as per the table below:

Query Value	Return Value	Meaning
1	-1 0 1	An error occurred Function performed no operation Function performed action in response to drill down action. Possibly opens a window listing a report of the values behind the alert.
0	-1 0 >0	An error occurred Alert has value 0 Alert has value >0

When the dashboard calculates the value of an external alert, the function executes and the result is displayed on the dashboard. When a user double-clicks the alert to drill-down, the function is called and subsequently performs the drill-down action.

CHAPTER 20 Printer Tasks

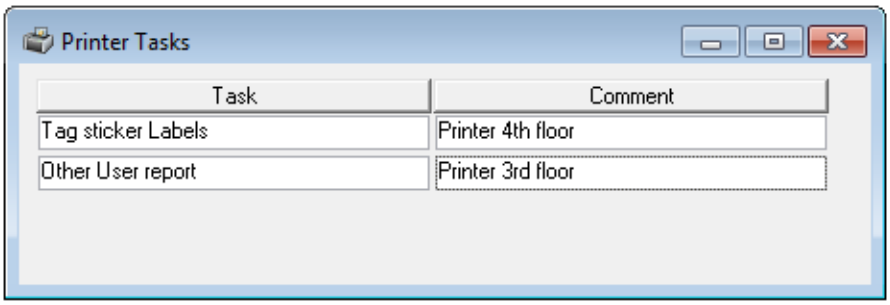
Printer tasks handle reports printing on a designated printer:

1. Define the tasks. See section 20.1.
2. Assign a task to a report. See section 20.2.

20.1 Defining Printer Tasks

To create the tasks that will then be available in the Reports Menu window:

1. Go to **Tools > Configuration > Printer Tasks**.
2. Click **New**.
3. Give the **Task** a name, and add a **Comment** to describe it:



4. **Save** the task.
5. Go to **Options > Printer Task Configuration**.
6. Select a printer in the Task Configuration window **Identification** field.

   If no printer names are available, go to **Options > System Printers** for AMOS to add the printer definitions available on your PC into its own database. After AMOS imports this information, you can select a printer from the **Identification** drop-down list.
7. (Optional) Describe the printer in the **Comments** field.
8. Enter how many **Copies** this task should print.
9. Lookup the **Paper Source** for the selected printer.
10. **Save** and close the window to return to the Printer Tasks window.

20.2 Assigning Printer Tasks To Reports

Printer tasks handle the report printing on a selected printer. To assign a task to a report:

1. Go to **Tools > Configuration > Extension Features > Reports Menu**.
2. Select a report in the hierarchy and open the Misc. tab.
3. Select a **Printer Task** from the drop-down list.
4. **Save** and exit the window.

20.3 Printing Barcodes On Labels

You can print barcodes on labels: for example, to display a stock item's code as a barcode rather than as a numeric value, on a printed label.

This requires:

1. Downloading and installing a barcode font.
2. Altering the amosw.ini file to indicate that the font is in use.
3. Updating any existing label printing report, or creating a new one.

To download and install a free code128 font set see:

http://freebarcodefonts.dobsonsw.com/code128font-download.html

Select the Code 128 Font file only (Windows installer) option and then follow the steps in the setup wizard to install it.

Then, add the following section to the amosw.ini file:

```
[Customisation]
Code128=B,128,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,55,56,
57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72,73,74,75,76,77,78,79,80,81,82,83,84,85,
86,87,88,89,90,91,92,93,94,95,96,97,98,99,100,101,102,103,104,105,106,107,108,109,110
,111,112,113,114,115,116,117,118,119,120,121,122,123,124,125,126,145,146,147,148,149
,150,151,152,153,154,155,156
```

Save the ini file.

Next, open your label printing report. Update it so that the stock code or value you want to print as a barcode rather than as a numeric code, is set to use the newly installed code128 font.

CHAPTER 21 SMS Notifications

You can configure your system to send SMS messages from AMOS to most mobile phones[1]:

- AMOS can automatically send sms messages to a designated user when a record's status is changed using the work flow; and
- AMOS can send sms messages to a designated user to notify him/her if an error occurs when the Task Server is running any import/export task.

To use this functionality, you require a device that is able to communicate with your PC and contains an open and available modem that can transmit sms messages. Most mobile devices have this capacity. Your PC connects to the mobile device via a COM port - either with a cable or through bluetooth. You can connect multiple devices - as long as the definition for each one references a unique COM port.

1. Create a notification task. See section 21.1.
2. Connect one or more devices. See section 21.2.
3. Define a mobile number on recipient AMOS users. See section 21.3.
4. Adjust the work flow. See section 21.4.
5. Send messages via the work flow (see section 21.5); or, set the Task Server to send a message if an error occurs (see section 21.6).

21.1 Creating A Notification Task

1. Go to **File > Export/Import > Tasks**. Click **New** to create a task.
2. Select **Type** 'Export' and **Format** 'Notification'. Give the task a **Description** like 'SMS Notification'.
3. Set frequencies and make sure to flag the task **Active**.
4. **Save** and exit the window.

[1]The modem inside the mobile device must be accessible by third parties.

21.2 Connecting A Device

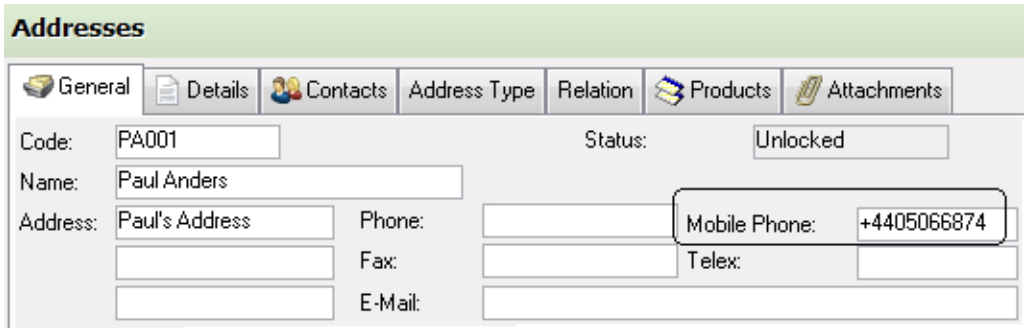
1. Connect your mobile phone to the computer. Ensure that Windows detects it, and assigns it a COM port.
2. Go to **Tools > Configuration > Notification > Notification Configuration**.
3. Click **New** to setup a new phone connection. Enter a **Code** and **Description**. Flag the **Active** checkbox.

   It is possible to connect multiple devices and make an active configuration for each one. Each device entry requires a unique COM port number.
4. Enter the **COM Port** Windows provided.
5. Click the **Device Identification** button and AMOS will lookup the connected device.
6. Click the **Server Identification** button and AMOS picks up your computer or server name, and so links to the task server which will process the notification.
7. **Save** the entry.
8. The Verify tab contains commonly used preset commands. To check if you are connected, select the command 'AT' from the list and click **Send**.

   The COM port responds 'OK' if the connection is correctly established.
9. **Save** and exit the window.

21.3 Defining Mobile Numbers On Notification Recipients

1. Go to **File > Open Register > Addresses**.
2. Select or create an employee address:

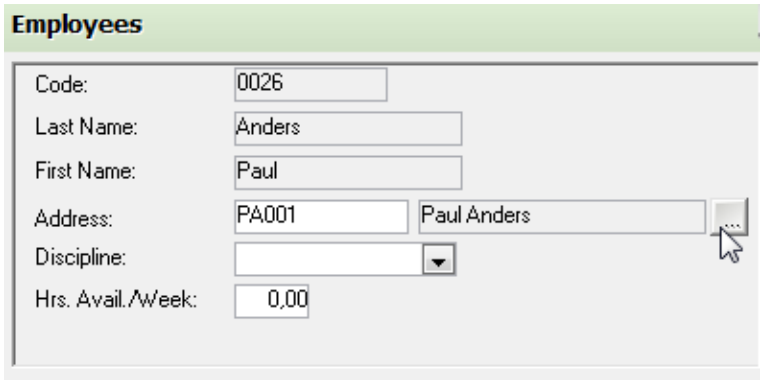


3. Make sure this address has a **Mobile Phone** number. Add one if needed, and **Save** the address.

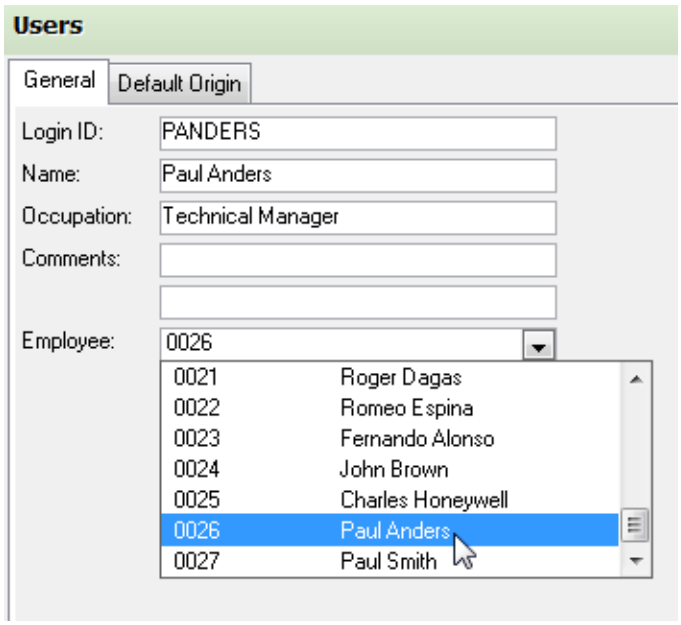
   Some prerequisites to consider:

   If the address is not already connected to the employee record, go to **File > Open Register > Employees**.

   Select the employee and lookup the address:



Make sure the employee record is also linked to an AMOS user record, at **Tools > Configuration > Access Control > Users**:

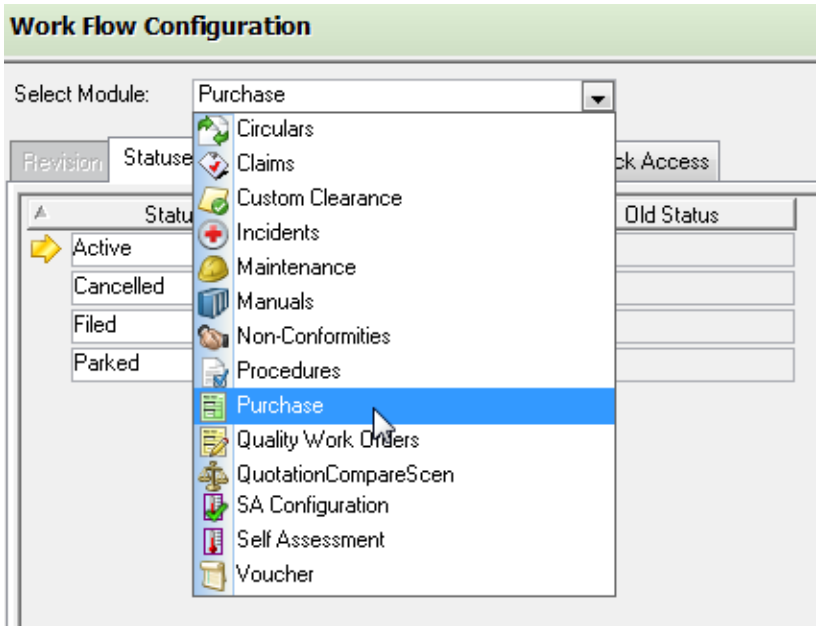


21.4 Adjusting The Work Flow

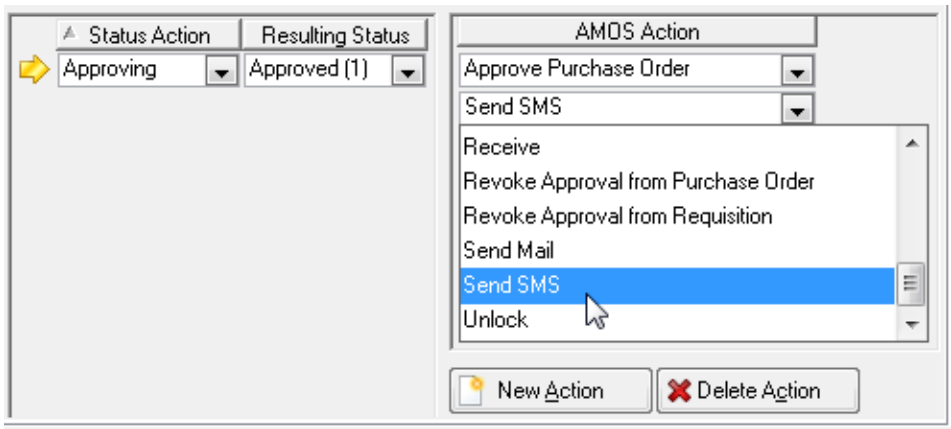
AMOS will automatically send sms messages to the designated user when a record's status is changed using the work flow: for example, when a purchase order is 'approved'.

To allow AMOS to do this, your work flow configuration needs to include the AMOS action 'Send SMS'.

1. Go to **Tools > Configuration > Work Flow**.
2. Select a **Module**:



4. Choose a transformation and then add the **AMOS Action** 'Send SMS' to it:

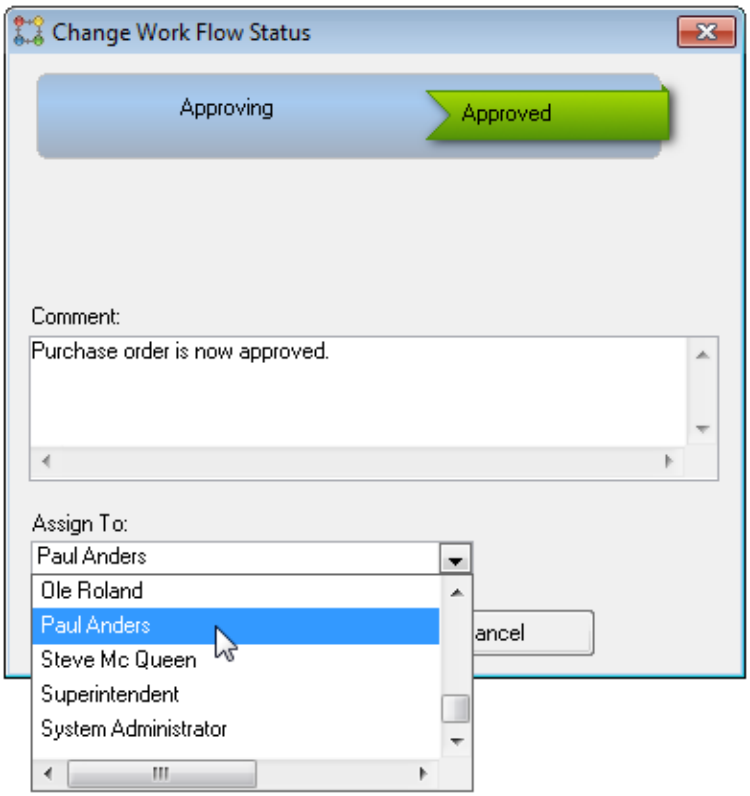


5. **Save** and exit the window.

Ensure that the system parameter controlling work flow for the selected module is activated.

21.5 Sending An SMS Via The Work Flow

1. Open a window where the work flow has been configured to send messages.
2. Select a record and go to **Options > Work Flow**.
3. Choose the work flow action which will send an sms.
4. Enter a **Comment**: this is the sms text. There is a 160 character limit.
5. Select the recipient from the **Assign To** list: an AMOS user with a mobile phone number defined on their address record:



6. AMOS carries out the work flow action(s) and sends an sms to the selected user.

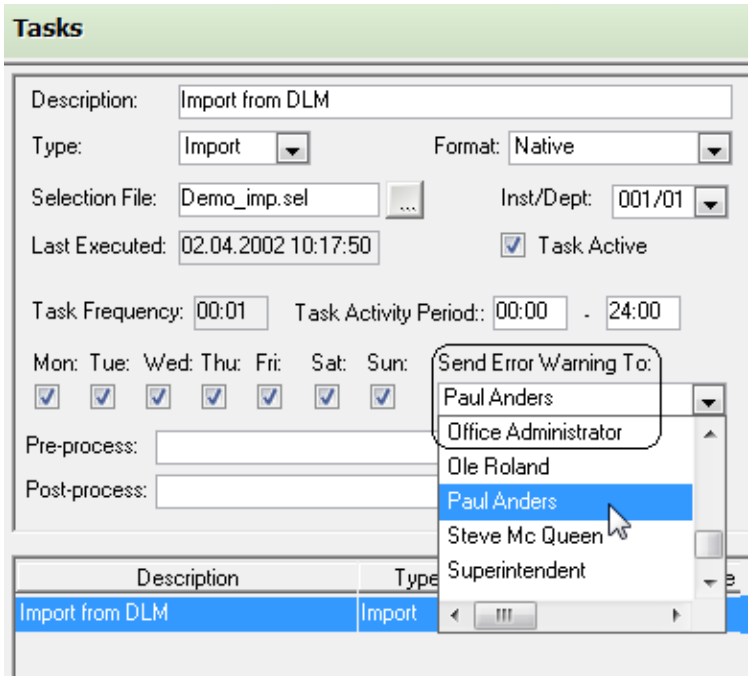
SMS messages are queued on the server, then sent to the connected mobile and transmitted. Once sent to the mobile, AMOS considers the message sent- if there is no service or another problem with the mobile phone AMOS will not notify you.

NOTE: Limits to this functionality are inherited from your mobile phone. SpecTec recommends you use only English letters in sms messages.

21.6 Notifying A User About An Import/Export Task Error

AMOS can send sms messages to a designated user if an issue occurs when the Task Server is running any import/export task:

1. Go to **File > Export/Import > Tasks**.
2. Select a task in the Task Server list.
3. Choose a user with a mobile phone number defined on their address record from the **Send Error Warning To** list:



4. **Save** the task.

Remember, a message will not be sent to the user if the issue occurs with the sms notification task itself.

CHAPTER 22 Extension Features

Extension Features allow you to customise some areas of AMOS Business Suite:

- **Reports**. Create and add your own user-defined reports, and add them to Reports hierarchy.
- **External Modules**. Integrate certain external programs and user-defined PowerBuilder modules into the AMOS Business Suite.
- **Access Modules**. Set up new groupings to show in the Access Control window. User defined reports and external modules must be added to an access module so that user groups can be assigned the rights to use them.

22.1 User-Defined Reports

In addition to the pre-defined reports included with AMOS Business Suite, you can create tailor-made reports for your organisation using PowerBuilder or InfoMaker. When the report has been created and stored in a .pbl library file, to make it available for selection in the Reports browser:

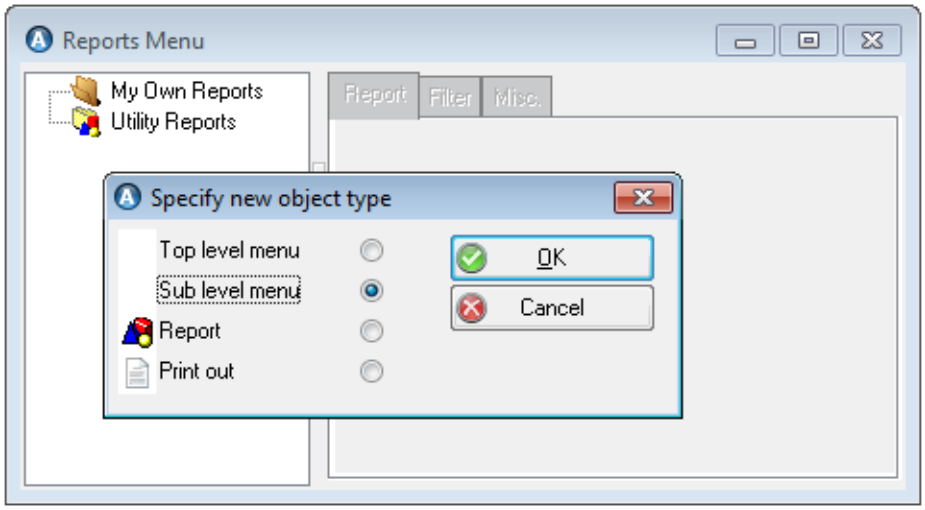
1. Add the new report to the hierarchy. See section 22.1.1.
2. Create an access module and add the report to it. See section 22.3.
3. Grant user groups access to the report. See section 22.3.

22.1.1 Adding A Report To The Hierarchy

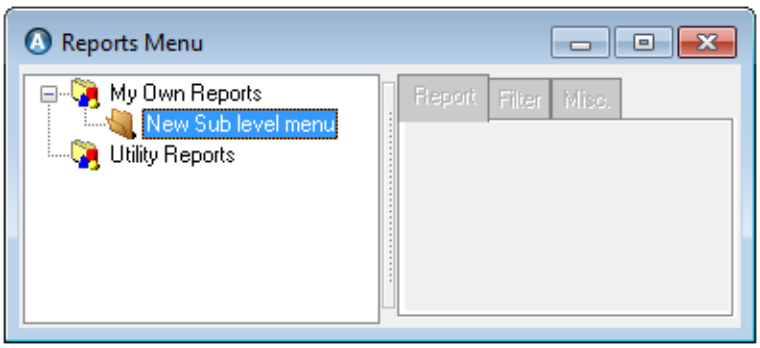
> **EXAMPLE**
>
> You have created a new user-defined report called Tag Stickers. You want to create a folder to contain the report, and add it to the standard AMOS Reports window.

To include a user-defined report in the Reports window hierarchy:

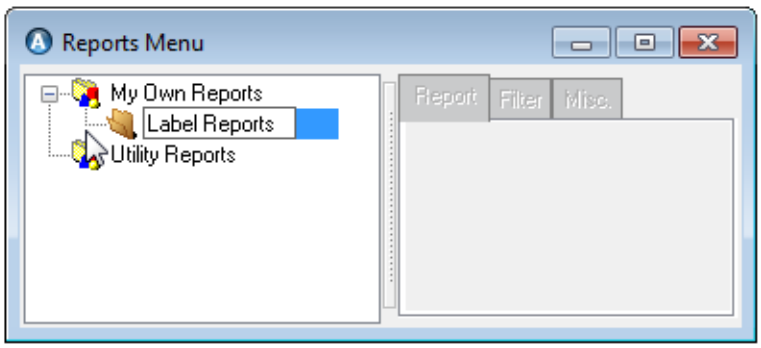
1. Go to **Tools > Configuration > Extension Features > Reports Menu**.
2. Click on a folder in the hierarchy pane and then click **New**:



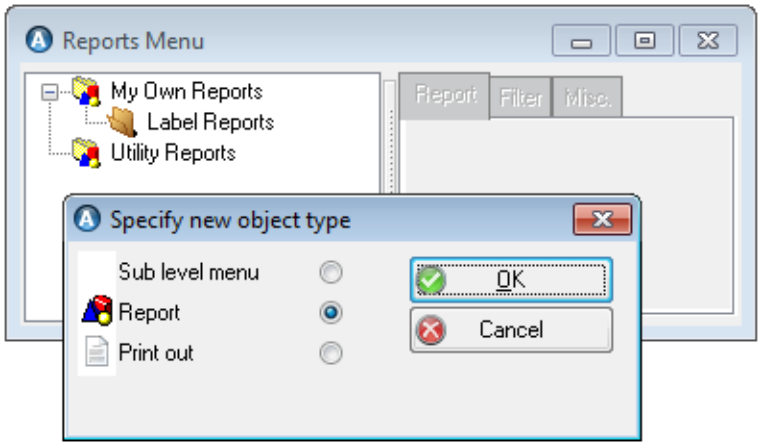
3. Click **Sub level menu** to add a folder and then click **OK**.
4. A new folder appears in the tree structure:



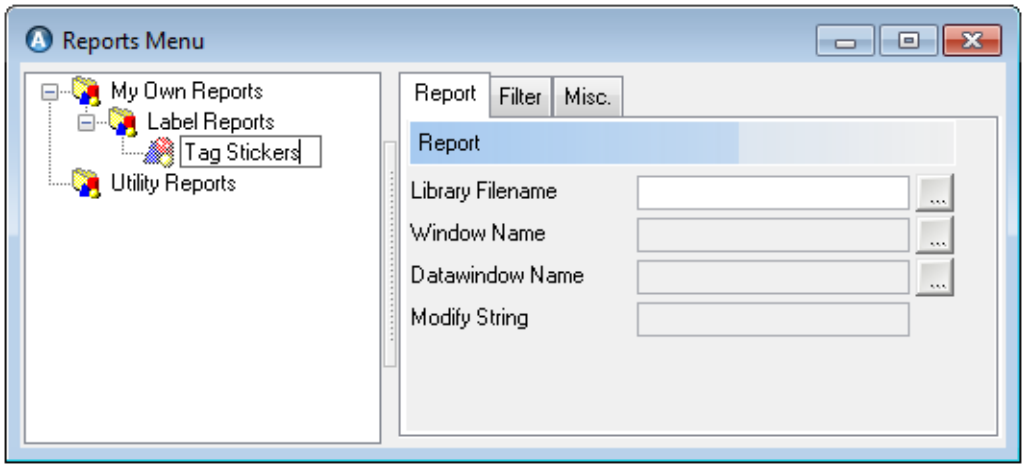
Click on the folder name to change it:



5. With the new folder selected, click **New** again and this time choose **Report**:



6. Click **OK**. Name the newly added report:



7. Lookup the **Library Filename**: the folder where the report definition is stored.

   Use a library file with the file extension .Pbl or .Pbd[1]. If you select a library file stored in the Report directory, only the file name is used in the field. If the file is stored elsewhere, the full path name of the library file is used.

8. Lookup the **Datawindow Name**: the name of the data window of the report, from a list of available windows in the selected library. Choose one to get access to the last field on the tab.
9. (Optional) Add a **Window Name** for the report's window.
10. (Optional) Open the Filter tab to add a filter to the report.
11. **Save** your report. Until the report is added into an access module, it will not be available for use.

AMOS can make modifications on a report when it is run. See section 22.1.1.1 about using Modify Strings.

Printer tasks handle the report printing on a selected printer. If any have already been created, you can select one in the Misc. tab. See Chapter 19 about printer tasks.

[1]If you use a library file of the type .Pbd, fill in the fields Window Name and Datawindow Namemanually.

22.1.1.1 Modify Strings

You can set up the AMOS Business Suite to make modifications on a report when it is run - for example, that the report should use the number mask defined in the System Parameters window Auto-Numbering folder.

1. Go to **Tools > Configuration > Extension Features > Reports Menu**.
2. Select a report in the hierarchy.
3. Enter a mask in the **Modify String** field. To define multiple text strings, separate them with spaces.

These are the mask names and the corresponding modify strings that you can use:

Component Number Mask	#CompNoFormat#
Form Number Mask	#FormNoFormat#
Function Number Mask	#FuncNoFormat#
Stock Item Number Mask	#PartNoFormat#
Transport Number Mask	#TransDocNoFormat#
Work Order Number Mask	#WONoFormat#

NOTE: The Modify String text is case sensitive.

When you specify a mask, enter the name of the field in the data window where the modification should be applied. The same applies to the property of the field that should be changed. For example, a data window called d_test may contain a column field called formno. This shows the form number associated to a Purchase Order, making it logical to display the number with the mask defined in the system. Enter the following value in the **Modify String** field:

- formno.format=#FormNoFormat#

  This tells AMOS that the field property of the formno field is the mask defined as the Form Number Mask.

- Define an edit mask for query data windows for when the user enters numbers in a field. The property is called editmask.mask. If you have a number field and want it to use the Form Number Mask, use the following field value:

  formno.editmask.mask=#<Xxxx/No>#

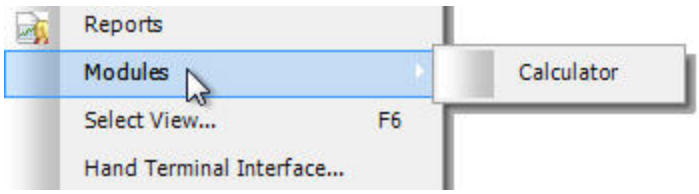
22.2 Adding External Modules To AMOS

Integrate certain external programs (like Excel, Word, Notepad) and user-defined PowerBuilder modules into the AMOS Business Suite:

1. Define an external program/module. See section 22.2.1.
2. Create an access module and add the external module to it. See section 22.3.
3. Grant user groups access to the external module. See section 22.3.

22.2.1 Defining An External Module

When you add the first external module to AMOS, a new entry is created on the Tools menu: 'Modules'. The Modules sub-menu will list available programs[1]:



To integrate an external module, for example, the calculator:

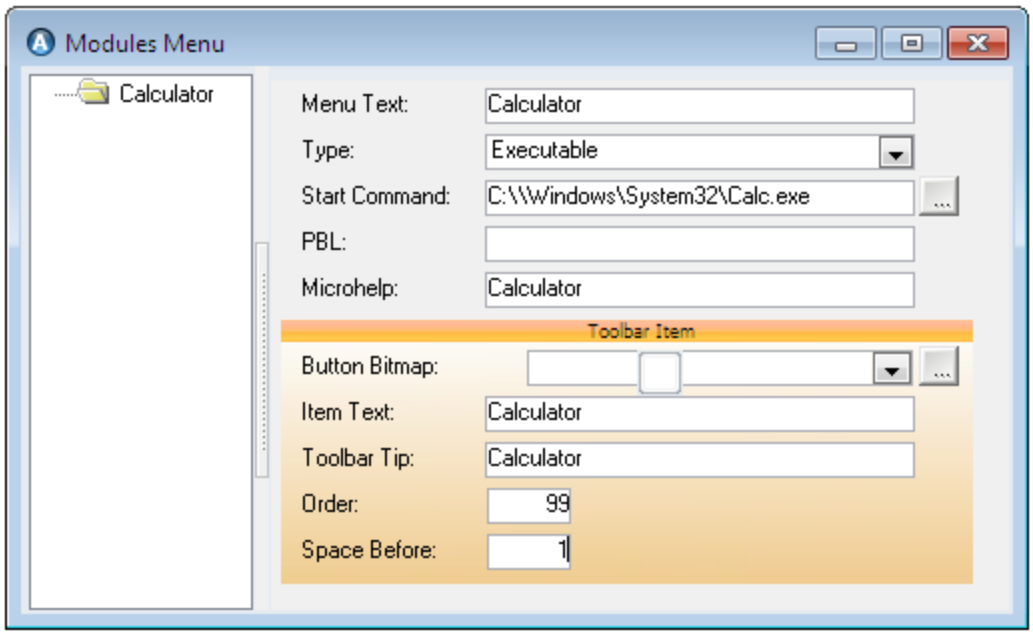
1. Go to **Tools > Configuration > Extension Features > Modules Menu**.
2. Click **New**.
3. Type 'Calculator' in the **Menu Text** field. This will appear in the Modules sub-menu.
4. Select a **Type**:

- **Executable** for external programs;
- **Executable blocking application** for external programs that will halt the operation of AMOS until they are run and closed;
- **PB Function** for PowerBuilder executable programs.

