

AMOS Business Suite

Version 10.0.00

Personnel User Guide

Revision 1, July 2014

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Your AMOS Support Network

An up-to-date list of email addresses and telephone numbers is available on the Contact Support page of our website, at www.spectec.net

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Additional Manuals

For additional copies of user guides or installation manuals, please contact your local sales office.

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:

documentation@spectec.net

CHAPTER 1 General Information

This User Guide is for users of the AMOS Personnel module version 10.0.00. This document is written from the point of view that the reader understands the requirements of the job and now needs to acquire an understanding of how to use AMOS Personnel in fulfilling those requirements.

AMOS Personnel is module of the AMOS Business Suite, and is an onboard tool for crew management. The basic crew details will normally be entered and administered from a shore-based facility and exported to the company's vessels using AMOS Replication. The crew details can be corrected or modified by either ship or shore-based personnel, and these alterations will be updated during the export/import function of AMOS Replication.

1.1 Who Should Read The User Guide?

This User Guide is for people using an AMOS Personnel system that is already installed and running. The Payroll section assumes the user has a general knowledge of payroll principles and terminology.

This manual describes all the available functions. The actual functions available in your system will depend on your license.

No previous knowledge of AMOS Personnel or Windows is required, but if you are completly new to computers, you may prefer to start with the basic documentation for your PC and windows.

1.2 How This User Guide Is Organised

Chapter 2 gives you an overview of the common features and principles within the AMOS Business Suite.

The main features for Employee management, Planning, Payroll and On Board functionality are contained in Chapters 3, 4 and 5.

Chapter 6 contains a list of the Personnel and Payroll registers.

1.3 Related Documentation

The *AMOS Business Suite Installation Guide* contains information on how to install the application.

The *AMOS Business Suite Reference Manual* contains information about the application Framework.

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.

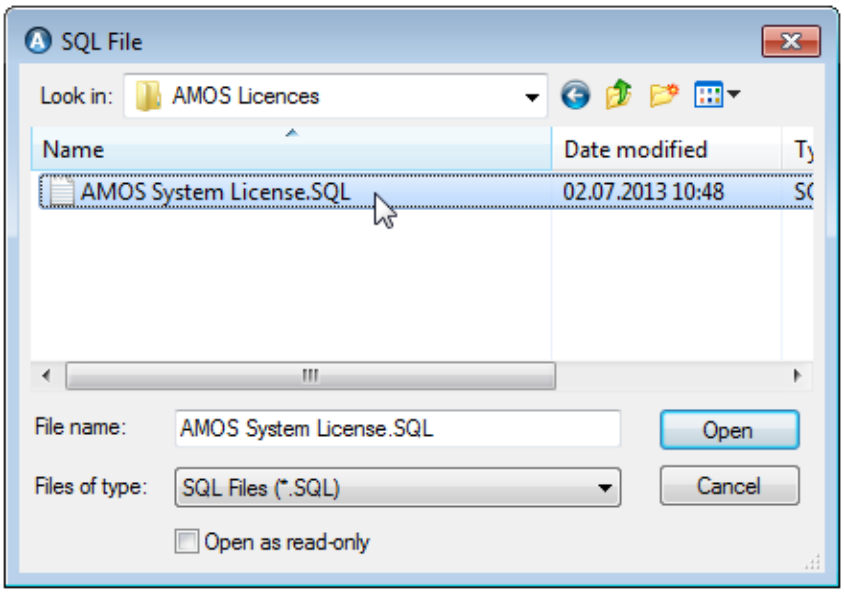
NOTE: Your organisation may use one or more additional security options available within AMOS such as complex passwords, maximum password age, minimum password length, maximum number of logon attempts and/or restriction of recently used passwords when registering a new one. Ask your system administrator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

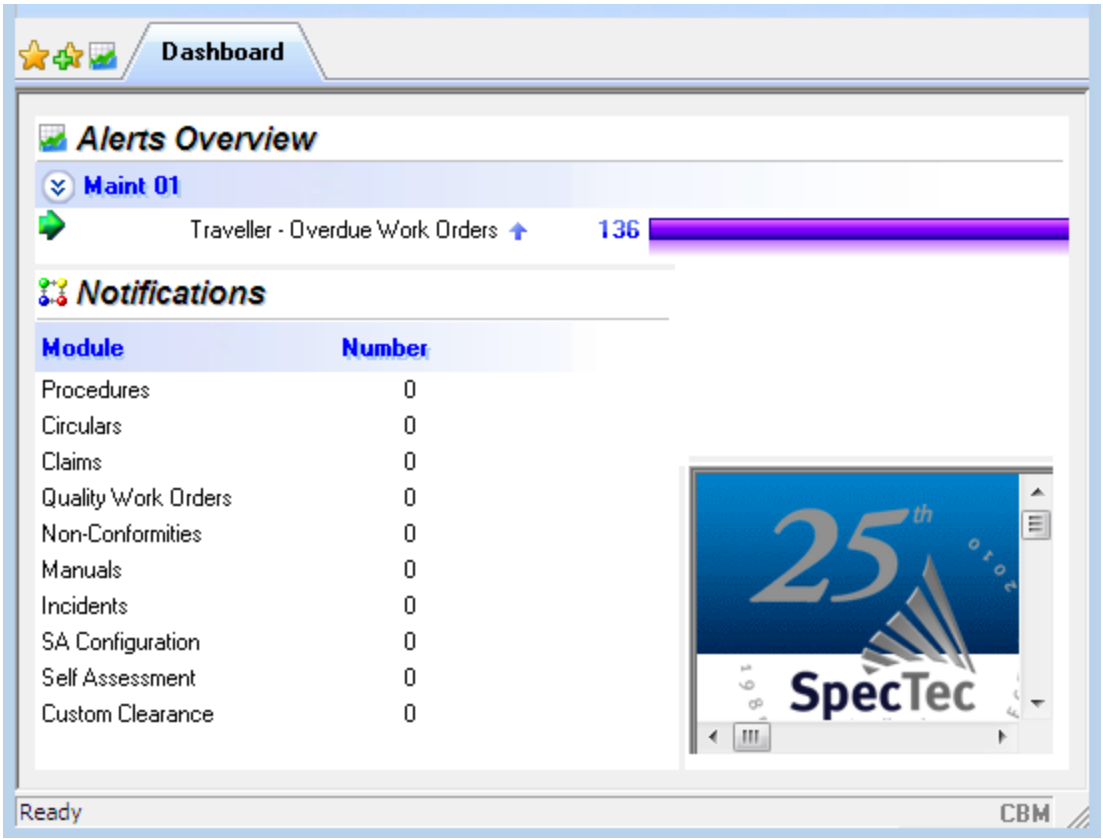
AMOS Business Suite opens to a customisable Home Page, or Dashboard. You can add convenient information to the dashboard like alerts and work flow notifications.

To switch the Dashboard on and off:

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

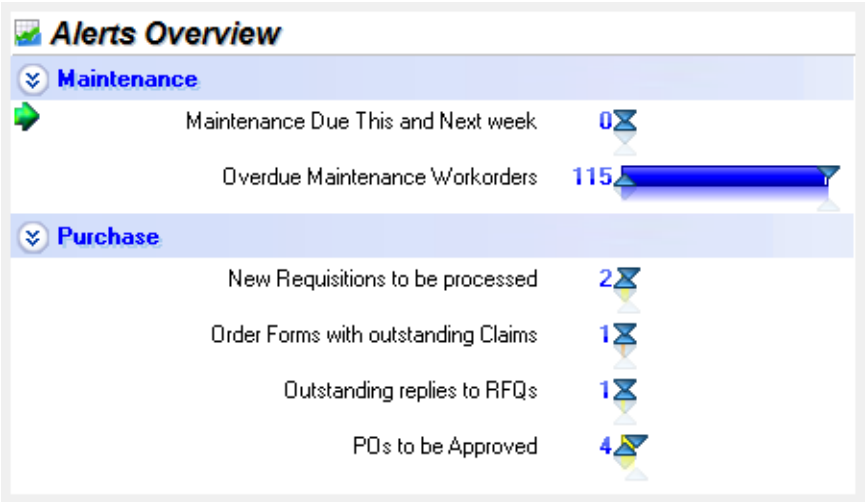


2. Check or clear the **Enable Dashboard** checkbox.
3. Click **OK** to close the window and apply your setting.



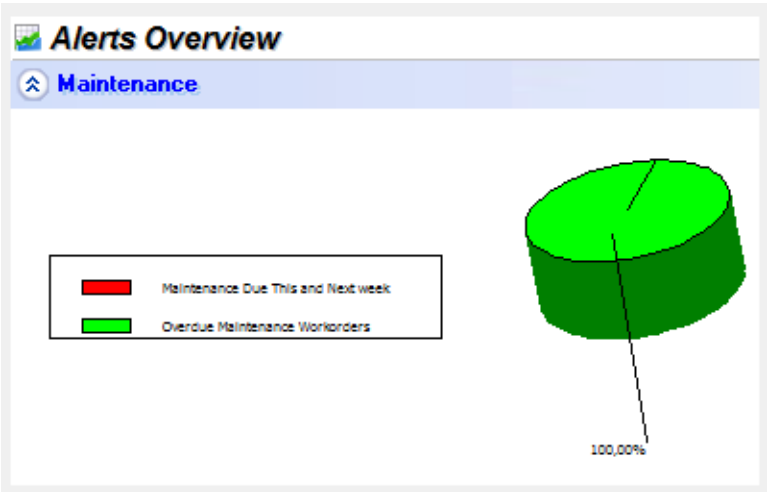
2.2.1 Alerts Overview

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.



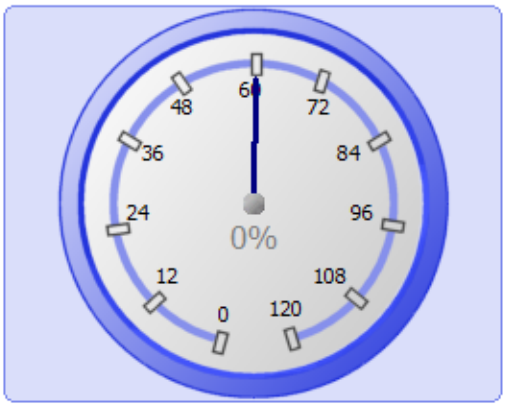
Double-clicking an alert opens the relevant window with the list of records. Right-clicking in the Alerts Overview opens a pop-up menu. You can choose to **Refresh** the Alerts, **Open** the selected one, or **Print** the contents of the Alerts Overview.

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:

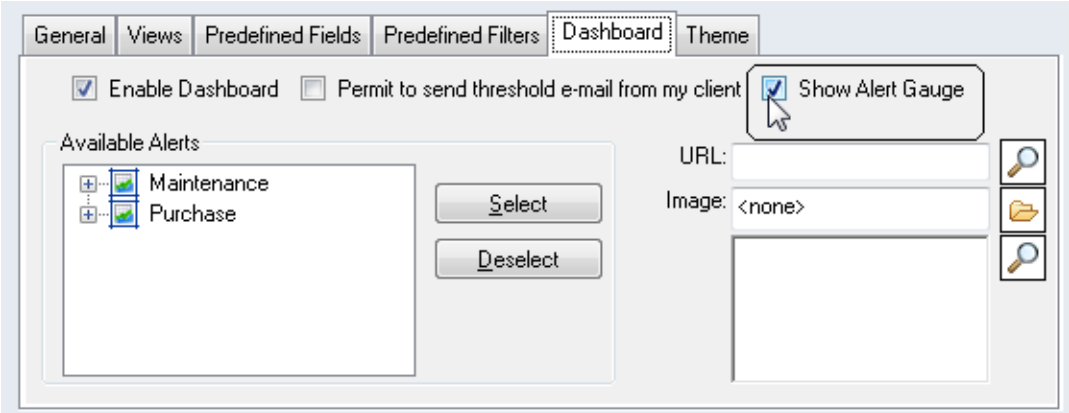


Alerts can also be configured with a set threshold indicating the maximum acceptable value on the given alert. If this threshold is crossed the alert bar and label will change colour and AMOS can send an email to the responsible users.

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.

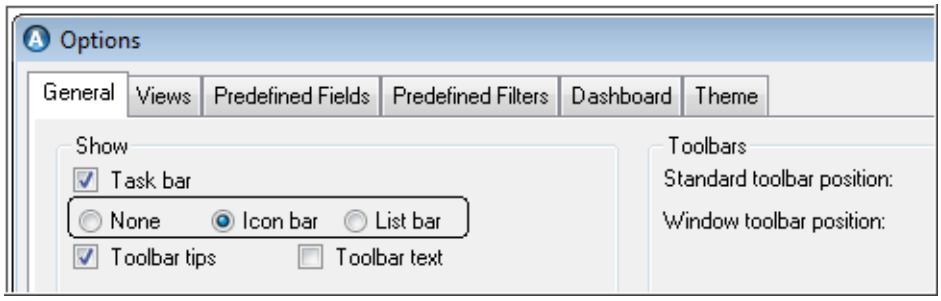
To set the number of seconds between checks for unacknowledged notifications:

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

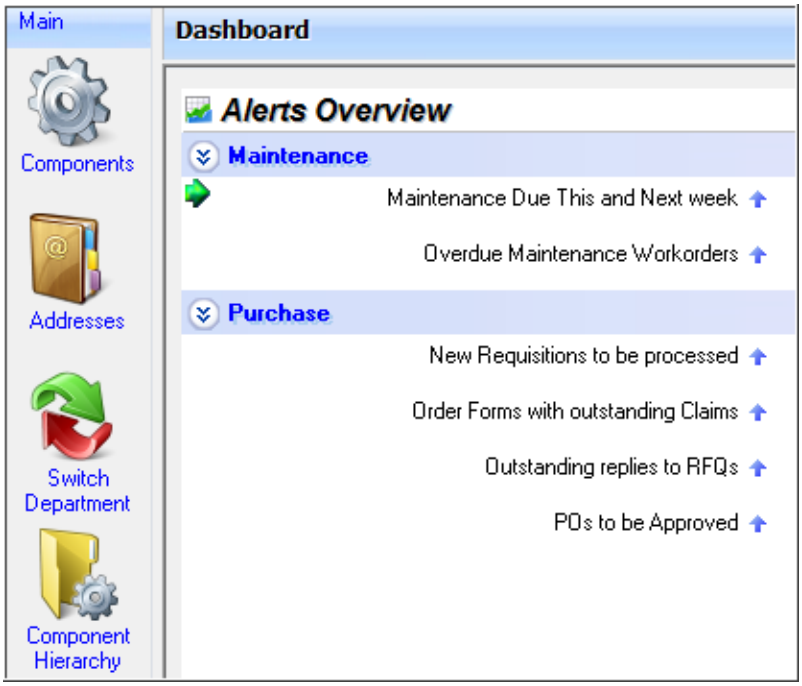
You can choose to have an Icon bar or a List bar present:

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.

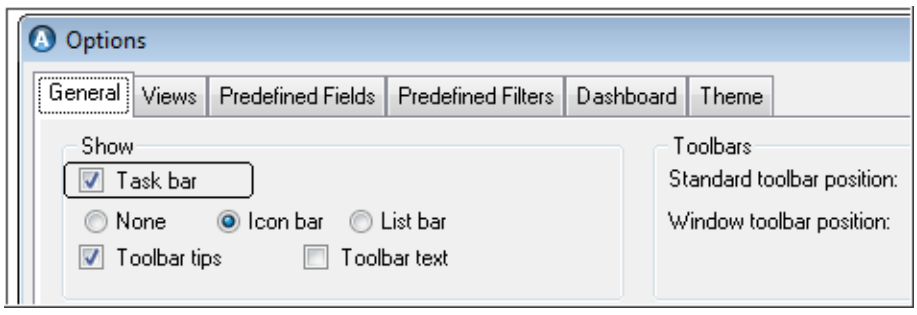
The List bar/Icon bar appears on the left hand side of the Dashboard and contains shortcuts to main areas of the application:



Once enabled, it is visible from any window.

You can also show or hide the task bar:

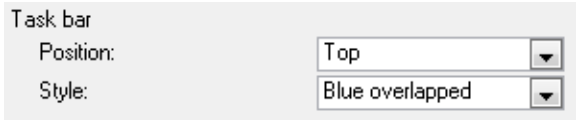
1. Go to **Tools >Options** and check or clear the **Task Bar** checkbox in the General tab:



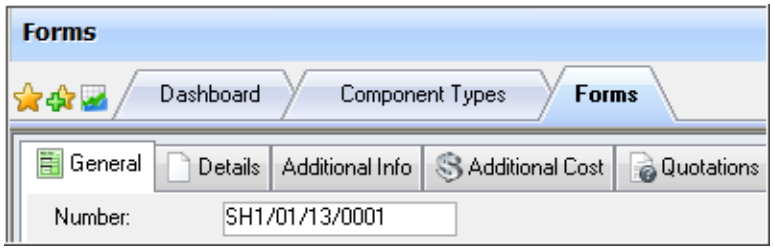
2. Click **OK** to exit the dialog with your setting applied.

