

AMOS Business Suite

Version 10.0.00

Q&S 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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Phone: Russia +7 812 324 5110

Additional Manuals

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Comments and Suggestions

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

documentation@spectec.net

CHAPTER 1 General Information

This User Guide is for users of the AMOS Quality & Safety (AMOS Q&S) module Q&S version 9.3. 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 Q&S in fulfilling those requirements.

AMOS Q&S is a module for integrated management of Quality and Safety including procedures, circulars, non-conformities and incidents. The AMOS Q&S module works in conjunction with the AMOS Business Suite (license required).

1.1 Who Should Read The User Guide?

This User Guide is for people using an AMOS Q&S system that is already up and running. The guide contains information on how to:

- Log in to the system and operate the various parts of the main program window.
- Use AMOS Q&S to set-up a system within your organisation to improve the quality of all the work performed.
- Understand the system of document control in AMOS Q&S, and find other useful information.

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

1.2 How This User Guide Is Organised

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

The main features for Quality and Safety are found in Chapters 3 to 5.

Chapter 6 contains some information about the Q&S 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.

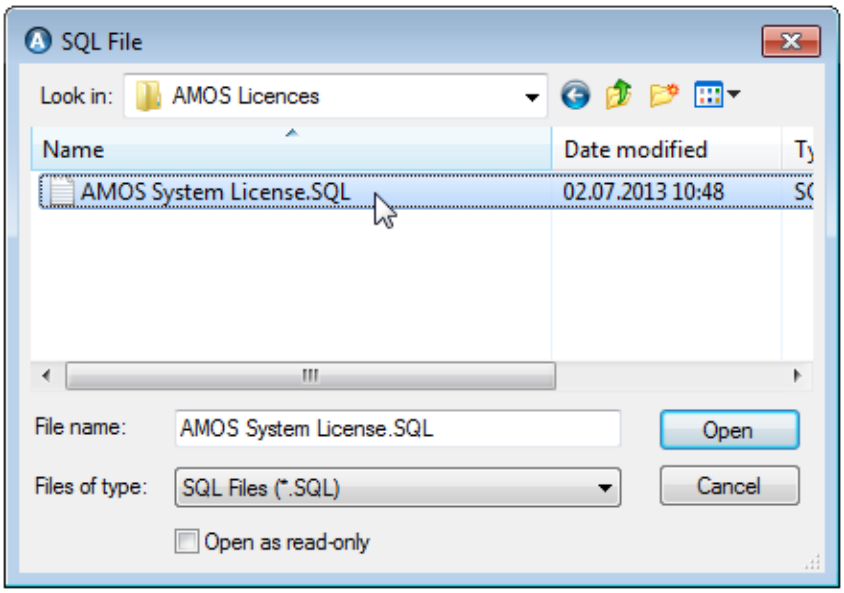
NOTE: Your organisation may use one or more additional security options available within AMOS such as complex passwords, maximum password age, minimum password length, maximum number of logon attempts and/or restriction of recently used passwords when registering a new one. Ask your system administrator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

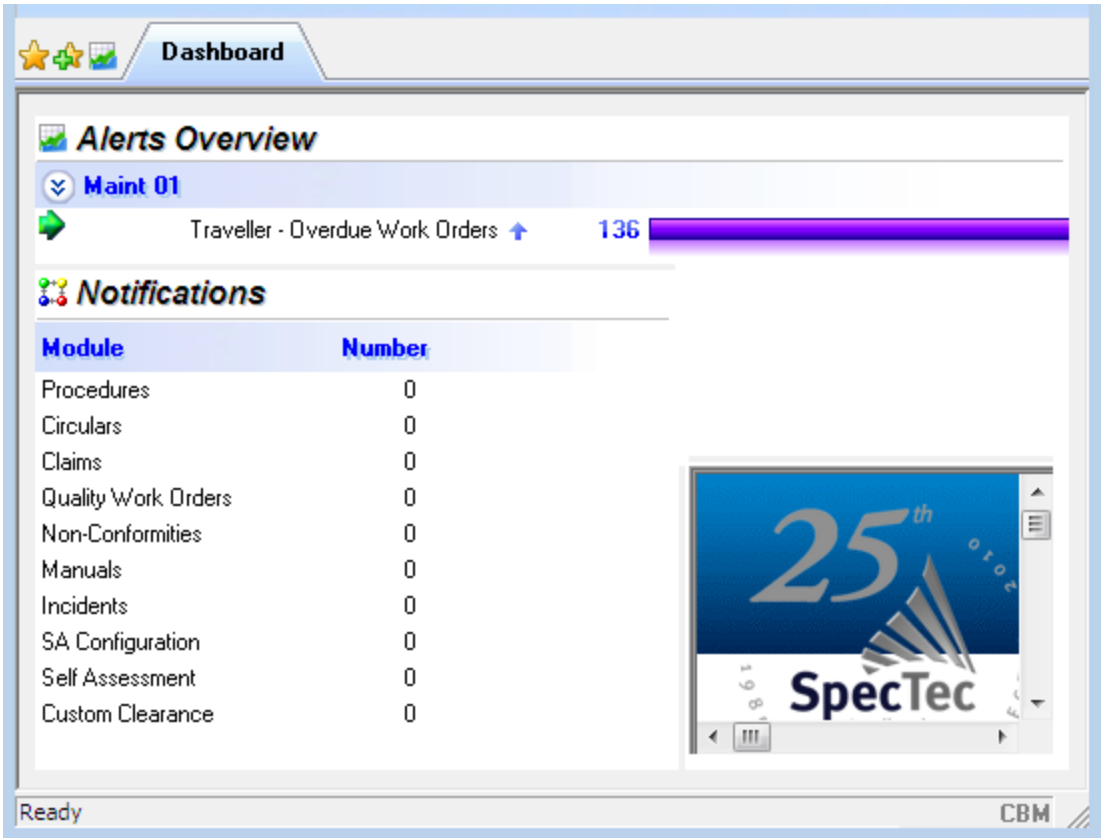
AMOS Business Suite opens to a customisable Home Page, or Dashboard. You can add convenient information to the dashboard like alerts and work flow notifications.

To switch the Dashboard on and off:

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

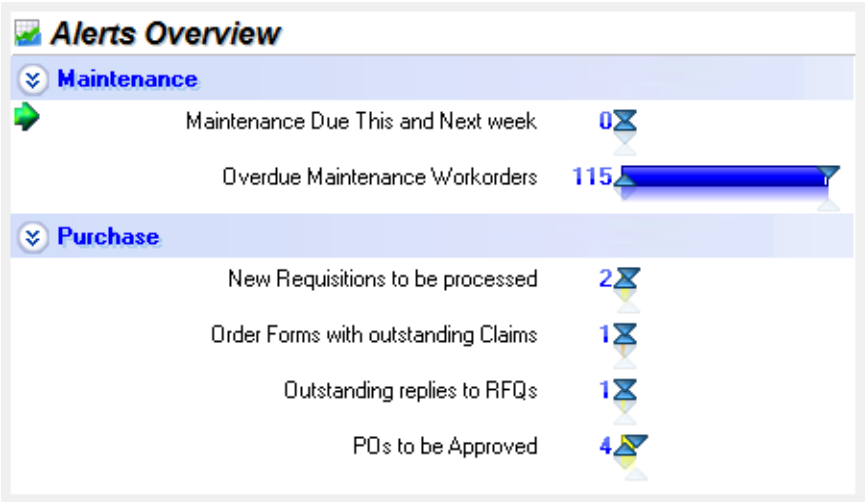


2. Check or clear the **Enable Dashboard** checkbox.
3. Click **OK** to close the window and apply your setting.



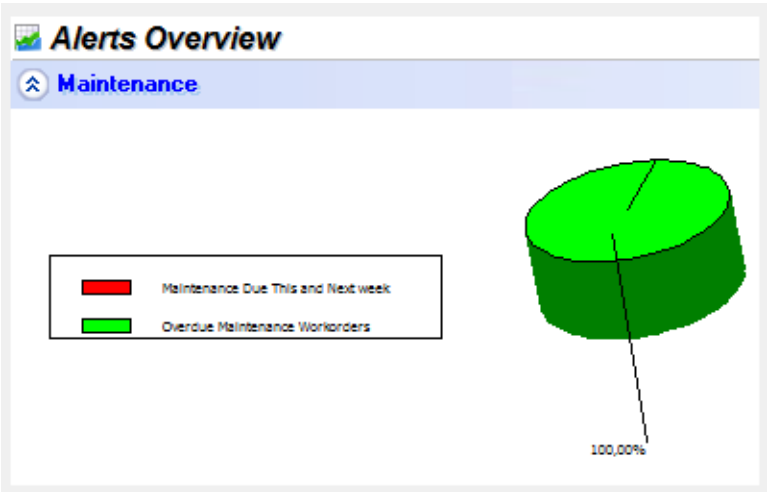
2.2.1 Alerts Overview

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.



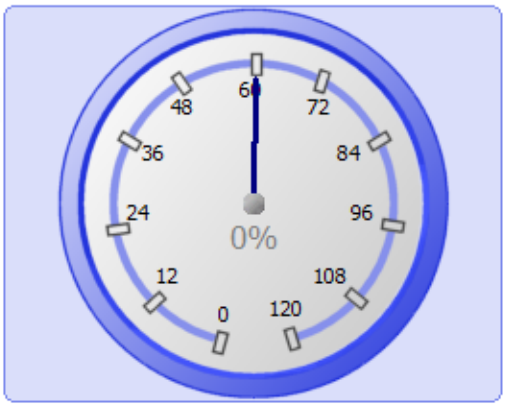
Double-clicking an alert opens the relevant window with the list of records. Right-clicking in the Alerts Overview opens a pop-up menu. You can choose to **Refresh** the Alerts, **Open** the selected one, or **Print** the contents of the Alerts Overview.

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:

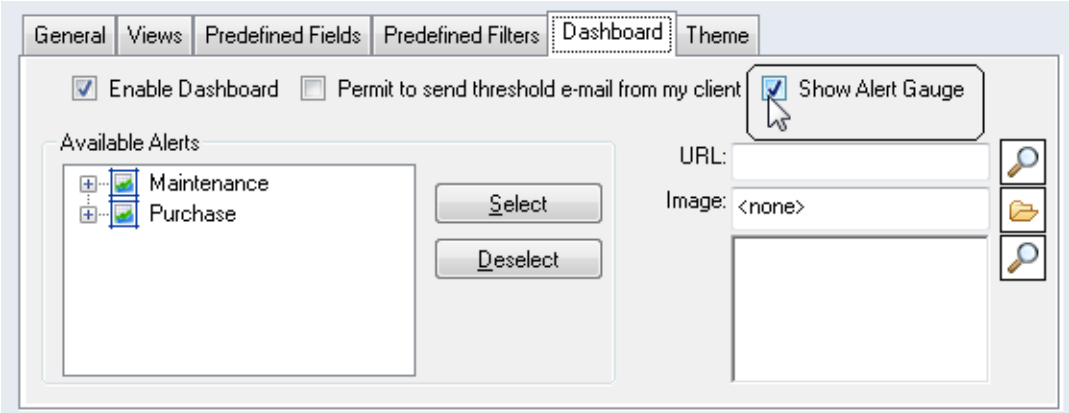


Alerts can also be configured with a set threshold indicating the maximum acceptable value on the given alert. If this threshold is crossed the alert bar and label will change colour and AMOS can send an email to the responsible users.

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.

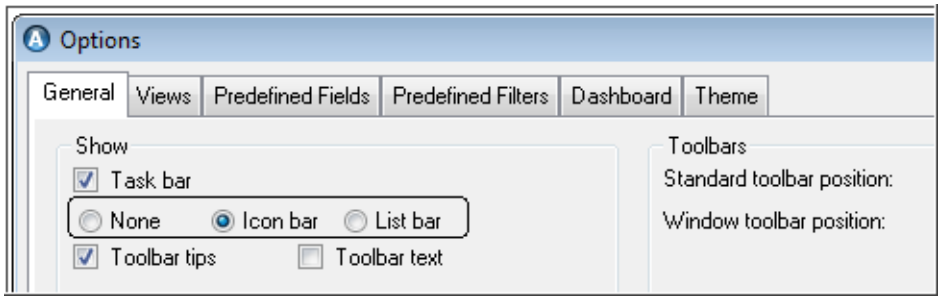
To set the number of seconds between checks for unacknowledged notifications:

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

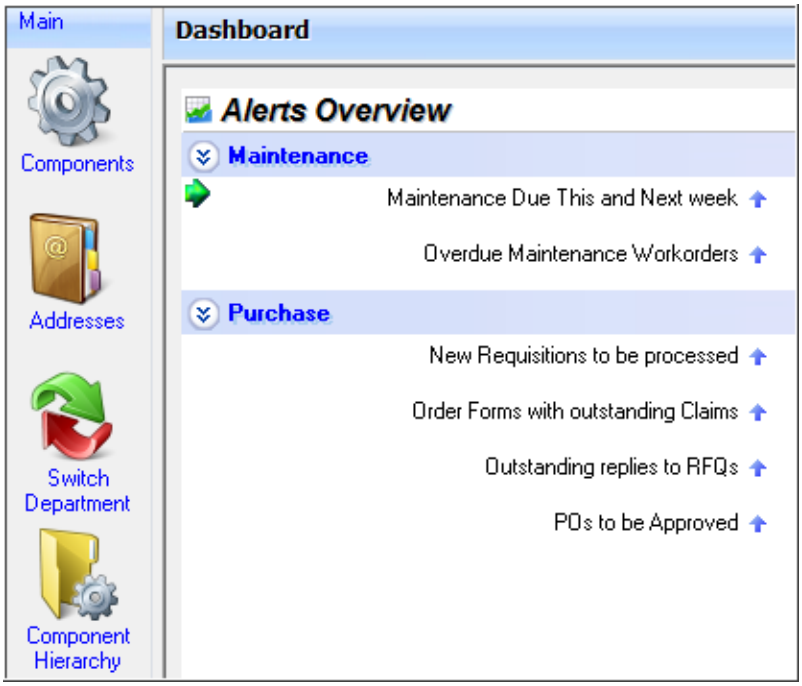
You can choose to have an Icon bar or a List bar present:

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.

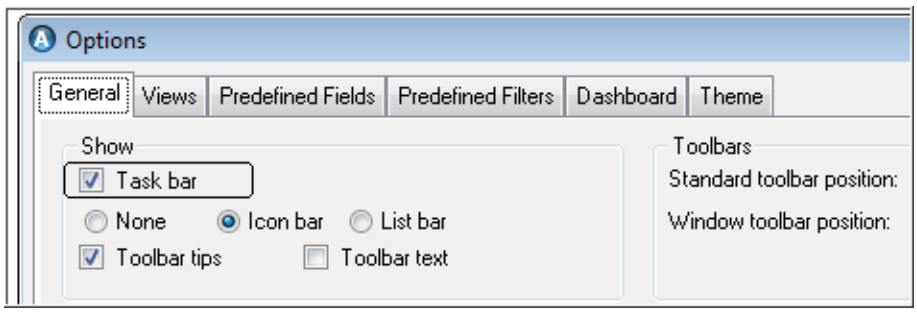
The List bar/Icon bar appears on the left hand side of the Dashboard and contains shortcuts to main areas of the application:



Once enabled, it is visible from any window.

You can also show or hide the task bar:

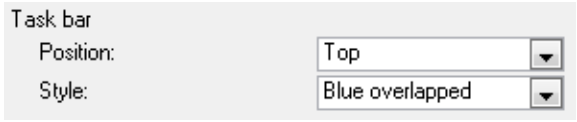
1. Go to **Tools >Options** and check or clear the **Task Bar** checkbox in the General tab:



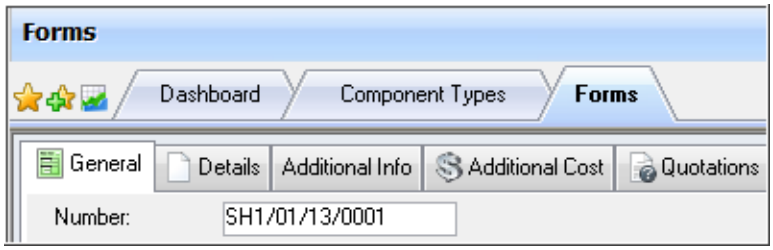
2. Click **OK** to exit the dialog with your setting applied.

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

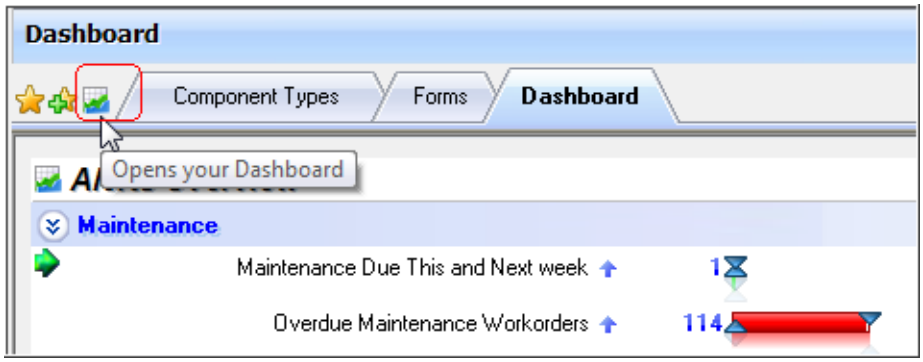
1. Go to **Tools > Options** and switch it on in the General tab.
2. Open the Theme tab and select a **Position** and **Style** for the task bar:



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:

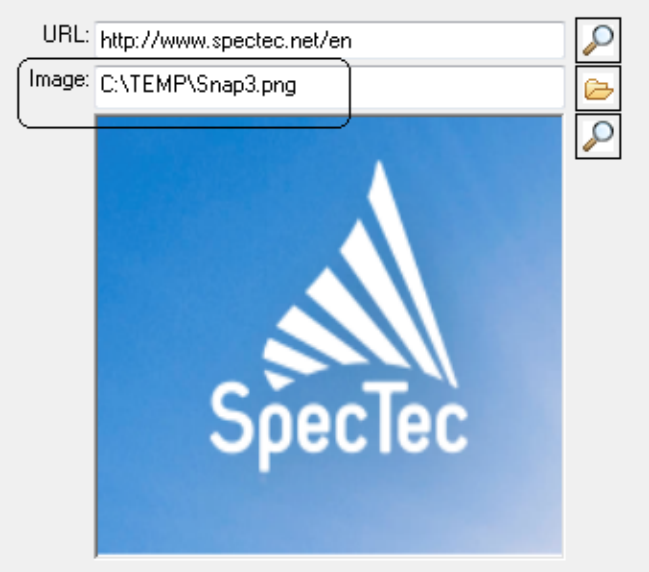
   move the webpage to the right side lengthwise, or

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.

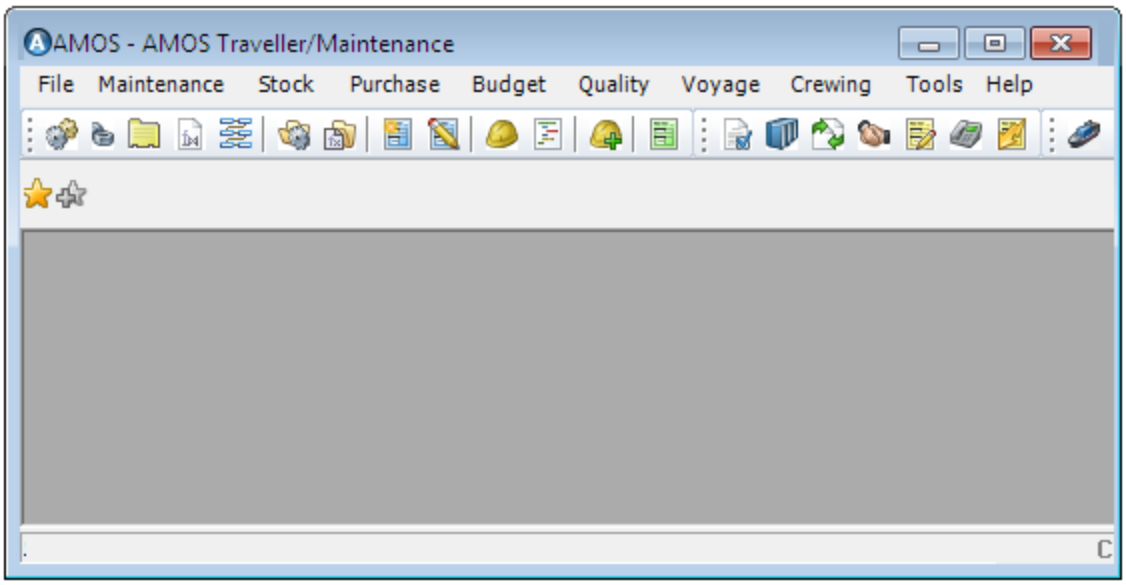
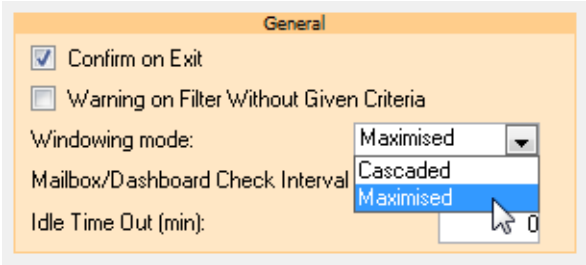


Figure 2 The AMOS Business Suite opening window

To set the default window opening mode:

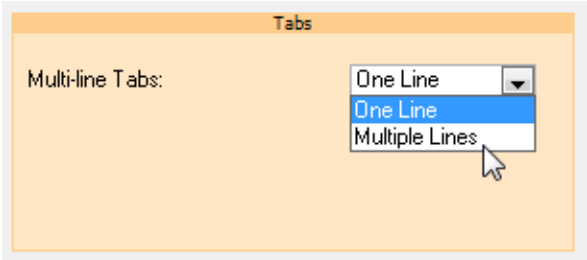
1. Go to **Tools > Options**.
2. Select 'Maximised' or 'Cascaded' from the **Windowing mode** drop-down on the General tab:



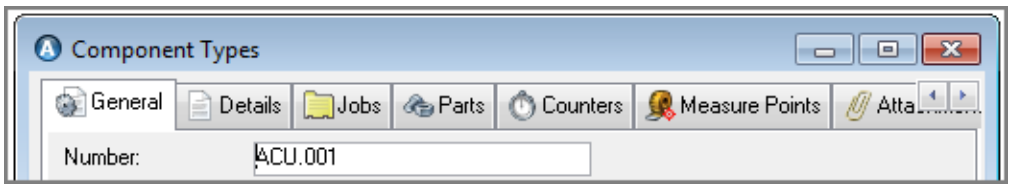
3. Click **OK**.

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

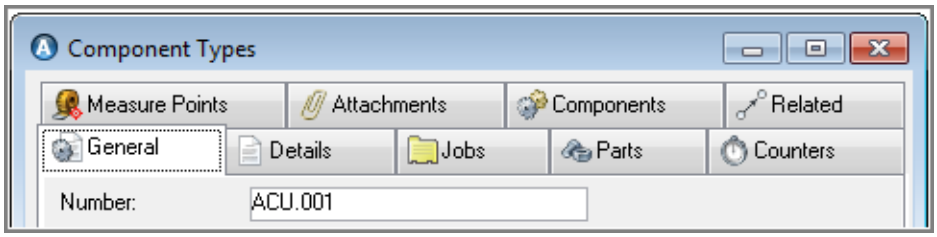
1. Go to **Tools > Options**.
2. Select a tab behaviour from the **Multi-line Tabs** field on the General tab:



'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.

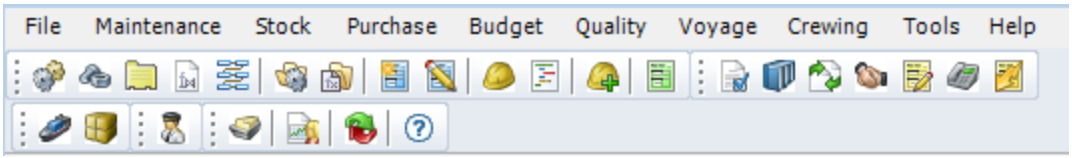


Figure 3 Navigation Bars

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.

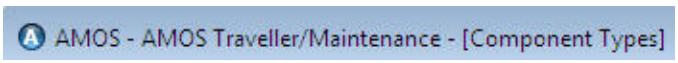


Figure 4 Window Title Bar

2.3.2 The Menu Bar

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

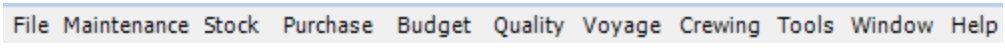


Figure 5 Menu Bar

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.

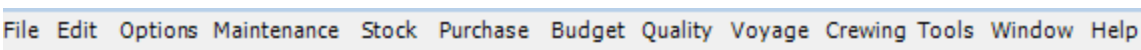
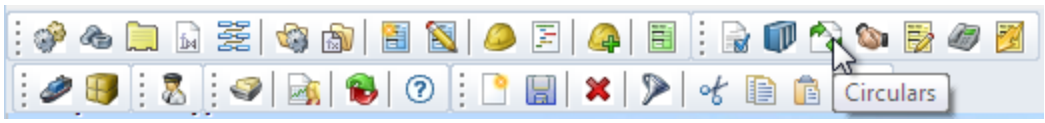


Figure 6 Extended Menu Bar

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:

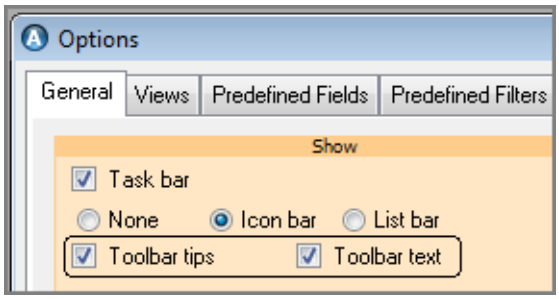


To set the toolbar's position:

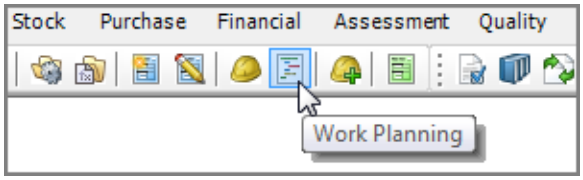
1. Go to **Tools > Options**.
2. Select an option - top, bottom, left, right or hidden - in the **Standard toolbar position** field on the General tab.
3. Click **OK**.

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:

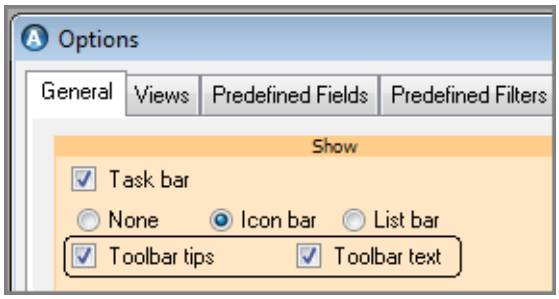
1. Go to **Tools > Options**.
2. Select an option - top, bottom, left, right or hidden - in the **Window toolbar position**

field on the General tab.

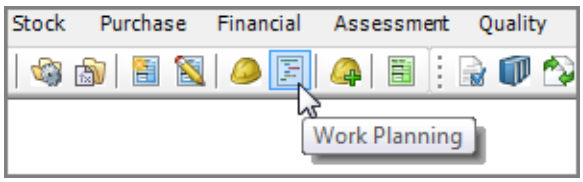
3. Click **OK**.

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.

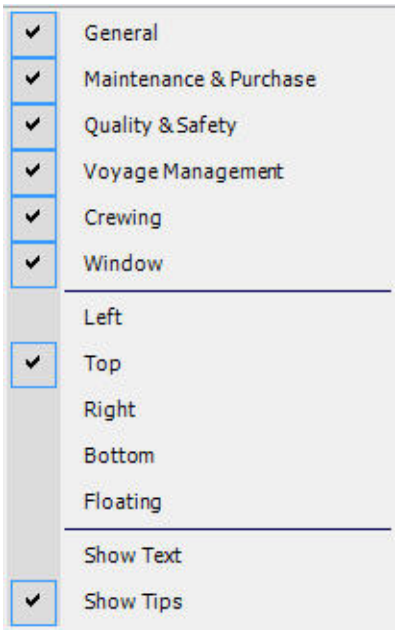


Figure 7 Customise Toolbar Menu

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**.

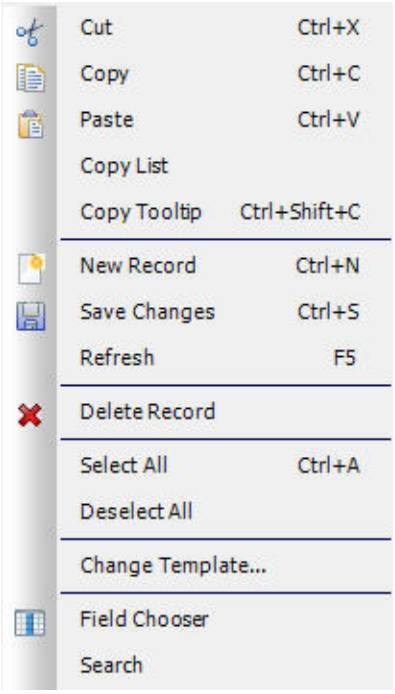


Figure 8 A Typical Edit Menu with Shortcut Keys

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

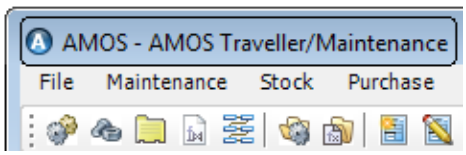
The AMOS Business Suite contains functions to handle complex organisations. You can divide your organisation into installations (any office or site where AMOS is installed) and divide these installations into departments. To view your company's list of defined installations and departments, select **File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

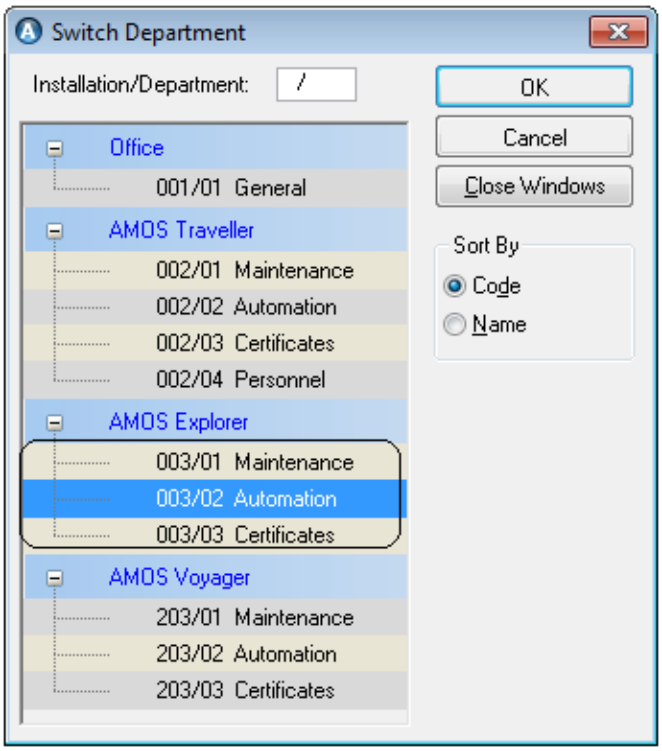
The top line of the AMOS window shows your current Installation/Department:



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;

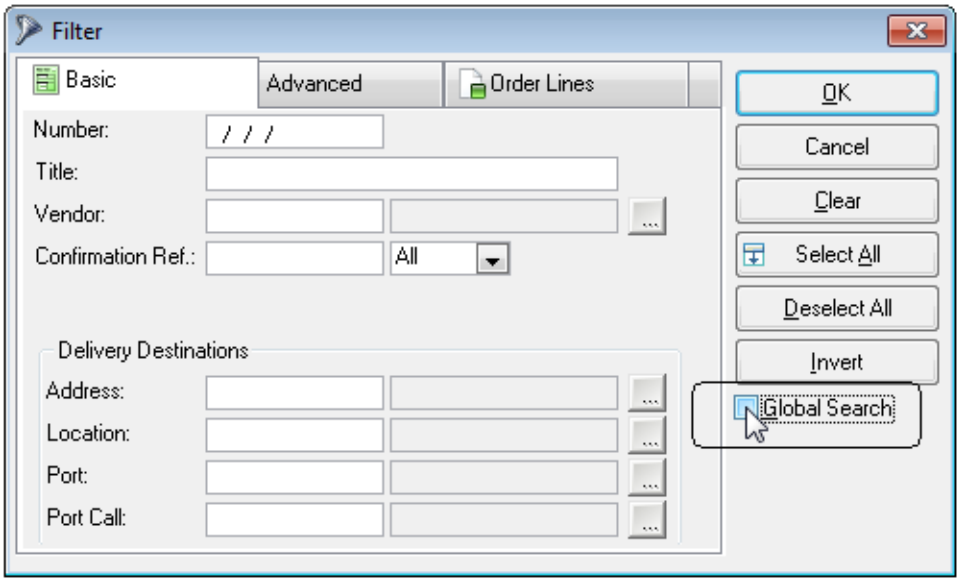
One Buyer is responsible for purchasing consumables on all vessels;

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.

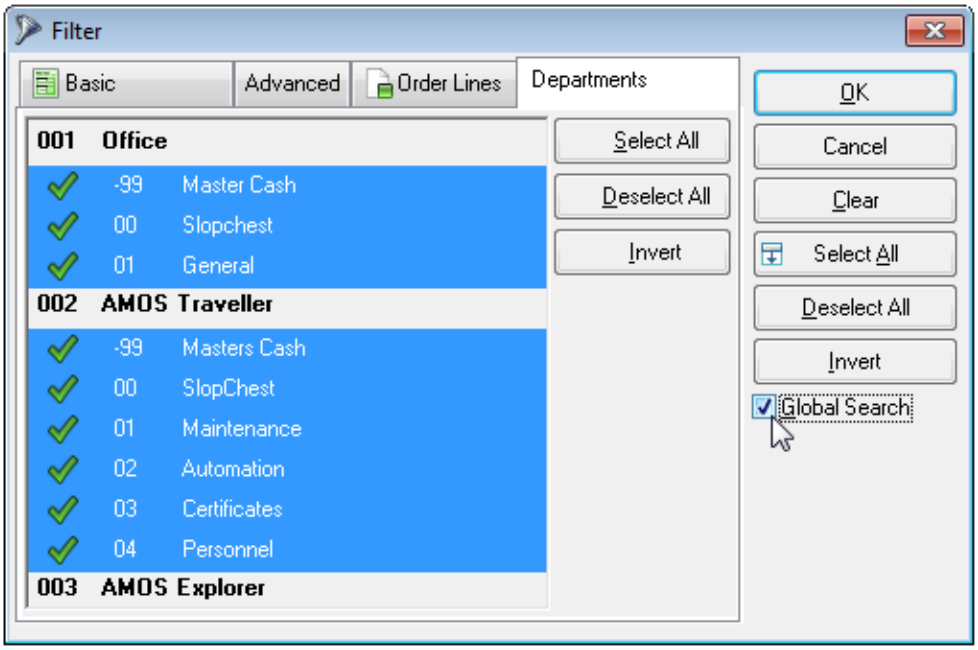
To activate global searching:

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

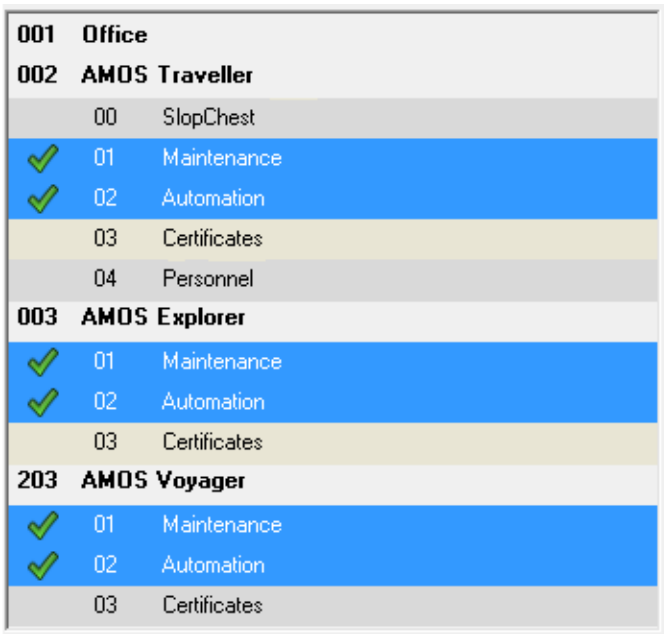


2. The Departments tab will appear in the filter, showing all the installations/departments that you have access to:

[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.



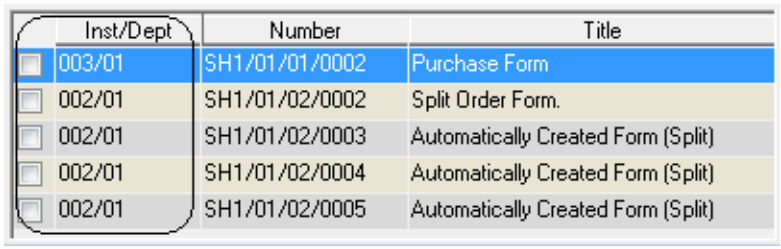
3. Flag installations/departments you want to search in the Departments tab:



> **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.

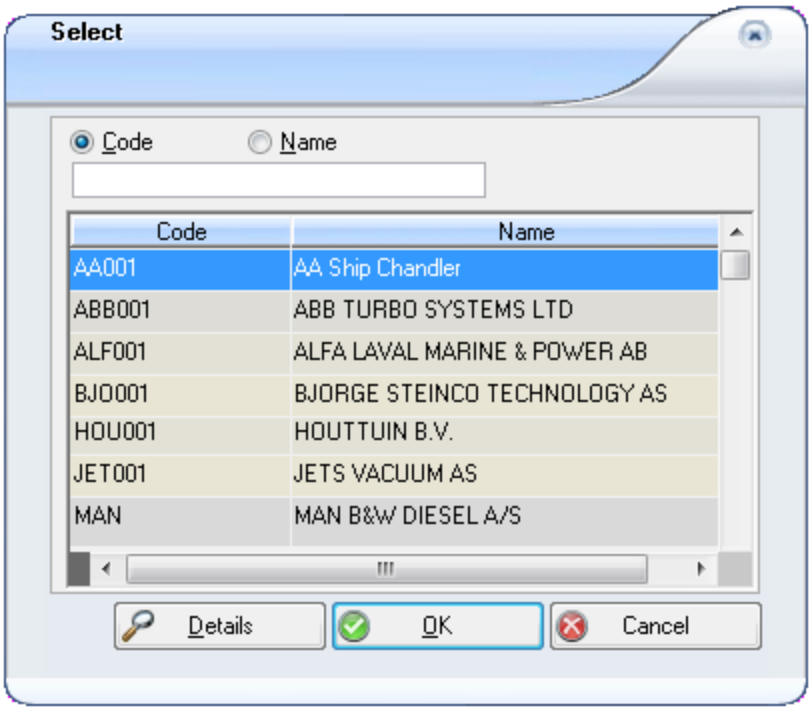
The **Inst/Dept** column is added to the list part of a window in Global mode, showing you where each record came from:



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.

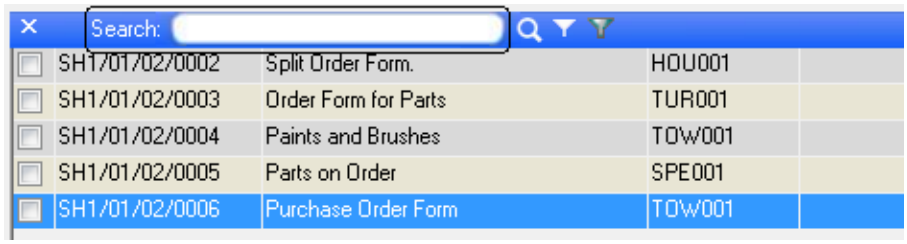
> **TIP**
> If you know the starting letter or number of the record you are searching for you can enter it into the field before clicking the lookup button. This restricts the look-up list to records beginning with the letter/number you entered.