5. Lookup the location of the .exe file to launch the program, in the **Start Command** field.
6. Add text to appear in the lower left hand corner of the screen in the **Microhelp** field.
7. For the Toolbar:

- **Button Bitmap**. Browse to your own graphic button to place on the toolbar, or choose a pre-defined one from the drop-down list.
- **Item Text**. Text to appear on the button[2].
- **Toolbar Tip**. Text to appear when you hover over the button.[3]
- **Order**. Where the button will appear on the toolbar; generally set to higher values, i.e. 99 or 100 or greater.
- **Space Before**. Amount of space between this button and the one to its left on the toolbar; generally set to 1.

[1] Modules menu entries are accessible according to user access rights.
[2] Displays if the Toolbar text option is switched on in the Tools > Options window General tab.
[3] Displays if the Toolbar tips option is switched on in the Tools > Options window General tab.



8. **Save** your module. Until the calculator is added into an access module, it will not be available for use.

Whenever you make changes to the Modules menu, re-start AMOS Business Suite to show the changes.

22.3 Access Modules

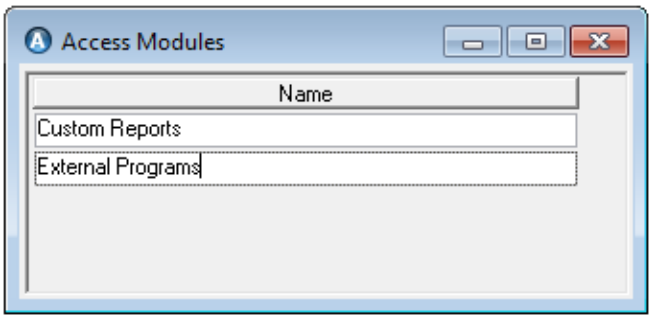
Set up new groupings called Access Modules, to list in the Access Control window. User defined reports and external modules must be added to an access module so that user groups can be assigned the rights to use them.

1. Create an access module. See section 22.3.1.
2. Add your new user-defined report or external program to it. See section 22.3.2.
3. Grant user groups access to the contents of the access module. See section 22.3.3.

22.3.1 Creating A New Access Module

To create a new access module:

1. Go to **Tools > Configuration > Extension Features > Access Modules**.
2. Click **New**.
3. Enter a **Name**,like Custom Reports or External Programs:



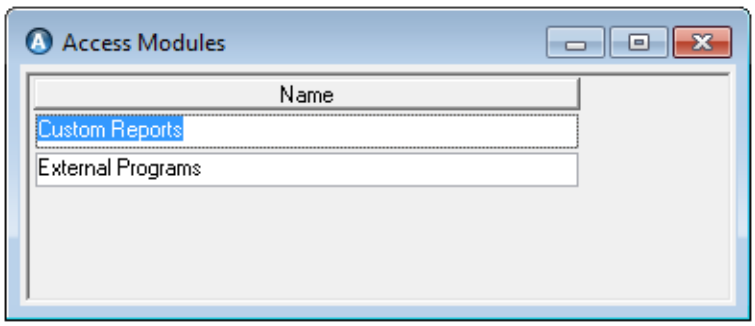
This is what will appear in the Reports/Modules tab on the Access Control window.

4. **Save** and exit the window.

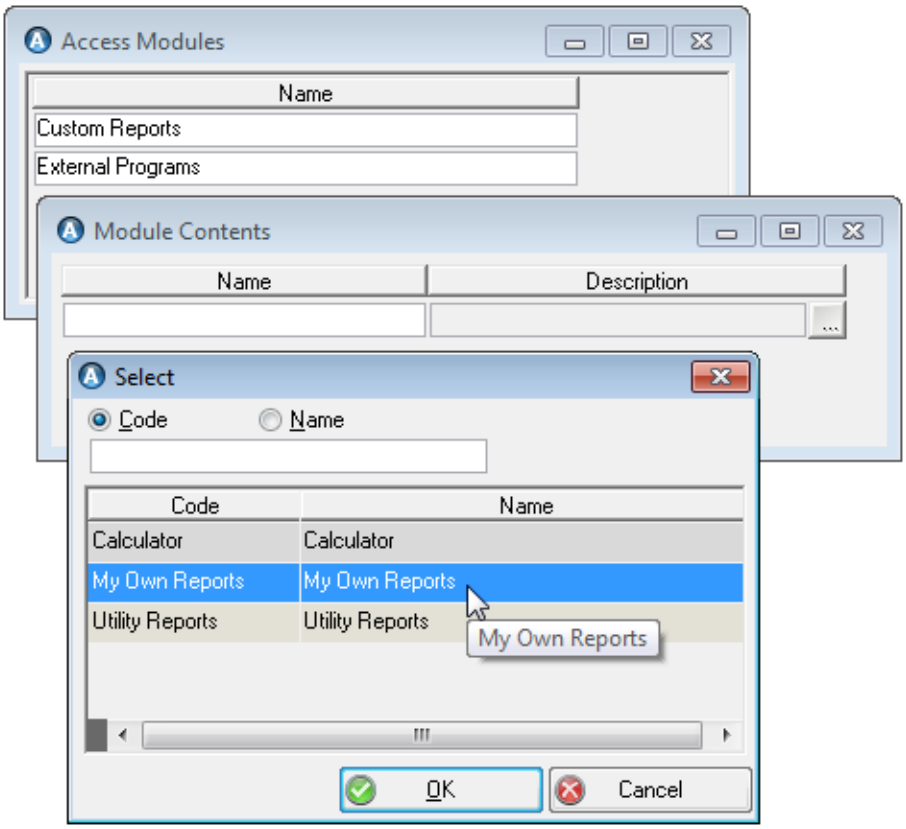
22.3.2 Adding A User Defined Report/External Module To An Access Module

When you add a new user-defined report or define an external module, it will not be available for use until it is added into an access module:

1. Go to **Tools > Configuration > Extension Features > Access Modules**.
2. Select an access module:



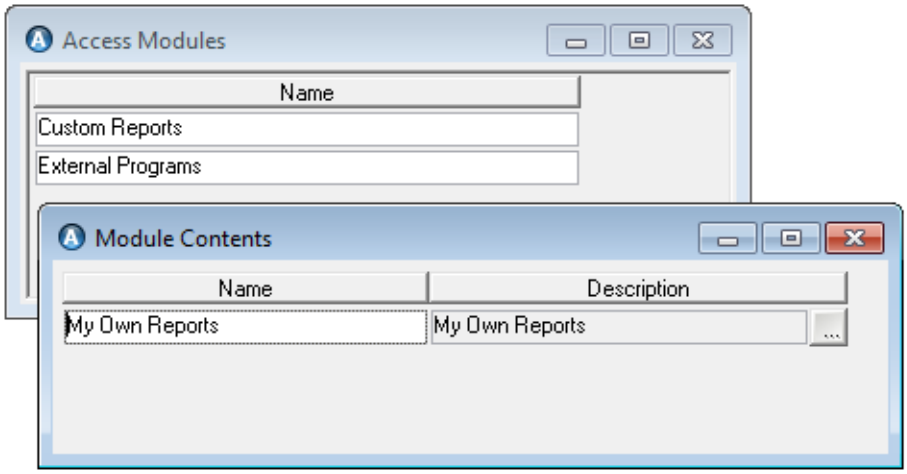
3. Go to **Options > Module Contents**.
4. Lookup the new report/external module:



In the case of a report, all entries in the reports hierarchy must be added to make this report accessible - that is, the top level menu, all sub-level menus and the Report itself.

You can add more than one report/external module into the same access module.

5. Click **OK** to add the selection to the Module Contents list:

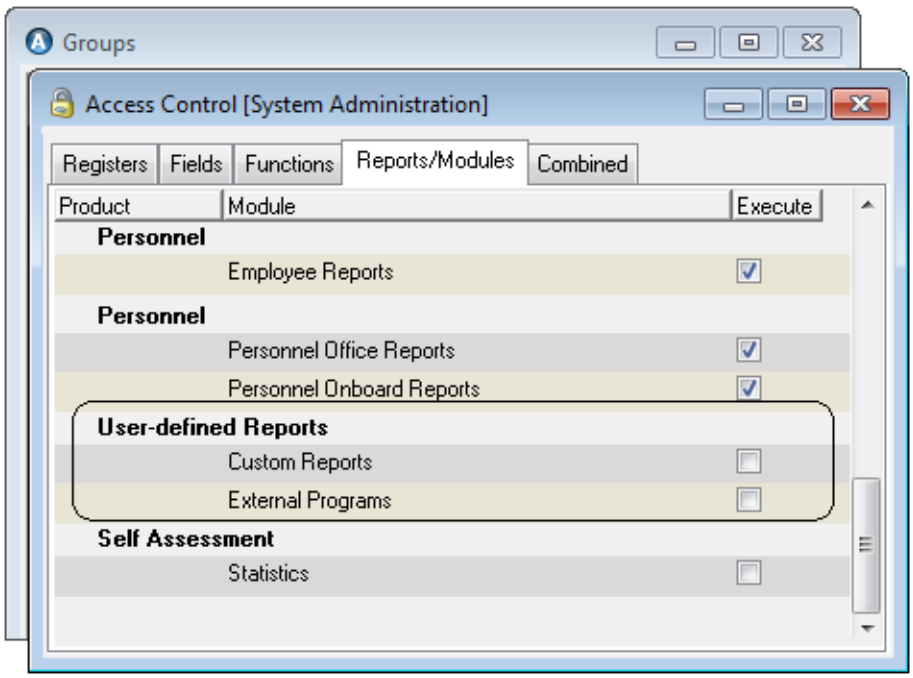


7. **Save** and close the Module Contents window to return to the Access Modules window.
8. **Save** and close the Access Modules window. Now you can grant the relevant user groups access to the reports/external modules contained in the access module.

22.3.3 Granting User Access To Reports Or External Modules

Once you have created a new report/external module and added it to an access module grouping, grant user group access to it as needed:

1. Go to **Tools > Configuration > Access Control > Groups**.
2. Select a Group to grant access to.
3. Go to **Options > Access Control**.
4. Open the Reports/Modules tab. Scroll down until you see the User-Defined Reports section with your access module(s) underneath it:



5. Check **Execute** beside the access module entry to allow the user group access to the reports/external modules contained in the access module grouping[1].
6. **Save**the window.
7. Restart AMOS for these changes to take effect:

- User-defined external programs/modules will be available at **Tools > Modules**.
- User-defined reports will be listed in the **Tools > Reports** window.

[1]As listed in the Module Contents window; see section 22.3.2.

CHAPTER 23 Setting Up Budget Codes And Formulae

Budget Codes and use of the AMOS Budgeting functions are discussed the *AMOS M&P User Guide*. However, the three windows for configuring certain fundamental aspects of the Budget module are accessed at **Tools > Configuration > Budget**, and are listed below.

23.1 Budget Codes

Your budget is set up using Budget Codes, which may correspond to the various account numbers from the accounting system. Once the budget codes have been established, and actual amounts have been entered for each one, AMOS M&P may be used to automatically compare the amounts actually spent to the budgeted amounts.

To add a new Budget Code:

1. Go to **Tools > Configuration > Budget > Budget Codes**. The Budget Codes window opens.

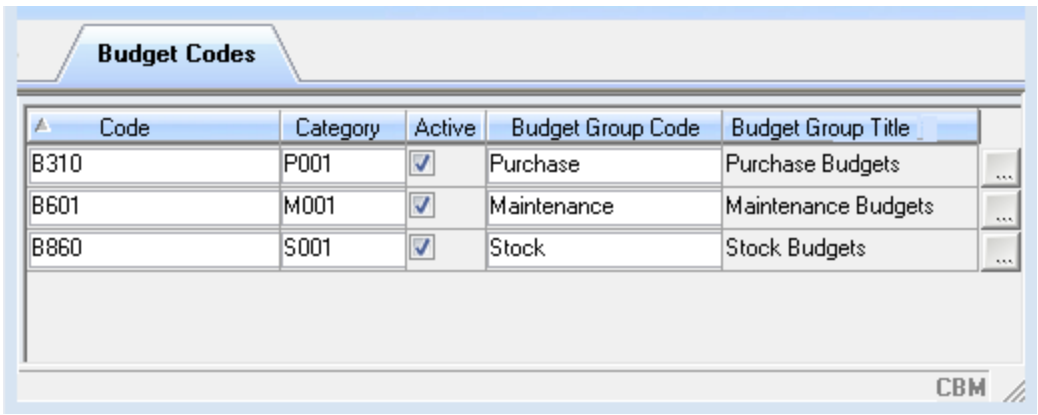


Figure 95 The Budget Codes window

2. Click **New** in the toolbar to create a new budget code.
3. Type the **Code** and **Category** in the relative fields and make sure that the **Active** checkbox is checked.
4. Use the **Budget Group Title** lookup to create a budget hierarchy. Using budget hierarchies is described in the *AMOS M&P User Guide*.

Access to Budget Codes determines which Groups can see and use them. Access is granted at **Tools > Configuration > Access Control > Groups > Options > Budget Code Access**.

23.2 Budget Commitment Formula

It is possible to define Purchase Form costs against a budget as a **Forecast**, rather than a Commitment. This means that the form would not yet have an impact on the budget commitment, but it may have one, in the future. This functionality is enabled by its own set of parameters and access rights. When these parameters and access are set accordingly, an additional column appears in the Budget windows, called Forecast. This column appears in addition to the columns **Committed** and **Paid**. The Budget Formula window allows you to define the types and statuses of forms which will impact each of these three columns. The form status can affect the columns in different ways:

- **No impact** (set None) - the selected status will have no effect on the budget at all
- **Forecast** - the selected status will effect the Forecast column in the budget windows
- **Committed** - the selected status will effect the Committed column in the budget windows, and in turn, the Paid column, depending on which field the cost is registered against on the form.

To enable this functionality, set the system parameter and access rights below, as follows:

1. Go to **Tools > Configuration > Parameters > Options > Financial >** 'Allow User-defined Impact on Purchase Budget'.
2. The default setting is FALSE. Change it to TRUE by clicking the lookup button and selecting TRUE in the dialog that appears.
3. **Save** the setting. This allows users to custom define which form status (Split, Cancelled, Parked, etc.), affects which budget column (Committed, Paid or Forecast). A new field, Forecast, will appear in the Budget windows and on Budget reports.
4. Close the Parameters window, and go to Tools > Configuration > Budget > Budget Commitment Formula. The corresponding window opens.
5. This window contains columns in three groups:

- **Type** - a list of form types: Purchase Order, Requisition Form and Query.
- **Status** - the workflow statuses that apply to forms, such as Split, Cancelled, etc.
- **Impact** - three lists with radio buttons: None, Forecast and Committed.

> **NOTE:** If Purchase workflow is in use, the system will only provide the workflow status column to register the impact against.

6. Use this window to define whether or not each form/status combination will have an impact on either the Forecast or Committed column in the Budget windows, or no impact at all.
7. **Save** your settings and close the window.

Read more about this functionality, in the *AMOS M&P User Guide*.

23.3 Generate Budget Codes

> **NOTE:** The Generate Budget Codes function is located in the **Tools > Configuration > Budget >** menu from version 9.0 (M&P version 7.1) onwards.

Generate Budget Codes was introduced for AMOS M&P version 5.4.00 due to alterations in the way the application handles budget codes. If you have already upgraded all your installations to 5.4.00 or above or have begun using the application from this version, you should ignore this menu entry.

NOTE: It is very important that users of AMOS M&P who are upgrading to 5.4.00 or above from a previous version, should read the relevant release notes for the correct procedures when using this function.

CHAPTER 24 Condition Based Maintenance

Condition-based Maintenance (CBM) provides a means of integrating various equipment measurements and monitoring systems with the maintenance features of the AMOS Business Suite. Any or all periodically planned jobs can be activated prior to their normal due date, as dictated by the deterioration of the equipment. In this way, planned and condition-based work can be completely integrated.

In addition, the CBM module also offers an automated mechanism for updating counters in the system (like running hours). These can be discreet values (like temperature or pressure), or accumulated ones (e.g. running hours, take-offs, etc.).

Finally, AMOS supports a CBM dialog from several sources at the same time, allowing the system to simultaneously connect the various data capture systems installed at the site.

NOTE: Remember that the CBM is not an alarm system. CBM-active values should indicate non-critical states as compared with alarm levels; therefore, the monitoring system must make a distinction between these two degrees of severity. The principle behind the CBM module is to stop the trend before the alarm level is reached. Since the CBM module is designed to provide a signal prior to the alarm level, maintenance periods can then be stretched as far as possible without endangering the equipment. However, the CBM Alarm interface does allow AMOS to communicate with any ECMS to process alarms.

24.1 Overview

The CBM solution is based on the transfer of special information files between the data capture system(s) and the AMOS Business Suite. These files are called CBM day-files, as they are named according to the date when they are written.

These day-files are written by monitoring and other data capture systems to a directory shared with AMOS and contain the ids of measure points or values which have either reached a pre-defined CBM-active threshold, show an unwanted trend or simply have updated counter information.

The shared CBM directory must be on a file server which is accessible to the various systems, and where the AMOS Business Suite has been instructed to search for day-files at pre-defined intervals. As day-files are found, they are processed and deleted if the operation went without error. Otherwise, they are renamed to prevent the system from attempting to process them again and the user is alerted.

During day-file processing, each line in the day-file is read by AMOS and matched to one or more components in the system. At this point maintenance work is flagged as CBM-active and/or counters are updated with new values.

24.2 CBM Jobs

All periodic jobs registered in the AMOS Business Suite have an attribute called CBM Status. This value reflects the current state of the job with regards to condition-based maintenance signals received. In other words, any scheduled job in the system can be activated by an external monitoring system via the CBM module interface, causing it to appear in a check-list or Work Order printout regardless of its normal schedule.

In order to view the **CBM Status** of a job, simply bring up the job (using the **View** button in the Jobs tab of the Component window).

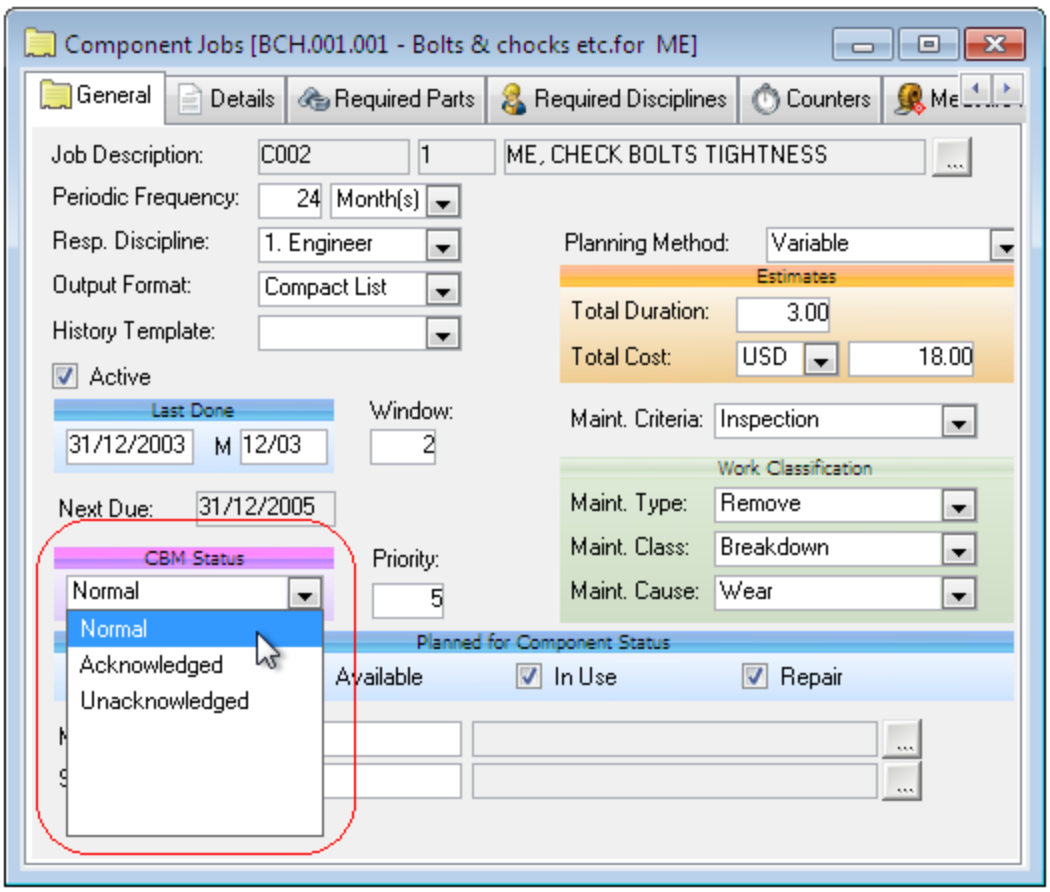


Figure 96 An Example of the CBM Status Alternatives

The three CBM status values have the following meanings:

Normal	Indicates that this job is not CBM-active, and that it is included in the maintenance plan according to its schedule.
Acknowledged	This is the value set for CBM-active jobs that have been issued.
Unacknowledged	When a job is first triggered by the CBM module due to information in a day-file, then its CBM status is set to Unacknowledged. The job will keep this status until it is included out in a maintenance printout, or manually reset.

AMOS signals the user of the general CBM status through the CBM state indicator at the bottom right-hand corner of the screen.

This indicator is red if there is a single job with the CBM status of Unacknowledged. If there are no unacknowledged jobs, but some have the status Acknowledged (e.g. CBM-active, but issued), then the indicator is yellow. Otherwise, green shows that there are no CBM jobs which need immediate attention, or which are pending.

24.3 The CBM Module

The CBM module consists of parameter settings and the CBM References window. The parameters are found at **Tools > Configuration > Parameters >** .

24.3.1 Parameter Settings

The following parameters are found at **Tools > Configuration > Parameters >** :

Directories > CBM Directory - defines the location where the system can find CBM day files. Default setting: the CBM sub-folder of the AMOS Business Suite Installation.

Options > General > Default Settings > Initial CBM Work Order Status - controls the Initial Status of Work Orders when CBM is in use. The available options are Requested, Planned and Issued. Default setting: ISSUED.

Options > General > File Extensions - these parameters allow you to set the file extensions used in AMOS.

Options > General > Maintenance > Auto-Filing Of Work Orders > Auto-File Completed CBM Work Order - set to TRUE, CBM work orders are filed automatically when the status is set to Completed. Set to FALSE, it is necessary to manually file such work orders. Default setting: TRUE.

Options > General > Maintenance > Auto-Filing Of Work Orders > Auto-File Controlled CBM Work Order - set to TRUE, CBM work orders are filed automatically when the status is set to Controlled. Set to FALSE, it is necessary to manually file such work orders. Default setting: TRUE.

Options > General > Maintenance > Seconds Between each CBM Check - controls the frequency at which the system checks for CBM activity. Default setting: 180.

24.3.2 CBM References

Each line of information in a CBM day-file contains a code identifying the measure point from which this data was read. In order to match the measure point code with the correct components, jobs and/or counters in AMOS, the system needs some sort of 'look-up' or reference table. Select **Tools > Configuration > CBM References** to use this function.

The register that opens contains a list of all known CBM measure points together with the components to which they are attached, and their installation/departments:

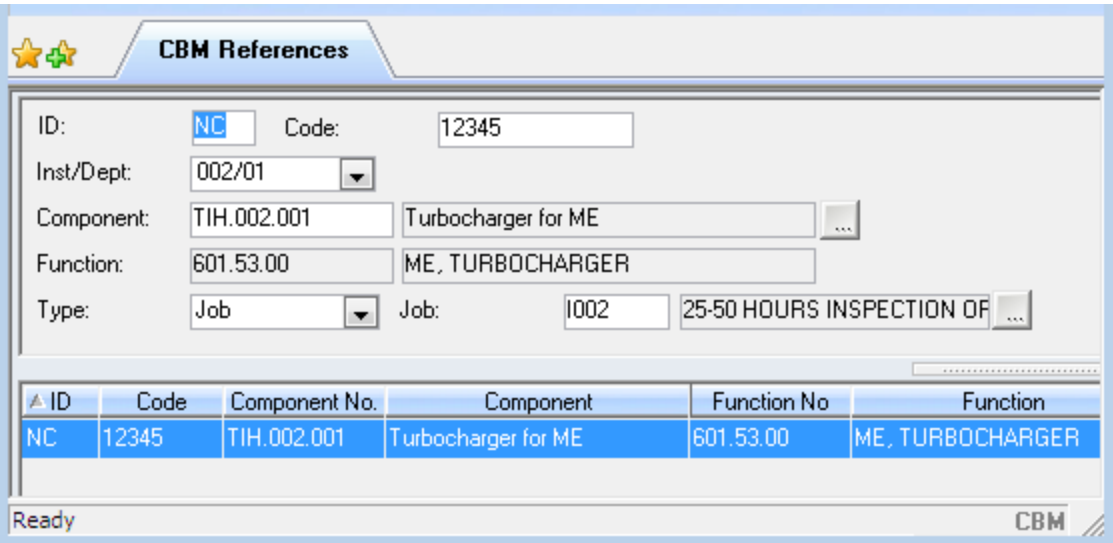


Figure 97 The CBM References Window

Each entry in the reference table has the following fields:

ID	Two-character code identifying which data capture system this entry applies to. The ID is part of the file extension used during import.
CBM Code	The ID of the measure point in the data capture system. Part of the file content and identifies the record.
Inst/Dept	Contains the installation and department number of the component that this measure point is linked to.
Component	This is for the number of the component whose counter is to be updated, or whose CBM work is to be activated, or both.
Type	This field tells whether the entry is of the counter update, measure point update or job activation type.
Job Code	If this reference is for activating CBM work, then this field will contain the code of the job attached to the specified component to be triggered.
Counter	For counter update references, this field indicates which counter to update.

This table is a global one, applying for the entire company, and specifying references to components in any or all installations and departments.

NOTE: There may be several references for the same CBM code, allowing a single signal from the data capture or monitoring system to activate any number of jobs, or update any number of counters for different (or the same) components. Similarly, the same component may appear in several references, again facilitating both job activation and counter updates for the same piece of equipment.

24.4 Day Files

As mentioned above, day-files are used to transfer CBM information between data capture and equipment monitoring systems and the AMOS Business Suite. As was also mentioned above, day-file are named after the date when written:

19970428.%NC

The filename is a date is in the form YYYYMMDD with an extension made up of a percent sign (%) followed by a two-character code called the CBM id. This CBM id tells the system which data capture system created the day-file.

CBM ids should be unique for every supplier of data capture and equipment monitoring systems. Some examples are NC for NorControl and SP for SPM Instrument International. Since day-files created by systems from different suppliers have dissimilar extensions, then these files can co-exist in the same CBM directory without conflicting with each other.

Each day-file contains the CBM information accumulated for a single day from a single monitoring system. When this system needs to register additional information for the same date, it must append this data to the same day-file. CBM day-files are in ASCII text format, each line ending with a carriage return character. These lines may be in one of two formats:

<code>	Containing only the measurement point code, this type of day-file entry indicates that one or more jobs needs to be flagged as CBM active.
<value>, <code>	Indicates a change to the counter or measure point tied to the specified <code>.

Where the <value> field shown above is a numeric value followed by a Counter code (like 'H' for 'Hours').

Therefore, the following examples are all valid CBM day-file entries:

- MAIN_EXH_VALVE
- TEMP_POINT_3
- +10.5,DIESEL_GEN_1
- =53.25,MAIN_COMPRESSOR
- =1054H,PACKING_MACH_1

The first two lines above would be signals from the monitoring system that related CBM jobs needed to be carried out. The third line specifies that 10.5 be added to the counter registered for the measurement code DIESEL_GEN_1. The next line sets the counter for MAIN_COMPRESSOR to 53.25 (using the default counter which is Hours). Finally, the last line also sets the total value of the Hours counter, this time updating the PACKING_MACH_1 counter to 1,054 hours.

24.5 CBM Alarm Interface

As discussed above, the AMOS CBM module consists of parameter settings and the CBM References window. AMOS CBM can also communicate with any ECMS (External Condition Monitoring System) to process alarms.

The communication between the two systems is performed by exchanging files of a predefined format. Both systems update the same file. AMOS will also store the file information in the database for later reference.

24.5.1 Flow Of Events

1. An Alarm is generated by the ECMS.

   If the Alarm is determined valid, it is marked for export, and then exported.

2. The AMOS CBM module receives information about the alarm. A work order is generated based on this information.
3. AMOS exports the work order information.

4. The ECMS imports the work order information, and the alarm is locked.
5. AMOS users process the work order and mark it as completed. Notification of the work order's status is exported.
6. The ECMS imports the work order information and the alarm is unlocked.

24.5.2 Communication Between The ECMS And AMOS

To ensure ECMS support on all AMOS-supported DBMS, the communication between the two systems is achieved via text files.

24.5.2.1 File Format

The files are saved as ANSI text where carriage returns appear as characters 0x0d and 0x0a. The section and attribute names are case insensitive. Each file contains only one [Alarm] or [Workorder] section, with 'key' (and values) as listed:

[<Section>]

<key>=<value>

<key>=<value>

24.5.2.2 Date Format

Date will be presented in the files as:

YYYYMMDDHHMMSSFFF

FFF is optional.

24.5.2.3 Files Sent To AMOS

Files coming from the ECMS sending to AMOS must be called:

<Anything>.<ECMS>.toamos

For example, for SPM Instruments <ECMS> is SPM.

These '.toamos' files are deleted after a successful import. The file content is logged in the table ECMSLog. If an error occurs, the file will be renamed to:

<anything>.<ECMS>.toamos.error

and the error will be written to an Error 'key'.

24.5.2.3.1 Content in a To AMOS File

Section = [Alarm]

Key	Description	Mandatory	From
CBMID and CBMCode	Those two values identify for which component and job a work order must be created. (Must be defined in CBM References).	Yes	ECMS
ECMSIdentity	Not used by AMOS, but is used by the ESMC to identify the alarm.	No	ECMS
WOCause	This text will be placed in the Work Order Cause column, if work order column is empty. The existing value will not be replaced.*	No	ECMS
Error	Error message, if any from AMOS.*	No	AMOS

*String without carriage return

Following is an example of a file To AMOS (from ECMS):

[Alarm]

CBMID=AA

CBMCode=001

ECMSIdentity=100000012

WOCause=The ball bearing is vibrating to much

AlarmDate=20070430120159

24.5.2.4 Files Sent From AMOS

Files being sent from AMOS to the ECMS must be called:

<Anything>.<ECMS>.fromamos

For example, SPM/CondMaster must regularly search for files ending with '.spm.fromamos'.