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

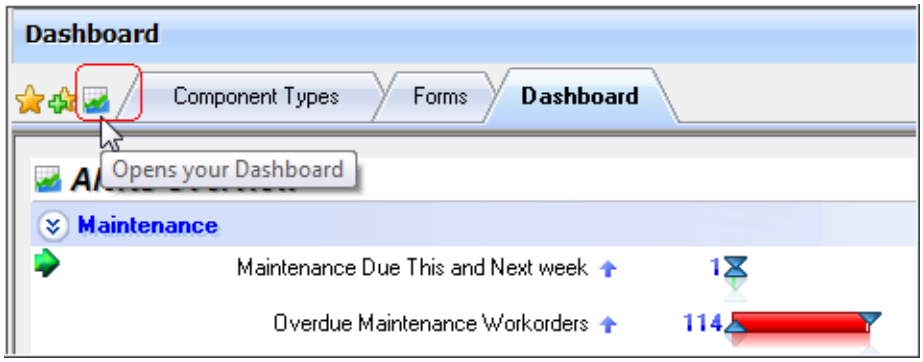
1. Go to **Tools > Options** and switch it on in the General tab.
2. Open the Theme tab and select a **Position** and **Style** for the task bar:



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:

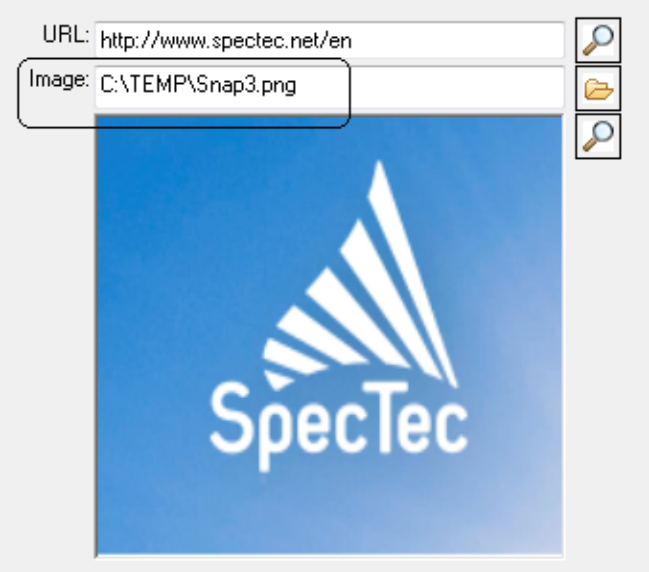
   move the webpage to the right side lengthwise, or

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.

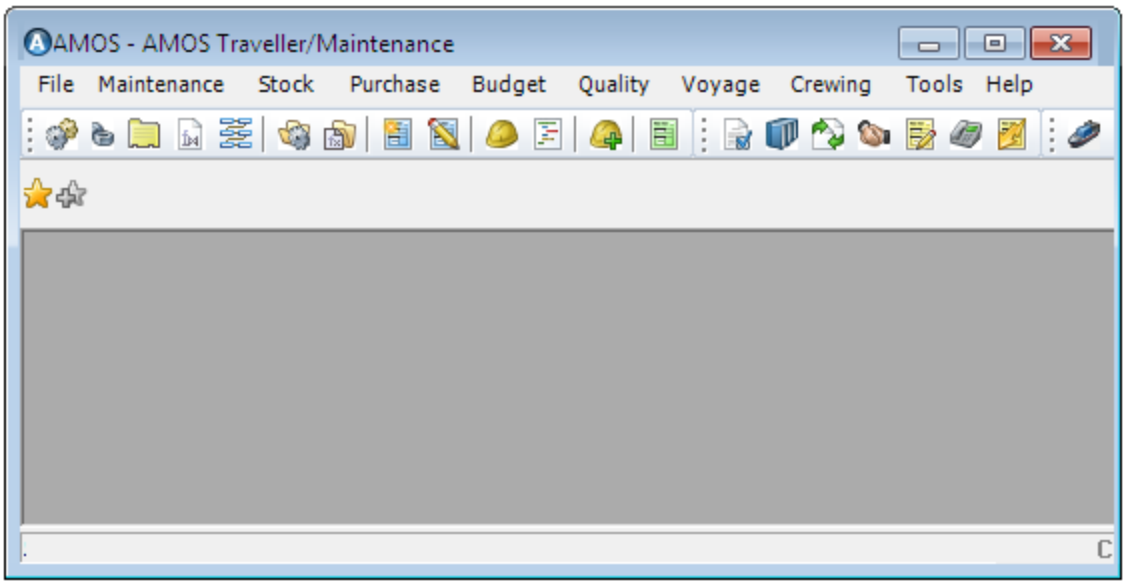
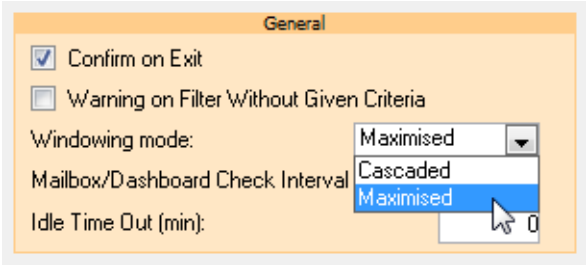


Figure 2 The AMOS Business Suite opening window

To set the default window opening mode:

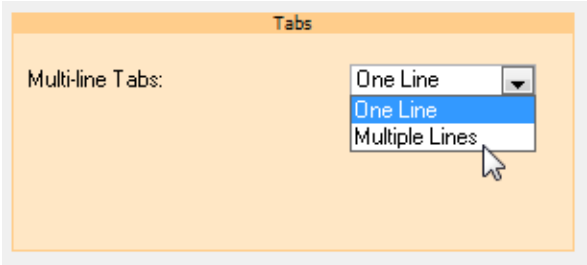
1. Go to **Tools > Options**.
2. Select 'Maximised' or 'Cascaded' from the **Windowing mode** drop-down on the General tab:



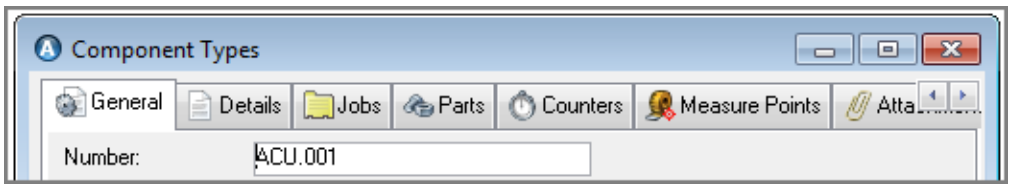
3. Click **OK**.

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

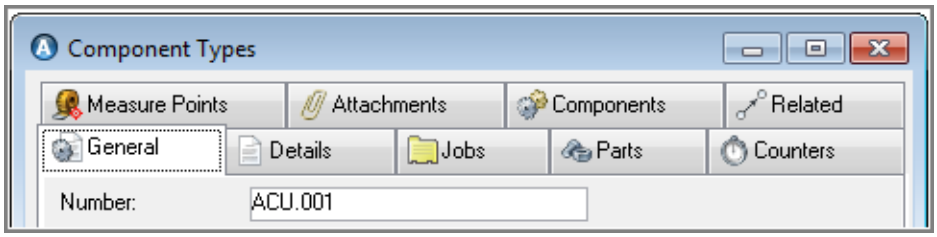
1. Go to **Tools > Options**.
2. Select a tab behaviour from the **Multi-line Tabs** field on the General tab:



'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.

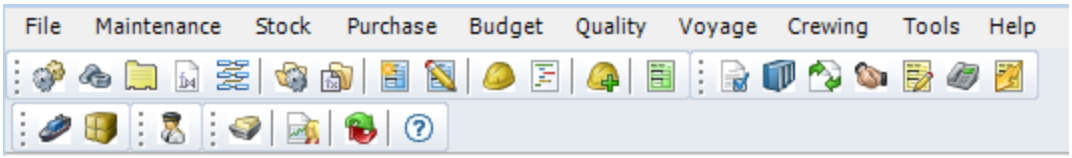


Figure 3 Navigation Bars

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.

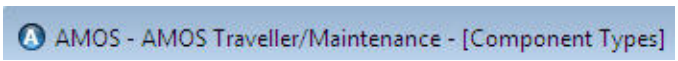


Figure 4 Window Title Bar

2.3.2 The Menu Bar

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

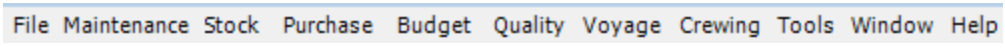


Figure 5 Menu Bar

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.

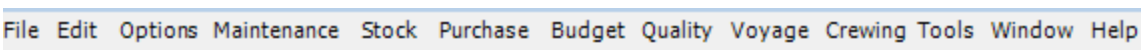
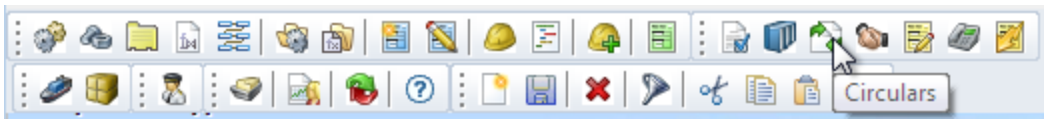


Figure 6 Extended Menu Bar

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:

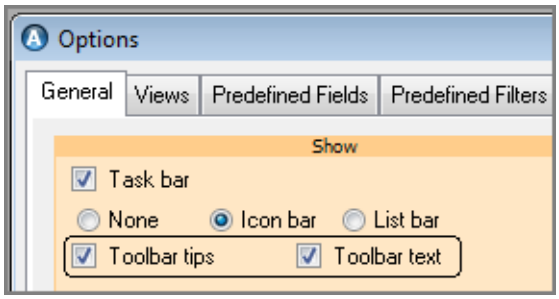


To set the toolbar's position:

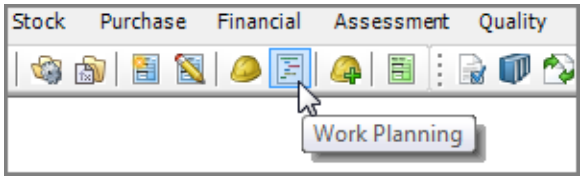
1. Go to **Tools > Options**.
2. Select an option - top, bottom, left, right or hidden - in the **Standard toolbar position** field on the General tab.
3. Click **OK**.

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:

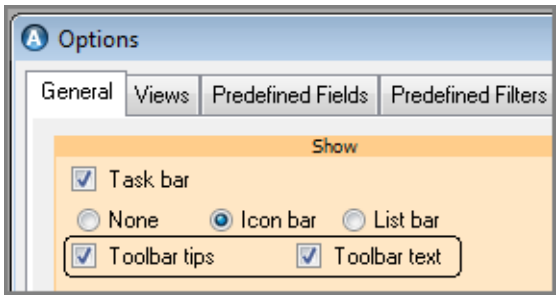
1. Go to **Tools > Options**.
2. Select an option - top, bottom, left, right or hidden - in the **Window toolbar position**

field on the General tab.

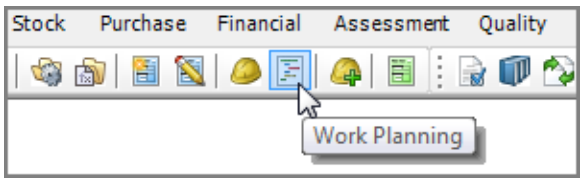
3. Click **OK**.

To activate toolbar tips and/or toolbar text:

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**.

2.3.5 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.

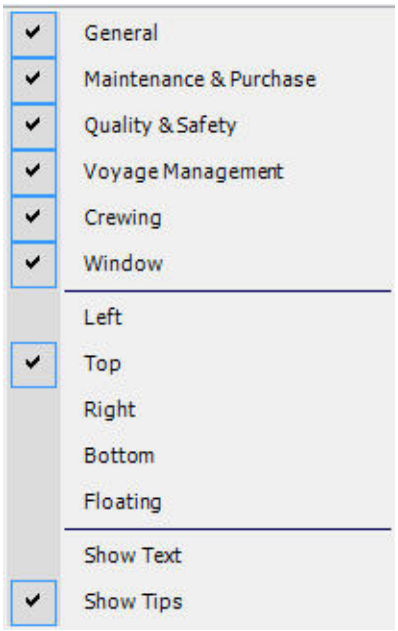


Figure 7 Customise Toolbar Menu

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**.

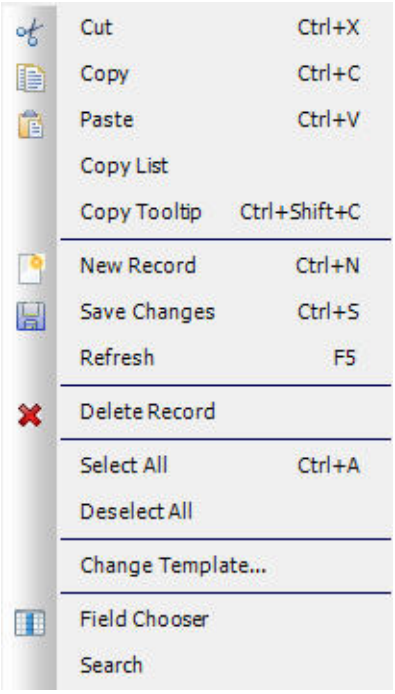


Figure 8 A Typical Edit Menu with Shortcut Keys

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

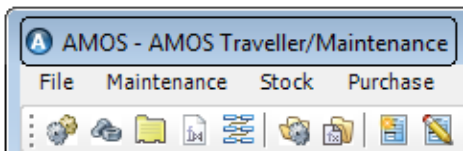
The AMOS Business Suite contains functions to handle complex organisations. You can divide your organisation into installations (any office or site where AMOS is installed) and divide these installations into departments. To view your company's list of defined installations and departments, select **File > 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

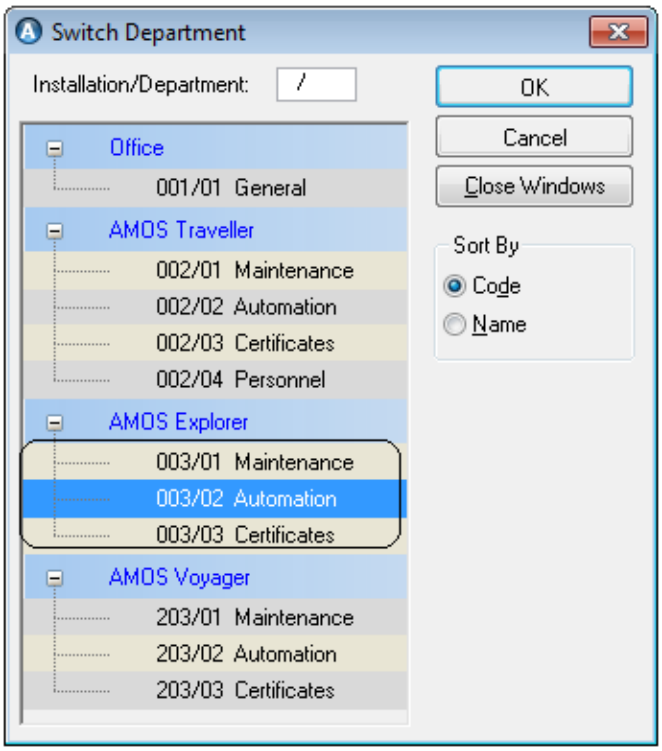
The top line of the AMOS window shows your current Installation/Department:



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;

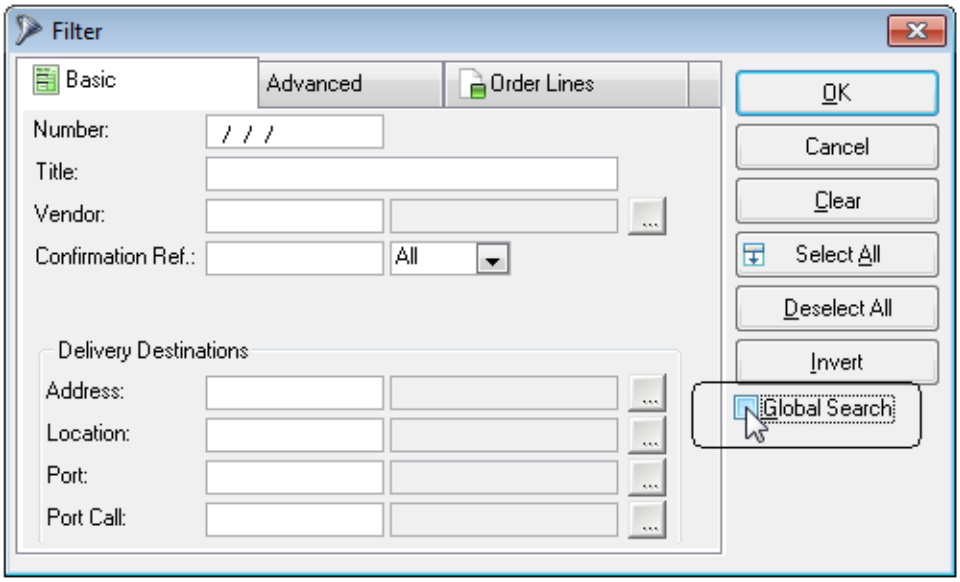
One Buyer is responsible for purchasing consumables on all vessels;

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.

