AMOS Business Suite

Version 10.1.00

Reference Manual



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CONTENTS

CHAPTER 1 The AMOS Framework

The Client/Server Model 2
The Hardware Components 2
The Software Components 2

CHAPTER 2 The Registers

Adding and Deleting Data 4
Adding to a Register 4
Deleting from a Register 4
Addresses 5
Products and Contacts 5
Address Types 6
QA Grades on Address Types 7
QA Grades on Stock 8
Address Relationships 10
Locking and Unlocking an Address 12
Moving Address References 12
Employees 12
Reporting Work by Employee 13
Locations 13
Currency Rates 14
Permits to Work 14
Vessel Details 15
Framework Registers 15
Templates 15
Disciplines 16
Counter and Measure Point Types 16
Product Types 17
Currency Codes 17
Quality Codes 18
Quality Resolution Codes 18
Evaluation Category 18
Units 19
Vessel Types 20
Job Triggers 20

SpecTec

Additional Cost 20
Job Classes 21
QA Grades 21
Stock Grades 21
Account Codes 23
Audit Trail Reason 24
World Regions 24
Countries 24
Ports 25
Berth Type 25
M&P Registers 25
Job Descriptions 25
Component Classes 27
Function Criticality and Indicators 28
Project Categories 29
Reschedule Limits 30
(Maintenance) Criteria 30
(Maintenance) Types 30
(Maintenance) Classes 31
(Maintenance) Causes 32
Failure Modes 32
Failure Effects 33
Failure Descriptors 33
Failure Detection Methods 33
Failure Severity 34
Resource Activity 34
Resource Activity Status 34
Stock Classes 35
The Price Classes Register 36
Transfer Reasons 36
Order Priority 37
Delivery Terms 37
Payment Terms 38
Delivery Locations 44
Receipt Status 45
Voucher Category 45
Expense Type 45
Finalise Type 45
Order Form Content 45
Order Form Origin 46
Quotation Compare Item Code 46
Attachment Registers 47
Attachment References 47
Q&S Registers 49
Categories 49
Quality Job Descriptions 49
Document Templates 50
Non Conformity Types 50
Non Conformity Category 50
Non Conformity Severity 51
Non Conformity Cause 51
Emergency Response System 51
Insurance Category 52
Risk Management Registers 52
Voyage Management Registers 57
Cargo Group 57

Cargo Type 57
Cargo Attribute Type 57
Delay Activity 57
Delay Reason 57
Event Type 57
Personnel Registers 58
Crew Management 58
Employee 61
General 63
On Board Administration 63
Slopchest 64
System 64
Payroll Registers 65
Accumulators 65
Banks 65
Bargain Agreement 65
Currency Rounding 65
Period 66
Wage Type 66
Tools Menu Registers 66
Approval Limits 66
Account Code Categories 67
Cost Centres 67
Budget Codes 67
Transaction Codes 68
Stock Grade Categories 70
Depreciation Levels 71

CHAPTER 3 Installations and Departments

Managing Installations and Departments 74
Creating a New Installation 74
Adding a Department to an Installation 74
Activating/Deactivating Installations/Departments 74
Installation Groups 75
Creating a New Group 75
Assigning an Installation to a Group 75
Switching Departments 75
Multi Company Management 76

CHAPTER 4 Users, Groups & Access Control

Setting Up Users, Groups and Access 78
Users 78
Creating a New User 78
Linking Employees and Users Together 78
Enabling/Disabling Users 79
Adding Users to Groups 80
Passwords 81
Default Origin on Purchase Forms 83
Moving User References 84
Mailbox Access 85
Logging On With Windows Credentials 85
User Groups 88
Creating a New Group 88
Global Access versus Department Access 88
Local Access 89

Groups and Approval Limits 89
Assigning Users to Groups 90
Setting Group Access Rights 91
Job Class Access 91
Budget Code Access 91
Cost Centre Access 92
Procedure Category Access 92
Order Form Origin Access 93
Stock Class Access 93
Department Access 94
Access Control 94
Copying Access Configurations 95
Registers Tab 98
Fields Tab 98
Functions Tab 98
Reports and Modules Tab 98
Combined Access 98
Tab and Field-Level Access 101
Creating an Access Grouping and Adding Fields/Tabs 101
(Optional) Defining Access Expressions 105

CHAPTER 5 Configuration

System Parameters 108
Searching the Parameters Window 108
Auto-Numbering 109
Default Templates 110
Directories 110
Attachment Parameters 112
Dashboard Parameters 113
Database Parameters 113
Default Settings 113
Editor Parameters 117
File Extensions 120
Portal Parameters 121
Work Flow Parameters 122
Report Parameters 124
Search Parameters 125
System Access Parameters 125
Other Parameters 127
Accounting Parameters 131
Financial Parameters 132
Maintenance Parameters 134
Payroll Parameters 143
Personnel Parameters 144
Purchase Parameters 145
Self Assessment Parameters 153
Stock Parameters 153
Voyage Parameters 156
Sharing 157
User Defined Fields 158
Number Series 158
Work Flow 160
Work Flow Actions 160
Work Flow Statuses 161
Building Work Flow Transformations 161

AMOS Actions and Access to Transformations 162
Work Flow Initial Statuses 164
Work Flow Lock Types 165
Converting Work Flow Status 165
Work Flow Configuration Revisions 166
Using the Work Flow 168
Remote Work Flow 170
Remote Work Flow Parameters 170
HTML Types and Web Browser Support 171
Configuring Remote Work Flow 172
Enabling Remote Work Flow 174
Using Remote Work Flow 175
Mandatory Fields 175
Account Transactions 176
Cost Centres 177
Account Codes and Categories 177
Linking Account Codes to Cost Centres 178
Tracking Account Transactions 178
Audit Trails 179
Audit Trail Configuration 180
Setting an Audit Trail to Require Change Reasons 184
Using Reason Codes 185
Providing Change Reasons on Audited Fields 188
Activating an Audit Trail 189
Viewing Audit Trail Results 189
The Login Audit Log 190

CHAPTER 6 The AMOS User Interface

User Options 192
General User Options 192
Views 196
Predefined Fields 199
Predefined Filters 202
Customised User Interface 204
Dashboard User Options 205
Themes 209
Dashboard Alerts 211
Defining Alert Groups 211
Defining a New Alert 212
Alert Threshold Definition and Notifications 215
Enabling Alerts on Your Dashboard 216
Alert Gauges 217
Sending Threshold Notifications 217
Refreshing Dashboard Alerts 219
Retrieving Data From Outside AMOS: External Alerts 220
Overview Panels 221
Configuring Overview Panels 221
Translating Text in AMOS 223
Before You Begin - Source Files 223
Starting a Translation Project 224
Other Tools in the Translation Window 226
Translating Text with Locations 227
Applying Translated Text in AMOS 227
Validation and Special Characters 228
Updating a Translation Project 228

CHAPTER 7 External Communication

Export/Import 230
Export/Import Tasks 230
The Task Server 231
Manual Export/Import 232
Setting Transfer Directory and File Extensions 233
Export/Import Selection File Commands 234
Export/Import Log and Portal Log 238
Introduction to e-Business 239
Configuration 239
Sharing, Access Rights and Parameters 240
e-Business User Contact Details 241
Defining Portal Formats 243
Registering a Portal 244
Portal Settings 245
Tamper Control 247
Connecting Vendors 248
Export/Import Tasks for e-Business 249
Custom Templates for e-Business 251
Using the AMOS e-Business Direct Portal 251
Sending and Receiving Forms 252
e-Business Customisation 252
3-In-1 Portal Driver: Three HTML Concepts 253
HTML/XML 253
HTML/JSON 254
HTML/No Script 255
Condition Based Maintenance 256
CBM Jobs 256
Designating the CBM Directory 257
Defining CBM References 258
CBM Day Files 258
CBM Alarm Interface 259
Hand Terminal Interface 260
File Format 261
File Sample 262
SMS Notifications 262
Creating a Notification Task 262
Connecting a Device 263
Defining Mobile Numbers on Notification Recipients 263
Send SMS via the Work Flow 264
Sending an SMS Via the Work Flow 265
Import/Export Task Error Notifications 266