24.5.2.4.1 Content in a From AMOS File

Section = [Workorder]

Key	Description	Mandatory	From
ECMSIdentity	Not used by AMOS, but is used by the ESMC to identify the alarm.	Yes	AMOS
WorkOrderID	Primary key in the work order table for AMOS.	No	AMOS
WordOrderNo	The work order identification.	Yes	AMOS
Created	Date time when work order was created.	No	AMOS
WorkOrderComment	Work order Action Taken.	No	AMOS

Following is an example of a file From AMOS:

[WorkOrder]

ECMSIdentity=100000012

Workorderid=12000031

WorkorderNo=61/00003

Created=20070525000000000

Completed=

24.5.2.5 AMOS Processes

24.5.2.5.1 Work Order Generation

During work order generation in the AMOS CBM module the work order will be filled with the following information:

Cause = ECMSLog. WO CauseAMO

Title = as default in AMOS, job Description Title (as found in the CBM reference)

WoNo = automatically generated work order number

24.5.2.5.2 Work Order Completion

When the AMOS work order is completed two fields in the file will be set and sent over to ECMS:

[Work Order Comment] = Action Taken

[Work Date] = Completed date + completed time

CHAPTER 25 The AMOS E-Business Direct Solution

AMOS e-Business Direct transforms all the paperwork, manual entry of price information, and sending out requests for quotations into an automated process. It allows AMOS users to send purchase documents such as Requests for Quote and Purchase Orders as email attachments in the form of an HTML document, directly to vendors upon printing the form to portal.

This portal works as other drivers, sending purchasing forms between your system and selected vendors:

1. A user prints a form to the portal and the form is tagged and queued for export.
2. The driver picks up that form, converts the data into XML, JSON or pure HTML and creates an HTML page.
3. The HTML page is stored in the portal outbox and sent automatically to the vendor's email address.
4. The vendor receives the email and can open and read it. He or she can also fill in information, and then select a command on the page.
5. The system then produces another email with this data and sends it back to the AMOS user.
6. AMOS reads the incoming mail and produces an import file.
7. The file is processed and the form is updated with the new data.

25.1 Configuration

Configuring the AMOS e-Business Direct functionality consists of the following process:

1. Set Sharing
2. Set Access Rights
3. Set the System Parameters
4. Setup the AMOS e-Business Direct Users within your organisation
5. Define the Portal format
6. Register the Portal
7. Connect the Vendors

You can also choose to create Import/Export Tasks to further automate the process, and to create custom templates so that the emails sent to the vendor reflect your own company style.

25.1.1 Set Sharing

The following sharing parameters for e-Business are available at **Tools > Configuration > Parameters > Sharing > Tables >** :

- e-Business Portal
- Portal Log
- Quotation/Portal
- Order Form/Portal

Before changing any sharing parameters, we recommend that you contact your local SpecTec representative for advice.

25.1.2 Setting Access Rights

Access rights to the following registers are required to set up the e-Business Direct module:

- e-Business Formats
- e-Business Portals

e-Business Direct users may require access to the following fields:

- Form: Portal Queue
- Quotations: Portal Queue

For advice on setting Access rights, please contact your local SpecTec representative. Note that access to the Portal Queue checkbox allows users to simply check the box, thereby exporting the e-portal and bypassing the portal validation and print operation.

25.1.3 Set System Parameters

The following system parameters control the behaviour of AMOS e-Business Direct. They are found at **Tools > Configuration > Parameters > Options > General > Portal > [Parameter Name]**. It is up to you to set these parameters as desired, or leave them with the default settings.

For further information and advice, please contact your local SpecTec representative.

Billing Address

The Billing Address parameter is where you define the code for the address where purchase invoices should be sent. When you enter the Billing Address filter you will be presented with the Addresses window from which you can chose the correct address. The chosen address will be shown as an eight digit code.

Default value: Empty

Log Successful Portal Operations

Set to TRUE, the system will store successful portal operations in the portal log.

Default Setting: FALSE

Portal Line Item Reference Priority

If the value for this parameter is set to VendorRef, MakersRef the system writes the Vendor Reference value into the XML file if both values are available. If only one of the two is available, that value is written into the XML file. If this parameter is set to MakersRef, VendorRef the

Makers Reference is written to the XML file as the Identification value.

Default setting: MakersRef, VendorRef

Prevent Update of Quotation When One is Selected

When set to TRUE and a vendor is selected, the XML file will not be imported and will be renamed to *.OnOrder. If set to TRUE and no vendor is selected, the XML file will be imported. Set to FALSE the portal will import the XML file whether a vendor is selected or not.

Default setting: FALSE

Show Error Messages During Portal Export

This parameter, if set to FALSE, allows Portal Export to continue uninterrupted in the event of errors occurring during export. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an export error occurs and further data export will be stopped until the error message is cleared by the user.

Default setting: TRUE

Show Error Messages During Portal Import

This parameter, if set to FALSE, allows Portal Import to continue uninterrupted in the event of errors occurring during import. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an import error occurs and further data import will be stopped until the error message is cleared by the user.

Default setting: TRUE

Store Imported XML Document in Portal Log

This parameter, when set to TRUE, allows you to see the imported XML document associated with the selected error message in the Portal Log, accessed via the Options menu. If set to FALSE, there will be no Options menu available and no XML documents will be stored.

Default setting: FALSE

25.1.4 Setup AMOS E-Business Direct Users

For each individual in your organisation who will use AMOS e-Business Direct you must link an Address record to the Employee, and then link their AMOS User record to their Employee record. This will enable the exchange of emails between AMOS Users and your vendors:

1. Go to **File > Open Register > Addresses**.
2. Click the **New** button on the toolbar.
3. Create an address record for the employee. It is mandatory that you specify their email address in the appropriate field. Note that this is the email address the vendor will send the information to.
4. If you enter a phone and/or fax number, these numbers will also be sent out with the

forms to the vendor.

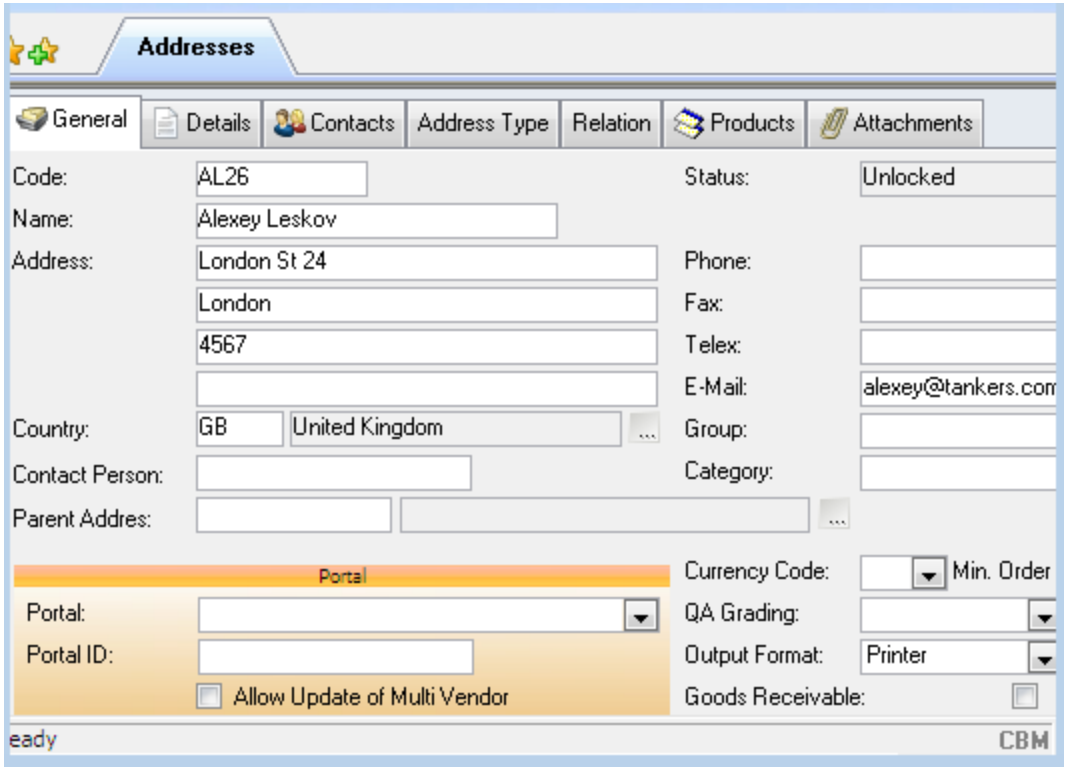


Figure 98 Creating an Address Record for the Employee

5. **Save** the record, and close the window.

   If your system license contains AMOS Personnel, carry on to step 6.

   If you do NOT have a license for Personnel, skip step 6 and go directly to 7.

6. Go to **Crewing > Employee**. In the Employee Overview window, click the **New** button and create a new record for the employee. Be sure to follow your standard company procedure for creating a new employee.

   Save the new record and close the window.

7. Go to **File > Open Register > Employees** to link the address record to the employee record.

8. In the bottom list part of the window, find the employee record and select it. The employee **ID**, **Last Name** and **First Name** appear automatically in the fields at the top of the window.

9. Click the **Address** lookup button and select the new address you created in step 3.

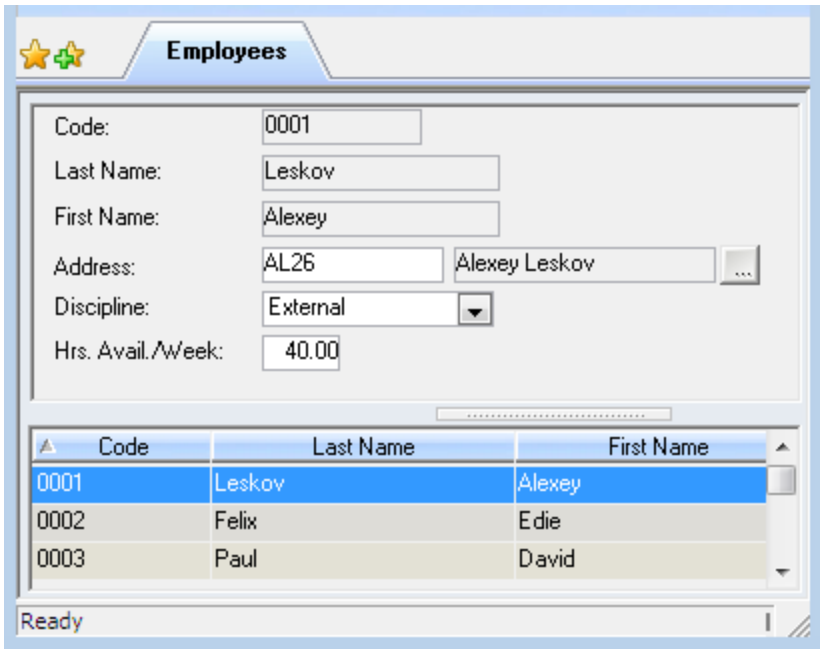


Figure 99 Linking the Address Record to the Employee Record

10. No further details are necessary; however you can add a **Discipline** and the hours of **Availability** if that is in accordance with your company procedures.
11. **Save** the record. Close the window.
12. Now link the Employee record created in step 6, to an AMOS User record: Go to **Tools > Configuration > Access Control > Users**. Click the **New** button in the toolbar.
13. Enter a **Login ID** and **Name**, and fill in the **Occupation** and **Comments** fields as needed.
14. Use the **Employee** drop-down list to select the employee created in step 6.

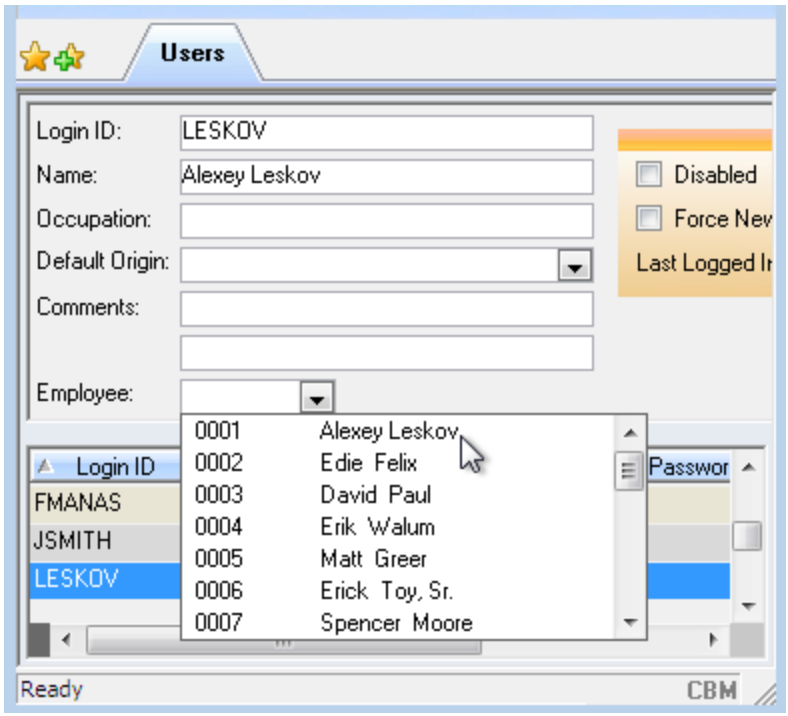


Figure 100 Linking the Employee Record to an AMOS User Record

15. **Save** the record and close the window.
16. Repeat this process for every individual in your organisation who will use AMOS e-Business Direct for purchasing.

NOTE: New users should be connected to relevant User Groups (with Access rights) within your system. See Chapter 14 for more information about User Groups and Access rights.

When you are finished linking all the necessary Employee and User records, AMOS e-Business Direct will be available for those users only.

25.1.5 Define The Portal Format

1. Go to **Tools > Configuration > e-Business > e-Business Formats**.
2. In the window that opens, click the **New** button on the toolbar.
3. Fill in the fields in the blank line, as follows:

- **Description** - create a name for the Format.
- **Driver** - use the lookup to select the amosebusinessdirect.pfd file located in your AMOS Business Suite installation folder. AMOS will automatically add the entire path into this field. Ensure that you delete the path, so that only the file name shows as in the illustration below.

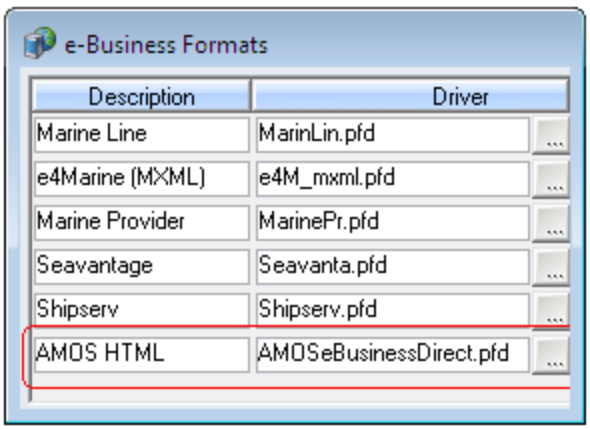


Figure 101 The e-Business Formats window

NOTE: Portal Format Drivers (*.pfd files) are copied into the root installation folder at installation of AMOS Purchase. The file amosebusinessdirect.pfd is the pfd for the AMOS e-Business Direct solution.

- **Import/Export Function** -contain the necessary commands to activate the required function from the driver file. If these fields are empty and the correct driver file installed click on the lookup buttons at the right of these columns and the application will automatically import the function files from the driver file.
- **Version** - contains the identification code for the driver you are using. Driver files may be periodically updated and you can check this code to ensure that you are using the most

up to date drivers.

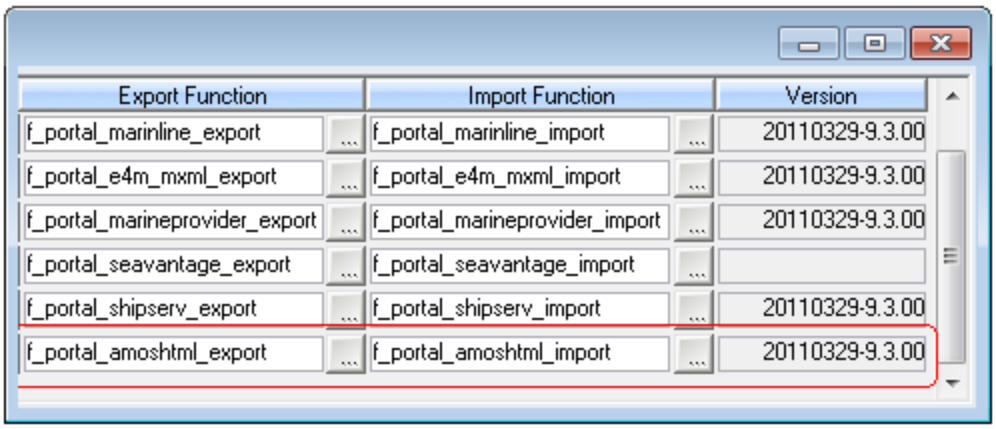


Figure 102 The e-Business Formats window

4. **Save** the information, and close the window.

25.1.6 Register The Portal

Set up portal transactions in the e-Business Portals window to channel functions directly to the portals:

1. Go to **Tools > Configuration > e-Business > e-Business Portals**.
2. In the window that opens, click the **New** button on the toolbar.

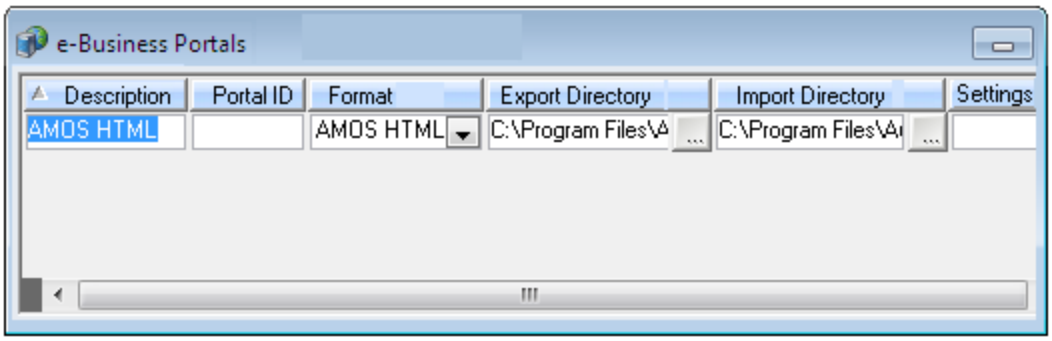


Figure 103 The e-Business Portals window

3. Enter a name for the Portal in the **Description** field.
4. Leave the **Portal ID** field blank.
5. Use the drop-down list to select the **Format** you defined in section 25.1.5.
6. **Export/Import Directory** - use the lookup buttons to set these directories to the folders where HTML files are stored upon export and retrieved for import.
7. Enter the **Settings** - this column is to contain a string of setting names and numbers, separated with ;

   To enter a setting string, click the lookup button. A new dialog will show all available settings/attributes for the selected portal, and you can set the values as appropriate. Any previously set attributes will be displayed and a blank line in the list lets you add your own settings, as needed. Clicking **OK** in this dialog returns you to the main window, and displays the setting string in the **Settings** column. Settings without a value will not be added to the Settings list.

   The following settings are available.

- **MailMessageFile** - a TXT file containing the text of an email sent to a vendor. If the txt file is missing or empty, standard text will be inserted into the email as follows: 'Please open and read the Attachment File.'. To send custom text, save your email text into a text file, and then enter the reference to the file's location and name in the settings field with this parameter. For example, MailMessageFile=c:\mail.txt. The contents of the mail.txt file will then replace the standard text of the outgoing email. Using this parameter, the standard messages for RFQs (Quotations) and POs (Purchase Orders) are the same. To insert separate messages for RFQs and POs, use the parameters below.
- **MailMessageFileRFQ** - to insert a message as above, but specifically for RFQs, use this setting to insert your custom text. If there is no value for this setting, any text entered for MailMessageFile will be used for Quotations.
- **MailMessageFilePO** - to insert a message as above, but specifically for POs, use this setting to insert your custom text. If there is no value for this setting, any text entered for MailMessageFile will be used for Purchase Orders.
- **POFTemplate** - an HTML filename with path, that contains your organisation's Purchase Order Form style.
- **RFQTemplate** - an HTML filename with path, that contains your organisation's Request for Quote style.
- **SendMail** - must be set to TRUE. FALSE can only be used in the setup process (to avoid sending the mail), for debugging purposes.
- **ReturnMailAddress** - a valid address used to receive data back from the supplier.
- **XMLConfiguration** - the XML data island configuration file, which tells how to retrieve and build the XML data that will reside inside the portal produced HTML document.
- **AllowUpdateInMultiVendor** - if set to TRUE users can update multi vendor details from portals. Conditions on address and portal level must be met to enable this: in the Address window, check the Allow Update of Multi Vendor checkbox. The set purchase unit for the item must be the same as the unit quoted by the supplier, to update price. The Update Stock Items checkbox on the Quotations window must be checked. If the vendor exists on the Vendor tab in Stock Items, the price will be updated. If the vendor does not exist on the Vendor tab, the vendor will be added with the newly quoted price.
- **AddCheckSum** - set to TRUE, a comment will be inserted into the file to be used for tamper control. See section 25.6 for more information.
- **SMTPServer** - the name of the SMTP server.
- **SMTPPort** - the port to connect to the server, usually port 25.
- **SMTPUser** - the user name on the SMTP server, if the server requires it.
- **SMTPPassword** - the user password on the SMTP server, if required.
- **HTMLType** - tells AMOS which type of HTML file to produce. There are three values available: HTML/XML, HTML/JSON or HTML/NoScript. Read about these settings and the types of files they produce, in section 25.5.
- **JSONLibrary** - when the HTMLType is set to HTML/JSON, this setting tells AMOS how to link the JSON library to the produced HTML file. The three values available are: INTERNAL, URL or FILE. See section 25.5.2.2 for more information.
- **MarkOfTheWeb** - due to increased security restrictions in the Local Machine Zone (when running with WinXP SP2), dynamic data in HTML files sent to vendors is sometimes not displayed. Mark of the Web (MOTW) is a feature of Windows Internet Explorer used to determine the security zone of the page. When MOTW is set, the value will be added to the HTML document and Internet Explorer will assign the page to the Internet Zone instead of the Local Machine Zone, displaying the dynamic data correctly.

  A sample setting string assuming the use of custom templates could look like this:

MailUser=JoeDoe;MailPassword=xyz;POFTemplate=Z:\AMOSe-BusinessDirect\Pot.html;RFQTemplate=Z:\AMOSe-BusinessDirect\RFQt.html;SendMail=TRUE

8. **Save** the information and close the window.

25.1.7 Connect Vendors

For each of the vendors you will exchange purchase data with through this portal, create a vendor record, and connect it to the new driver by defining the portal, email address and output format:

1. Go to **File > Open Register > Addresses**. Use the filter to search for an address that already exists, or click **OK** to go straight to the window.
2. To create a new record, click the **New** button on the toolbar and fill in the vendor's details.
3. Make certain to enter the correct **E-Mail**.
4. Use the drop-down list to select the **Portal** you have created in the previous two sections.

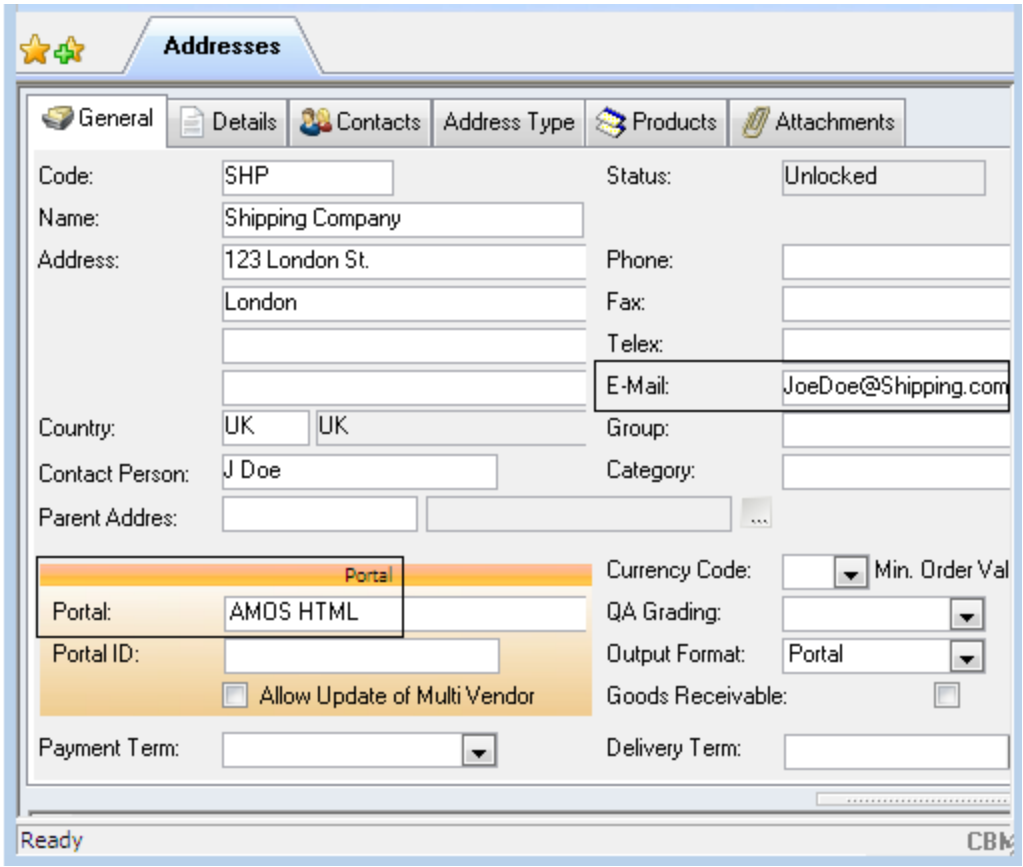


Figure 104 A Vendor Address record connected to Portal

5. Select 'Portal' from the **Output Format** drop-down list.
6. **Save** the record.

25.1.8 Create Import/Export Tasks

To automate the sending and receiving of information transferred through the portal, you can set up an Import task and an Export task for the TaskServer:

1. Go to **File > Export/Import > Tasks**. Click **OK** in the filter to open the window.
2. Click the **New** button on the toolbar.
3. Fill in the data fields. Ensure that you select the **Format** 'Portal'.
4. **Save** the information, and repeat to create both the **Import** and **Export** tasks.

For more information on creating import and export tasks, see Chapter 4.

25.1.9 Create Custom Templates

You can attach custom templates to forms, for use with the portal, so that the form reflects your company style.

1. To generate a custom template, first generate a default one: create a new HTML file without any template at all, and then reuse that HTML as the default.
2. Copy the file and rename it to indicate that it's the customised one.
3. Place it in a location accessible to all your AMOS users.
4. Edit the file using any HTML editor or text editor.
5. Ensure that the **Settings** field in the e-Business Portal window contains the path and name of your new template in the settings string: i.e. POFTemplate=C:\AMOSe-BusinessDirect\POt.html.
6. Subsequent Purchase Orders send through the portal will reflect the template's style.

25.2 Using AMOS E-Business Direct

The AMOS e-Business Direct solution allows exchanges of the following forms, over email through the designated portal:

From your organisation to a vendor:

- Requests for Quote (RFQ)
- Purchase Orders (PO)

From the external vendor, to your organisation:

- Quotations (QT)
- Purchase Order Confirmations (POC)

To utilise the functionality, first configure the system as described in the previous sections. Then:

1. Open the Form window, and create and save a new form as usual. When selecting the vendor(s), ensure that each one is defined as a Portal vendor.
2. Tag the form, and choose **File > Print**. The Print Tagged Forms dialog opens.
3. Select your Destination, in the **Destn** drop-down list, as Portal.
4. Click **OK**.
5. After printing to portal, the **Portal Queue** checkbox on the form is marked and the form is queued for export.
6. If you created import/export tasks for this function (see section 25.1.8, the portal is exported automatically through the taskserver. If not, export it manually by selecting **File > Export** and choosing the portal.

   The **Portal Queue** form field will become unchecked, and an HTML file is created and held in the folder defined for the portal.

7. AMOS connects to the mail client and the email is sent to the vendor.
8. The vendor receives the email, and can register details such as **Currency** and **Price** on a Query form, or on a Purchase Order, can click command buttons to **Accept** or **Reject** the order, etc.
9. The vendor then clicks **Send**, and an email is sent to the AMOS user.
10. The returned forms are saved in the import directory in your system. If you created import/export tasks for this function (see section 25.1.8, the portal is imported automatically through the task server.

    If not, import it manually by selecting **File > Import**, and choosing the portal.
11. AMOS connects to the mail client and retrieves the mail. The system performs the updates to the form, transferring in the vendor's input.
12. The updated form is now available as usual in the Forms window.

25.2.1 Saving Content

It is possible to save your HTML files and their content if you want to continue working on the same file at a later stage. For example, a vendor receives a Request for Quote for 300 items, saves the HTML file in a local folder and begins working on it, registering prices for 100 item. Rather than completing it and sending it immediately, to save the file and continue working on it at another time simply click the **Save Details** button on the form. All details will then be stored and appear the next time this form is opened. Clicking the **Delete Details** button will clear all the previously saved details on this form only - for example, after the quote has been sent.

NOTE: The content in HTML files (generated by AMOS or others) cannot be saved to hard disk. Instead, the data in HTML files is saved into what is referred to as cookies. There are size limits on cookies, unrelated to AMOS. When a cookie reaches its limit, the web browser will simply remove the older data and insert the new data. As a result, part or all of the HTML form data might not be loaded.

25.3 SMTP Options

AMOS offers SMTP as a system for sending mail through e-Business Direct portals, in addition to the default system MAPI. While systems running MAPI receive security messages to indicate that mails are being sent on their behalf, SMTP systems do not receive these warnings and therefore do not require any acknowledgements before mails can be sent. To enable the use of SMTP, set the portal setting SendingMailProtocol value to SMTP. Then set the remaining portal settings for SMTP as appropriate and the system will send mail using this protocol. There will be no mails in the sendbox, as the system will not connect to a users mailbox on this protocol. If MAPI remains set as the default protocol, mails will be sent as before and the other portal settings for SMTP will be ignored.

25.4 Customisation

Users can configure the data to be retrieved on Portals, making the user in full control of the e-business portal driver. This allows full customisation of the content of the HTML documents, including the presentation of the data and which data to include.

For example, with this functionality users can write an SQL statement in the configuration file as required and AMOS will then produce the data in XML format inside the HTML file. Advanced

users can remove all the HTML tags and extract the XML data , saving it into a separate .xml file. This xml file can then be used in other applications that are able to read .xml files, such as Microsoft Excel.

The user's SQL might result in text containing RTF formatting, since the SQL can retrieve data from several columns, the text might be a combination of RTF text together with TXT text. For example,

<TXT> + <RTF> + <RTF> + <TXT> - where TXT is normal text without rtf formatting and RTF is text with RTF formatting. AMOS can remove all the RTF formatting in any sub-string and provide a string with all text in TXT format (classic) only.