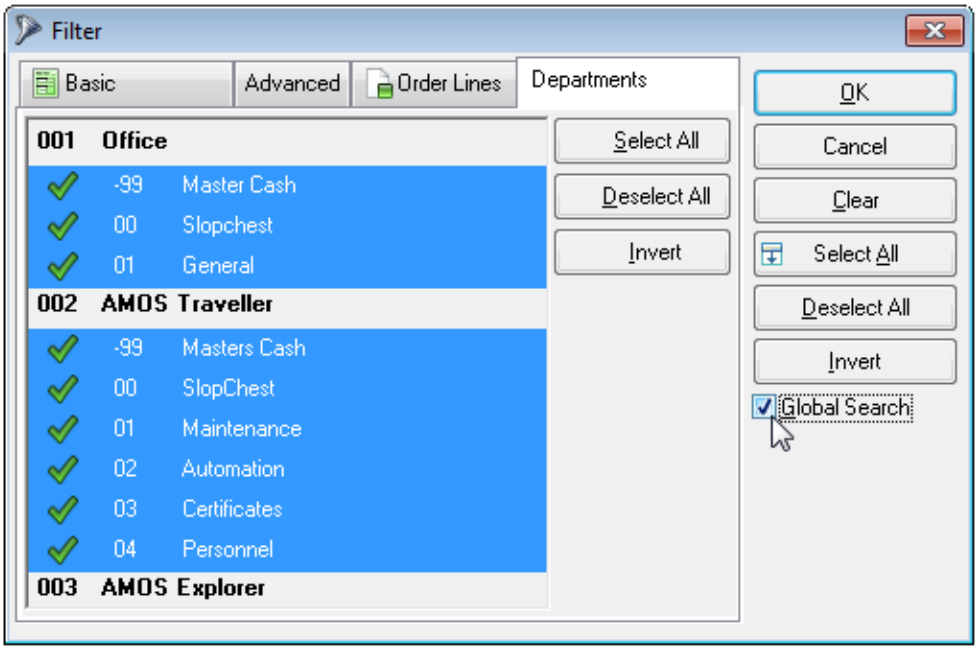
To activate global searching:

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

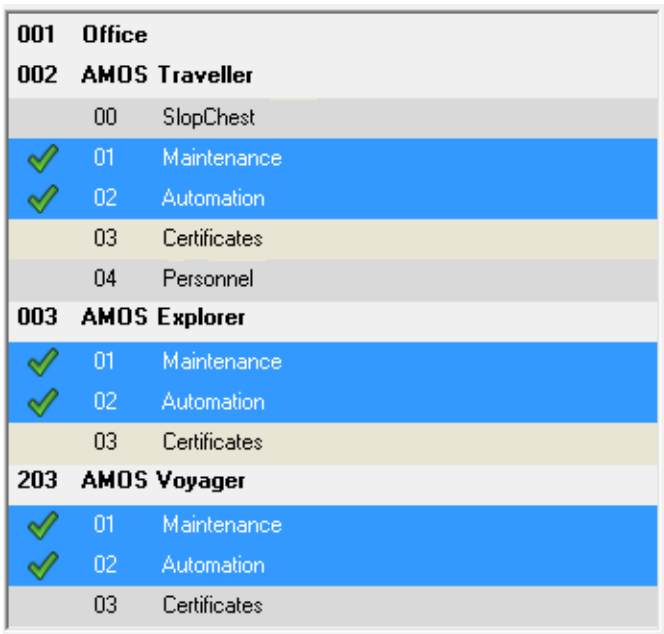


2. The Departments tab will appear in the filter, showing all the installations/departments that you have access to:

[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.



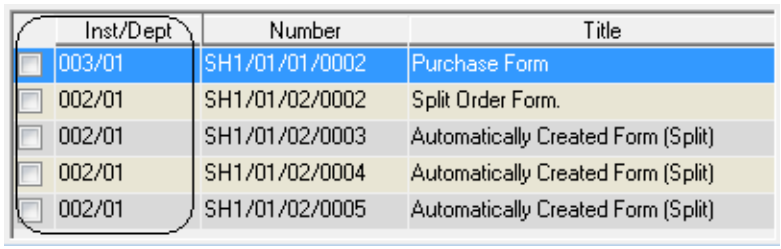
3. Flag installations/departments you want to search in the Departments tab:



> **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.

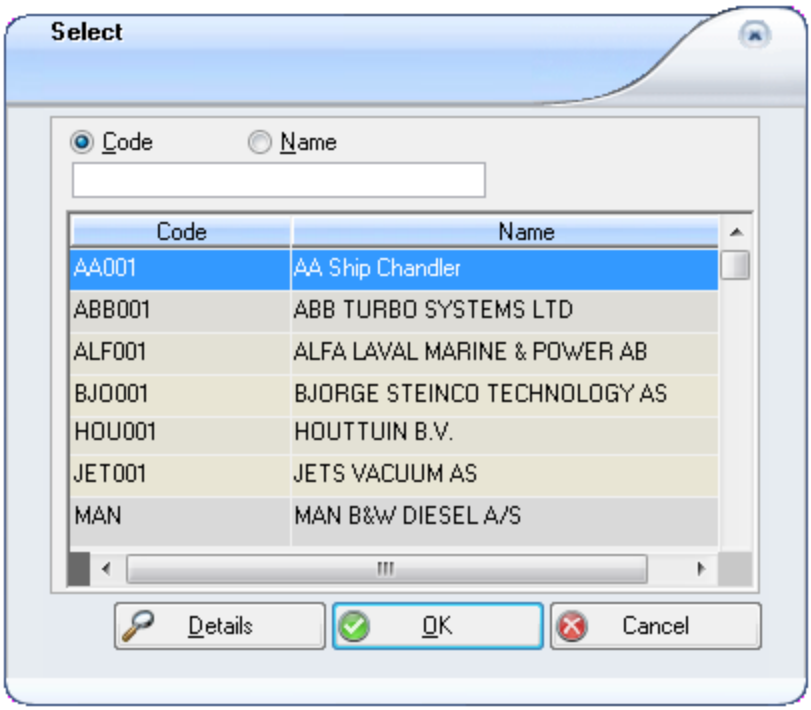
The **Inst/Dept** column is added to the list part of a window in Global mode, showing you where each record came from:



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.

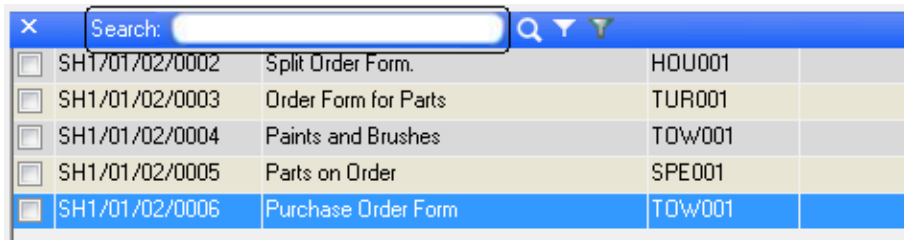
> **TIP**
> If you know the starting letter or number of the record you are searching for you can enter it into the field before clicking the lookup button. This restricts the look-up list to records beginning with the letter/number you entered.

2.4.5 Searching Inside A Window

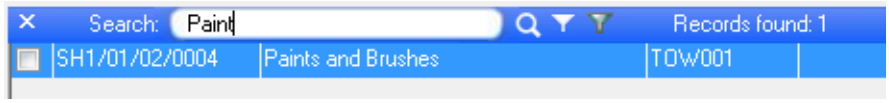
Whether you have already filtered a window or not, you can search the listed records:

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

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



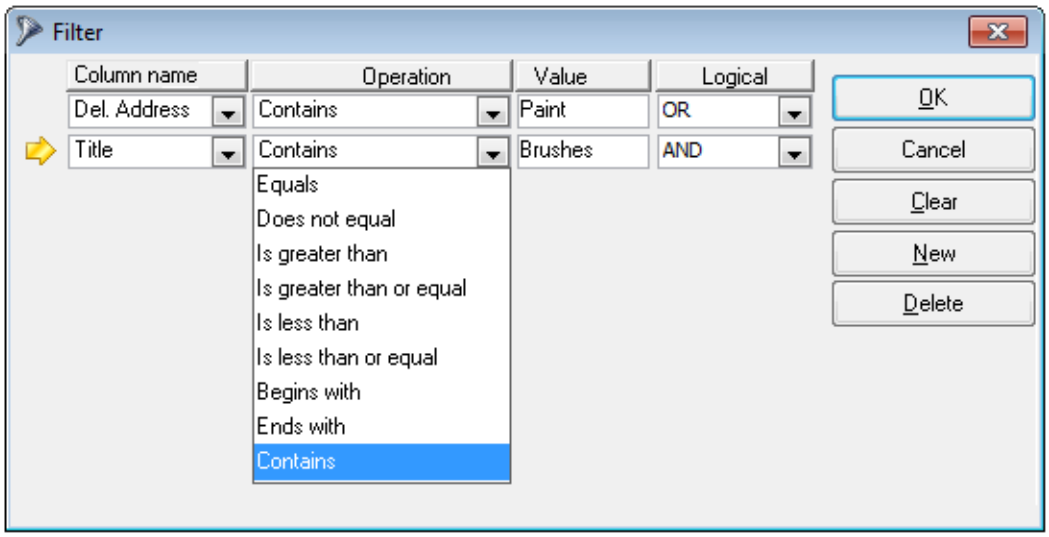
2. Type some text into the field and press **Enter** or click the magnifying glass icon to return results:



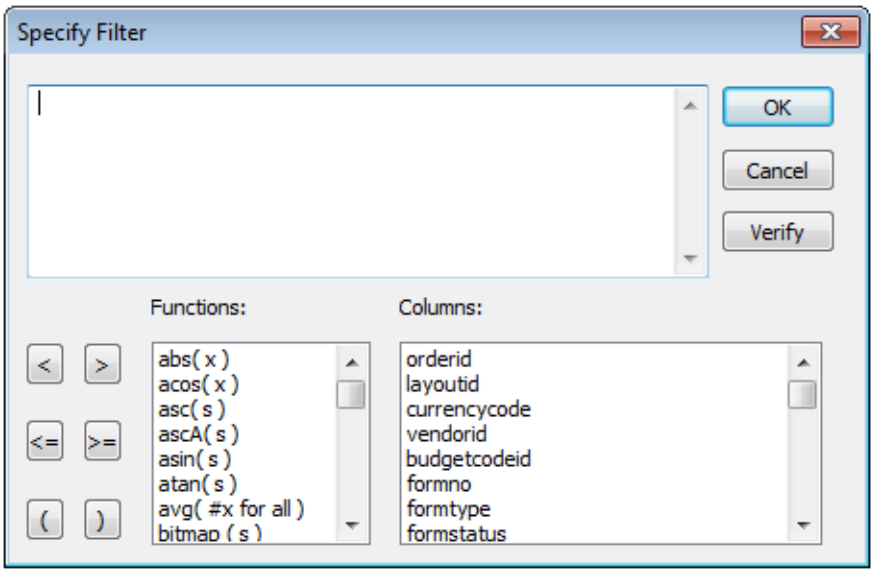
3. Clear the **Search** field and hit **Enter** again to go back to the previous full list.

TIP

Click the white filter button to open an expanded search window:

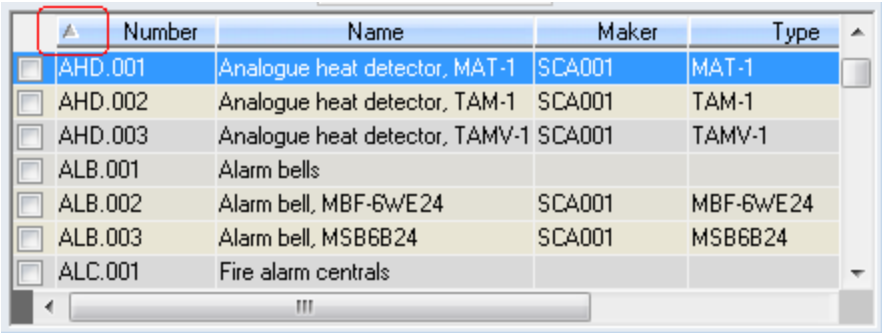


Or, click the shaded filter button to open an advanced search window:



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:



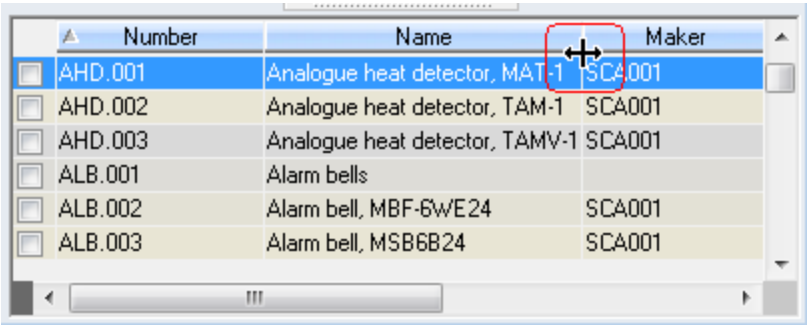
Number	Name	Maker	Type
AHD.001	Analogue heat detector, MAT-1	SCA001	MAT-1
AHD.002	Analogue heat detector, TAM-1	SCA001	TAM-1
AHD.003	Analogue heat detector, TAMV-1	SCA001	TAMV-1
ALB.001	Alarm bells		
ALB.002	Alarm bell, MBF-6WE24	SCA001	MBF-6WE24
ALB.003	Alarm bell, MSB6B24	SCA001	MSB6B24
ALC.001	Fire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

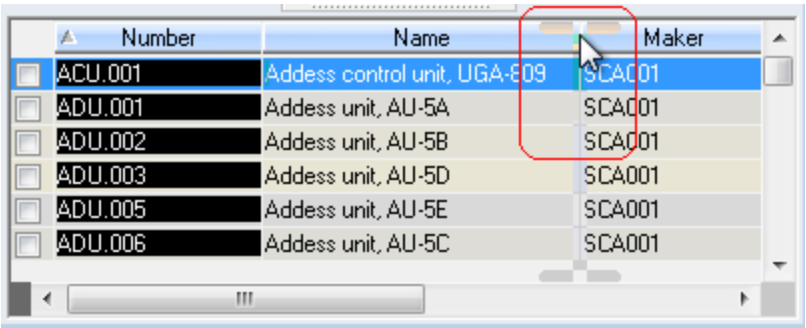


Number	Name	Maker
AHD.001	Analogue heat detector, MAT-1	SCA001
AHD.002	Analogue heat detector, TAM-1	SCA001
AHD.003	Analogue heat detector, TAMV-1	SCA001
ALB.001	Alarm bells	
ALB.002	Alarm bell, MBF-6WE24	SCA001
ALB.003	Alarm bell, MSB6B24	SCA001

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:



Number	Name	Maker
ACU.001	Addess control unit, UGA-809	SCA001
ADU.001	Addess unit, AU-5A	SCA001
ADU.002	Addess unit, AU-5B	SCA001
ADU.003	Addess unit, AU-5D	SCA001
ADU.005	Addess unit, AU-5E	SCA001
ADU.006	Addess unit, AU-5C	SCA001

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 2.4.10.

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:

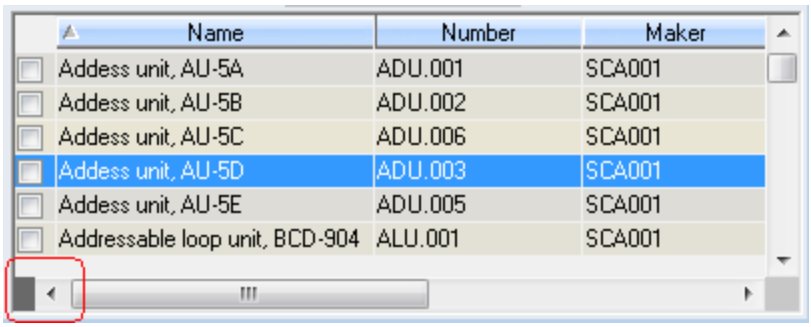


Figure 11 A split line in the list

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:

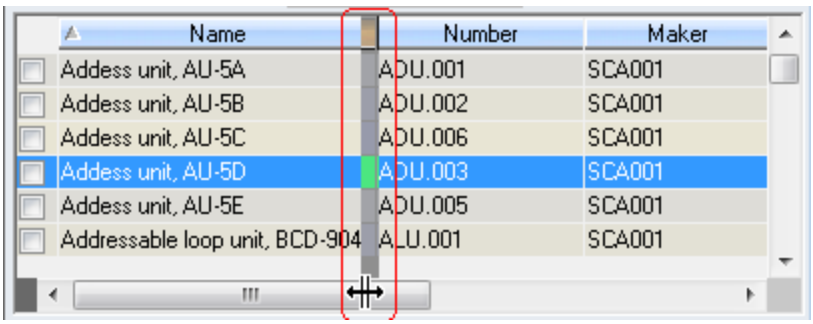
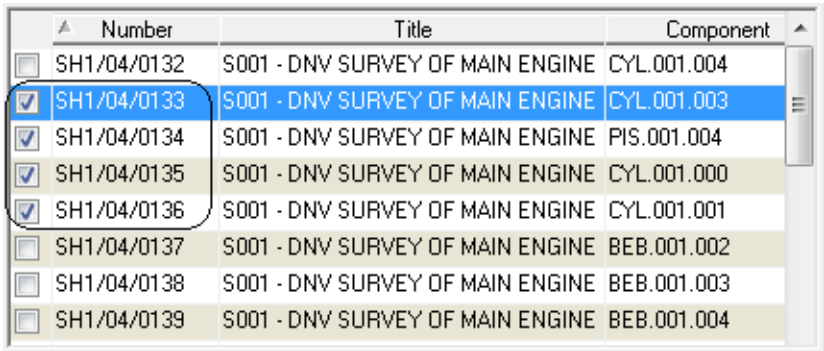