CHAPTER 8 Defining and Using Attachments

Getting Started with Attachments 268
Defining Attachment Source Tools 268
Defining a Source 268
Graphics Directory 268
Attachment References 269
Adding an Attachment Reference 269
Storing Attachments in the Database 270
Source and Reference Definition Example 271
Adding Attachments in AMOS 272
Finding Out Where Attachments are Used 273
IMPORTANT: About Adding Attachments without a Reference 273

Adding Registered Attachments 275
Adding Attachments with the Find File Button 276
Adding Attachments by Drag and Drop 277
Importing Attachments 279
Viewing Attachments 281
Hotspots on Attachments 281
Defining a New Hotspot 282
The Attachment Workspace 286

CHAPTER 9 Templates and the Form Designer

Creating a Basic Template Record 288
Creating a Custom Form 288
Opening a Form in the Form Designer 289
Saving a Form 289
Designing Your Form 289
Connecting a Form and a Template 291
Converting a Template 292
Defining Access Rights on Enhanced Templates 293
Default Templates 294
Assigning or Changing a Template 294

CHAPTER 10 Reports and Extension Features

Getting Started with Reports and Extension Features 298
Running and Printing Standard Reports 298
Previewing a Report 298
Printing a Report 299
Changing the Default Printer 300
Saving a Report as a PDF 300
PSR Reports 303
User-Defined Reports 304
Adding a Report to the Hierarchy 304
Adding External Modules to AMOS 307
Defining an External Module 307
Access Modules 308
Creating an Access Module 308
Adding a User Defined Report/External Module to an Access Module 309
Granting User Access to Reports or External Modules 310
Printer Tasks 311
Defining Printer Tasks 311
Assigning Printer Tasks to Reports 311
Printing Barcodes on Labels 311

APPENDIX A AMOS Internal Work Flow Actions

Introduction 314
List of Actions 314

APPENDIX B Address Type Lookup Limitations

Introduction 326
List of Lookups 326

APPENDIX C Access Control Listings

Registers Tab 330
Fields Tab 357
Functions Tab 364
Reports and Modules Tab 393

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 : Singapore +65 622 071 16

Northern Europe (NEMEA)

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CHAPTER 1

The AMOS Framework

AMOS Business Suite is a highly customisable software solution. Your purchased license determines which modules you have access to - the functionality available with Maintenance & Purchase, Quality & Safety, and Personnel. All of these modules share the same common Framework.

Refer to this manual for information about working in the Framework windows - that is, those listed on the File menu and the Tools menu. Most of the material in this Reference Manual is organised according to topic, or administrative tasks and processes.

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The Client/Server Model

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

The Hardware Components

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

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

The Software Components

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

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

CHAPTER 2

The Registers

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

Information in any register can be linked to other registers: for example supplier names and addresses, or next-of-kin and addresses. Normally this information is entered into the database manually. Most of the registers are available at **File > Open Register >** . Some are also available from the **Tools >** menu. Access control determines which user groups have access to each individual register.

This chapter includes the following topics:

Adding and Deleting Data 4
Addresses 5
Employees 12
Locations 13
Currency Rates 14
Permits to Work 14
Vessel Details 15
Framework Registers 15
M&P Registers 25
Attachment Registers 47
Q&S Registers 49
Voyage Management Registers 57
Personnel Registers 58
Payroll Registers 65
Tools Menu Registers 66

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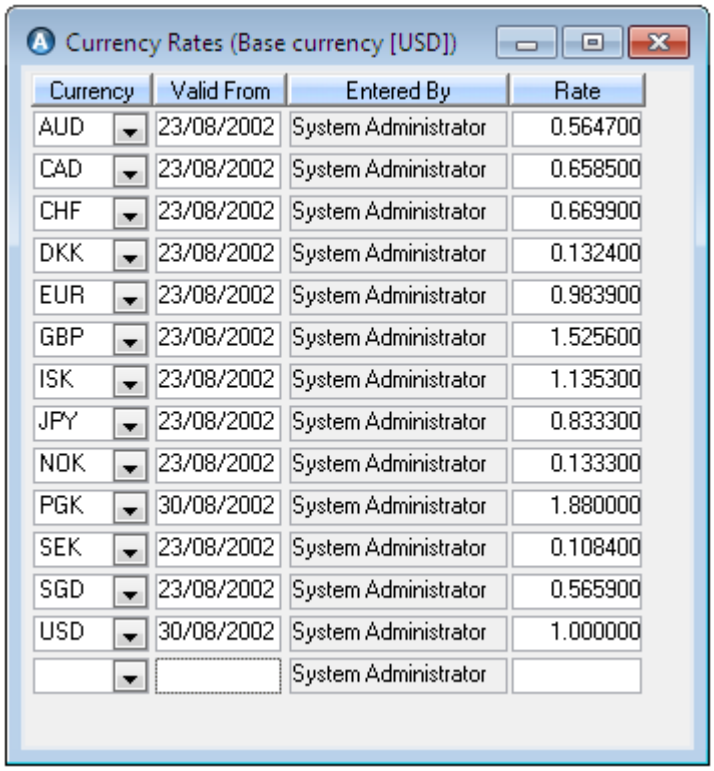
Adding and Deleting Data

The procedure for adding data to and deleting it from a register is similar for the majority of the registers.

Adding to a Register

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**.



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.

Deleting from a Register

1. Go to **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.

Addresses

File > Open Register > Addresses

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

To create a new address record:

1. Go to **File > Open Register > Addresses** or click the  toolbar button.
2. Click **New**.
3. Give the address a **Code** and **Name**.
4. Enter the address itself.

   > **T i p**
   >
   > Select a **Parent Address** to place the current one under and create a hierarchy. For example, putting branch offices of the same company under the head office as 'parent' causes all the related addresses to be grouped together.

5. **Save** the address.

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

- **Portals**. See Chapter 25.
- **Minimum Order Values**. See *'Printing and Sending Purchase Orders'* in the *AMOS M&P User Guide*.
- **Output Formats**. See *'Printing and Sending Purchase Orders'* in the *AMOS M&P User Guide*.
- **Payment** and **Delivery Terms**. See "Payment Terms" on page 38 and "Delivery Terms" on page 37.
- **Goods Receivable** addresses. See *'Deliveries'* in the *AMOS M&P User Guide*.

Products and Contacts

You can connect a list of products you buy from a vendor to the vendor's address, and you can add contact people to any registered address.

To add products:

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

To add contacts:

1. Go to **File > Open Register > Addresses**.
2. Select an address and open the Contacts tab.
3. **Click New**.
4. Fill in the details.
5. Select 'Active' for contacts in use and 'Disabled' for old ones which are inactive, but you want to

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

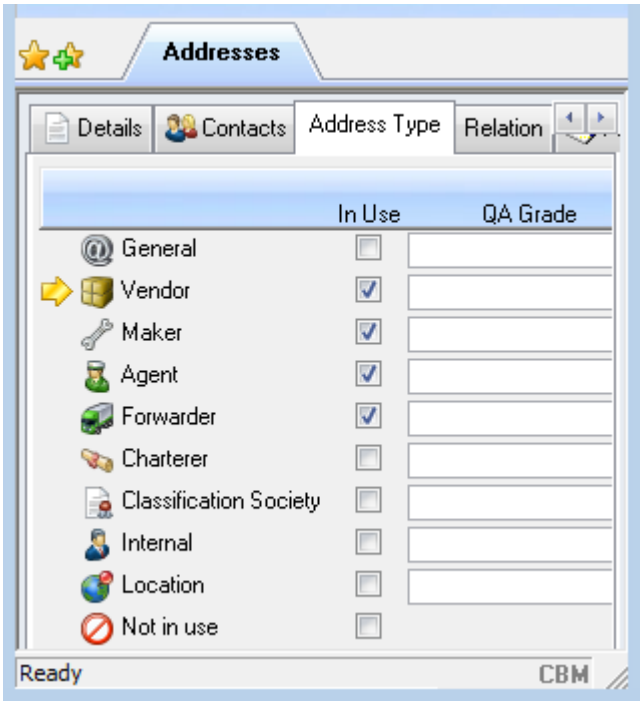
preserve the data.

6. **Save** the register.

Address Types

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

1. Go to **File > Open Register > Addresses**.
2. Select an address and open the Address Type tab.
3. Flag the 'In Use' box next to any types which apply: vendor, maker, agent, classification society, etc.