25.5 3-In-1 Portal Driver: Three HTML Concepts

The AMOS e-Business Direct portal driver is supported by Microsoft Internet Explorer version 5.0 and later. As of AMOS Business Suite 9.2, e-Business functionality is now expanded to support all major browsers by the introduction of a three-in-one portal driver concept. This allows AMOS to provide three different types of HTML files, and so enables support on most web browsers. To achieve these three different types of HTML files:

- HTML code is combined with XML data, or,
- HTML code is combined with JSON (JavaScript Object Notation) data, or,
- HTML code is used alone without any need for java script.

You may register the e-Business Direct portal driver multiple times in AMOS, specifying a unique name and configuration for each, thereby enabling AMOS to support all three combinations at once. The type of HTML file AMOS should produce for each configured portal driver is defined by the **Portal Setting 'HTMLType'**. See section 25.1.6 about Portal Settings.

These three types of HTML configuration are described in the following sections.

25.5.1 HTML/XML

Setting the HTMLType definition to HTML/XML produces an HTML file containing an XML data island. This requires JavaScript to be enabled within the browser and is only supported by Microsoft Internet Explorer.

Adding an XML data island into the HTML file and then reusing the data within the same HTML files is a concept defined by Microsoft and not adopted by other suppliers of web browsers. This has always been supported by the AMOS e-Business Direct portal driver; read about it in section 25.4. AMOS allows you to define the content of the data island and allows you to reuse it in both Purchase Order and Quotation type HTML files.

NOTE: HTML/XML and Internet Explorer 10

Microsoft Internet Explorer 10 does not support XML data islands, for improved interoperability and compliance with HTML5. This means that XML data islands are now parsed as HTML, just like in other browsers. This change can impact pages written exclusively for Windows Internet Explorer.

For this reason, SpecTec recommends changing the portal setting from 'HTML/XML' to 'HTML/JSON'. Ensure that Java Script is enabled in your Internet Explorer 10 setup. Any custom template HTML files may need to be adjusted.

Metadata added to the HTML file by AMOS tells Internet Explorer to execute the HTML file in Internet Explorer 9 mode.

25.5.1.1 Customisation: Data And Presentation

You can customise the content and number of xml data islands using the Portal Setting XML Configuration. This setting points to an XML file containing the definition of all data islands, their names and corresponding SQL statements.

The presentation of the HTML file and its data can be customised using the Portal Settings POF Template and RFQ Template.

Below is a sample of a data customisation file:

```
<?xml version="1.0" encoding="UTF-8"?>
<ebusinessdirect>
<amos version="1" author="John Smith" created="20080228" company="CompanyA">
</amos>
<purchaseorder>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</purchaseorder>
<quotation>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</quotation>
</ebusinessdirect>
```

25.5.2 HTML/JSON

Setting the HTMLType definition to HTML/JSON produces an HTML file containing a JSON data island. This requires JavaScript to be enabled within the browser and is supported by most major web browsers, including Microsoft Internet Explorer.

NOTE: When using the HTML/JSON option to generate HTML documents: when the supplier sends the information, the email produced containing the information to be sent back is presented editable to the user filling in the HTML page. No changes should be made to the content of this email, as this would render the information useless.

25.5.2.1 Customisation: Data And Presentation

You can customise the content and number of data islands using the Portal Setting **XML Configuration**. This setting points to an XML file containing the definition of all data islands, their names and corresponding SQL statements.

The presentation of the HTML file and its data can be customised using the Portal Settings **POF Template** and **RFQ Template**.

Below is a sample of a data customisation file:

```
<?xml version="1.0" encoding="UTF-8"?>
<ebusinessdirect>
<amos version="1" author="John Smith" created="20080228" company="CompanyA">
</amos>
<purchaseorder>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</purchaseorder>
<quotation>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
```

```
</sql>
</dataisland>
</quotation>
</ebusinessdirect>
```

25.5.2.2 JSON Library

Processing JSON data requires a JSON library. Several libraries are available on the Internet. For example, one such library may be found at:

http://ajax.googleapis.com/ajax/libs/jquery/1.3.2/jquery.min.js

The selected library must be made available for the HTML file - either by referencing a URL or by including the library directly into the HTML file itself. To specify a library, use the Portal Setting **JSON Library**, which lets AMOS know how the selected library should be linked to the HTML file. There are three values available when defining this setting:

- **INTERNAL** - uses the java script code found internally within AMOS, and inserts it into the HTML file. This increases the size of the HTML file.
- **URL** - links the URL you provide here, into the HTML file; this will not considerably increase the size of the HTML file.
- **FILE** - takes the java script code contained in the selected library file, and inserts it into the HTML file. This increases the size of the HTML file produced according to the size of the selected file. You indicate the location of the library file here. Keep in mind that AMOS does not verify the content of the file - it is inserted as it is.

25.5.3 HTML/No Script

Setting the HTMLType definition to HTML/NoScript produces an HTML file with no data island which therefore do not rquire the web browser to execute any java script. This is supported by most major web browsers, and does not require JavaScript to be enabled within the browser. The resulting HTML file will not be expanded by any data island as in the two previous scenarios. Because this new format does not contain any java script it is also readable on smart phones like Blackberries and iPhones.

For security reasons some users might switch JavaScript functionality off.

NOTE: When using the HTML/NoScript option to generate HTML documents: when the supplier sends the information, the email produced containing the information to be sent back is presented editable to the user filling in the HTML page. No changes should be made to the content of this email, as this would render the information useless.

25.5.3.1 Customisation: Data And Presentation

To produce HTML files of this type, all the necessary data is populated into 'Table Tags'. This tells AMOS where to insert the data in the HTML file. There are two ways to load data into the HTML file.

- Use the portal setting **XML Configuration** in combination with a template file specified in the **POF Template** or **RFQ Template** portal settings. Or,
- Insert AMOS-specific tags into the template file specified in POF Template or RFQ Template with or without the use of the XML Configuration setting. To insert a tag with use of the XML Configuration setting, be sure to define that portal setting, first. Note that AMOS is not case sensitive regarding these tags, but due to HTML standards it is recommended to type 'amostabledata' and 'amoscolumnid' in lower case.

  amostabledata

  This tag identifies the source of the data. Set it to either the same name as defined in the XML Configuration file or, to an SQL select statement.

amoscolumnid

Within the SQL select statement there are one or more columns identified numerically - 1, 2, 3 etc.

The amoscolumnid tag identifies the column number of the SQL select statement already set in the amostabledata tag. If that tag points to a name in the XML Configuration file, look for the SQL select statement in that file. Otherwise, the amostabledata tag is the SQL select statement.

To insert a column in the HTML file, set the amoscolumnid tag to the numerical value of the column in the SQL select statement.

Example: in the following SQL select statement, 'code' is 'amoscolumnid'='1' and 'name' is 'amoscolumnid'='2'.

'SELECT code, name FROM address WHERE code LIKE 'j%'
The order of the presented columns does not need to follow the numerical value of the column ID.

The presentation of the HTML file and its data can be customised using the Portal Settings **POF Template** and **RFQ Template**.

If your HTML file collects data from multiple sources - that is from several SQL select statements - all the table tags must be contained within one main table tag.

25.6 Tamper Control

Some external programs can alter the content of the HTML and XML files produced by AMOS. Sometimes these alterations are incorrect and produce faults at the receiving application. A checksum can be added into the outgoing files so AMOS can check if they have been altered or not.

The portal setting AddCheckSum, when set to TRUE (default) will insert a comment into the file to be used for tamper control. If this setting is FALSE, no comment will be inserted.

To scan files for tampering:

1. In the e-Business Portals window, select a portal record.
2. Go to **Options > Tamper Control**. The Tamper Control dialog opens and displays the Export Directory for the selected portal record and the files in it.
3. Click **Start** to scan all files in the directory. The results may be:

- **OK** - the file(s) contain a checksum and is validated.
- **No CRC** - the file(s) did not contain the checksum. If the portal setting AddCheckSum is set to TRUE, this means the file has been tampered with.
- **Tampered** - the file does contain the checksum and its content has been altered outside AMOS.

AMOS cannot reconstruct a file that has been tampered with. You can choose to delete the file and check the portal flag for the record the file represents.

CHAPTER 26 Transaction Codes

Transaction Codes can connect expenses to a specific budget dimension, such as Responsible or Project. The codes themselves are not directly connected to the budget.

To activate and use Transaction Codes:

1. Define the Transaction Code parameters. See section 26.1.
2. Enter values for the codes in the Transaction Codes register. See section 26.2.
3. These Transaction Codes and their set values will then become available for selection within the system. See section 26.3.

26.1 Transaction Code Parameters

Set the Transaction Code parameters. This is a way of activating them for application in the system. There are ten Transaction Code Levels, for each of which you can define a status and a label:

1. Go to **Tools > Configuration > Parameters**. Click on the Transaction Codes folder to expand it.

2. The list of ten Transaction Code Levels and Labels appear.

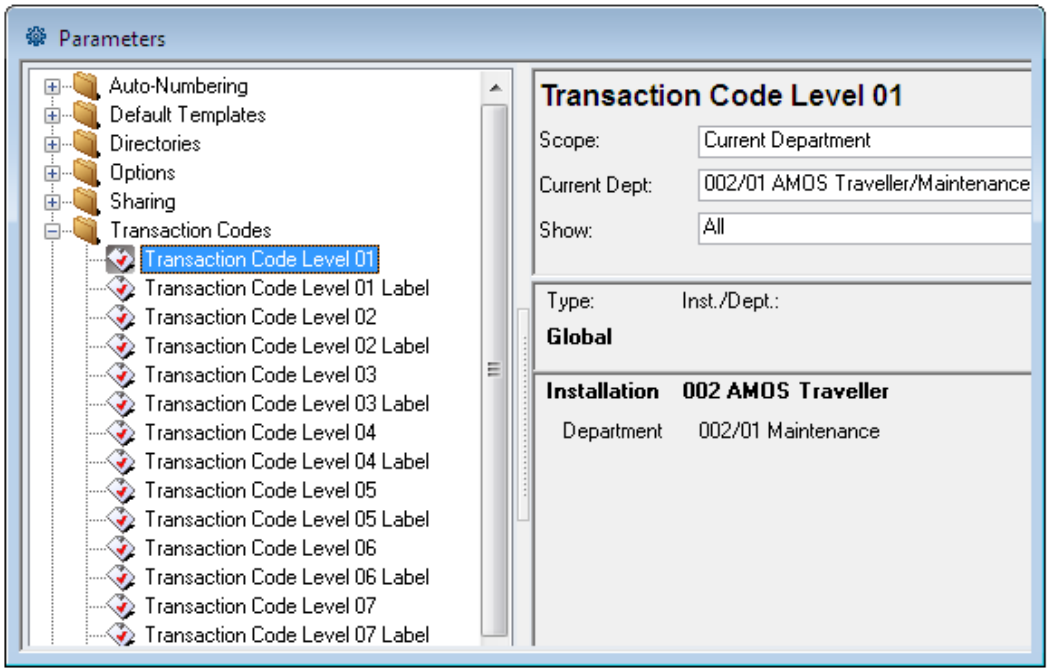


Figure 105 The Transaction Codes Parameters

3. Select a **Level** and use the lookups to assign a status, either globally or by installation/department. There are three possibilities:
   - **Mandatory** - every transaction must have a value for this code
   - **Optional** - up to the user
   - **Not Used** - this code is not in use

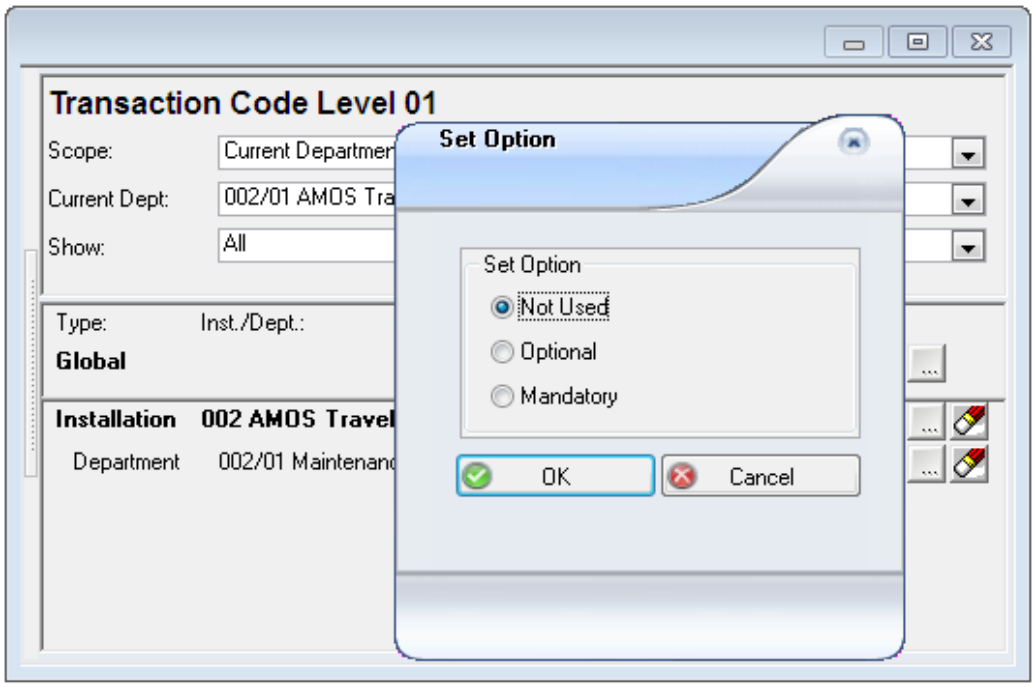


Figure 106 The Dialog Box for Transaction Codes

4. Next, select the **Label** parameter for the same Level. Enter a name to identify the transaction code level by. Codes belonging to this level will be identified with the label you provide. For example, Responsible or Project.
5. **Save** your work before exiting the window.

26.2 Transaction Codes Register

Once the Transaction Code parameters are defined, go to **Tools > Configuration > Stock > Transaction Codes** to create a list of Codes grouped for each label:

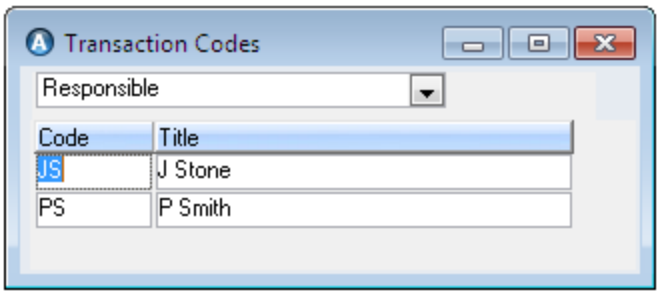


Figure 107 The Transaction Codes Window

1. Select the transaction code label to enter values for from the drop-down list.
2. Click the **New** button to get a blank line.
3. Enter a **Code** and **Title** for the transaction code. For example, select the label Responsible, and enter the initials and names of the people assigned as responsible for various projects.
4. Create as many transaction codes for the selected label as required. These codes will have the status defined for the label in the parameters window.
5. **Save** your work before exiting the window.

26.3 Applying Transaction Codes

Once parameters are set and the code values defined, the transaction codes become available for use throughout the system.

For example, the Components window Options menu contains the item Transaction Codes. Selecting a Component in the list and then choosing **Options > Transaction Codes** opens a new dialog showing the Transaction Code Labels you defined in the Parameters window. Next to each one is a drop-down list, containing the Transaction Code values you defined for each label, in the Transaction Codes register. The codes you select here will then apply by default to subsequent transactions involving this component and the related expenses will be linked to the appropriate budget dimension. So, when a user opens the In/Out of Stock window and takes a part in or out against this component which has default transaction codes applied, those codes will appear in the In/Out of Stock window.

CHAPTER 27 Templates And The Form Designer

Assigning templates to Details tabs and Description windows in AMOS makes it easier for users to add the correct data in a faster and more efficient way: when a template is applied, the user will see a form that may contain drop-down lists, selection boxes, input fields and other controls and so on. Using a template, a Details tab or Description window is given the appearance of a specialised input form - otherwise the tab is simply a blank page for free-entry text.

To create and assign templates in AMOS:

1. Create a basic template record in the Template register. See section 27.4.
2. Create and design a custom form in the Form Designer. See section 27.5.

   You can also use PowerBuilder to design your custom forms.
3. Import the form definition into the Template register. See section 27.6.
4. Convert the basic template into an enhanced template (optional). See section 27.7.

   On enhanced templates only: you can divide the form into sections and customise the access rights to each section. See section 27.7.1 and section 27.7.2.

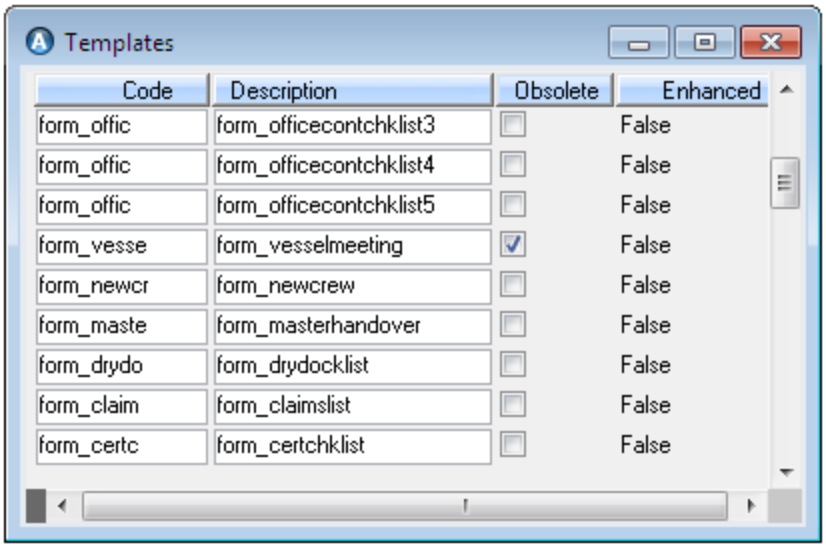
Once templates are ready for use:

- Assign default templates to tabs. See section 27.8.
- Change the template in use when and where it is necessary. See section 27.8.1

27.4 Creating A Basic Template Record

To create a basic template record:

1. Go to **File > Open Register > General > Templates**.
2. Click the **New** button.
3. Enter a **Code** and **Description**.



4. Click **Save**.

To prevent all users from selecting or applying a template, flag the **Obsolete** checkbox.

27.5 Creating A Custom Form

There are two ways to create form definitions:

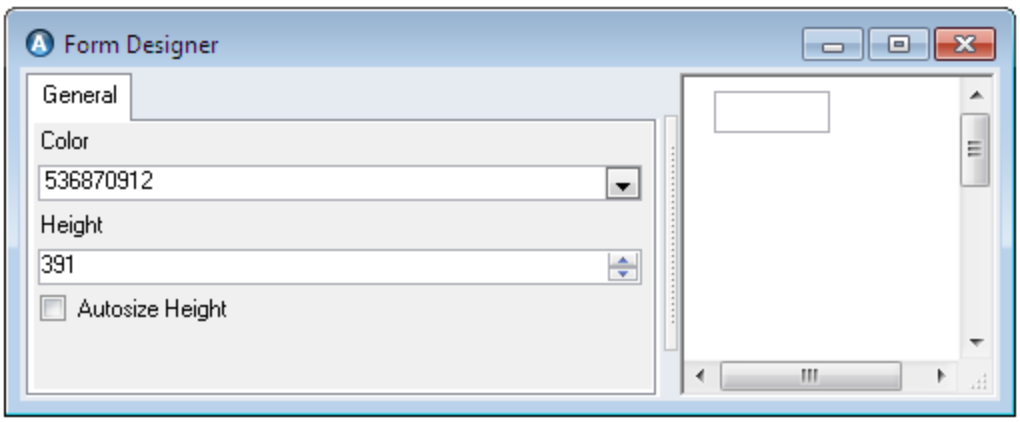
- Using PowerBuilder. Create a form definition (in PowerBuilder terminology this is called a DataWindow), and save it in a PowerBuilder library file with the file extension *.pbl[1].

  See *PowerBuilder* documentation for instructions.

- Using the AMOS Form Designer. Import a datawindow into the Template Register and connect it to a template entry there.This creates a template and the .pbl file is no longer required. Read about the Form Designer here.

Opening a Form in the Form Designer

Go to **File > Open Register > General > Templates > Options > Form Designer**:



The window opens to a new blank form to which you can add columns and objects. Or, to open an existing form, go to **Options > Open Form**. Select a PowerBuilder Library file (*.PBL) to read in an existing template and modify.

[1]The name of the file and the name of the datawindow are optional, though a good practice would be to prefix the object with d_ (for datawindow), for example 'd_mytemplate'.

NOTE: If a form has already been used to input data, do not change it.

Saving a Form

There are two ways to save a form:

- **Options > Save Form** - saves the modifications to the template in the Library file it was originally stored in (in the case of an existing form).
- **Options > Save Form As** - allows you to choose another existing Library file or to create one. After either selecting an existing library file or defining the location and naming a new library file, you register a name for the template with which it will be available in the Library file.

27.5.1 Designing Your Form

Use the **Options > Insert** sub-menu in the Form Designer window to select and insert different objects into your form.

NOTE: The table_id column is always present on every form by default. Do not delete this required field.

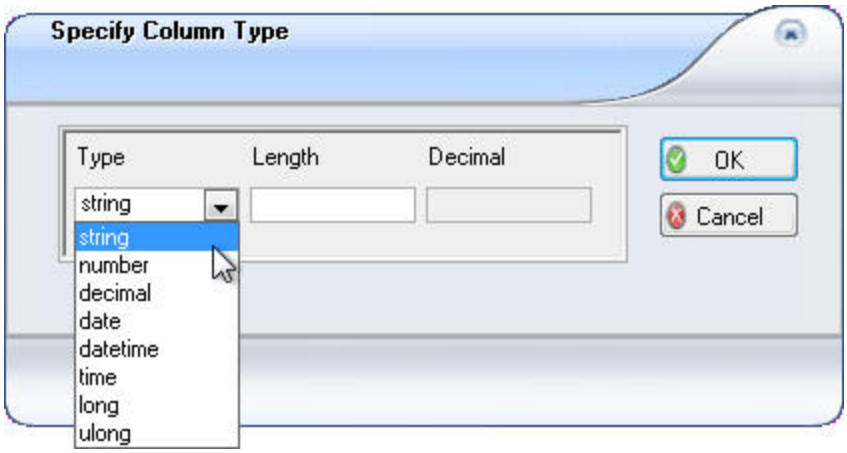
To automatically resize the height of the form according to the content, flag **Autosize Height** in the Position tab.

If you leave the **Moveable** and **Resizeable** boxes in the Position tab flagged, any user can move and resize the selected object on the eventual template.

Adding Columns to a Form

To insert a new column:

1. Go to **Options > Insert > Column**.
2. Choose the **Type**:



3. When you select the field in the form, you see its properties on the left side.

TIP

To change a column definition, double-click on the column or select it and go to **Options > Edit Column Type**.

Do not change the default **Name** that comes with a new column: AMOS will disregard any new name when it creates the table and will use the default name. The first column you add will be called name_1. If you change this and then create a second column, AMOS will call both columns name_1. Two columns with the same name are not allowed, and AMOS will not be able to create the table.

To define a tabbing order[1] for your columns:

1. Go to **Options > Tab Order**.
2. You see a list of all the columns you have added to the template.
3. Enter numbers in the **Tab Order** column.

The table_id column is always present on every form by default. To prevent it appearing on the finished form:

1. Select it.
2. Unflag the **Visible** checkbox on the General tab.
3. Adjust the tab order value for this field to 0.

If you place a free-text column on the form, to add scrollbars:

1. Select the column.
2. Flag the **Auto Horz/Vert Scroll** and **Horz/Vert Scroll Bar** boxes.

To add a field which performs calculations, insert a computed field:

1. Go to **Options > Insert > Computed Field**.
2. Click in the form to add the field; drag and drop it into place.
3. Click the **Compute Expression** lookup.
4. Add column names and operators to retrieve a computed value, and click the **Verify** button to test the expression.
5. Click **OK** to exit the dialog.

27.6 Importing And Connecting A Form Definition

When you have finished designing your template, to use it you must first import it into the Template register from the library file and connect it to a code, thereby creating a usable template.

To connect a form definition to a template code:

1. Go to **File > Open Register > General > Templates.**
2. Either select an existing template record, or create and save a new one.
3. With the template selected, go to **Options > Import Definition**.
4. Click **OK**. Select the .PBL file containing the form definition.
5. Click **Open** to get a list of the form definitions contained in the selected file.
6. Select the definition and click **OK** to import it.

The form will now be available for selection as a template.

[1]The order in which users will move through the fields on the form by pressing the Tab key.

27.7 Converting A Template

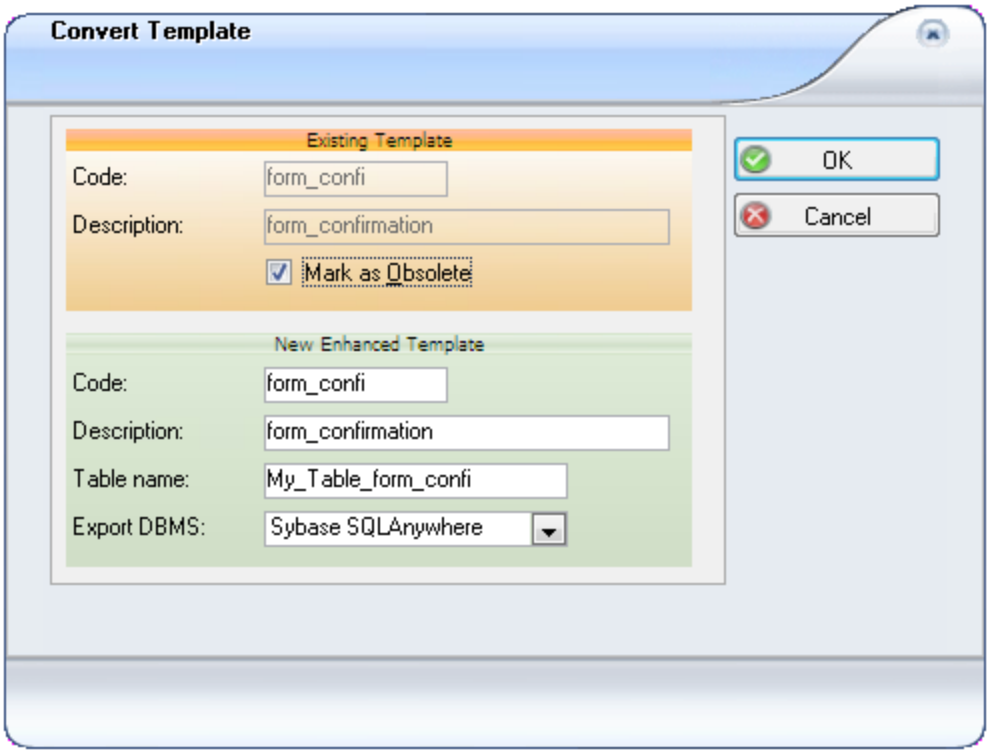
There are two types of templates: Basic and Enhanced. While the two types of templates look the same and show the same data entry fields, enhanced templates create custom tables in the AMOS database upon conversion. Custom tables provide better analysis and trending capabilities than the standard BLOBs which basic templates store all data in.

NOTE: Not all tables support enhanced templates.

Converting a basic template to an enhanced one allows you to limit access to various areas of the form, meaning that only some users will be able to read or edit certain fields.

To convert a template:

1. Go to **File > Open Register > General > Templates**.
2. Select a basic template in the list.
3. Go to **Options > Convert**.
4. To prevent further use of the existing template check the **Mark as Obsolete** box:



5. Change the **Code** in the bottom part of the dialog to preserve uniqueness. You do not have to change the inherited **Description**.
6. Enhanced templates enable the creation of user defined table names used to store the values entered in the form at a later date. Specify a **Table name** for database storage purposes.
7. Specify the **Export DBMS** to be used. This establishes the **Database Platform** used at the receiving installation during export, ensuring that the correct syntax is provided to create the table in that database.
8. Click **OK** to carry out the conversion and a table will be created in the AMOS database

with the Table name you provided.

9. The **Enhanced** column in the Template register will now show 'TRUE'.

NOTE: A check is performed during conversion to determine if the selected template is attached to a register. If this is the case, a warning is displayed and the obsolete checkbox must be unchecked.

NOTE: If AMOS Replication is installed you will be prompted to create a replication rule for all new user defined tables associated with enhanced templates.

27.7.1 Defining Access Rights Sections On Enhanced Templates

When a template is converted to enhanced, the resulting form can be divided into sections. You can use these sections to limit access to the template:

- Allow certain users to edit data in some areas and read only in other areas.
- Prevent some users from reading certain areas entirely.

If access to a section is undefined, any group can edit it.

To create access sections:

1. Go to **File > Open Register > General > Templates**.
2. Go to **Options > Form Designer**.
3. Go to **Options > Open Form**.
4. Select the form to open.
5. Sections are defined by the keyword 'AMOS_SECTION=#' (where # is the section number) in the **Tag** property of each of the fields when designing the form. This defines the section to which each field belongs. Select a column and then type a section definition for that column, into the **Tag** field. For example, AMOS_SECTION=1.
6. Continue to group the columns into sections by defining the section number in the Tag field for each column.
7. Give read and edit access rights on sections for any AMOS user group.
8. Assign access to user groups for each of the section numbers.

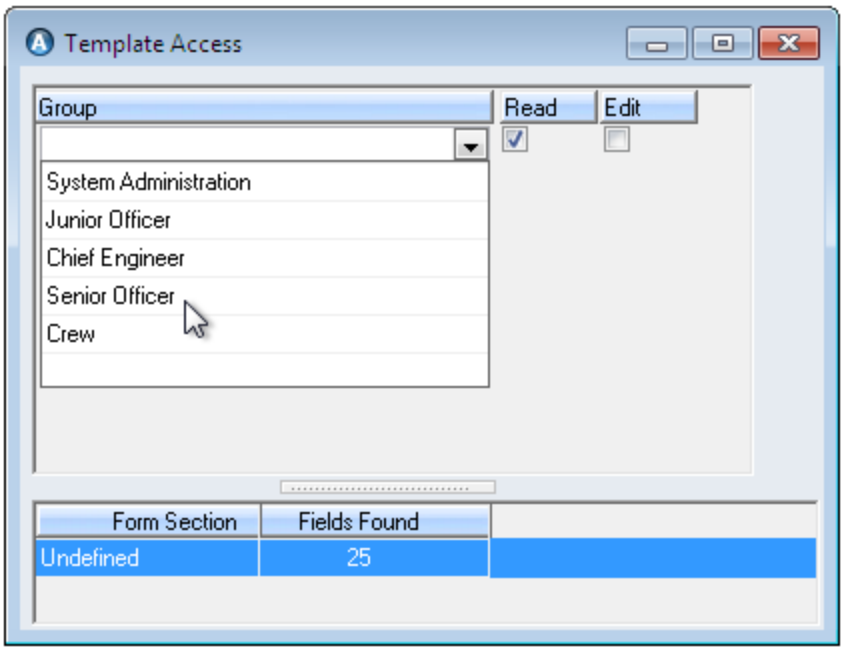
   See section 27.7.2 for more about this step.