2.4.5 Searching Inside A Window

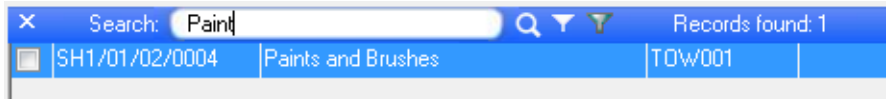
Whether you have already filtered a window or not, you can search the listed records:

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

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



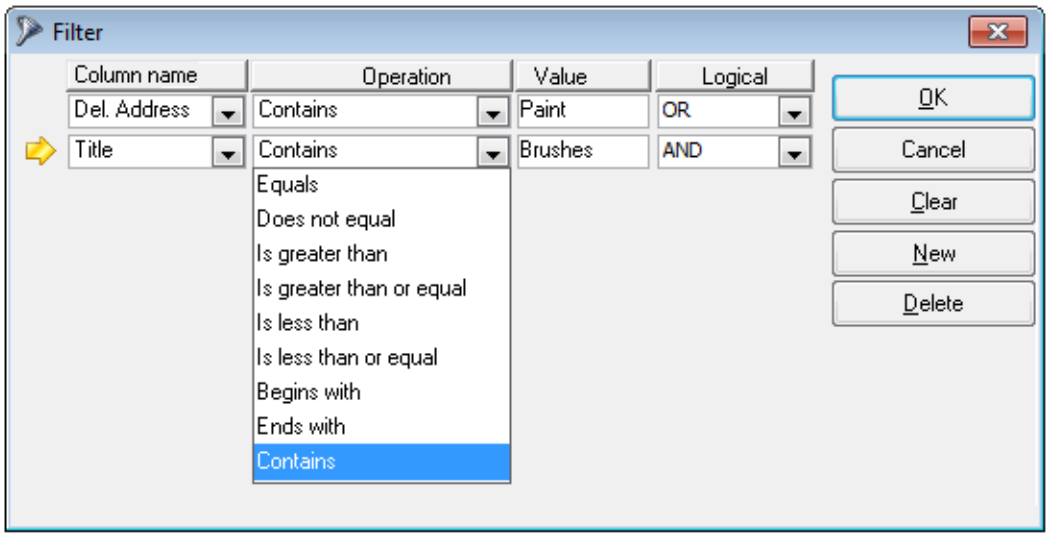
2. Type some text into the field and press **Enter** or click the magnifying glass icon to return results:



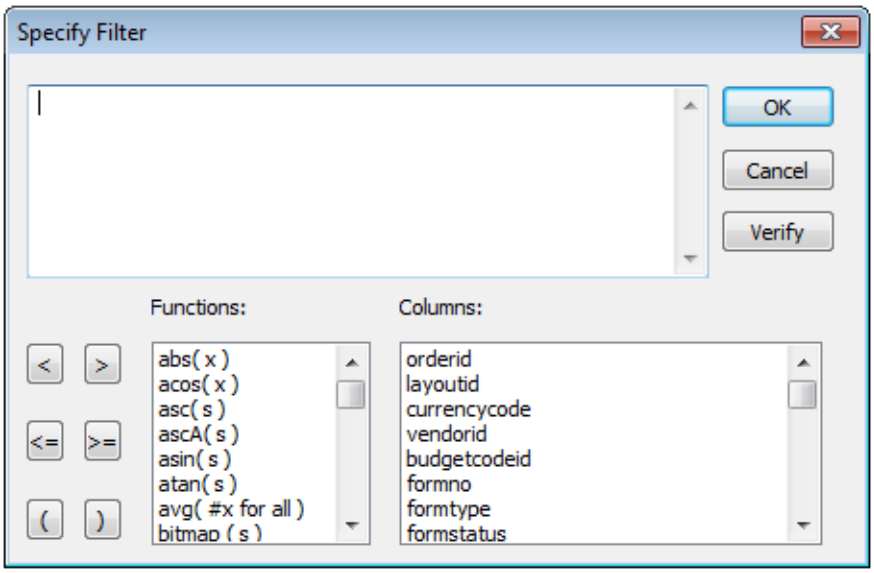
3. Clear the **Search** field and hit **Enter** again to go back to the previous full list.

TIP

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

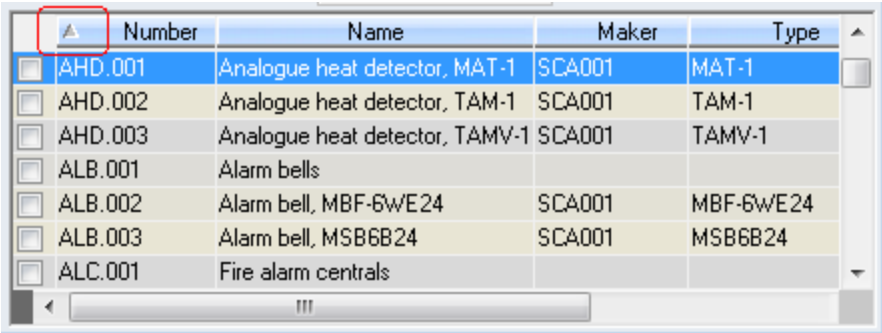


Or, click the shaded filter button to open an advanced search window:



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:



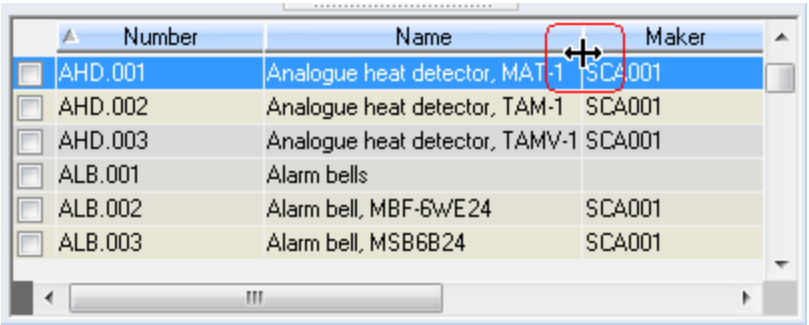
Number	Name	Maker	Type
AHD.001	Analogue heat detector, MAT-1	SCA001	MAT-1
AHD.002	Analogue heat detector, TAM-1	SCA001	TAM-1
AHD.003	Analogue heat detector, TAMV-1	SCA001	TAMV-1
ALB.001	Alarm bells		
ALB.002	Alarm bell, MBF-6WE24	SCA001	MBF-6WE24
ALB.003	Alarm bell, MSB6B24	SCA001	MSB6B24
ALC.001	Fire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

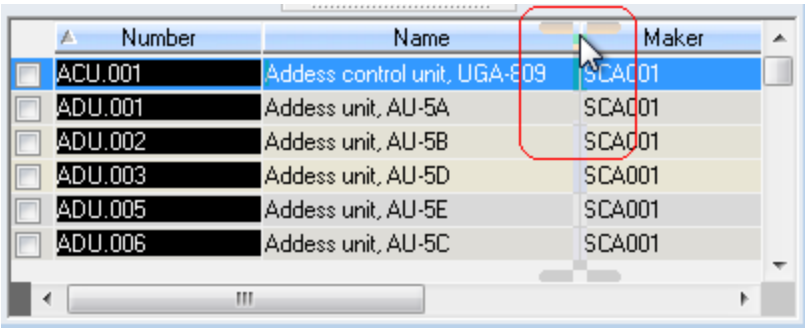


Number	Name	Maker
AHD.001	Analogue heat detector, MAT-1	SCA001
AHD.002	Analogue heat detector, TAM-1	SCA001
AHD.003	Analogue heat detector, TAMV-1	SCA001
ALB.001	Alarm bells	
ALB.002	Alarm bell, MBF-6WE24	SCA001
ALB.003	Alarm bell, MSB6B24	SCA001

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:

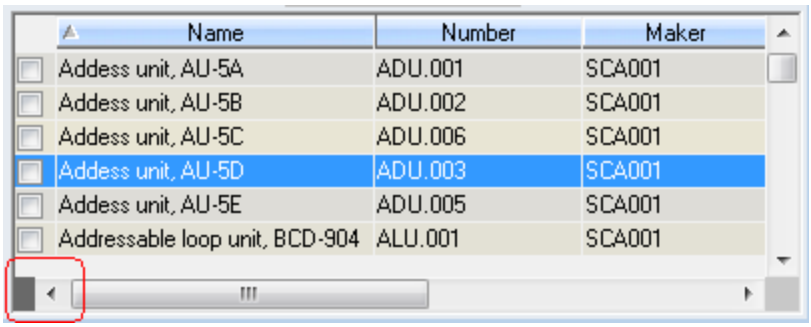


Figure 11 A split line in the list

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:

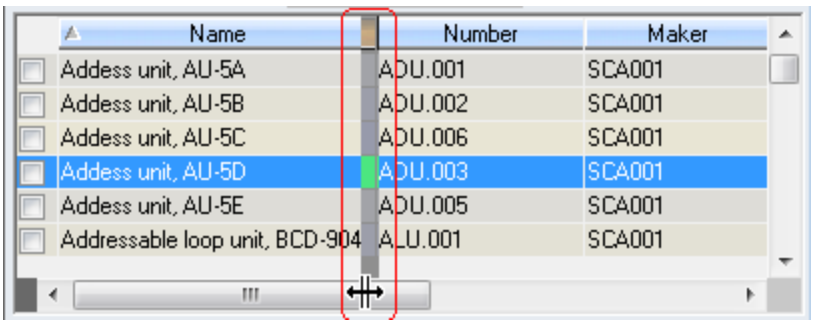
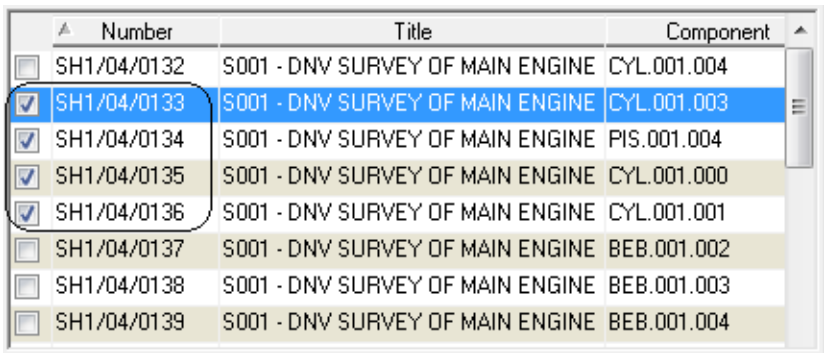


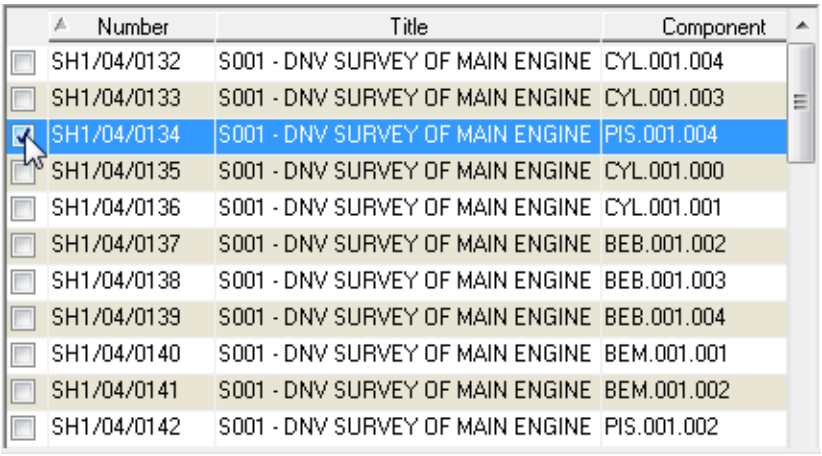
Figure 12 Dragging the split line

2.4.9 Multi-Selecting

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

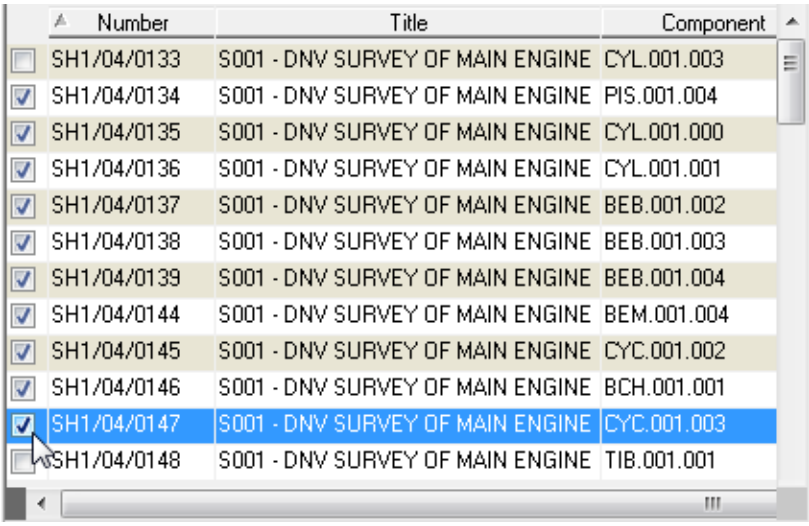


To tag a large number of consecutive rows, tag the first row to select it:



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:



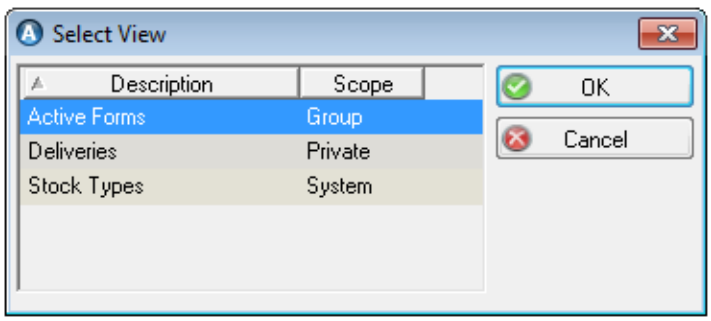
Number	Title	Component
SH1/04/0133	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.003
SH1/04/0134	S001 - DNV SURVEY OF MAIN ENGINE	PIS.001.004
SH1/04/0135	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.000
SH1/04/0136	S001 - DNV SURVEY OF MAIN ENGINE	CYL.001.001
SH1/04/0137	S001 - DNV SURVEY OF MAIN ENGINE	BEB.001.002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

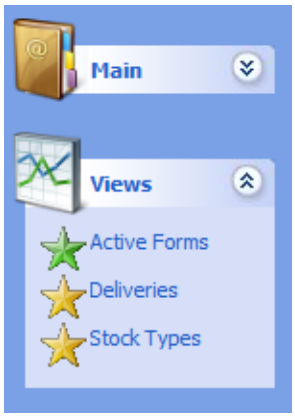
Go to **Tools > Select View** or press the **F6** key. The Select View dialog opens:



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:

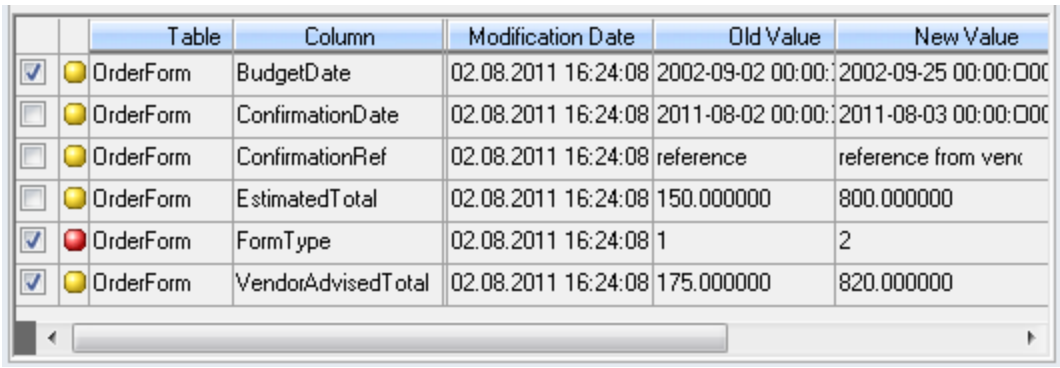


		Table	Column	Modification Date	Old Value	New Value
☑	🟡	OrderForm	BudgetDate	02.08.2011 16:24:08	2002-09-02 00:00:	2002-09-25 00:00:00
☐	🟡	OrderForm	ConfirmationDate	02.08.2011 16:24:08	2011-08-02 00:00:	2011-08-03 00:00:00
☐	🟡	OrderForm	ConfirmationRef	02.08.2011 16:24:08	reference	reference from ven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

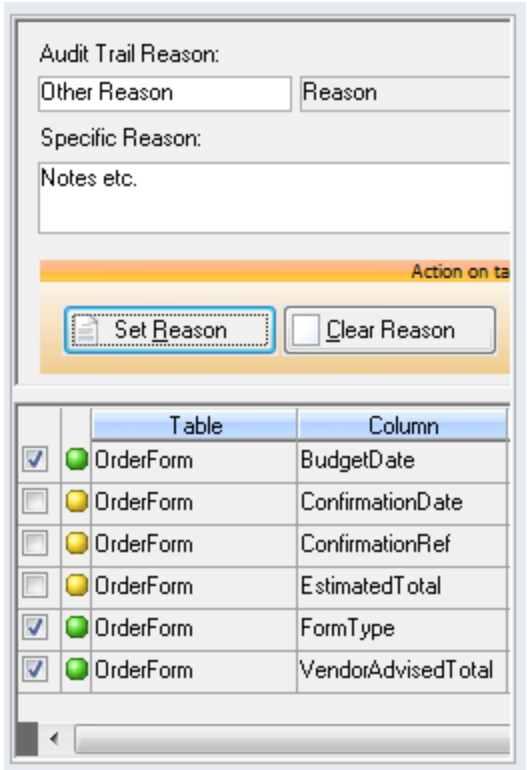
Fields where a reason is mandatory are marked with a red ball.

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.

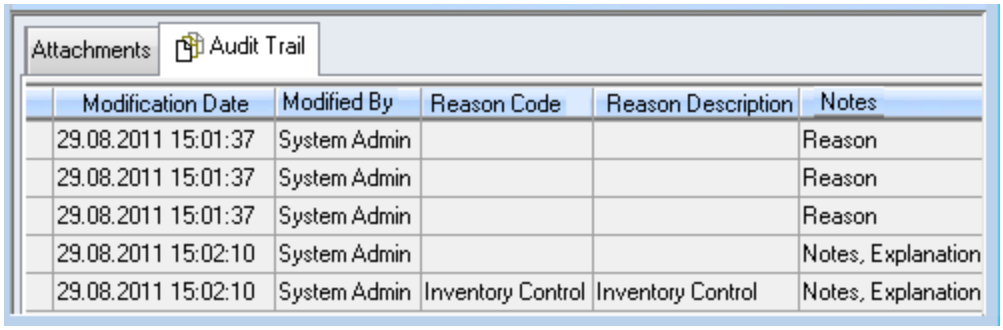
If no reason codes are available/applicable, enter a free-text explanation.

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:

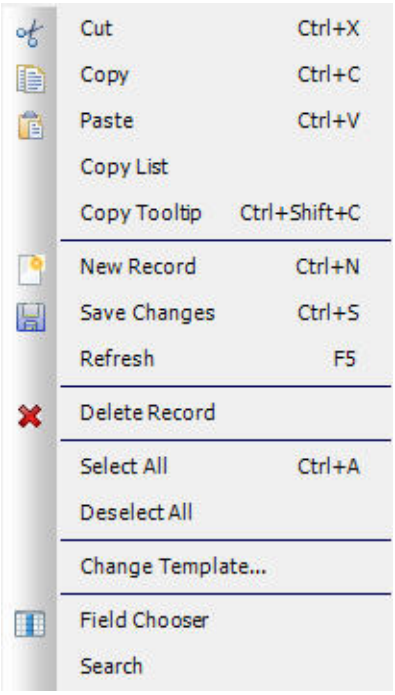


Figure 13 Edit Menu

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.

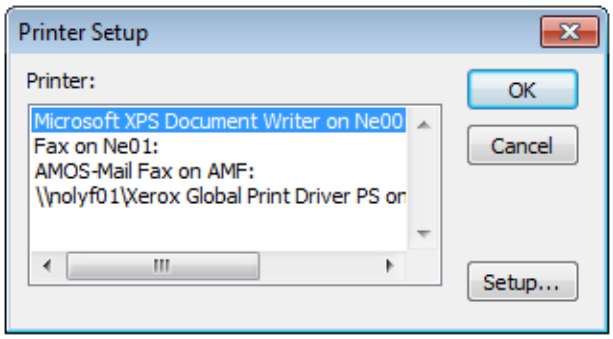


Figure 14 The Printer Set-up Window

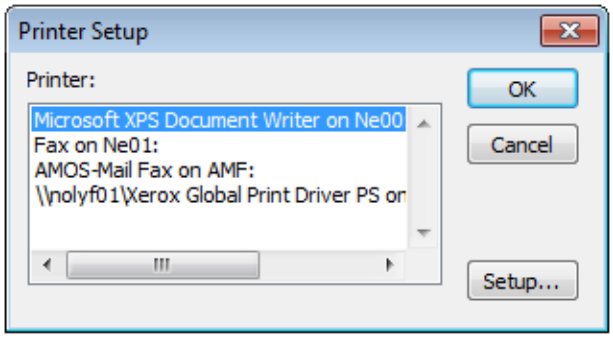
Click the **Setup** button to enter the Properties dialog box for the selected printer. The options available in this box depend on the printer and printer driver selected.

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 Quality & Safety

AMOS Quality and Safety is a comprehensive tool for compliance, quality, assessment, risk management, and document control. Using Q&S you design the system to suit your needs, both in regards to textual information and data acquisition. This flexibility however means that you are responsible to ensure that the system is accurate and complete.

3.1 Procedures

Procedures describe which measures to take at your various sites to maintain the established quality goals of your organisation.

The Procedures window[1] is for creating and maintaining your organisation's procedures and documents. Each procedure is an entry in the window and can be revised as needed. After you create the procedure record you add things to it:

- documents (and document templates) containing procedure details;
- job descriptions and schedules for the related work to be done;
- links to relevant manuals and conventions;
- references to other related procedures;
- attachments.

AMOS makes it easier to ensure that all the sites in your organisation follow the correct procedure: once you have a procedure complete and ready to go, distribute it to the installations at which it applies.

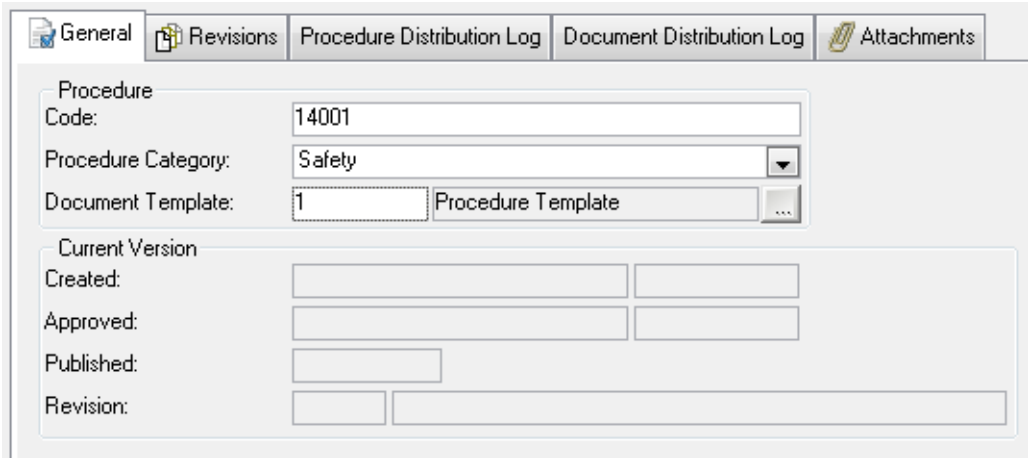
NOTE: A set of sample procedures may be installed with the application. You can use these as a starting point for creating your own tailor-made procedures. Correct access is required to create brand new procedures.

3.1.1 Creating A New Procedure

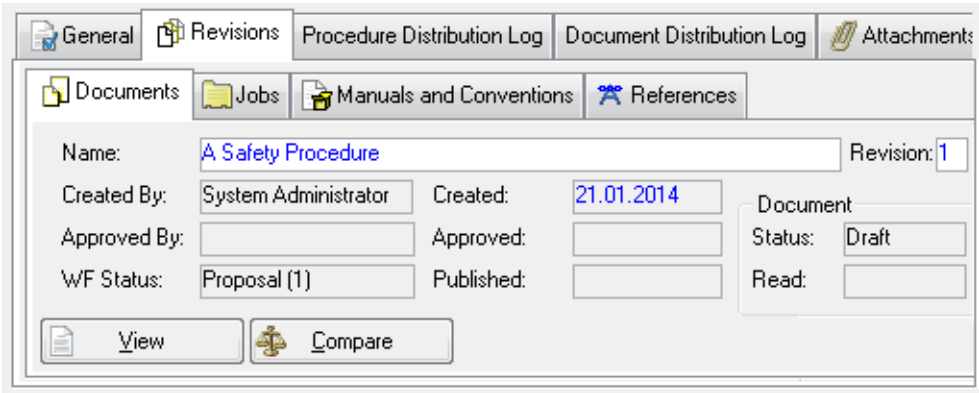
To create a new procedure record:

[1]The Procedures window that you see will depend on your combination of access rights.

1. Go to **Quality > Procedures**. Click **New** on the window toolbar.
2. Enter a **Code**, **Procedure Category** and a **Document Template**:



3. Open the Revisions tab. Enter a **Name** in the Documents sub-tab:



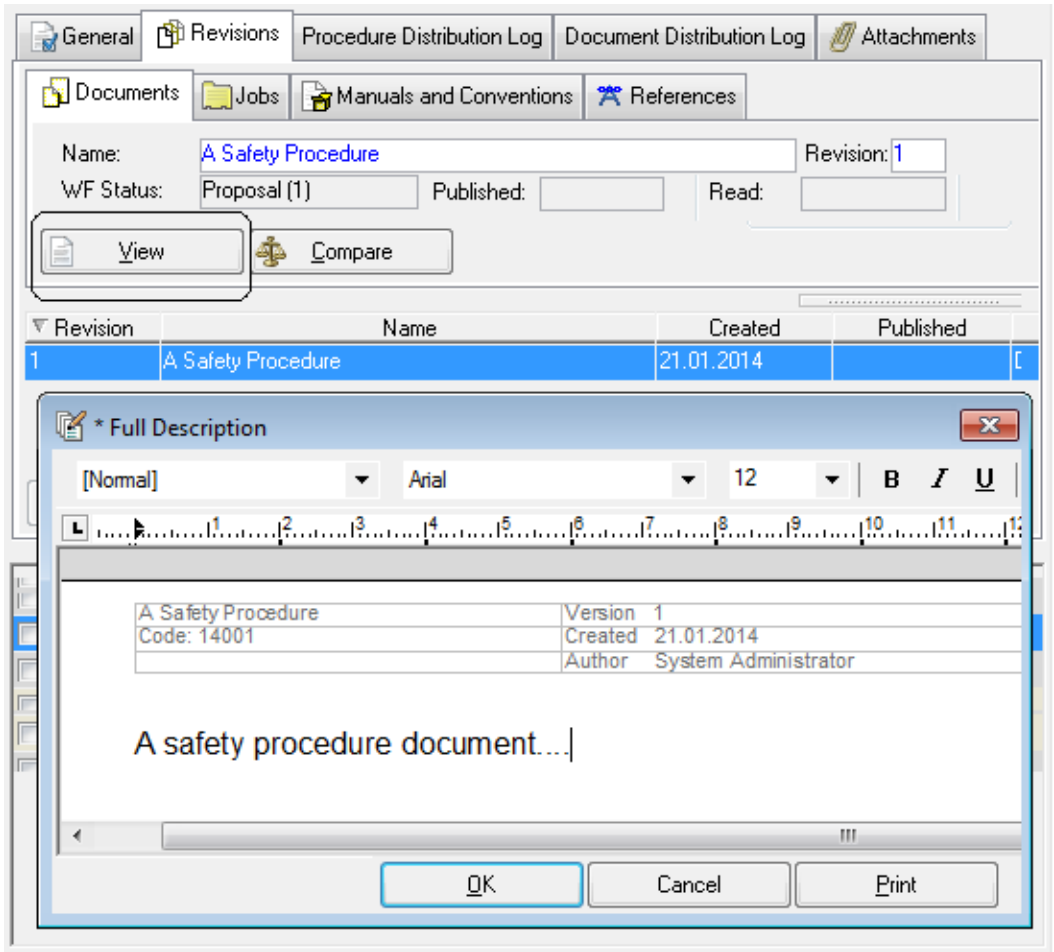
4. **Save** the window and the revision details on the General tab will be updated for you.

The window at **Options > Quality Log** will eventually display information about the selected procedure.

3.1.2 Attaching A Document To A Procedure

Once you have a procedure record in the window, attach a procedure document to it:

1. Select a procedure and open the Revisions tab. Select the current draft.
2. Click the **View** button or go to **Options > Details**. This opens a Full Description window, containing the blank document template as assigned on the Procedure window General tab:



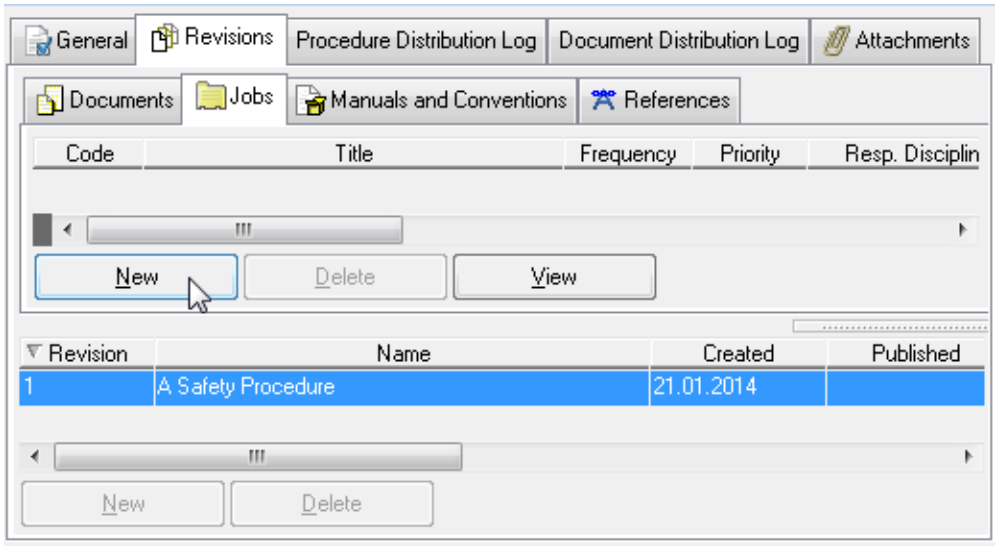
3. Enter or copy and paste text here. Click **OK** to close the document and return to the Procedures window.
4. **Save** the changes. Clicking **View** again will show you the document with containing the text.

Keep track of which users have opened and read the active version of a document in the window at **Options > Document Read Log**. A new entry is created in the DocReadLog when a user opens an active version of a document they have not previously read.

3.1.3 Adding Jobs To A Procedure

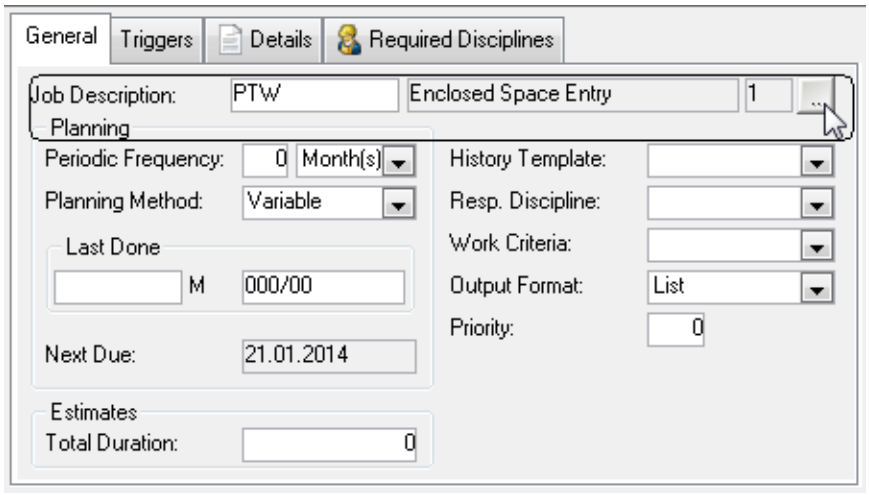
You can connect one or more related jobs to a procedure. Work orders will eventually be generated for each job.

1. Select an unpublished procedure revision and open the Jobs sub-tab.
2. Click **New** in the tab:



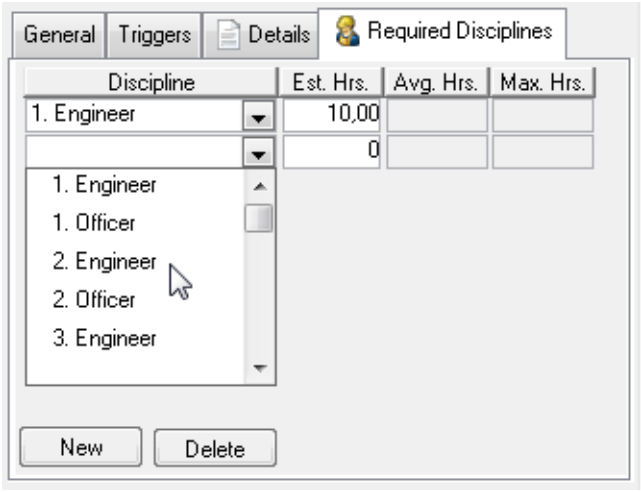
This opens the Procedure Jobs window.

3. Select a **Job Description**:



The job description itself will appear in the Details tab.

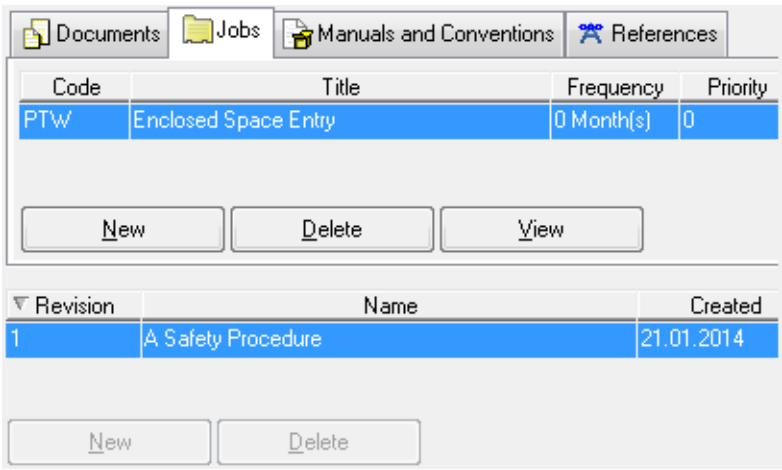
4. Create a job schedule in the Planning section and/or Triggers tab. See section 3.1.3.1 for information about how to schedule jobs.
5. Specify the employee (by discipline) in charge in the **Responsible Discipline** field. Add more team members by discipline in the Required Disciplines tab:



6. Select a **History Template** for use with work reporting, and the **Output Format** AMOS should use to print when work orders are generated:

- **List**. A single line for the job.
- **Compact List**. Only the most important information for the job.
- **Work Order**. Also includes the complete description for the job.

7. **Save** the job. Click **New** to add another to the same procedure, or close the window to return to the Procedures window where the newly added job(s) appears:



3.1.3.1 Scheduling Jobs

A job can be initiated in either of two ways:

- by a *periodic schedule*. Periodic jobs are based on a calendar schedule and will be performed repeatedly throughout the lifetime of an installation. See section 3.1.3.1.1.
- *triggered* by an event. Event-based jobs are only performed as the result of an event, like 'Arrival' or 'Departure'. See section 3.1.3.1.2.

Work orders will eventually be created for the jobs according to schedule or trigger. See section 3.5 about generating and carrying out work orders.

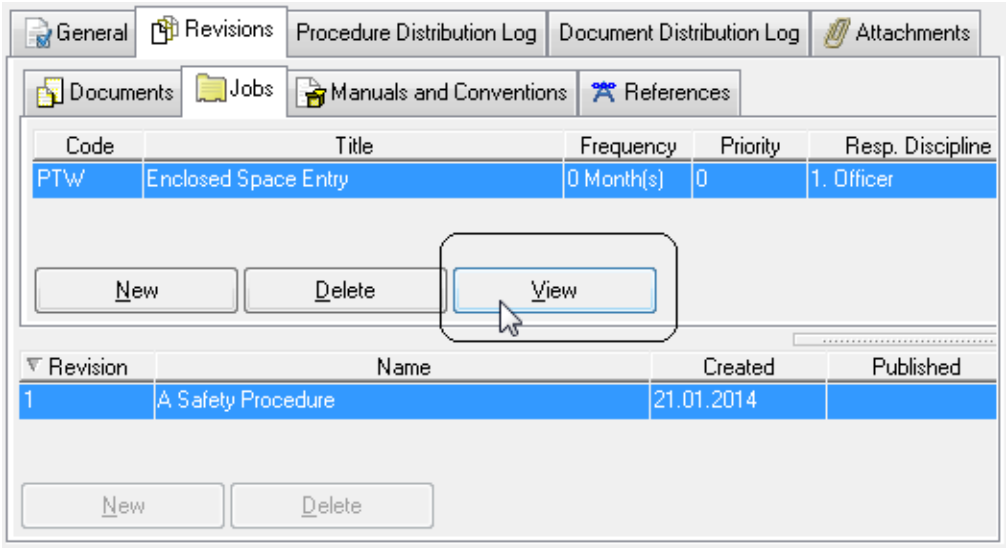
3.1.3.1.1 Periodic Frequencies and Planning Methods

You can schedule jobs to be carried out regularly at a defined periodic frequency. Work orders for jobs with a periodic frequency can be handled automatically after the system has been

`kick-started' by generating the first work order: once the status of the current work order has been set to Completed, AMOS generates the next one.

To create a periodic schedule:

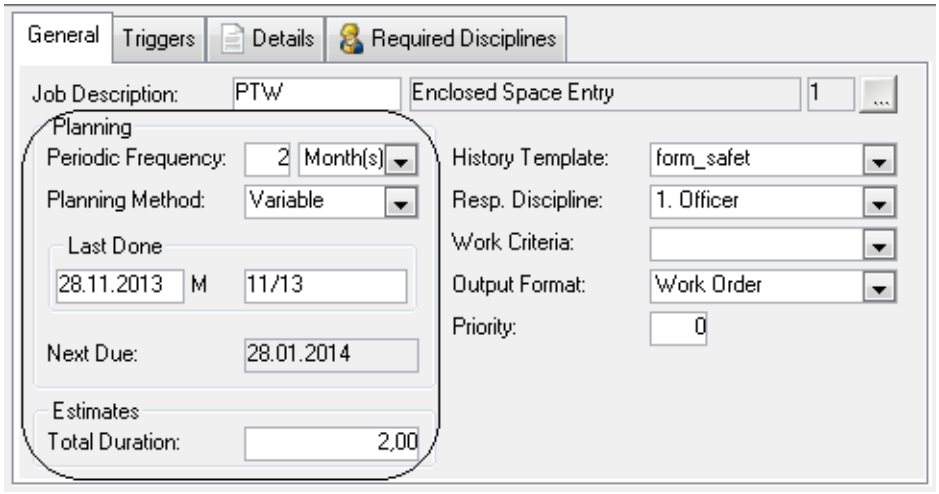
1. Select a procedure and open the Revisions tab. Choose an unpublished revision and open the Jobs sub-tab.
2. Click **New** or **View** to access the Procedure Jobs window:



   Either create a new job or select an existing one in the Procedure Jobs window.
3. Set the interval at which this job should be carried out - for example, 2 months - in the **Periodic Frequency** field.
4. Set a **Planning Method**. After the first work order for this job has been completed, AMOS will generate the next one due, and so on, according to the planning method:

- **Variable Planning** enables a flexible reporting date. For example, if the job is to be reported every 30 days, the next due date is calculated according to the date of the last report. So, reported on 5 May causes the next due date to be set to 5 June.
- **Fixed Planning** means a report is always due on the same day of each month. This means that no matter when the job is reported, the next due date remains fixed even if the report was late and fewer than 30 days remain until the next set date.

5. Set the **Last Done** date. AMOS will project the **Next Due** date according to the scheduling information you have provided.
6. Enter an estimated **Total Duration**.



7. **Save** your work. Close the window to return to the Procedures window.

See section 3.5.1 to read about generating periodic work orders.

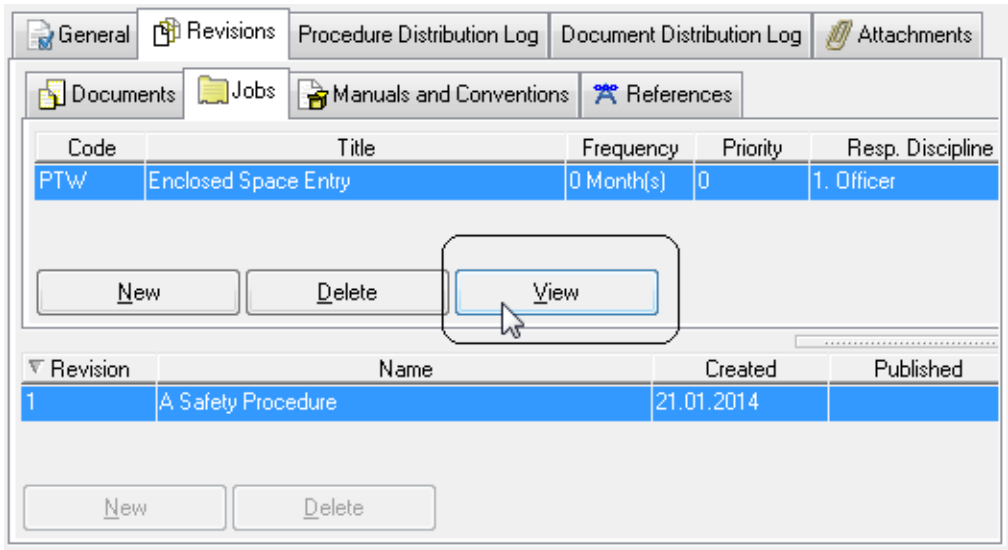
3.1.3.1.2 Triggers

Triggers[1] are another way of determining when jobs should be carried out. For example, 'Weekly' may be defined as a trigger for tasks to be carried out every week. Triggers can also be used to schedule jobs which are handled when a specific event occurs. For example, 'Arrival' may be a trigger for jobs to be carried out when a vessel arrives in port.