» Flagging any type(s) makes the address available *only* in lookups in the relevant areas.

> **Note:** See "Address Type Lookup Limitations" on page 325 for a list of lookup fields in AMOS and the valid address types each one will display.

» If you flag several types including 'General', the address will be available system-wide.

» If you don't flag any types at all, the address will be available system-wide.

» To prevent an address from use or selection anywhere in the system, flag the type 'Not in Use'. This cannot be checked without unflagging any other selected types first.

4. **Save** the register.

Setting Multiple Address Types at Once

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

---

[1] See the Appendix 'Address Type Lookup Limitations' in this manual for a list of lookup fields within AMOS and the valid address types each one will display for selection.

[2] Access to this option is set on the Access Control window Functions tab > Common > Set Multiple Address Type.

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

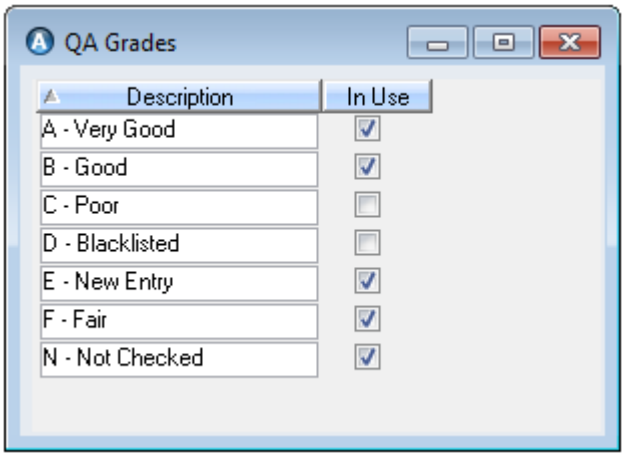
QA Grades on Address Types

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

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

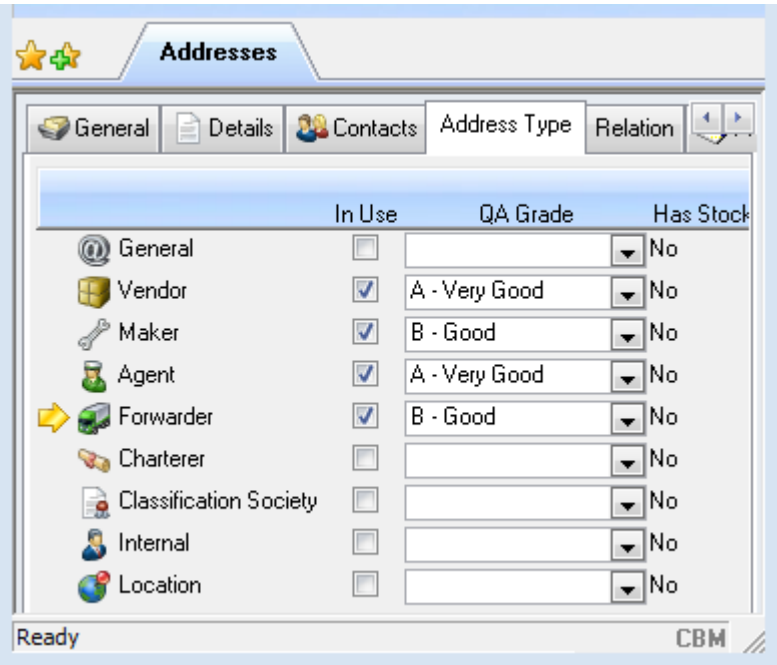
To restrict availability using QA Grades:

1. Define a list of unacceptable QA grades: go to **File > Open Register > General > QA Grades**.
2. Unflag the 'In Use' box next to an unacceptable grade:



   Any addresses assigned a grade which is not 'in use' will not be available for selection.

3. **Save** and exit the QA Grades register.
4. Next, assign QA grades to the address type(s) on each address: go to **File > Open Register > Addresses**.
5. Select an address and open the Address Type tab.
6. Flag the types **In Use** for this address.
7. Choose a **QA Grade** from the drop-down list next to each checked type.



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

8. **Save** the register.

Purchase Forms and Blacklisted Vendors

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

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

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

QA Grades on Stock

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

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

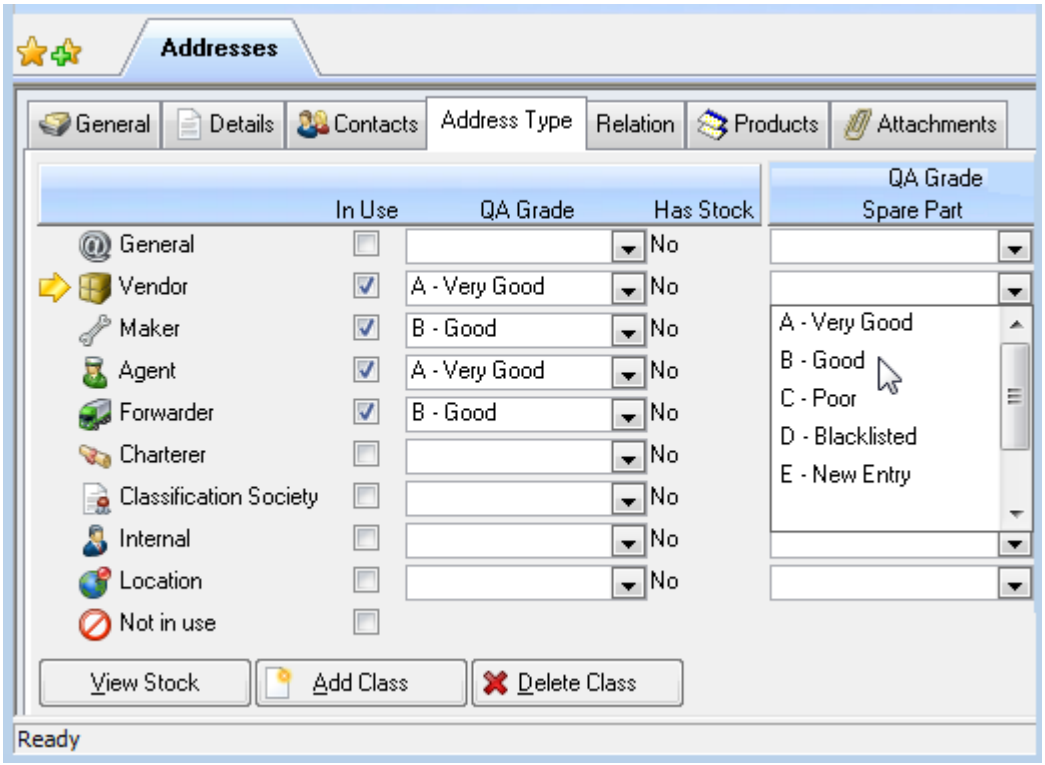
[1] Access Control > Functions tab > Purchase - Allow Selecting Blacklisted Vendors

Assigning QA Grades by Stock Class on Address Types

EXAMPLE

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

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



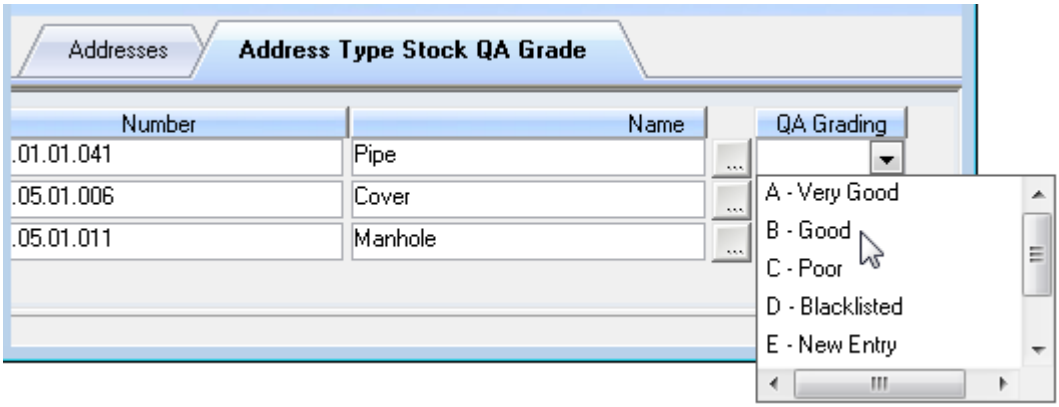
6. **Save** the list.