27.7.2 Assigning Access Rights To Enhanced Templates

To assign access to sections:

1. Open the Templates register.
2. Select an enhanced template - with access sections already defined - and go to **Options > Access**[1].
3. Select a 'Form Section' in the bottom of the window.
4. Click inside the top of the window, and then click **New** on the toolbar.
5. Select a **Group** who should access this section. Flag the **Read** and/or **Edit** boxes to set access rights:

[1] 'Access' is not available on the Options menu unless the selected template is an enhanced one.



6. Add as many groups as necessary, and then do the same for the next section.
7. **Save** your settings and close the window to return to the Templates register.

Remember, if access to a section remains undefined, any group can edit it.

27.8 Defining A Default Template

You can assign templates to appear automatically in a Details tab/Full Description window for an entire window. Once a default template has been defined for a Details tab, then this template will be displayed in the tab whenever it is opened:

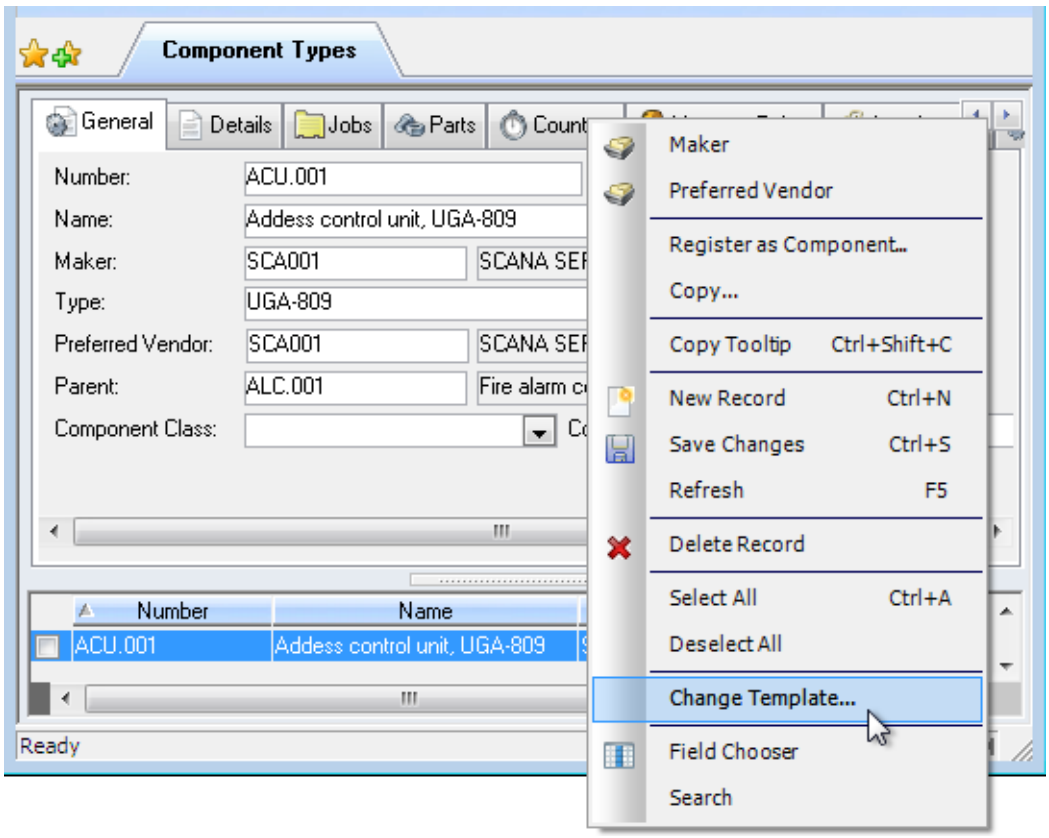
1. Select **Tools > Configuration > Parameters** to open the Parameters window.
2. Expand the Default Templates folder and then click on any table in the list. The following tables will support selection of both basic and enhanced templates as default:
   - Budget Codes
   - Functions
   - History
   - Line Items
   - Noon Reports
   - Order Forms
   - Vouchers
   - Voyages
   - Work Orders
3. Click the lookup button beside the **Global Value** field to open the Select Template box, and select the required template from the list.
4. Click **OK** to select the template and close the box.
5. **Save** the changes.

27.8.1 Assigning Or Changing A Template

Templates are usually attached to Details tabs/Full Description windows via **Edit > Change Template**. However, a template can be attached automatically on creation of a new table entry, by setting a default parameter.

If no template is assigned to a Details tab/Full Description window, or to change the one which is already present:

1. In the appropriate window, select the record for which to change the template for the Details tab.
2. Right-click and select **Change Template** or go to **Edit > Change Template**.



A warning message appears telling you that if you change the template then any information already in that Details tab will be displayed incorrectly.

3. Click **OK** to open the Select Template dialog and change the template or **Cancel** to close the message box and halt the process.
4. **Save** the changes.

CHAPTER 28 Custom Login Screen And Auto Login

28.1 Custom Login

It is possible to customise the Login and About screens to display pre-defined bitmaps. Your licence file needs to be adjusted to support this functionality and it is only activated on a case-by-case basis under a special distribution agreement.

Custom Login and About images can only be changed if the value for SystemType in the license file is >=10.

Option A

The files should be stored in the folder defined as the InstallationDirectory in the parameters. The filenames are logon##.TYP and about##.TYP, where ## is the SystemType as registered in the license file (SystemInfo.SystemType), and TYP is either the extension gif, jpg or bmp (they will be scanned for in that order).

Option B

As the Login and About windows contain some controls such as username and password fields, ok and cancel buttons, and text, there is an additional solution to define the login image and the position of the controls within the window.

The positions are relative to the left top hand corner of the Login and About windows (coordinates 0,0) and the positions of the controls are relative to each other and cannot be influenced.

Register the following in the AMOSW.INI file to use this solution:

[Customisation]

LoginControl_x=

LoginControl_y=

LoginPicture=

AboutControl_x=

AboutControl_y=

AboutPicture=

Where LoginControl_x, LoginControl_y, AboutControl_x and AboutControl_y define the coordinates to place the controls in the respective windows. The LoginPicture and AboutPicture parameters allow you to define the folder and name of the image for use in the Login and About windows.

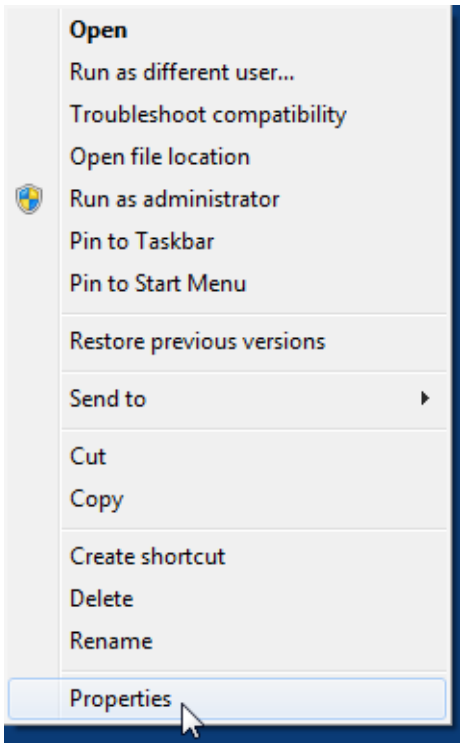
28.2 Auto Login

It is possible to pass a login ID and password as parameters on startup of AMOS Business Suite, thereby logging on 'automatically' and preventing that user from having to enter their user name and password each time they start the application.

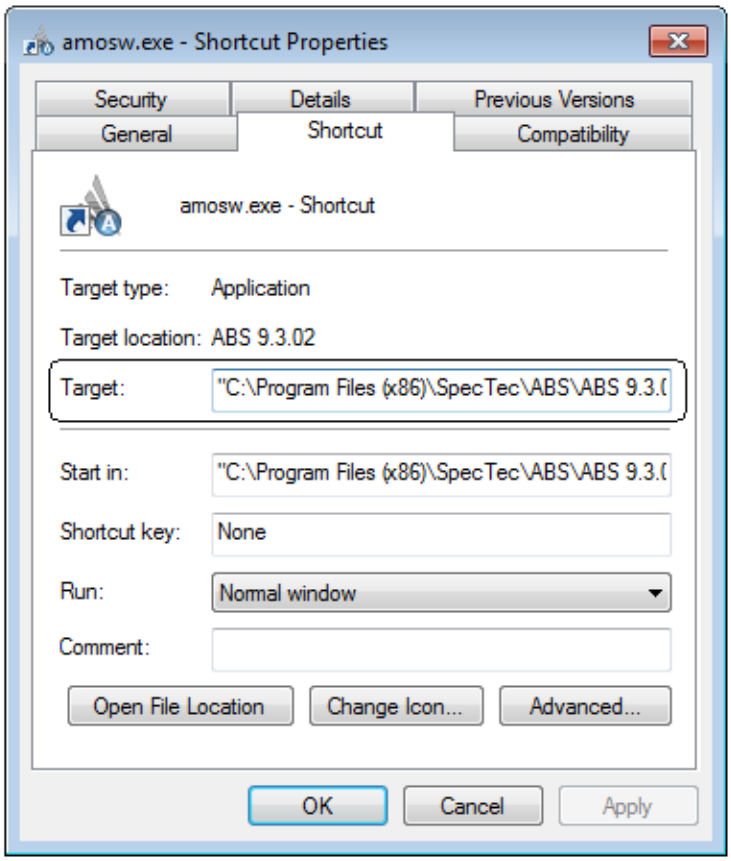
1. Right-click on the AMOS Business Suite shortcut icon on the desktop:



2. Select Properties from the popup menu:



3. Notice the **Target** field on the Properties dialog Shortcut tab:



   It contains the path to the amosw.exe file. For example:

   "C:\Program Files (x86)\SpecTec\ABS\ABS 9.3.02\amosw.exe"

4. Assume for this example the user name is sysop and their password is abcde. Add the following:

   -user=sysop -password=abcde -autologin=true

   Now the text in the **Target** field looks like this:

   "C:\Program Files (x86) \SpecTec\ABS\ABS 9.3.02\amosw.exe" - user=sysop -password=abcde -autologin=true

5. Click **OK** to exit the dialog.

While autologin=true, double-clicking the icon opens AMOS directly without presenting the login screen. If it is set to false, the logon screen is presented first but with the **Login ID** and **Password** fields already filled in.

APPENDIX A AMOS Internal Work Flow Actions

When a Work Flow transformation is performed, a new record is added to the table WorkFlowLog, filling the following columns:

Transformed. From WorkFlowTransform.

TransComment. The user's comment added in the Work Flow dialog.

ObjectId. Key column value for a work flow object, i.e. OrderId, WorkOrderId, etc.

DeptId. The object's department ID.

For each standard action that a transformation performs, a new record is added to the table WorkFlowStdLog, filling the following columns:

TransStdActionId. From WorkFlowStdAction.

DeptId. The object's department ID.

When a user selects another user from the 'Assign To' list in a Work Flow dialog window, an entry in the table WorkFlowMailbox is updated or created with the column 'ToUser' set to the selected user ID.

Refer to the tables below for a complete list of AMOS Internal Work Flow Actions and an explanation of what each action does, organised by module.

Module/ID/Table - Maintenance/2/WorkOrder	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:' on the Work Flow dialog window.
Cancel	Set 'wostatus' to 4 = Cancelled
Change Work Permits Status	Update or create an entry in table WoWorkPermit with given 'Issue To' ID.
Complete	Set 'wostatus' to 7 = Completed
Control	If 'wostatus' = 4 (cancelled) or 7 (completed), set 'wostatus' to 8 = Controlled. Set 'filed' to 1 if: 'woorigin' = 1 (Requisition/General); or 2 (Period); or 4 (CBM); or 6 (Round); or 7 (Corrective Action); and, corresponding AutoFileControlled parameter is set to TRUE.
Create Order Form	Creates entry in tables OrderForm and OrderLine, with relevant workorderid.
File	Set 'filed' =1
Issue	Set 'wostatus' to 6 = Issued. Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Issue Print	None.
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = orderid and moduleid = 2 (Maintenance). Set column 'Locked' = 1.
Plan	Set 'wostatus' to 2 = Planned Set 'plannedby' = <current AMOS user>
Postpone	Set 'wostatus' to 3 = Postponed
Report	Open the Report Work window and create an entry in table MaintenanceLog.
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Requested	Set 'wostatus' to 1 = Requested
Set to Pending	Set 'wostatus' to 5 = Pending
Unfile	Set 'filed' = 0
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = workorderid and moduleid = 2 (Maintenance). Set column 'Locked' = 0.

Module/ID/Table - Purchase/1/OrderForm	
System Action	**Action Performed by System Action**
Activate	Set 'formstatus' to 1=Active
Approve Purchase Order	Set 'approvedby' = <current AMOS user> Set 'approveddate' = <current date>
Approve Requisition	Set 'reqnapprovedby' = <current AMOS user> Set 'reqnapproveddate' = <current date>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'formstatus' to 5 = Cancelled
Convert to Purchase Order	Set 'formtype' to 1 = Purchase Order
Convert to Query	Set 'formtype' to 3 = Query
Convert to Requisition	Set 'formtype' to 2 = Requisition
File	Set 'formstatus' to 3 = Filed
File Full Received	None
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = orderid and moduleid = 1 (Purchase). Set column 'Locked' = 1.
Park	Set 'formstatus' to 2 = Parked
Print	Print
Receive	Set 'receiveddate' = <date set by user>
Revoke Approval From Purchase Order	Set 'approvedby' = null Set 'approveddate' = null
Revoke Approval From Requisition	Set 'reqnapprovedby' = null Set 'reqnapproveddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = orderid and moduleid = 1 (Purchase) . Set column 'Locked' = 0

Module/ID/Table - QuotationCompareScen/18/QuotationCompareScenario	
System Action	**Action Performed by System Action**
Approve	Set 'approvedby' = <current AMOS user> Set 'approveddate' = <current date>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = quotationcomparescenarioid and moduleid = 18 (Quotation Compare Scenario). Set column 'Locked' = 1
Propose	Set 'proposedby' = <current AMOS user< Set 'proposeddate' = <current date>
Revert	Set 'prosposedby' = null Set 'proposeddate' = null
Revoke	Set 'approvedby' = null Set 'approveddate' = null
Select	Set 'selectedby' = <current AMOS user> Set 'selecteddate' = <current date>
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = quotationcomparescenarioid and moduleid = 18 (Quotation Compare Scenario). Set column 'Locked' = 0
Unselect	Set 'selectedby' = null Set 'selecteddate' = null

Module/ID/Table - Custom Clearance/12/CustomClearanceForm	
System Action	**Action Performed by System Action**
Arrive Custom	Arrived at Customs. Set 'customarriveddate' = today
Arrive Freezone	Arrived at free zone. Set 'freezonearriveddate' = today
Custom Clearance	Cleared at Customs. Open the Obtain Custom Clearance Declaration window and store the 'declarationno', 'declarationdate', 'airwaybill', 'billoflading', 'invoiceno' and 'currencycode' as user specifies, in table 'CustomClearanceForm'.
File	File the record. Set column 'Filed' = 1
Finalise	Record is finalised. Set 'status' to 3 = Finalised Set 'finaliseddate' = today
Issued	Record is issued (accepted) by EGPC . Set 'status' to 2 = Issued Set 'processeddate' = today
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = customclearanceformid and moduleid = 12 (Custom Clearance). Set column 'Locked' = 1
Rejected	Record is rejected by EGPC. Set 'processeddate' = today
Send SMS	Send SMS to user
Submit	Record is submitted to EGPC. Set 'submitteddate' = today
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = customclearanceformid and moduleid = 12 (Custom Clearance. Set column 'Locked' = 0

Module/ID/Table - Voucher/13/Voucher	
System Action	**Action Performed by System Action**
Activate	Set 'cancelledby' = null Set 'cancelleddate' = null
Approve	Set 'paymentapprovedby' = <current AMOS user> Set 'paymentapproveddate' = <current date>
Assign	None
Cancel	Set 'cancelledby' = <current AMOS user> Set 'cancelleddate' = <current date>
File	Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = voucherid and moduleid = 13 (Voucher). Set column 'Locked' = 1
Revoke	Set 'paymentapprovedby' = null Set 'paymentapproveddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unfile	Set 'filedby' = null Set 'fileddate' = null
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = voucherid and moduleid = 13 (Voucher). Set column 'Locked' = 0

Module/ID/Table - SA Configuration/10/TmsaConfiguration	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
File	Set 'configstatus' to 3 = Filed
Issue	Set 'configstatus' to 2 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Lock	Lock the record for further editing. Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/ID/Table - Self Assessment/11/TmsaAssessment	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
File	Set 'assessmentstatus' to 3 = Filed
Issue	Set 'assessmentstatus' to 2 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Lock	Lock the record for further editing. Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/ID/Table - RiskMgmtAssessment/17/RmAssessment	
System Action	**Action Performed by System Action**
Assess	Set 'status' to 2 = Assessed Set 'assessedby' = <current AMOS user> Set 'assesseddate' = <today>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'status' to 4 = Cancelled Set 'cancelledby' = <current AMOS user> Set 'cancelleddate' = <current date>
File	Set 'status' to 3 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmassessmentid and moduleid = 16 (Risk Management Assessment). Set column 'Locked' = 1
Review	Set 'status' to 1 = Reveiw
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectlocked where objectid = rmassessmentid and moduleid = 17 (Risk Management Assessment). Set column 'Locked' = 0

Module/ID/Table - RiskMgmtMatrix/14/RmMatrix	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
File	Set 'status' to 2 = Filed Set 'filedby' = <current amos user> Set 'fileddate' = <today>
Issue	Set 'status' to 2 = Active Set 'issuedby' = <current amos user> Set 'issueddate' = <today>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmmatrixid and moduleid = 14 (Risk Management Matrix). Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = rmmatrixid and moduleid = 14 (Risk Management Matrix). Set column 'Locked' = 0

Module/ID/Table - RiskMgmtScenario/16/RmScenario	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'status' to 3 = Cancelled Set 'cancelledby' = <current AMOS user> Set 'cancelleddate' = <current date>
File	Set 'status' to 2 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Issue	Set 'status' to 1 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date> If the scenario has status = 1 (Issued) and oldrmscenarioid has a value then: Set 'status' to 2 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmscenarioid and moduleid = 16 (Risk Management Scenario) . Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = rmscenarioid and moduleid = 16 (Risk Management Scenario). Set column 'Locked' = 0

Module/ID/Table - RiskMgmtScenarioType/15/RmScenarioType	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'status' to 3 = Cancelled Set 'cancelledby' = <current amos user> Set 'cancelleddate' = <today>
File	Set 'status' to 2 = Filed Set 'filedby' = <current amos user> Set 'fileddate' = <today>
Issue	Set 'status' to 1 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date> If the scenario type has status = 1 (Issued) and oldrmscenariotypeid has a value then: Set 'status' to 2 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmscenariotypeid and moduleid = 15 (Risk Management Scenario Type). Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = rmmatrixid and moduleid = 15 (Risk Management Scenario Type). Set column 'Locked' = 0

Module/Table - Procedures/ProcedureVersion	
System Action	**Action Performed by System Action**
Approve	Set 'approvedby' = <current AMOS user> Set 'approveddate' = <current date>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Set column 'Locked' = 1. Set 'proceduredocver.status' = 1.
Publishing	Set 'status' to 2 = Published
Revoke Approval	Set 'approvedby' = null Set 'approveddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0. Set 'proceduredocver.status' = 1.

Module/Table - Circulars/ProcedureVersion	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Set column 'Locked' = 1
Publish	Set 'status' to 2 = Published
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Obsolete	Set 'status' to 3 = Obsolete
Set to Draft	Set 'status' to 2 = Draft
Unlock	Enable editing on record by removing lock. Set 'procedureversion.locked' = 0.

Module/Table - Non Conformities/NonConformity	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/Table - Incidents/Accident	
System Action	**Action Peformed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Close	Set 'closedby' = <current AMOS user> Set 'closeddate' = <current date>
Lock	Lock the record for further editing. Set column 'Locked' = 1
Reopen	Set 'closedby' = null Set 'closeddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

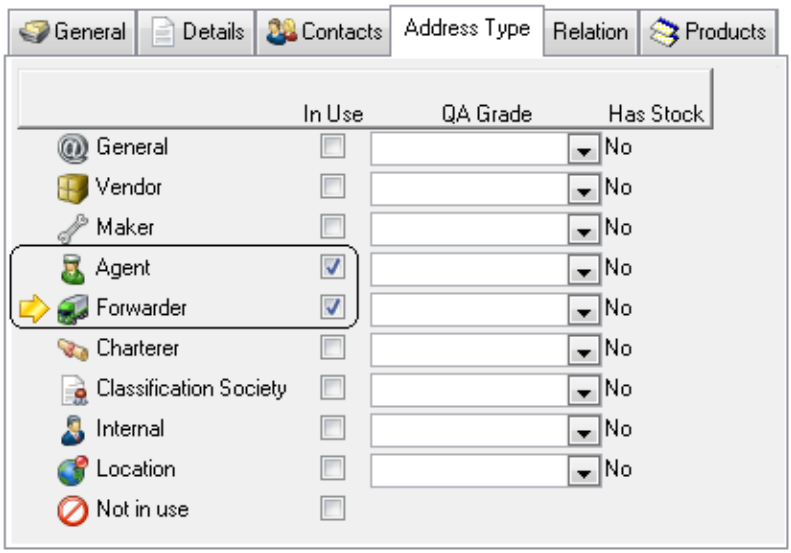
Module/Table - Manuals/Manual	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Publish	Set 'status' to 2 = Published
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set to Draft	Set 'status' to 1 = Draft
Set to Obsolete	Set 'status' to 3 = Obsolete

Module/Table - Claims/Claim	
System Action	**Action Performed by System Action**
Activate	Set 'claimstatus' to 1 = Active
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Close	Set 'claimstatus' to 4 = Closed
Park	Set 'claimstatus' to 3 = Parked
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Pending	Set 'claimstatus' to 2 = Pending

Module/Table - Quality Work Orders/WorkOrder	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'wostatus' to 4 = Cancelled
Change Work Permits Status	Update or create an entry in table WoWorkPermit with given 'Issue To' ID.
Complete	Set 'wostatus' to 7 = Completed
Control	If 'wostatus' = 4 (cancelled) or 7 (completed), set 'wostatus' to 8 = Controlled. Set 'filed' to 1 if: 'woorigin' = 1 (Requisition/General); or 2 (Period); or 4 (CBM); or 6 (Round); or 7 (Corrective Action); and, corresponding AutoFileControlled parameter is set to TRUE.
File	Set 'filed' = 1
Issue	Set 'wostatus' to 6 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Issue Print	None
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = orderid and moduleid = 2 (Maintenance). Set column 'Locked' = 1
Plan	Set 'wostatus' to 2 = Planned Set 'plannedby' = <current AMOS user>
Postpone	Set 'wostatus' to 3 = Postponed
Report	Open Report Work window and create entry in table maintenancelog.
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Requested	Set 'wostatus' to 1 = Requested
Set to Pending	Set 'wostatus' to 5 = Pending
Unfile	Set 'filed' = 0
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = workorderid and moduleid = 2 (Maintenance) . Set column 'Locked' = 0

APPENDIX B Address Type Lookup Limitations

Your Address register probably contains a lot of different kinds of addresses: vendors, makers, agents, classification societies, etc. In the Address Type tab you can select one or more 'Types' for each registered address, by flagging the **In Use** box next to any which apply:



Setting one or more types on an address limits its availability for selection in the system: for example an address marked as type 'Maker' would not be available for selection from a 'Vendor' address lookup list. Keep in mind:

- Flagging one or more types for an address restricts its availability to lookups in the relevant areas.
- Flagging type 'General' makes an address available system-wide. Flagging several types including General means the address will be available system-wide.
- If no types are flagged, the address will be available system-wide.
- Flagging 'Not in Use' removes the address from selection and use throughout the system. This cannot be flagged without unflagging any other selected types first.

The following table shows a list of lookup fields within AMOS and the valid address types each one will display:

Menu	[Tab]/Field	Address Type
File > Open Register > Employees	Address	Internal only
File > Open Register > Vessel Details	[Log] Classification Society	Classification only
File > Open Register > Vessel Details	[Log] Owner	Internal only
Maintenance > Component Types	[General] Maker	Maker only
Maintenance > Component Types	[General] Preferred Vendor	Vendor only
Maintenance > Component Types Hierarchy	[General] Maker	Maker only
Maintenance > Component Types Hierarchy	[General] Preferred Vendor	Vendor only
Maintenance > Components	[General] Maker	Maker only - only applies when Component Types are not in use
Maintenance > Components	[General] Vendor	Vendor only
Maintenance > Components Hierarchy	[General] Maker	Maker only - only applies when Component Types are not in use
Maintenance > Components Hierarchy	[General] Vendor	Vendor only
Maintenance > Function Hierarchy	[General] Maker	Maker only - only applies when Component Types are not in use
Maintenance > Function Hierarchy	[General] Vendor	Vendor only
Maintenance > Work Orders	[General] UDF Address	any; no restriction, skips Not in Use addresses
Maintenance > Projects	[General] UDF Address	any; no restriction, skips Not in Use addresses
Stock > Stock Types	[General] Maker	Maker only
Stock > Stock Types	[General] Preferred Vendor	Vendor only
Stock > Stock Types	[Vendors] Vendor	Vendor only
Stock > Stock Type Hierarchy	[General] Maker	Maker only
Stock > Stock Type Hierarchy	[General] Preferred Vendor	Vendor only
Stock > Stock Items	[General] Maker	Maker only - only applies when Stock Types are not in use

Menu	[Tab]/Field	Address Type
Stock > Stock Items	[General] Preferred Vendor	Vendor only - only applies when Stock Types are not in use
Stock > Stock Items	[Vendors] Vendor	Vendor only - only applies when Stock Types are not in use
Purchase > Forms	[General] Vendor	Vendor only
Purchase > Forms	[General] Delivery Address	any; no restriction, skips Not in Use addresses
Purchase > Forms	[General] UDF Address	any; no restriction, skips Not in Use addresses
Purchase > Forms > Options > Line Items > Options > Split	Vendor	Vendor only
Purchase > Forms > Options > Quotations	Vendor	Vendor only
Purchase > Forms > Options > Deliveries	Forwarder	Forwarder only
Purchase > Forms > Options > Deliveries	Destination	any; no restriction, skips Not in Use addresses
Purcahse > Transport Documents	Forwarder	Forwarder only
Purchase > Transport Documents	Destination	any; no restriction, skips Not in Use addresses
Purchase > Contracts	[General] Vendor	Vendor only
Purchase > Custom Clearance Contract	[General] Contractual Partner	any; no restriction, skips Not in Use addresses
Quality > Emergency Response System	Address	any; no restriction, skips Not in Use addresses
Voyage > Cargoes	[Cargo] Charterer	Charterer only

APPENDIX C Access Control Listings

The following tables list all the access settings available in the Access Control window Registers, Fields, Functions, and Reports/Modules tabs. The settings are listed in the same order as they appear in AMOS.

Registers

Contains an alphabetical list (separated by module) of all registers in AMOS Business Suite.

NOTE: The access controls in this section control visibility of and access to the main window(s) listed for each one. All tabs and sections within the window or subsequent dialogs opened from the main window are covered by the same access control unless an overriding exception (on a field or function, for example) is present. Such exceptions have their own access controls and are included in the appropriate section of this document.

Registers - Common

Account Code Categories	
Table	AccountCodeCategory
Path	Tools > Configuration > Account Code Categories
Description	A list of account code categories and their types - 'generic', 'balance' or 'class of cost'.
Account Codes	
Table	AccountCode
Path	File > Open Register > General > Account Codes
Description	A list of all account codes and their relationship to major account code categories.

Account Transactions	
Table	AccountLog
Path	Tools > Account Transactions
Description	A list of all account transactions.
Additional Cost	
Table	AdditionalCost
Path	File > Open Register > General > Additional Cost
Description	A list of additional costs to include on purchase forms and charge to budgets, such as Agency Fees, Shipping, Insurance, etc.
Address Category	
Table	AddressCategory
Path	File > Open Register > Address > Address Category
Description	Lists categories for use in the main Addresses register.
Address Grouping	
Table	AddressGrouping
Path	File > Open Register > Address > Address Grouping
Description	Lists groupings for use in the main Addresses register.
Address Relation Type	
Table	AddressRelationType
Path	File > Open Register > Address > Address Relation Types
Description	Lists of 'relation types' for relating various addresses in the main Address register.
Address Type Spare Type QA Grading	
Table	AddressStockTypeQAGrade
Path	File > Open Register > Addresses > Address Type *tab* > View Stock *button* >
Description	For adding a list of stock types to a selected address by type, and applying a QA grade to each listed stock type.
Addresses	
Table	Address
Path	File > Open Register > Addresses
Description	Lists addresses for vendors, deliveries, employees, etc.
Alert Configurations	
Table	AlertsConfigurations
Path	Tools > Configuration > Dashboard Alerts
Description	A list of alert groups and the alerts each group contains, and the access rights for each group.

Approval Limits	
Table	ApprovalLimit
Path	Tools > Configuration > Approval Limits
Description	A global table listing all monetary values for purchase approvals. Usually reserved to system administrators.
Attachment References	
Table	Images
Path	File > Open Register > Attachment > References
Description	Lists references to files (.jpegs, bmps, pdfs, etc.) used as attachments in various registers throughout the system.
Attachment Sources	
Table	Books
Path	File > Open Register > Attachment > Sources
Description	Lists source programs for viewing files in different formats.
Audit Trail Configuration	
Table	AuditTrailConfiguration
Path	Tools > Configuration > Audit Trail Configuration
Description	Specifies lists of tables and columns to audit as well as who can view the resulting audit trail in the Audit Trail Log window (Tools > Audit Trail Log).
Audit Trail Reason	
Table	AuditTrailReason
Path	File > Open Register > General > Audit Trail Reason
Description	Lists predefined reasons to apply to audit trail configurations for selection when changing audited fields.
Company	
Table	InstCompany
Path	Tools > Configuration > Company
Description	A list of registered companies.
Cost Centre Accounts	
Table	CostCentreAccount
Path	Tools > Configuration > Cost Centres > Options > Accounts
Description	A list of all account codes tied to individual cost centres and their corresponding budget code defintions.
Cost Centres	
Table	CostCentre
Path	Tools > Configuration > Cost Centres
Description	A list of all cost centres.