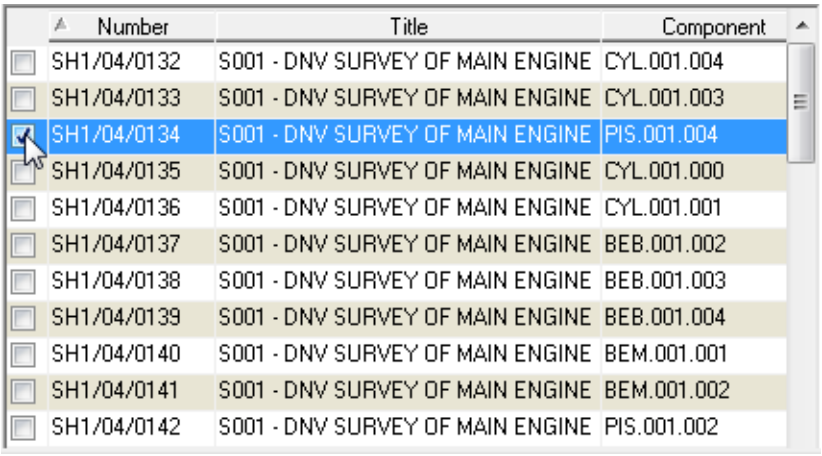
Figure 12 Dragging the split line

2.4.9 Multi-Selecting

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

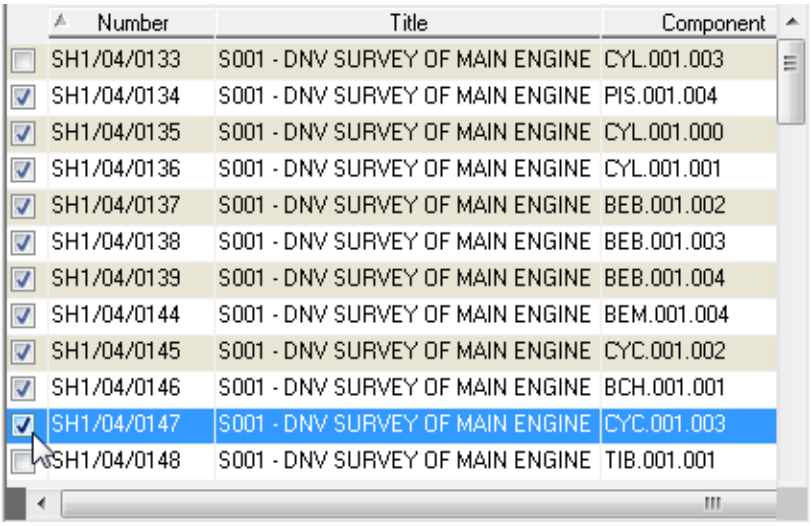


To tag a large number of consecutive rows, tag the first row to select it:



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:



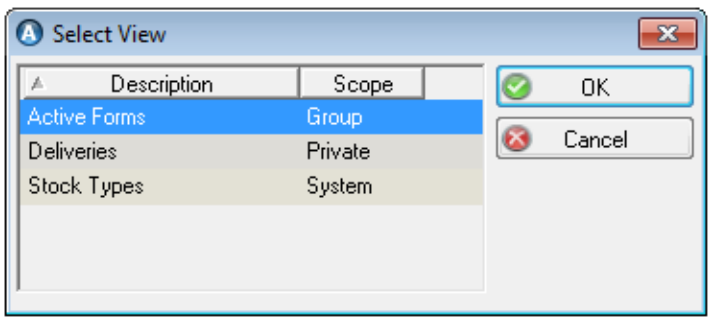
Number	Title	Component
SH1/04/0133	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.003
SH1/04/0134	S001 - DNV SURVEY OF MAIN ENGINE	PIS.001.004
SH1/04/0135	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.000
SH1/04/0136	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.001
SH1/04/0137	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.002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

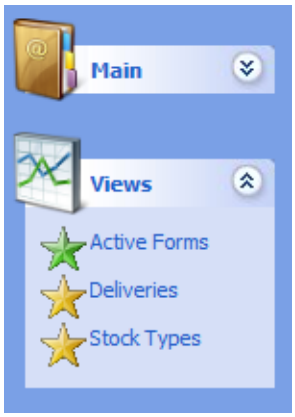
Go to **Tools > Select View** or press the **F6** key. The Select View dialog opens:



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 (see section 2.4.11.1) can also be used to create special forms, and 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.

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.

[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: 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.

2.4.11.1 Templates

AMOS provides a feature called Templates, which makes it possible to define how a Details tab or Full Description window should be presented on screen. Using a template, the Details tab/window can be given the appearance of a specialised input form.

Users can create new templates using PowerBuilder, and import them into the Business Suite. These templates can then be attached to the Details tabs in the application such that the users can fill in forms rather than write information into blank pages. This process can assist the user by 'asking' for the required information.

The templates are usually attached to the Details tabs using the **Edit > Change Template** menu command. However, a template may be attached automatically on creation of a new table entry, by setting a default parameter.

Read more about creating and using Templates and the Templates register in the *AMOS Business Suite Reference Manual*.

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:

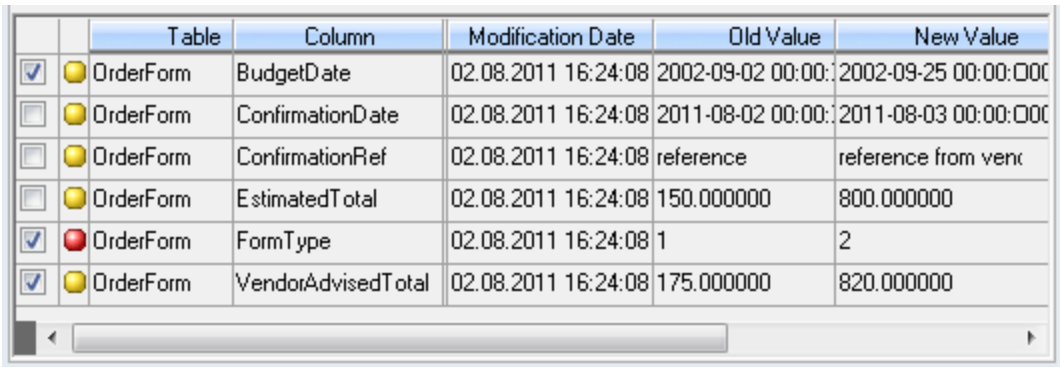


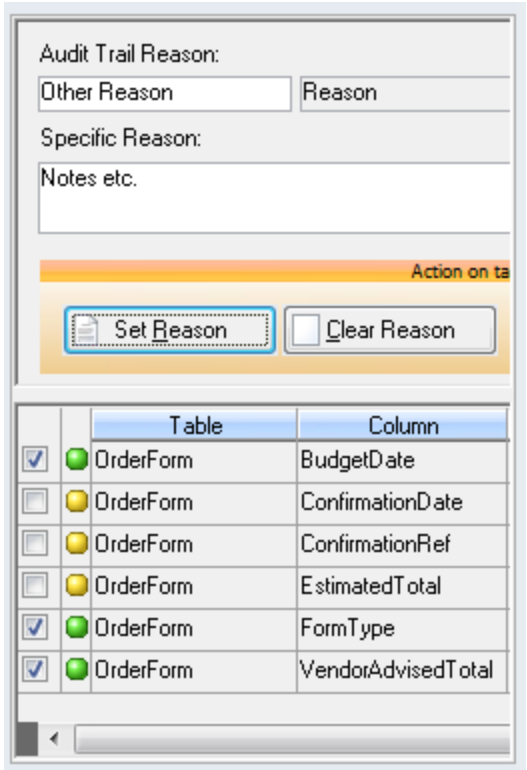
		Table	Column	Modification Date	Old Value	New Value
☑	🟡	OrderForm	BudgetDate	02.08.2011 16:24:08	2002-09-02 00:00:	2002-09-25 00:00:00
☐	🟡	OrderForm	ConfirmationDate	02.08.2011 16:24:08	2011-08-02 00:00:	2011-08-03 00:00:00
☐	🟡	OrderForm	ConfirmationRef	02.08.2011 16:24:08	reference	reference from ven
☐	🟡	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[1].

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

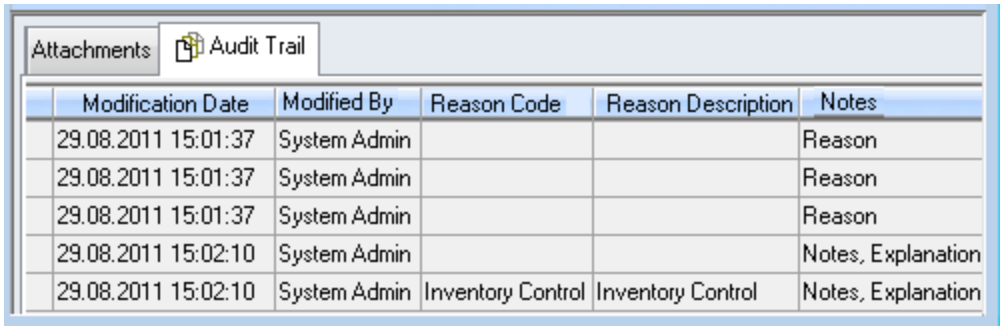
If no reason codes are available/applicable, enter a free-text explanation.

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.

2.4.13.1 The Edit Menu

The Edit Menu contains the basic information manipulation tools for all AMOS Business Suite data windows, providing that there is editable information within the window.

When there is a column at the left hand side of the data window that allows for tagging of one or more records, the Edit menu will be similar to the following:

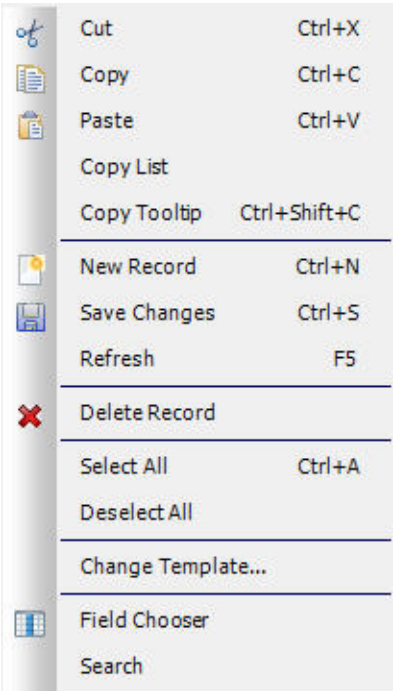


Figure 13 Edit Menu

If there is no facility to choose fields in the current window, the **Field Chooser** menu option will not be visible.

Cut	Removes the highlighted text and places it on the clipboard.
Copy	Places a copy of the highlighted text on the clipboard.
Paste	Places the content of the clipboard at the cursor position.
New Record	Creates a new, blank record.
Save Changes	Saves any changes made to information.
Refresh	Updates the current window with recent information.
Delete Record	Deletes the currently highlighted record.
Select All	Tags all records in the current window (checks all boxes).
Deselect All	Un-tags all records in the current window (clears boxes).
Change Template	Changes the template to be used for details screens. 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	Gives access to the Field Chooser window where you can select which fields are to be shown in the lower data window of certain screens. When you select this command, a list of the columns available for this window is displayed. Check the boxes for those columns you wish to appear in the list.
Search	Opens a Search field in the top of the list part of the window. Typing directly in the field allows you to search within the listed records, whether they have already been filtered or not. Holding the **SHIFT** key and clicking in the field opens an Advanced Search dialog, where further search parameters can be entered.

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.

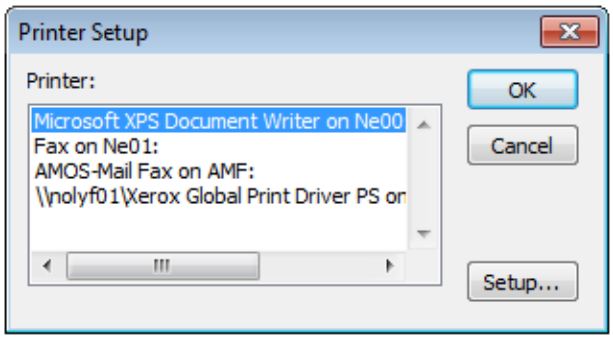


Figure 14 The Printer Set-up Window

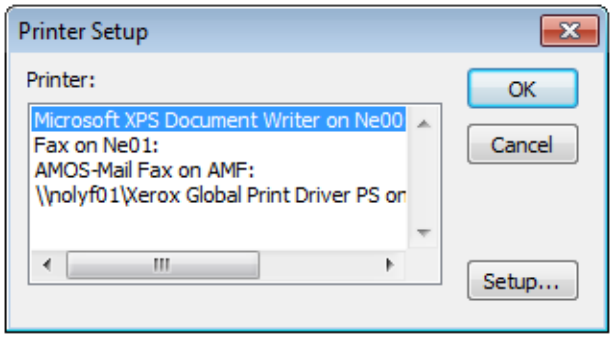
Click the **Setup** button to enter the Properties dialog box for the selected printer. The options available in this box depend on the printer and printer driver selected.

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 AMOS Personnel

Using AMOS Personnel, you can log virtually any useful information regarding your employees, including medical and personal information, certifications each employee holds, contract details, service records and documents like passports.

Having registered background information about every employee, other modules allow you to:

- Monitor certification requirements and upcoming expiration dates.
- Plan and keep track of schedules by employee, rank and vessel.
- View and confirm upcoming crew changes.

3.1 Employee Overview

The Employee Overview window contains a list of all the employees in your organisation. Select an employee to view his or her profile:

To create a new employee:

1. Go to **Crewing > Employee**. Click **New** in the window.
2. Enter the employee's basic details in the General tab. Go to **Options > Details** if you need a free-text window for extra comments.
3. **Save** the information. Proceed through the tabs to complete the employee's registration.

3.1.1 Employee Addresses

To register an employee's address:

1. Select the employee in the list.
2. Choose an **Address Type**.
3. Go to **Options > Address Details**.
4. Fill in the Employee Address fields and click **OK**.



5. The address appears on the General tab now.
6. To view or add another one for the same employee, select a different **Address Type** and then open the dialog again.
7. **Save** the window.

3.1.2 Adding A Photo

To add a photograph to an employee record:

1. Go to **Crewing > Employee**. Select an employee.
2. Go to **Options > Open Photo** or click in the photo area.
3. Browse to and select a photo.
4. Click **Open**.
5. **Save** the record.

3.1.3 Employee Family Members

The Family tab is for adding information about the selected employee's next-of-kin and spouse. If any of the details change, click the **To History** button to save the existing record to the history list, and then create a new current entry.

There are several buttons on the right side of the tab. Each one is for a different type or category of employee family member. The number of buttons and their labels are customisable.

To add a family member:

1. Select an employee and open the Family tab.
2. Click a button on the right side to open the correct list.
3. Fill in the details.
4. **Save** the record.

To remove a record, select it and click the **Delete** button in the tab, or, click **To History** to save the old record.

3.1.4 Employee Standard Documents

Standard documents are all types of documents related to employees, like passports, visas, training certificates and licenses, which entitle the holder to serve onboard a specific ship. These documents are registered in the Education/License, Medical Info. and Passport tabs in the Employee Overview window, according to type:

- **Education/License** tab. Register the crew member's certificates and qualifications, and enter details on education relating to maritime schools, other schools and courses.
- **Medical Info.** tab. Register medical information about the employee like inoculation records, details about an illness and keep a read-only record of past illness.
- **Passports and Visas** tab. Register employee passports, visas and other related documents.

Categorising Documents Within a Tab

There are several buttons on the right side of each tab. Each button is for a different type or category of employee documentation:



Figure 15 Buttons in the Educ./Lic tab

The number of buttons and their labels are customisable.

Expiration Warnings

In all three tabs, expired documents are automatically flagged with a red ball:

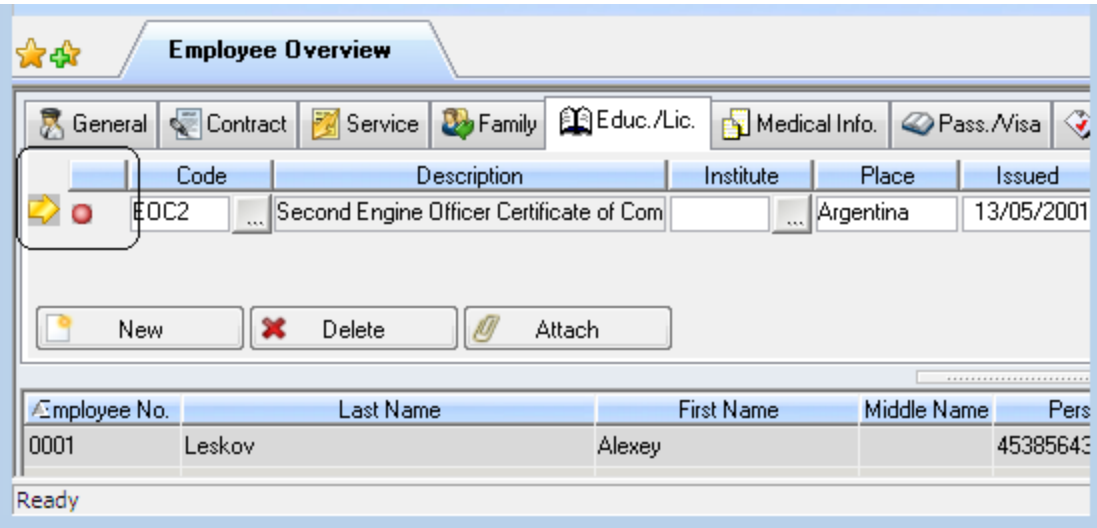


Figure 16 The Education/License tab, showing an expired document

A green ball on a button indicates that all the documents in that table are valid. A red ball indicates that one or more documents are expired, and a yellow ball indicates that one or more documents in that table is about to expire. The same green, red or yellow ball will appear on the General tab for each employee.

3.1.4.1 Adding A Standard Document

Standard documents are registered in the Education/License, Medical Info. and Passport tabs in the Employee Overview window, according to type.

To add a document to one of the tabs:

1. Select an employee and open the tab.
2. Click a button on the right side to open the correct document list.
3. Click the **New** button in the tab.
4. Lookup the document by **Code** and **Description**.
5. Fill in the other details.
6. **Save** the record.

To remove a record, select it and click the **Delete** button in the tab.

3.1.4.2 Customising Buttons In The Employee Window

Buttons appear in several of the Employee Overview window tabs, allowing you to categorise the information stored in the tab.

> EXAMPLE
>
> The Pass./Visa tab contains a button for **Passport**, **Visa**, **ID Book** and **Seamans Book**. Clicking on any one of the buttons changes the information shown in the tab.