Assigning QA Grades by Stock Type/Item on Address Types

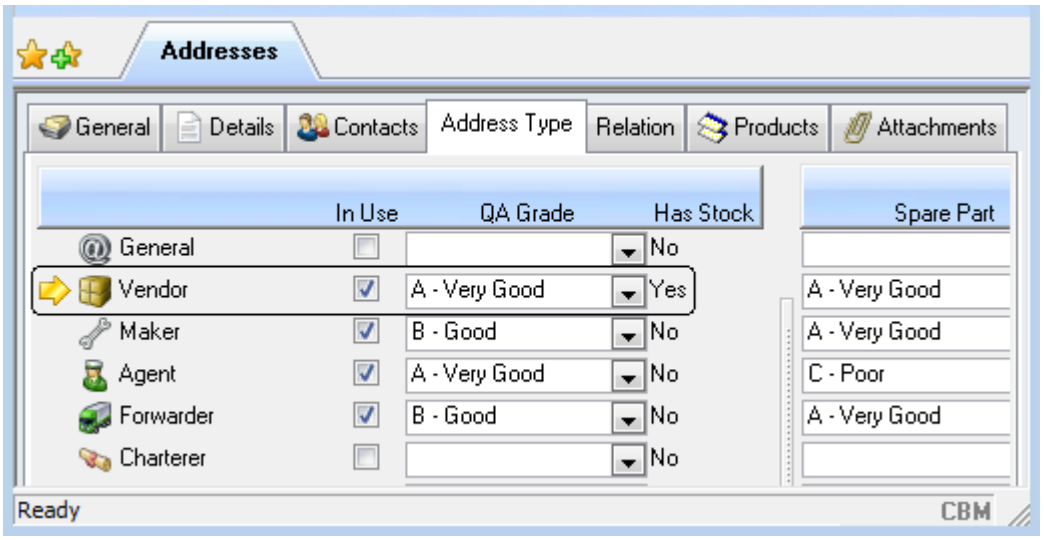
EXAMPLE

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

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



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



Address Relationships

Many of your addresses may be related to each other in some way: head offices and sub-offices, agents and those they represent, etc.

> **EXAMPLE**
>
> The <Italy Office Address> *Is Main Office of* the <Norway Office Address>
>
> The <Toronto Office Address> *Is Represented by* the <Shipping Agent Address>

To link addresses by relationships:

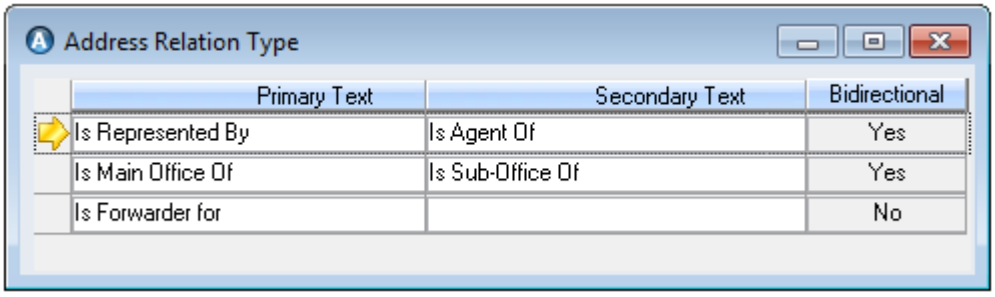
1. Define the types of relationships available in the Address Relation Types register. See "Address Relation Types" below.
2. Relate the addresses in the Address Register > Relation tab. See "Relating Addresses" on the facing page.

Address Relation Types

To define different kinds of address relationships:

1. Go to **File > Open Register > Address > Address Relation Types**.
2. Click the **New** button on the toolbar.

3. Enter a relation type in the **Primary Text** and **Secondary Text** fields, such as 'Is Represented By' or, 'Is Agent Of' or, 'Is Main/Sub-Office Of':



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

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

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

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

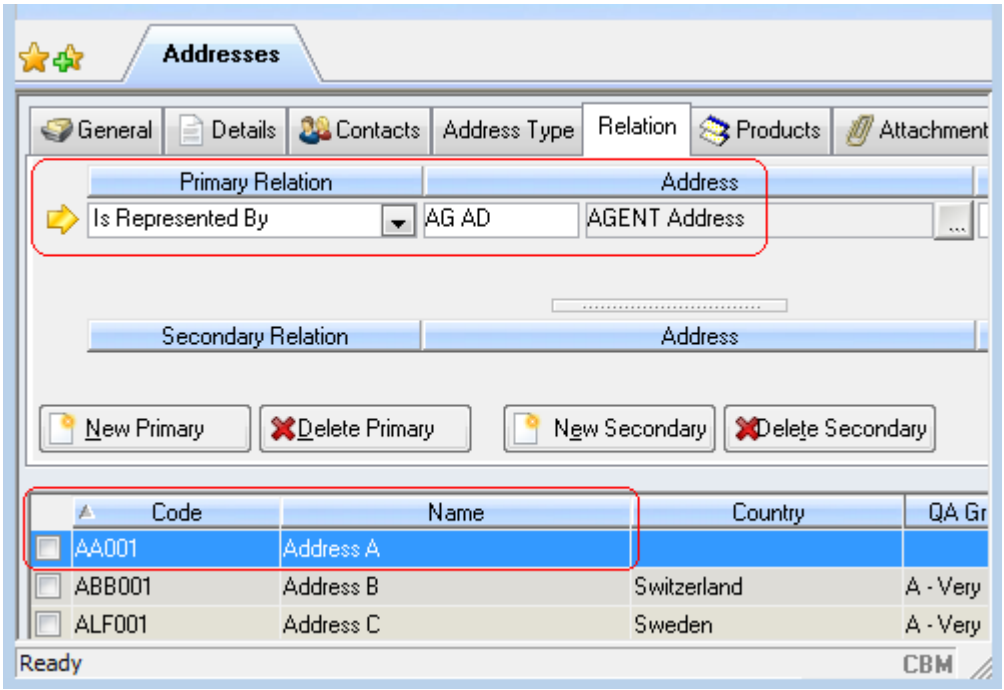
4. **Save** and close the register.

Relating Addresses

Note: Make sure that relation types are already available in the Address Relation Type register first.

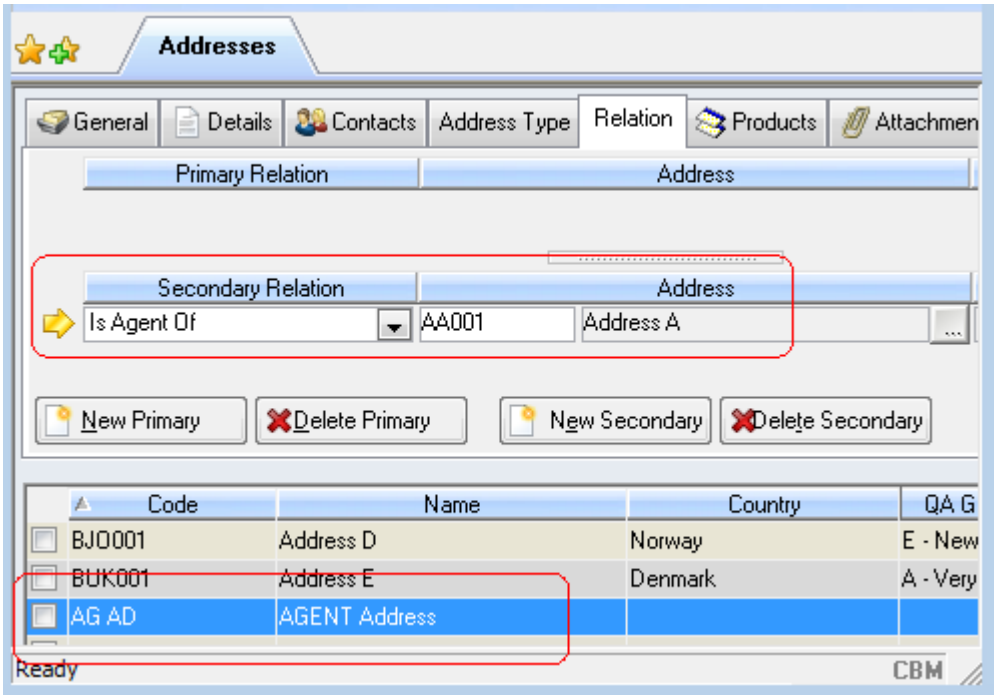
To establish relationships on addresses:

1. Go to **File > Open Register > Addresses**.
2. Select an address and open the Relation tab.
3. Click **New Primary**, and select a 'Primary Relation' type such as 'Is Represented by'. Lookup the address of the agent representing the selected address. In the illustration below, Address A is represented by AGENT Address:



4. **Save** the register.