Currency Codes	
Table	Currency
Path	File > Open Register > General > Currency Codes
Description	A global table listing all currencies in use throughout the organisation.
Currency Rates	
Table	CurrencyRate
Path	File > Open Register > Currency Rates
Description	A global table listing the conversion rates for all currencies.
Disciplines	
Table	Discipline
Path	File > Open Register > General > Disciplines
Description	Contains a list of disciplines for assigning work.
Employees	
Table	Employee
Path	File > Open Register > Employees
Description	A list of individual employees used for reporting work, and also in the Personnel system.
Export Log	
Table	ImportExportLog
Path	File > Export/Import > Export Log
Description	Logs all files transferred from the site.
Field Access	
Table	SysModulesFieldAccess
Path	Tools > Configuration > Access Control > Field Access
Description	Lists user-defined field access and descriptions.
Geographical Data	
Tables	WorldRegion; CountryList; Port; VMMSDBerthCodeList; VMMSDBerthList;
Paths	File > Open Register > General > World Regions/Countries/Ports/Berth Type File > Open Register > General > Ports > Options > Berth Management
Description	Lists of world regions; countries; ports; berths - visited or used by company vessels.
Groups	
Table	AmosSysGroups
Path	Tools > Configuration > Access Control > Groups
Description	A global table listing all access user groups and group access rights. Usually reserved to system administrators.

Import Log	
Table	ImportExportLog
Path	File > Export/Import > Import Log
Description	Logs all files transferred to the site.
Installations/Departments	
Table	InstallationDepartment
Path	Tools > Configuration > Installations > Installations/Departments
Description	A global table listing all installations or sites and the departments registered to them. Usually reserved to system administrators.
Job Classes	
Table	JobClass
Path	File > Open Register > General > Job Classes
Description	Lists job classes.
Job Descriptions	
Table	JobDescription/JobDescriptionRevision
Path	File > Open Register > Maintenance > Job Descriptions
Description	Contains descriptions for all jobs.
Job Triggers	
Table	JobTrigger
Path	File > Open Register > General > Job Triggers
Description	Contains descriptions of all job triggers used for generating both Maintenance and Quality work orders.
Locations	
Table	Location
Path	File > Open Register > Locations
Description	Lists all locations used for components and stock items.
Login Audit	
Table	LoginAudit
Path	Tools > View Log In Audit Log
Description	A global table listing all users who logged into AMOS at the current site.
Maintenance Classes	
Table	MaintClass
Path	File > Open Register > Maintenance > Classes
Description	Lists classifications for maintenance work.

Maintenance Criteria	
Table	JobCondition
Path	File > Open Register > Maintenance > Criteria
Description	Lists criteria for performing maintenance work.
Mandatory Fields	
Table	MandatoryField
Path	Tools > Configuration > Mandatory Fields
Description	Specifies any fields which the user is required to fill out when creating order forms, work orders, components and other data; also contains the associated error messages to be presented if the data is lacking.
Modules Menu	
Table	SysModules
Path	Tools > Configuration > Extension Features > Modules Menu
Description	Lists links to external programs or user-defined PowerBuilder modules.
Notification Configuration	
Table	NotificationConfiguration
Path	Tools > Configuration > Notification > Notification Configuration
Description	For configuring mobile devices to send SMS messages from AMOS.
Number Series	
Table	NumberSeries
Path	Tools > Configuration > Number Series
Description	A global table listing number series configured for these tables: Account Transactions; Address; Circular; Claim; Component; Component Type; Contract; Form; Incident; Non- Conformity; Project; Project Job; Purchase Order; Query; Requisition Form; Stock Transaction; Stock Type/Item; Transfer Document; TransportDocument; Voucher; Voyage; Work Order Usually reserved to system administrators.
Overview Panels Configuration	
Table	OverviewPanelConfiguration
Path	Tools > Configuration > Overview Panels Configuration
Description	Controls the configuration of the overview panels and who is allowed to access them.
Permits to Work	
Table	WorkPermit
Path	File > Open Register > Permits to Work
Description	Lists any permits which might be required on individual jobs or work orders prior to allowing work to begin.

Price Classes	
Table	PriceClass
Path	File > Open Register > Stock > Price Classes
Description	Contains formulae for different price classes, used to adjust stock items' values.
Printers Tasks	
Table	SysPrinter
Path	Tools > Configuration > Printer Tasks
Description	Describes special tasks used to print labels and other custom reports.
Product Types	
Table	ProductType
Path	File > Open Register > General > Product Types
Description	Lists the products registered vendors supply. Facilitates searching the Address table.
QA Grades	
Table	QAGrading
Path	File > Open Register > General > QA Grades
Description	Contains a list of grades for rating vendors.
Quality Codes	
Table	QualityCode
Path	File > Open Register > General > Quality Codes
Description	Lists all codes used to record any problems with delivered stock items.
Quality Resolution Code Window	
Table	QualityResolutionCode
Path	File > Open Register > General > Quality Resolution Codes
Description	Lists predefined resolution codes which will be available for selection on closing a claim. Resolutions listed here can be applied to quality codes in the Quality Codes register.
Receipt Status	
Table	ReceiptStatus
Path	File > Open Register > Purchase > Receipt Status
Description	A little-used table containing a list of terms to specify status on individual order lines.
Reports Menu	
Table	SysWindows
Path	Tools > Configuration > Extension Features > Reports Menu
Description	Lists user-defined reports.

Tasks	
Table	ImportExportSchedule
Path	File > Export/Import > Tasks
Description	A global table containing all the import, export and generic tasks.
Templates	
Table	Layout
Path	File > Open Register > General > Templates
Description	Contains a list of customised forms which can be attached to individual data registers to replace the standard blank full-page Details page.
Transaction Codes	
Table	TransCode
Path	Tools > Configuration > Transaction Codes
Description	Lists codes used to connect expenses to a budget's specific sub-set.
Translation	
Table	AmosBabel
Path	Tools > Utilities > Translation
Description	The internal tool for translating text in AMOS.
Units	
Table	Unit
Path	File > Open Register > General > Units
Description	Lists units defined for use with stock and purchase transactions.
Users	
Table	AmosUser
Path	Tools > Configuration > Access Control > Users
Description	A global table listing all AMOS users. Usually reserved to system administrators.
Users Mailbox Access	
Table	WorkFlowMailboxAccess
Path	Tools > Configuration > Users > Options > Mailbox Access
Description	Ties work flow mailboxes to the users who can see into the mailbox. Usually reserved to system administrators.
Vessels	
Table	VesselDetails
Path	File > Open Register > Vessel Details
Description	Contains the basic details of each vessel, such as its name, dimensions, tonnage etc.

Work Flow Configuration	
Table	WorkFlowConfig
Path	Tools > Configuration > Work Flow
Description	For configuration of customised work flows for these modules: Circulars; Claims; Custom Clearance; Incidents; Maintenance; Manuals; Non Conformities; Procedures; Purchase; Quality Work Orders; QuotationCompareScen; RiskMgmtAssessment; RiskMgmtMatrix; RiskMgmtScenario; RiskMgmtScenarioType; SA Configuration; Self Assessment; Voucher Usually reserved to system administrators.
Work Orders	
Table	WorkOrder; QWorkOrder
Path	Maintenance > Work Orders Quality > Work Orders
Description	Lists all maintenance/quality work orders.

Registers - Maintenance

CBM References	
Table	CBMTable
Path	Tools > Configuration > CBM References
Description	Lists reference points for condition-based maintenance entries.
Component Classes	
Table	ComponentClass
Path	File > Open Register > Maintenance > Component Classes
Description	Lists classifications for component types.
Component Types	
Tables	ComponentTypeTab; ComponentTypeHierarchy
Paths	Maintenance > Component Types/Component Types Hierarchy
Description	Lists all component types.
Components	
Tables	ComponentTab; ComponentHierarchy
Paths	Maintenance > Components/Component Hierarchy
Description	Lists all components.
Components; Job Descriptions	
Description	Controls access to the Job Specific Details tab on the Component Jobs window.

Components; Measure Points	
Path	Maintenance > Components > Measure Points *tab*
Description	Lists measure points attached to components.
Counter and Measure Point Types	
Table	CounterType
Path	File > Open Register > General > Counter and Measure Point Types
Description	Lists counters like Hours, RPM, etc., and measure points like Pressure, Temperature, etc., which are in use throughout the organisation.
Criticality Levels	
Tables	Criticality; CriticalityIndicator
Paths	File > Open Register > Maintenance > Function Criticality/Function Criticality Indicator
Description	Lists criticality codes and criticality indicators for assigning on functions.
Failure Descriptors	
Table	FailureDescription
Path	File > Open Register > Maintenance > Failure Descriptors
Description	Lists functions affected by a failure and the related severity.
Failure Detection Methods	
Table	FailureDetectionsMethod
Path	File > Open Register > Maintenance > Failure Detection Methods
Description	Lists descriptions of types of failures.
Failure Effects	
Table	FailureEffect
Path	File > Open Register > Maintenance > Failure Effects
Description	Lists the possible effects of failures.
Failure Modes	
Table	FailureMode
Path	File > Open Register > Maintenance > Failure Modes
Description	Lists how failures can occur.
Failure Severity	
Table	FailureSeverity
Path	File > Open Register > Maintenance > Failure Severity
Description	List of a range of failure severities.

Function Counters	
Table	FunctionCounter
Path	Maintenance > Function/Function Hierarchy > Options > Counters
Description	Lists counter readings for functions.
Functions	
Table	Functions
Path	Maintenance > Functions/Function Hierarchy
Description	Lists all functions.
History	
Tables	History; HistoryArchive
Paths	Maintenance > History; Maintenance > Log > Options > History; Maintenance > Components/Component Hierarchy/Function Hierarchy > Options > Archive > History; Maintenance > Components/Component Hierarchy/Function Hierarchy > Options > Archive > Maintenance Log > Options > History (only with access to 'Maintenance Log'); Maintenance > Work Orders > Options > Component History; Maintenance > Work Orders > Options > Maintenance Log > Options > History
Description	Logs all written history for performed work.
Maintenance Causes	
Table	MaintCause
Path	File > Open Register > Maintenance > Causes
Description	Lists reasons why work is performed.
Maintenance Log	
Tables	MaintenanceLog; MaintenanceLogArchive
Paths	Maintenance > Log; Maintenance > Components/Component Hierarchy/Function Hierarchy > Options > Archive > Maintenance Log; Maintenance > Work Orders > Options > Maintenance Log/Reschedule Log
Description	Logs header information for all maintenance performed.
Maintenance Types	
Tables	MaintType
Path	File > Open Register > Maintenance > Types
Description	Lists types of work performed.
Project Categories	
Table	ProjectCategory
Path	File > Open Register > Maintenance > Project Categories
Description	Lists categories for classifying maintenance projects.

Projects	
Table	Project
Path	Maintenance > Projects
Description	Tracks projects like 'Drydocking' etc.
Reschedule Limits	
Table	RescheduleLimit
Path	File > Open Register > Maintenance > Reschedule Limits
Description	Lists the limits associated with maintenance tasks, within which work can be rescheduled.
Rounds	
Tables	Rounds
Path	Maintenance > Rounds
Description	Lists round maintenance.

Registers - Stock

Location Inventory Log	
Table	LocationInventoryLog
Path	File > Open Register > Stock > Stock Classes
Description	Records stock transactions and logs the date a location has been inventoried.
Stock Classes	
Table	StockClass
Path	File > Open Register > Stock > Stock Classes
Description	Contains a list of stock classes used for categorising stock types.
Stock Grade Categories	
Table	QACodeCategory
Path	Tools > Configuration > Stock Grade Categories
Description	Lists categories for stock grades.
Stock Grades	
Table	QACode
Path	File > Open Register > General > Stock Grades
Description	Lists stock grades.
Stock Items	
Table	SparePart
Path	Stock > Stock Items
Description	Lists all stock items.

Stock Transactions	
Tables	SparePartLog; SparePartLogArchive
Paths	Maintenance > Components > Options > Archive > Maintenance Log > Options > Stock Used (only with access to 'Maintenance Log'); Maintenance > Components > Options > Stock Transactions; Maintenance > Log > Options > Stock Used; Maintenance > Component Hierarchy > Options > Archive > Stock Transactions; Maintenance > Component Hierarchy > Options > Archive > Maintenance Log > Options > Stock Transactions (only with access to 'Maintenance Log'); Maintenance > Function Hierarchy > Options > Archive > Stock Transactions; Maintenance > Function Hierarchy > Options > Archive > Maintenance Log > Options > Stock Transactions (only with access to 'Maintenance Log'); Stock > Transactions
Description	Logs all stock item transactions.
Stock Type Stock Grades	
Table	SpareTypeQACode
Path	Stock > Stock Types > Options > Stock Grades
Description	Lists all stock grades attached to stock types.
Stock Types	
Tables	SpareType; SpareTypeHierarchy
Paths	Stock > Stock Types Stock > Stock Types Hierarchy
Description	Lists all stock types.
Transfer Documents	
Table	TransferDocument
Path	Stock > Transfer Documents
Description	A global table listing all stock transfer requests.
Transfer Reasons	
Table	TransferReason
Path	File > Open Register > Stock > Transfer Reasons
Description	Lists reasons to apply for the transfer of stock items on transfer documents between sites.

Registers - Purchase

Contracts	
Table	Contract
Path	Purchase > Contracts
Description	Lists all purchase contracts.

Custom Clearance Contract	
Table	CustomClearanceContract
Path	Purchase > Custom Clearance Contracts
Description	Lists custom clearance contracts.
Custom Clearance Forms	
Table	CustomClearanceForm
Path	Purchase > Custom Clearance Forms
Description	Lists custom clearance forms.
Custom Clearance Items	
Table	CustomClearanceItem
Path	Purchase > Custom Clearance Forms > Options > Items
Description	Lists custom clearance items.
Delivery Locations	
Table	DeliveryPlace
Path	File > Open Register > Purchase > Delivery Locations
Description	Lists delivery locations for order forms (international port codes recommended).
Delivery Terms	
Table	DeliveryTerm
Path	File > Open Register > Purchase > Delivery Terms
Description	Lists delivery terms for assigning to order forms.
e-Business Formats	
Table	PortalFormat
Path	Tools > Configuration > e-Business Formats
Description	A global table listing all potential formats for sending and receiving data from e-commerce partners.
e-Business Portals	
Table	Portal
Path	Tools > Configuration > e-Business Portals
Description	Lists all potential portals for sending and receiving data from e-commerce partners.
Expense Type	
Table	ExpenseType
Path	File > Open Register > Purchase > Expense Types
Description	Lists categories of expenses related to custom clearance contracts.

Finalise Type	
Table	FinaliseType
Path	File > Open Register > Purchase > Finalise Types
Description	Lists categories of finalisation related to custom clearance contracts.
Forms	
Tables	OrderForm; OrderLine
Paths	Purchase > Forms; Purchase > Forms > Options > Line Items
Description	Lists all order forms and order line information; requires access to at least some of these entries on the Access Control > Registers tab: 'Forms Purchase Orders Active'; 'Forms Requisition Forms Cancelled'; etc. This will grant user access to actual forms in the register - otherwise, this option does nothing.
Forms Deliveries	
Tables	Deliveries; DeliveriesLineItems
Paths	Purchase > Forms > Options > Deliveries; Purchase > Forms > Options > Deliveries > Options > Line Items
Description	Lists all deliveries scheduled for all order forms; lists all delivery lines.
Forms Purchase Orders Active	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to active purchase orders in the Forms register.
Forms Purchase Orders Cancelled	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to cancelled purchase orders in the Forms register.
Forms Purchase Orders Filed	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to filed purchase orders in the Forms register.
Forms Purchase Orders Parked	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to parked purchase orders in the Forms register.

Forms Purchase Orders Split	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to split purchase orders in the Forms register.
Forms Quality Check	
Path	Purchase > Forms > Quality Check *tab*
Description	Controls access to entry of quality claims on order forms on the Forms > Quality Check tab.
Forms Queries Active	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to active query forms in the Forms register.
Forms Queries Cancelled	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to cancelled query forms in the Forms register.
Forms Queries Filed	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to filed query forms in the Forms register.
Forms Queries Parked	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to parked query forms in the Forms register.
Forms Queries Split	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to split query forms in the Forms register.
Forms Requisition Forms Active	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to active requisition forms in the Forms register.
Forms Requisition Forms Cancelled	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to cancelled requisition forms in the Forms register.

Forms Requisition Forms Filed	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to filed requisition forms in the Forms register.
Forms Requisition Forms Parked	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to parked requisition forms in the Forms register.
Forms Requisition Forms Split	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to split requisition forms in the Forms register.
Order Form Content	
Table	OrderFormContent
Path	File > Open Register > Purchase > Order Form Content
Description	Lists possible types of content on purchase order forms - parts, provisions, etc.
Order Form Origin	
Table	OrderFormOrigin
Path	File > Open Register > Purchase > Order Form Origin
Description	Lists departmental divisions from which order forms can be created - Deck, Engine, Bridge, etc.
Order Line Stock Grades	
Table	OrderLineQACode
Path	Purchase > Forms > Options > Line Items > Options > Stock Grade
Description	Lists all stock grades which have funnelled down from the stock type level and onto order lines.
Order Priority	
Table	Order Priority
Path	File > Open Register > Purchase > Order Priority
Description	Lists priorities to apply to order forms.
Payment Terms	
Table	PaymentTerm
Path	File > Open Register > Purchase > Payment Terms
Description	Lists payment terms to apply to order forms.

Quality Check	
Table	PurchaseClaim
Path	Purchase > Quality Check
Description	Lists all quality checks and claims registered in the system. New entries can be created here; lines can also be placed onto transfer documents.
Quotation Compare Item Code	
Table	QuotationCompareItemCode
Path	File > Open Register > Purchase > Quotation Compare Item Code
Description	Lists predefined item codes for applying in the Quotation Compare Scenario Matrix.
Quotations	
Tables	Quotation; QuotationLine; QuotationCompareScenarios
Paths	Purchase > Forms > Options > Quotations Purchase > Forms > Options > Quotations > Options > Line Items Purchase > Forms > Options > Quotations > Options > Compare
Description	Lists all quotation information as received from vendors; lists all quotation lines; allows creating comparisons between quotations received from different vendors for the same items.
Transport Document	
Table	TransDocFormList
Path	Purchase > Transport Documents
Description	Lists transport documents that track the status of shipments.

Registers - Financial

Budget	
Table	BudgetCode
Path	Financial > Budget
Description	Lists all budget codes in use at a given site.
Budget Code	
Table	BudgetCodeDef; BudgetHierarchy
Paths	Financial > Budget Hierarchy; Tools > Configuration > Budget > Budget Codes
Description	Lists standard budget codes which can be registered at various sites.
Budget Commitment Formula Configuration	
Table	BudgetConfigurationCommitmentFormula
Path	Tools > Configuration > Budget > Budget Commitment Formula
Description	Lists the forecast and committed statuses for each order form type and status.

Budget Prognosis	
Table	BudgetCodePrognosis
Path	Financial > Budget > Options > Prognosis
Description	Contains budget prognosis data used to update the budget throughout the year.
Budget Prognosis Specification	
Table	BudgetCodePrognosisSpecification
Path	Financial > Budget > Options > Prognosis > Options > Specification
Description	Contains the individual expenses that create the specification for a budget code prognosis.
Budget Specification	
Table	BudgetCodeSpecification
Path	Financial > Budget > Options > Specification
Description	Contains the individual expenses which comprise the specification for a budget code.
Voucher Category	
Table	VoucherCategory
Path	Financial > Voucher
Description	Contains financial data received on invoices and credit notes.
Vouchers	
Table	Voucher
Path	Financial > Voucher
Description	Contains financial data received on invoices and credit notes.

Registers - Quality

Circulars	
Table	Circular
Path	Quality > Circulars
Description	Maintains a list of circular documents.
Claim	
Table	Claim
Path	Quality > Claims
Description	Lists all insurance claims in the system.
Conventions	
Table	Convention
Path	Quality > Conventions
Description	Contains all conventions created in the system.

Document Templates	
Table	DocTemplate
Path	File > Open Register > Quality > Document Templates
Description	Register for entering and then creating document templates.
ERS	
Table	ERS
Path	Quality > Emergency Response System
Description	For listing contacts for relevant authorities world-wide to notify in an emergency.
ERS Contact Type	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	Lists types of emergency contact groupings for the ERS window.
ERS External Contacts	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	The External tab on the Contact Types register. Defined Types appear in the External Contacts folder on the Emergency Response System window.
ERS Internal Contacts	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	The Internal tab on the Contact Types register. Defined Types appear in the Internal Contacts folder on the Emergency Response System window.
ERS Vessel Contacts	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	The Vessel Specific tab on the Contact Types register. Defined Types appear in the Vessel Specific Contacts folder on the Emergency Response System window.
Incident	
Table	Accident
Path	Quality > Incidents
Description	For registering incidents and accidents.
Installation Groups	
Table	InstGroup
Path	Tools > Configuration > Installations > Installation Groups
Description	For creating groups and adding installations to them.

Insurance	
Table	Insurance
Path	Quality > Insurance
Description	For listing insurance policies and the related details.
Insurance Category	
Table	InsuranceCategory
Path	File > Open Register > Claims > Insurance Category
Description	For creating categories to group insurance policies into.
Manuals	
Table	Manuals
Path	Quality > Manuals
Description	Contains all quality manuals registered in the system.
Non Conformity	
Tables	NonConf; JobRequisitionQS
Paths	Quality > Non Conformity > Non Conformity; Quality > Non Conformity > Observation
Description	The windows for registering Non Conformities, and Observations (requisitioning work).
Non Conformity Category	
Tables	NonConfSubCat; NonConfMainCat
Paths	File > Open Register > Non Conformity > Category > Main/Sub
Description	One register for defining sub categories; the other for defining main categories and assigning sub categories to each one.
Non Conformity Cause	
Table	NonConfCause
Path	File > Open Register > Non Conformity > Cause
Description	Lists factors which can cause non conformities to occur.
Non Conformity Severity	
Table	NonConfSeverity
Path	File > Open Register > Non Conformity > Severity
Description	Lists varying degrees of severity for applying to registered non conformities.
Non Conformity Type	
Table	NonConfType
Path	File > Open Register > Non Conformity > Type
Description	For registering types of non conformities - i.e. Observation, Major, etc.,- and assigning each one into one or more main categories.

Procedure Categories	
Table	ProcCategory
Path	File > Open Register > Quality Procedures > Categories
Description	For registering a list of categories to group quality procedures into.
Procedure Jobs	
Table	ProcJob
Path	Quality > Procedures > Revisions tab > Jobs *tab* > New/View *button*
Description	Lists jobs linked to the selected procedure and the related job description and information.
Procedures	
Table	Procedure
Path	Quality > Procedures
Description	Lists all quality procedures and procedure documents in the system.
Quality Log	
Table	QualityLog
Path	Quality > Quality Log
Description	Logs work done and history for Quality Work Orders.
Quality/Distribution/Installation	
Table	DistrInstallation
Path	Quality > Distribution > Installation
Description	A window for managing procedure document distribution by installation.
Quality/Distribution/Group	
Table	DistrGroup
Path	Quality > Distribution > Installation Group
Description	A window for managing procedure document distribution by installation group.

Registers - Voyage Management

Cargo Planning	
Table	CargoEdit
Path	Voyage > Cargoes
Description	Control access to the Cargoes window for listing cargo contents and details.
Cargo Reporting	
Table	CargoDetailResp; CargoReportEdit
Path	Voyage > Cargoes > Details *button* > Voyage > Cargoes
Description	Controls access to the Cargo Operations window and the Cargoes window.

Voyage Management Configuration	
Tables	CargoAttrTypeList; CargoTypeList; CargoGroupList; EventTypeList; DelayActivityList; DelayReasonList
Paths	File > Open Register > Voyage Management > Cargo Attribute Type/Cargo Type/Cargo Group/Event Type/Delay Activity/Delay Reason
Description	The Voyage Management setup registers.
Voyage Management Reports	
Table	Report
Path	Voyage > Voyages > Options > Reports > ; Voyage > Voyages > Port Calls *tab* > Details *button* > Options > Reports Voyage > Cargoes > Options > Reports
Description	Gives the ability to run standard Voyage Management reports.
Voyage Planning	
Table	VoyageListEdit
Path	Voyage > Voyages
Description	Controls access to the Voyages window for listing voyages.
Voyage Reporting	
Tables	ChangeStatusPortCallResp; ChangeStatusVoyageResp; SdNoonEdit
Paths	Voyage > Voyages > Port Calls *tab* > Details *button* > Options > Change Port Call Status; Voyage > Voyages > Options > Change Voyage Status > ; Voyage > Voyages > Noon Report *tab* > Details *button* >
Description	Controls access to the Change Port Call Status window; Change Voyage Status window; and Report Noon Report window.

Registers - Personnel

Accounts	
Table	Accounts
Paths	Crewing > Onboard > Accounts > Account Sheets/Templates
Description	Contains account sheets for tracking cash flow on board each vessel, and templates for the account sheets.
Convert Employee Status	
Table	EmployeeConvert
Path	Crewing > Employee > Options > Convert
Description	Employee records are never deleted; instead they are only 'hidden'. Access to this option lets a user convert a 'hidden' employee back to active status.
Other Requirements	The option to convert status is only available (with this access) on the Options menu if the selected employee record is actually hidden. To see 'hidden' employee records the user requires access to 'Crewing - Filter hidden' on the Access Control > Fields tab.

Crew Effects	
Table	CrewEffects
Path	Crewing > Onboard > Administration > Crew Effects
Description	Lists crew members' personal effects.
Employee Accumulator	
Table	Employee
Path	Crewing > Employee > Accumulators *tab*
Description	Lists the employee's accumulating wage types.
Employee Attachment	
Table	Employee
Path	Crewing > Employee > Attachments *tab*
Description	Tab for added employment-related documents to employee records.
Employee Contract	
Table	Employee
Path	Crewing > Employee > Contract *tab*
Description	Keeps track of current and historical employee contracts.
Employee Details	
Table	Employee
Path	Crewing > Employee
Description	Access to the Employee Overview window and the Address dialog opened via the Options menu.
Employee Family	
Table	Employee
Path	Crewing > Employee > Family *tab*
Description	A register listing employee's next of kin and spouse. Also keeps historical records.
Employee Fixed Transaction	
Table	Employee
Path	Crewing > Employee > Fixed Transaction *tab*
Description	Lists the employee's fixed payroll transaction which repeat every payroll period. According to access can use the New/Delete buttons to open the Fixed Transaction window and register/remove a transaction.
Employee Licenses	
Table	Employee
Path	Crewing > Employee > Educ./Lic. *tab*
Description	Lists all employee licenses, training, certifications, courses, etc.

Employee Medical	
Table	Employee
Path	Crewing > Employee > Medical Info. *tab*
Description	Lists employee's medical certificates and documents as well as records of sicknesses and recovery.
Employee Memo	
Table	Employee
Path	Crewing > Employee > Memo tab
Description	A blank tab for adding text information.
Employee Payslip	
Table	Employee
Path	Crewing > Employee > Payslip *tab*
Description	Lists the employee's payslips.
Employee Service Info	
Tables	Employee; ServiceInfo
Path	Crewing > Employee > Service *tab*
Description	Tracks current and historical services, leave days and evaluation records.
Employee Service, Evaluation	
Table	Employee
Path	Crewing > Employee > Service tab - Evaluation *button*
Description	For entering and saving employee evaluations.
Employee Variable Transaction	
Table	Employee
Path	Crewing > Employee > Variable Transaction *tab*
Description	Lists employee payroll transactions which vary from one payroll period to the next. According to access can use the New/Delete buttons to open the Variable Transaction window and register/remove a transaction.
Master Cash	
Table	StockTransaction
Path	Crewing > Onboard > Accounts > Master's Cash
Description	Tracks master's cash amounts and currencies stored onboard.

Payroll Registers	
Tables	WageTypeList; BargaggrList; WageFormula; RegisterAccumulator; RegisterBank; RegisterCurrency; RegisterPeriod; WagescaleList
Paths	File > Open Register > Payroll > Wage Type/Bargain Agreement/Accumulator/Bank/Currency Rounding/Period; File > Open Register > Payroll > Wage Type > Options > Edit Formula; File > Open Register > Payroll > Bargain Agreement > Options > Edit Wage Scale
Description	The Payroll setup registers.
Payroll Transactions	
Tables	VariableTransaction; FixedTransaction
Paths	Crewing > Payroll > Transactions > Variable/Fixed Crewing > Onboard > Transactions > Variable/Fixed
Description	For registering transactions which vary from period to period and those which are fixed at regular intervals. Grants access to the Variable Transaction window and the Fixed Transaction window from the Payroll menu entry and the Onboard menu entry.
Payroll Work Set	
Table	WorkSet
Path	Crewing > Payroll > Work Sets
Description	Lists work sets - groups of employees for whom payroll will be run.
Personnel Registers	
Table	Registers
Path	File > Open Register > Personnel
Description	The Personnel setup registers.
Planning Module	
Table	Schedule
Paths	Crewing > Planning > View Employee Plan/View Rank Plan/View Vessel Plan
Description	The Planning windows for managing crew schedules by employee, rank or vessel.
Ship Stores	
Table	ShipStore
Path	Crewing > Onboard > Administration > Ship Stores
Description	Lists special items registered for customs purposes.

SlopChest Order Forms	
Table	OrderForm
Path	Crewing > Onboard > Slopchest > Order Forms
Description	Lists all the purchase forms - requisitions, queries, and purchase orders - available in regards to AMOS Personnel slopchest purchasing. Only stock items entered in the Slopchest > Stock Items are available for purchasing with these forms. Order forms generated here are not available from the Purchase > Forms window and vice versa.
SlopChest Stock Control	
Table	StockControl
Path	Crewing > Onboard > Slopchest > Stock Control
Description	An inventory window - stock items listed in this window are limited to the Stock Items created in Slopchest > Stock Items.
SlopChest Stock Items	
Table	StockItem
Path	Crewing > Onboard > Slopchest > Stock Items
Description	The Slopchest - Stock Items window lists all items on board the vessel for sale from the slopchest.
SlopChest Stock Transaction	
Table	StockTransaction
Path	Crewing > Onboard > Slopchest > Stock Transaction
Description	Lists slopchest transactions - purchases, sales, losses, etc. - to be taken into account for payroll and to maintain inventory.
Supernumerary	
Table	Passengers
Path	Crewing > Onboard > Administration > Supernumerary
Description	Lists all extra (non-crew) passengers travelling on board.