It is possible to customise buttons - you can choose to add a new one or remove an unused one. Customisable buttons are present in the following tabs:

- License
- Medical Info.
- Pass./Visa
- Family

To Add a Button

1. Go to **File > Open Register > Personnel > System**.Expand the Employee Details folder.
2. Select the register for the tab you are going to add to.
3. Click **New**.
4. Select a **Code** and then enter a **Title** and **Description** for your button.
5. Choose the **Standard Doc. Type**[1] which this button will categorise.
6. Enter a number in the **Sequence** field. This defines where in the list of buttons the new one will appear. You might need to re-number existing ones.
7. Flag **Mandatory** to make the new button a standard entry.
8. **Save** and exit the register. When you open the corresponding tab in the Employee Overview window, you will see your new button.

To Remove a Button

1. Open the corresponding folder under System in the Personnel Registers window.
2. Select an entry.
3. Click **Delete**.
4. **Save** and close the register.

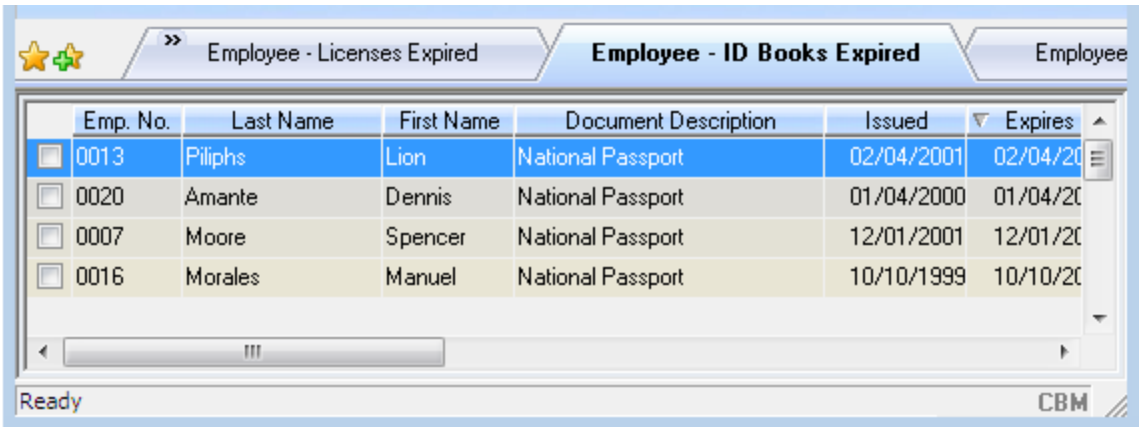
You cannot delete a button which already has records linked to it in the Employee Overview window.

3.1.4.3 Keeping Track Of Expiration Dates

All certifications and licenses registered in the database are checked continuously. The Expired windows list any documents or certificates that have expired or which have no valid expiry dates.

Go to **Crewing > Expired**, where you can then select to view:

- expired licenses
- expired medical certificates
- expired ID books
- expired service - a current service which is completed but not transferred to History.



[1] If no suitable standard document type is available, you can create a new one in the Standard Document Type register inside the Employee folder.

Double-click on a line to open the Employee Overview window to an expired document or certification.

3.1.5 Registering Employee Illness And Recovery

Keep track of any illness an employee may have, and register his/her recovery as well.

Illness

To register an employee's illness:

1. Open the Employee Overview window.
2. Select an employee and open the Medical Info. tab.
3. Click the **Sickness** button and fill out the form.
4. **Save** the record.

Recovery

Once a sick employee has regained his/her health:

1. Open the Medical Info. tab and click the **Sickness** button.
2. Check the **Recovered** box and enter the **Date** he/she returned to work.
3. Click **Save**. The sickness record is moved to the 'Sickness History' list.

3.1.6 Employee Evaluations

Create and save employee evaluations in the Service tab:

1. Select an employee and open the Service tab.
2. Click the **Evaluation** button.
3. Click the **New** button inside the tab.
4. Fill in the **Dates** and the **Evaluator**'s name.
5. Select a grade from the **Evaluation** drop-down list for each criteria.
6. **Save** the window.

To remove an evaluation from the list, select it and click the **Delete** button in the tab.

3.2 Defining Employee Contracts

Before you can create the employee's service records and calculate leave days, you need to enter a valid contract in the Employee window Contracts tab.

Current Contracts

An employee can only hold one current contract at a time.

Past Contracts

When a contract is terminated, enter a reason in the **Termination** field. After saving, the contract is then transferred automatically to the 'Past' list. Click the **Past** button to see the details of all past contracts.

AMOS also moves contracts automatically to the Past list when they expire, according to the date set in the **Expires** field.

Click the **Current** button to return to the active contract.

3.3 Keeping Track Of Leave Days

Keep track of leave days earned and used by employees in the Service tab. Click the **Leave Days** button to see this information.

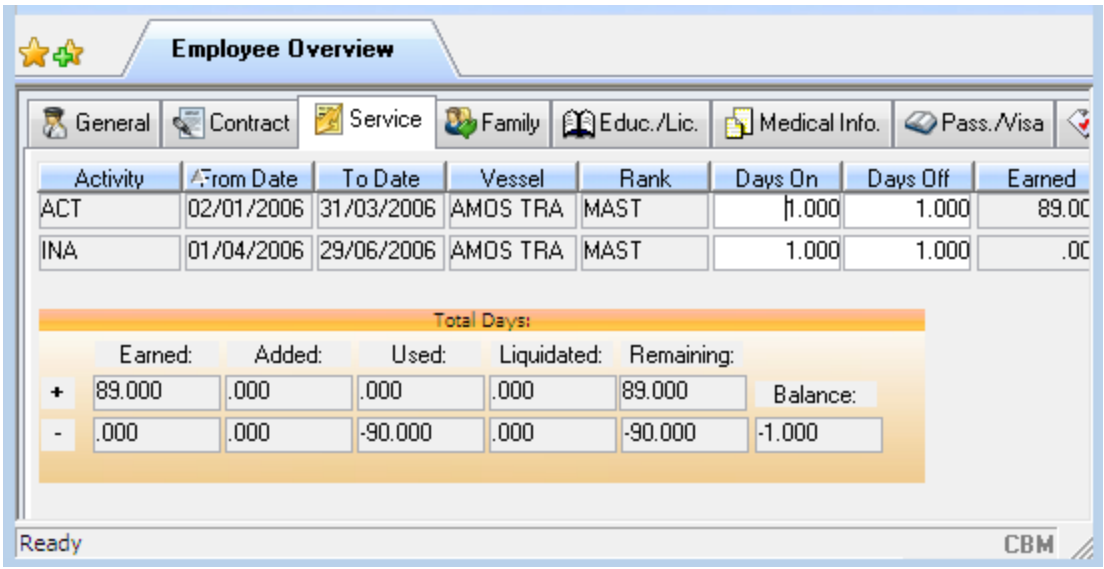


Figure 17 The Leave Days screen

NOTE: Tracking and updating leave days requires that a valid contract is registered first, in the Contracts tab.

The leave days earned depend on the employee's contract and are added to the tab automatically. The number of leave days an employee earns per working day is defined on his/her contract.

You can add, deduct and liquidate leave days manually as required. If you make any changes to the leave days information or the employee's contract, click the **Calculate** button to update the balance.

3.4 Crew Planning

With AMOS Personnel you can plan and manage crewing schedules aboard all your vessels:

1. Define a manning scale for each vessel.
2. Define license and certification requirements for the crew members on each vessel.
3. Generate, allocate and plan employee service periods on your vessels.

3.4.1 Defining Manning Scales

Each vessel has a defined manning scale - the number and ranks of the crew members required to run the vessel.

To define a manning scale:

1. Go to **File > Open Register > Personnel**.
2. Expand the Crew Management folder.
3. Select the Vessel register.
4. Select a vessel.

5. Open the Manning Scale tab.
6. Click the **New** button in the top of the tab.
7. Lookup and select a rank.

- Enter the normal **Operational** manning requirement: the number of personnel normally employed in that position.
- The **Minimum** requirement: the legally justifiable minimum required to run the vessel safely.

8. Add all required ranks.
9. **Save** the register.

3.4.2 Defining License And Certification Requirements

Every position on a vessel requires that the employee holding it has a particular combination of valid licenses, certificates, courses, etc,. To define these requirements:

1. Go to **File > Open Register > Personnel**.
2. Expand the Crew Management folder.
3. Select the Vessel register.
4. Select a vessel.
5. Open the Manning Scale tab.
6. Select a rank in the manning scale list.
7. Click **New** in the bottom part of the tab.
8. Lookup a document; select its **Country of Issue**.
9. Add as many as needed for each rank/vessel combination.
9. **Save** the register.

3.4.3 Managing Employee Service Periods

There are two places to manage employee service periods from:

- You can generate and keep records of service periods in the Employee Overview window.
- You can generate, plan, check and change service in the Schedule windows.

3.4.3.1 Employee Overview - Service Tab

Click the **Service** button on the right side of the Employee Overview window > Service tab to see the current, planned and historical service for the selected employee:

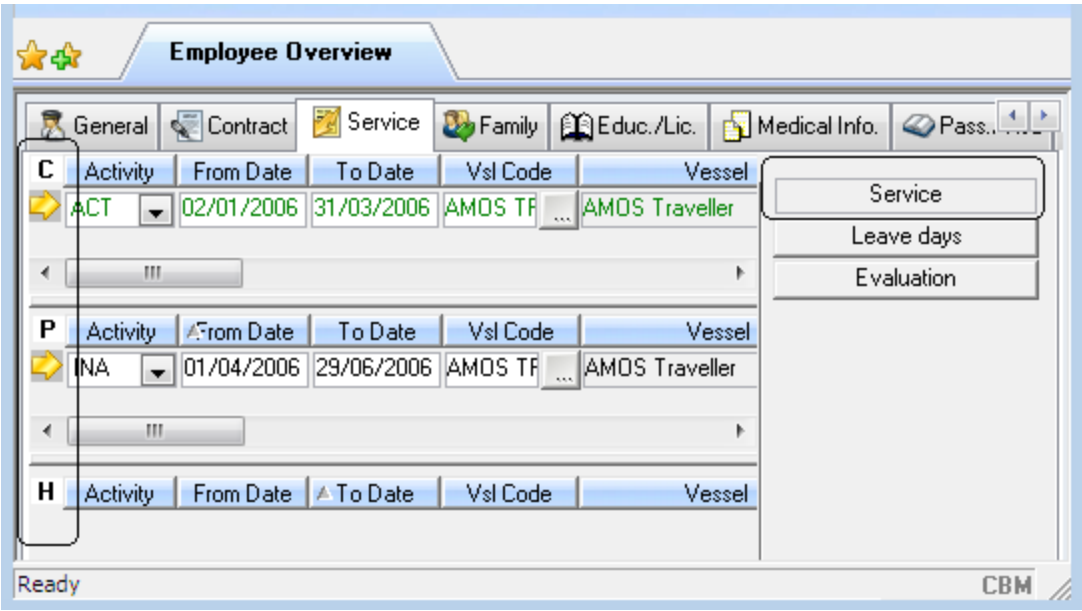


Figure 18 The Service tab, Service button selected

- **C - Current** - the service that the selected employee is currently performing.
- **P - Planned** - the future service planned for this employee.
- **H - History** - once a service is completed it is automatically transferred to the History table.

3.4.3.1.1 Generating a Service Period

To generate a planned service period:

1. Access the Generate Service dialog:

   Go to **Crewing > Employee**, select an employee and open the Service tab. Click **Generate**.

   Or,

   Open the Rank or Employee Schedule window and select an employee. Go to **Options > Generate Service**.
2. Select an activity and fill in the dates and details for the upcoming service.
3. Click **OK**, and the record will be created in the Planned section of the Service tab or in the chart on the Schedule window.
4. **Save** the window.

NOTE: To generate a service period for an employee from the Employee Overview window, he/she must already hold a valid contract. Contracts are defined in the Employee Overview window > Contracts tab.

3.4.3.2 Working In The Schedule Windows

The Schedule windows[1] show a graphical overview of which employees are planned to serve on board any vessel, when they will sign-on and off, the duration of their service period and in which position they will serve.

There are three Schedule planning windows:

[1]The schedule windows draw information from the manning scales and license requirements defined in the Vessel register.

Employee. Shows the planned and current service for the listed employees for the selected time period. When an employee is allocated to a vessel for a service period, a blue bar in the schedule shows the duration of his/her service.

Rank. Shows a list of ranks and vessels, and the employees allocated to fill the ranks on each vessel.

Vessel. Shows a list of vessels and the ranks required to crew each one. Employees are listed below the rank they are filling on a vessel and a blue bar in the schedule table shows the duration of the service.

Setting the Window Time Scale

The time scale across the top of the schedule charts is divided into two main scales:

- The major time scale on the top line in which you can select to view the scale as years, quarters etc.
- The minor time scale on the second line in which you can select to view the major time scale sub-divided into quarters, months, etc.

To set the time scales for the window:

1. Open one of the Schedule windows.
2. Go to **Options > Time Scale Setting**.
3. Select a radio button in each column and a format to set the required time scale layout.
4. Click **OK** to close the dialog or **Cancel** to exit without changing the settings.

3.4.3.2.1 Generating a Service Period

To generate a planned service period:

1. Access the Generate Service dialog:

   Go to **Crewing > Employee**, select an employee and open the Service tab. Click **Generate**.

   Or,

   Open the Rank or Employee Schedule window and select an employee. Go to **Options > Generate Service**.
2. Select an activity and fill in the dates and details for the upcoming service.
3. Click **OK**, and the record will be created in the Planned section of the Service tab or in the chart on the Schedule window.
4. **Save** the window.

NOTE: To generate a service period for an employee from the Employee Overview window, he/she must already hold a valid contract. Contracts are defined in the Employee Overview window > Contracts tab.

3.4.3.2.2 Assigning an Employee to a Position for a Service Period

1. Go to **Crewing > Planning > View Vessel Plan** to open the Vessel schedule.
2. Double-click on a rank/position.

   Available employees holding that rank will be listed for selection.
3. Select an employee and click **OK**. The employee is added to the schedule.
4. Click on the employee name and go to **Options > Generate Service**; or select Generate Service from the right-click menu; or click the **New** button in the toolbar.

5. Enter details for the service period in the Generate Service dialog.
6. **Save** and exit the dialog.

You may need to refresh the schedule to see the new service. You can create as many service periods - both active and inactive - for employees as needed.

3.4.3.2.3 Moving or Changing the Length of a Service Period

Moving a Service Period

1. Place the cursor on a blue bar.

   The cursor changes to a double-headed arrow and the period's current start and end-dates appear in boxes above the bar.
2. Drag the blue bar across the chart to a new position.
3. **Save** the changes.

Changing the Length of a Service Period

1. Place the cursor on the start or end of a blue bar.

   The cursor changes to a single-headed arrow and the period's current start or end date appears in a box above the bar.
2. Drag the end of the blue bar across the schedule to a new start or end spot.
3. **Save** the changes.

3.4.3.2.4 Checking Planned Service Periods

You can run a check on the planned service periods and if any problems are discovered, such as a proposed crew member does not have the correct certificates up to date, the system will indicate a problem so you can correct it.

1. In an active Schedule window, go to **Options > Check Plan**.
2. The plan is checked. If any problems are discovered, the blue bar turns red for that employee.
3. Double-click on the red bar to open the Service Info. dialog.
4. Open the Service Check tab to get a list of points you should check.

3.4.3.2.5 Viewing or Changing Service Info

Double-click on a service period to open the Service Info dialog with the details for the assigned employee.

Open the Service Check tab to see a list of any licenses or certificates that the employee is missing according to the vessel's requirements, or that have reached or passed their expiry date. If any such documents are listed, go to the employee's Overview window, find the documents and rectify the problems. You can open the Employee Overview window by double-clicking on the name in the planning window.

3.5 Crew Changes

The Crew Change windows show the upcoming planned crew changes, let you make travel arrangements for crew members and confirm crew changes as they take place.

3.5.1 Upcoming Crew Changes

To view an upcoming crew change go to **Crewing > Crew Change > View Upcoming**. You can see:

- a list of the employees who are due to sign off the selected vessel(s) during the time period you filter for.
- a list of the employees who are due to sign on to the selected vessel(s) during the time period you filter for.

Creating a Travel Booking Form

Travel bookings contain all the required information needed by a travel agent to make the arrangements necessary for employees to travel to and/or from their vessels. To create a travel booking form:

1. Go to **Crewing > Crew Change > View Upcoming**.

   There are two lists; employees signing off and employees signing on.
2. Select the employee(s) to make travel arrangements for.
3. Go to **Options > Request Travel Booking**.
4. An MS Word document opens, containing the details of the selected employee(s). Check and **Save** the document.

   Print out and send, or email the document to your travel agent.