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



Locking and Unlocking an Address

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

1. Go to **File > Open Registers > Addresses**. Select an address.
2. Go to **Options > Convert**.
3. Choose to lock or unlock it.
4. Click **OK**.

Moving Address References

If you think the same address has been registered multiple times, clean up the Addresses register by moving references:

1. Go to **File > Open Register > Addresses**. Select a duplicated address record.
2. Go to **Options > Move Address References**.

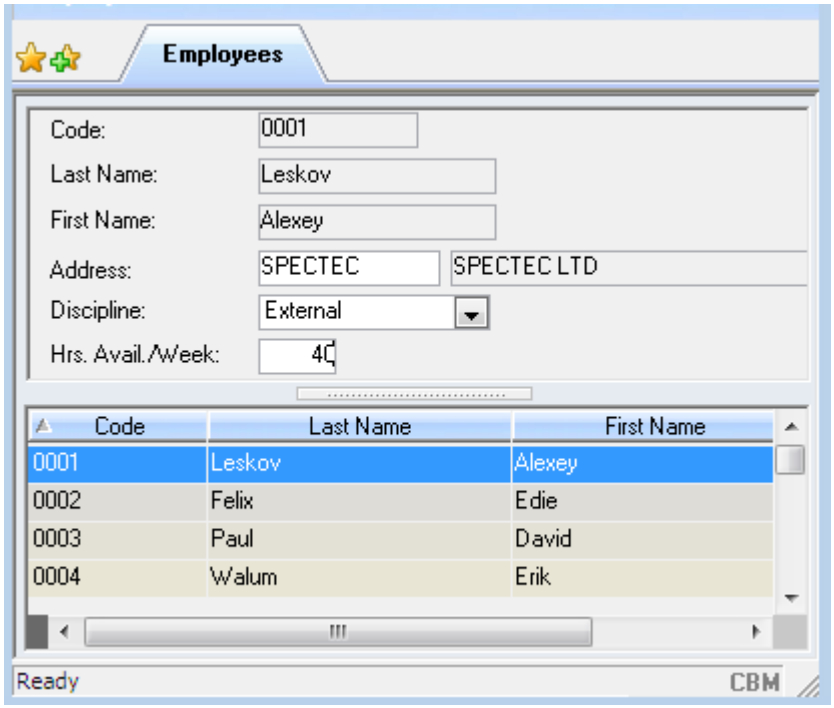
   AMOS lists the rest of the addresses in your system.
3. Select an address to move the first selected references to.
4. Click **OK**.

Employees

File > Open Register > Employees

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

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



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

Reporting Work by Employee

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

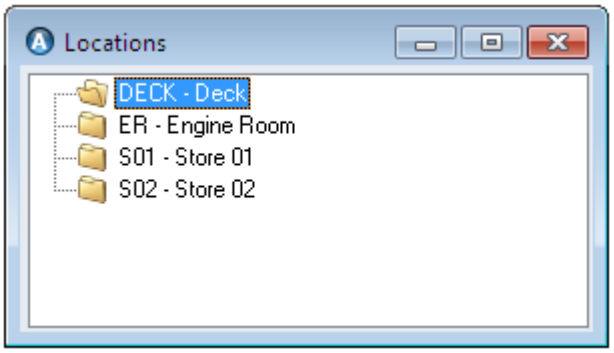
To report by employee, you need to supply each employee's hourly rates in the Employees register > Additional Info. dialog[2].

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

Locations

File > Open Register > Locations

The Locations Register is for defining various physical locations at an installation where components and stock items can be stored or located.



[1] According to the setting of the system parameter > Options > Maintenance > 'Log Work With Employee'.

[2] Requires that at least one each of the Employee User Defined Fields 'bonus1' to 'bonus4' and 'salary1' to 'salary4' are activated by defining appropriate labels.

To add a new location:

1. Go to **File > Open Register > Locations**.
2. To make a sub-location, select a folder in the hierarchy and click the **New** button in the toolbar.
3. Enter a **Code** and a **Name** in the Locations Details dialog.

   To add the location as a folder in the hierarchy instead of a sub-location, flag 'Root Location'.
4. **Save** and exit the register.

To search the register for strings of numbers and/or letters, press the **F3** key or go to **Options > Find** to open the Find window.

Currency Rates

File > Open Register > Currency Rates

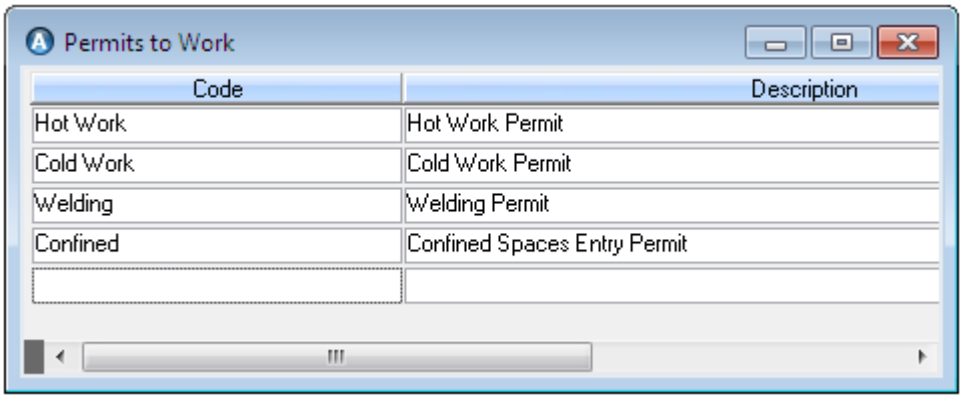
AMOS Business Suite can handle amounts in several currencies simultaneously, against your 'Base Currency' defined in the system parameters. The Currency Rate register is for setting up and updating the rate of each currency you use, compared to the specified Base Currency Rate. Before you can enter any rates here, make sure the Currency Codes register contains a list of available currencies.

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

Permits to Work

File > Open Register > Permits to Work

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



- Select the instructions or form to connect to a work permit from the **Layout** drop-down list. Whatever you select will be displayed when you double-click the permit in the Work Orders window.
- Go to **Options > Details** to preview the selected form or instructions.

Vessel Details

File > Open Register > Vessel Details

This register contains the basic details of each vessel, such as its name, dimensions, tonnage etc. To add information to the greyed-out fields on the General tab, open the Log tab, click the **New** button and fill in the details there.

Framework Registers

AMOS Business Suite contains registers for storing values that are tailored to your organisation and the information you enter is used in many areas of the system.

Templates

File > Open Register > General > Templates

Various documents used in AMOS Business Suite require different layouts. Creating templates lets you customise the appearance of the Details tabs/Full Description windows throughout AMOS: you can add forms containing drop-down lists, selection boxes, input fields and other controls.