Registers - Self Assessment

Configuration	
Table	TMSAConfiguration
Path	Tools > Configuration > Self Assessment
Description	Allows users to configure the TMSA elements, sub-elements and KPIs.
Self Assessment	
Table	TMSAAssessment
Path	Assessment > Self Assessment
Description	Allows users to enter self assessment data.

Registers - Mobile

Mobile Consolidate Database	
Table	MobileConsolidatedRegistration
Path	Tools > Mobile > Consolidated DB Registration
Description	Lists consolidated databases for all sites.
Mobile Device Register	
Table	MobileDevice
Path	Tools > Mobile > Mobile Registration
Description	Lists mobile handheld devices.
Mobile Export/Import Tasks	
Table	MobileExpImpTask
Path	Tools > Mobile > Export/Import Tasks
Description	Lists all mobile export/import tasks.
Mobile Subscription Log	
Table	MobileSubscriptionLog
Path	Tools > Mobile > Subscription Log
Description	List of all messages returned by the synchronisation process.
Mobile Synchronisation Configuration	
Table	MobileSynchConfiguration
Path	Tools > Mobile > Mobile Configuration
Description	Lists synchronisation groups and their child outward items which copy data from the AMOS Business Suite to the consolidated database, and incoming items which execute after the tasks have updated the AMOS Business Suite database with data from the consolidated database.

Registers - Risk Management

Matrix	
Table	RiskManagementMatrix
Path	Assessment > Risk Matrix
Description	For configuring likelihood/severity matrices for use with risk assessments.
Registers	
Table	RiskManagementRegister
Path	File > Open Register > Risk Management
Description	The registers to setup risk management.

Scenario	
Table	RiskManagementScenario
Path	Assessment > Risk Scenario
Description	For creating local risk scenarios and scenarios created from types.
Scenario Type	
Table	RiskManagementScenarioType
Path	Assessment > Risk Scenario Type
Description	For creating 'generic' risk scenario types.

Fields

For granting access rights to individual fields throughout the system.

Fields - Common

Account Transaction Number	
Path	Tools > Account Transactions > 'Number'
Description	Gives users the ability to edit the Account Transaction Number. Locked records cannot be edited at all.
Other Required Access	Access to the applicable Cost Centres and Edit access to the Account Transactions Register.
Address - Code	
Path	File > Open Register > Addresses > 'Code'
Description	Gives users the ability to edit the Address Code.
Other Required Access	Edit access to the Address Register.
Job Descriptions - Code	
Path	File > Open Register > Maintenance > Job Descriptions > 'Code'
Description	Gives users the ability to edit the Job Description Code.
Other Required Access	Edit access to the Job Description Register.
Report Work - Mark Work Order as Completed	
Path(s)	Maintenance > Work Orders > Options > Report Work > 'Mark Work Order as Required'; Maintenance > Report Work > 'Mark Work Order as Completed'
Description	Gives users the ability to toggle the 'Mark Work Order as Completed' field on the work order's Details tab when reporting work.
Work Order - Number	
Path	Maintenance > Work Orders > 'Number'
Description	Gives users the ability to edit the Work Order Number.
Other Required Access	Edit access to the Work Order Register.

Fields - Maintenance

Component Type - Marpol Fields	
Path	Maintenance > Component Types > 'IMO', 'Marpol'
Description	Gives users the ability to edit the Component Type user-defined fields for IMO Number and Marpol.
Other Required Access	Edit access to the Component Type register.
Component Type - Number	
Path	Maintenance > Component Types > 'Number'
Description	Gives users the ability to edit the Component Type Number.
Other Required Access	Edit access to the Component Type register.
Component, Counters - Calc. Average Field	
Path	Maintenance > Components > Counters *tab* > 'Calculate Average'
Description	Gives users the ability to toggle the 'Calculate Average' checkbox on the Components window Counters tab and enter an 'Average' counter value without requiring Edit access to the Component register (tab level access).
Component, Counter - Counter	
Path	Maintenance > Components > Counters *tab* > 'Counter' drop-down
Description	Gives users the ability to change the type of 'Counter' on the Counters tab without requiring Edit access to the Component register (tab level access).
Component, Counter - Current Fields	
Path	Maintenance > Components > Counters *tab* > 'Date Read', 'Current Value'
Description	Gives users the ability to edit the 'Date Read' and 'Current Value' fields without having Edit access to the Component register (tab level access).
Component, Counter - Depends On	
Path	Maintenance > Components > Counters *tab* > 'Depends On'
Description	Gives users the ability to edit the 'Depends On' field. The user does not need Edit access to the Component register; however, the Component lookup list will not work without it.
Component, Counter - Start fields	
Path	Maintenance > Components > Counters *tab* > 'Start Date', 'Latest Start Value'
Description	Gives users the ability to edit the 'Start Date' and 'Latest Start Value' fields without having Edit access to the Component register (tab level access).

Component, Counter - Zeroed fields	
Path	Maintenance > Components > Counters *tab* > 'Latest Zeroed Date', 'Total at Zeroed'
Description	Gives users the ability to edit the 'Latest Zeroed Date' and 'Total at Zeroed' fields.
Other Required Access	Edit access to the Component register.
Component - Number	
Path	Maintenance > Components > 'Number'
Description	Gives users the ability to edit the Component 'Number'.
Other Required Access	Edit access to the Component register.
Functions - Function Number	
Path(s)	Maintenance > Functions/Function Hierarchy > 'Number'
Description	Gives users the ability to edit the Function 'Number'.
Other Required Access	Edit access to the Function register.
Project - Estimated Duration Locked	
Path(s)	Maintenance > Projects > 'Locked'
Description	Gives users the ability to lock a project's 'Estimated Duration' field by toggling the 'Locked' checkbox.
Other Required Access	Read and Edit access to the Project register and to the individual project itself.
Projects - Number	
Path	Maintenance > Projects > 'Project No'
Description	Gives users ability to edit the Project 'Number'.
Other Required Access	Read and Edit access to the Project register and to the individual project itself.
Rounds - Code	
Path	Maintenance > Rounds > 'Code'
Description	Gives users the ability to edit the Round 'Code'.
Other Required Access	Edit access to Rounds register.

Fields - Stock

Current Stock	
Path	Stock > Stock Items > 'Current Stock'
Description	Gives users the ability to edit the 'Current Stock' field on the Stock Item window.
Other Required Access	Edit access to the Stock Item register and Execute accesson the function 'Update Stock Quantity'.

Stock Type - Marpol Fields	
Path	Stock > Stock Types > 'IMO', 'Marpol'
Description	Gives users the ability to edit the Stock Type user-defined fields for 'IMO Number' and 'Marpol'.
Other Required Access	Edit access to the Stock Types register.
Stock Type - Number	
Path(s)	Stock > Stock Types/Items > 'Number'
Description	Gives users the ability to edit the Stock Type or Item 'Number'.
Other Required Access	Edit access to the Stock Types register.
Stock Type - Alter Stocked Item	
Path	Stock > Stock Types > Available Stock *tab* > 'Stocked Item'
Description	Gives users the ability to toggle the 'Stocked Item' checkbox on the Stock Types window Available Stock tab.
Other Required Access	Edit access to the Stock Types register.
Transfer Document - Number	
Path	Stock > Transfer Documents > 'Number'
Description	Gives users the ability to edit the Transfer Document 'Number'.
Other Required Access	Edit access to the Transfer Document register.

Fields - Purchase

Contract - Number	
Path	Purchase > Contracts > 'Number'
Description	Gives users the ability to edit the Contract 'Number'-
Other Required Access	Edit access to the Contracts register.
Delivery - Portal Queue	
Path	Purchase > Forms > Options > Deliveries > 'Portal Queue'
Description	Gives users the ability to flag the Delivery window 'Portal Queue' field, and so mark the Transport.QueuedForBusinessToBusiness field in the database. This marks the delivery to be sent with the next portal export.
Other Required Access	Edit access to Forms and Deliveries.
Form - Generic Queue	
Path	Purchase >Forms > 'Generic Queue'
Description	Gives users the ability to flag the Forms window 'Generic Queue' field, and so mark the OrderForm.QueuedForTransfer field in the database.
Other Required Access	Edit access to the Order Form register.

Form - Number	
Path	Purchase > Forms > 'Number'
Description	Gives users the ability to edit the Order Form 'Number'.
Other Required Access	Edit access to the Order Form register.
Form - Ordered Date	
Path	Purchase > Forms > 'Ordered'
Description	Gives users the ability to edit the Form 'Ordered' Date.
Other Required Access	Edit access to the Order Form register.
Form - Portal Queue	
Path	Purchase > Forms > 'Portal Queue'
Description	Gives users the ability to flag the Form's 'Portal Queue' field, and so mark the OrderForm.QueuedForBusinessToBusiness field in the database. This marks the form to be sent with the next portal export.
Other Required Access	Edit access to Forms and Purchase Orders.
Quotation - Portal Queue	
Path	Purchase > Forms > Options > Quotations > 'Portal Queue'
Description	Gives users the ability to flag the Quotation's 'Portal Queue' field, and so mark the Quotation.QueuedForBusinessToBusiness field in the database. This marks the query to be sent with the next portal export.
Other Required Access	Edit access to Forms, Queries and Quotations.
Transport Document - Document No.	
Path	Purchase > Transport Documents > 'Document No.'
Description	Gives users the ability to edit the Transport Document 'Number'.
Other Required Access	Edit access to the Transport Document register.

Fields - Financial

Budget Group - Approval Limit	
Path	Financial > Budget Hierarchy > 'Approval Limit'
Description	Gives users the ability to edit the budget group's 'Approval Limit'.
Other Required Access	Edit access to the Budget Code register.

Budget Group - Approval Warning	
Path	Financial > Budget Hierarchy > 'Approval Warning'
Description	Gives users the ability to edit the budget group's 'Approval Limit'.
Other Required Access	Edit access to the Budget Code register.
Voucher - Voucher No.	
Path	Financial > Voucher > 'Voucher No.'
Description	Gives users the ability to edit the Voucher 'Number'.
Other Required Access	Edit access to the Voucher register.

Fields - Quality

Circular Number	
Path	Quality > Circular > 'Number'
Description	Gives users the ability to edit the circular 'Number'.
Other Required Access	Edit access to the Circulars register.
Claim No	
Path	Quality > Claims > 'Claim Number'
Description	Gives users the ability to edit the 'Claim Number'.
Other Required Access	Edit access to the Claim register.
Incident No	
Path	Quality > Incidents > 'Incident No.'
Description	Gives users the ability to edit the 'Incident No.'.
Non Conformity - Number	
Path	Quality > Non Conformity > Non Conformity > 'Number'
Description	Gives users the ability to edit the non conformity 'Number'.
Other Required Access	Edit access to the Non Conformity register.

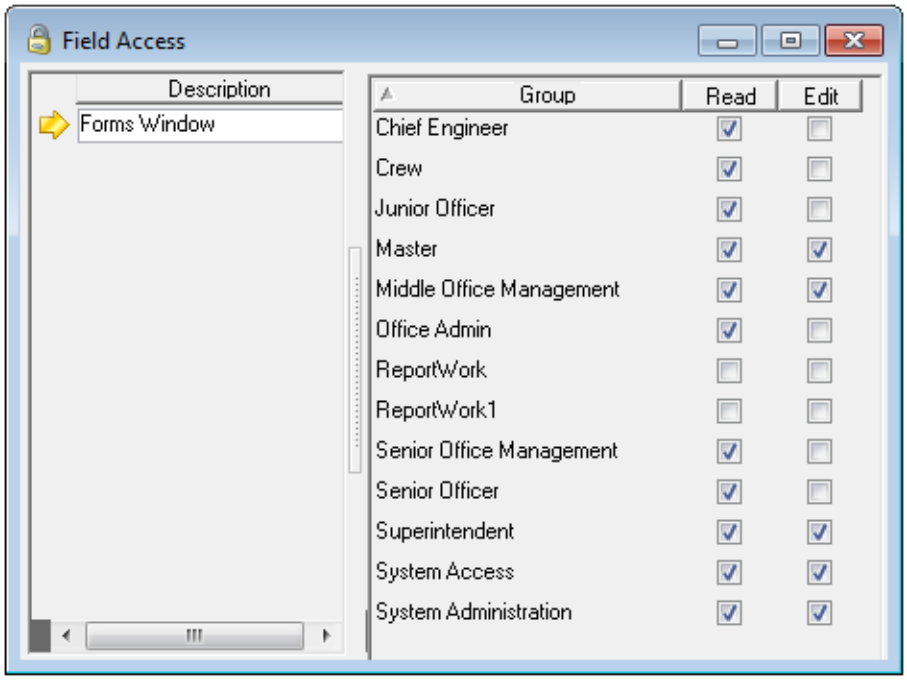
Fields - Personnel

Contract Termination	
Path	Crewing > Employee > Contract *tab* > 'Termination'
Description	The lookup field for selecting a termination reason on an employee's contract.
Other Required Access	Edit access to the Employee Contract register.

Crewing - Filter hidden	
Path	Crewing > Employee > Filter > Basic *tab* > 'Show Hidden' drop-down
Description	The drop-down field to select 'Yes' or 'No' to see hidden employee records when filtering the Employee Overview window. Note that selecting to view hidden records makes the resulting window read-only.
Sickness Recovery	
Path	Crewing > Employee > Medical Info. *tab* > Sickness *button* > Recovered 'Date'
Description	A calendar field for recording the date an employee recovers from a registered illness.
Other Required Access	Edit access to the Employee Medical register.

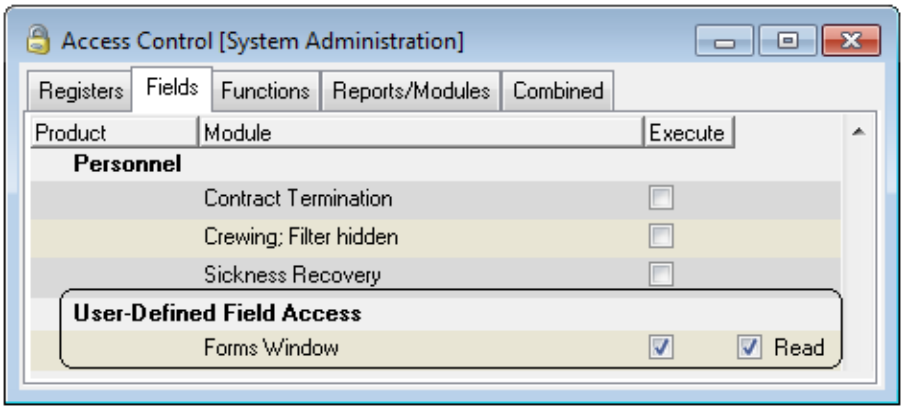
Fields - User Defined Field Access Configurations

Once you add a field/tab reference to a field access configuration, it is protected and inaccessible until you grant certain user groups access to it. This can be done directly in the Field Access window:



Checking **Edit** automatically grants **Read** access as well. Checking **Read** allows the user group read only access to the field grouping. The field(s)/tab(s) will be protected from everyone else automatically.

Defined access groupings are also listed here in the Access Control window Fields tab:



Select a field access configuration and flag **Read** and/or **Execute** access.

- When **Read** and **Execute** are checked, the users in that group will be able to see and edit the relevant fields, according to their group access rights. If they do not have edit access on the window already and you grant edit access on the protected field grouping, the field(s) still remain read-only.
- When only **Read** is checked the users will be able to read but not edit the relevant fields even if they have Edit access rights in that window - unless an expression has been defined on the field allowing editing also.
- If you do not check **Read** (i.e. neither box is checked) the field will be completely hidden even if the group has Read or Edit access for the relevant window. In the case that a tab is defined as unreadable, set the parameter 'Hide Inaccessible Menu Entries' to True to hide the tab. Set it to False to render the tab visible but disabled.

See section 13.6 for more about creating and granting access to field access configurations.

Fields - Risk Management

Scenario Code	
Path	Assessment > Risk Scenario > 'Code'
Description	Gives users the ability to edit the risk scenario 'Code'.
Other Required Access	Edit access to the Scenario register.
Scenario Type Code	
Path	Assessment > Risk Scenario Type > 'Risk Scenario Type'
Description	Gives users the ability to edit the risk scenario type 'Risk Scenario Type' code.
Other Required Access	Edit access to the Scenario Type register.

Functions

For granting rights to execute individual functions throughout the system.

Functions - Common

Access to all disciplines of W.O.	
Path	Maintenance > Work Orders
Description	Overrides the option to 'Auto-filter WO by Discipline' so that users can see all work orders for all disciplines.
Access to all Mailboxes	
Path	Tools > Configuration > Users > Options > Mailbox Access
Description	Gives users the ability to see objects like order forms, work orders, etc., regardless of whose mailbox the objects are in. This function applies only to work flow objects. The advantage to using this function is that it is not necessary to enter which users can see into other user's mailboxes - the access is granted to all the relevant group's members.
Address Convert	
Table	AddressConvert
Path	File > Open Register > Addresses > Options > Convert
Description	Provides the ability to convert an address from the unlocked state to a locked state, as long as the user has Edit access to the Address register. Users with access to 'Edit Locked Addresses' will also be able to convert the address from locked to unlocked.
Other Requirements	Edit access to the Address register.
Allow Windows Login Verification	
Description	Rather than setting the corresponding system parameter which allows global usage of the Windows login functionality, flag this option to set access at user group level instead.
Approve Maintenance Job Descriptions	
Table	JobDescriptionRevisionApproval
Path	File > Open Register > Maintenance > Job Descriptions > Revisions *tab* > Approve *button*
Description	Gives users the ability to approve job description revisions.
Other Requirements	Read access to the Job Description register. The parameter 'Job Description Revision Control' must be set to TRUE for this function to be available.
Audit Trail Log	
Table	AuditTrailLog
Path	Tools > Audit Trail Log
Description	Gives users the ability to view the Audit Trail Log.
Other Requirements	User requires access to the tables specified in the Audit Trail configuration.

Audit Trail Trigger Generation	
Path	Tools > Configuration > Audit Trail Configuration > Options > Generate Triggers...
Description	Gives users the ability to generate the triggers that will populate the Audit Trail Log.
Change Password	
Table	ChangePassword
Path	Tools > Change Password
Description	Gives users the ability to change their own password.
Define Group Field List	
Path	Tools > Options > Predefined Fields *tab*
Description	Gives users the ability to define specific columns (a list of fields) that differ from the default list for a particular screen, and select the group(s) who will see these default columns upon opening that screen.
Define Group Filter Criteria	
Path	Tools > Options > Predefined Filters *tab*
Description	Gives users the ability to define specific filter criteria that differs from the default criteria for a particular filter, and select the group(s) who will see these default criteria when they open that filter.
Define Group Views	
Path	Tools > Options > Views *tab*
Description	Gives users the ability to define specific 'Views' which capture certain filter criteria and field lists, and select the group(s) who will be able to select these views.
Define Private Field List	
Path	Tools > Options > Predefined Fields *tab*
Description	Gives users the ability to define specific columns (a list of fields) that differ from the default list for a particular screen, and that will only apply to the same individual user when he/she opens that screen.
Define Private Filter Criteria	
Path	Tools > Options > Predefined Filters *tab*
Description	Gives users the ability to define specific filter criteria that differs from the default criteria for a particular filter, and that will apply only to the same individual user when he/she opens that filter.
Define Private Views	
Path	Tools > Options> Views *tab*
Description	Gives users the ability to define specific 'Views' which capture certain filter criteria and field lists and that only the same individual user will be able to select to view.

Define System Views	
Path	Tools > Options > Views *tab*
Description	Gives users the ability to define specific 'Views' that capture certain filter criteria and field lists and that will be available for any user to select.
Define System Wide Field List	
Path	Tools > Options > Predefined Fields *tab*
Description	Gives users the ability to define specific columns (a list of fields) that differ from the default list for a particular screen, and that will be apply to all users who can access that screen.
Define System Wide Filter Criteria	
Path	Tools > Options > Predefined Filters *tab*
Description	Gives users the ability to define specific filter criteria that differs from the default criteria for a particular filter, and that will apply to all users who can access that filter.
Delegate Mailbox Access	
Tables	WorkFlowMailboxDelegate; WorkFlowMailboxLog
Paths	Tools > Delegate Mailbox Access; Tools > Mailbox Access Log
Description	Provides the ability to delegate the objects in any user's mailbox to another mailbox. This function applies only to work flow objects, and includes the ability to 'Delegate Private Mailbox Access'.
Delegate Private Mailbox Access	
Tables	WorkFlowMailboxDelegate; WorkFlowMailboxLog
Path	Tools > Delegate Mailbox Access; Tools > Mailbox Access Log
Description	Provides the ability to delegate objects in your own individual mailbox to another user. This function applies only to work flow objects.
Edit Locked Addresses	
Path	File > Open Register > Addressess
Description	Gives Edit access to 'Locked' addresses.
Export	
Table	ManualExport
Path	File > Export/Import > Export
Description	Provides the ability to export data.
Hand Terminal Interface	
Table	HandTerminalInterface
Path	Tools > Hand Terminal Interface
Description	Gives the ability to import a hand terminal file.

Import	
Table	ManualImport
Path	File > Export/Import > Import
Description	Provides the ability to import data.
Maintenance and Stock Analysis	
Paths	Maintenance > Workload Analysis Stock > Stock Analysis
Description	Provides ability to estimate the work load by discipline, or the stock usage for future work.
Maintenance and Stock Forecast	
Tables	AnalysisWorkload; AnalysisStock
Paths	Maintenance > Workload Forecast Stock > Stock Forecast
Description	Provides the ability to forecast the workload by discipline, or the stock usage for future work.
Move Address References	
Table	AddressSelect
Path	File > Open Register > Addresses > Options > Move Address References
Description	Provides the ability to stamp all data belonging to one vendor with another vendor's primary key. This is useful when you have multiple entries for one vendor and you want to consolidate them.
Move User References	
Path	Tools > Configuration > Access Control > Users > Options > Move User References
Description	Provides the ability to stamp all data belonging to one user with another user's primary key. This is useful when you have many entries for users who are no longer with the company and you want to consolidate those users. Usually reserved for system administrators.
Overview Panels Viewer	
Tables	OverviewPanelSelect; OverviewPanelViewer
Path	Tools > Overview Panels
Description	Provides users with the ability to review and select from a list of overview panels to which they have access.
Other Requirements	Access rights to view individual overview panels is set in the Overview Panels Configuration window.
Parameters	
Table	Switch
Path	Tools > Configuration > Parameters
Description	Gives the ability to modify the system's parameters. Usually reserved to system administrators.

Password Crypting	
Table	PasswordScrambler
Path	Tools > Utilities > Password Scrambling
Description	Gives users the right to encrypt the password used to connect to the database.
Permits to Work Issuing	
Table	ChangeWorkPermitStatus
Path	Maintenance > Work Orders > Options > Change Status of Permit to Work
Description	Gives users the right to issue a permit to work in order to report on a work order.
Print Labels	
Tables	NoOfLabels; UsrLabels
Paths	Stock > Stock Items > Options > Print Label Purchase > Forms > Options > Print Label Purchase > Forms > Options > Receive
Description	Gives the ability to print labels for stock items. Requires Read and Edit access to Forms in order to select either the 'Ordered Quantity' or 'Quantity' radio buttons on the list of order forms.
Report Work; Detailed	
Tables	WorkDoneSelect; WorkDone
Paths	Maintenance > Components/Component Hierarchy > Options > Report Work; Maintenance > Function Hierarchy > Options > Report Work; Maintenance > Report Work; Maintenance > Work Orders > Options > Report Work
Description	Gives the ability to report work.
Reports	
Table	RunReport
Path	Tools > Reports
Description	Gives access to the list of standard reports in the system.
Other Requirements	The ability to execute those standard reports is controlled by the settings on the Reports/Modules tab in the Access Control window.
Reschedule Work Orders	
Path	Maintenance > Work Orders
Description	Allows users to edit the 'Due Date' on work orders.
Select View	
Table	ScreenConfigSelect
Path	Tools > Select View
Description	Gives the ability to use shortcuts to access customized views.

Set Idle Time Out	
Path	Tools > Options > General *tab*
Description	Gives the ability to enter a number in the 'Idle Time Out (Min)' box. This number can fall between 0 (no timeout) and 999. Regardless of the entry here, the parameter setting 'Idle Timeout' takes precedence.
Set Multiple Address Type	
Table	AddressSetAddressType
Path	File > Open Register > Addresses > Options > Set Address Type
Description	Gives the ability to open the Set Address Type dialog and define multiple address types for one or more flagged addresses.
Switch Department	
Tables	SelectDepartment; SwitchDepartment
Path	File > Switch Department
Description	Gives users the ability to change from one department to another.
System Administration (Execute SQL)	
Tables	ExecuteSQL; DBAdmin
Paths	Tools > Utilities > Execute SQL/Execute SQL (File)
Description	Allows users to execute SQL scripts in a window within AMOS by using the <Ctrl><Shift><F10> key combination; usually reserved to system administrators.
Other Requirements	The <Ctrl><Shift><F9> key combination allows you to run SQL commands placed in a file with a DBA extension, but to do this you must have Execute access to the Complete System, which gives you access to the entire system regardless.
System Administration (General Info)	
Table	GeneralInfo
Description	Allows users to bring up the General Info. window within AMOS by using the <Ctrl><Shift><F8> key combination; usually reserved to system administrators.
Task Server	
Table	TaskServer2
Path	File > Export/Import > Task Server
Description	Provides the ability to run the task server.
Tasks; Perform Task	
Path	File > Export/Import > Tasks
Description	Provides the ability to run tasks.

Update System License	
Tables	UpdateSystemLicense
Path	File > Update System License...
Description	Gives users the ability to update the system license in the event that new options have been added to the license file; ususally reserved to system administrators. Upgrading functionality requires users to log out of the system before the functionality appears. Downgrading functionality does not.
User Options	
Tables	UserOptions; ScreenConfigSave
Path	Tools > Options
Description	GIves users the ability to change their options and create customised views for looking at data.
User Options; Remote Work Flow	
Path	Tools > Options
Description	Gives users the option to flag the 'Remote Work Flow' checkbox on the General tab. Doing so allows the user to receive remote work flow notifications.
View Image	
Description	Provides the ability to view attachments linked to any of the data registers.
View Price Information; Account Transactions	
Path	Tools > Account Transactions
Description	Provides the ability to view price and currency from the Account Transactions window.
View PSR Reports	
Table	ViewPSRFile
Path	Tools > View PSR Reports
Description	Provides the ability to view reports saved as type PowerSoft Report.
Work Flow, Approve	
Table	WorkFlowApprove
Path	Tools > Configuration > Work Flow > Revision tab > Approve button
Description	Lets users click the button to open the Approve dialog from the Work Flow Configuration window, and approve a new revision.
Other Requirements	Work Flow Configuration revisioning must be in use - set the 'Use Revision' parameter to TRUE.

Work Order Control	
Path	Maintenance > Work Orders
Description	Gives chief engineer the ability to 'control' work orders; that is, to review them upon completion.
Other Requirements	Edit access to the Work Order register.
Work Order Filed	
Path	Maintenance > Work Orders
Description	Gives users the ability to toggle the 'Filed' checkbox on a work order.
Other Requirements	Edit access to the Work Order register.
Work Order Issuing	
Path	Maintenance > Work Orders
Description	Lets users issue work orders.
Other Requirements	Edit access to the Work Order register.
Work Orders Cancellation	
Path	Maintenance > Work Orders
Description	Lets users cancel work orders.
Other Requirements	Edit access to the Work Order register.

Functions - Maintenance

Branch Sort, Component Hierarchy	
Path	Maintenance > Component Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Branch Sort, Component Type Hierarchy	
Path	Maintenance > Component Types Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Branch Sort, Function Hierarchy	
Path	Maintenance > Functions Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.

Change Component Status	
Table	ComponentChangeStatus
Paths	Maintenance > Components > Options > Change Status; Maintenance > Component Status Log
Description	Provides the ability to change a component's status, assuming that the component is not already 'In Use' in a centralised database. The 'Work Order' field allows for associating the action with an existing work order.
Change Functions Status	
Table	FunctionsChangeStatus
Paths	Maintenance > Functions/Function Hierarchy > Options > Change Status
Description	Provides the ability to change a function's status to 'In Use' or 'Scrapped'.
Change Transferred Component Status	
Table	ComponentChangeStatus
Path	Maintenance > Components > Options > Change Status
Description	Provides the ability to change the status of a 'Transferred' component.
Component Copy	
Path	Maintenance > Components > Options > Copy
Description	Gives the ability to copy components.
Component Job; Field Linkage to Type	
Paths	Maintenance > Components > Options > Show Indicators/Link All to Type/Remove All Links to Type/ Copy Link from Selected
Description	Gives ability to toggle the 'Show Indicators' option. If 'Show Indicators' is flagged, then the user has the ability to select the 'Link All to Type', 'Remove All Links to Type', and 'Copy Link from Selected' options.
Copy Component Type	
Path	Maintenance > Component Types > Options > Copy
Description	Gives the ability to copy component types, as well as registering one component for the new component type.
Counter Log	
Table	CompCounterLog
Path	Maintenance > Counters > Counter Log
Description	Allows user to review logged counter information.
Counters; Overview	
Table	CompCounterLog
Path	Maintenance > Counters > Overview
Description	Allows users to see an overview of current counter information.

Counters; Replace	
Table	ComponentsCountersReplace
Path	Maintenance > Components > Counters *tab* > Replace *button*
Description	Alllows users to replace a counter that does not have a dependency.
Counters; Set Start	
Tables	ComponentsCounterSetStart
Path	Maintenance > Components > Counters *tab* > Set Start *button*
Description	Allows users to set the 'Start Date' and 'Latest Start Value' on a counter. If the 'New Latest Start Value' is not zero then you will see the computed 'Change in Current Value'. To change the 'Current Value' of the counter flag the 'Adjust Current Value' checkbox. To update these values for dependant components, flag the 'Update Depending Counters' checkbox.
Counters; Set Start - Counters with Dependency	
Path	Maintenance > Components > Counters *tab* > Set Start *button*
Description	Allows users to set the 'Start Date' and 'Latest Start Value' on a counter that depends on another counter.
Other Requirements	Access to the function 'Counters: Set Start'
Counters; Update	
Table	CompCounterUpdate
Paths	Maintenance > Components > Counters *tab* > Update *button*; Maintenance > Counters > Update
Description	Allows users to update the 'Current Value' and 'Date Read' for a counter by entering the 'Current Value' and 'Current Date'. To update these values for dependent components, flag the 'Update Depending Counters' checkbox.
Counters; Update - Counters with Dependency	
Paths	Maintenance > Components > Counters *tab* > Update *button*; Maintenance > Counters > Update
Description	Gives ability to update the 'Current Value' and 'Date Read' on a counter that depends on another counter.
Other Requirements	Access to the function 'Counters: Update'.
Delete Maintenance Task	
Path	Maintenance > Work Planning > Options > Delete Maintenance Tasks
Description	Gives the ability to delete maintenance tasks which do not have any requests for materials attached to them.