Before you can 'trigger' jobs and so generate the necessary work orders, you need to link the relevant triggers to the jobs they activate.

To link a trigger to a job:

1. Select a procedure and open the Revisions tab. Choose an unpublished revision and open the Jobs sub-tab.
2. Click **New** or **View** to access the Procedure Jobs window:

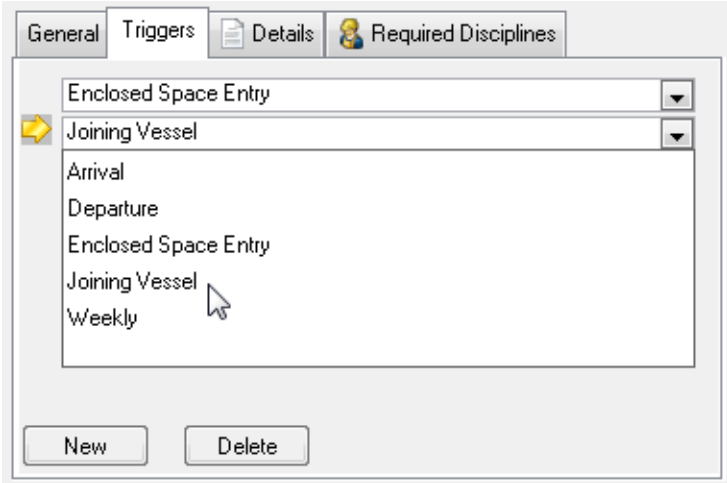


Either create a new job or select an existing one in the Procedure Jobs window.

3. Open the Triggers tab and click **New** inside the tab.

[1]Triggers are defined in the register at File > Open Register > General > Job Triggers.

4. Select a trigger:



   Add more if needed.

5. **Save** the changes. Close the window to return to the Procedures window.

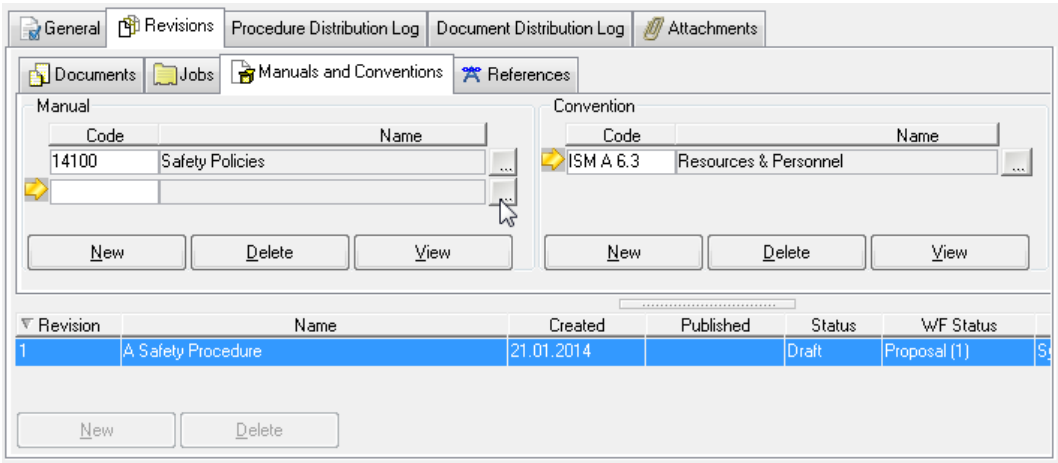
Jobs with triggers attached are eventually activated by selecting **Quality > Trigger Jobs**. AMOS then generates Work Orders for jobs which do not already have a current work order.

See to read about triggering work orders.

3.1.4 Adding Manuals And Conventions To A Procedure

You can attach existing manuals and conventions to a draft procedure:

1. Select a procedure and open the Revisions tab.
2. Select an unpublished revision and open the Manuals and Conventions tab.
3. Click **New** in the Manual/Convention list and then use the lookup to select one:



4. Add as many as are relevant to the selected procedure.
5. **Save** the changes.

> **TIP**
>
> Clicking the **View** buttons opens the Manuals/Conventions window directly and you can read the relevant documentation there.

Create new manuals and conventions in the windows at **Quality > Manuals/Conventions**. See Chapter 8 and Chapter 9 for more information.

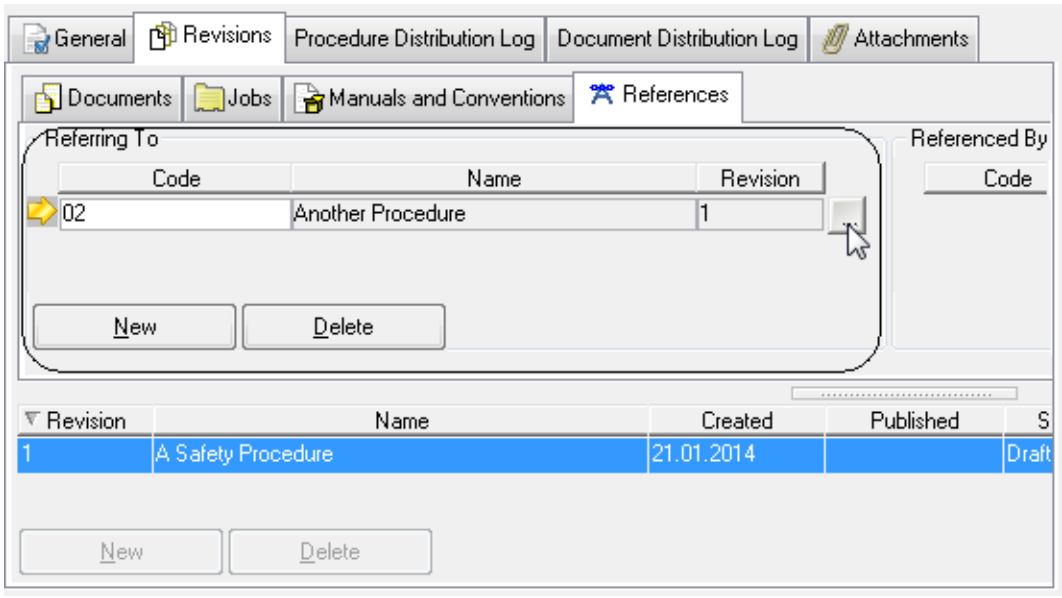
3.1.5 Referring Procedures To Other Procedures

The Procedures window Revisions tab > References sub-tab is for referring procedure documents to each other. The tab contains two lists: procedures the selected procedure revision refers to; and other procedures which reference the currently selected one.

> **EXAMPLE**
>
> The procedure 'A Safety Procedure' refers to the procedure 'Another Procedure'. You want to add this reference to the window.

To add this reference:

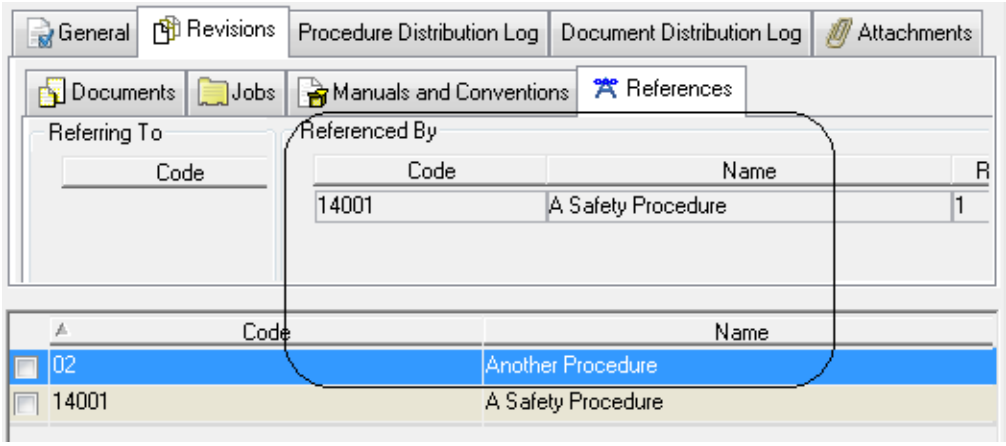
1. Select 'A Safety Procedure' in the Procedures window list and open the Revisions tab. Select an unpublished revision and open the References tab.
2. Click **New** on the left side of the tab and lookup 'Another Procedure':



NOTE: Only published[1] procedures are available for selection.

3. **Save** the reference. Select 'Another Procedure' in the bottom of the Procedures window list. Open the References sub-tab:

[1]The status depends on your own work flow configurations: for example active or issued are also possible statuses.



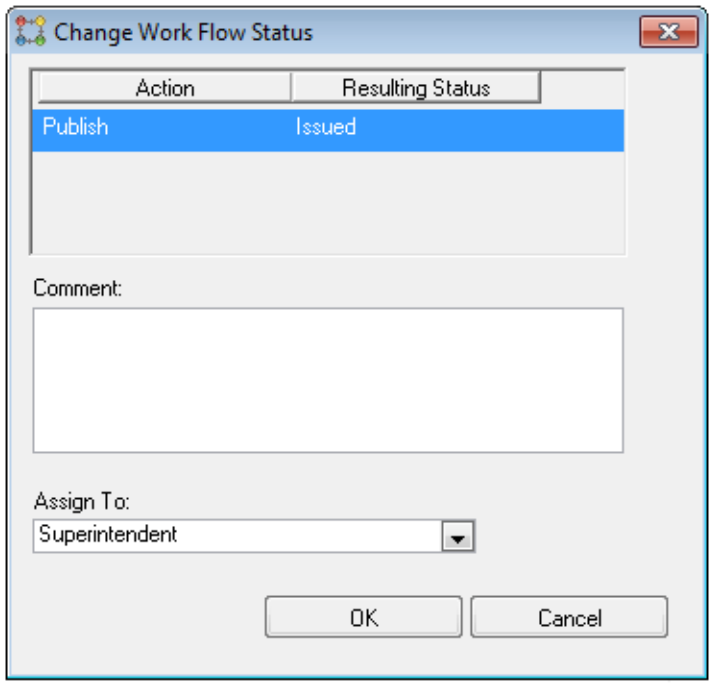
'A Safety Procedure' appears read-only on the right side of the window in the Referenced By list.

3.1.6 Publishing A Procedure Revision

Before procedures can go into use and work orders can be generated for jobs, the latest procedure version needs to be published, or issued[1].

1. Select a procedure with an unpublished revision.
2. Go to **Options > Work Flow...**. Work flow actions and resulting statuses depend on your organisation's work flow. You may have to process a series of drafts, or approve the procedure first.

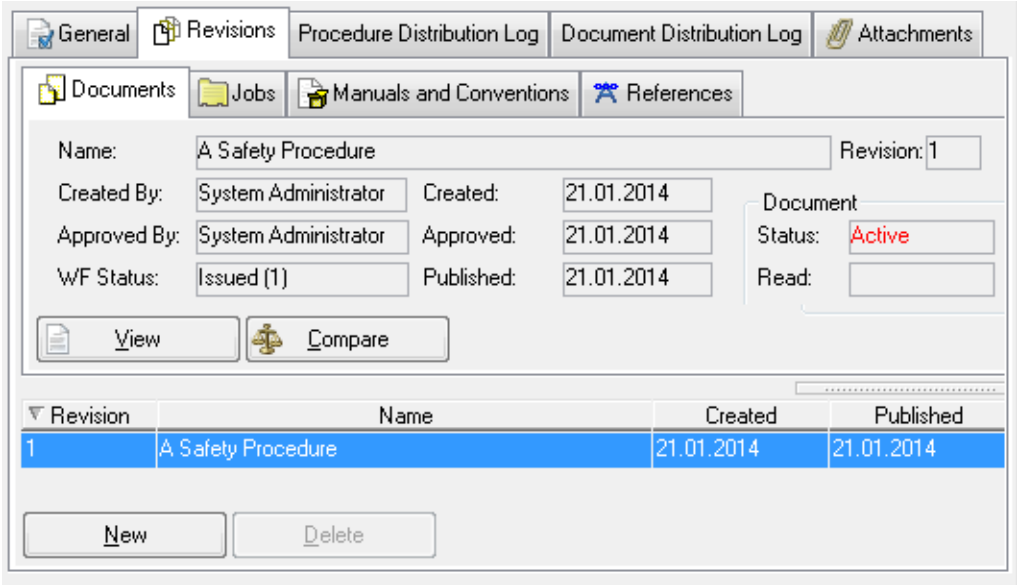
   Select the publishing action:



3. Click **OK** to publish the procedure revision and return to the Procedures window, where

[1]Available work flow actions and statuses depend on your own work flow configurations. Those listed here are examples using the pre-configured work flow and so may differ from your own.

you can see the changes in the Revisions tab:



You can keep track of a procedure's work flow progress in the window at **Options > Activity Log**.

3.1.7 Distributing Procedures

Your organisation may have a large number of procedures. Some procedures may apply to all installations while others are specific to a single installation or an installation group.

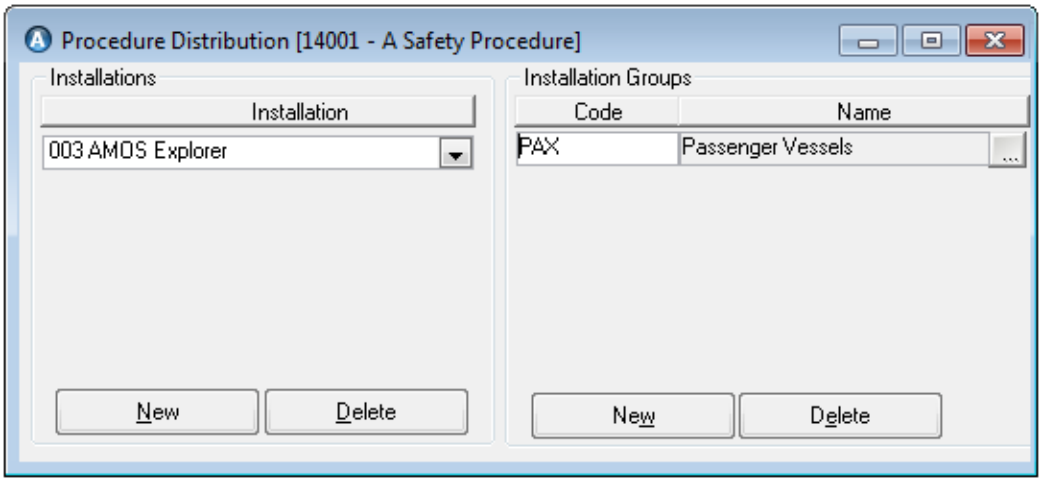
There are two ways to approach document distribution:

- Distribute a single document at a time to one or more installations, directly from the Procedures window. See section 3.1.7.1.
- Organise distribution for a large number of procedures all at once by installation or by installation group. See section 3.1.7.2 for installations and section 3.1.7.3 for installation groups.

3.1.7.1 Distribution From The Procedures Window

To distribute procedures one-by-one in the Procedures window:

1. Open the Procedures window and select a procedure in the list.
2. Go to **Options > Distribution.....** This opens the Procedure Distribution window.
3. Click **New** and lookup installations on the left and installation groups on the right:



The procedure will be distributed to any you list.

4. **Save** and close the window to return to the Procedures window.

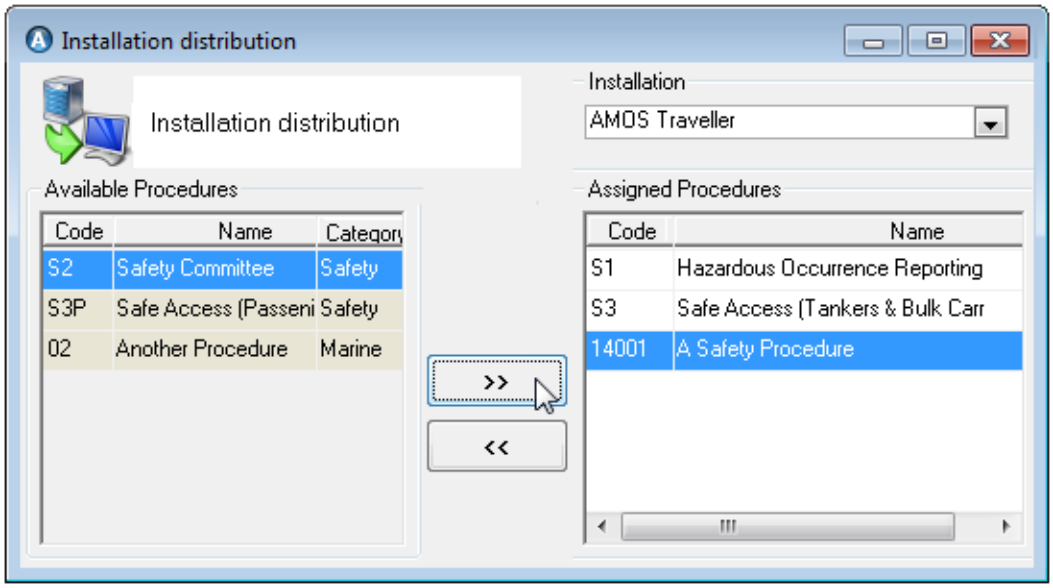
3.1.7.2 Distribution By Installation

The Distribution windows contain all the current procedures in your system and you can allocate them to the installations where they are needed.

To distribute procedures to one or more individual installations:

1. Go to **Quality > Distribution > Installation**.

   All available procedures are listed on the left side of the screen. Select any **Installation** on the right side to see which procedures are currently distributed there:



2. Select a procedure in the **Available** list. Click the right-arrow to move it to the **Assigned** list.
3. **Save** the changes. Remove a procedure by selecting it in the **Assigned** list and clicking the left-arrow.

3.1.7.3 Adding A Procedure To An Installation Group

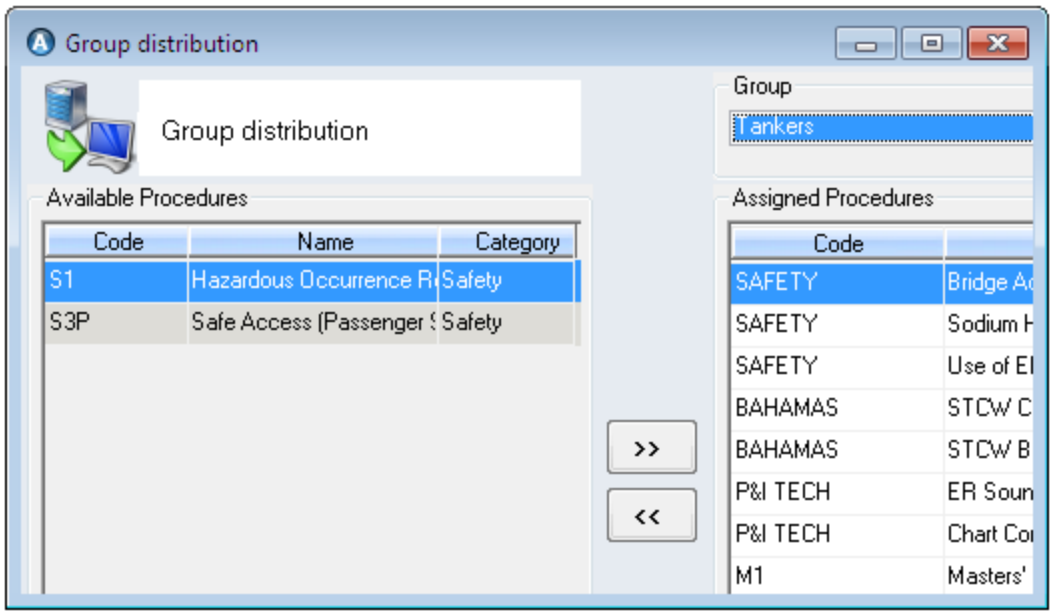
The Distribution windows contain all the current procedures in your system and you can allocate them to the installation groups where they are needed.

An installation group consists of several sites, and each site may belong to one or more installation groups[1].

To distribute procedures to one or more installation groups:

1. Go to **Quality > Distribution > Installation Group**.

   All available procedures are listed on the left side of the screen. Select any Installation **Group** on the right side to see which procedures are currently distributed there:



2. Select a procedure in the **Available** list. Click the right-arrow to move it to the **Assigned** list.
3. **Save** the changes. Remove a procedure by selecting it in the **Assigned** list and clicking the left-arrow.

Remove a procedure by selecting it in the **Assigned Procedures** column and clicking the left-arrow.

3.1.7.4 Distribution Logs

There are two types of Distribution Logs available in the Procedures window:

- **Procedure Distribution Log** - lists all the procedures imported to the installation.
- **Document Distribution Log** -lists all the documents imported to the installation.

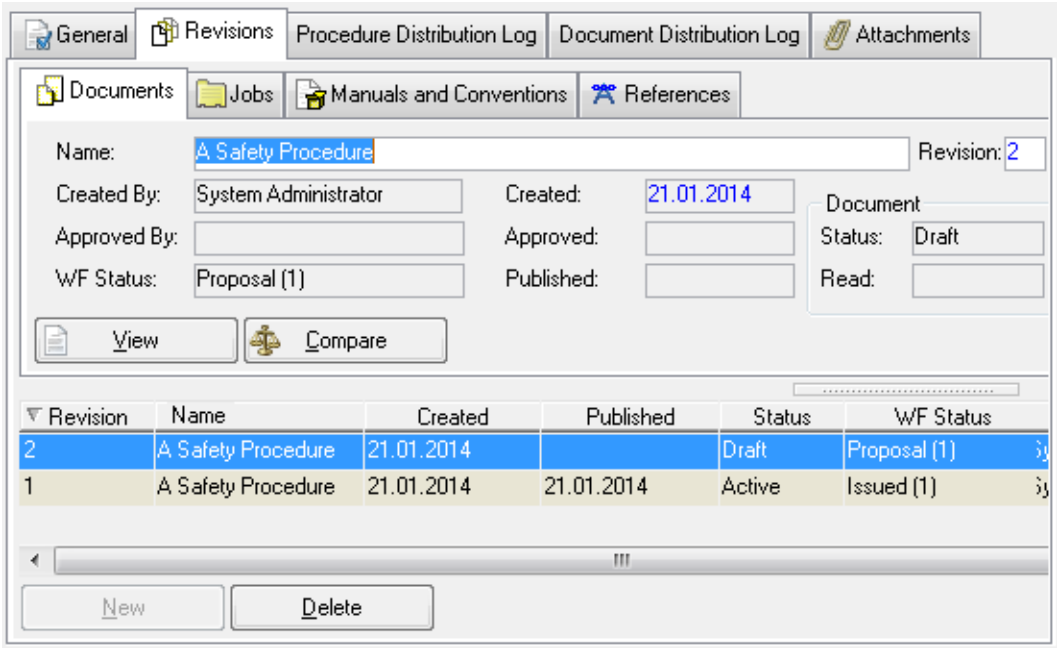
3.1.8 Creating A New Procedure Revision

Available work flow actions and statuses depend on your own work flow configurations. Those listed here are examples using the pre-configured work flow and so may differ from your own.

As processes and jobs change, update your procedures by creating new revisions:

[1]Installation Groups are defined at Tools > Configuration > Installations > Installation Groups.

1. Open the Procedures window and select a procedure in the list.
2. Open the Revisions tab. Click **New** in the Documents sub-tab[1]:



3. This creates a new draft revision. Alter the revision as needed:

- Click **View** to open and edit the procedure document.
- Job triggers, schedules and required disciplines will be copied from the previous revision. Add, remove or edit the linked jobs as needed.
- Manuals and conventions will be copied from the previous revision. Add or remove manuals and conventions as needed.
- 'Referring To' procedures are copied from the previous revision and you can add or remove procedures from this list. Any 'Referenced By' procedures are not copied from revision to revision.

4. **Save** the revision. When the new revision is ready, publish it using the work flow. See section 3.1.6 for more about publishing procedures.

NOTE: Only one draft and one active revision of the same procedure can exist at a time. Publishing a new draft renders the previous active revision obsolete. You can have multiple obsolete versions.

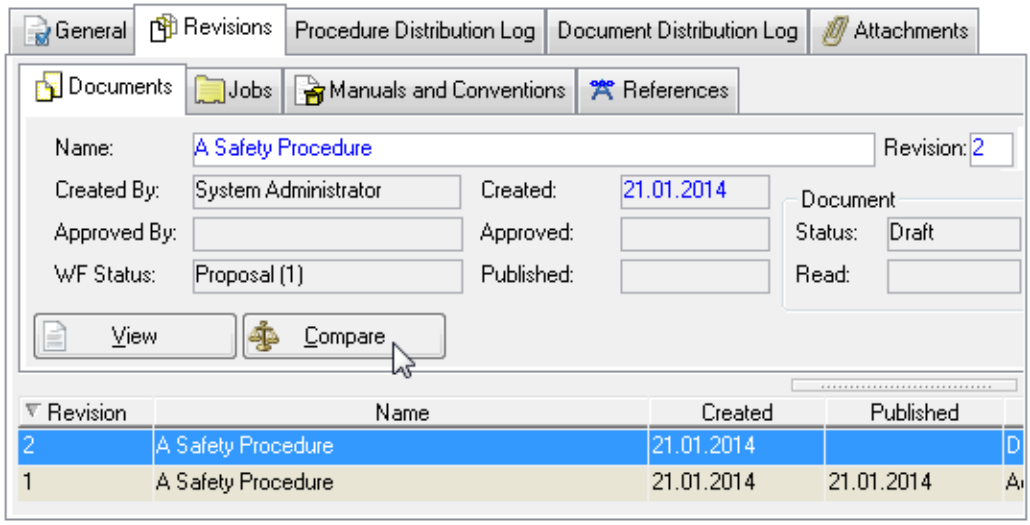
Keep track of who has read the selected procedure version in the window at **Options > Procedure Read Log**. When a procedure has a new version assigned to a particular user to read, a new entry is created in the ProcedureReadLog file when that user opens the new version. Procedures with unread versions will be highlighted in red.

3.1.8.1 Comparing Documents

To compare different revisions of a document:

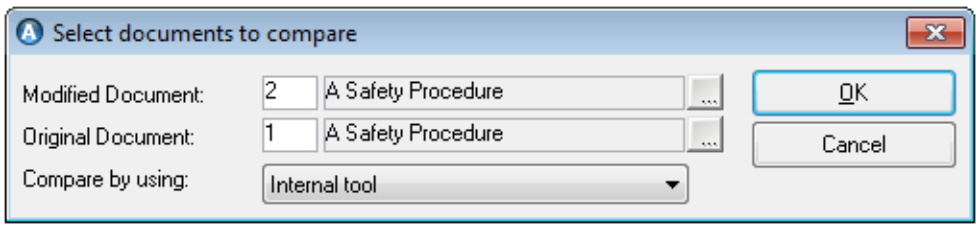
1. Open the Procedures window and select a procedure in the list.
2. Open the Revisions tab. Click **Compare**:

[1] If a 'draft' revision exists already, the button will not be available.



The select documents dialog opens.

3. Select a **Modified** and an **Original** document:



Choose to use either the **Internal Tool** or **Word** for viewing and comparing.

4. Click **OK**. The Compare Documents window opens.
5. Click **Cancel** or close the window to return to the Procedures window.

3.1.9 Procedures Window - Read Only

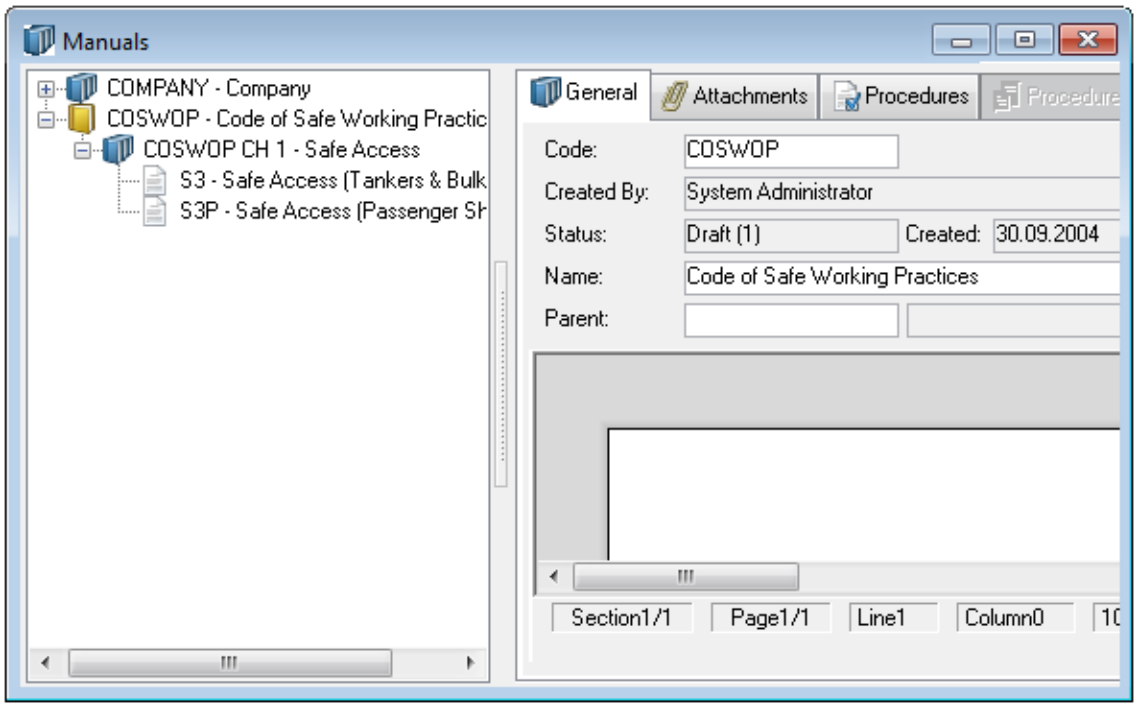
Some users open the Procedures window to read documents, but not to edit or create new documents. The read-only Procedures window is simplified and intended for those users who just need to view and print Procedure Documents. This Procedure window only appears if the user has the following combination of access rights in Access Control:

- No access to Procedures on the Registers tab
- Access to Procedure Documents on the Functions tab
- No access to Complete System on the combined tab

No changes can be made in this window.

3.2 Manuals

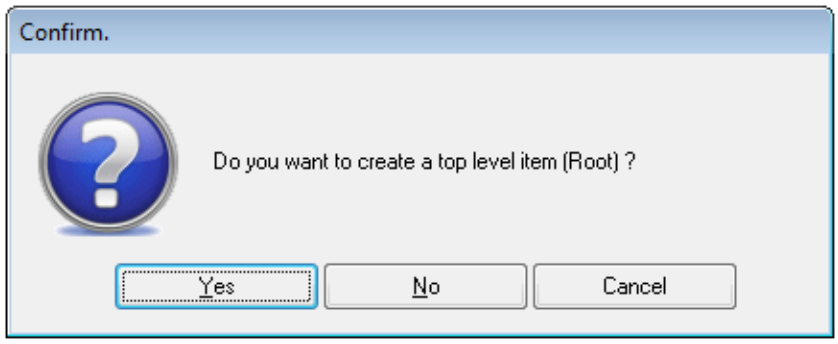
Use the Manuals window to add manuals to your database for viewing by everybody or by selected groups. Manuals are stored in a hierarchy structure - manuals contain sub-folders or chapters, and chapters contain procedures and procedure documents:



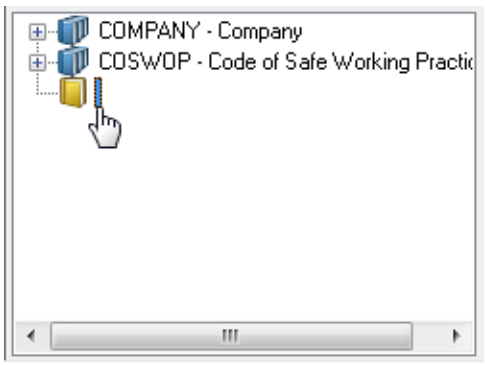
Each manual shown on the left side of the window can be controlled, approved and published. Once a manual is established here, you can link it to any relevant procedures in the Procedures window. See section 3.1.4.

To add a new manual:

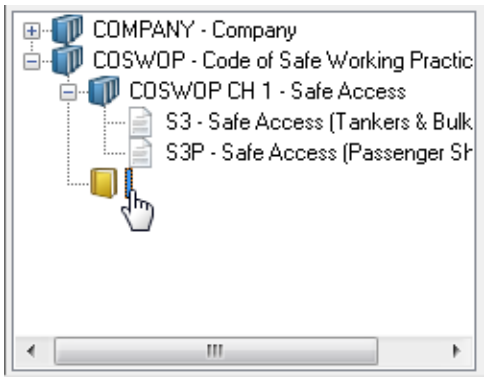
1. Go to **Quality > Manuals**. Click **New**.
2. AMOS asks if you want to add a top-level item:



- Click Yes to add a new manual:



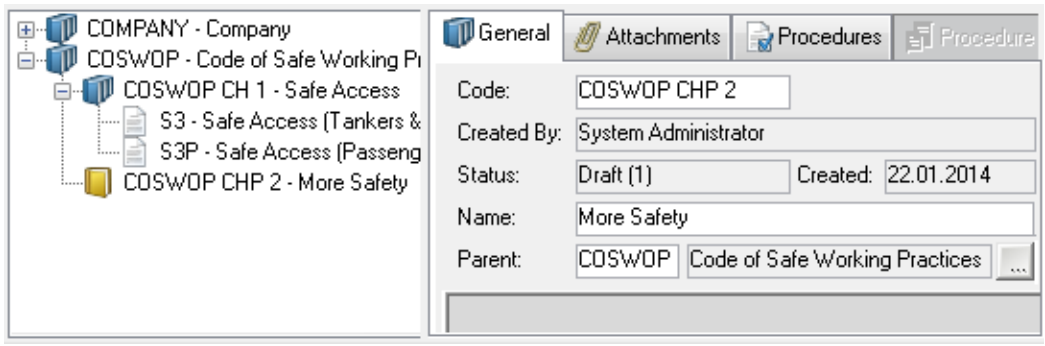
- Or click **No** to add a sub-folder or chapter:



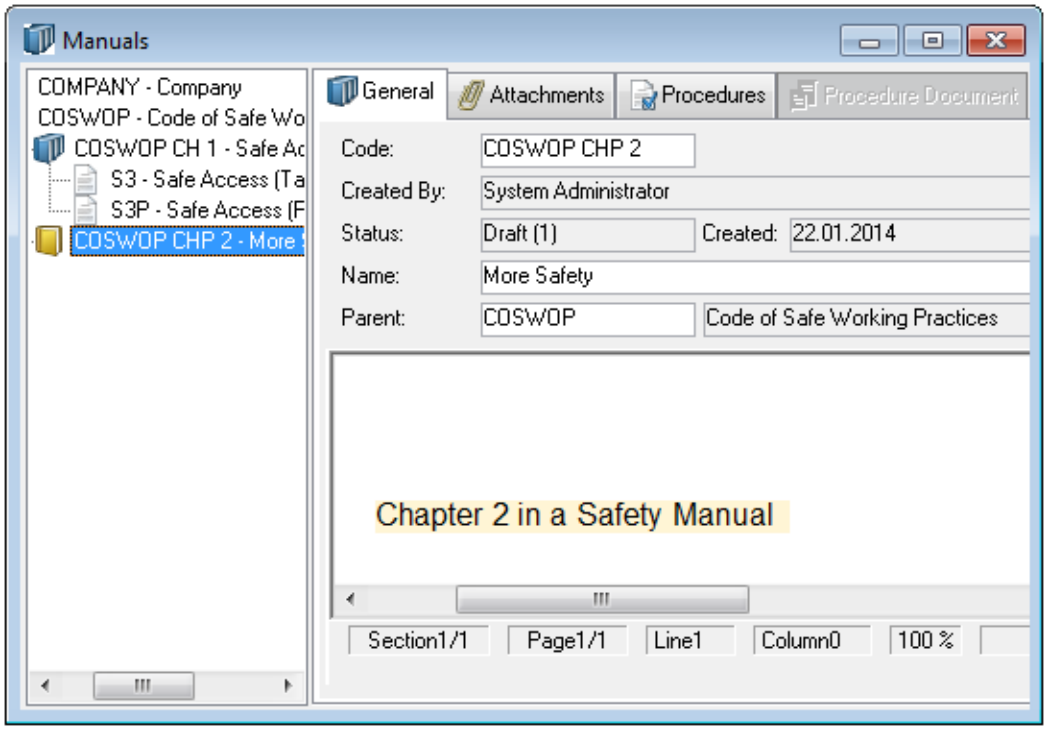
TIP

You can drag and drop chapters into different locations within the hierarchy.

3. Enter a **Code** and **Name** on the General tab. For a chapter or other sub-section, lookup the **Parent** manual:



4. To add content to a manual or chapter, go to **Options > Details**. Type, or copy and paste content into the Full Description window.
5. Click **OK** to return to the Manuals window where your content will now appear in the General tab page:



6. **Save** your work.

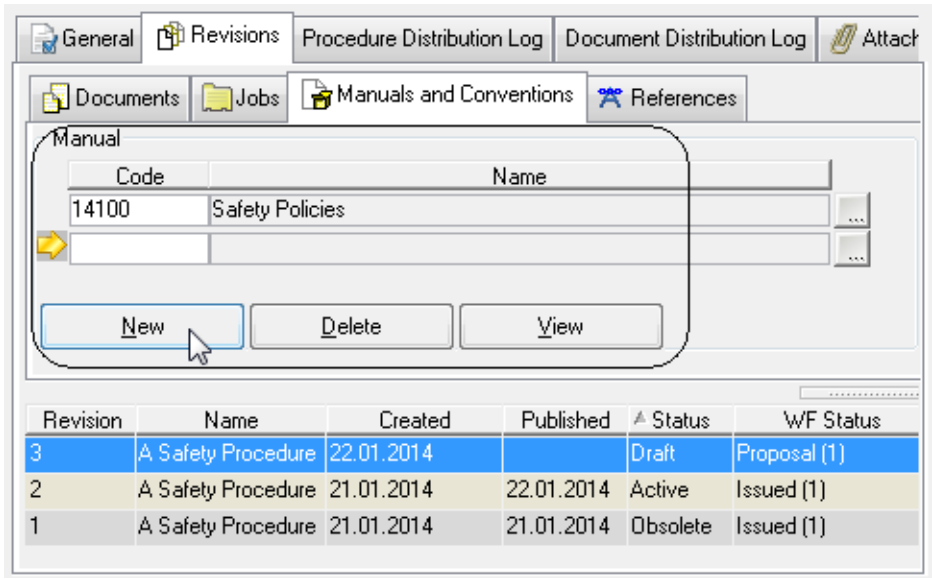
> **TIP**
> To search for a word or phrase in a document, go to **Options > FInd** and enter some text. The search covers all saved manuals and returns a count of the number of manuals found containing the search criteria.

3.2.1 Manuals - Assigning Procedures And Documents

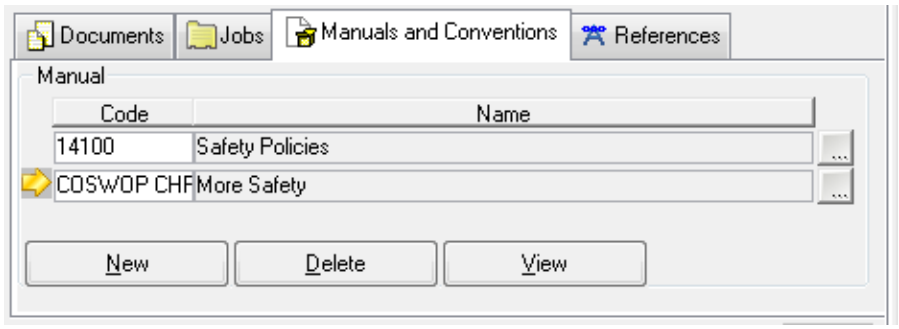
Once you have created a manual you can associate it with any relevant, published procedures. When a manual or a chapter of a manual is linked to a procedure, the procedure shows up in the Procedures tab on the Manuals window. The active revision of the document itself will appear in the Procedure Document tab.