3.5.2 Confirming A Crew Change

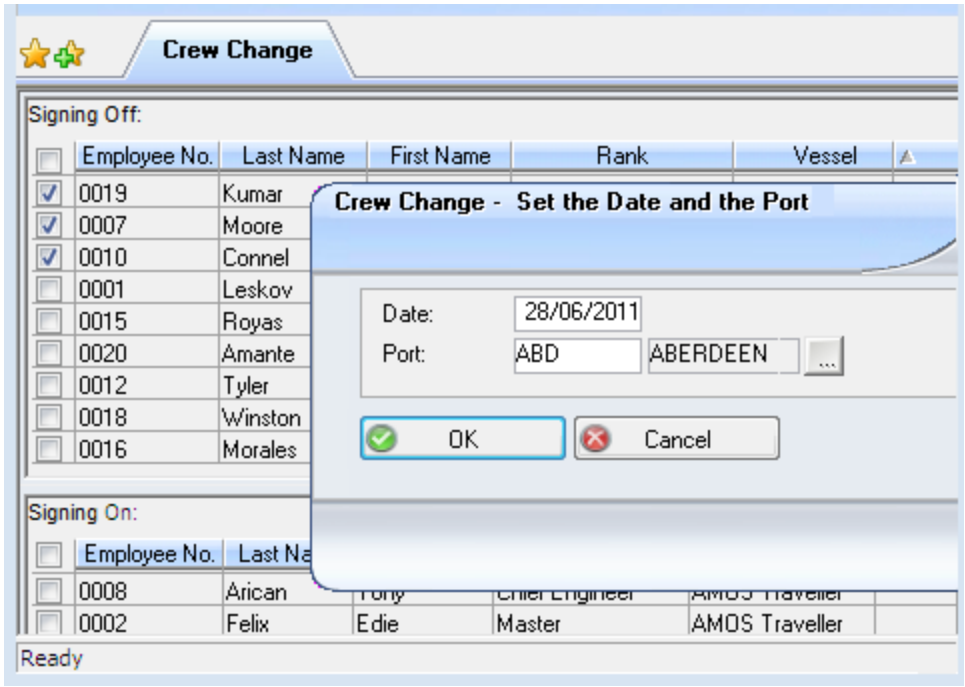
As a crew change takes place, confirm it in AMOS:

- **Multiple Crew Members**. To confirm a crew change for many employees simultaneously, for example if you are changing 5-10 officers/crew members in the same port on the same vessel, use the **Crew Change > Confirm** window.
- **One or Two Crew Members**. When you have just one person signing off and their replacement signing on, go to those employees' Service tabs and confirm the change there.

Confirming a Crew Change from the Confirm Window

1. Go to **Crewing > Crew Change > Confirm**. Select a **Vessel** in the filter.
2. The window shows the crew changes to be confirmed:
- the list of employees who are signing off the vessel during the specified period.
- the list of employees who are signing on to the vessel during the specified period.
3. Flag the crew members you want to confirm as changed.
4. Go to **Options > Confirm Crew Change**, or select the same option from the right-click menu.

   The Crew Change dialog opens:



- Set the **Date** of the change.
- Set the **Port** in which the changes took place.

5. Click **OK** to finish and remove these crew members from the lists in the Crew Change window. The Service tab in the Employee Overview window will also reflect these changes: the service details will show in the 'Current' list for the newly signed on crew and previously active service will be moved to the 'History' list for signed off crew.

Confirming a Crew Change from the Employee Overview Window

1. Go to **Crewing > Employee**.
2. Select the employee who is due to sign off.
3. Open the Service tab and select the current activity.
4. Click **Confirm**. The previously active service moves to the 'History' list.
5. Select the employee who will sign on as the replacement.
6. Click **Confirm**. The next planned service moves to the 'Current' list.
7. **Save** and exit the window. The sign on/sign off will be reflected in the Crew Change windows.

CHAPTER 4 Payroll

AMOS Business Suite Payroll functionality manages employee payrolls: the creation, progress and closure of payrolls from the beginning to the end of your employees' contracts.

The processes involved in setting up and utilising the payroll functionality are:

1. Define available wage types and bargain agreements. See section 4.1.
2. Create one or more worksets and add employees to them. See section 4.2.
3. During an active payroll period, register and keep track of employee transactions. See section 4.3.
4. Run the payroll. See section 4.4.
5. Close the period. See section 4.5.

4.1 Wage Types And Bargain Agreements

Employees can hold different kinds of wage types. Additionally, your company will have bargain agreements with your 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 and the bargain agreements are assigned to employees.

1. Define a list of all available wage types. See section 4.1.1.
2. Define your bargain agreements and link wage types to each one. See section 4.1.2.
3. Populate a wage scale by rank, for each bargain agreement. See section 4.1.3.
4. Link the bargain agreements to the employees they apply to. See section 4.1.4.

4.1.1 Defining Wage Types

The Wage Type register is for defining the details of every wage type employees can hold. To enter a new wage type:

1. Go to **File > Open Register > Payroll > Wage Type**.
2. Click **New** on the toolbar.
3. Enter a **Code** and **Description**.
4. Select a **Module**:

- Leave Days Balance - picks up total leave days from service.
- Leave Days this Month - picks up leave days earned in the current month from service.
- Balance Transferring - must be linked to wage type 980 - Balance. Any negative amount in balance is carried forward to next month.

5. **Save** the wage type so far.

4.1.1.1 Wage Type Rounding Methods

Select a **Rounding** method for each wage type: none, upwards, downwards or by currency.

Setting the rounding method to currency means that only the currencies flagged in the Currency Rounding register will be rounded. To select the currencies to round in this case:

1. Go to **File > Open Register > Payroll > Currency Rounding**.
2. Flag the currencies to round.
3. **Save** and close the register.

4.1.1.2 Wage Type Formulae

To use a wage type in a calculation,click in the **Wage Formula** field and go to **Options > Edit Formula**. You can enter or edit formulae for wages types and accumulators here.

> **EXAMPLE**
>
> Wage type 112, variable overtime, picks up the amount per hour overtime from wage type 080, basic variable overtime and multiplies it with numbers of hours. The formula for this is Q* [80].

Go to **Options > Clear Formula** to clear the **Wage Formula** field.

4.1.1.3 Processing Rules

Processing rules indicate whether a wage type is a **Payment**, a **Deduction** or a **Calculation**.

Some wage types - such as deductions- are only included after a certain number of days. If so, select **Yes** in the 'Day limited' section and enter percentages of the amount to be taken before and after a set number of days is reached.

If the wage type is not 'Day limited', choose **No**. There may be another type of limit however - if so, click the second **Yes** to activate the **Limitation** field. Set a monetary limit to ensure that extra amounts are not taken from crew members' pay.

> **EXAMPLE**
>
> A union fee could be 2 % of the wage or up to 50 dollars, but not more, even if the employee works more and 2 % is equal to more than 50 dollars.

4.1.1.4 Linking Accumulators

Use the **Add** button in the 'Accumulators' section to link accumulators to wage types.

> **EXAMPLE**
>
> Leave Pay is an accumulator. Crew members receive leave pay every month, but it is not paid out until they leave the vessel in several months' time. Therefore, their leave pay accumulates with every pay: the previous month's balance carries forward and the current month's leave pay is added to it.

Accumulated wages are carried forward month-by-month. The accumulators can be linked to any type of wage and are shown in the Fixed Transaction tab and Accumulators tab on the Employee Overview window.

4.1.1.5 Including A Wage Type In Payroll

Flag the **Default**checkbox to always include the wage type when running payroll. All wage types included in a payroll run must be added in the set of fixed wages linked to bargain agreements.

Flag **Show on Payslip** to print the wage type on employee payslips.

Link wage types to cost centres and account codes in the 'Cost Centres' section. **Add** only one cost centre per wage type.

4.1.1.6 Wage Scale Sources

Select the entry in the **Wage Scale Source** field that corresponds to the selected wage type.

> **EXAMPLE**
>
> If the wage type is fixed overtime, select 'Fixed Overtime' from the **Wage Scale Source** drop-down list.

4.1.1.7 Filtering Wage Types - Identification Values

You will probably end up with a long list of wage types. To make filtering wage types on variable transactions easier, assign an identification value to each wage type here:

1. Select a wage type.
2. Assign an **Identification** value: Undefined, Variable, Fixed or Calculation.
3. Go to **Tools > Configuration > Parameters > Options > Payroll > Variable Transactions >** 'Identification Filter'.
4. Set the parameter to TRUE and **Save** and close the window.

Now,users will be able to filter wage types by identification value when defining variable transactions.

4.1.2 Defining Bargain Agreements

Bargain agreements between your company and its employees are listed with their details in the Bargain Agreement register. 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. To create a new bargain agreement:

1. Go to **File > Open Register > Payroll > Bargain Agreement**.
2. Click **New** on the toolbar.
3. Enter a **Code** and **Description**for the bargain agreement entry.
4. Link one more wage types using the **New** and **Delete** buttons in the 'Wage Types' section.
5. **Save** the bargain agreement.

4.1.3 Populating A Wage Scale

All fixed wages like overtime, leave pay per month, etc. need to be inserted, by rank, in a wage scale. To insert or edit a wage:

1. Open the Bargain Agreement register and select an entry.
2. Go to **Options > Edit Wage Scale**. The Wage Scale Setup window opens.

   If wages have already been defined for this bargain agreement, you will see a list at the bottom of the window.

   > **TIP**
   >
   > Select a **Rank**, **Ship Category** and/or **Seniority** level from the Filter fields in the top of the window to narrow the list of wages, or leave the default setting 'All' to view all the wages.

3. All wages are entered by rank: click the **New** button to add a wage.
4. Select a **Rank** and **Ship Category**.
5. Fill in the table columns with the appropriate rates your organisation uses. The OT Rate 1, 2 and 3 columns are for the overtime rate per hour. Extra Payment 1, 2 and 3 are for monthly amounts, i.e. monthly bonus.
6. Enter a number in the **Seniority** column to indicate the number of months an employee must have service for before that particular wage scale will be automatically selected.
7. **Save** the scale. Close the window to return to the bargain agreement.

4.1.3.1 Inserting Future Wages

At certain intervals employees will get pay raises. Inserting these new wages can be a time consuming job and should be done in advance, in the Future Wage Scale Setup window. While this job is being completed in advance, the current wage rates will still be in use. To insert future wages:

1. Open the Bargain Agreement register and select an entry.
2. Go to **Options > Future Wage Scale**. The Future Wage Scale Setup window opens.
3. Click **New** and add a wage. See the procedure above.
4. Enter the date the wages will take effect from in the **Valid From** field.
5. **Save** the future scale. Close the window to return to the bargain agreement.

4.1.4 Linking Bargain Agreements To Employees

Once you have bargain agreements defined, each with a list of applicable wage types and a populated wage scale, specify which bargain agreement each employee belongs to:

1. Go to **Crewing > Employee**. Filter and open the window.
2. Select an employee and open the Contract tab.
3. Lookup the employee's **Bargain Agreement**.
4. **Save** and close the window.

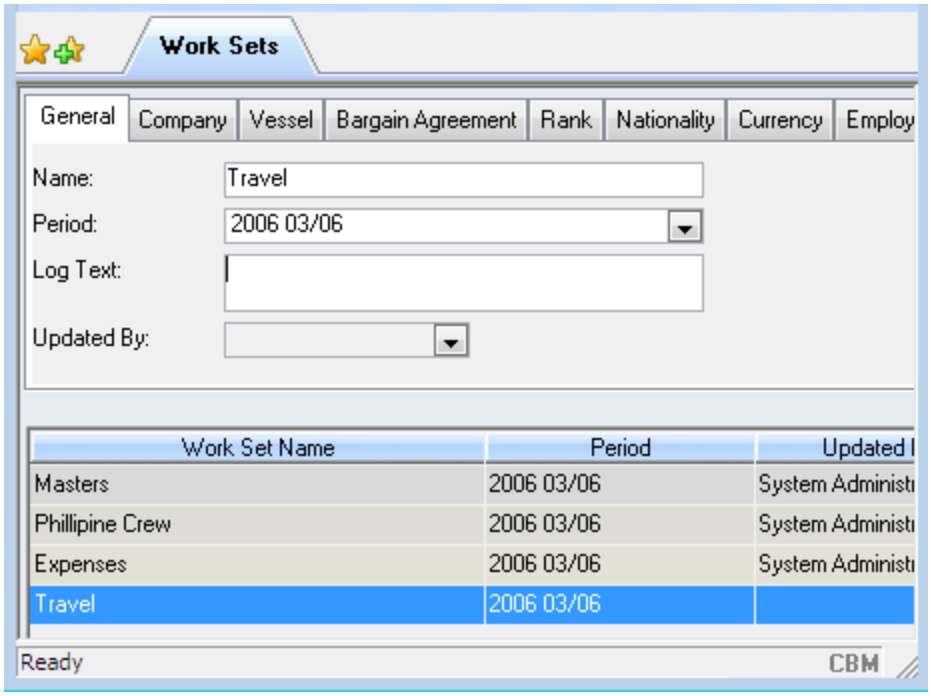
4.2 Work Sets

A work set is a group of employees for whom you will later run a payroll. Work sets can be comprised of employees inside a company, on a particular vessel, belonging to a selected bargain agreement, holding a particular rank, or a combination of any of these criteria.

Creating a New Work Set

To create a new work set:

1. Go to **Crewing > Payroll > Work Sets**.
2. Click **New** on the toolbar.



3. Enter a **Name** for the work set, select a **Period** from the drop-down list and add any relevant details in the **Log Text** field.
4. Decide who belongs in the work set by flagging one or more entries in any of the following tabs: Company, Vessel, Bargain Agreement, Rank, Nationality, Employee and Wage Type.
5. Flag one or more currencies to be used with the work set in the Currency tab.
6. Click **Save**. Open the Result tab. You see the list of employees who match the work set criteria. That is, they belong to flagged entries in the work set's tabs like one of the selected companies or vessels, etc.

4.2.1 Applying A Bargain Agreement To A Work Set

Employees in a work set may or may not already belong to a bargain agreement. Apply bargain agreements to work sets for reporting purposes. Select the bargain agreements that belong to the employees included in each work set, or any agreements for employees in the work set who do not already have agreements.

Either: open the Bargain Agreement tab and flag the applicable entries there. Or,

1. Go to **Options > Apply Bargain Agreement**.
2. Click the lookup button in the dialog and choose an agreement.
3. Click **OK**.

4.2.2 Editing Variable Transactions In A Workset

To edit the variable transactions belonging to a selected workset:

1. Go to **Crewing > Payroll > Work Sets** and select a work set in the window.
2. Open the Vessel tab and flag a vessel.
3. Open the Wage Type tab and select a wage type.

4. Go to **Options > Variable Transactions**. This opens the Variable Transactions window to a list of transactions for crewmembers belonging to the work set.

4.2.3 Generating Reports

To generate a personnel report from a work set:

1. Open the Work Sets window.
2. Go to **Options > Generate Reports**. You see a list of available reports.
3. Select a report.
4. Go to **File > Print**.

4.3 Keeping Track Of Transactions

Whenever transactions occur on board, register them against the appropriate employee. These transactions will be taken into account when the payrolls are calculated, and they will be added to or deducted from the overall amount as appropriate.

There are two kinds of transactions:

- Variable Transactions
- Fixed Transactions

4.3.1 Variable Transactions

Variable transactions are items that are debited and credited to an employee's account during the selected payroll period and are valid for that period only: like slopchest purchases and cash advances. Closing the system period clears variable transactions and you can start to insert the next period's transactions. All variable transactions must be inserted manually every payroll period for each employee.

You can open the Variable Transactions window[1] in two ways:

- Go to **Crewing > Employee**. Filter and select an employee and open the Variable Transactions tab. Click **New** or **View** to open the Variable Transactions window for the selected employee.

  Or,

- Go to **Crewing > Payroll > Transactions > Variable**. Filter and open the Variable Transactions window.

All transactions you enter will be saved in both the main window and the relevant employee's Variable Transactions tab.

4.3.1.1 Inserting A Variable Transaction

To register a variable transaction:

1. Open the Variable Transaction window. If you opened it from the Employee Overview, the window is already set up to register a new transaction for the selected employee.

   Otherwise, click **New** on the toolbar and lookup the **Employee No.**

2. Lookup a **Wage Type**.

[1] An instance of the Variable Transactions window can also be opened from the Crewing > On Board > Transactions menu.

3. Enter the quantity and rate of the transaction: AMOS calculates the amount automatically.
4. Fill in the other details.
5. **Save** the transaction.

To remove a variable transaction, select it and click **Delete**.

A read-only summary of each kind of variable transaction (i.e. master's cash payments, slopchest purchases) for the current month is displayed in the VarTrans Summary tab on the Employee Overview window for each employee.

> **EXAMPLE**
>
> A crew member has two 50 USD masters cash payments in one month, so the accumulated value of 100 USD will appear as Master's Cash in the VarTrans Summary tab.

4.3.2 Fixed Transactions

Most employees within a bargain agreement share a set of wage types. By defining basic wages, deductions for pension and union dues etc. at bargain agreement level, all employees belonging to the bargain agreement will inherit these wage types as a common standard. Such wage types and rates are linked to bargain agreements in the Bargain Agreement register.

> **EXAMPLE**
>
> All employees have the wage type Monthly Wages in their bargain agreement. The rate is defined in the wage scale, and it is also possible to overwrite this rate for a specific employee.

All fixed transactions present in the system at every level are listed in the Fixed Transaction window[1].When you select one, you see the list of wage types linked to it. In addition to inserting fixed transactions at bargain agreement level, you can also add them with wage types and rates on other levels:

- **Company** transactions apply to the entire company.
- **Vessel** transactions apply to just the selected vessel.
- **Status** transactions apply to all employees sharing the same level of status.
- **Employee** transactions apply to a specific employee.

Every fixed transaction shows a number in the **Level** field to indicate its entry point level: 1-5.

4.3.2.1 Manually Inserting A Fixed Transaction

To insert fixed transactions manually:

1. Go to **Crewing > Payroll > Transactions > Fixed**.
2. Click **New**.
3. Enter a **Code** and **Description**.
4. Select an **Entry Point Level**. This activates the corresponding level lookup below.
5. Use the activated lookup to choose the company/bargain agreement/vessel/status or employee to apply the new transaction to.
6. Go to **Options > Add Transaction**.
7. Lookup a **Wage Type**.

[1] An instance of the Fixed Transactions window can also be opened from the Crewing > On Board > Transactions menu.

8. Fill in the other details.
9. Click **Save**.

To remove an entry, select it and go to **Options > Delete Transaction**.