Delete Work Order Assessment	
Path	Maintenance > Work Orders > Risk Assessments *tab*
Description	Gives the ability to delete risk assessments listed on the Work Orders window Risk Assessments tab. Allows for deletion of assessments even without delete access on the Work Orders window itself.
Other Requirements	Read and Edit access on the Work Orders register.
Function; Install Component	
Tables	RotationLog
Paths	Maintenance > Functions/Function Hierarchy > Options > Install Component
Description	Gives the ability to install a component on a function.
Function; Remove Component	
Tables	RotationLog
Path	Maintenance > Functions/Function Hierarchy > Options > Remove Component
Description	Gives the ability to remove a component from a function.
Generate Maintenance Task	
Path	Maintenance > Work Planning > Options > Generate Maintenance Tasks
Description	Gives the ability to generate, or create a series of, maintenance tasks.
Job Requisition on Work Order	
Path	Maintenance > Work Orders > Options > Requisition Work on Work Order/Included Jobs *tab* > Requisition *button*
Description	Allows users to create new Requisition work orders directly from any existing maintenance work order and from any included job on a Round work order.
Job Requisitioning	
Table	JobRequisition
Paths	Maintenance > Components/Component Hierarchy/Functions/Function Hierarchy > Options > Requisition Work; Maintenance > Requisition Work
Description	Allows users to create ad hoc work requests for one-time jobs like installation or breakdown maintenance.
Link to Component	
Path	Stock > Stock Items > Options > Link to Component
Description	Gives the ability to link a stock type to a component type from the Stock Items window. Useful in a non-centralised database configuration.
Maintenance Job Planning	
Table	xComponentJobPlanning
Path	Maintenance > Job Planning
Description	Gives access to the graphical Job Planning interface.

Maintenance Planning	
Path	Maintenance > Work Planning.
Description	Gives access to the graphical Work Planning interface.
Manually Trigger Work Order	
Path	Maintenance > Components > Jobs > Options > Create Work Order
Description	Gives users the ability to create a work order directly from the Component Jobs window. Useful in situations where there is counter-based maintenance but no counter readings recorded yet and so, no average running time. In order for the job to show up in the backlog, a work order needs to be generated manually.
Measure Point Log	
Table	CompMeasurePointLog
Path	Maintenance > Measure Points > Measure Point Log
Description	Allows users to review logged measure point information.
Measure Points; Overview	
Table	CompMeasurePointOverview
Path	Maintenance > Measure Points > Overview
Description	Allows users to see an overview of current measure point information.
Measure Points; Update	
Table	CompMeasurePointUpdate
Paths	Maintenance > Components > Measure Points *tab* > Update; Maintenance > Measure Points > Update
Description	Allows users to enter measure point information.
Move Job References	
Path	File > Open Register > Job Descriptions > Options > Move Job References
Description	Provides the ability to stamp all data belonging to one job with another job's primary key. Useful for cleaning up job list.
Order Spares from Maintenance Task	
Path	Maintenance > Work Planning > Options > Order Parts
Description	Gives users the ability to order the required parts attached to a maintenance task.
Other Requirements	Insert access to Forms and to the particular type of Form they want to create (Requisition, Purchase Order, Query).
Project; Copy Project	
Path	Maintenance > Projects > Options > Copy Project...
Description	Allows users access to the Copy Project dialog; to select and copy parts or all of a project.

Project; Create Job(s) from Job Description(s)	
Path	Maintenance > Projects > Options > Create Job(s) from Job Description(s)
Description	Gives access to the menu entry and then the wizard to add job descriptions to project sections.
Project; Create Project Specification	
Path	Maintenance > Projects > Options > Create Project Specification...
Description	Gives access to create and save a project specification.
Project; Move Project Job	
Path	Maintenance > Projects > Options > Move Project Job...
Description	Gives access to the dialog for moving project jobs to another section.
Reschedule Maintenance Task Outside Limit	
Path	Maintenance > Work Planning > Maintenance Tasks > Planned Due Date
Description	Gives the ability to move a task prior to the limit defined in the reschedule limit for that component job. It is not possible to move a job into the future beyond its reschedule limit.
Round; Create Work Order	
Path	Maintenance > Rounds > Options > Create Work Order
Description	Gives the ability to create a work order directly from the Rounds window. One important point to remember when creating round work orders is that there may already be existing work orders in the backlog for jobs that have been attached to the round. These work orders must be cancelled or else there will be a duplication of effort.
Transfer Component In	
Table	ComponentTransferIn
Path	Maintenance > Components > Options > Transfer In
Description	Gives the ability to send a component marked as 'Transferred' to a new department.
Transfer Component Out	
Path	Maintenance > Components > Options > Change Status
Description	Gives the ability to mark a component as 'Transferred'.
Trigger Jobs	
Path	Maintenance > Trigger Jobs
Description	Gives the ability to trigger maintenance jobs that are event-based (as opposed to periodic) to generate work orders for them.
View Measure Point Trend	
Path	Maintenance > Measure Points > Update > Options > Measure Point Trend
Description	Gives access to the Measure Point Trend window.

View Price Information; Report Work	
Paths	Maintenance > Work Orders > Options > Report Work > Stock Used tab; Maintenance > Report Work > Stock Used tab
Description	Provides the ability to view price and currency from the Stock Used tab while reporting work.
Work Order Generation	
Path	Maintenance > Generate Work Orders
Description	Allows users to generate new work orders after a new job has been attached to a component; a new round has been created; or, a component's run-time has been updated and it now has an average value. Useful when a new database is to be installed and the maintenance parameter 'Automatically Reschedule Work Orders' has been switched from TRUE to FALSE.
Works Orders; Copy	
Path	Maintenance > Work Orders > Options > Copy
Description	Gives the ability to copy work orders.
Work Orders; Create Order Form	
Path	Maintenance > Work Orders > Options > Order
Description	Gives the ability to create service line items on order forms from a work order.
Work Orders; Create Sub-Work Order	
Path	Maintenance > Work Orders > Options > Create Sub-Work Order
Description	Gives the ability to create sub-work orders. Sub-work orders receive the same number as their parent work order with a letter designation at the end (-a, b, c, etc.). The main work order cannot be reported on til all subs are completed and filed.

Functions - Stock

Branch Sort, Stock Hierarchy	
Path	Stock > Stock Types Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Comp Spare Status	
Table	SpareSetStatus
Path	Maintenance > Component Types > Parts *tab* > Set Status *button*
Description	Gives the ability to change a spare part's status in reference to a component type it is a part of, in the Component Type window. The new status can be applied onto the stock type itself, provided the stock is not registered as an active part of any other equipment.

Depreciation Levels	
Table	SpareDepreciation
Path	Tools > Configuration > Depreciation Levels
Description	Gives access to the global table that lists the five depreciation levels.
Edit Inactive Stock Details	
Path	Stock > Stock Types
Description	Provides the ability to edit the details on inactive stock types (types with status set to Scrapped or Obsolete).
Other Requirements	Access to 'View Inactive Stock Details'
Edit Submitted Transfer Documents	
Path	Stock > Transfer Documents
Description	Gives the ability to edit transfer documents after they have been submitted.
Permit to take a Spare Even When Over-booked	
Paths	Stock > Stock Items > Options > In/Out of Stock; Stock > Control; Stock > In/Out of Stock
Description	Gives the ability to take out stock items that have been booked on work orders.
Reverse Stock Transaction	
Path	Stock > Transactions > Options > Reverse Transaction
Description	Gives users the ability to reverse stock transactions in case of error. Usually reserved to system administrators.
Stock Control	
Table	InventoryControl
Paths	Stock > Stock Items > Options > In/Out of Stock/Move; Stock > Control; Stock > In/Out of Stock
Description	Gives users the ability to update inventory.
Stock Item Status	
Table	SpareSetStatus
Path	Stock > Stock Items > Options > Set Status
Description	Gives the ability to change the status on one or more selected individual stock items.
Stock Optimiser	
Path	Stock > Stock Optimiser
Description	Gives users the ability to run the Stock Optimiser program.

Stock Type Status	
Table	SpareSetStatus
Path	Stock > Stock Types > Options > Set Status
Description	Gives the ability to change the status on one or more stock types. The status change can reflected on items of the type.
Stock Type; Link to Component Type	
Path	Stock > Stock Types > Options > Link to Component
Description	Gives users the ability to link a stock type to a component type from the Stock Type window. Useful in a centralised database configuration.
Stock Type; Register as Stock Item	
Path	Stock > Stock Types > Options > Register as Stock Item
Description	Gives the ability to register a stock type as a stock item.
Stock Wanted	
Table	Requisition
Path	Stock > Wanted
Description	Gives the ability to use the Stock Wanted list for ordering.
Stock Wanted; Calculate Wanted	
Table	RequisitioningAuto
Path	Stock > Wanted > Options > Calculate Wanted Quantities
Description	Gives the ability to calculate the 'wanted' stock quantity based on reorder level/reorder quantity/minimum level/maximum level.
Transfer Document; Approve	
Path	Stock > Transfer Documents > Options > Change Approval
Description	Gives the ability to approve transfer documents after they have been submitted.
Transfer Document; Receive	
Table	TransferLineReceive
Path	Stock > Transfer Documents > Options > Receive
Description	Gives the ability to receive transfer documents at the recipient installation.
Transfer Document; Submit	
Path	Stock > Transfer Documents > Options > Submit
Description	Gives the ability to submit transfer documents.
Transfer Document; Transfer	
Table	TransferLineTransfer
Path	Stock > Transfer Documents > Options > Transfer
Description	Gives ability to edit transfer documents after they have been submitted.

Transfer Documents; Create Order Form	
Path	Stock > Transfer Documents > Options > Line Items > Options > Create Order Form
Description	Gives the ability to create order forms from the Line Items on transfer documents.
Update Stock Quantity	
Path	Stock > Stock Items
Description	Gives users the ability to update the 'Current Stock' field on the Stock Items window. Generally to be avoided because all quantity updates should create a stock transaction and updating this field does not do that.
Other Requirements	Edit access to the Stock Items register and access to the 'Current Stock' field.
View Component Type; Stock Items	
Path	Maintenance > Component Types > Parts *tab* > View *button*
Description	Provides the ability to view stock items from the Component Type's Parts tab.
View Inactive Stock Details	
Paths	Stock > Stock Types/Items
Description	Provides the ability to view inactive stock types/items (stock with status set to Scrapped or Obsolete).
View Price information; In/Out of Stock	
Path	Stock > In/Out of Stock
Description	Provides the ability to view price and currency from the In/Out of Stock window.
View Price Information; Multi Vendor	
Paths	Stock > Stock Types/Items > Vendors *tab*
Description	Provides the ability to view price and currency from the Stock Types/Items window Vendors tab.
View Price Information; Stock	
Path	Stock > Stock Items
Description	Provides the ability to view the 'Last Purchase Price' and currency, and 'Average Price' and currency from the Stock Item window.
View Price Information; Stock Transactions	
Path	Stock > Stock Transactions
Description	Provides the ability to view a transaction's price and currency from the Stock Transactions window.
View Price Information; Stock Type	
Path	Stock > Stock Types
Description	Provides the ability to view the 'Last Purchase Price' and currency from the Stock Types window.

View Price Information; Stock Wanted	
Path	Stock > Wanted
Description	Provides the ability to view the 'Last Purchase Price' and currency from the Stock Wanted window.

Functions - Purchase

Allow Editing Forms of all Origin	
Path	Purchase > Forms
Description	If one or more form 'origins' is assigned to a user or his/her group, he/she can only edit forms coming from those origins, as well any forms without an origin assigned. Flag this setting to allow users to edit any purchase form regardless of its origin.
Allow Selecting Blacklisted Vendors	
Paths	Purchase > Forms; Purchase > Forms > Options > Quotations
Description	Provides an additional lookup button next to the 'Vendor' field on the Forms window and Quotations window. Clicking this button will open a vendor list which includes blacklisted vendors (otherwise unavailable for selection).
Approve Purchase Order Beyond Budget Control Limit	
Path	Purchase > Forms
Description	When budget control limits are in place, flagging this setting allows users to bypass budget value limits and warnings defined against a budget group and approve purchase order forms which are over the limit.
Other Requirements	Access to 'Forms Approval Purchase Orders'.
Approve Quotation Scenario	
Path	Purchase > Forms > Options > Quotations > Options > Compare > Options > Approve...
Description	Allows users to select 'approve' on a quotation comparison scenario, thereby making it available for possible selection.
Approve Requisition Form Beyond Budget Control Limit	
Path	Purchase > Forms
Description	When budget control limits are in place, flagging this setting allows users to bypass budget value limits and warnings defined against a budget group and approve requisition forms which are over the limit. Access to 'Forms Approval Requisition Forms'.
Contract Approval	
Table	ContractApproval
Path	Purchase > Contracts > Options > Approve...
Description	Allows users to grant approval to purchase contracts.

Contract Issuing	
Table	ContractIssuing
Path	Purchase > Contracts > Options > Issue
Description	Provides the ability to issue purchase contracts.
e-Business Portal; Tamper Control	
Table	PortalTamperControl
Path	Tools > Configuration > e-Business Portals > Options > Tamper Control
Description	Provides the ability to check if an e-Business document has been tampered with. If the portal setting AddCheckSum is TRUE, then a comment used for tamper control is inserted into the document. If the result of a tamper control check is 'No CRC' or 'Tampered', then the file has been tampered with.
Other Requirements	If the portal setting AddCheckSum is FALSE, then checking for tampering is meaningless.
Edit Approved Purchase Orders	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock Approved Purchase Orders' allowing users to edit purchase orders after approval.
Edit Approved Purchase Orders Below Approval Limit	
Path	Purchase > Forms
Description	Provides the ability to edit approved purchase orders below the approval limit of the group the user belongs to. Revoking approval is not possible without ability to 'Edit Approved Purchase Orders', 'Forms Approval Purchase Orders' and 'Approve Purchase Orders Beyond Budget Control Limit'.
Edit Approved Requisition Below Approval Limit	
Path	Purchase > Forms
Description	Provides the ability to edit approved requisition forms below the approval limit of the group the user belongs to. Revoking approval is not possible without the ability to 'Edit Approved Requisition Forms', 'Forms Approval Requisition Forms', and 'Approve Requisition Forms Beyond Budget Control Limit'.
Edit Approved Requisition Forms	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock Approved Requisition Forms' allowing users to edit requisitions after approval.
Edit Exported Requisition Forms	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock Exported Requisition Forms' allowing users to edit requisition forms after export.

Edit 'Ordered' Form Fields	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock 'Ordered' Form Fields' allowing users to edit these fields after a form has been ordered.
Form Release From Contract	
Table	OrderFormReleaseContract
Path	Purchase > Forms > Options > Release from Contract
Description	Gives users the ability to release an order form from a purchase contract.
Forms Approval Purchase Orders	
Table	OrderFormApproval
Path	Purchase > Forms > Options > Approve
Description	Gives users the ability to approve queries/purchase orders, the second level of approval prior to actual purchase.
Forms Approval Requisition Forms	
Table	OrderFormApproval
Path	Purchase > Forms > Options > Approve
Description	Gives users the ability to approve requisition forms, the first level of approval, usually on-board a vessel.
Forms Convert	
Table	ConfirmConvert
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert order forms.
Forms Convert Purchase Orders	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert purchase orders.
Forms Convert Queries	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert queries.
Forms Convert Requisition Forms	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert requisition forms.
Forms Convert to Purchase Orders Active	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to an active purchase order.
Other Requirements	Edit access to the type and status of form being converted.

Forms Convert to Purchase Orders Cancelled	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a cancelled purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Filed	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a filed purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Parked	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a parked purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Split	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a split purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Active	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to an active query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Cancelled	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a cancelled query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Filed	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a filed query.
Other Requirements	Edit access to the type and status of form being converted.

Forms Convert to Queries Parked	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a parked query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Split	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a split query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Active	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to an active requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Cancelled	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a cancelled requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Filed	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a filed requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Parked	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a parked requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Split	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a split requisition form.
Other Requirements	Edit access to the type and status of form being converted.

Forms Copy	
Table	OrderFormCopy
Path	Purchase > Forms > Options > Copy
Description	Gives ability to copy order forms.
Forms Deliveries; Split	
Table	DeliveriesSplit
Path	Purchase > Forms > Options> Deliveries > Options > Line Items > Options > Split Deliveries
Description	Gives ability to split line items from one delivery to another.
Forms Print Copy Letter of Rejection	
Path	Purchase > Forms > Options > Print > Printer Form (Copy) > Letter of Rejection
Description	Provides ability to print copies of Letters of Rejection for quotations which were not accepted by the buyers.
Forms Print Copy Purchase Orders	
Path	Purchase > Forms > Options > Print > Printed Form (Copy) > Form/Reclamation Claim
Description	Provides ability to print copies of purchase orders and reclamation claims.
Forms Print Copy Queries	
Path	Purchase > Forms > Options > Print > Printer Form (Copy) > Form
Description	Provides ability to print copies of queries.
Forms Print List Letter of Rejection	
Path	Purchase > Forms > Options > Print > List > Letter of Rejection
Description	Provides ability to print a list of Letters of Rejection for quotations that have not been accepted by the buyers.
Forms Print List Purchase Orders	
Path	Purchase > Forms > Options > Print > List
Description	Gives ability to print a list of purchase orders.
Forms Print List Queries	
Path	Purchase > Forms > Options > Print > List
Description	Gives ability to print a list of queries.
Forms Print List Requisition	
Path	Purchase > Forms > Options > Print > List
Description	Gives ability to print a list of requisition forms.

Forms Print Original Letter of Rejection	
Path	Purchase > Forms > Options > Print > Printed Form (Original) > Letter of Rejection
Description	Provides ability to print originals of Letters of Rejection for quotations that have not been accepted by the buyers. Printing an original Letter of Rejection populates the 'Rejected' date field (Quotation.RejectedDate) in the History section of the Quotation header. It is a good idea to enter the name of the person rejecting the quote using the drop-down list beside the date prior to printing.
Forms Print Original Purchase Orders	
Path	Purchase > Forms > Options > Print > Printed Form (Original) > Form/Reclamation Claim
Description	Provides ability to print original purchase orders and reclamation claims. Printing an original purchase order populates the 'Ordered' date field (OrderForm.OrderedDate) in the History section of the Form header. Printing an original reclamation claim populates the 'Claims Date' field (QualityCheckLog.ClaimDate) on the line item's Quality Check tab.
Forms Print Original Queries	
Path	Purchase > Forms > Options > Print > Printed Form (Original) > Form
Description	Provides ability to print original queries. Printing an original query populates the 'Sent' date field (Quotation.SentDate) in the History section of the Quotation header.
Forms Print Requisition	
Path	Purchase > Forms > Options > Print
Description	Gives users access to print originals or copies of requisition forms. Since requisitions are not considered legal documents in AMOS and no fields are populated when the forms are printed, there are not separate options to print originals and queries.
Forms Printing	
Table	OrderFormPrint
Path	Purchase > Forms > Options > Print
Description	Gives users access to the Print option for Order Forms.
Other Requirements	Access to individual print functions to allow printing.
Forms Quotation Select	
Path	Purchase > Forms > Options > Quotations > Options > Select
Description	Gives users the opportunity to select the quotation with the best combination of prices and delivery times.

Forms Receive	
Table	OrderFormReceipt
Path	Purchase > Forms > Options > Receive
Description	Gives users the ability to receive purchase orders.
Forms; Allow Spot Buy Off Contracts	
Path	Purchase > Forms > Options > Line Items > New
Description	Gives ability to select both contracted and noncontracted stock items on order forms not based upon a contract. If you only want contracted stock items to be purchased on order forms that have a contract applied to them, then do not allow this access. Order forms that are based upon a contract typically allow only contracted stock items to be selected.
Order Lines; Sort Items	
Path	Purchase > Forms > Options > Line Items > Options > Sort Items
Description	Gives ability to sort order lines.
Propose Quotation Scenario	
Path	Purchase > Forms > Options > Quotations > Options > Compare > Options > Propose...
Description	Allows users to select 'propose' on a quotation comparison scenario, thereby making it available for possible approval and selection.
Quotation Compare, Line Quantity	
Table	QuantityRequest
Path	Purchase > Forms > Options > Quotations > Options > Compare > Award *button*
Description	Allows access to the Specify Quantity dialog in the Quotation Compare window, for awarding a quantity of a line item to a particular vendor.
Other Requirements	Flag 'Awarded Quantity' on the Configuration tab to show the button in the Compare tab.
Select Quotation Scenario	
Path	Purchase > Forms > Options > Quotations > Options > Compare > Options > Select...
Description	Allows users to 'select' a quotation comparison scenario.
View Price information; Forms Receive	
Path	Purchase > Forms > Options > Receive
Description	Provides the ability to view the price and currency when receiving forms.
View Price information; Line Items	
Path	Purchase > Forms > Options > Line Items
Description	Provides the ability to view the line item price and currency.

View Purchase History	
Table	SparePartLogPurchase
Path	Stock > Stock Items/Stock Types > Options > Purchase History Purchase > Forms > Options > Line Items > Options > Purchase History
Description	Gives access to open and view the records in the Purchase History window.

Functions - Financial

Allow to Update Order Form Budget from Voucher	
Path	Financial > Voucher
Description	Gives access to open a lookup from the 'Budget Code' field on the Voucher window. Budget codes are usually inherited read-only from the order form the voucher belongs to. Access to the lookup gives the user ability to override the order form budget from the Voucher window.
Budget Approve Codes	
Path	Financial > Budget > Options > Convert
Description	Gives users the ability to convert budget codes to an 'Approved' status.
Budget Breakdown	
Tables	BudgetBreakdownPurchase/Stock/Maintenance
Path	Financial > Budget > Options > Breakdown
Description	Gives access to the three (Maintenance, Stock and Purchase, according to budget class) Budget Breakdown windows.
Budget Convert Codes	
Table	BudgetConvert
Path	Financial > Budget > Options > Convert
Description	Gives users the ability to convert budget codes from a 'Preliminary' to a 'Parked' status and vice-versa, but not to an 'Approved' status. Execute access on 'Budget Approve Codes' is required to convert to approved status.
Other Requirements	Edit access to the Budget register to use this option.
Budget Copy	
Table	BudgetCodeCopy
Path	Financial > Budget > Options > Copy
Description	Provides ability to copy budget codes, most often used to generate new budget codes for the upcoming financial year based on the previous year's budget codes.
Budget Modify Approved Codes	
Path	Financial > Budget
Description	Provides ability to modify information on 'Approved' budget codes.

Budget Prognosis Approve	
Path	Financial > Budget > Options > Prognosis > Options > Convert
Description	Gives users the ability to convert budget code prognoses to an 'Approved' status.
Budget Prognosis Convert	
Table	BudgetPrognosisConvert
Path	Financial > Options > Prognosis > Options > Convert
Description	Gives users the ability to convert budget code prognoses from a 'Preliminary' to a 'Parked' status and vice-versa.
Budget Prognosis Modify Approved	
Path	Financial > Budget > Options > Prognosis
Description	Gives ability to edit information on 'Approved' budget code prognoses.
Budget Recalculate	
Table	BudgetCodeRecalc
Path	Financial > Budget > Options > Copy
Description	Gives ability to recalcuate the Committed, Paid and Total columns in the event that the existing amounts are incorrect.

Functions - Quality

Incident Report Close	
Path	Quality > Incidents > Options > Close
Description	Activates the option to close currently open incident reports.
Incident Report Reopen	
Path	Quality > Incidents > Options > Reopen
Description	Activates the option to reopen incident reports which have already been closed.
Manual Export	
Table	QSManualExport
Path	Quality > Manuals > Options > Export...
Description	Gives the ability to export a manual and choose the location for it.

Procedure Document	
Table	ProcedureDocument
Path	Quality > Procedures
Description	Allows a user without any access to the Procedures register, to open the Procedures window for read-only viewing of the currently issued revision of each procedure document. There is no Revisions tab on the window and the Documents tab only displays the actual document itself and no list of revisions or options to compare. Jobs, Manuals and Conventions, References and Attachments are listed in read-only format and no record of distribution is available.
Other Requirements	To maintain the read-only procedure document view, do not assign any access to the Procedures register itself.
Procedure Print	
Table	PrintProc
Path	Quality > Procedures > Print *button*/File > Print
Description	Gives the ability to select and print out procedure documents.
Trigger Jobs	
Table	TriggerJob
Path	Quality > Trigger Jobs
Description	Gives the ability to trigger jobs and so create quality work orders for procedure jobs linked to triggers.
Work Order Generation	
Table	QWOGeneration
Path	Quality > Generate Work Orders
Description	Gives the ability to generate the first quality work orders for periodic procedure jobs.

Functions - Voyage Management

Add Cargo to Voyage	
Path	Voyage > Cargoes > Options > Assign Cargo to Voyage
Description	Allows users to add a cargo registration to a defined voyage, in the Cargoes window.
Change Port Call Status	
Path	Voyage > Voyages > Port Calls *tab* > Details *button* > Options > Change Port Call Status
Description	Allows users to change the status on the port call selected in the Port Calls tab on the Voyages window.
Change Voyage Status	
Path	Voyage > Voyages > Options > Change Voyage Status
Description	Allows users to change the status on a voyage selected in the Voyages window.

Create Planned Cargo Operation	
Path	Voyage > Voyages > Port Calls *tab* > Details *button* > Cargo *tab* > Report Cargo *button* > (Report Cargo window) New Cargo Operations *button*
Description	Allows users to access and create planned cargo operations.
Create Voyage from Cargo	
Path	Voyage > Cargoes > Options > Voyage from Cargo
Description	Allows users to create a voyage from a defined cargo, in the Cargoes window.
Remove Cargo	
Path	Voyage > Cargoes > Options > Remove Cargo from Voyage
Description	Allows users to remove a cargo registration from a defined voyage, in the Cargoes window.
Tender, Notice of Readiness	
Path	Voyage > Voyages > Port Calls *tab* > Details *button* > Cargo *tab* > Tender NoR *button*
Description	Allows access to the Tender, Notice of Readiness report.

Functions - Personnel

Add and Remove Employee Documents	
Path	Crewing > Employee
Description	Activates the New and Delete buttons in the relevant tabs to allow users to add and remove employee documents like medical certificates, passports, licenses, etc.
Other Requirements	Adding/Removing medical documents (Medical Info. tab) requires Insert/Delete access to the 'Employee Medical' register. Adding/Removing licences and certificates (Educ./Lic. tab) and passports or visas (Pass./Visa tab) requires Insert/Delete access to the 'Employee Licenses' register.
Check Expiry	
Table	DocumentExpiry
Path	Crewing > Expired > Licenses/Medical Certificates/ID Books/Services
Description	Gives access to the four Document Expired windows.
Close Period	
Table	ClosePeriod
Paths	Crewing > Payroll > Close Period Crewing > Employee > Options > Close Period
Description	Lets users close the current payroll period.

Generate and Confirm Service	
Tables	NewService; CrewChange
Paths	Crewing > Employee > Service *tab* > Generate *button* Crewing > Planning > View Employee/Rank Plan > Options > Generate Service
Description	Allows access to the Generate Service dialog.
List Unplanned Crew	
Path	Crewing > Employee > *filter*
Description	Allows access to the 'Unplanned Crew' checkbox on the bottom right corner of the Employee window filter. Flagging it will include crew members without a service plan in place, in the filtered Employee window.
Run Payroll	
Path	Crewing > Employee > Options > Run Payroll; Crewing > Payroll > Worksets > Options > Run Payroll
Description	Activates the option to run payroll for selected employees and worksets.

Functions - Mobile

Mobile Access	
Description	Gives users the ability to access AMOS Mobile on the designated handheld device. Mobile devices are listed at Tools > Mobile > Mobile Registration.

Reports And Modules

For granting rights to run standard reports and user-defined reports and external modules.

It's possible to define new access modules and add external reports and programs to them. See CHAPTER 22 for more information.

Reports/Modules - Common

Address Reports	
Path	Tools > Reports > Address Reports
Description	Gives the ability to run all standard reports in the Address Reports folder.
MARPOL	
Path	Tools > Reports > MARPOL Reports
Description	Gives the ability to run all standard reports in the MARPOL Reports folder.

Reports/Modules - Maintenance

Bureau Veritas, Audit Trail Reports	
Path	Tools > Reports > Bureau Veritas - Audit Trail Reports
Description	Gives the ability to run all standard reports in the Audit Trail Reports folder.

Component Reports	
Path	Tools > Reports > Component Reports
Description	Gives the ability to run all standard reports in the Component Reports folder.
History Reports	
Path	Tools > Reports > History Reports
Description	Gives the ability to run all standard reports in the History Reports folder.
Jobs	
Path	Tools > Reports > Jobs Reports
Description	Gives the ability to run all standard reports in the Jobs Reports folder.
Maintenance Reports	
Path	Tools > Reports > Maintenance Reports
Description	Gives the ability to run all standard reports in the Maintenance Reports folder.

Reports/Modules - Stock

Stock Items	
Path	Tools > Reports > Stock Items Reports
Description	Gives the ability to run all standard reports in the Stock Items Reports folder.

Reports/Modules - Purchase

Custom Clearance	
Path	Tools > Reports > Custom Clearance Reports
Description	Gives the ability to run all standard reports in the Custom Clearance Reports folder.
Forms and Requisitioning	
Path	Tools > Reports > Forms and Requisitioning Reports
Description	Gives the ability to run all standard reports in the Forms and Requisitioning Reports folder.
Transport Documents	
Path	Tools > Reports > Transport Documents Reports
Description	Gives the ability to run all standard reports in the Transport Documents Reports folder.

Reports/Modules - Financial

Budget Reports	
Path	Tools > Reports > Budget Reports
Description	Gives the ability to run all standard reports in the Budget Reports folder.

Reports/Modules - Quality

Emergency Response System	
Path	Tools > Reports > Emergency Response System
Description	Gives the ability to run all standard reports in the Emergency Response System folder.
Non-Conformities	
Path	Tools > Reports > Non Conformities
Description	Gives the ability to run all standard reports in the Non Conformities folder.
Quality Procedures	
Path	Tools > Reports > Quality Procedures
Description	Gives the ability to run all standard reports in the Quality Procedures folder.

Reports/Modules - Personnel

Employee Reports	
Path	Tools > Reports > Employee Reports
Description	Gives the ability to run all standard reports in the Employee Reports folder.
Personnel Office Reports	
Path	Tools > Reports > Personnel Office Reports
Description	Gives the ability to run all standard reports in the Personnel Office Reports folder.
Personnel Onboard Reports	
Path	Tools > Reports > Personnel Onboard Reports
Description	Gives the ability to run all standard reports in the Personnel Onboard Reports folder.

Reports/Modules - Self Assessment

Statistics N/A	
Path	Tools > Reports > Statistics Reports
Description	Gives the ability to run all standard reports in the Statistics Reports folder.

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