To link a manual or chapter to a procedure:

1. Go to **Quality > Procedures**. Select a procedure in the window.
2. Open the Revisions tab. Select a draft revision: it is not possible to assign manuals to procedure revisions which are obsolete or have already been activated.
3. Open the Manuals and Conventions tab. Click **New** under Manual:



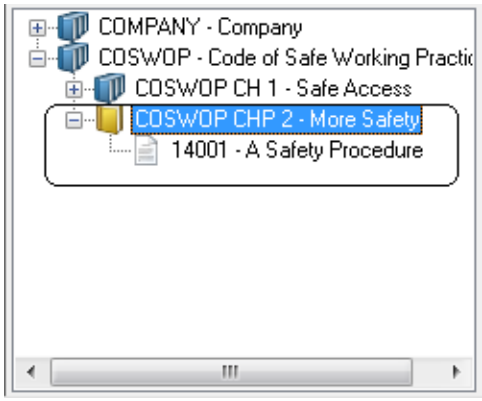
4. Use the lookup to select a manual or chapter:



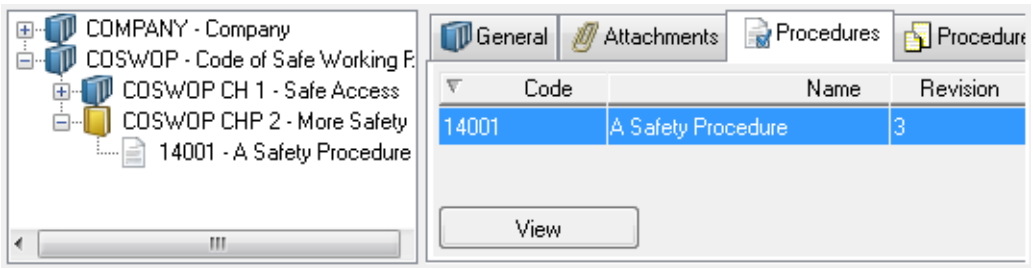
5. **Save**the window. Before this link can be established, the draft procedure revision needs to be published according to your work flow configuration. See section 3.1.6 about publishing procedure revisions.
6. Once the procedure is finalised and published, **Save** and exit the Procedures window.

To See the Procedure in the Manuals Window

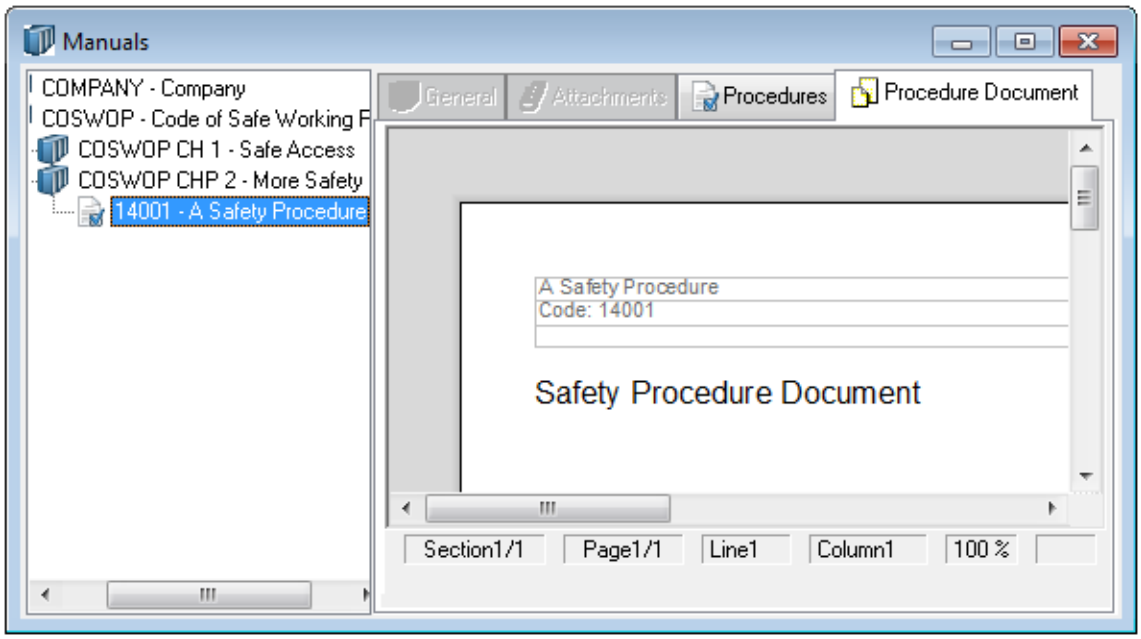
Go to **Quality > Manuals**. Select the same manual/chapter in the hierarchy. You can see that the associated procedure now appears in the hierarchy:



It is also listed with its current active revision number in the Procedures tab:



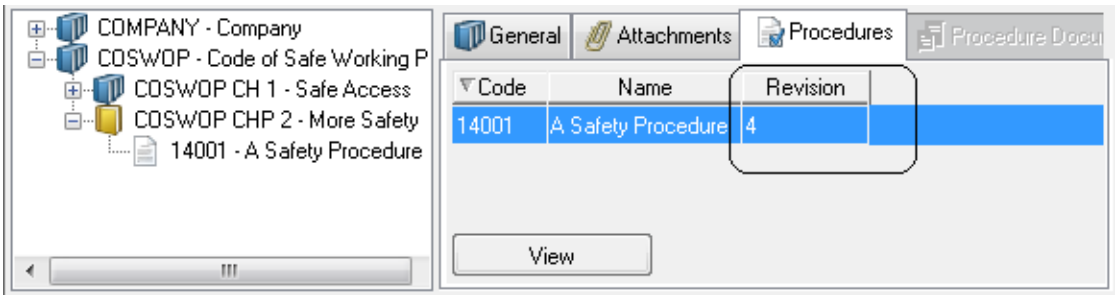
Clicking the **View** button opens the Procedures window. Select the procedure in the hierarchy and open the Procedure Document tab to see the linked procedure document revision there:



What Happens When a New Document Revision is Published?

If you later on create and publish a new draft of this procedure document, the same links to manuals will be copied to the new revision. This means that the manual or chapter in question will be updated to show the new revision number and reflect any changes.

In the illustration below, the procedure 'A Safety Procedure' was added in Revision 3. Later, Revision 4 was created and published, and so updated here:

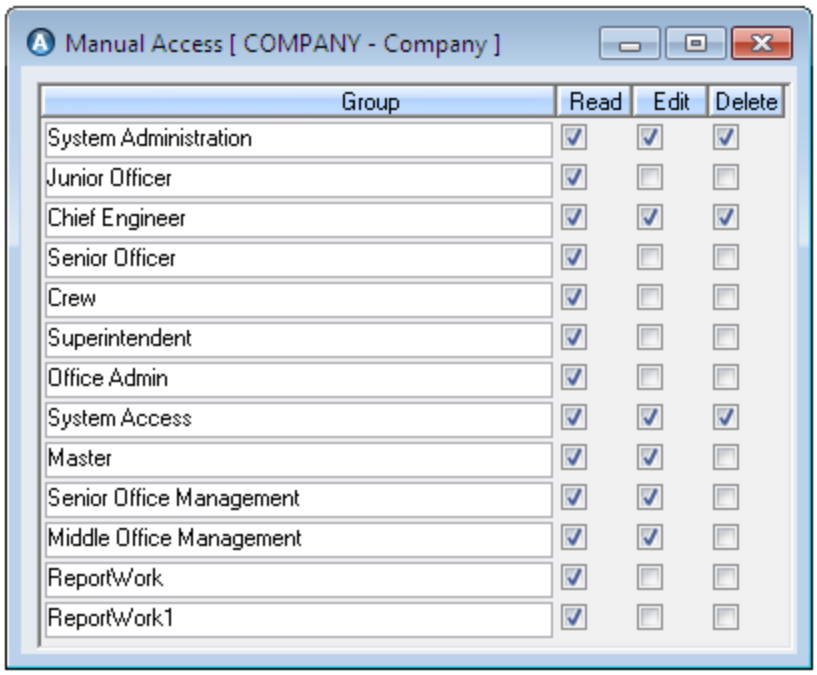


3.2.2 Manual Access

You assign access rights to crew members to Read, Edit and Delete manuals. When rights are assigned to one person, everyone else is locked out unless given specific read, edit or delete rights. If no access rights are established then access to the manual is available to all users.

To view or assign access rights to a manual:

1. Select a manual or a chapter.
2. Go to **Options > Manual Access**:

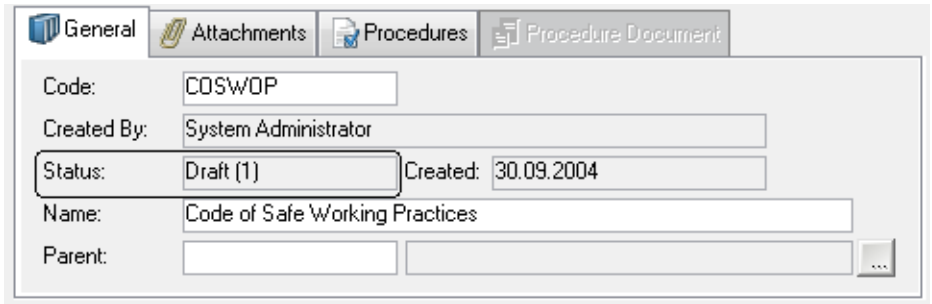


3. Flag **Read**, **Edit** or **Delete** rights to the manual for any/all groups.
4. **Save** and close the window to return to the Manuals window.

3.2.3 Issuing A Manual

When a manual is complete, you can issue it using the work flow[1].

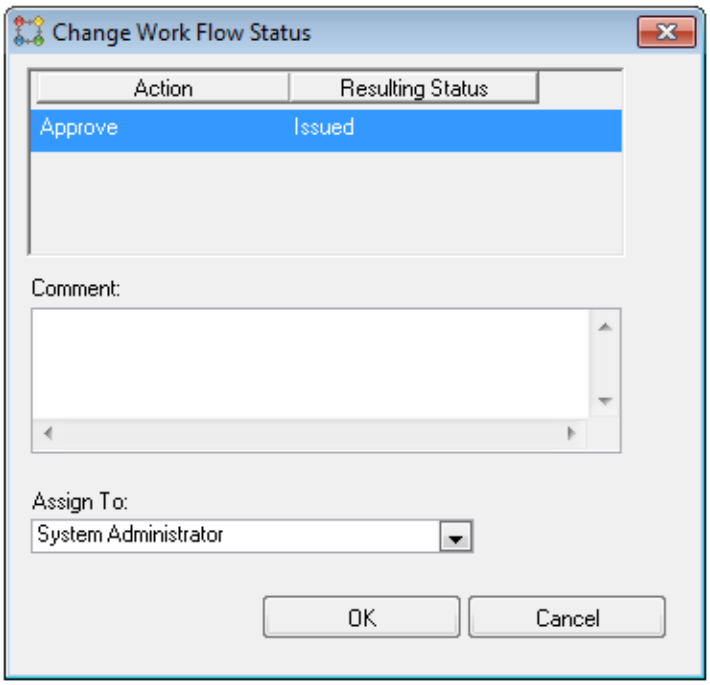
1. Select a manual or a chapter with the **Status** set to 'Draft':



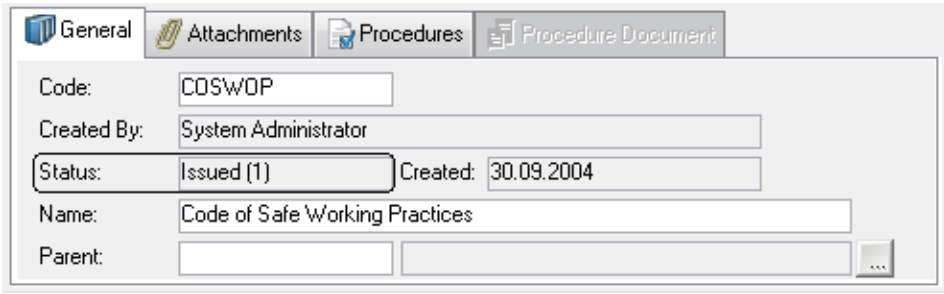
2. Go to **Options > Work Flow...**. Work flow actions and resulting statuses depend on your work flow: you may have to process a series of drafts, or approve the manual/chapter first.

   Select the issuing action:

[1]Available work flow actions and statuses depend on your own work flow configurations. Those listed here are examples using the pre-configured work flow and so may differ from your own.

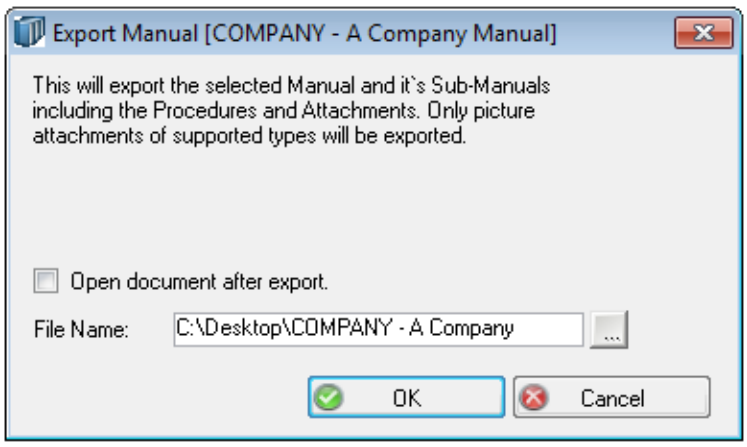


3. Click **OK** to issue the manual/chapter and return to the Manuals window, where you can see the changed status:



Keep track of a manual's work flow progress at **Options > Activity Log**.

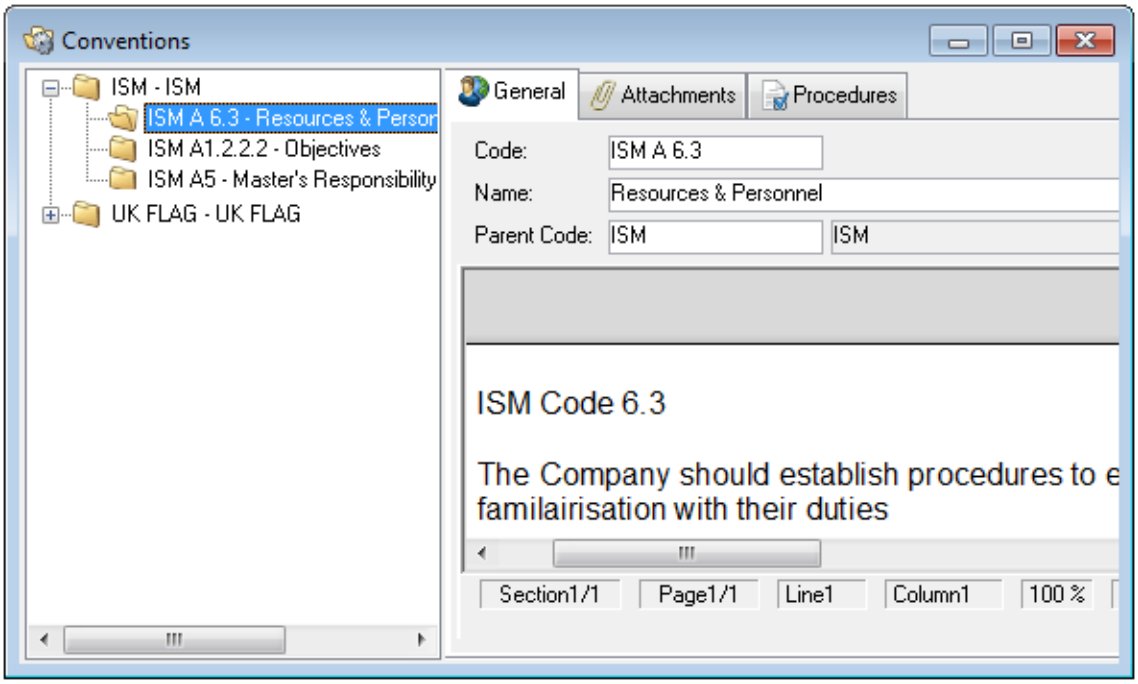
To generate a copy of a manual for external viewing outside AMOS or for printing, select it in the hierarchy. Go to **Options > Export** and then lookup a location to store the document at. Enter a **Name** and click **Save** to return to the Export Manual dialog:



Click **OK**, and AMOS will create your document stored in the location you specified.

3.3 Conventions

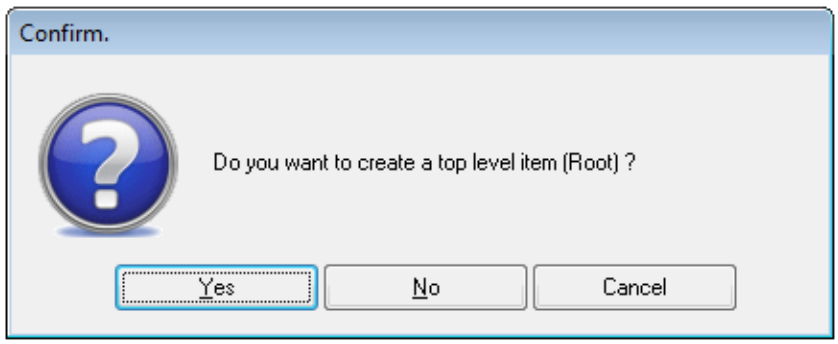
Use the Conventions window to add conventions to the system. Conventions are divided into categories such as ISM, SOLAS, SAR or COLREG. These root folders then contain sub-folders with conventions for each category, forming a hierarchy structure:



Once a convention is established here, you can link it to any relevant procedures in the Procedures window. See section 3.1.4.

To add a new item to the hierarchy:

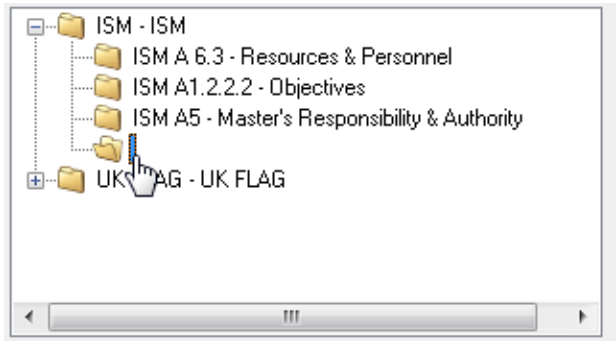
1. Go to **Quality > Conventions**. Click **New**.
2. AMOS asks if you want to add a top-level item:



Click **Yes** to add a new convention category:



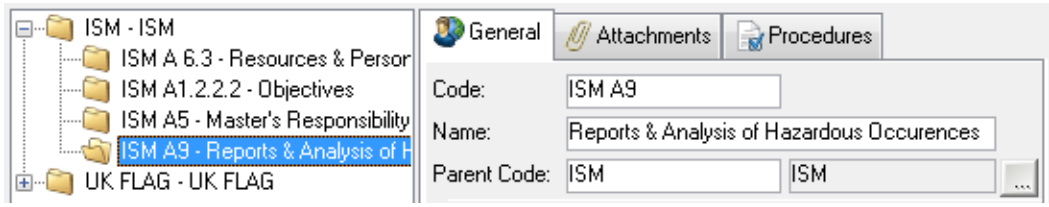
- Or click **No** to add a sub-folder:



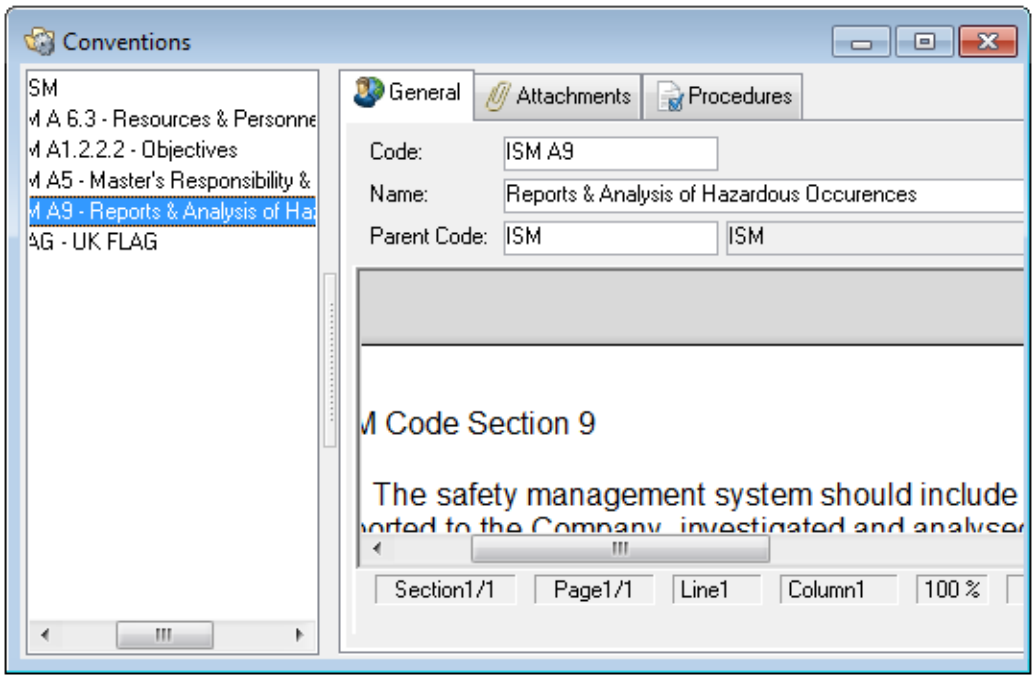
TIP

You can drag and drop folders into different locations within the hierarchy.

3. Enter a **Code** and **Name** on the General tab. For sub-folder, lookup the **Parent Code**:



4. To add content to a convention, go to **Options > Details**. Type, or copy and paste content into the Full Description window.
5. Click **OK** to return to the Conventions window where your content will now appear in the General tab page:



6. **Save** your work.

TIP

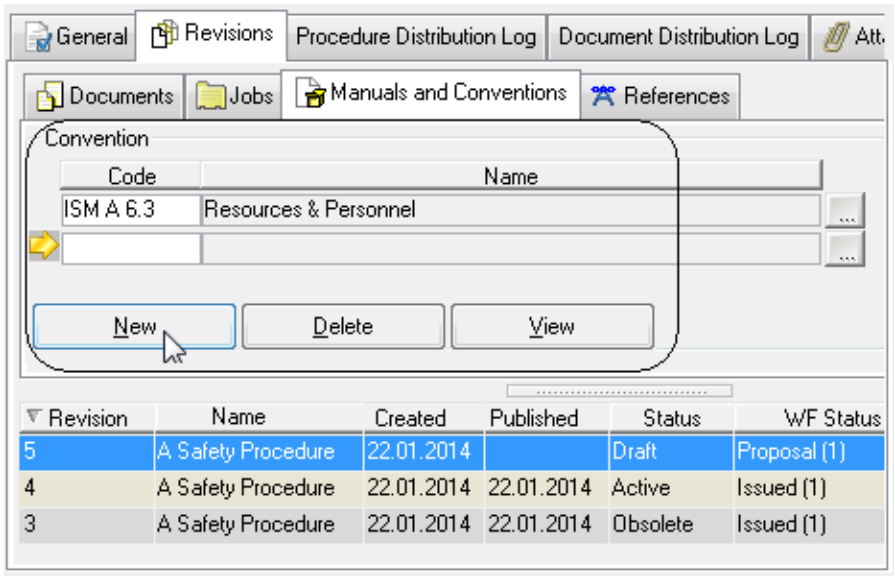
To search for a word or phrase in a document, go to **Options > FInd** and enter some text. The search covers all saved conventions and returns a count of the number of conventions found containing the search criteria.

3.3.1 Conventions - Assigning Procedures And Documents

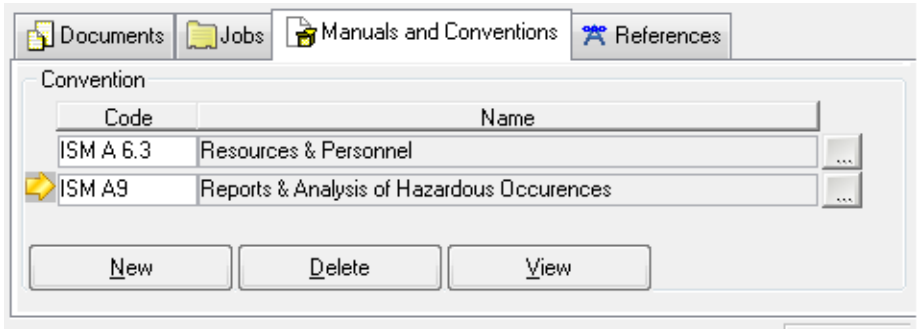
Once you have created a convention you can associate it with any relevant, published procedures. When a convention category or sub-folder is linked to a procedure, the procedure shows up in the Procedures tab.

To link a convention to a procedure:

1. Go to **Quality > Procedures**. Select a procedure in the window.
2. Open the Revisions tab. Select a draft revision: it is not possible to assign conventions to procedure revisions which are obsolete or have already been activated.
3. Open the Manuals and Conventions tab. Click **New** under Convention:



4. Use the lookup to select a convention category or sub-folder:

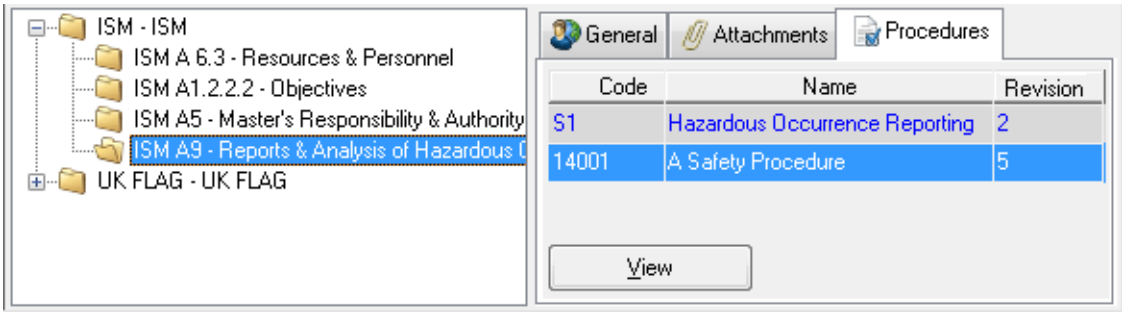


5. **Save**the window. Before this link can be established, the draft procedure revision needs to be published according to your work flow configuration. See section 3.1.6 about publishing procedure revisions.
6. Once the procedure is finalised and published, **Save** and exit the Procedures window.

To See the Procedure in the Conventions Window

Go to **Quality > Conventions**. Select the same convention category/sub-folder in the hierarchy

and open the Procedures tab. The procedure is now listed there with its current active revision number:

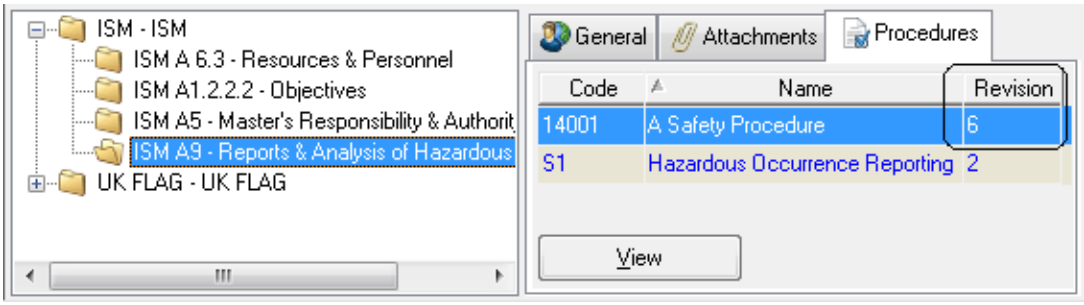


Clicking the **View** button opens the Procedures window.

What Happens When a New Document Revision is Published?

If you later on create and publish a new draft of this procedure document, the same links to conventions will be copied to the new revision. This means that the convention in question will be updated to show the new revision number and reflect any changes.

In the illustration below, the procedure 'A Safety Procedure' was added in Revision 5. Later, Revision 6 was created and published, and so updated here:



3.4 Circulars

You can create circulars to distribute information to installations or installation groups.

To create a circular:

1. Go to **Quality > Circulars**. Click **New**.
2. Enter the details on the left side of the window and **Save** the record.
3. Go to **Options > Details**. Type or copy and paste content into the Full Description window.
4. Click **OK** to return to the Circular window and see your content on the page on the right side.
5. Depending on your work flow, you probably need to issue the circular. Go to **Options > Work Flow...**.
6. Change the status so that the circular is ready for distribution.
7. **Save** the record.

You can track the work flow progress of the circular at **Options > Activity Log**. Unread documents with active versions will be highlighted in red.

Distribute the circular to the installations and groups where it applies:

1. Open the Circular window and select an issued circular.
2. Go to **Options > Distribution**.
3. Click **New** under **Installations** and/or **Installation Groups**.
4. Lookup the installation(s) and/group(s) to distribute to.
5. **Save** and close the window to return to the circular.

You can track the distribution at **Options > Distribution Log**. To view a list of personnel who have read the selected circular, go to **Options > Read Log**.

3.5 Quality Work Orders

AMOS uses work orders to determine which jobs need to be carried out, and to maintain records of work which has been completed.

Once you have prepared and scheduled a job, the next step is start the creation of work orders, so the work can be started. How you do this depends on the type of job schedule you've got:

- **Periodic**. Whenever you create a new job with a periodic schedule, you have to generate the first work order for it manually. After that, new work orders will be generated automatically when the previous one is reported and complete. See section 3.5.1.
- **Trigger Based**. Activate triggers and their linked jobs in the Trigger Jobs dialog whenever the actual event occurs. Work orders will then be generated accordingly. See section 3.5.2.
- **Requisitions**. You can also create one-off work orders, or requisitions, manually. See section 3.5.3.

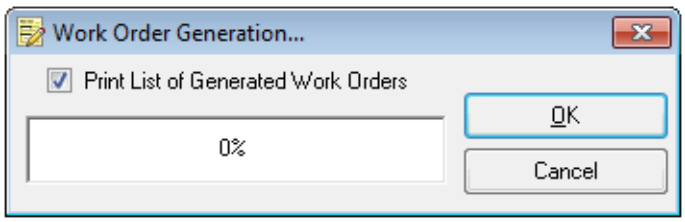
Afterwards, you can plan, carry out and report the work.

- See section 3.5.4 for more about planning work orders.
- See section 3.5.5 for information about creating non conformities from the Work Orders window.
- See section 3.5.6 for information about reporting on work orders.

3.5.1 Generating The First Periodic Work Orders

To generate work orders for new periodic jobs:

1. Go to **Quality > Generate Work Orders**:

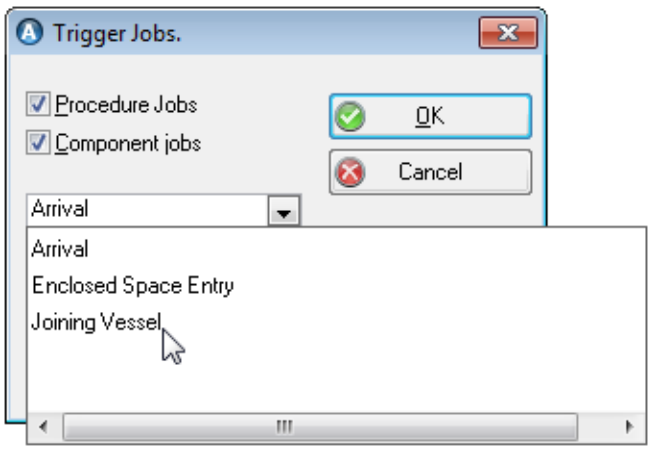


   Flag 'Print List of Generated Work Orders' to see the list immediately for printing.
2. Click **OK**.
3. AMOS generates the work orders. Now you can plan them in the Work Orders window.

3.5.2 Activating Trigger Jobs

Some jobs are 'triggered' by events like 'Arrival', 'Departure' or 'Joining Vessel', etc. To generate Quality and/or Maintenance work orders for these jobs, activate the relevant trigger(s) as necessary:

1. Go to **Maintenance/Quality > Trigger Jobs**. The Trigger Jobs dialog opens.
2. Flag the boxes to trigger **Procedure jobs** (Quality work orders) and/or **Component jobs** (Maintenance work orders).
3. Select the trigger(s) you want to activate from the drop-down list:



4. Click **OK**.

AMOS generates the work orders for any procedure and/or component jobs connected to the selected trigger. If you checked **Show created work orders** in the dialog, the Work Orders window will open to show the new work orders.

AMOS will inform you if no jobs are available to trigger.

See section 3.5.4 about planning quality work orders.

See section 3.5.6 about reporting on quality work orders.

See section 3.1.3.1 about linking triggers to quality jobs.

3.5.3 Observations - Creating A Requisition Work Order

Sometimes you need to perform work that is not defined as a job because it happens so rarely or unpredictably: for example, you install an additional refrigeration unit, or take the ship into dry-dock. For one-off tasks like this, you create a requisition work order for the job, describing the effect, cause, action taken and the time required.

1. Go to **Quality > Non Conformity > Observation**.

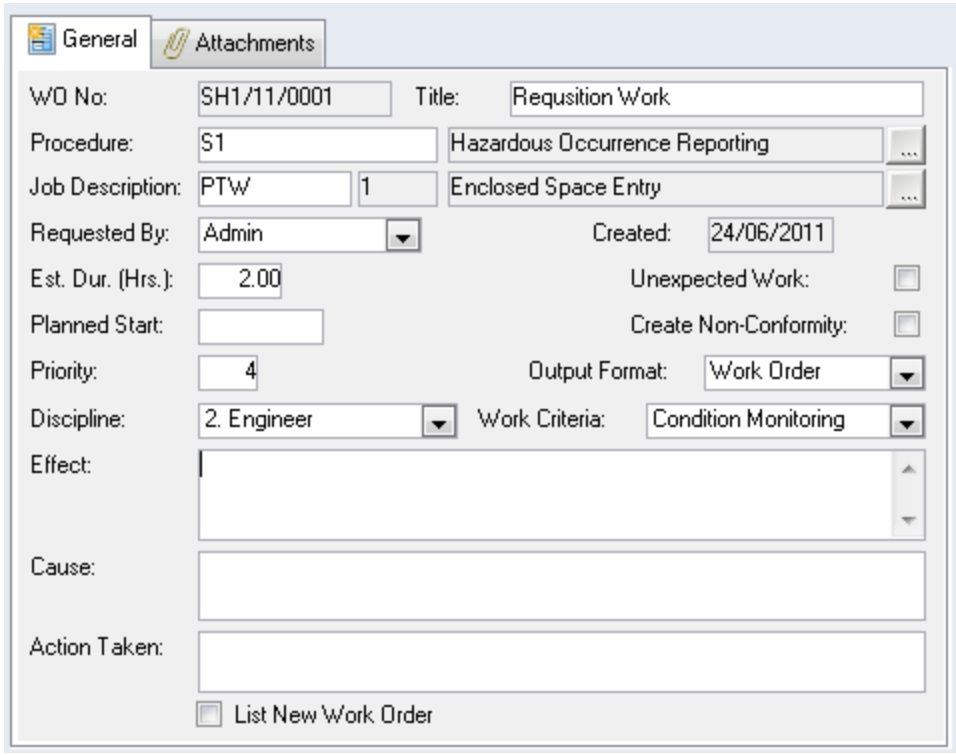


Figure 15 The Observation window - Creating a Requisition

2. Enter a **Title** for the requisition work. Select a **Procedure** and a **Job Description**.
3. Plan the requisition. See section 3.5.4 for more about planning work orders.
4. Flag **Unexpected Work** if the work is rare or unpredicted. Flag **Create Non Conformity** to add the work to the non conformity list.
5. Click **OK**. You can see this work order in the Work Orders window to report on it as usual.

3.5.4 Planning Work Orders

Go to **Quality > Work Orders** to open the Work Orders window. It contains a list of all the work orders present in your system.

Depending on the type of work order - periodic, trigger-based or requisition - some of the information in the General tab > Planning section may or may not already be present.

You can enter or change scheduling details for a work order in the Planning section:

- **Priority**. May be set already on periodic job schedules, or indicated here.
- **Estimated Duration**. The amount of time it should take to complete the job.
- **Due Date**. Set according to a periodic job schedule or the current date when a trigger is initiated. Flag the **Locked** checkbox to prevent this date from being altered.
- **Window**. If there is a number of days on either side of the due date within which the task can be carried out, enter it here.
- **Responsible Discipline**. The employee (by discipline) who is responsible for the job on the work order. You can add more resources to the Required Disciplines tab.
- **Output Format**. The print format for the work order.

- **History Template**. You can select a pre-defined form or checklist (or change the existing one) for use during work reporting.

You can add further information to the Details and Additional Info. tabs. The job description linked to the procedure job the work order is for will appear in the Job Description tab. Any work permits linked to the job description will be listed in the Permits to Work tab.

3.5.4.1 Activity Log

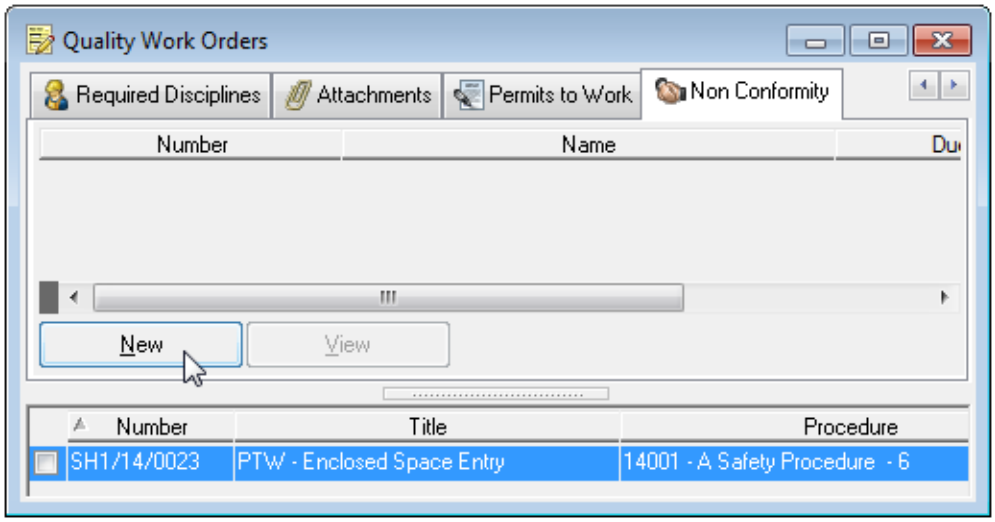
The activity log tracks the progress and activity on work orders:

1. Go to **Quality > Work Orders**. Select a work order.
2. Go to **Options > Activity Log**.
3. Select an activity in the list.

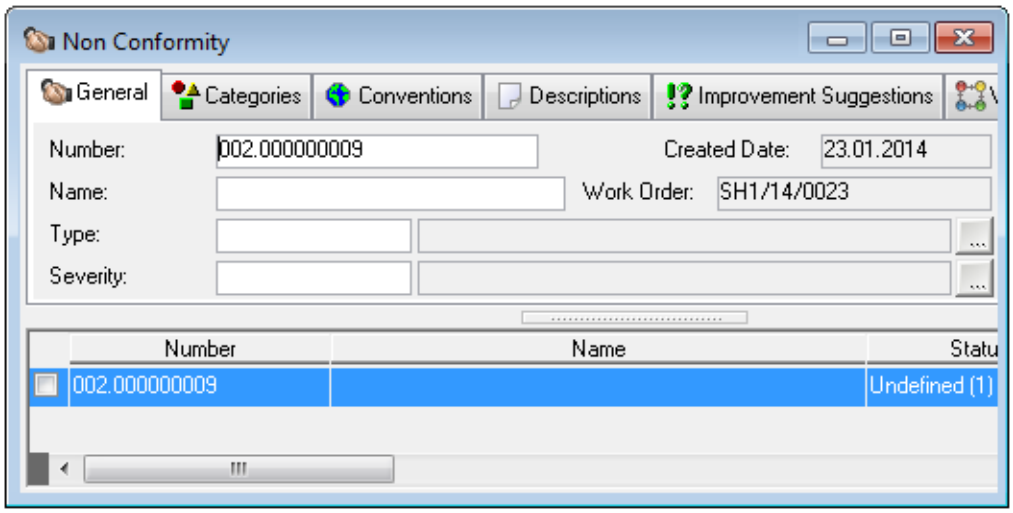
3.5.5 Creating A Non Conformity From The Work Orders Window

As needed, you can raise a non conformity for an incomplete or open work order directly from the Work Orders window:

1. Open the Quality Work Orders window and select a work order.
2. Open the Non Conformity tab and click the **New** button:



This opens the Non Conformity window to a new record. The new non conformity shwos the **Work Order** number:



3. Create the non conformity as usual. See section 3.6.1 for more information.
4. **Save** the record. You can add multiple non conformities for the same work order: click **New** on the toolbar to get a new record.
5. Close the window to return to the work order. The non conformity reference will be listed in the Non Conformity tab on the Work Order window.