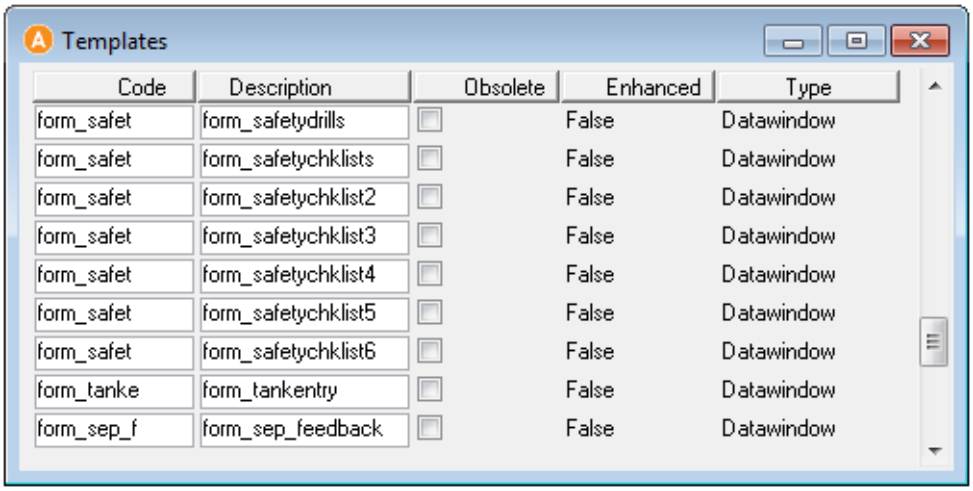
In addition to PowerBuilder forms, AMOS supports two other types of templates:

- When MS InfoPath is installed, you can import and assign InfoPath forms as templates.
- When MS Excel is installed, you can import and assign Excel sheets as templates.

Any window in AMOS which allows templates will accept InfoPath and Excel templates via selection from the Edit menu > Change Template. The template types (PowerBuilder, InfoPath, Excel) are differentiated in the register.

In the Templates register, you:

- Create template records. Click the **New** button on the toolbar and enter a **Code** and **Description**.
- Connect a template to each record. Select an entry in the list and go to **Options > Import Definition** to choose a form definition and link it to the template registration.
- Mark unused templates. Flag the **Obsolete** checkbox to remove a template from use anywhere in the system.
- Convert basic templates to enhanced. Select a template and go to **Options > Convert**. You can flag the original template as obsolete in the process.

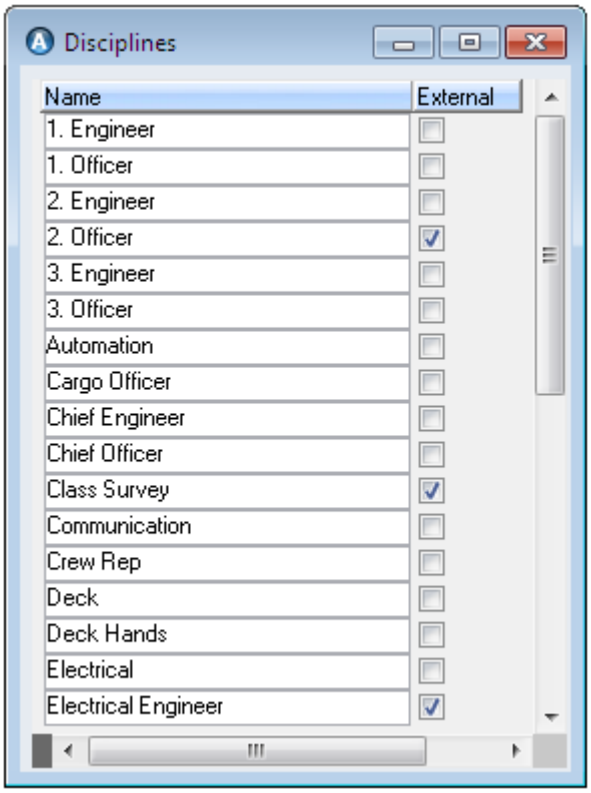


See "Templates and the Form Designer" on page 287 for more about templates, and about creating form definitions to use as templates.

Disciplines

File > Open Register > General > Disciplines

Define a list of disciplines for use with maintenance work, cost tracking and so on.



Flagging a discipline as **External** marks it throughout the system with an asterisk *. External disciplines are used in conjunction with work orders if you want to purchase services externally. It's also possible in some filters to differentiate between internal and external disciplines.

Counter and Measure Point Types

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

The Counter Types register is for defining the different types of counters and measure points that handle periodic maintenance jobs and condition based maintenance.

Max.Per Day is the maximum value AMOS will allow a user to input. This helps prevent mistakes during updates. According to your selection in the **Max Per Day Check** field, AMOS will perform the check against:

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

Composite Counters

A composite counter is a combination of other counters linked together, with a formula:

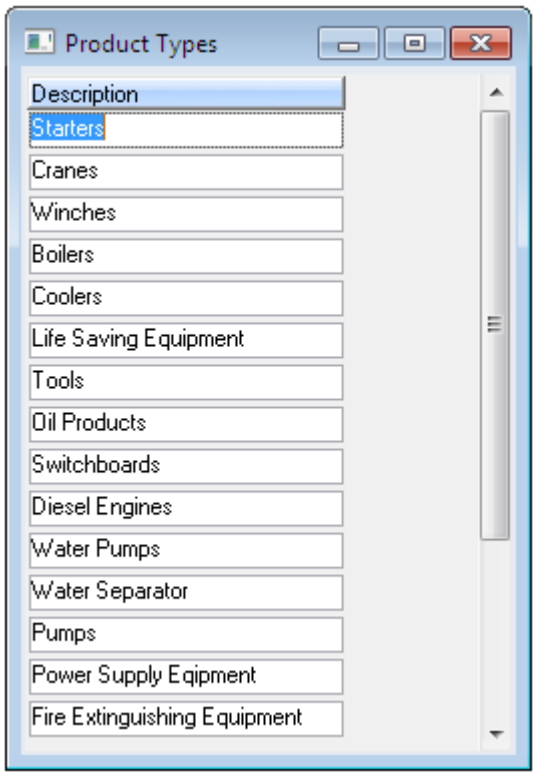
```
Counter1 = Number of Startups
Counter2 = Running Hours
Counter3 (Composite) = Counter1 * Constant + Counter2
```

To define a composite counter select it as the **Type**, and then lookup an **Expression**. AMOS will read the expression like any other counter.

Product Types

File > Open Register > General > Product Types

The Product Types register is for defining different categories or types of products. This information is useful for searching in the Addresses register and linking an addressee to a type of product they supply.



Currency Codes

File > Open Register > General > Currency Codes

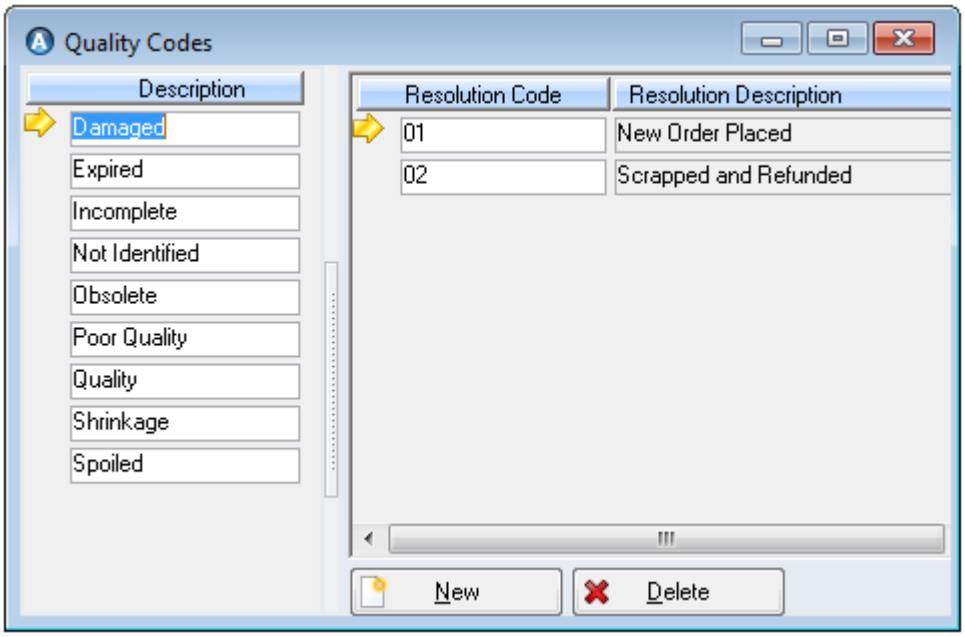
The Currency Codes register is for information about the currencies your organisation uses. The related Currency Rates register is for entering new and updated exchange rates between the currencies as changes occur.



Quality Codes

File > Open Register > General > Quality Codes

While receiving line items, users may need to perform quality checks and claims, and will use the quality codes listed here like 'Damaged', 'Expired' and so on to identify problems with unsatisfactory items.