4.3.2.2 Inserting Employee Transactions From The Employee Overview

The entries that appear in the Employee Overview window Fixed Transactions tab are the transactions applying to each employee that are the same every month, such as standard wage. Certain fixed transactions are linked to bargain agreements: employees will inherit these transactions automatically, according to the bargain agreement specified on their contract.

You can also insert other fixed transactions at employee level directly from the Employee Overview window:

1. Go to **Crewing > Employee**.
2. Select an employee and open the Fixed Transactions tab.
3. Click the **New** button in the tab. This opens the Fixed Transaction window.
4. Fill in the transaction details.

   To add another wage type to the same transaction, go to **Options > Add Transaction**.
5. **Save** and close the window.
6. Refreshing the Employee Overview will show the newly added entry in the Fixed Transaction tab. A manually inserted transaction will show the number 5 in the 'Entry Point Level' column.

To remove a fixed transaction, select it from the list in the tab and click **Delete**. You can only remove manually inserted transactions - not inherited ones. To see the details of an existing transaction, select it from the list in the tab and click **View**.

4.3.2.3 Overwriting A Fixed Transaction

To edit an existing fixed transaction:

1. Open the Fixed Transaction window.
2. Select a transaction in the list.
3. Select a wage type entry and change it.
4. Click **Save**.

When a fixed transaction has been altered:

- The **Overwrite** is flagged if the original fixed transaction as inherited or previously entered, has been updated.
- The **Original Level** column shows where the transaction was first entered. The **Entry Point Level** value will change to the level at which the transaction has been updated.
- The **Wage Type** will appear in red on overwritten transactions.

4.4 Running The Payroll

After you have determined all fixed transactions, updated personal information and entered variable transactions, you can calculate wages for the current period.

Payslips. After running payroll you can print various checklists, bank lists and pay slips.

Accumulators. The Employee Overview window Accumulators[1] tab shows the period amount and totals for the year for any wage types linked to an accumulator. Accumulators do not appear on payslips.

Running Payroll for a Work Set

To run payroll for a work set:

1. Go to **Crewing > Payroll > Work Sets**.
2. Select a work set.
3. Go to **Options > Run Payroll**.

   A dialog informs you of the payroll's progress. AMOS will inform you if any employees in the work set have not had service in the current period, or if the period is already closed for them.
4. The process continues to completion for the employees who have had service in the current period.

Running Payroll for an Employee

To run payroll for an individual employee:

1. Go to **Crewing > Employee**. Filter and open the window.
2. Select an employee in the list.
3. Go to **Options > Run Payroll**.

   A dialog informs you of the payroll's progress AMOS will inform you if the employee has in fact not had any service in the current period, or if the period is already closed for him/her.
4. The process continues to completion.

4.4.1 Employee Payslips

After running payroll, you can see the payslip for each employee in the Employee Overview window Payslip tab. Each included wage type's details are shown separately. Variable transactions for the selected period are also displayed.

> **TIP**
> Filter for previous payslips using the Year and Month drop-downs at the bottom of the tab.

4.5 Closing The Payroll Period

When the payroll is completed, all bank transfers made, and control reports run, close the payroll period.

After end-of-period closing all transactions are marked as historical and all accumulators are updated with the current period figures.

1. Close the period for your work sets - vessels or groups of vessels, entire companies, or groups of employees.

   Or, as individual employees sign off, close the period for each one.
2. Then, close the period for the entire system.

[1]Wage types that are carried forward month-by-month.

4.5.1 Closing The Period For A Work Set

1. Go to **Crewing > Payroll > Work Sets**.
2. Select a work set.
3. Go to **Options > Close Transaction Period.**
4. The period is closed for the employees belonging to the work set.

4.5.2 Closing The Period For An Employee

When an employee signs off, close the period for him/her:

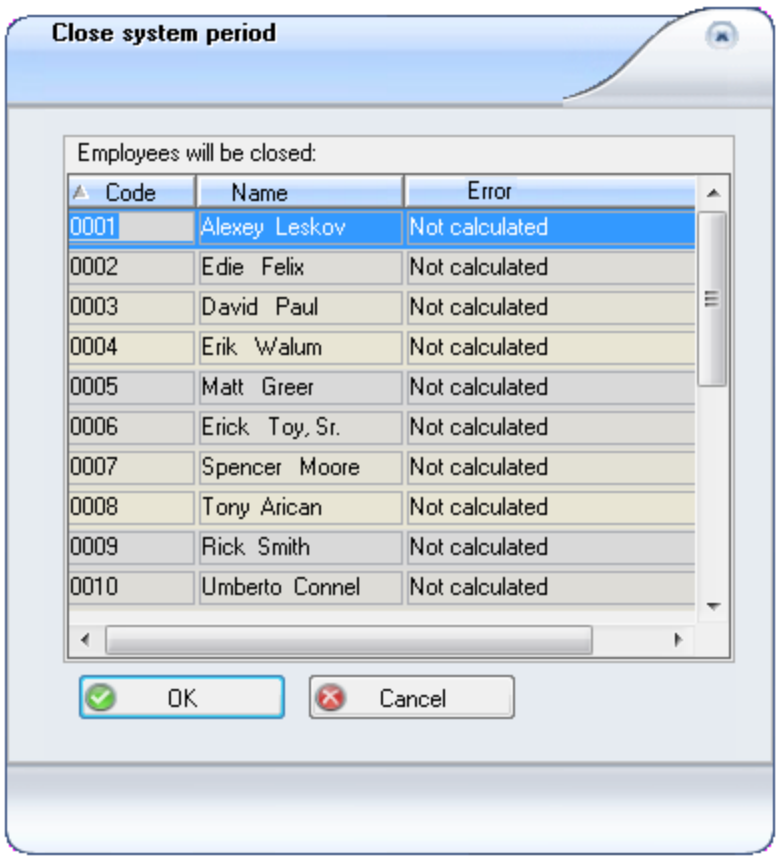
1. Go to **Crewing > Employee**. Select an employee.
2. Go to **Options > Close Period**.
3. The period is closed for that employee.

4.5.3 Closing The Period For The System

When all work sets and individuals are closed, close the system period:

1. Go to **Crewing > Payroll > Close Period...**.

   If all the employees are not closed, AMOS will prompt you to close them now. Click **OK**to do so:



2. AMOS will ask you to confirm the system close.
3. Click **Yes** to close the system period.

Once the period is closed all variable transactions become read-only and the payroll period is automatically advanced to the next one. The current balance of the accounts for the closed period is transferred to the new one.

CHAPTER 5 On Board

The On Board functions in AMOS Personnel are for crew and slopchest management.

On Board Administration

Three on board administration registers let you enter and keep track of personal effects belonging to your crew; special items on board; and supernumeraries who may sail on a vessel from time to time.

Slopchest

A vessel's Slopchest is like a shop on board from which the crew can buy various items. Slopchest transactions - purchases, sales, losses, etc. - are registered in the Slopchest - Stock Transactions window to be taken into account for payroll and to maintain inventory.

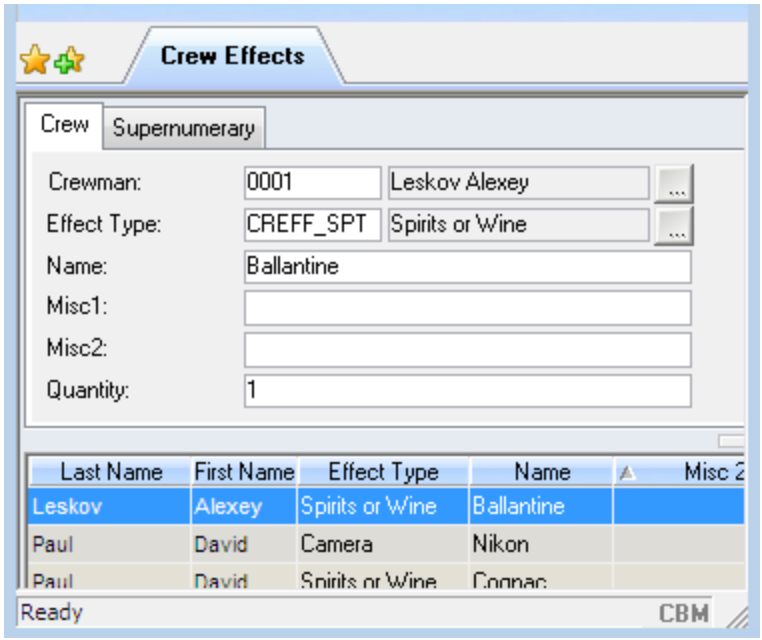
Accounts

Prepare account sheets such as Slopchest, Bonded Stores, Crew Welfare and Master Cash, to be submitted to the head office at the end of each payroll period.

5.1 Registering Crew Effects

Keep a list of personal effects and valuables in the Crew Effects register, to identify ownership and for customs purposes. To add an item:

1. Go to **Crewing > On Board > Administration > Crew Effects**.
2. Open the Supernumerary tab to add an effect for a supernumerary. Otherwise, stay in the Crew tab.
3. Click **New** on the toolbar.
4. Lookup the Crewman/Supernumerary.
5. Lookup an **Effect Type** and fill in the rest of the details:



6. Click **Save**.

5.2 Adding To Ship Stores

Keep a list of special items like televisions, stereo systems, cameras, tobacco, etc., for customs purposes in the Ship Store register. To add an item:

1. Go to **Crewing > On Board > Administration > Ship Stores**.
2. Change the **Vessel** in the filter, or click **OK** to open the window for the current vessel.
3. Click **New** in the toolbar.
4. Lookup the Store Type of item and select a Unit. Enter any other details.
5. Click **Save**.

5.3 Supernumerary

People other than crew members can travel on board a vessel for short periods. These supernumeraries need to be registered:

1. Go to **Crewing > On Board > Administration > Supernumerary**.
2. Click the **New** button in the toolbar.
3. Choose **Next of Kin** or **Service Personnel**.

- **Next of Kin**: lookup the employee he/she is visiting. Then lookup the **Next of Kin** details

registered against that employee:

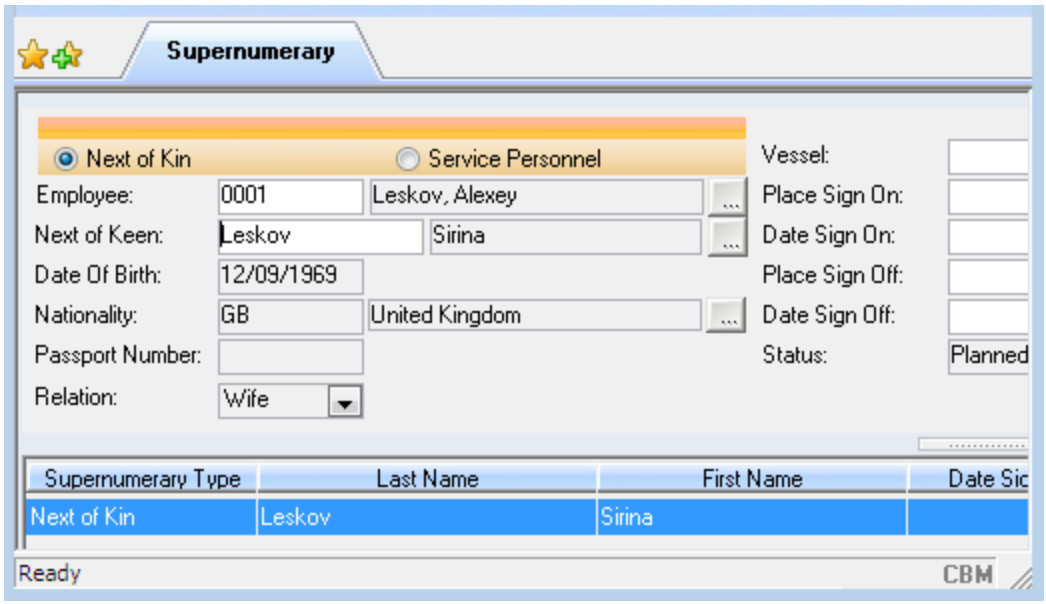


Figure 19 Adding a Supernumerary - Next of Kin

- **Service Personnel**: Fill in the details manually.

4. Lookup the **Vessel** the person is sailing with and add **Dates** and **Places** for sign on/off.
5. **Save** the record.

5.4 Slopchest

A vessel's Slop Chest is like a shop onboard from which the crew can buy various items. Some items are subject to customs regulations (alcohol, tobacco) and inventory of these items is controlled and needs to be declared upon entry into port. These items are kept in a **Bonded Store** which is locked by customs when the ship arrives and can't be opened until it leaves port.

Slopchest transactions - purchases, sales, losses, etc. - are registered in the Slopchest - Stock Transactions window to be taken into account for payroll and to maintain inventory.

Before payroll is closed for any period, all sales to each employee are registered as a single deduction on that person's payroll.

To use the slopchest:

1. Set up a list of available slopchest stock items. See section 5.4.1.

   Keep an eye on your stock in the Stock Control window. See section 5.4.3.
2. Register transactions as they occur. See section 5.4.4.
3. Order more stock as needed. See section 5.4.5.

5.4.1 Registering Slopchest Stock Items

The Slopchest - Stock Items window lists all items on board the vessel for sale from the slopchest. The items are divided into three classes:

- **Slopchest (SC)**. Main storage containing any kind of goods except bonded stores.
- **Bonded Stores (BS)**. Goods normally declared - alcohol, cigarettes, etc.
- **Welfare (WF)**. Subset of goods from both slopchest and bonded stores.

NOTE: Stock items added to the Slopchest - Stock Items window only appear in this window and are not a part of the AMOS M&P **Stock > Stock Items** list.

Adding a New Item

1. Go to **Crewing > On Board > Slopchest > Stock Items**.
2. Click the **New** button.
3. Enter a **Number** and **Name** for the item.
4. Select the **Stock Unit** in which this item is stored: Piece, Each, Barrel, etc.
5. If you have any other details like **Stock/Price Class**, **Stock Average** or **Last Purchased Price/Date**, fill these in.

   TIP

   If you flag the **Stocked Item** box, when searching for the item users can filter for 'Stock Items Only'.

6. Enter quantities for stock levels and reordering:

   Stock Maximum/Minimum. The maximum/minimum quantity of the item required on board.

   Reorder Level. When the stocked quantity reaches this level, AMOS will automatically generate an order to replenish it.

   Reorder Quantity. The quantity placed on order when the stock reaches reorder level. Consider the reorder level and do not allow the reorder quantity to cause the stock maximum to be exceeded.

   Wanted. If you currently require a quantity of the item and the stock has not yet reached reordering level, enter an amount to order manually here.

7. **Save** the item.

TIP

To print a label for the stock item, select it and go to **Options > Print Label**. Enter the **Number of Copies** to print and click **OK**.

To specify the maker of a stock item:

1. Go to **Crewing > On Board > Slopchest > Stock Items**.
2. Select an item.
3. Lookup a **Maker** on the General tab.

   If the manufacturer has a reference like a catalog number for the stock type enter that in the **Maker's Ref** field. Users can filter by both your organisation's name for the stock

type as well as the maker's reference.

5. **Save** the changes.

> **TIP**
> To edit or check the general details about the selected maker go to **Options > Maker**. This opens the Address register with the maker's address and details displayed.

More information about using AMOS Stock functionality in conjunction with the Slopchest - Stock Items window is available in the *AMOS M&P User Guide*:

- **Stock Grades**. Chapter 5 Stock Management > 'Using Stock Grades'.
- **Purchase History**. Chapter 5 Stock Management > 'Stock - Purchase History'.

5.4.1.1 Setting Stock Item Locations

NOTE: New Items can not be added to welfare, but existing items can be moved there from the other stores.

To register a stock item's location in the slopchest or bonded stores:

1. Go to **Crewing > On Board > Slopchest > Stock Items**.
2. Select an item.
3. Click **Add**.
4. Choose the slopchest or bonded stores and click **OK**.
5. You can add stock to both locations. In this case, define a default.

   Select a location and click the **Default** button to flag it with a star.
6. **Save** the item.

To delete a location from the list select it and click **Remove**. Stock transactions will update the **Current Stock** and **Available** fields automatically, as they take place.

5.4.1.1.1 Moving Stock Items from One Location to Another

Although you can not add new stock items to the welfare location, you can transfer quantities of existing items there from the other stores.

Moving a Partial Quantity

To move partial quantities of one item:

1. Go to **Crewing > On Board > Slopchest > Stock Items** and select the item to move.
2. Go to **Options > Move** to open the Move Stock dialog.
3. Select the **Source Location**. The **Destination Location** is already set to 'Welfare'.
4. Enter the **Quantity** to transfer.

   For perishable items, the select an **Expiry Date**.
5. Click **OK**. The dialog closes and the locations list is updated.

Moving the Full Quantity

To move the full quantity of one or several items:

1. Flag one or several items in the Stock Items window.
2. Go to **Options > Move**to open the Move Stock dialog.

3. Select a **Source Location**. The **Destination Location** is already set to 'Welfare'.
4. Click **OK**.

- When you tag one or more items before selecting the **Move Stock** option, the entire quantity of any selected item will be moved from the source location to the welfare stores.
- Any expiry date details automatically follow the stock to the new location, and AMOS creates stock transactions of type 'Transferred In' and 'Transferred Out' for the moved stock items.
- The Overview tab on the Slopchest - Stock Items window provides an overview of all the transaction types that exist for the selected item.

5.4.1.2 Perishable Stock

Mark stock as perishable by flagging the **Perishable Item** checkbox on the Slopchest - Stock Items window.

Add one or more **Locations**to the General tab. When you save this item, the Locations tab is added to the window. The Locations tab will show a read-only overview of stock locations and totals.

Whenever you move a quantity of a perishable item or generate a type of stock transaction for it, you will need to select or provide an expiration date. Moving quantities around means that different 'batches' of items in the same location might have different expiry dates. A breakdown of such dates is shown in the Locations tab.