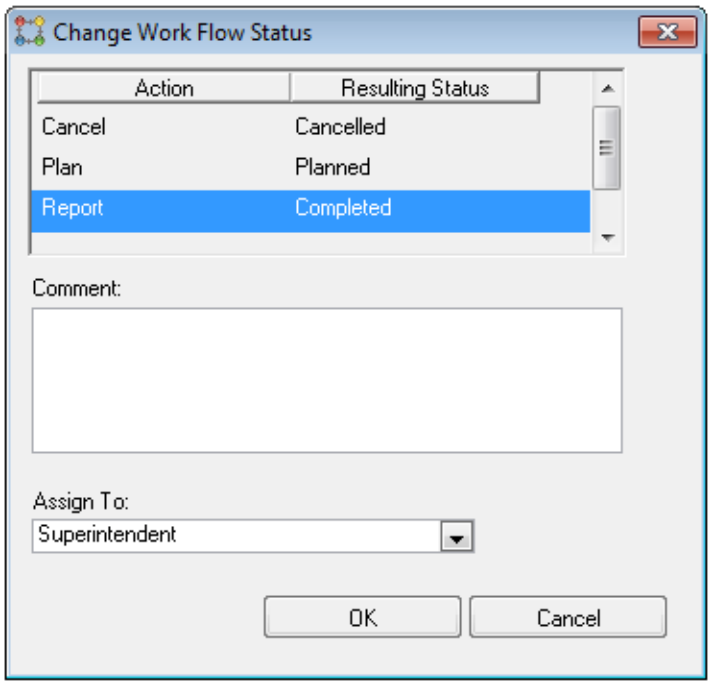
3.5.6 Reporting On A Work Order

As work orders are carried out, you report the work in AMOS using the Work Flow[1]. Any work order can be reported several times and left open until completed. The final step is then to File the completed work order.

To report work:

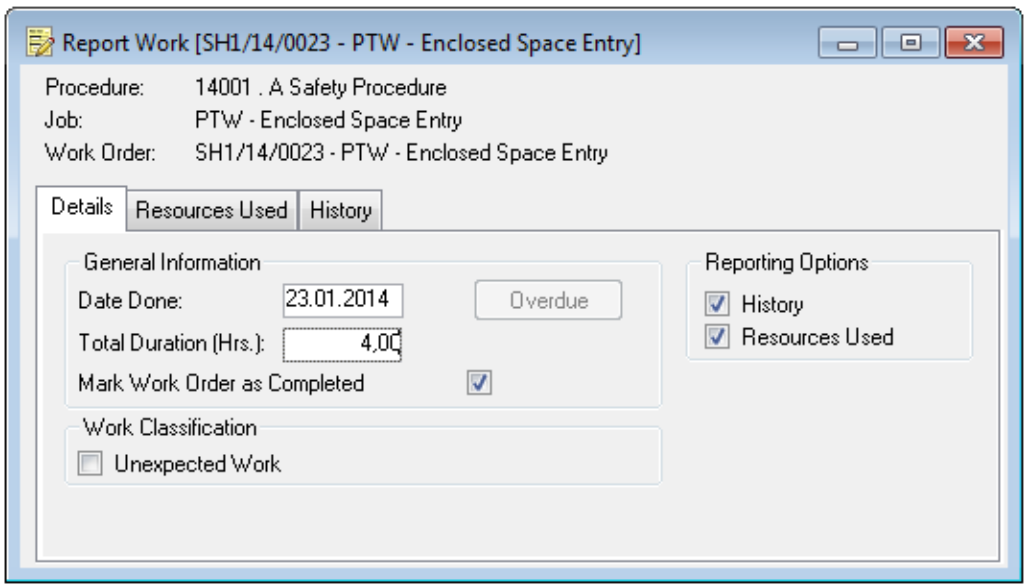
1. Go to **Quality > Work Orders**. Select a work order in the list.
2. Go to **Options > Work Flow**. Available actions and statuses depend on your work flow configuration: choose the reporting action:

[1]Available statuses and the work flow process vary according to the work flow configuration your organisation has defined. The steps outlined in this User Guide are examples based on the standard pre-defined configuration and so may differ from your own procedures.



Click **OK**.

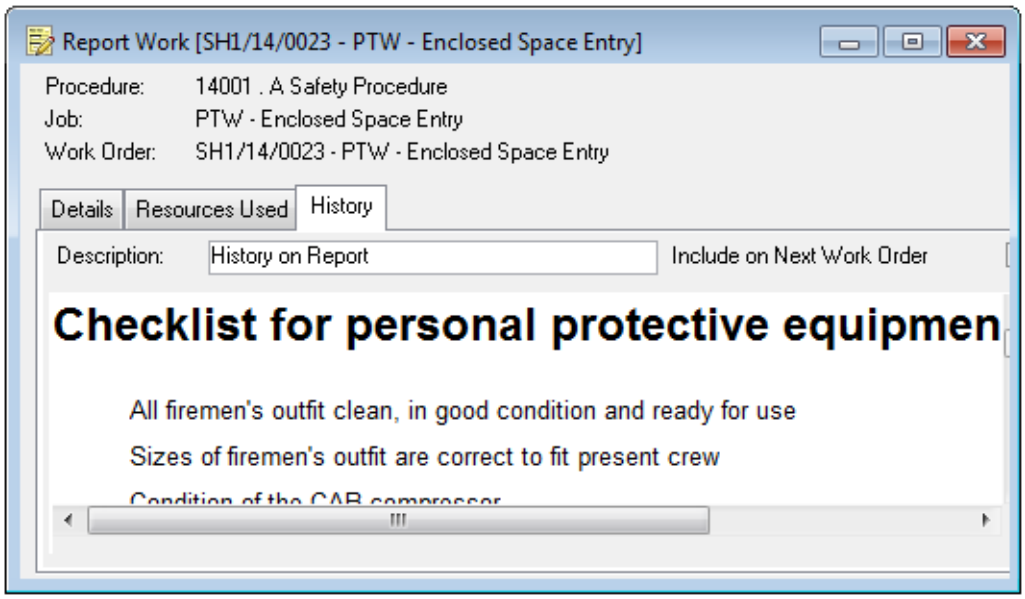
3. The Report Work window opens:



Enter or change the details. If you are reporting the work later than the **Date Done**, change the date and click **Overdue** to enter a reason for the delay.

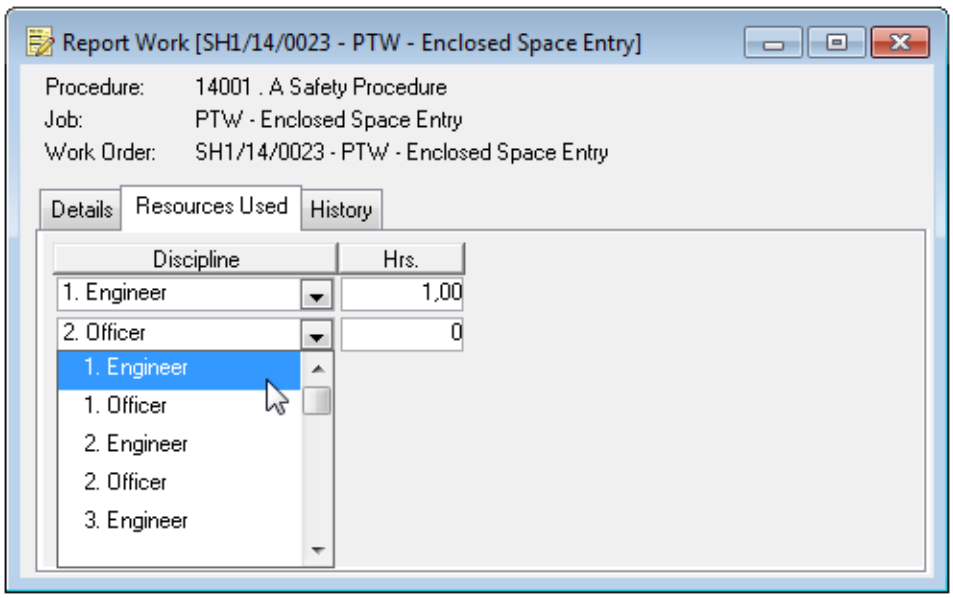
4. Flag the 'History'[1] checkbox to activate the same tab:

[1]Forms or checklists present in the History tab are assigned on the work order itself in the History Template field. If no form has been assigned you will see a blank page and can type in your notes.

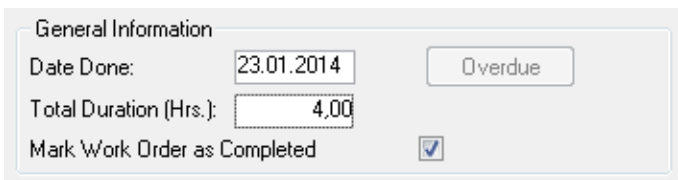


Flag 'Include on Next Work Order' to carry the history forward to the next work order generated.

5. Flag the 'Resources Used' checkbox to activate the same tab:



6. If the work is done and you will not be reporting on it again, flag 'Mark Work Order as Completed':



Otherwise to leave the report open for further reporting, do not flag the box.

7. Click **OK** to close the report and return to the work order.
8. Click **Save**. Depending on your work flow, work orders reported as complete may be automatically filed as well.

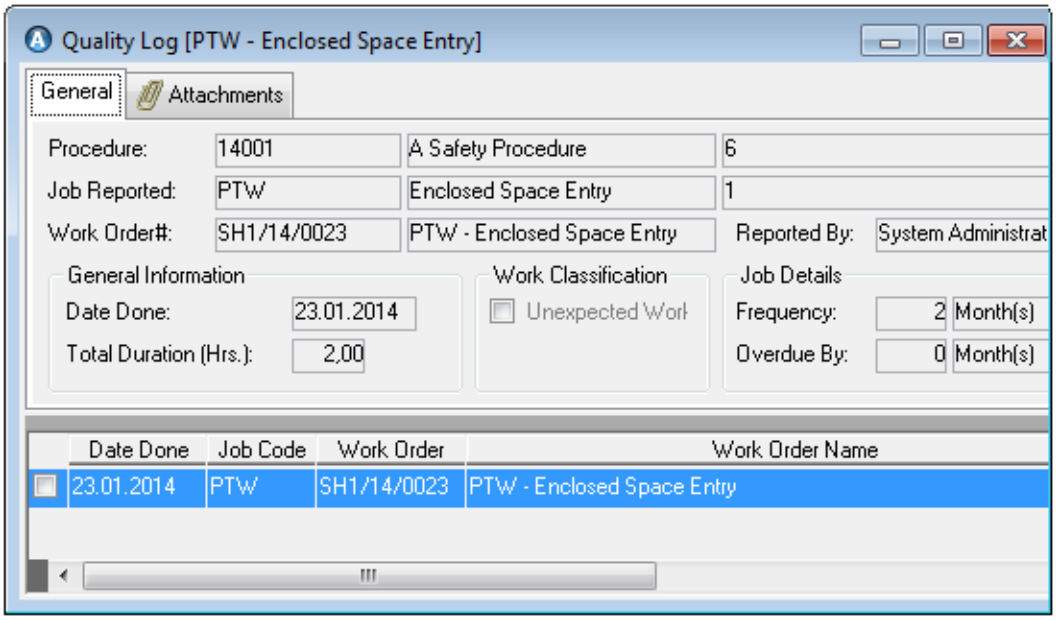
If the work order is for a periodic job, once the current one is marked as complete, AMOS will create the next work order for the same job automatically.

You can keep track of a work order's work flow progress at **Options > Activity Log**.

3.5.6.1 Quality Log

To view the information on reported work orders:

1. Go to **Quality > Work Orders**. Select a work order.
2. Go to **Options > Quality Log**.
3. The Quality Log window opens showing the details reported so far on the selected work order:



4. To access more details on the reported work order:

- Go to **Options > History > Detail** for reported history.
- Go to **Options > Resources Used** for reported information regarding the employees who carried out the work, how many hours were spent, etc.
- Go to **Options > Overdue Reason** to see the reason reported on an overdue work order.

5. Go to **Options > Mark as Read** to confirm that you have read the log. Close the window to return to the work order.

3.6 Non Conformity

Using AMOS you can record and track all aspects of non conformities at any installation, when they happen. Closely monitoring non conformities enables you to identify their causes such as flawed or incorrect procedures. When you have discovered the reason for the occurrence your organisation can then take the necessary steps and corrective actions to resolve non conformities and prevent them from happening again.

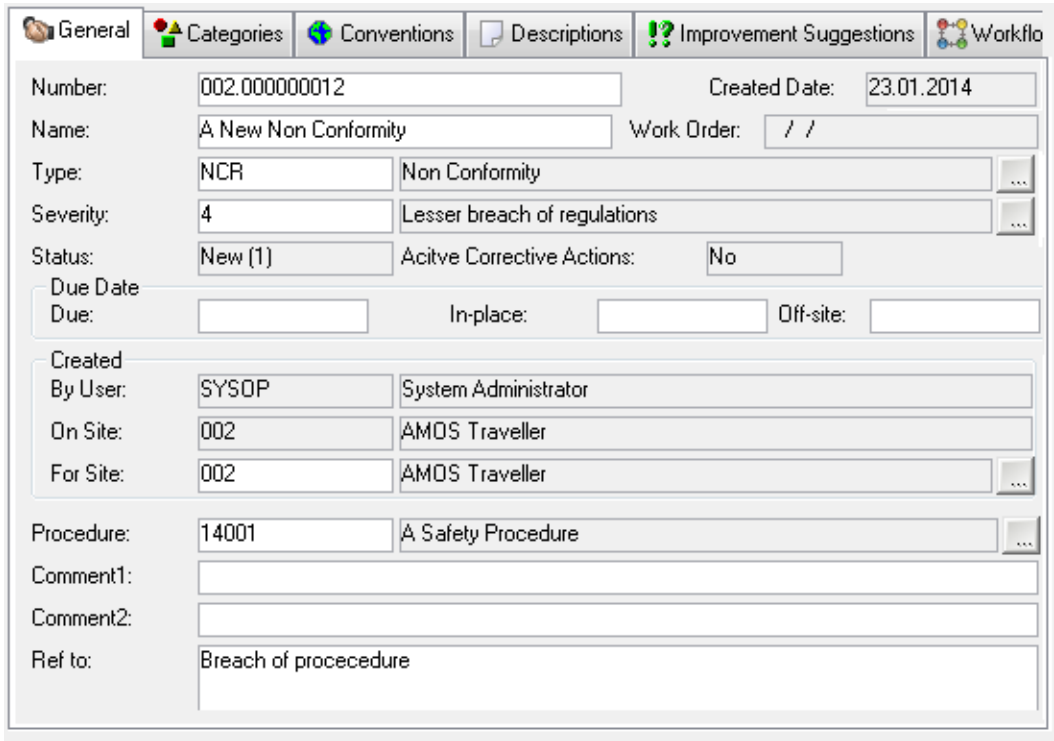
3.6.1 Reporting A Non Conformity

To create a new non conformity record:

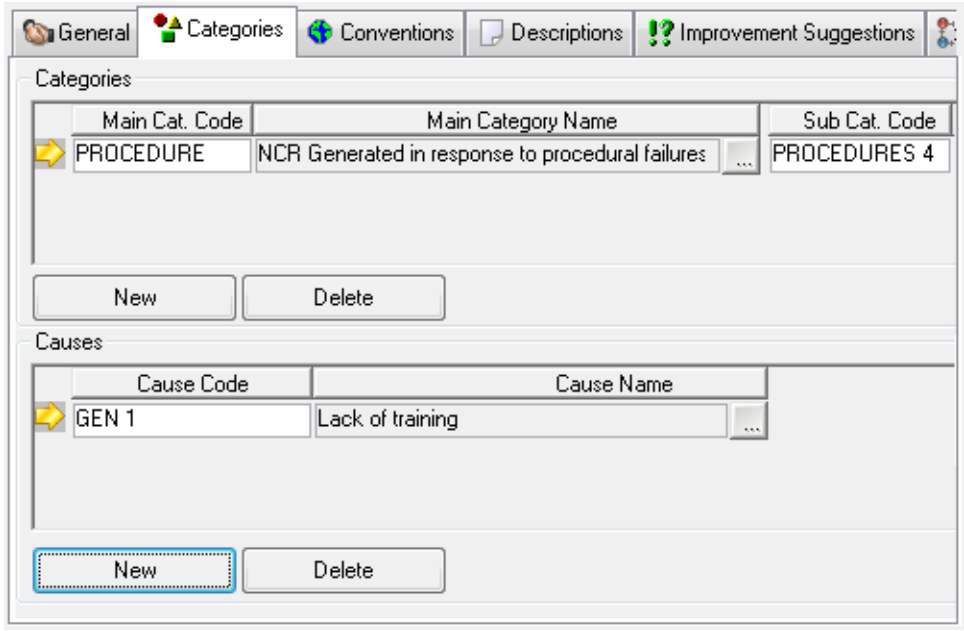
1. Go to **Quality > Non Conformity > Non Conformity**. Click **Create Entry** in the filter or click **New** on the window toolbar.
2. Enter a **Name**.
3. Lookup a **Type**:

- **Major Non Conformity**. A high priority non conformity which has occurred.
- **Non Conformity**. A non conformity which has occurred.
- **Observation**. A warning of a possible non conformity.

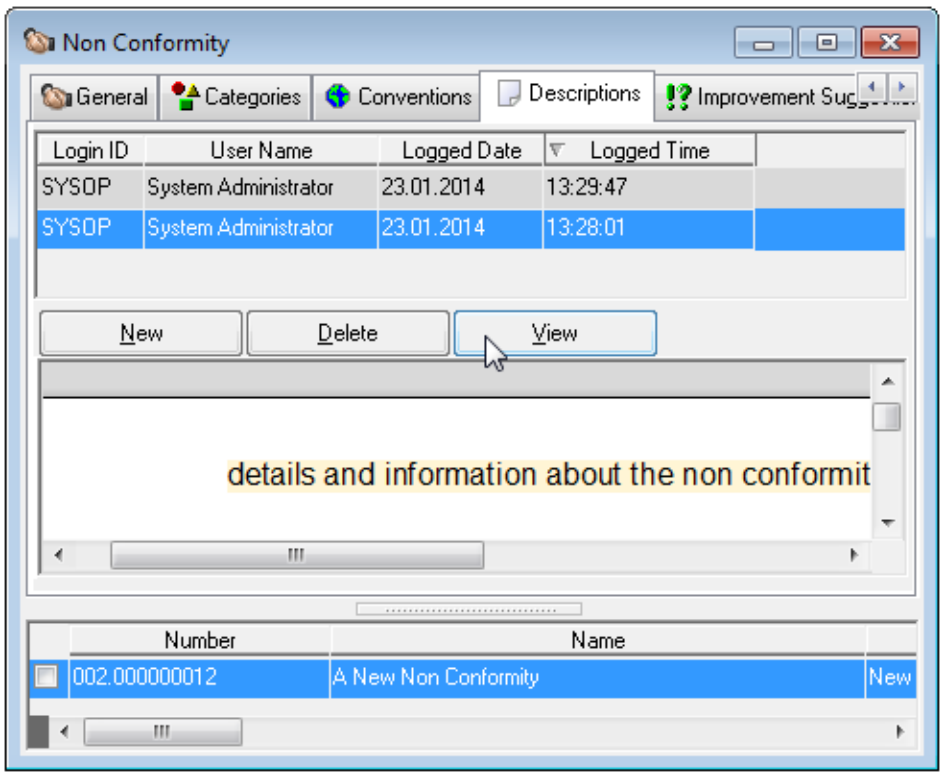
4. Set a **Severity**.
5. Set a **Date Due** for actions to handle to the non conformity. Fill out details in the General tab:



6. **Categorise** the non conformity in the Categories tab. Then, add one or more **Causes** for each category you have listed:

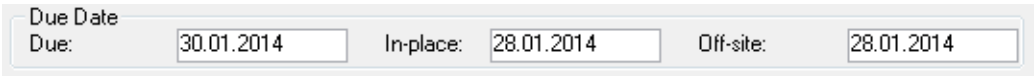


7. To add extra details open the Descriptions tab. Click **New** and then **View** or go to **Options > Details**. This opens a Full Description window where you can enter your text. Click **OK** to return to the tab and see your content there:



This lets you keep a running log. To add more details to the same entry, select it in the tab list and click **View**. To add a new and separate entry, click **New** again.

8. List ways to handle the situation in the Improvement Suggestions tab in the same way. Set a **Due Date** on the General tab which is the last date to handle the non conformity and correct the situation by. You can also enter a date for putting improvements into force at the site in the **In-Place** field, and at the office in the **Off-site** field:



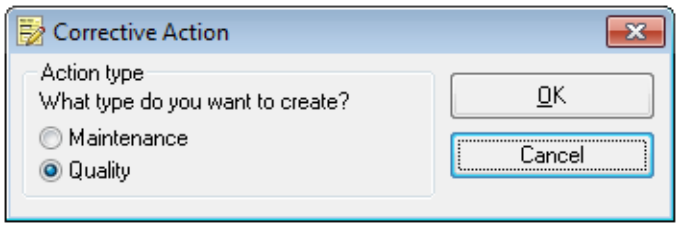
9. Lookup related conventions and list them in the Conventions tab.
10. **Save** the record.

Incidents and non conformities can refer to each other. If an incident is associated with a non conformity it will appear in the Incidents tab and clicking **View** will open it up.

3.6.2 Non Conformity Corrective Actions

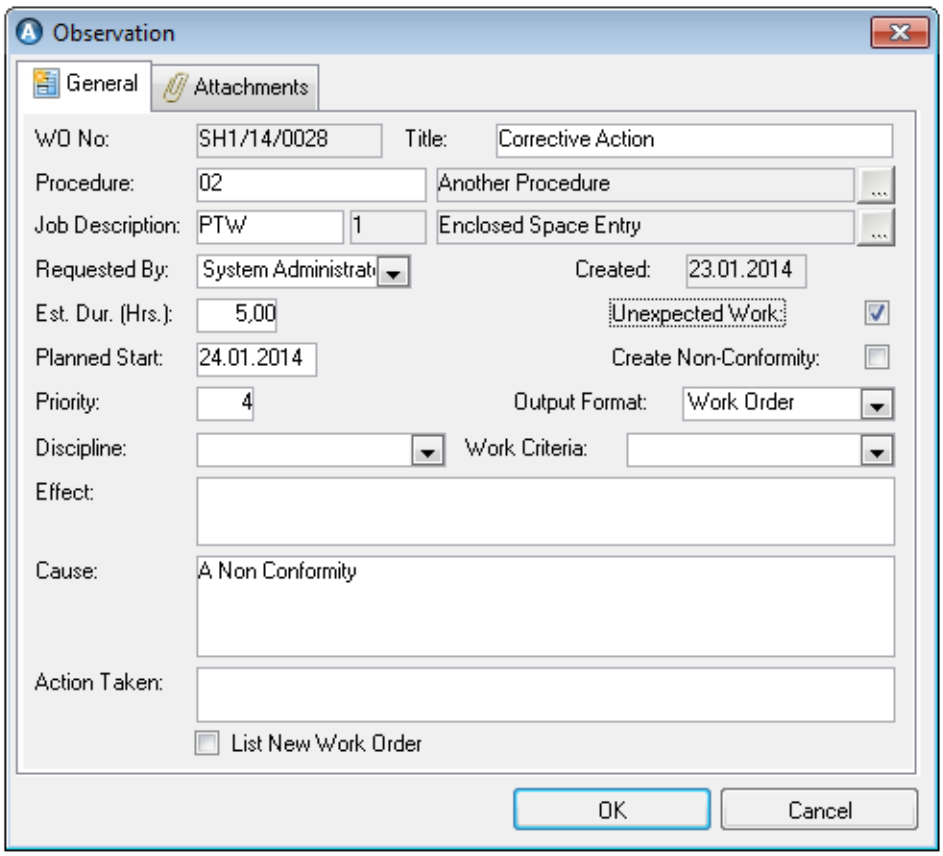
Non conformities cannot be closed until they have been corrected. Create a list of corrective actions to be implemented in the Corrective Actions tab:

1. Go to **Quality > Non Conformity > Non Conformity**. Select a non conformity record in the list.
2. Open the Corrective Actions tab. Click **New**. The Corrective Action dialog opens:



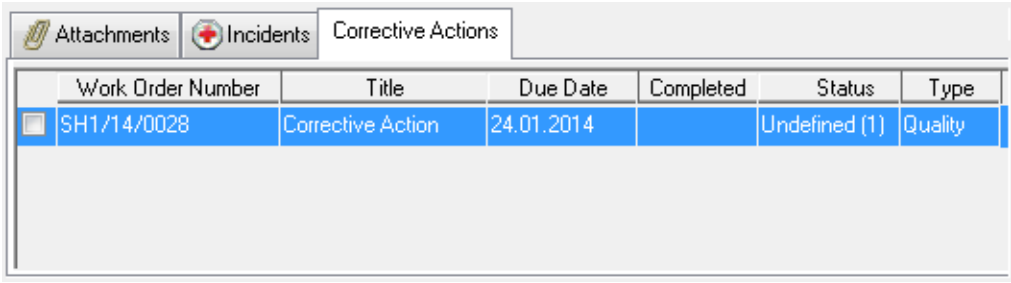
Select **Quality** and click **OK**.

3. The Observation window opens. Create a requisition work order specifying the work needed to fulfil the corrective action:



See section 3.5.3 for more about requisition work orders.

4. When you finish, click **OK** to return to the Non Conformity window. The action is now listed as a work order in the Corrective Actions tab:



Click **New** to add more as needed.

Click **View** to open this work order in the Work Orders window, and carry out the work and report on it as usual. See section 3.5.6. Keep track of progress on the non conformity using the work flow and Workflow Activities tab.

3.7 Incidents

With the Incidents window, AMOS lets you collect and analyse data related to incidents as they occur. Consistent classification and reporting measure the effectiveness of your safety management system. You can report accidents, cargo incidents, hazardous occurrences, improvement suggestions, personal injury, damage to property and pollution.

To create a new incident record:

1. Go to **Quality > Incidents**. Click **New** on the window toolbar.
2. Fill out the details for the incident.
3. Click **Save**.

3.7.1 Defining Causes

Use the Causes of Incident tab to add causes in these four categories:

- Human action.
- Conditions.
- Human factors.
- Job factors.

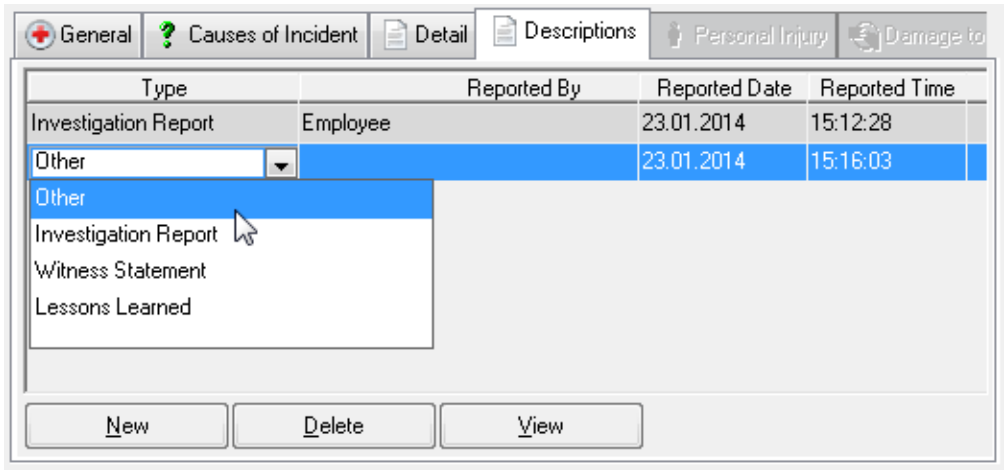
To add a cause:

1. Click the **New** button below a category.
2. Select a cause from the drop-down list.
3. **Save** the changes.

3.7.2 Adding Descriptions

To add extra details to an Incident record:

1. Open the Incidents window and select an incident record.
2. Open the Descriptions tab.
3. Click **New** and select the **Type** of entry: Witness Statements, Investigation Reports, Lessons Learned or Other:

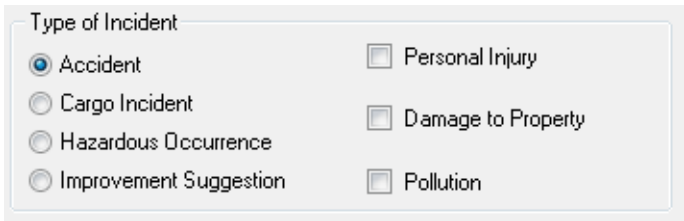


4. Fill in the **Reported By** field.
5. Click **View**. This opens a Full Description window where you can enter your text.
6. Click **OK** to return to the tab.

You can keep a running log with individual entries. To read an entry or add more details to the same entry, select it in the tab list and click **View**. To add a new and separate entry, click **New** again.

3.7.3 Type Of Incident

1. Select the type of incident from the list on the General tab:



2. If you check **Personal Injury**, **Damage to Property** or **Pollution**, the relevant tab(s) activates:

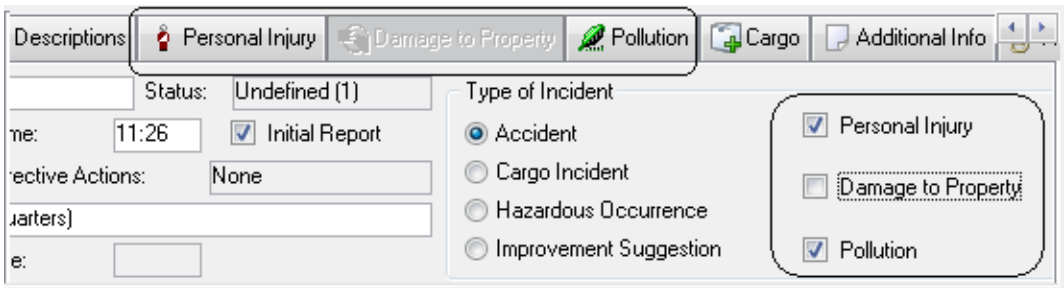


Figure 16 The Type of Incident checkboxes are unchecked and so the relevant tabs are inactive.

3. Enter details in the relevant tabs.
4. **Save** the changes.

3.7.4 Incidents And Non Conformities Or Claims

Non conformities can be related to incidents:

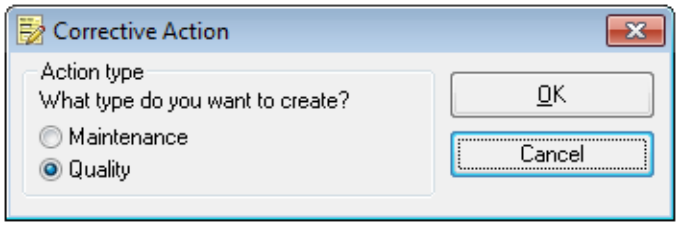
1. Select an incident and open the Non Conformity tab.
2. Click **New** and select a non conformity from the list.
3. **Save** the changes. Select a non conformity in the list and click **View** to open it.

Claims are registered separately in the **Quality > Claims** window, and linked to incidents if relevant. You can see any claims for an incident in the Claims tab; clicking the **View** button opens the record in the Claims window. See section 3.8 for more about claims.

3.7.5 Incidents - Corrective Actions

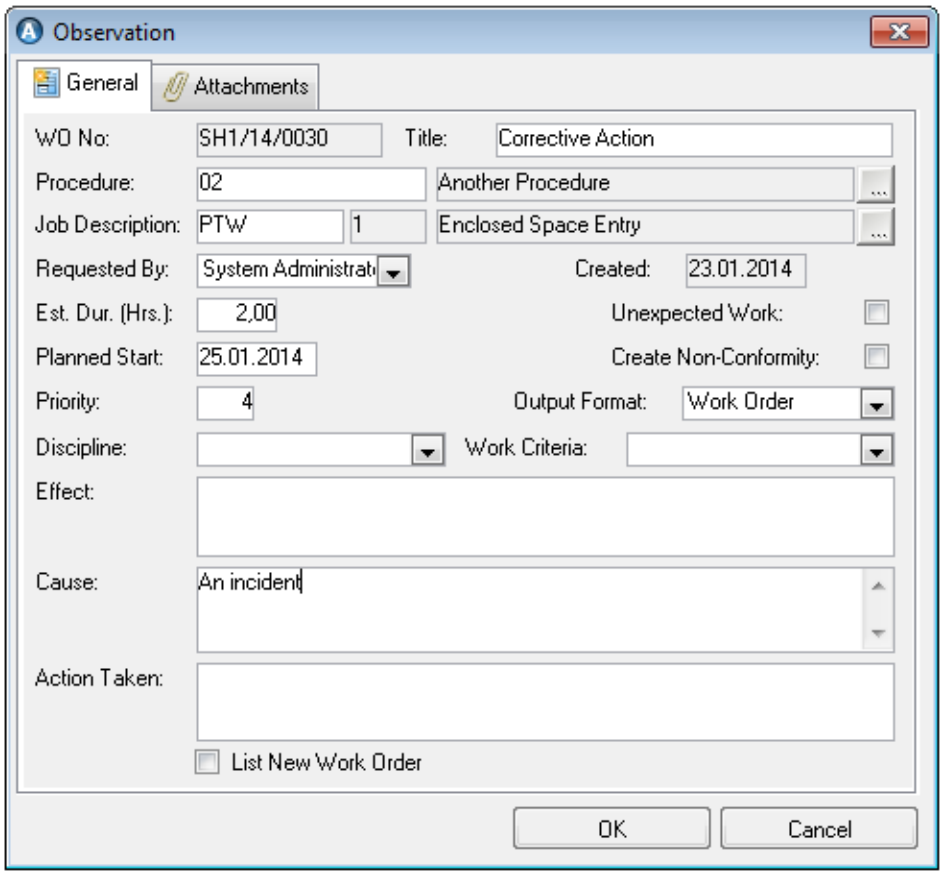
Incidents cannot be closed until they have been corrected. Create a list of corrective actions to be implemented in the Corrective Actions tab:

1. Go to **Quality > Incidents**. Select an incident record in the list.
2. Open the Corrective Actions tab. Click **New**. The Corrective Action dialog opens:



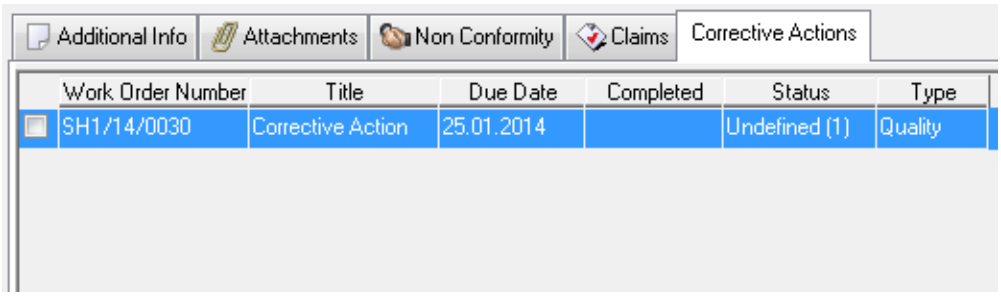
Select **Quality** and click **OK**.

3. The Observation window opens. Create a requisition work order specifying the work needed to fulfil the corrective action:



See section 3.5.3 for more about requisition work orders.

4. When you finish, click **OK** to return to the Incidents window. The action is now listed as a work order in the Corrective Actions tab:



Click **New** to add more as needed.

Click **View** to open this work order in the Work Orders window, and carry out the work and report on it as usual. See section 3.5.6.

3.7.6 Changing Work Flow Status On Incidents

As an incident record is processed, corrective actions are carried out, and it is eventually ready to be closed, update the status using the work flow[1]:

1. Open the Incidents window and select an incident.
2. Go to **Options > Work Flow**. Available actions and statuses depend on your work flow configuration: choose an action.
3. Enter any **Comments** regarding this status change.
4. **Assign To** the user who should receive notification of this status transformation.
5. Click **OK** to return to the Incidents window, and update the status.
6. **Save** the changes. To keep track of an incident's work flow progress, go to **Options > Activity Log**.

3.7.7 Closing And Reopening Incidents

To close a reported incident, select it in the Incidents window and then go to **Options > Close**.

To reopen the incident, select it once again and go to **Options > Reopen**.

3.8 Insurance, Claims And Emergency Response

Use the Insurance window to register and keep track of any insurance policies you hold. When you need to file a claim against an insurance policy, enter it in the Claims window and then track it to settlement.

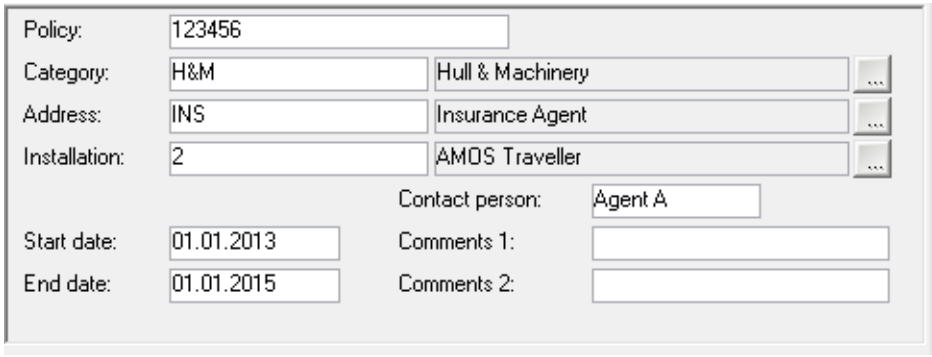
3.8.1 Listing Insurance Policies

To list a new insurance policy:

1. Go to **Quality > Insurance**. Click **Create Entry** in the filter or click **New**in the window toolbar.
2. Enter the **Policy** number.

[1]Available statuses and the work flow process vary according to the work flow configuration your organisation has defined.

3. Select a **Category**, **Address**, and the **Installation** the insurance policy applies to:



4. Enter the **Start** and **End** dates of the policy.
5. **Save** the policy.

3.8.2 Entering A Claim

If you need to register a claim against one of your insurance policies:

1. Go to **Quality > Claims**.
2. Click **New**on the window toolbar.
3. Enter a **Claim Number**.
4. Select a name in the **Payment Approved by** field.
5. Enter the **Currency Code** and **Amount** of the claim.
6. Select an **Insurance** policy and enter the relevant dates.
7. Open the Incidents tab to list any incidents associated with the claim.
8. **Save** the changes. If you have a defined work flow, access the dialog for changing statuses at **Options > Work Flow** and track work flow progress at **Options > Activity Log**.

Enter a description for each part of the claim in the Claim Lines tab. To create a new claim line:

1. Open the Claim Lines tab and click **New**.
2. Lookup a **Non Conformity** and select the **Currency Code**.

   Lines can have differing currency codes; AMOS will convert them to the currency on the General tab when you calculate the total amount.
3. Enter a **Price**.
4. **Save** the line.

3.8.3 Calculating The Amount Of A Claim

Once you have a list of claim lines, to calculate the total amount owing go to **Options > Calculate Amount**.

This converts all currencies listed on the claim to the currency set in the General tab of the Claim window. If there is a discrepancy between the claim line amounts and the total in the **Amount** field, AMOS will ask you to update the amount.

3.8.4 Emergency Response System

The Emergency Response System (ERS) is your list of contacts to notify in an emergency. This window is for listing contact information for relevant authorities in countries all over the world. You receive updates to this information in the case of any changes. You can also add specific information about contacting customers, insurance companies, flag state authorities and other vital parties.

The ERS module complies with such international standards as SOPEP and OPA.

To add a new contact:

1. Go to **Quality > Emergency Response System**.
2. Select a contact folder in the hierarchy on the left: External, Internal and Vessel Specific contacts.
3. Click **New** on the toolbar.
4. Enter contact details on the right side.
5. **Save** the contact.

CHAPTER 4 Risk Management

The AMOS Risk Management module helps avert potential problems or accidents before they occur. Providing your shipboard personnel with an interactive means to identify, record, analyse and safeguard against potential risks, Risk Management assists you in meeting mandatory safety management objectives.

Risk management usually involves a central setup[1] which is then distributed to multiple installations:

- The QA Manager defines one or more risk matrices with which AMOS will calculate risk index and level values during an assessment.
- The QA Manager also defines 'generic' risk scenario types and links these with the maintenance jobs they apply to.

  When scenario types are ready for use, he/she distributes them to the installations where they are needed.
- End users at installations determine which jobs are coming up for which they need to perform risk assessments. They create risk scenarios based on the scenario types, and evaluate and assess the risks locally.

4.1 The Risk Assessment Matrix

A commonly used methodology for Risk Analysis is the Likelihood/Severity matrix. Once the components of a matrix are defined, the matrix and the Risk Index Method and Risk Level Method formulae defined with it can be applied to Risk Scenario Assessments at any installation.

User-defined 'likelihood' values appear on the vertical axis and the 'severity' values on the horizontal axis:

[1] Each of the main entities involved - Risk Matrix, Scenario Type, Scenario and Assessments - requires a customised work flow configuration.

Likelihood of Harm	Severity of Harm			
	Negligible (1)	Marginal (2)	Critical (3)	Catastophic (4)
Improbable (1)	Acceptable	Acceptable	Acceptable	Action Required
Remote (2)	Acceptable	Acceptable	Acceptable	Action Required
Occasional (3)	Acceptable	Acceptable	Action Required	Unacceptable
Probable (4)	Acceptable	Action Required	**Unacceptable**	Unacceptable
Frequent (5)	Acceptable	Action Required	Unacceptable	Unacceptable

Together, AMOS uses the likelihood and severity values to calculate the Risk Index and the Risk Level of various scenarios during on-site risk assessments.

To configure a risk matrix:

1. Create a new matrix. See section 4.1.1.
2. Create lists of likelihood and severity values. See:
   - section 4.1.3 about likelihood values.
   - section 4.1.4 about severity values.
3. Define risk indexes and levels. See:
   - section 4.1.5 about risk indexes.
   - section 4.1.6 about risk levels.
4. Apply risk index labels onto the matrix cells. See section 4.1.7.
5. Issue the matrix for use with scenario types. See section 4.1.8.