Linking Quality Codes and Quality Resolution Codes

When a user eventually closes a quality claim, he/she will select a Quality Resolution Code to indicate how it was settled - that the items were 'Scrapped', 'Returned', 'Refunded', etc. If you link the predefined resolution codes to quality codes, it narrows the selection of resolutions the end user has to filter through: only the resolutions linked to the quality code on the claim will be available for selection. To link a resolution to a quality code, make sure you have a list of resolutions in the Quality Resolution Code register and then:

1. Go to **File > Open Register > General > Quality Codes**. Select a code on the left side.
2. Click **New** at the bottom of the right pane.
3. Use the lookup to add a **Resolution Code** and **Description**. Add as many as apply.
4. **Save** the register.

If don't link any resolutions to a particular quality code then all defined resolutions will be available on claims referencing that code.

Quality Resolution Codes

File > Open Register > General > Quality Resolution Codes

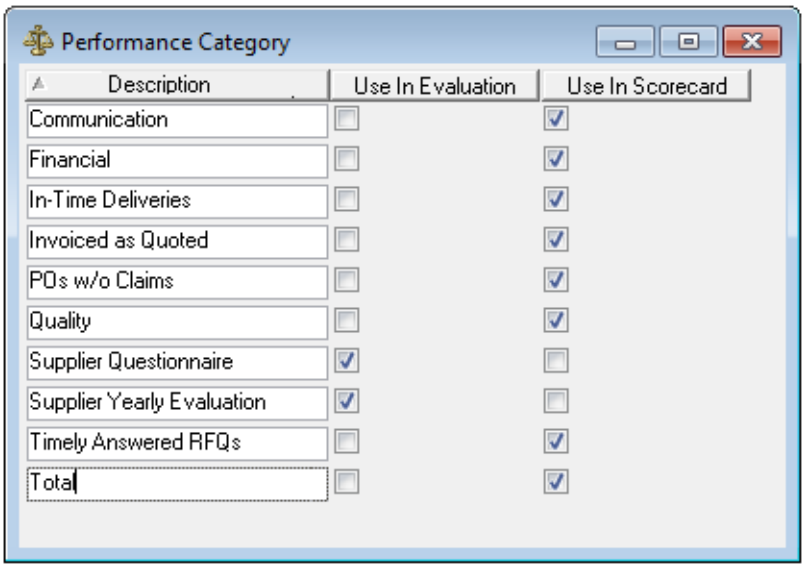
Quality resolution codes listed in this register are for selection upon closing a claim against line items on a purchase order. Users can specify that the items in question were, for example, 'Returned' or 'Scrapped' or 'Refunded'.

Evaluation Category

File > Open Register > General > Evaluation Category

There are two uses for performance categories:

- you can categorise evaluations in the Performance Evaluation window - for example, you might decide to group evaluations into those based on evaluation forms and those based on evaluation scorecards, so you create two categories like *Supplier Questionnaire* and *Supplier Yearly Evaluation* as shown below, and flag 'Use in Evaluation' on each one.
- they are the assessment criteria you will add to your evaluation scorecards. In this case, you'd flag 'Use in Scorecard' for each one.



To add categories:

1. Click **New** and add a **Description**.
2. The two checkboxes are flagged by default. Leave them both flagged, or unflag either one if you won't use the category on a scorecard/in an evaluation.
3. **Save** the register.

Units

File > Open Register > General > Units

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

Flagging the **Decimals** checkbox next to a unit indicates that the unit of measurement can be expressed with a decimal value.

Converting a Unit

You can convert one unit to another, to indicate how many of the selected unit it takes to make up the source unit.

> **EXAMPLE**
>
> You want to convert Inches to Metres. You select 'Inch' in the list. You lookup the **Source Unit** 'Metre' and enter *39,4 in the **Conversion Expression** field. When you save, this results in the **Formula** 1 Metre = 1 Inch *39,4.

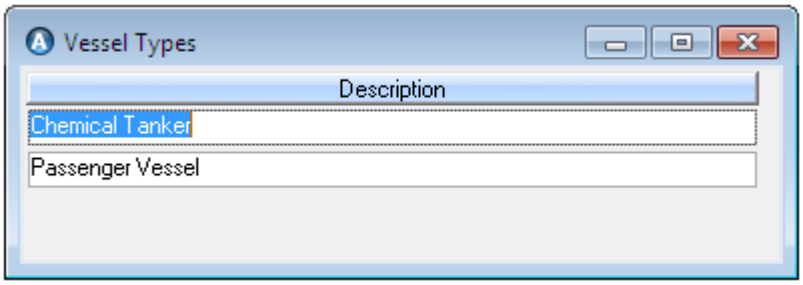
1. Select a unit in the list on the left.
2. Lookup a **Source Unit**to convert to.

3. Enter a **Conversion Expression** that results in the appropriate conversion.
4. Click **Save**. The resulting **Formula** will appear automatically.

Vessel Types

File > Open Register > General > Vessel Types

List the types of vessels owned and/or used by your company. This information is used in the Vessel Details register.

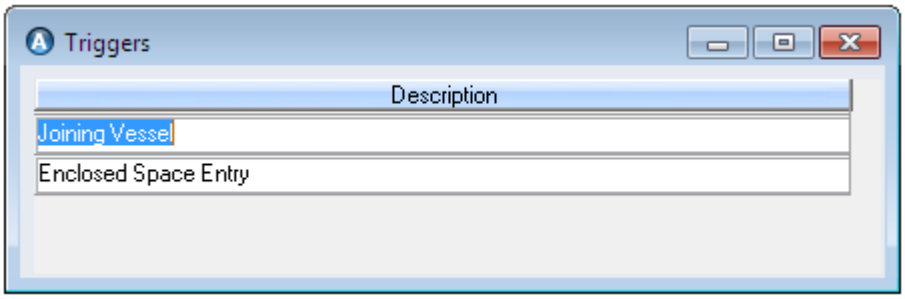


Job Triggers

File > Open Register > General > Job Triggers

Triggers schedule jobs that must be carried out at certain intervals: a trigger named 'Weekly' could activate a job to be carried out every week. They can also be used to schedule jobs which should be handled when a specific event occurs, such as 'Pilot on board' or 'Arriving in Port'.

This triggers listed here are for linking to procedure or component jobs.



Additional Cost

File > Open Register > General > Additional Cost

Use this register to define types of extra costs like Shipping, Insurance, etc., which are incurred when ordering stock items. Additional costs registered here are available for use on order forms, quotations and vouchers.

You can assign each additional cost entry to a budget code here and the budget code will appear with the additional cost whenever a user adds it. If you do not define a budget code or an active budget does not exist for the code you select, the additional cost will be assigned to whichever budget code is defined on the form header.

Flag the **Default** checkbox to automatically list the additional cost on new order forms and quotations. Users can still remove default additional costs.

Job Classes

File > Open Register > General > Job Classes

The Job Classes register is for creating classes which will be attached to Job Descriptions, to reflect the type of work being carried out.

If you are using work flow for maintenance or quality, you can also define here the **Initial Work Flow Status** and the **Initial Lock Type** for each job class.

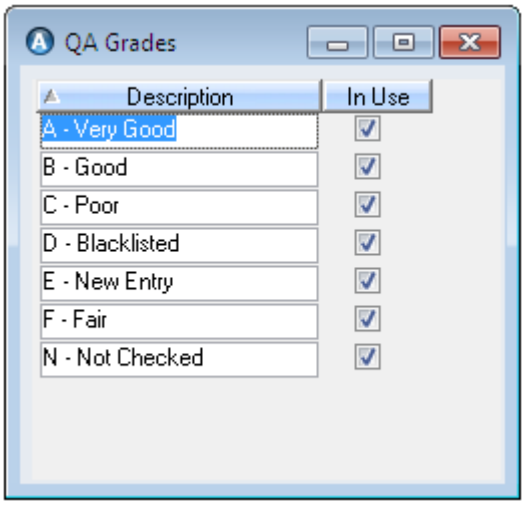
Note: When initial statuses are in use on job classes, AMOS considers the sharing of the Job Class table and not the sharing on the Initial Status.