5.4.1.3 Stock Item Vendors

You may have one or several vendors who supply a particular stock item. To manage a list of available vendors:

1. Go to **Crewing > On Board > Slopchest > Stock Items**.
2. Select an item and open the Vendors tab.
3. Click the **New** button in the tab. This opens the Vendors window.
4. Lookup a **Vendor**. If the vendor has a reference like a catalog number for the stock enter that in the **Vendor's Ref.** field.
5. Use the **Part Description** field to register an alternative description for the selected stock , or, a description in the vendor's local language.

   Whenever this stock is placed on a purchase form the part description will appear in the Line Items window.
6. Provide the **Price** and **Delivery** details. The **Price Updated** field is automatically updated whenever a price is entered or changed.
7. Use the **Min. Order Level** field to indicate the minimum amount of the stock which must be ordered from this vendor at one time[1].
8. **Save** the record. You can add as many as needed.

Close the Vendors window to return to the Slopchest - Stock Items window.

[1]It is also possible to specify a Minimum Order Value on a vendor's address record in the Address register. In that case when issuing a purchase order, AMOS will check that the estimated total cost for all items on the form is greater than or equal to the vendor's set minimum value.

Converting Stock Units to Purchase Units

You might store the stock item in one kind of unit while the vendor sells the same item in another unit. To eventually order this item you need to convert the stock unit to purchase units.

> **EXAMPLE**
>
> Your **Stock Unit** 'Piece' is entered on the Slopchest - Stock Item window General tab and appears in the Vendors window. The vendor sells the same item only by the unit 'Box' with 10 pieces per box. To convert the unit you enter Box in the **Purchase Unit** drop-down field, and 10 in the **Factor** field.

Minimum Order Level

When a **Min. Order Level** is set on a stock item/vendor and a quantity of the stock item is placed on an order form for that vendor, AMOS will verify that the ordered quantity is greater than or equal to the minimum order level set here. AMOS will run the same check when a user attempts to issue a purchase form for this vendor containing a quantity of the stock with a minimum order level defined.

It is up to the user to decide to continue or not with orders containing line items which do not meet minimum order levels.

Preferred Vendors

To specify a preferred vendor:

1. Go to **Crewing > On Board > Slopchest > Stock Items**.
2. Select an item.
3. Use the **Preferred Vendor** lookup on the General tab to select a vendor. If a reference was specified in the Vendors window, it will appear automatically.
4. **Save** the change.

> **TIP**
>
> To edit or check the general details about a preferred vendor, go to **Options > Preferred Vendor.** This opens the Address register with the relevant vendor's address and details displayed.

5.4.2 Selling An Item From The Slopchest

To register the sale or purchase of a stock item quantity from the slopchest:

1. Go to **Crewing > On Board > Slopchest > Stock Items**.
2. Select an item.
3. Go to **Options > Sell**. The Sell Stock dialog opens.
4. Choose a **Source Location**.
5. To move a quantity from the source location to the welfare store, click **Ship**. Enter a **Quantity** and click **OK** to return to the main window with the **Current Stock** updated for the selected item.

   Otherwise, to sell to an employee click **Crew**.
6. Flag one or more employees.
7. Enter a **Quantity** - remember, the same quantity will be sold to each crew member, if you flagged more than one.

8. Click **OK** to return to the main window with the **Current Stock** updated for the item.
9. **Save** and refresh the window.

You will see a record of the transaction in the Stock Transactions tab.

The Overview tab on the Slopchest - Stock Items window provides an overview of all the transaction types that exist for the selected item.

5.4.3 Stock Control

NOTE: Stock items listed in this window are limited to the Stock Items created in **Slopchest > Stock Items**. Stock listed in the AMOS M&P Stock Items window is not included.

Stock items do occasionally get removed from stock without being recorded, so at regular intervals - once a year, once a quarter, or once a month - take inventory to ensure that the actual stock in store matches your stock records.

To print and update a stock list:

1. Go to **Crewing > On Board > Slopchest > Stock Control**.

   The Slopchest - Stock Control window displays the stock items contained in each of the three slopchest stores, according to any criteria you filtered for.
2. Go to **File > Print** to print the list shown in the window, or click the **Print** button on the toolbar.

   Go to the store and perform a physical count of what is actually on the shelves in the storage area.
3. After counting, update the stock quantities: click in the appropriate field in the 'Actual' column and type the correct amount.
4. **Save** the window.

TIP

You might want to define new stock transactions for any missing items or extra items to keep a more complete record of the actions.

5.4.4 Stock Transactions

Transactions are the main way of viewing changes in stock levels on board a vessel. You can view automatically recorded transactions and correct them or add additional information if necessary, in the Slopchest - Stock Transactions window.

There are two ways to open the window:

- Go to **Crewing > On Board > Slopchest > Stock Transactions**.
- A record of all transactions for each item is kept in the Slopchest - Stock Items window Stock Transactions tab. Click **New** or **View** to open the Slopchest - Stock Transactions window just for that item.

Registering a Transaction

To register a new transaction:

1. Open the Slopchest - Stock Transactions window either from the main menu or from the Slopchest - Stock Items window.
2. Click **New**.
3. Record the transaction's details.

4. **Save** the window. This updates the Stock Transactions tab in the Slopchest - Stock Items window and affects current stock levels as well.

- The Overview tab on the Slopchest - Stock Items window provides an overview of all the transaction types that exist for the selected item.
- To connect expenses to a specific budget dimension, like Responsible or Project, go to **Options > Transaction Codes** to lookup and apply a transaction code and value to an item.

5.4.4.1 Reversing A Transaction

You may need to reverse a stock transaction in the Slopchest - Stock Transaction window: for example, one made in error or to return incorrectly delivered goods. To reverse a transaction:

1. Open the Slopchest - Stock Transactions window and select a transaction.
2. Go to **Options > Reverse Transaction**.
3. Confirm the reversal.
4. **Save** the window.

After the transaction has reversed, go to **Options > Reverse Transaction** once again, to return the transaction to its original status.

5.4.5 Order Forms

Open the Slopchest - Order Forms window at **Crewing > On Board > Slopchest > Order Forms**.

The window contains a list of 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.

Throughout the purchasing process you will add information such as line items and quotations to your forms and eventually order and receive your goods.

More information about using AMOS Purchasing functionality in conjunction with the Slopchest - Forms window is available in the *AMOS M&P User Guide*: Chapter 6 Purchasing.

5.4.5.1 Stock Items And Outstanding Purchase Forms

The Outstanding Forms tab on the Slopchest - Stock Items window shows you what items you have placed on forms and are still waiting for. Once all items in an order have been received, the Outstanding Forms tab will no longer show that order.

5.5 Accounts

AMOS Personnel helps you to prepare various account sheets such as Slopchest, Bonded Stores, Crew Welfare and Master Cash, to be submitted to your head office at the end of each payroll period.

Templates

Create a template for each type of account sheet.

Account Sheets

Keep track of the cash flow on board each vessel using account sheets.

Master's Cash

A certain amount of cash is usually stored on board a vessel in the Master's safe.

5.5.1 Templates

You can create a template for each type of account sheet:

- Slopchest Account
- Bonded Stores Account
- Crew Welfare Account
- Master's Cash Account

These templates define what information is included in the account sheets and how they will look.

Setting up a New Template

To set up a new account sheet template:

1. Go to **Crewing > On Board > Accounts > Templates**.

   There is one tab for each of the account sheet types.
2. Open a tab.
3. Click the **New** button in the toolbar.
4. Click in the **Value** sign field and choose NONE (credit) or NEGATIVE (debit).
5. Click in the **Line Function** field and select a function. The function is also entered automatically in the **Description** field.
6. Depending on the function, you may need to select a **Grouping** value also - a wage type.
7. **Save** the template.

View the account sheets you have created in the Account Sheets window.

5.5.2 Account Sheets

Keep track of the cash flow on board each vessel using account sheets. View the status value of each account at any time during a payroll period on board.

To see an account sheet, go to **Crewing > On Board > Accounts > Account Sheets**. Each type of account is kept on a separate sheet in its own tab.

If you manually change the **Value** on any account sheet, go to **Options > Refresh Accounts** to update the account.

To close the transaction period[1] for an account sheet, select it and go to **Options > Close Transaction Period**.

5.5.3 Master's Cash

A certain amount of cash is usually stored on board a vessel in the Master's safe, used for:

- Paying employee cash advances
- Other payments
- Reimbursement

[1]To close the transaction period there must be at least one cost centre and one account code defined for the department,and the user needs access to that cost centre.

This cash is called the Master's Cash. Use the Master Cash window to register such transactions as they occur. The General tab lists the amount in each currency which you hold. Before payroll is closed for any period, each employee's master cash transactions are added to or deducted from their payroll.

5.5.3.1 Adding Money To The Masters Cash

When you receive money to add to the master's cash on board, register this transaction:

1. Go to **Crewing > On Board > Accounts > Masters Cash**.
2. Click **New** in the toolbar.
3. Enter the **Amount** and currency.
4. Select **Transaction Type** 'received'.
5. **Save** the entry.

5.5.3.2 Registering A Master Cash Transaction

To register a transaction in the master's cash:

1. Go to **Crewing > On Board > Accounts > Masters Cash**.
2. Click the **New** button on the toolbar.

   The **Period** and **Period Year** fields indicate the payroll period you are working in. Once a period is closed the records will become read only - only records from the current payroll period can be edited.
3. Select a **Transaction Type**.

   If you select cash advance, the **Destination** field appears. Select the name of the person this transaction applies to.
4. Enter an **Amount** and select a currency.
5. **Save** the transaction. The transaction will also be added to the appropriate payroll account(s).

- To reverse a transaction, select it and go to **Options > Reverse Transaction**.
- To connect expenses to a specific budget dimension, like Responsible or Project, go to **Options > Transaction Codes** to lookup and apply a transaction code and value to a master's cash transaction.

CHAPTER 6 Personnel Registers

The following section is a brief description of the registers pertaining to the AMOS Personnel module of the Business Suite. For detailed information about all registers in the system, see also the *AMOS Business Suite Reference Manual.*

6.1 What Is A Register?

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.

6.1.1 Are You Allowed To Do This?

The registers are used to create the initial database at the time of the application's installation. Authorised personnel can update these registers as details change. The register is set up at the main office, and the information entered must be distributed to the individual sites before data can be entered and exchanged.

In most organisations, only a few users will be authorised to update registers, and depending on your position and responsibilities you may have access to some without having access to all of them.

If AMOS does not respond when you try to change a register, it is probably because you are not authorised to use the commands in question.

6.1.2 You Know You Need To Update A Register When...

When AMOS is installed locally, for example on a ship or at a factory, the registers already contain the background information for your work, data that does not change very often, and that you will use and re-use; for example currency types, vendor addresses, stock numbers and descriptions, and job descriptions.

When this background information changes you will need to update your registers. For example:

- New currency exchange rates are approved.
- A vendor sends notice that their firm is moving to a new address.
- New equipment is installed at your site, and there are new items to be given numbers and kept in stock.

Or you may notice that you cannot find the value you need in a drop-down list or a selection list.

Another reason to get acquainted with the registers is that they have space for information that you use very rarely and never see in other places in AMOS, such as component serial numbers.

6.1.3 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**.

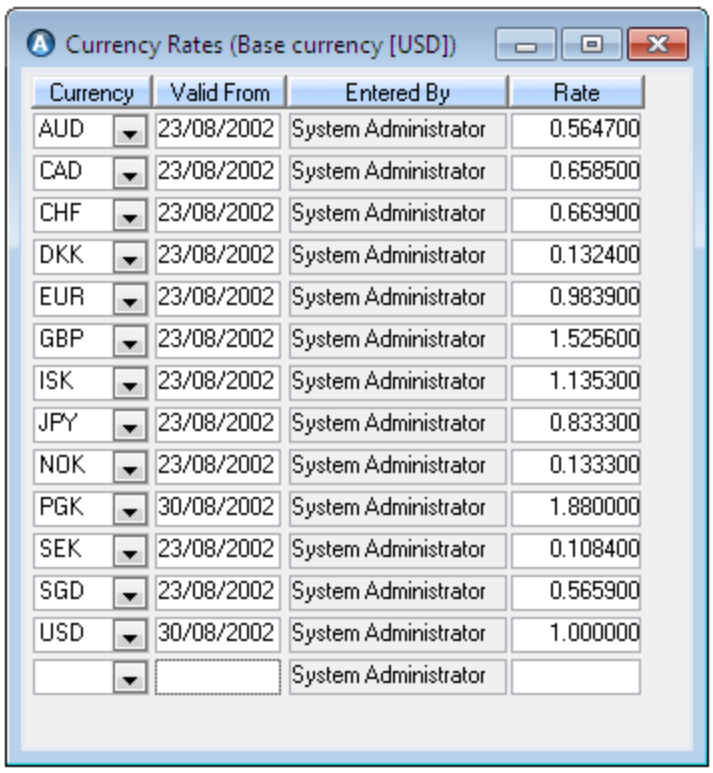


Figure 20 The Currency Rates register

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.

6.1.4 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.

6.2 Finding The Right Register To Update

The Personnel and Payroll registers store information about your crew members and other data relevant to crew administration. The information in some registers is used in others of the same group, and so to access the information needed for one register, it must have already been entered into the register it inherits from.

The Personnel registers are accessed at **File > Open Register > Personnel**. The list opens in a new window where the registers themselves are grouped into folders.

Register Name	Description
Activity	Lists the various activities an employee in the company could be engaged in. Examples of activities could be 'Active on board', 'Inactive on leave', 'Training', 'Sick leave' etc. The activities are used in the Service tab of the Employee Overview window.
Company	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.
Evaluation Criteria	Lists the various criteria used when performing evaluations on company employees. The criteria are used in the Employee Overview Service tab under the Evaluation button.
Evaluation Grade	Defines the various grades used when performing evaluations on company employees. The grades are used in the Employee Overview Service tab under the Evaluation button.
Leave Days	Use in combination with the Sailing Period and the Contract Leave Days registers to define the number of days off an employee earns per working day. The values defined here will apply to the entire workforce.
Manning Agents	Lists the names and addresses of the agents used to provide crew members to the vessel.
Rank	Lists the various ranks used in the company. The ranks are used in two places in AMOS Personnel; in the Employee Overview > General tab and in the Employee Overview > Contract tab.
Rank Type	Defines the various types of rank the employees may have. The rank types are used in the Rank register.

Register Name	Description
Ship Category	Lists the types of ships owned by the company. Examples could be RoRo Ferry, Oil tanker, Dry bulk carrier etc.
Trade	Lists the trade areas frequented by the vessels. Examples could be continents, sea areas etc.
Vessel	Contains the details of all the vessels connected to the company.
Vessel Characteristics Type	Defines the various Vessel Characteristic Types used when registering the company vessels into AMOS Personnel.
Vessel Department	The company may divide a vessel into departments to simplify the organisation. This register enables you to input the departments used by the company.
Category	Contains the codes and descriptions of the various categories of personnel within your organisation.
Contract Leave Days	Defines the codes to be used in the employees' contracts for the number of leave days earned per working day. The data is used in the Employee Overview > Contract tab, and when calculating leave due.
Disability Grade	List of the various grades of disability that employees may suffer while sick.
Employee Address Type	Lists the possible address types that may be used by an employee. Examples could be Primary, Secondary, Temporary, etc.
Family Relation	Lists possible types of family relations that an employee may register as next-of-kin.
Institute	Defines the various educational institutes and schools that an employee may have attended to gain his qualifications.
Marital Status	A list of possible marital statuses that a company employee may have.
Sailing Period	Use in combination with the Leave Days and the Contract Leave Days registers to define the number of days off an employee earns per working day. Go first to the Leave Days register and define the leave days types, then go to the Contract Leave Days register and define the contract codes, then come to this register and define the sailing periods.
Sickness	A list of the various illnesses.
Sickness Nature	A list of possible natures of various illnesses that employees may contract.
Sickness Type	A list of illness types.
Standard Document	Standard documents are 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.
Standard Document Type	This register is for creating certificate and document categories to add to the list in the Employee Overview > Educ.License tab.
Termination Reason	Defines the reasons that an employee's contract may be terminated.

Register Name	Description
Trade Union	Defines the names and codes of the various Trade Unions to which employees can belong, with fees and maximum amounts.
Airports	A list of the airports that employees may need to use.
Crew Effect Type	Defines the types of personal effects the crew members can have, for use in customs declarations.
Ship Store Type	Defines the types of Ship Stores.
Slopchest Departments and Location	This register is for creating the dedicated departments and locations that are used by the Onboard Administration module.
Slopchest Stock Class	The items defined in this register populate the Stock Class field in the Slopchest > Stock Item filter and window.
Employee Details	A set of buttons is defined as default for applicable tabs in the Employee Overview but these can be changed or added to. Once 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 will be displayed.

The Payroll registers are accessed at **File > Open Register > Payroll**. Because some information in certain registers is drawn from other registers, the listed order below is the suggested order for setting up the payroll registers.

Register Name	Description
Accumulators	Defines the codes and descriptions for the various accumulators that wage types can be linked to in order to be accumulated. Accumulated wages are carried forward month by month. Accumulators can be linked to any wage type and are shown in the Fixed Transaction tab and Accumulators tab of the Employee Overview window.
Bank	Contains details of the banks used by the employees.
Bargain Agreement	Defines the details of any bargain agreements between your company and its employees. Wage types and wage rates for each rank are linked to the bargain agreements and the bargain agreements are then linked to employees.
Currency Rounding	Lists specific currencies which should be rounded. These currencies are then rounded in the payroll functions.
Period	Defines the Month and Year of the first period when you start using the payroll. When you close a period a new row is automatically added to the list, and previous periods cannot be deleted.
Wage Type	Contains the details of every wage type employees can hold.

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