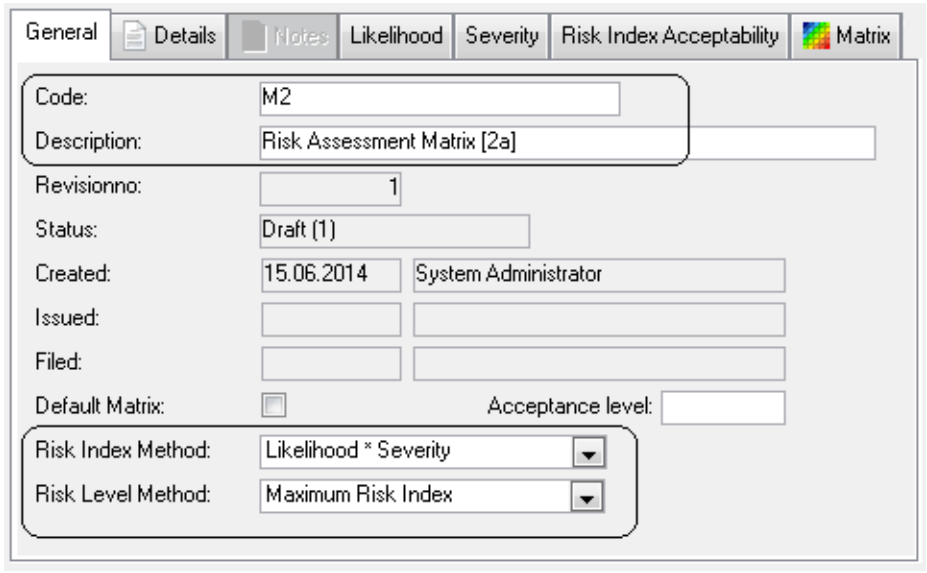
4.1.1 Creating A Matrix

To create a new matrix:

1. Go to **Assessment > Risk Matrix**.
2. Click **New**.

> **TIP**
>
> Select an existing matrix and go to **Options > Duplicate** to create a new, editable copy with status 'draft'.

3. Enter a **Code** and **Description**:



4. Select a **Risk Index Method** and a **Risk Level method**. See section 4.1.2 for more information about how AMOS uses each method to calculate risk index values and risk levels.
5. **Save** the matrix entry.

4.1.2 How Does AMOS Calculate Risk Index Values And Risk Levels?

When you create a risk assessment matrix, you define numbered **Likelihood** and **Severity** values such as the ones shown in the first illustration below.

Likelihood - Improbable (1), Remote (2), etc.
Severity - Negligible (1), Marginal (2), etc.

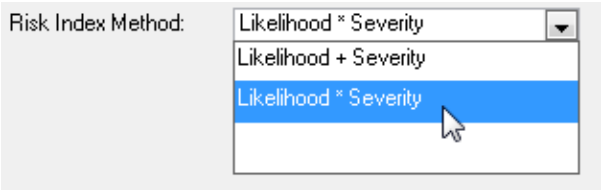
When likelihood and severity values are combined they fall into different *Risk Indexes*.

EXAMPLE

A user assesses a risk's likelihood as improbable and its resulting severity as negligible. Such a risk is probably acceptable; while the combination of improbable likelihood and catastrophic severity requires action.

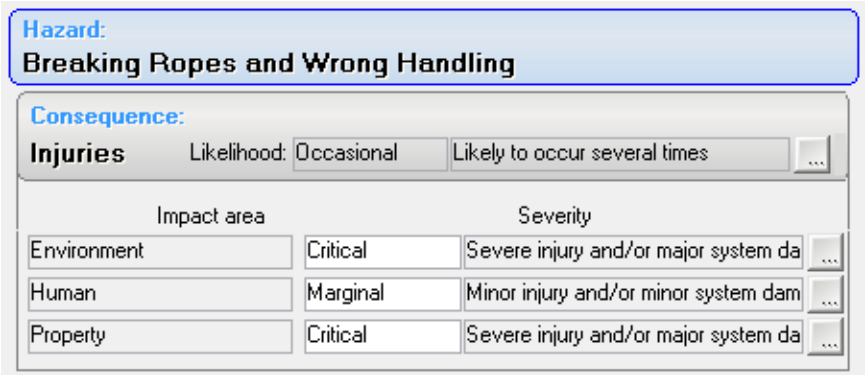
Likelihood of Harm	Severity of Harm			
	Negligible (1)	Marginal (2)	Critical (3)	Catastrophic (4)
Improbable (1)	Acceptable	Acceptable	Acceptable	Action Required
Remote (2)	Acceptable	Acceptable	Acceptable	Action Required
Occasional (3)	Acceptable	Acceptable	Action Required	Unacceptable
Probable (4)	Acceptable	Action Required	Unacceptable	Unacceptable
Frequent (5)	Acceptable	Action Required	Unacceptable	Unacceptable

When you create a risk assessment matrix, you specify a **Risk Index Method** on the General tab. There are two options:



AMOS uses the selected method and the likelihood and severity values to calculate the **Risk Index** value for every evaluated consequence during an assessment.

A user assesses a consequence defining its **Likelihood** as 'Occasional' and assigning a **Severity** on each of the impact areas:

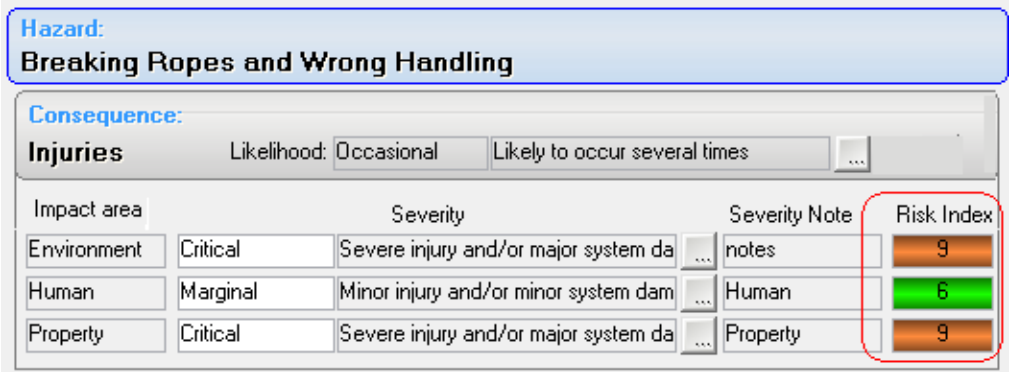


Since the **Risk Index Method** is set to 'Likelihood * Severity' AMOS calculates the resulting Risk Index value on each impact area like this:

For 'Environment' [Occasional] 3 * [Critical] 3 = 9

For 'Human' [Occasional] 3 * [Marginal] 2 = 6

For 'Property' [Occasional] 3 * [Critical] 3 = 9



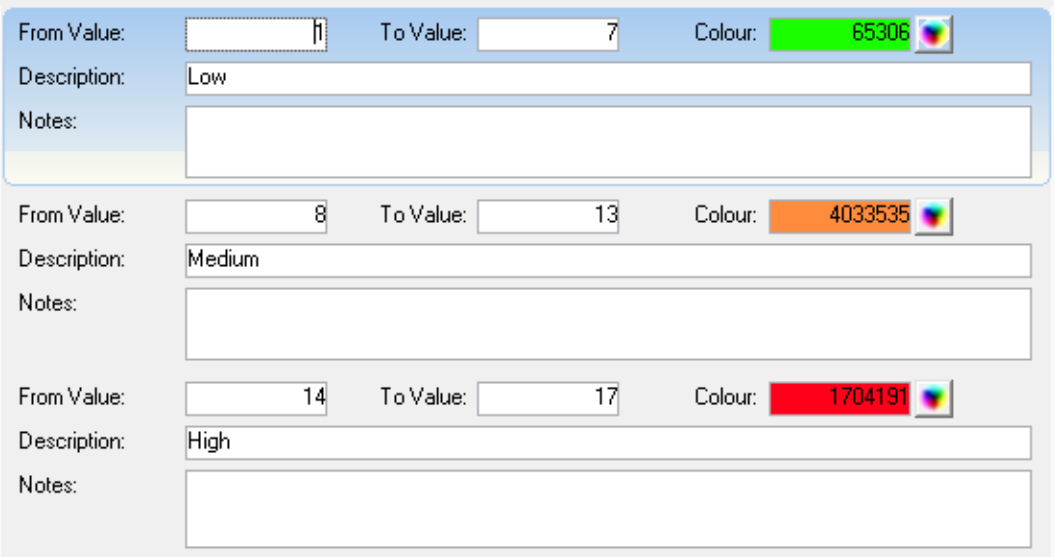
Using the other **Risk Index Method** 'Likelihood + Severity' AMOS would add the same values together, rather than multiplying them:

For 'Environment' [Occasional] 3 + [Critical] 3 = 6

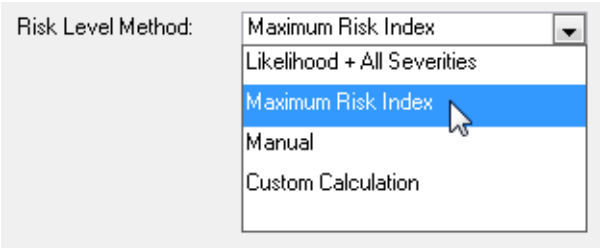
A *Risk Level* is the magnitude of a risk or combination of risks, expressed in terms of the combination of the risk's severity and likelihood.

When you create a risk matrix, you define levels of risk acceptability: for example, *Low*, *Medium*, *High*. Assessed consequences fall into these risk levels according to their calculated risk index values. Each risk level covers part of the total range of possible index values[1]:

[1]See section 4.1.6 for more about Risk Level Acceptability and how to determine the range of values.

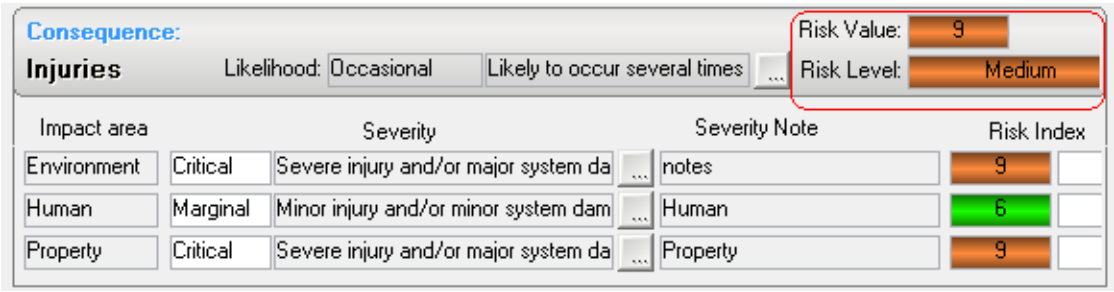


When you create a risk assessment matrix, you specify a **Risk Level Method** on the General tab:



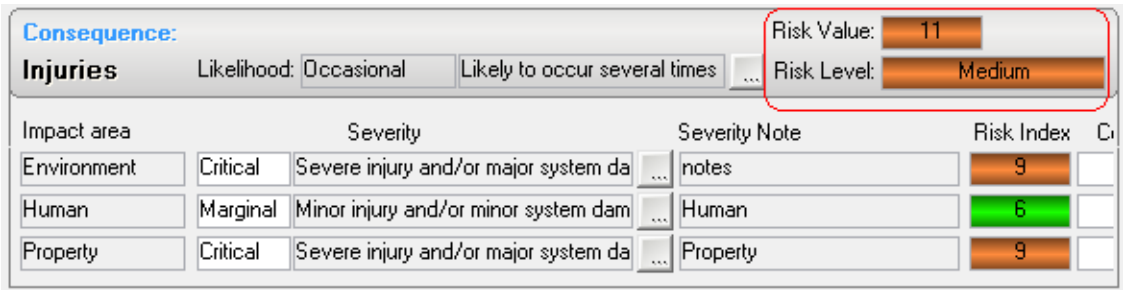
AMOS uses the selected method and the likelihood and severity/index values to calculate the **Risk Level** for every evaluated consequence during an assessment.

Since the method is set to 'Maximum Risk Index' and the highest impact area value is 9, the **Risk Value** on the evaluated consequence shown below is 9 and so the **Risk Level** is set to 'Medium':



Using the **Risk Level Method** 'Likelihood + All Severities' AMOS would add the likelihood value and each severity value together to arrive at a **Risk Value** of 11 and a 'Medium' **Risk Level**:

[Occasional] 3 + [Critical] 3 + [Marginal] 2 + [Critical] 3 = 11



There are two other **Risk Level Methods** available:

- **Manual**. Allows the user to manually add a **Risk Value** into the risk assessment for each consequence.
- **Custom Calculation**. Contact your local support office for more information about creating and using custom calculations.

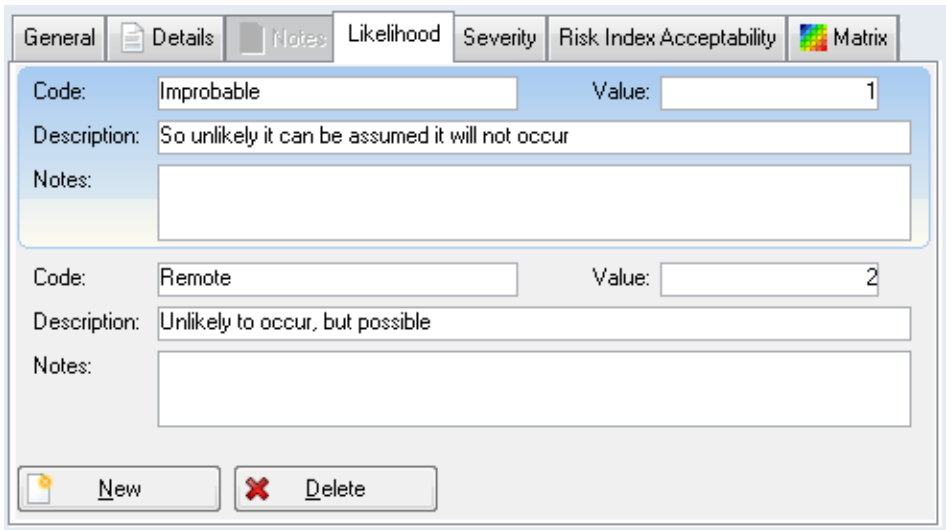
4.1.3 Defining Likelihood Values

Some risk scenarios are very likely to occur, or may occur frequently. Others are less likely or more occasional.

Add a list of likelihood definitions to the matrix:

1. Select a matrix and open the Likelihood tab.
2. Click **New** at the bottom of the tab.
3. Enter a **Code** and **Description** and any **Notes**.

   Create a list of likelihoods such as, Improbable, Remote, Occasional, Probable, Frequent.
4. Add a **Value** to each entry. AMOS needs these values to calculate the Risk Index and Risk Level during assessment:



5. **Save** the tab.

4.1.4 Defining Severity Values

Whenever a risk scenario actually does occur, there will be consequences of varying severity.

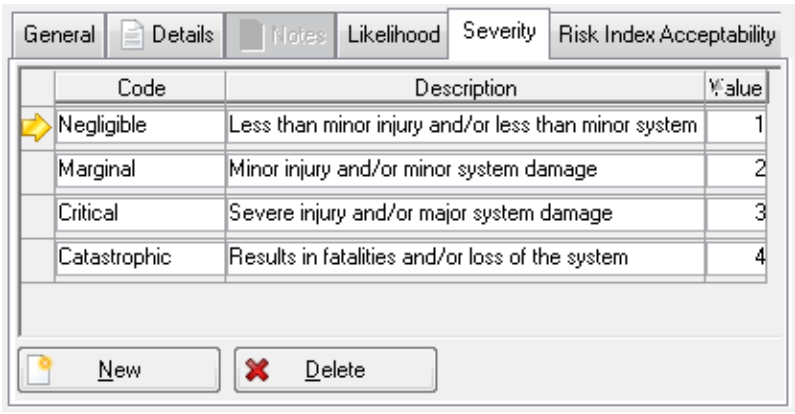
Add a list of severity definitions to the matrix:

1. Select a matrix and open the Severity tab.
2. Click **New** at the bottom left of the tab.

3. Enter a **Code** and **Description**.

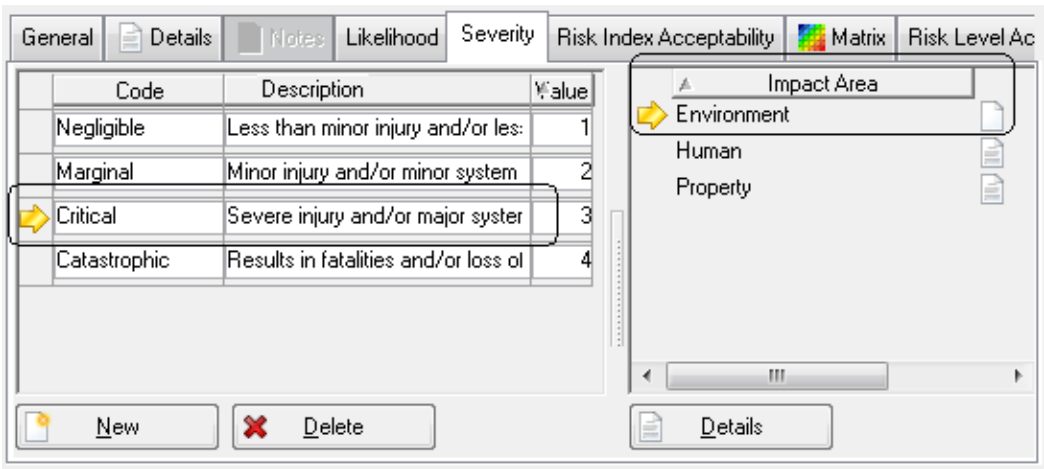
   Create a list of severities like Negligible, Marginal, Critical and Catastrophic.

4. Add a **Value** to each entry. AMOS needs these values to calculate the Risk Index and Risk Level during assessment:



5. Every predefined **Impact Area** is listed on the right side of the tab.

   Select a severity value and click on the notes icon next to an impact area or click the **Details** button:



   Enter details in the Full Description window and close it.

> **EXAMPLE**
>
> The extent of the damage caused to the environment by an occurrence of critical severity.

   The notes icon changes when text is added:

   Environment

   For a severity value to be available for selection in conjunction with an impact area on a risk scenario assessment, notes are required.

6. **Save** the tab.

4.1.5 Risk Index Acceptability

When likelihood and severity values are combined they fall into different *Risk Indexes*.

EXAMPLE

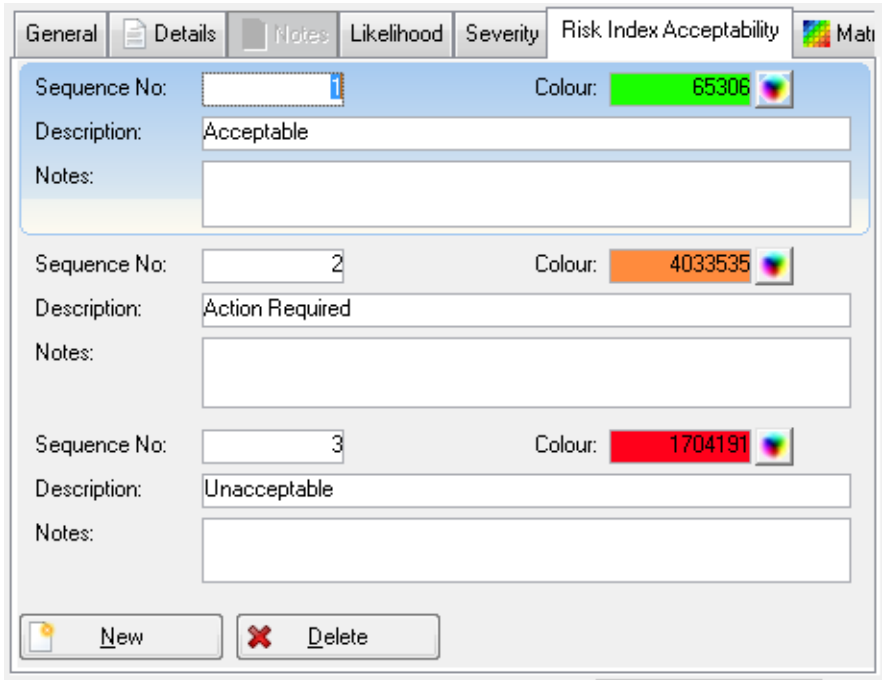
A user assesses a risk's likelihood as improbable and its resulting severity as negligible. Such a risk is probably acceptable; while the combination of improbable likelihood and catastrophic severity requires action. To create a risk index, you define labels and colours in the Risk Index Acceptability tab and then apply them to the matrix:

Likelihood of Harm	Severity of Harm			
	Negligible (1)	Marginal (2)	Critical (3)	Catastrophic (4)
Improbable (1)	Acceptable	Acceptable	Acceptable	Action Required
Remote (2)	Acceptable	Acceptable	Acceptable	Action Required
Occasional (3)	Acceptable	Acceptable	Action Required	Unacceptable
Probable (4)	Acceptable	Action Required	Unacceptable	Unacceptable
Frequent (5)	Acceptable	Action Required	Unacceptable	Unacceptable

Define risk index labels and the colours to associate with them:

1. Select a matrix and open the Risk Index Acceptability tab.
2. Click **New** at the bottom of the tab.
3. Enter a **Sequence** to determine the sort order for the risk index on the matrix printout.

   Add a **Description** like Acceptable, Action Required, Unacceptable. Add any **Notes** and lookup a **Colour** for each one:



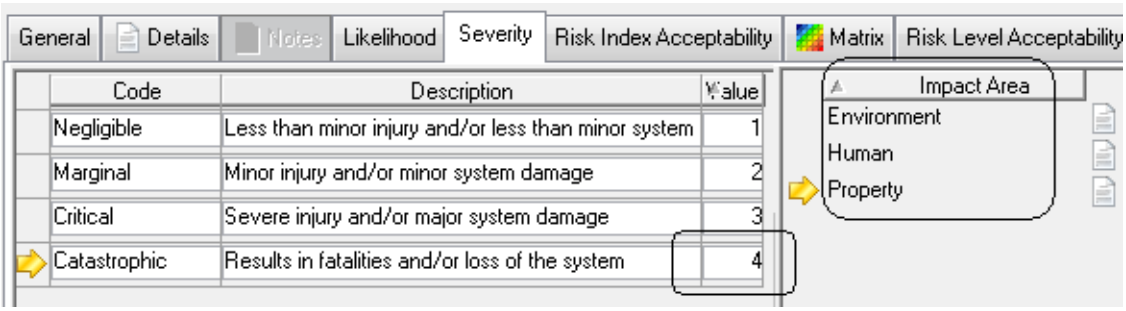
4. **Save** the tab.

4.1.6 Risk Level Acceptability

Assessed risks fall into risk levels according to their calculated risk index values. This means your risk levels need to span the entire range of possible risk index values from 1, to the maximum risk value possible.

To calculate the range of values you need:

Take the maximum severity value from the Severity tab and multiply it by the number of impact areas:



4 * 3 = 12

Then add this number to the maximum value in the Likelihood tab:



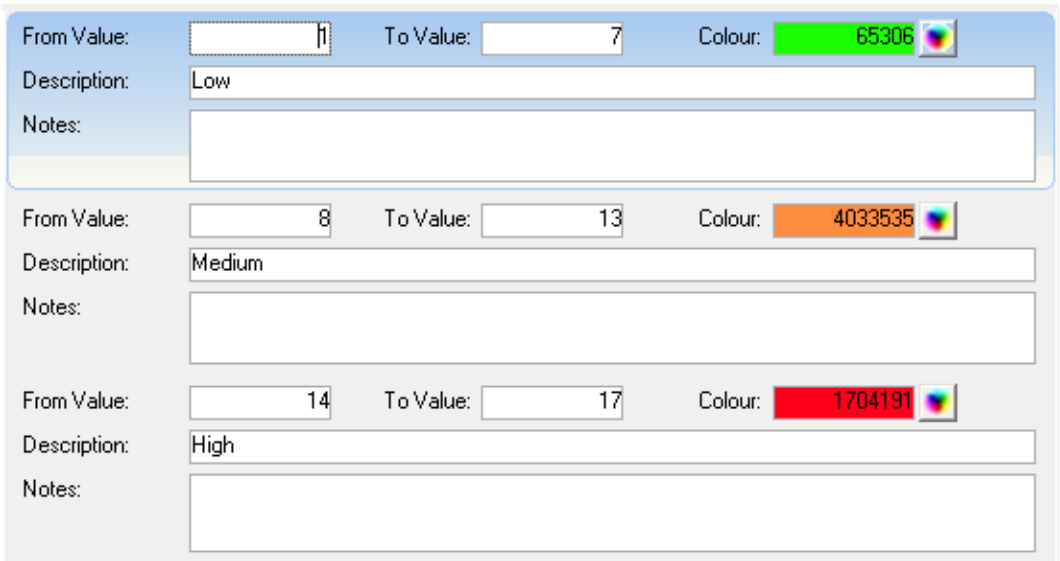
12 + 5 = 17

Decide how many risk levels you want to use, for example Low, Medium and High. Split the range of values (1 - 17) up over these three levels:

Low - From 1 to 7

Medium - From 8 to 13

High - From 14 to 17



Ensure that the whole range is covered and that there are no gaps or overlapping - do not set values 1 to 6 and then 6 to 7, because 6 would then be available at two levels.

Add the risk level definitions to the tab:

1. Select a matrix and open the Risk Level Acceptability tab.
2. Click **New** at the bottom of the tab.
3. Give each entry a **Description**, add any **Notes** and lookup a **Colour** to associate the level with.
4. Enter the **From/To Value** range covered by the level.
5. **Save** the tab.

NOTE: The information in this tab can be changed at any time, even in an Issued version without creating a new draft.

4.1.7 Applying Risk Index Labels On The Matrix

Once your definitions are complete, a new matrix will be added to the Matrix tab.

The values from the Likelihood tab appear on the left, and the values from the Severity tab appear along the top of the matrix:

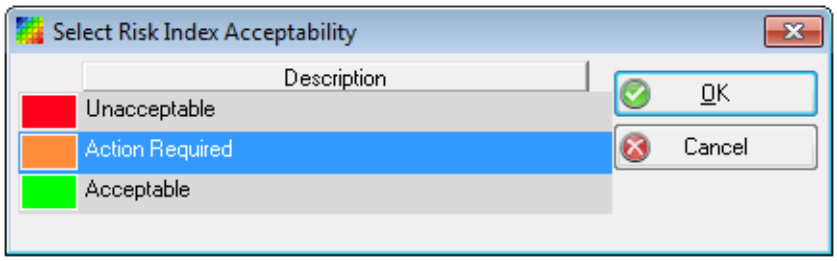
Likelihood of Harm	Severity of Harm			
	Negligible (1)	Marginal (2)	Critical (3)	Catastophic (4)
Improbable (1)	Acceptable	Acceptable	Acceptable	Acceptable
Remote (2)	Acceptable	Acceptable	Acceptable	Acceptable
Occasional (3)	Acceptable	Acceptable	Acceptable	Acceptable
Probable (4)	Acceptable	Acceptable	Acceptable	Acceptable
Frequent (5)	Acceptable	Acceptable	Acceptable	Acceptable

Now you manually assign the risk index labels to each intersection:

1. Double-click on a cell.

> **TIP**
>
> Hold the **Ctrl** key and click on multiple cells. Still holding the **Ctrl** key, double-click on one of the selected cells to set the same value on all of them at once.

2. Choose a Risk Index Acceptability value:



3. Click **OK** to apply it to the selected cell(s).
4. Continue until all the cells are assigned values and the matrix is complete:

Likelihood of Harm	Severity of Harm			
	Negligible (1)	Marginal (2)	Critical (3)	Catastophic (4)
Improbable (1)	Acceptable	Acceptable	Acceptable	Action Required
Remote (2)	Acceptable	Acceptable	Acceptable	Action Required
Occasional (3)	Acceptable	Acceptable	Action Required	Unacceptable
Probable (4)	Acceptable	Action Required	**Unacceptable**	Unacceptable
Frequent (5)	Acceptable	Action Required	Unacceptable	Unacceptable

5. **Save** the matrix.

4.1.8 Issuing A Risk Matrix

Issue a completed risk matrix to make it available for use with risk scenario assessments/types:

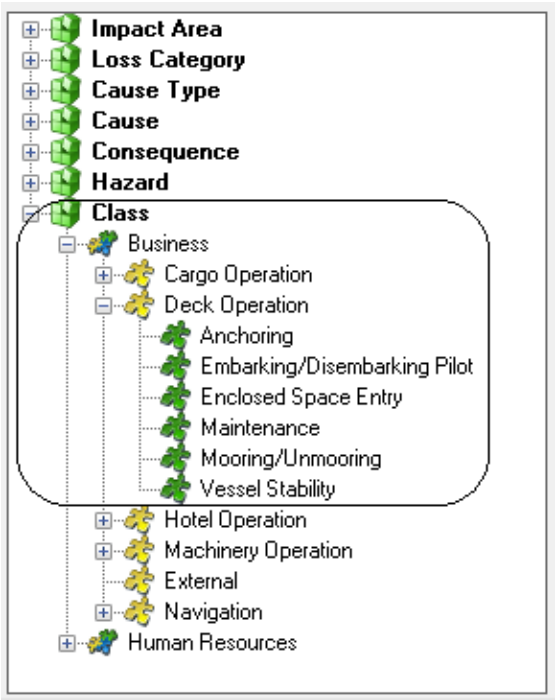
1. Select the completed matrix in the Risk Management Matrix window.
2. Go to **Options > Work Flow**.
3. You may have to approve the matrix first, depending on your work flow configuration.
4. **Issue** the matrix and click **OK**.

4.2 Risk Scenario Types

Scenario Types are potential risk inducing situations such as 'Mooring/Unmooring'.

By creating possible scenario types, you can pre-define and distribute 'generic' risk scenarios and risk control measurements in the office and then distribute them to the sites where they apply. On site, the scenario types can be used as they are, or changed to include more local factors.

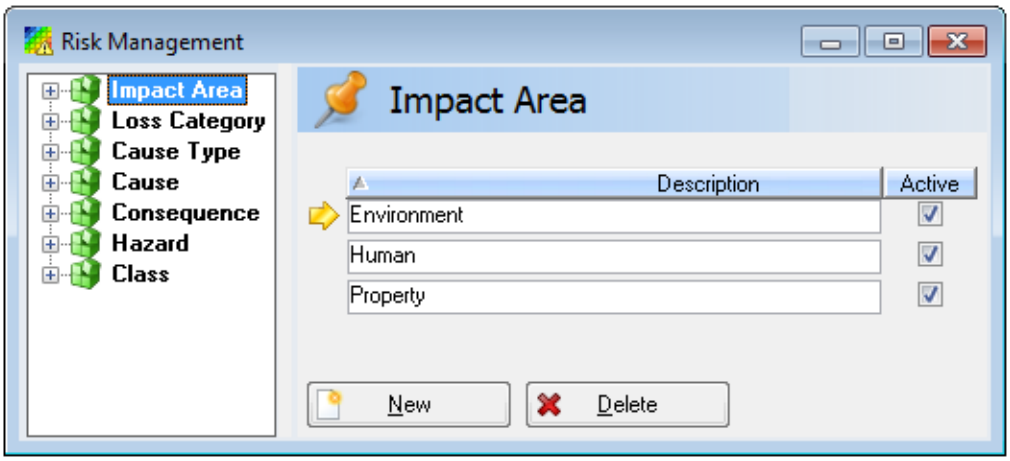
Risk scenario types can be grouped using the **Classes**, **Categories** and **Groups** already created in the Risk Management registers:



4.2.1 Risk Management Registers

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

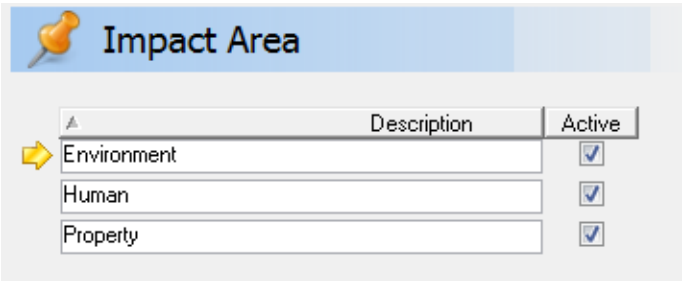
1. Go to **File > Open Register > Risk Management**:



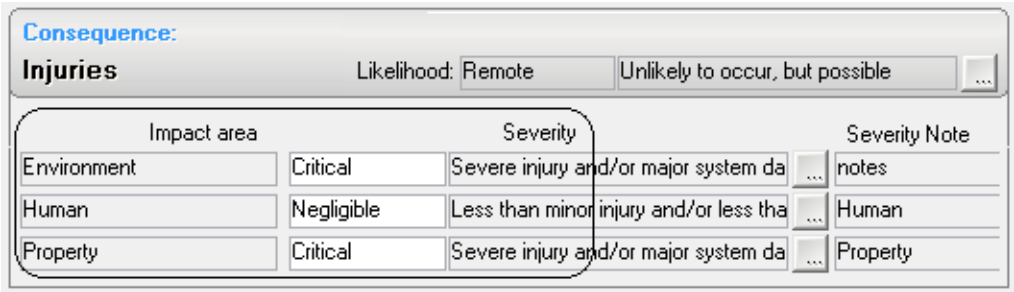
2. Add to any register by selecting it and clicking the **New** button at the bottom of the window.

4.2.1.1 Impact Area

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



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



4.2.1.2 Hazard

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

EXAMPLE

In some scenarios, you think the following hazard could occur:

Breaking Ropes and Wrong Handling

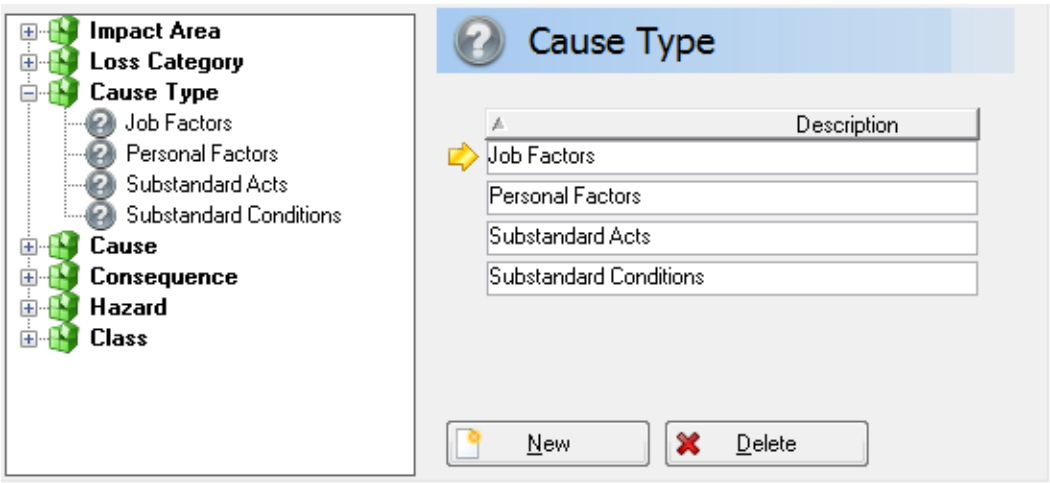
You define **Causes** for this hazard such as improper training, fatigue or worn out materials.

If this hazard does occur, it could result in **Consequences** like injuries or fatalities.

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

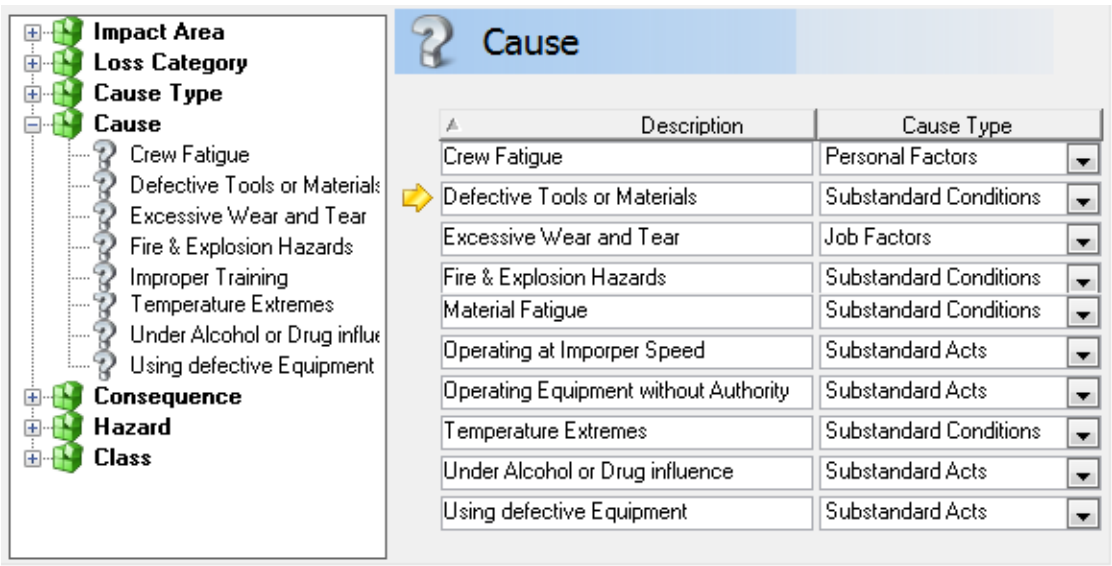
4.2.1.2.1 Cause Type

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



4.2.1.2.2 Cause

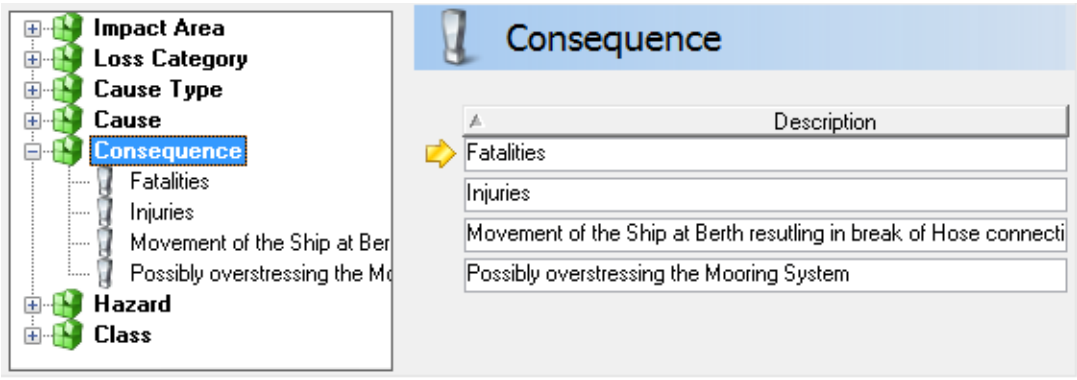
Select the Cause register in the hierarchy and create a list of causes of hazards.Then select a cause and assign a **Cause Type**:



4.2.1.2.3 Consequence

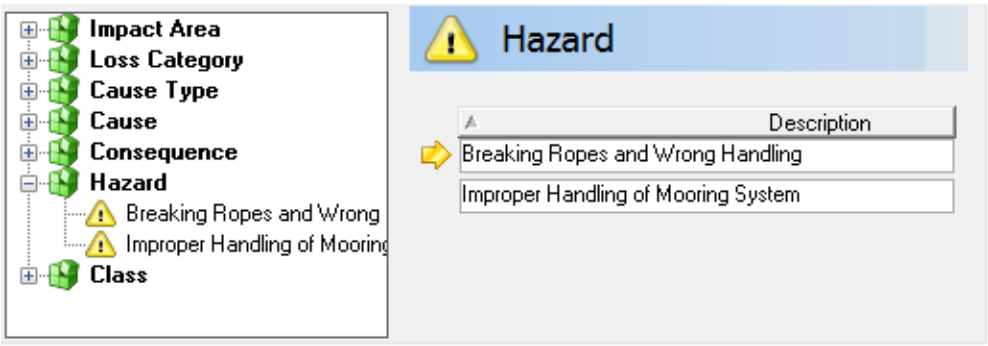
Select the **Consequence** register in the hierarchy and create a list of consequences which could

follow if a hazard occurs:

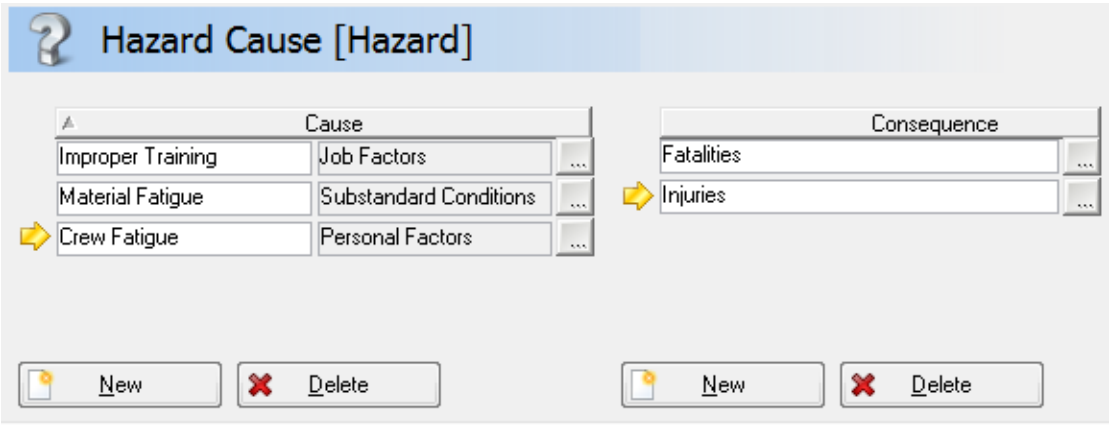


4.2.1.2.4 Hazards

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

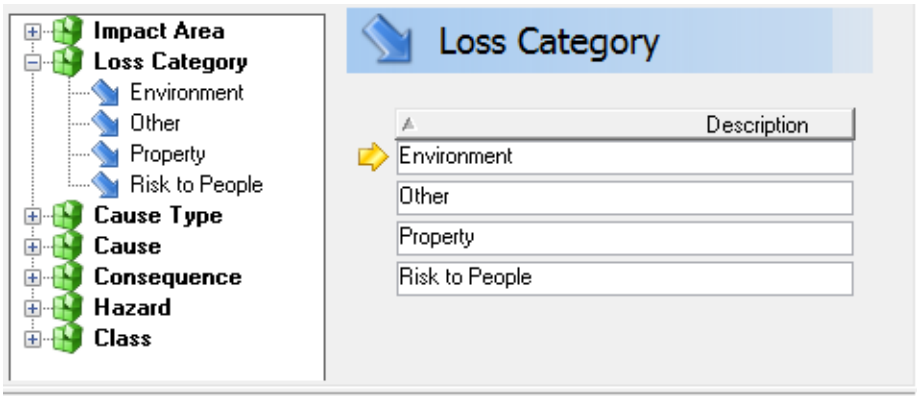


Select a hazard, and click **New** on the bottom left side of the tab to lookup a **Cause**. Click the **New** button on the bottom right side and lookup a **Consequence**. Add as many as you need:



4.2.1.3 Loss Category

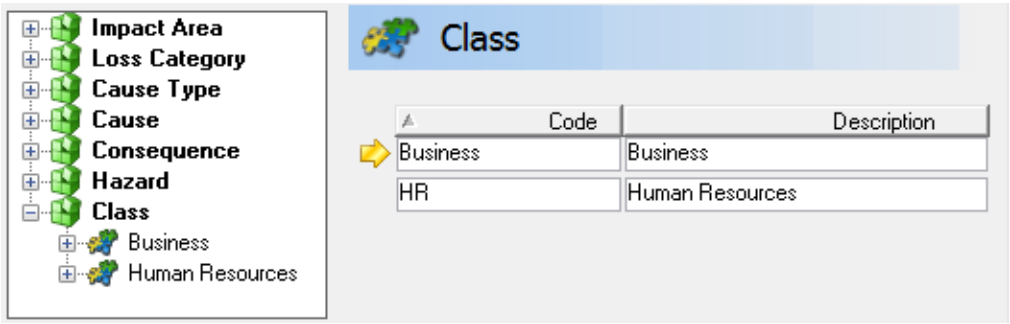
Select the **Loss Category** register in the hierarchy and create a list of categories which could be affected by the consequences of any hazard:



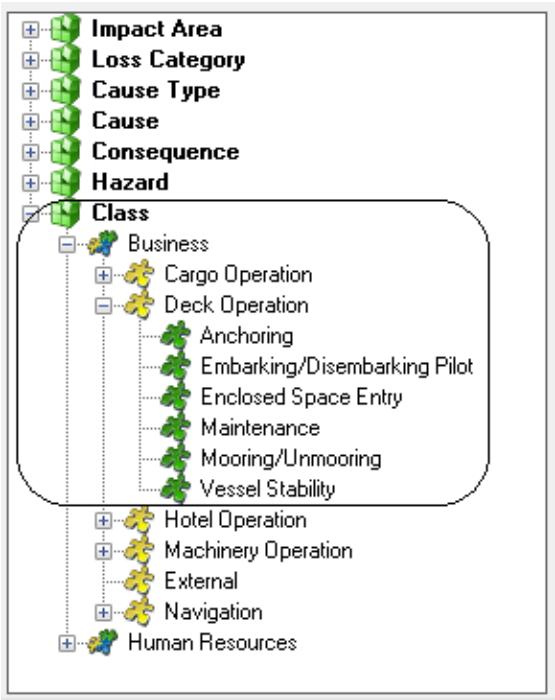
4.2.1.4 Class

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

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



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

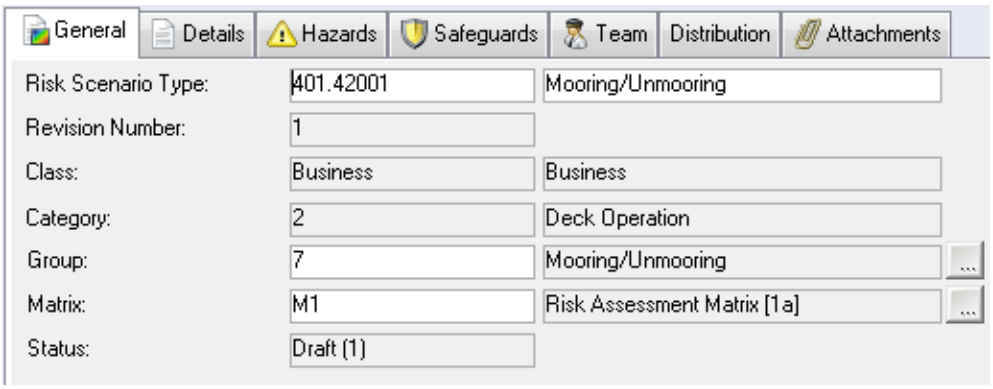


4.2.2 Creating A New Risk Scenario Type

To create a new scenario type:

1. Go to **Assessment > Risk Scenario Type**. Click **Create Entry** in the filter or **New** in the window.
2. Give the scenario type a name.
3. Lookup the risk **Group** the scenario type belongs to. This adds the **Class** and **Category** at the same time:

- **Group**- 'Mooring/Unmooring'. You get the **Category** 'Deck Operation' and the **Class** 'Business'.



4. Lookup a **Matrix** to assess the scenario type with.
5. Add the team members who devised the scenario type in the Team tab.
6. **Save** the scenario type.

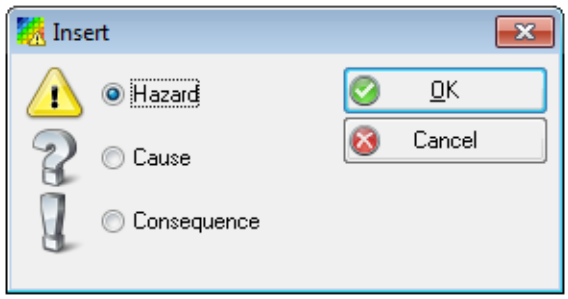
4.2.3 Identifying Hazards: Causes And Consequences

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

> **EXAMPLE**
>
> You have defined 'Mooring/Unmooring a vessel' as a risk scenario. During this operation, you think the following hazard could occur:
>
> Breaking Ropes and Wrong Handling
>
> Breaking ropes and wrong handling might be caused by improper training, fatigue or worn out materials. If this hazard does occur, it could result in consequences like injuries or fatalities.

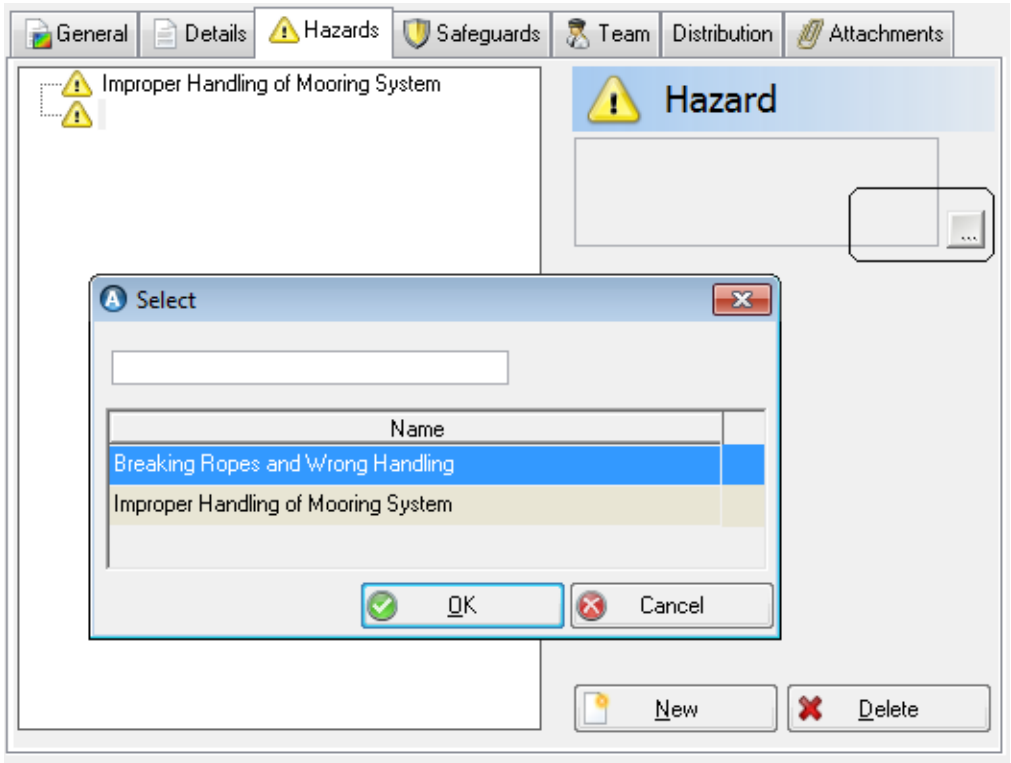
To add a new hazard:

1. Open the Scenario Type window and select a scenario type.
2. Open the Hazards tab.
3. Click the **New** button in the tab. If it is the first entry:

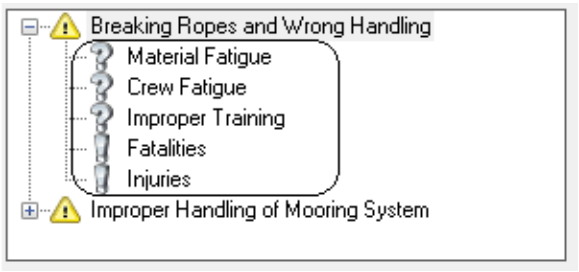


Click **Hazard** and **OK**.

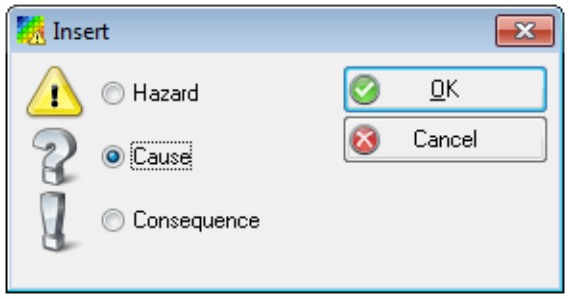
4. Lookup a **Hazard**:



5. Hazards might come with causes and consequences defined:

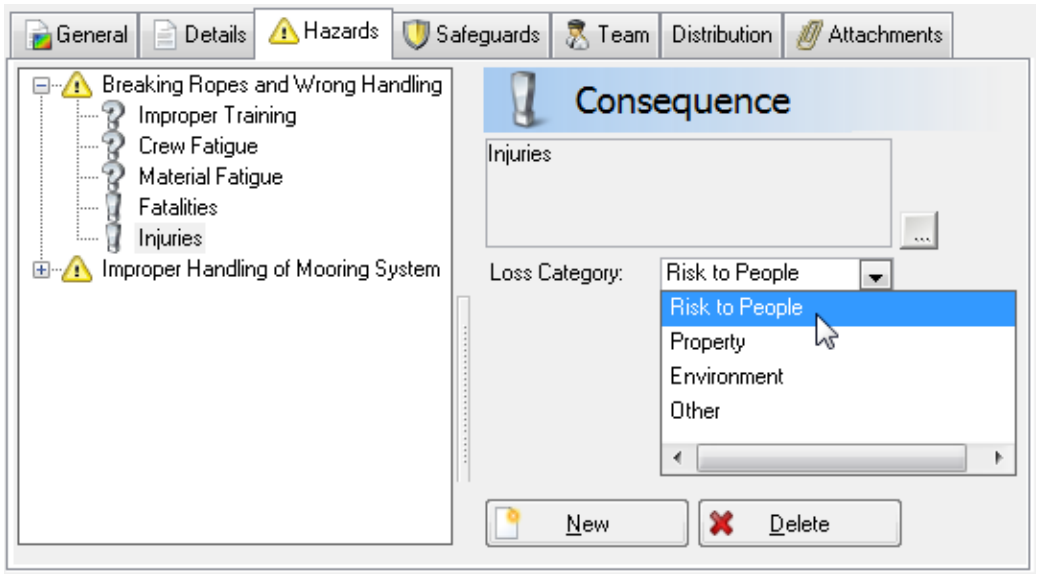


6. To add more causes and consequences select a hazard and click **New** in the bottom of the tab. Choose **Cause** or **Consequence** and click **OK**:



Lookup the cause or consequence. To remove any entry select it and click **Delete**.

7. Select a consequence in the hierarchy.
8. Select a **Loss Category** for the consequence:



9. **Save** the tab.

4.2.4 Identifying Safeguards

Safeguards are risk control measurements which should be implemented to prevent a particular risk scenario from actually occurring. Create a list of such safeguards for each scenario type:

1. Open the Scenario Type window and select a scenario type. Open the Safeguards tab.
2. Click **New** inside the tab. Give the new entry a name and detail any information about it in the **Notes** section.
3. **Save**, and continue to add all possible safety measures.
4. Select one and open the Procedures tab.
5. Click **New** in the tab and lookup a document from the list of available procedures. Add as many as apply.
6. **Save** the safeguards list.

4.2.5 Issuing A Risk Scenario Type

Before scenario types can go into use and scenarios created for assessment, the latest version needs to be issued[1].

1. Select a scenario type.
2. Go to **Options > Work Flow**.
3. Select the publishing or issuing action according to your work flow configuration, in the Change Work Flow Status dialog. You may also need to approve it first.
4. The scenario type's status changes. You can create a new draft of the same type when one is needed.
5. **Save** the changes.

4.2.5.1 Creating New Revisions

Once a scenario type has been issued no modifications can be made to it- a new draft is required:

1. Create a new draft revision: select the current revision and click **New**.
2. Choose to create a new revision, rather than a new type.
3. Make the changes.
4. Publish the new draft, rendering the previous revision obsolete. Two drafts of the same scenario type cannot exist at the same time.

If necessary you can cancel a published or draft revision using the work flow. The cancelled revision will still appear in the list but no longer be usable.

Assessments already in progress and linked to the previous revision of the scenario type, will continue to use the type which was valid when the assessment was created. New assessments created using the scenario type will refer to the latest issued revision.

NOTE: The link established between a Component/Type Job and a Scenario/Type is actually a link to a scenario/type revision. When a revision is eventually filed, the link is no longer valid and this could cause a non-conformity.

Upon issuing a new revision of either a risk scenario or a scenario type, AMOS will check for items linked to the previous revision and if any are found:

- the existing link will be replaced with a link to the new revision's ID, and
- the linked records will be updated automatically, with no notification to the user.

4.2.6 Distributing A Scenario Type

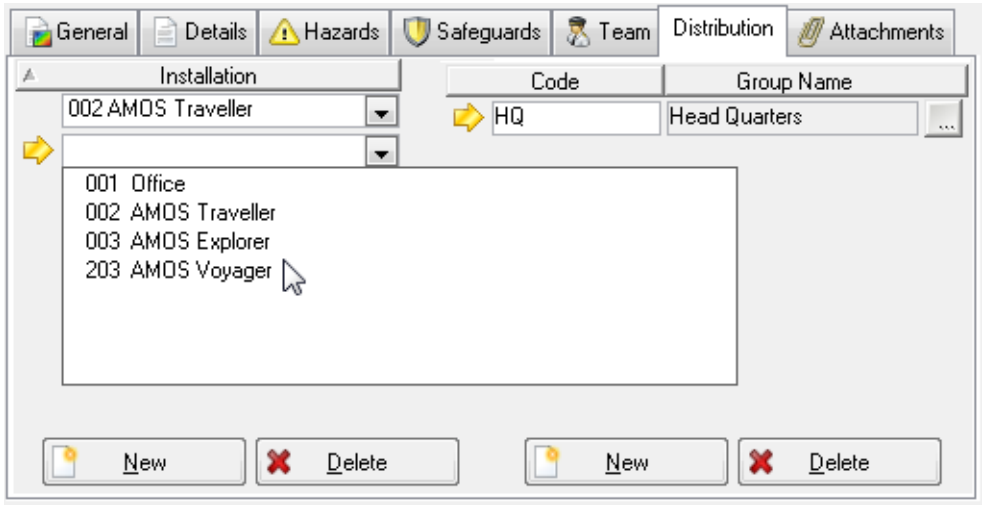
Certain scenario types and risk control measurements might apply to one installation group like a particular class of vessel, but not to another. When you create a scenario type, distribute it to the installations where it applies. Users at each site will only be able to select from and evaluate the types which have been distributed to their installation.

To distribute a scenario type:

1. Open the Scenario Type window and select a type in the list.
2. Open the Distribution tab.

[1] Available work flow actions and statuses depend on your own work flow configurations. Those listed here are examples using the pre-configured work flow and so may differ from your own.

3. Click either **New** button to add one or more individual installations, or groups:



4. **Save** the window.

Distributing scenario types does not create scenarios automatically at installations - it simply makes the types available for selection when a user creates a new scenario.

4.3 Linking Risk Assessments To Maintenance Work

Risk scenarios can be linked to maintenance work and carried out in relation to work orders. To link defined scenario/types to your maintenance program:

1. Activate risk management functionality on component/type jobs.

   For jobs where risk management is activated, link a scenario/type.

   See section 4.3.1.

2. New work orders will be generated with an assessment for the scenario/type. See section 4.3.2.

   You can also link scenario/types and assessments directly to existing work orders, and to requisitioned work. See section 4.3.2.1.

3. Activate the assessment linked to a work order, and carry out the evaluation as usual before reporting on the work order.

   See section 4.4.2 about activating an assessment. See section 4.4.3 about evaluating an assessment.

4.3.1 Activating Risk Management On Component/Type Jobs

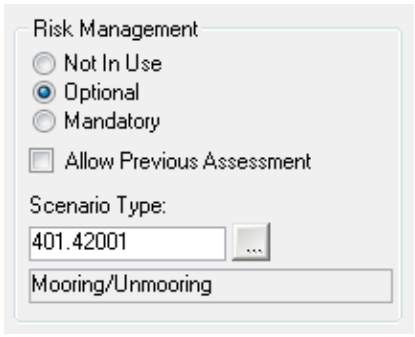
You can activate risk management on component type jobs and link a scenario type. The settings will be inherited onto component jobs. Component jobs can also be linked to existing scenario/types.

To activate risk management on a component job:

1. Open the Component Types window and select a component type. Open the Jobs tab.

   Click **View** to open the Component Type Jobs window.

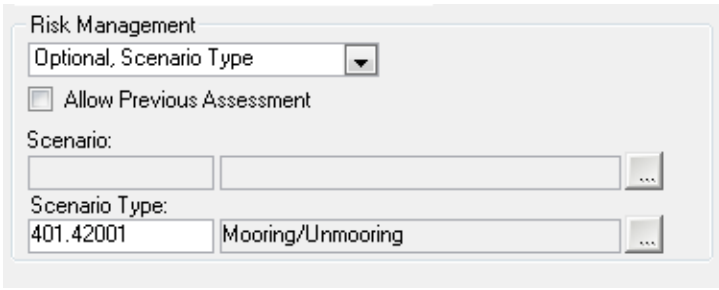
2. Select a job.
3. By default **Risk Management** is 'Not in Use'. Set it to 'Optional' or 'Mandatory'.
4. Lookup a **Scenario Type** if a suitable one exists:



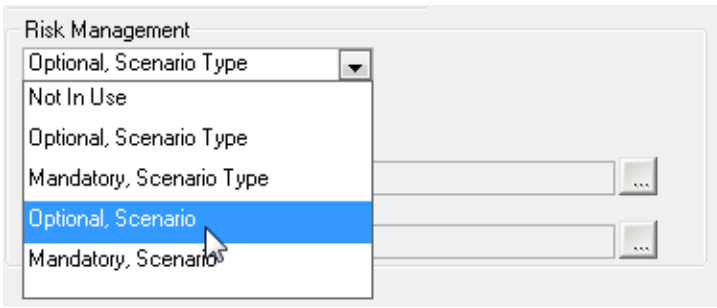
If you do not look up a scenario type a user can do so on the component job itself, or create a local scenario.

5. **Save** the job. AMOS will ask if you want to reflect the changes on components of the type.

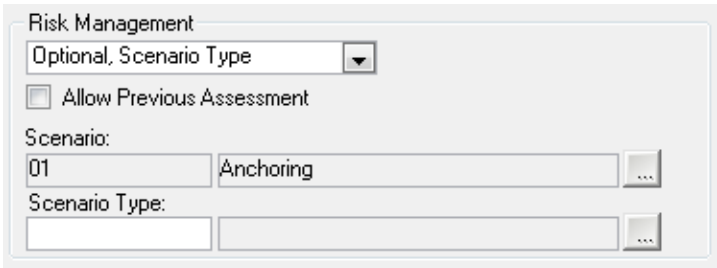
If you chose to update the relevant components with the risk management information, when you open the Component Job window for the same job, you will see the settings there:



You can change the setting on component job level:



You can also add a scenario type or change the specified one, or, lookup an existing scenario:



- When risk management is mandatory on a component job and a scenario/type is applied to it, a new scenario assessment will be linked automatically to the work order for this job.
- If risk management is optional on the component job, no scenario assessment will be linked automatically to the work order - the end user will need to create one.

NOTE: The link established between a Component/Type Job and a Scenario/Type is actually a link to a scenario/type revision. When a revision is eventually filed, the link is no longer valid and this could cause a non-conformity.

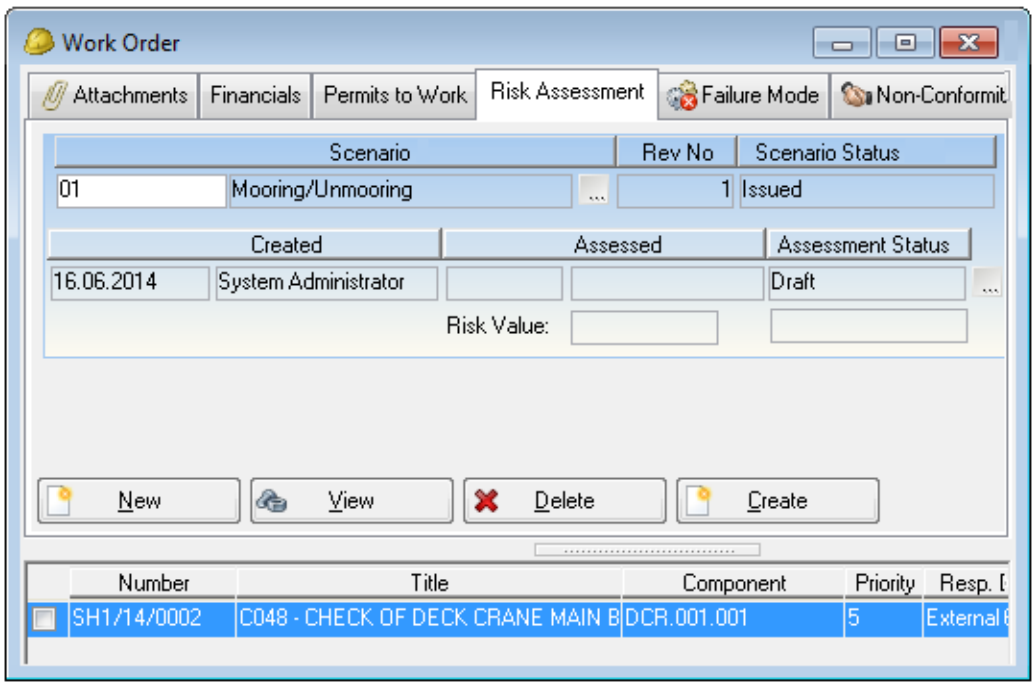
Upon issuing a new revision of either a risk scenario or a scenario type, AMOS will check for items linked to the previous revision and if any are found:

- the existing link will be replaced with a link to the new revision's ID, and
- the linked records will be updated automatically, with no notification to the user.

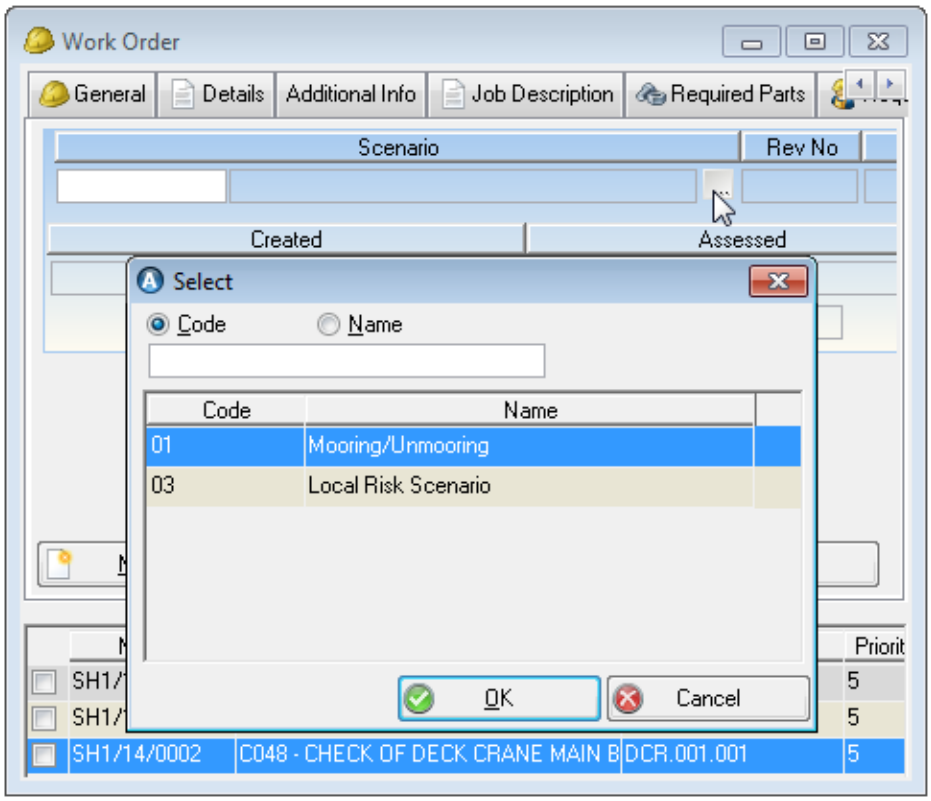
4.3.2 Work Orders And Risk Assessments

Depending on the risk management settings on a component job, new work orders for the job might be generated with a risk scenario assessment already listed in the Risk Assessment tab:

- When risk management is mandatory on a component job and a scenario/type is applied to it, a new scenario assessment will be linked automatically to the work order for this job.
- If risk management is optional on the component job, no scenario assessment will be linked automatically to the work order - the end user will be need to create one.



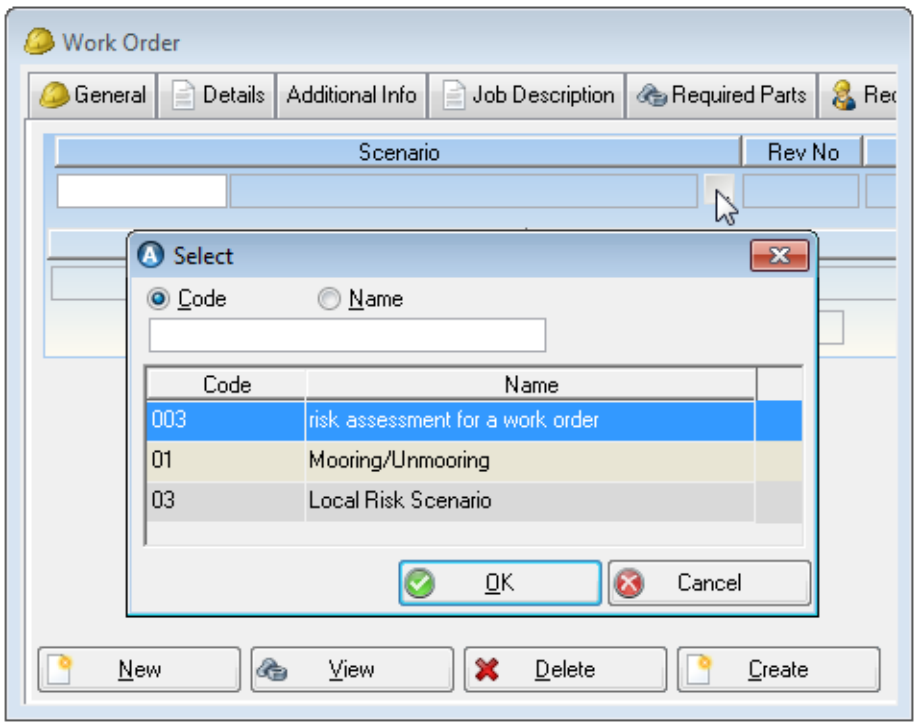
To register another *existing* risk scenario assessment against the same work order, click the **New** button and look one up:



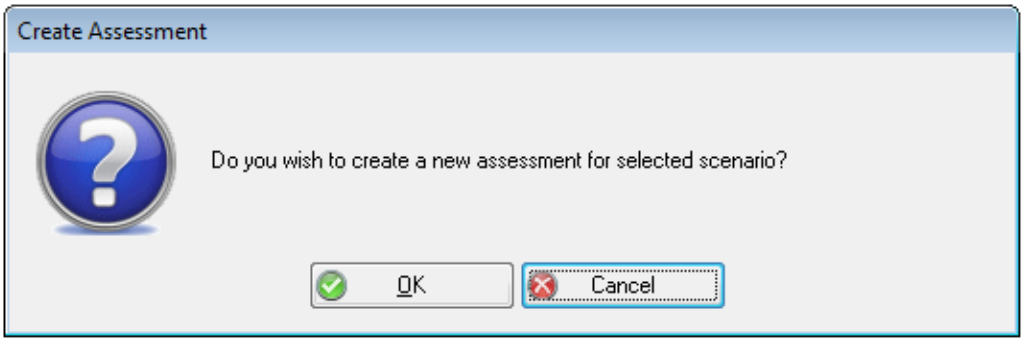
This refers the work order to the existing scenario assessment - it does not actually create a new one.

To *create* a new assessment for a scenario on a work order:

1. Click **New**.
2. Lookup a scenario for which no assessments currently exist:



3. Click **OK** to add it to the tab.
4. Click the **Create** button:



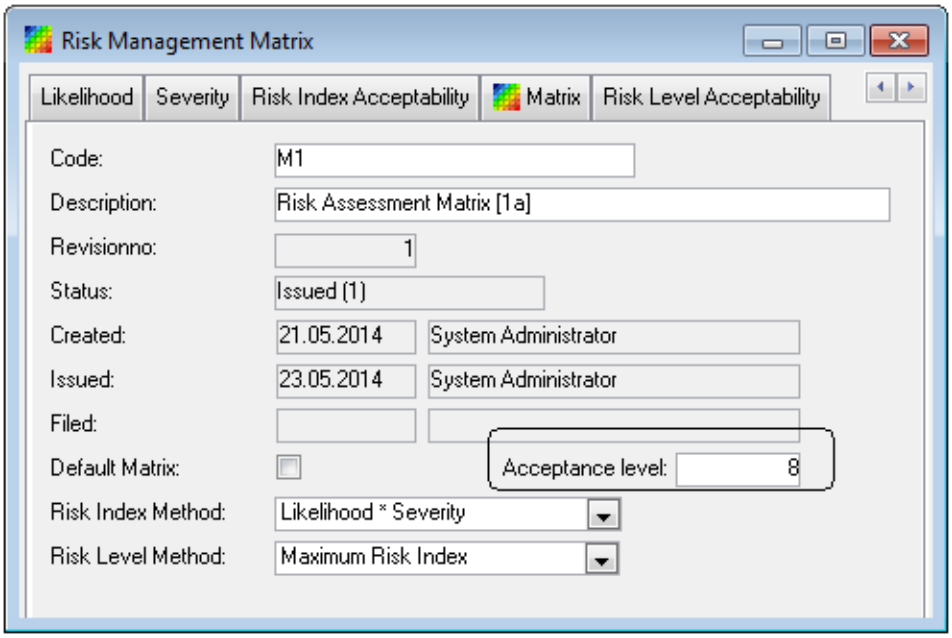
Click **OK** to create the new assessment.

5. The Risk Management Assessment window opens. Create and save a local scenario and assessment for evaluation. See section 4.4.4.

Work orders linked to a scenario will appear in the Assessed tab on the risk assessment evaluation.

Mandatory Assessment Evaluations

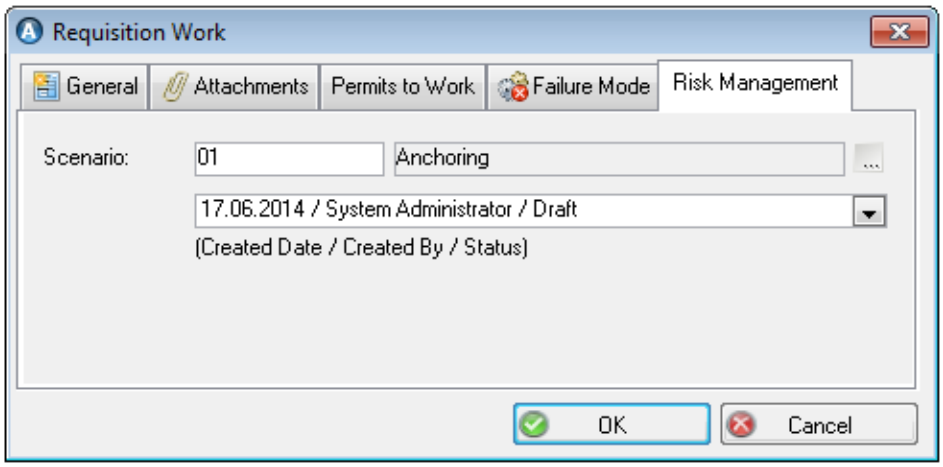
To prevent a user from reporting a work order as complete until the linked assessment has been satisfactorily evaluated, the QA Manager can apply an **Acceptance Level** on the Risk Matrix configuration:



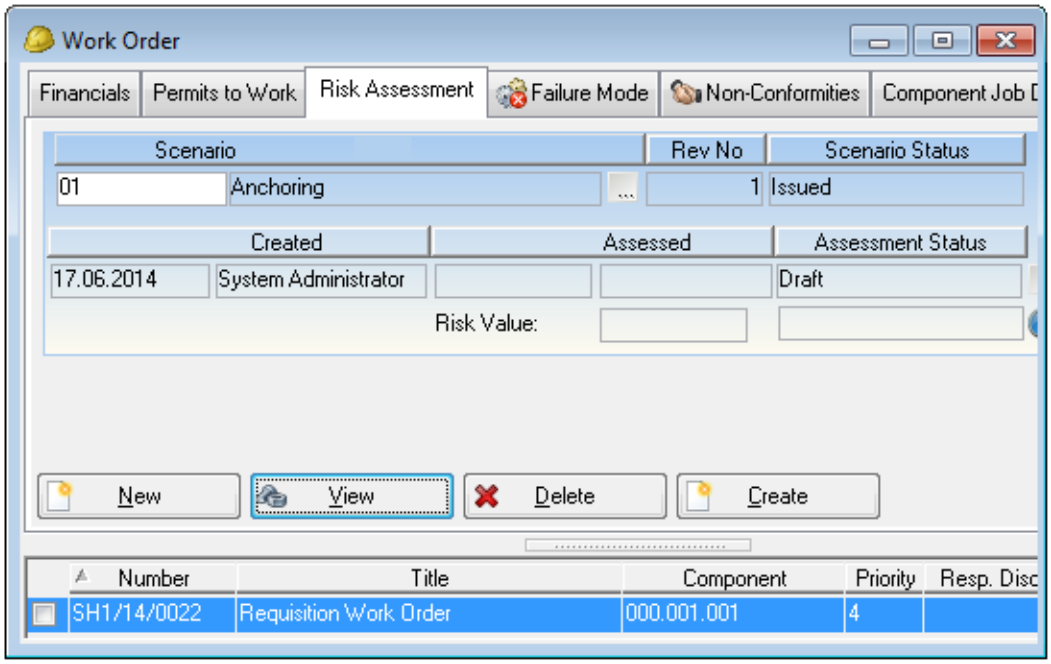
If the assessed risk value is above the limit set on the matrix the scenario assessment is based on, users will be prevented from reporting on the work order.

4.3.2.1 Requisitioning Work With A Risk Scenario Attached

Link an existing scenario to a requisition work order from the Risk Management tab on the Requisition Work window:



When a work order is generated, a risk scenario assessment will be created with it for evaluation.



Click **View** to open, activate and evaluate the assessment.

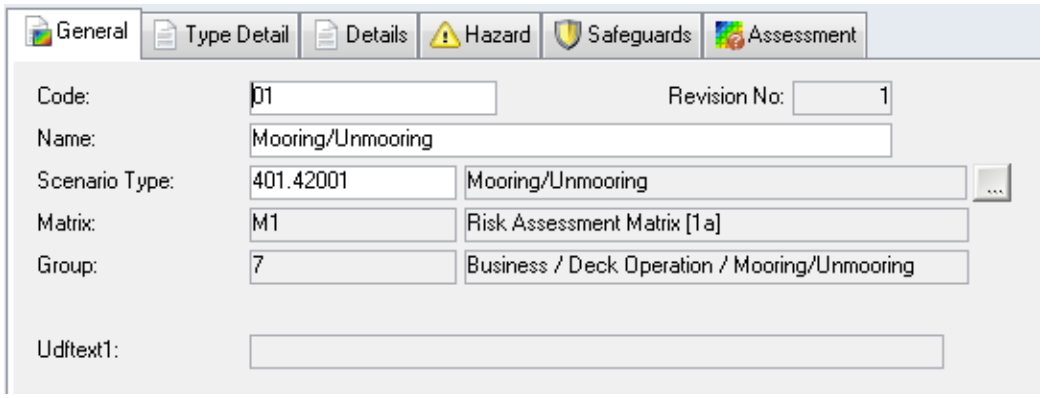
4.4 Creating A Risk Scenario From A Scenario Type

Assessing a scenario onboard is to evaluate the likelihood of the defined hazards actually occurring on the vessel when the safeguards are in place, and the severity of the resulting consequences.

Scenario types are predefined and distributed to installations where they apply. The information in them can be changed to reflect local circumstances.

To create a new scenario from a type:

1. Go to **Assessment > Risk Scenario**. Click **Create Entry** in the filter or **New** in the window.
2. Give the new scenario a **Code** and a **Name**.
3. Lookup a **Scenario Type**:



Matrix and **Group** come with the type selection.

> **TIP**
>
> The **Scenario Type** lookup lists all published scenario types distributed to your installation. Filter it first by using the **Group** lookup to find a scenario type group. This narrows the list of available types to only those which belong to the selected group.

4. **Save** the window.

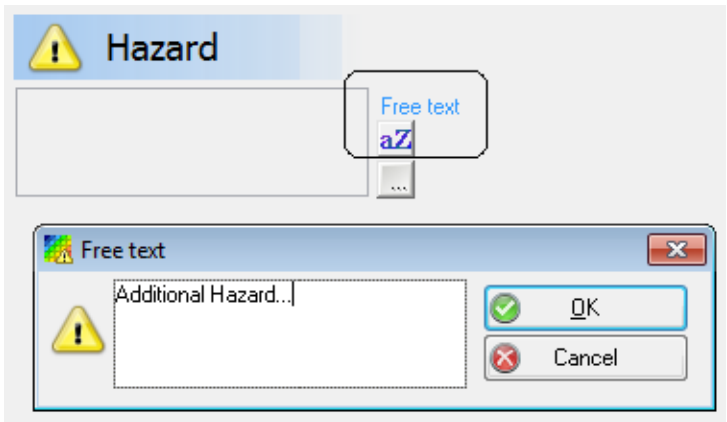
NOTE: You can also create new 'local' scenarios from scratch - that is, not based on a type at all. See for more information. See section 4.4.4.

4.4.1 Adding Hazards And Safeguards To A Scenario

All hazards, notes and safeguards come with the type: add more or remove any which do not apply, as needed:

1. Open the Hazard/Safeguards tab.
2. Click the **New** button. Add hazards, causes and/or consequences or safeguards the same way as on a scenario type.

   You can also click an additional lookup to enter a free-text hazard or consequence not drawn from the registers:



3. Click **Save**.

This will not change the central scenario type.

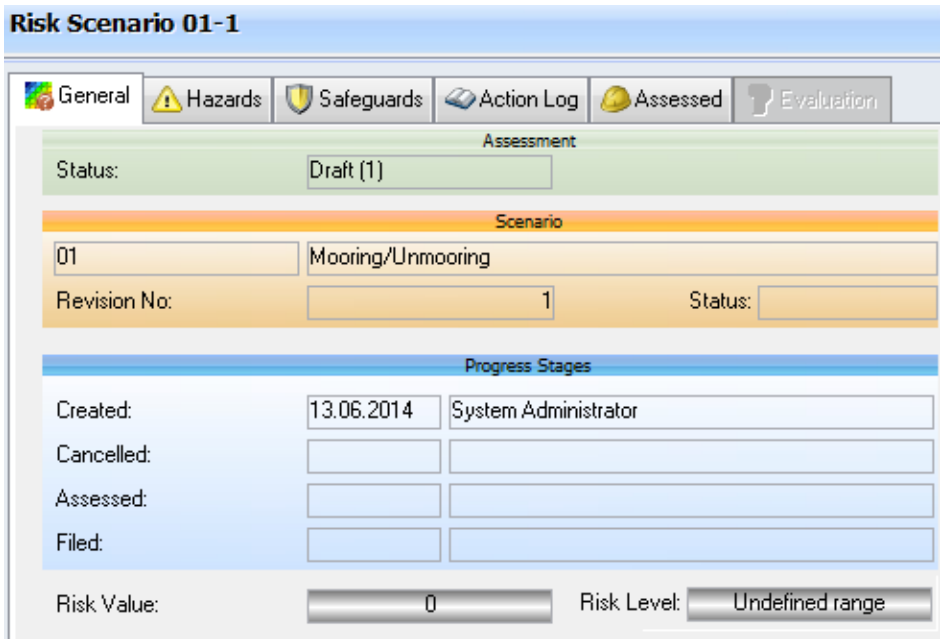
4.4.2 Scenario Assessment Revisions

You can perform as many assessments as required on the same scenario: as the risk goes down due to newly implemented and successful safeguards you reassess the scenario and lower the risk evaluation. All assessments revisions are listed in the Assessments tab.

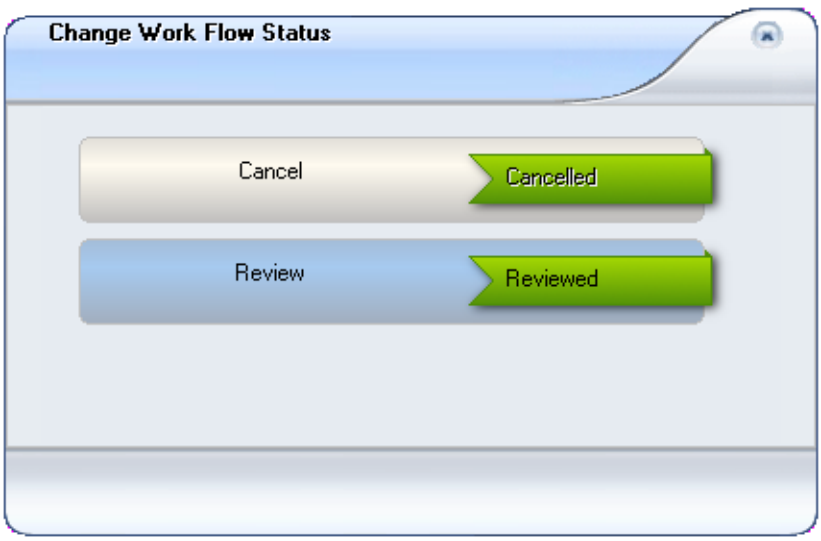
To perform an assessment:

1. Open the Risk Management Scenario window: **Assessment > Risk Scenario**.
2. Select a scenario. According to your work flow[1], approve and issue the scenario to activate it.
3. Open the Assessment tab and click **New**.

   This remote opens the Risk Scenario window:



4. Update the scenario's work flow status to allow for assessing: go to **Options > Work Flow**:



[1] Work flow configurations and the actions and statuses they include may vary.

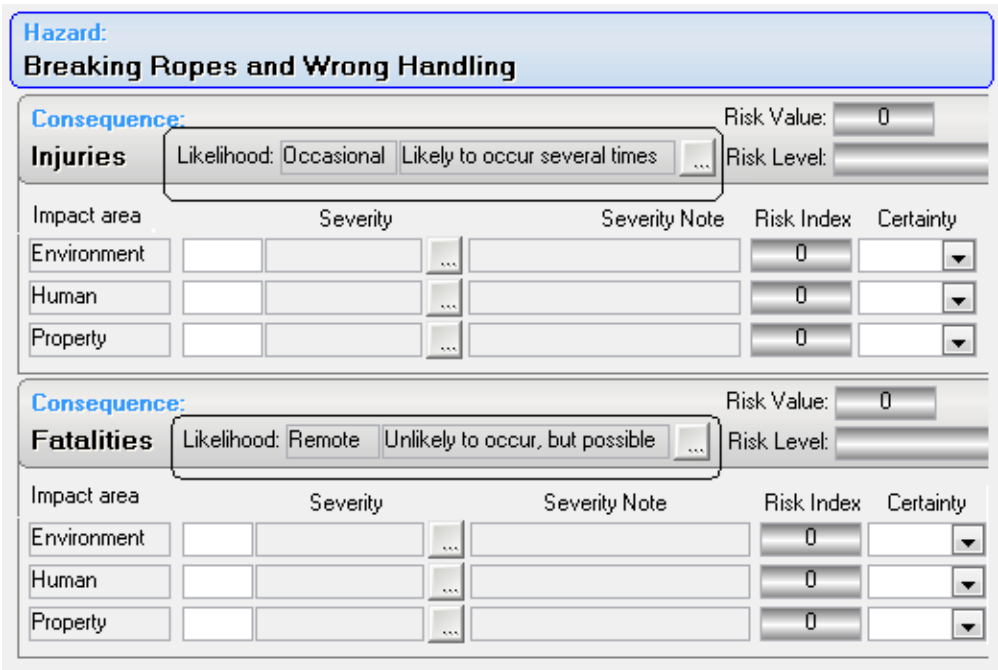
Choose the reviewing action[1] . Click **OK** to return to the main window.

5. **Save** the window.

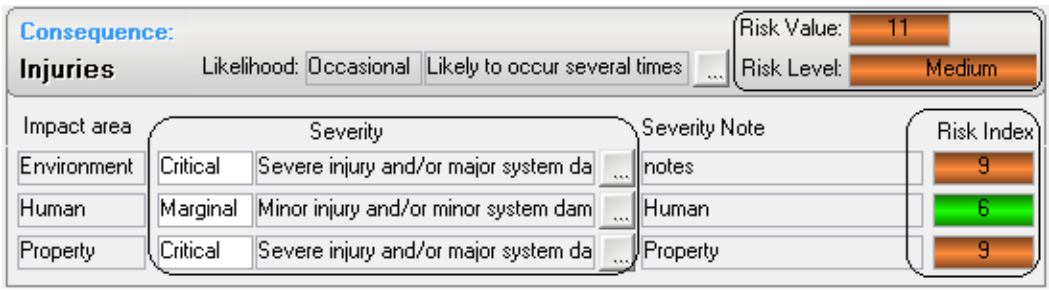
4.4.3 Evaluating A Risk Scenario

To evaluate an assessment revision:

1. Go to **Assessment > Risk Scenario**. Select a scenario and open the Assessment tab.
2. Select an evaluation in the list, and click **View**. This remote-opens the Risk Scenario assessment.
3. Open the Evaluation tab.
4. The hazards defined on the scenario/type appear in this tab. Each hazard contains a list of consequences. Select the likelihood of each consequence occurring:



5. The impact areas appear below each consequence. Select the **Severity** of the consequence's impact on each area:



- AMOS calculates the **Risk Index** on each impact area and then determines the **Risk Value** and **Level** on each consequence. See section 4.1.2 for more information about how AMOS calculates these values.
- Use the **Certainty** drop-down to indicate your confidence in the accuracy of this risk

[1]Available work flow actions and statuses depend on your own work flow configurations.

assessment.

6. **Save** your evaluation.

4.4.3.1 Completing The Assessment

Go to **Options > Work Flow** to change the status when your evaluation is complete.

If the risk level is later determined to be too high or too low or in any way needs adjustment, create a new revision and evaluate the scenario again.

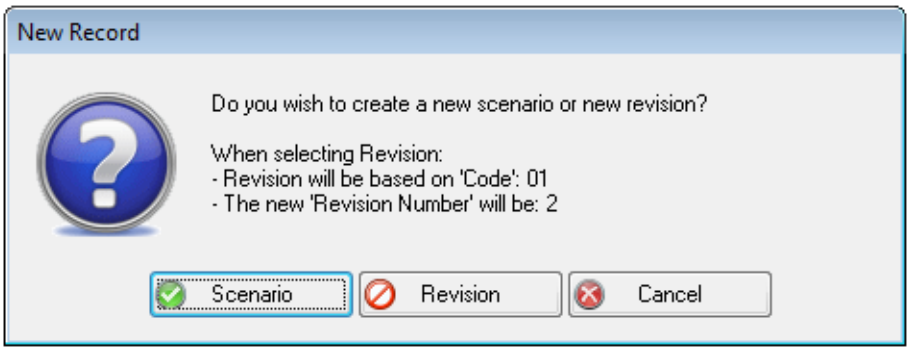
4.4.4 Creating 'Local' Scenarios

On-site users can modify existing scenarios created from type, and they can also create entirely new ones 'locally' without using a scenario type.

- Centrally-created scenario types do not always cover all potential scenarios because the operating environment for each vessel varies.
- A new scenario could arise at any time at an installation which is not already covered in the available scenario types.

To create a new local scenario:

1. Go to **Assessment > Risk Scenario**.
2. Click **New** in the window. Choose to create a new **Scenario**:



3. Enter a **Code** and **Name** for the new scenario.
4. Lookup a **Matrix** to apply to the assessment.
5. **Save** the entry.
6. Go to **Options > Work Flow** to approve and issue[1] the scenario.
7. Open the Assessment tab and click **New**. This remote opens the Risk Scenario window.
8. Activate the revision using the work flow.
9. The Hazards and Safeguards tabs will be empty.

   Add hazards and safeguards as when creating a scenario type. See section 4.2.3 and section 4.2.4 for more information.
10. **Save** the scenario. Evaluate it as usual. See section 4.4.3.

[1]Work flow configurations and the actions and statuses they include may vary.

CHAPTER 5 Self Assessment And Statistics

The AMOS Self Assessment module[1] is a tool for organising Key Performance Indicators (KPIs) for assessment, to measure and evaluate your company for compliance with Tanker Management Self Assessment (TMSA) requirements and standards. Performing regular self assessments ensures continual improvement within your organisation. A minimum compliance to all elements of the standard establishes the baseline from which to improve.

You should perform self assessments to:

- review the existing systems and practices within your organisation and evaluate these against industry standards
- record performance and compare progress
- provide documented evidence in case of audits

There are three main processes involved in using the AMOS Self Assessment module:

1. **Define and Issue a Self Assessment Configuration**. Set up the elements, sub-elements and KPIs which users will perform the assessments against. See section 5.1.
2. **Perform an Assessment**. Performs periodic self assessments, evaluating each KPI according to the present stage. Compare the new assessment against previous results to evaluate progress. See section 5.2.
3. **Analyse and Review the Data**. Assessment data and calculated scores can be reviewed in the Self Assessment Statistics window. See section 5.3.

5.1 Self Assessment Configurations

Self Assessment Configurations are lists of assessment criteria. They are divided into categories called **Elements**and **Sub-Elements** .**Key Performance Indicators (KPIs)**sharing similar concepts are grouped into the sub-elements. Each combination of elements, sub-elements and KPIs forms a revision of the configuration, against which users will perform the actual self assessments, by scoring the KPIs and calculating the results.

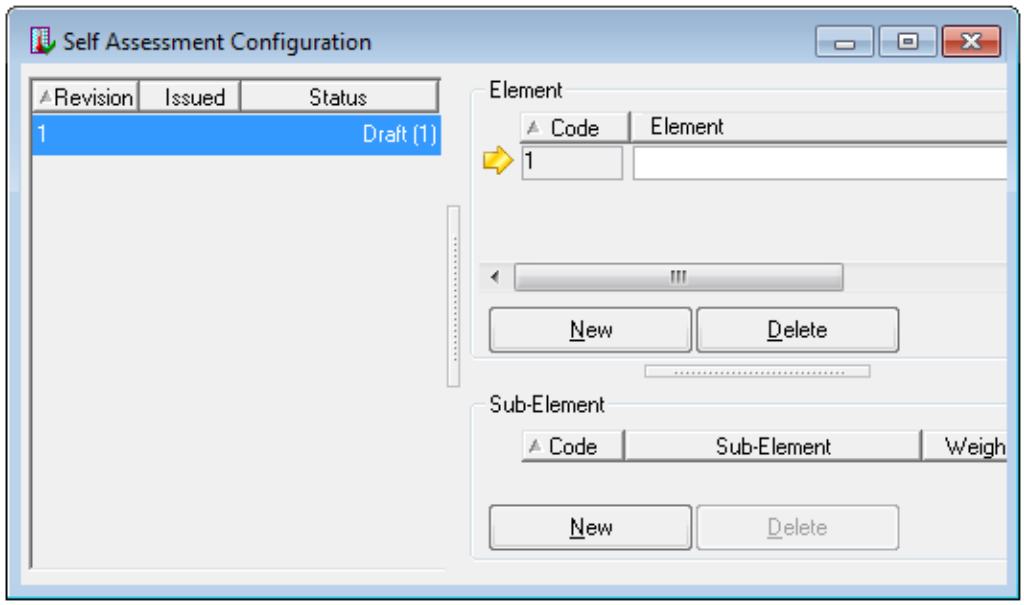
You can create a new configuration revision or change an existing one whenever it is necessary.

[1]Self Assessment is a separate module and as such requires its own license key to activate and use it.

NOTE: Self assessment configurations and the assessments themselves are work flow controlled: defined work flows are necessary to set up and use self assessments. The statuses in the Self Assessment Statistics filter are hardcoded to 'Active' and 'Obsolete' and so we recommend incorporating these terms as the user defined statuses when defining the 'SA Configuration' and 'Self Assessment' work flows.

To create the first self assessment configuration revision:

1. Go to **Tools > Configuration > Self Assessment**. Click **Create Entry** in the filter:



2. Create a list of elements. See section 5.1.1.
3. Create a list of sub-elements for each element. See section 5.1.2.
4. Define KPIs for each sub-element. See section 5.1.3.
5. When the configuration is complete, activate it using the work flow. See section 5.1.4.
6. The configuration revision will become available in the Self Assessment window the next time a user performs a self assessment. See section 5.2 about performing assessments.

Later, when you revise a self assessment configuration(s), you can copy all the information from a previous one by selecting **Options > Copy Revision**.

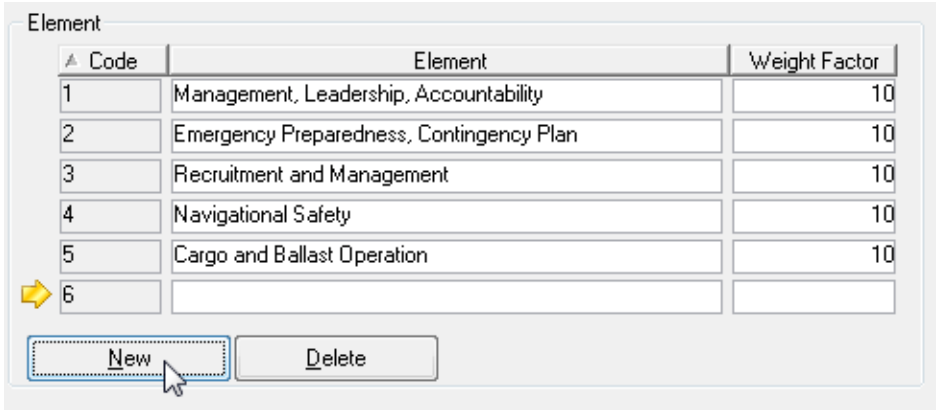
5.1.1 Adding A New Self Assessment Element

Each self assessment 'element' is like a category relating to a particular aspect of company operation, such as crew management or emergency procedures.

> **EXAMPLE**
>
> Two elements in the TMSA class include 'Management, Leadership and Accountability' and 'Emergency Preparedness and Contingency Planning'.

To add a new element:

1. Select a configuration revision on the left side of the window.
2. Click **New** in the 'Element' section to get a blank line:

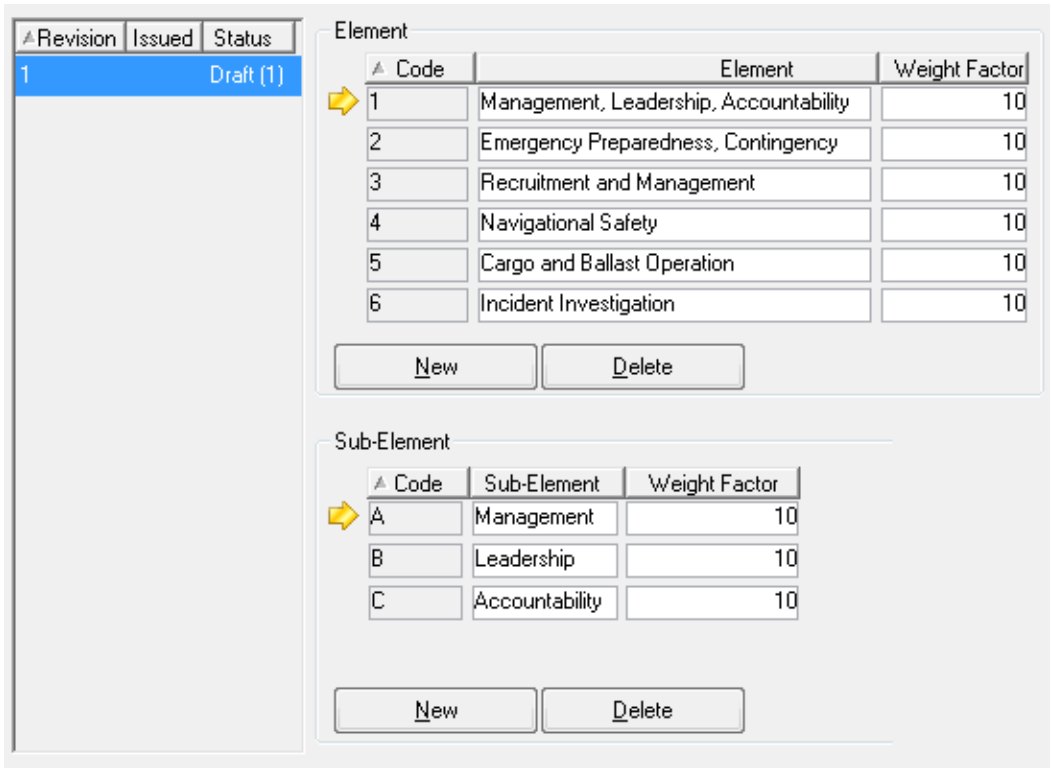


3. Enter a name and a **Weight Factor**: a percentage of value the element has in comparison to the others.
4. Add as many elements as needed.
5. **Save** the list.

5.1.2 Adding A New Sub Element

Further categorise the self assessment configuration with sub-elements:

1. Select a configuration revision on the left side of the window.
2. Select an element.
3. Click **New** in the 'Sub-Element' section to get a blank line:



4. Enter a name and a **Weight Factor**: a percentage of value the sub-element has in comparison to the others.
5. Add as many sub-elements to the selected element as required.

6. Select the next element and add a list of sub-elements to it, and so on.
7. **Save** the list.

> **TIP**
>
> The coding sequence of the sub-elements within an element can either start with A on the first sub-element and B, C, etc. to follow; or, start with no code on the first sub-element and A, B, C etc. to follow after that. The coding sequence in use is determined by the setting of the system parameter 'Sub Element Start Code'.

5.1.3 Adding A New KPI

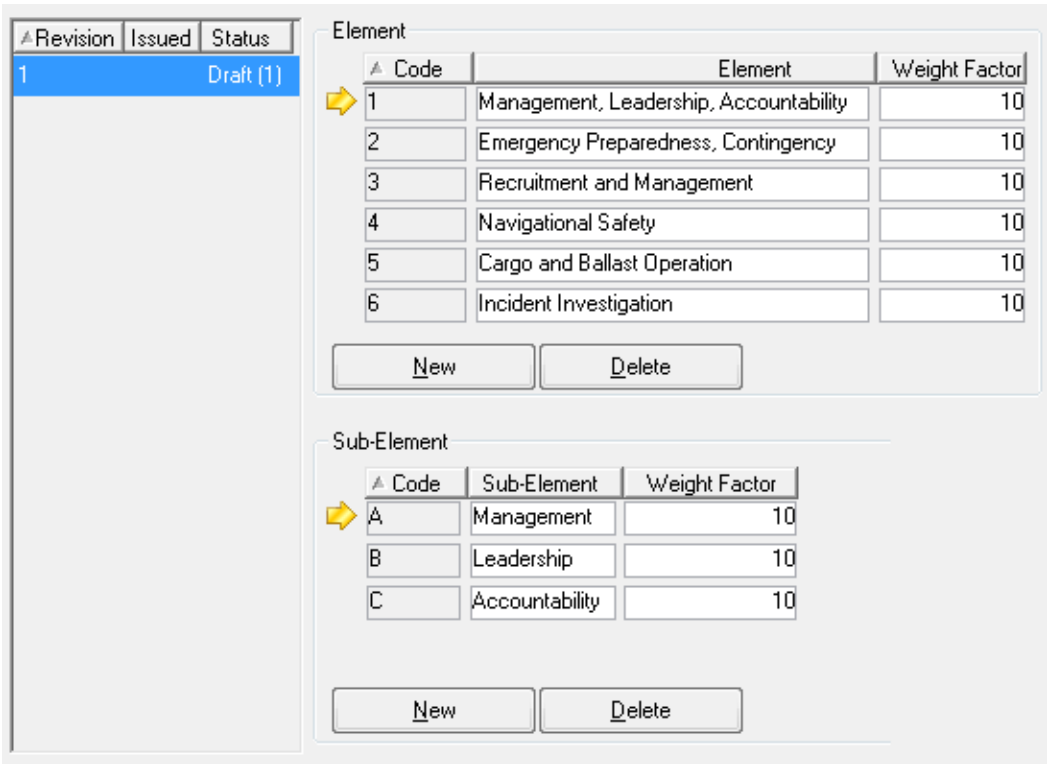
Key Performance Indicators (KPIs) are brief descriptions of the minimal expectations for each element.

> **EXAMPLE**
>
> *'Management commitment is clearly defined in documentation that includes mission statements, policies and procedures.'*
>
> and
>
> *'All company personnel can describe what safety and environmental excellence means in practice.'*

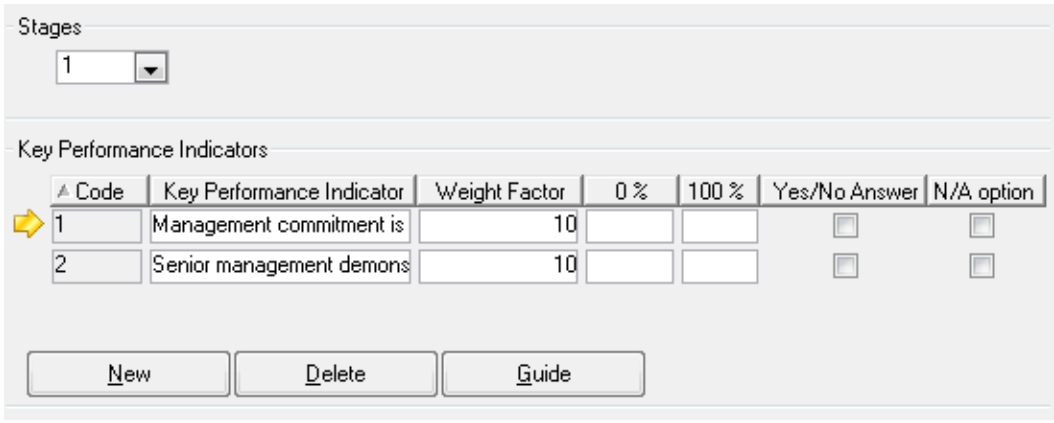
KPIs sharing similar concepts are grouped into the sub-elements. Keep in mind that there are four **stages** in self assessment. While the elements and sub-elements for each stage are the same, the KPIs you enter at each stage should differ according to what is acceptable at that stage.

To add a new KPI:

1. Select a configuration revision on the left side of the window.
2. Select an element and then a sub-element:



3. Select a **Stage**[1].
4. Click **New** in the 'Key Performance Indicators' section to get a blank line.
5. Enter the KPI description and a **Weight Factor**- a percentage of value the KPI has in comparison to the others:



There are different ways users can provide answers to KPIs during the self assessment process: these options are defined on the configuration. You can also provide guidelines to the end user at this point. See section 5.1.3.1 to section 5.1.3 below.

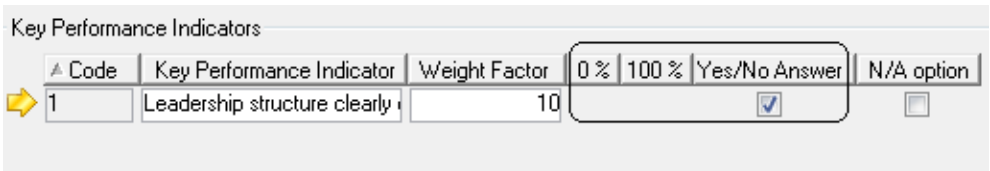
6. Add as many KPIs to the selected sub-element as required.
7. Select the next sub-element and add a list of KPIs to it.

   When you are finished with one element and all of its sub-elements, select the next element and repeat the process.
8. **Save** the list.

5.1.3.1 Answering The KPI: Yes/No Or Percentages

There are two ways users can provide an answer to a KPI when performing a self assessment: with a 'Yes' or 'No'; or, with a percentage value.

Yes/No Answer. When you flag this checkbox, the **0%** and **100%** fields are deactivated:



When assessing this KPI the only accepted answer from the end user will be 'Yes' or 'No'.

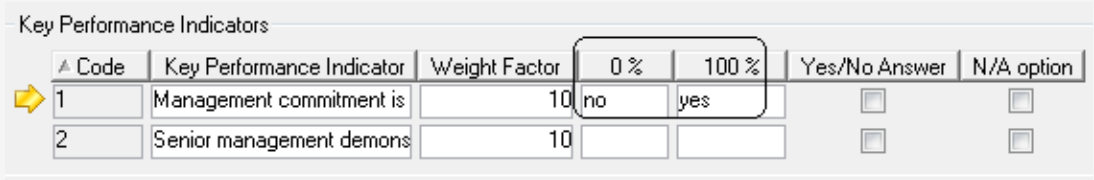
Yes and No need to be converted to a percentage for AMOS to calculate the overall score with. This conversion is handled by the system parameter 'Yes No Score' which defines whether answering 'Yes' results in a score of 0% or a score of 100%.

Percentage Values. Rather than answering 'Yes' or 'No' to a KPI, end users can provide a score using percentages. The **0%** and **100 %** fields are for entering guidelines or boundaries which act as a suggestion to help the user determine an accurate score.

[1]The elements and sub-elements remain the same at each stage, but the KPIs within them should differ. Make sure you select the correct stage before adding KPIs to it.

EXAMPLE

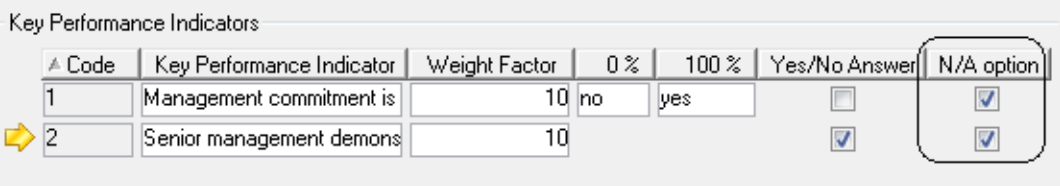
You enter boundaries as shown here:



During assessment, if the end user finds the company fully complies with the KPI (Yes), he/she enters a score of 100%. If the company does not comply at all the with KPI (No) the user enters a score of 0%. Finding partial compliance, the user enters 50% or a score which reflects the amount of improvement needed.

5.1.3.2 Allowing For Non Applicable KPIs

Checking the **N/A Option** on a KPI gives the end user the option to flag this KPI as not applicable. You can flag it regardless of the set answer type:



When the box is flagged and a user registers N/A on this KPI during the assessment, AMOS will prompt for a reason.

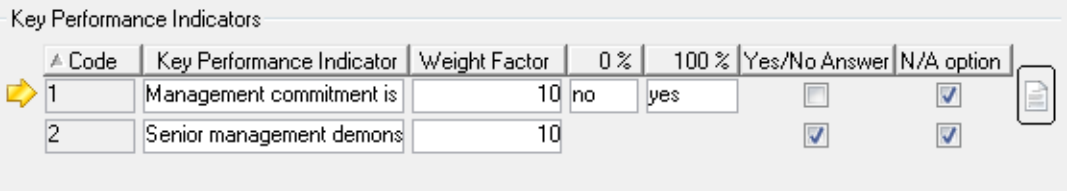
'N/A' needs to be converted to a percentage for AMOS to calculate the overall score with. This conversion is handled by the system parameter 'Not Applicable Score' which defines whether answering 'N/A' results in a percentage value of 0% or 100%.

5.1.3.3 Adding Best Practice Guidelines

You can add a 'Best Practice Guideline' to any KPI, providing the highest standard for comparison. This is a description of the best possible practice as defined by the industry that would ensure a score of 100 % on the selected KPI.

To add a best practice guideline:

1. Click the **Guide** button in the KPI section or go to **Options > KPI Best Practice Guide Line**.
2. Enter the guideline text in the Full Description window and click **OK** to return to the main window.
3. The note icon next to the KPI indicates that guidelines are present:



5.1.4 Work Flow - Issuing A Self Assessment Configuration

Self assessment configuration revisions are work flow[1] controlled. Only one 'Active' and one 'Draft' revision can exist at a time, meaning that activating a new draft renders previously active revisions obsolete.

When configuration revision is ready, use the go to **Options > Work Flow** to activate it and make it available in the Self Assessment window the next time a user performs a self assessment.

You can create a new configuration revision or change an existing one whenever it is necessary.

NOTE: Self assessment configurations and the assessments themselves are work flow controlled: defined work flows are necessary to set up and use self assessments. The statuses in the Self Assessment Statistics filter are hardcoded to 'Active' and 'Obsolete' and so we recommend incorporating these terms as the user defined statuses when defining the 'SA Configuration' and 'Self Assessment' work flows.

5.2 Performing Self Assessments

To perform a self assessment you evaluate each KPI in the self assessment configuration according to the present stage, and then compare the latest assessment against previous results to evaluate progress.

There are several reasons for performing a new self-assessment revision:

- It is the first time you have incorporated the Self Assessment module at an installation
- The standards have been changed and you need to re-evaluate against newer or more strict criteria
- You perform assessments at regular intervals
- You have changed the work flow status of a previous assessment and so a new one is now required

Self assessments are work flow controlled: you can continue to open the same self assessment revision at its initial status and add to it, until it is finished and ready to be scored and issued with the work flow. Previously completed assessments are stored as separate revisions and retained for historical comparison.

5.2.1 Creating A New Assessment

Self assessments are work flow controlled[2] and only one draft and one active revision can exist at a time: it is only possible to create a new draft if the previous revision is currently active or obsolete.

To start a new assessment:

1. Go to **Assessment > Self Assessment**.

   If this is the first assessment click **Create Entry** in the filter. If other assessments already exist, click **New** when the window opens.

[1] Available work flow actions and statuses depend on your own work flow configurations. Those listed here are examples using the pre-configured work flow and so may differ from your own.
[2] Available work flow actions and statuses depend on your own work flow configurations. Those listed here are examples using the pre-configured work flow and so may differ from your own.

2. The left side contains the hierarchy of assessment revisions. Click on a folder icon to expand the list of assessment elements/sub-elements.
3. Select an element to see the KPIs it contains on the right side of the window.
4. Score the KPIs. See section 5.2.3.

5.2.2 Continuing An Existing Self Assessment

If you do not complete a self assessment revision entirely in one session, save it at its initial work flow status. At any time, you can continue the same assessment by simply opening the record and continuing to score it as usual.

If an assessment revision is currently in progress, open the Self Assessment window to continue with it:

- Expand the folder in the hierarchy to display the list of elements it contains.
- Select any element to open it in the General tab and display the associated KPIs and the scoring, if that element has been scored already.

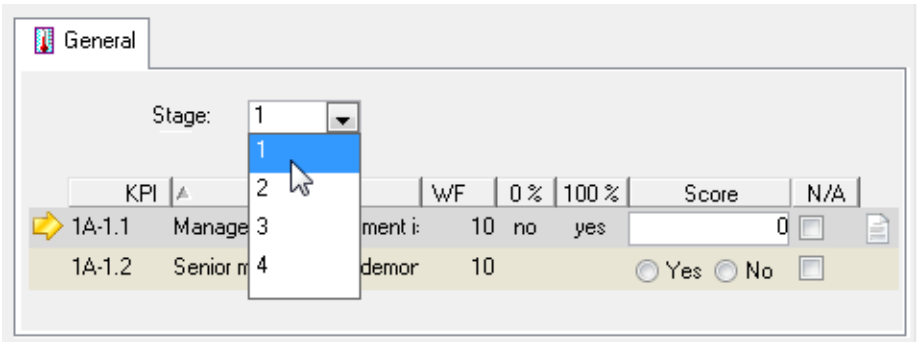
When the self assessment is complete, update its work flow status accordingly.

5.2.3 Scoring A Self Assessment

Each self assessment revision is evaluated against the most recently issued self assessment configuration. Meeting the KPIs in each element with a 100% score indicates that your company is performing at the top standards demanded by the industry. To receive 100% on an element, you must receive 100% on each KPI that belongs to it.

To score a self assessment:

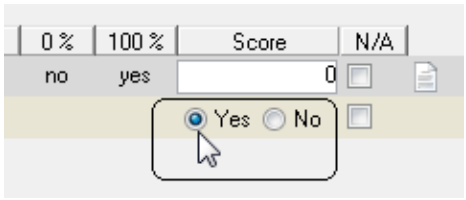
1. Go to **Assessment > Self Assessment**.
2. Select an existing assessment revision or create a new one. See section 5.2.1.
3. Expand the revision in the hierarchy and select an element.
4. Remember that the KPIs differ from one stage to the next. Select a **Stage**to list the KPIs for the selected element:



5. Select a KPI. Enter a **Score** that you feel is appropriate and reflects the level your company is at. There are two ways to provide a score on a KPI[1]:

   Yes/No[2]. Click the answer:

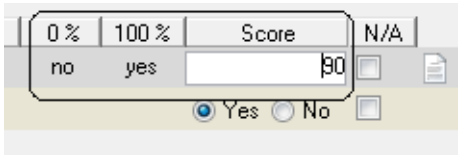
[1]The type of answer required on each KPI is defined in the self assessment configuration.
[2]AMOS converts 'Yes' and 'No' to a percentage in order to calculate the overall score. This conversion is handled by the system parameter 'Yes No Score' which defines whether answering 'Yes' results in a score of 0% or a score of 100%.



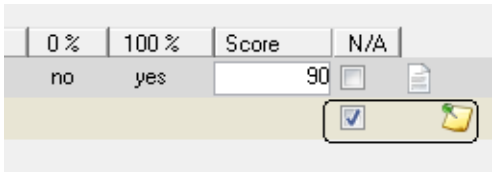
Or,

Percentage Value. Provide a score using percentages.

In this case **0%** and **100 %** are boundaries which act as a suggestion to help determine an accurate score. For example, not meeting the standard at all would result in 0% and meeting it exactly would result in 100%:



Some KPIs might accept a 'non-applicable' answer. If you flag **N/A**, a Details page will open and you will need to enter a reason:

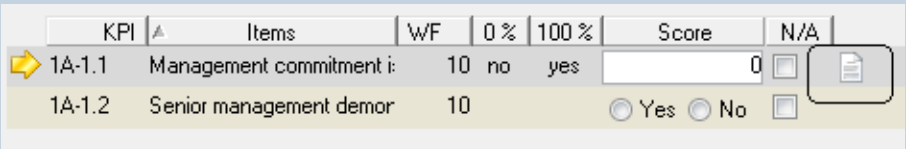


Go to **Options > Remarks** to add any comments or explanations for the score you provided on any KPI.

6. Progress through the elements entering scores for each KPI. **Save** as you go.
7. When an assessment is complete, update its work flow status at **Options > Work Flow**.

TIP

A KPI may have some **Best Practice Guide Lines** defined against it. These are descriptions of the best possible practice needed to ensure a score of 100% for that KPI and are indicated by the note icon:



To read thes guidelines select 'KPI Best Practice Guide Line' from the Options or right-click menu.

5.3 Self Assessment Statistics

To see the current calculated scoring on an assessment:

1. Go to **Assessment > Self Assessment Statistics**.
2. Select an assessment in the hierarchy.

5.3.1 Statistics - Graphs

The Graphs tab shows one graph for each of the four TMSA stages:

- The horizontal axes display the number of elements in each stage.
- The vertical axes display the percentages 0 to 100.

Select an assessment revision in the hierarchy to visualise the score for each element at every stage (as evaluated so far).

5.3.2 Statistics - Elements

The Elements tab contains a chart displaying the scoring for all elements in the selected assessment. Each element is listed with its score at each stage. The **Score** shows the total score for each element across the stages and the average score at each stage and overall.

The graph on the left shows the stage each element is at: a stage is completed only when you receive a score of 100. So to reach stage 3, the scores for stages 1, 2 and 3 must be 100.The graph would then display a bar for that element reaching to stage 3.

The graph on the right displays the average score of all elements combined, at each stage.

5.3.3 Statistics - Sub-Elements

The Sub-Elements tab contains a chart displaying the scoring for all sub-elements in the selected assessment. Each sub-element is listed with its score at each stage.

The **Score** shows the total score for each sub-element across the stages.

CHAPTER 6 Q&S Registers

The following section is a brief description of the registers pertaining to the AMOS Q&S module of the Business Suite.

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**.

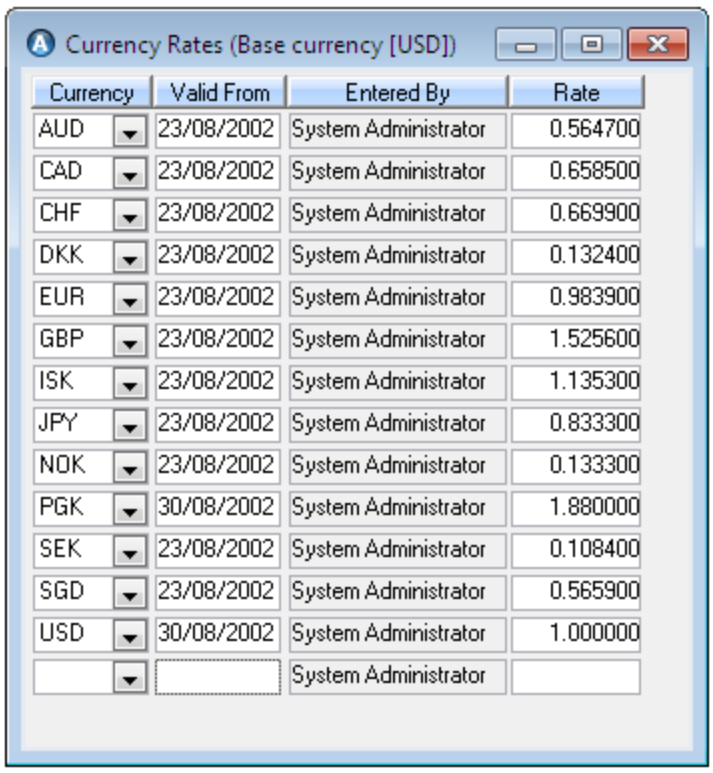


Figure 17 The Currency Rates register

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

For detailed information about all registers in the system, see also the *AMOS Business Suite Reference Manual.*

Register Name	Description
Addresses	Code and address for makers, vendors, employees, etc.
Employees	Code, name, discipline, etc., for each employee.
Permits to Work	Available work permits for use with jobs.
Disciplines	Types of employee available at any installation. Used for specifying who should perform work, or to list work for different groups.
Job Triggers	Triggers for linking to a job. They schedule jobs which are carried out when a certain event - a trigger - occurs.
Sources and References	Attachments for adding to procedures, non conformities, manuals, etc.
Categories	Categories for dividing up procedures.
Job Descriptions	Job descriptions for assigning to procedure jobs.
Document Templates	Document templates for use with procedures.
Non Conformity Type	Types of non conformities which can occur.
Non Conformity Category	Main and sub categories for non conformities.
Non Conformity Severity	Levels of severity; predefined from 1 (highest) to 5 (lowest).
Non Conformity Cause	Causes for assigning to non conformities.
Contact Types	External, internal and vessel specific contacts, for use in the ERS module.
Insurance Category	For use in the Insurance window.

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