QA Grades

File > Open Register > General > QA Grades

The QA Grades register is for defining quality assurance grades for assigning to makers and vendors, and so on. QA Grades are particularly useful in the Address register, where assigning one to an address indicates the reliability of that vendor, maker, agent, etc.

To prevent any addresses with a certain grade (like Blacklisted, or Poor) from appearing for selection throughout the system, uncheck the **In Use** box on such grades here. Addresses with a QA grade that is not 'in use' will be unavailable.



Stock Grades

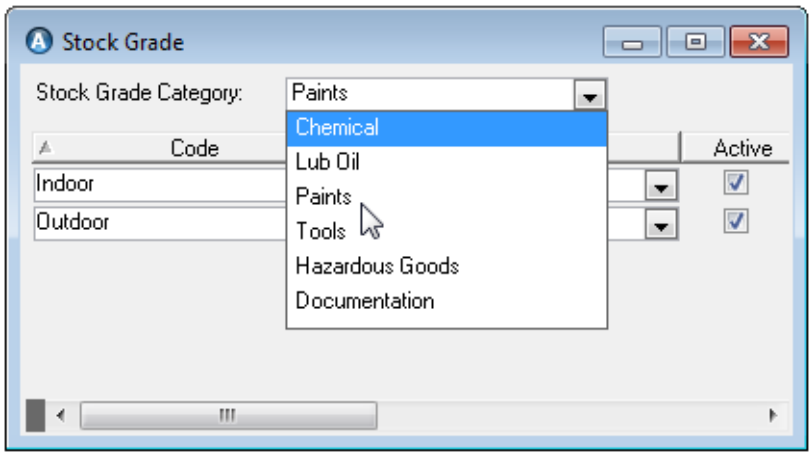
File > Open Register > General > Stock Grades

The Stock Grades defined here can be applied to stock types and so inherited on stock items. When any stock with a grade defined against it is placed on a purchase form, the stock grade is copied to the form.

Defining a Stock Grade

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

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

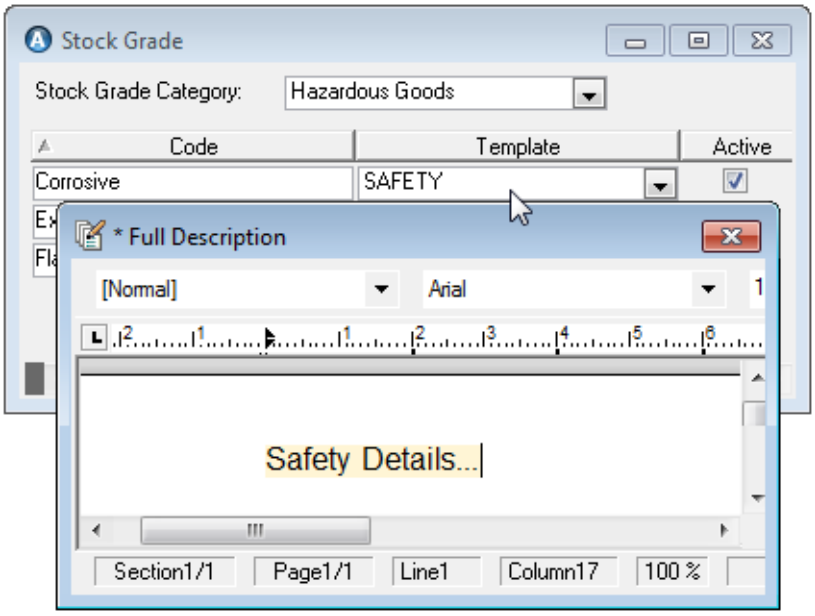


2. Add a stock grade name to the **Code** field.
3. To allow the grade to be applied to stock, flag the **Active** checkbox.
4. **Save** the register. Add as many codes to each category as needed.

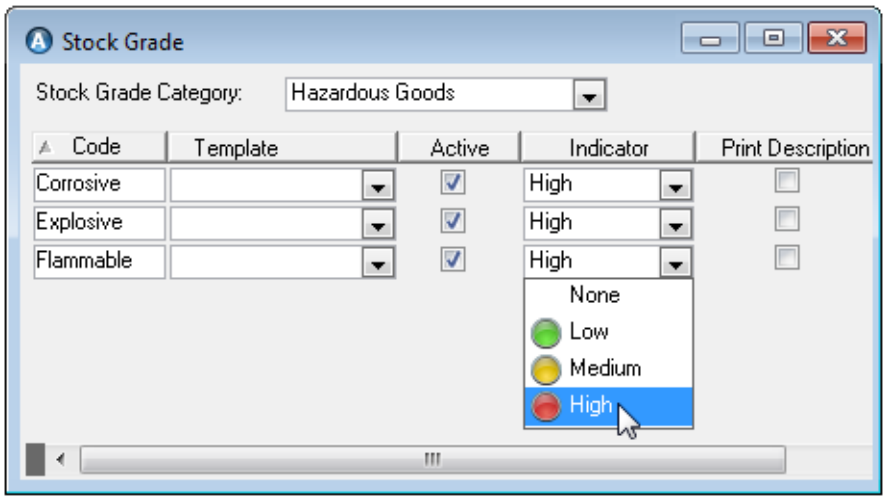
Adding Extra Information to a Stock Grade

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

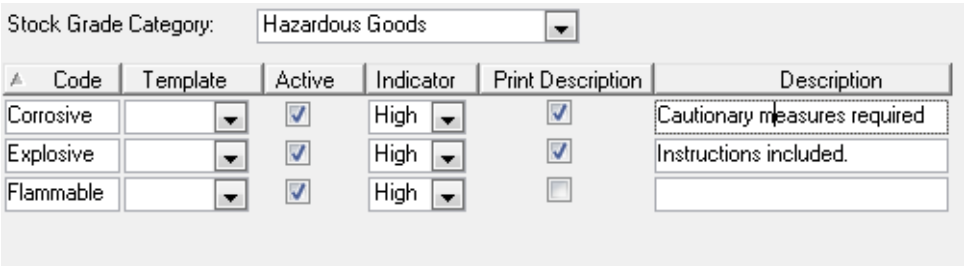
1. Select a grade and go to **Options > Details**. Fill out free-text information, or, select a **Template** for the Details window first:



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



3. When the grade is applied to stock, the icon will show up on relevant stock items in the purchasing process - on order forms, deliveries and transport documents. Forms, deliveries and transport documents can also be filtered by stock indicator level.
4. Enter a free-text comment in the **Description** field and flag the **Print Description** box:



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

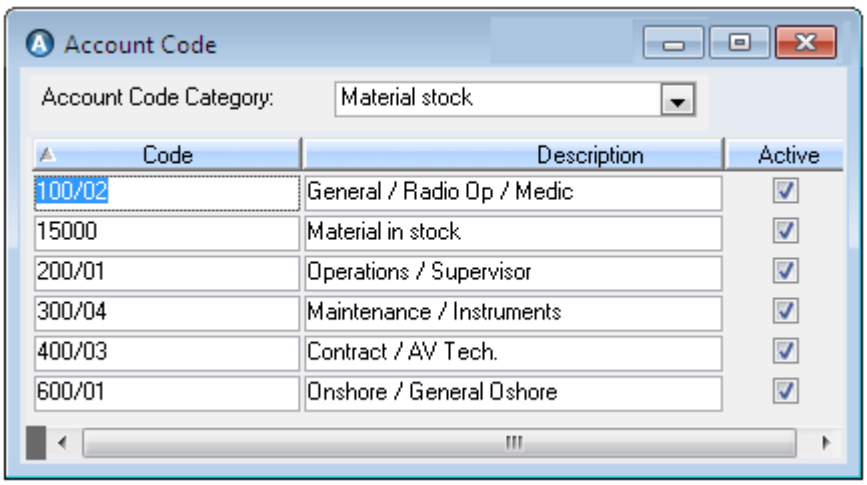
Read about applying and using stock grades on stock and order forms in the *AMOS Business Suite M&P User Guide*.

Account Codes

File > Open Register > General > Accounting > Account Codes

This register is for listing the Account Code available on purchase forms. Account codes provide an alternate method of expense reporting to the budget system.

To create categories to group account codes into, see "Account Code Categories" on page 67.



Audit Trail Reason

File > Open Register > General > Audit Trail Reason

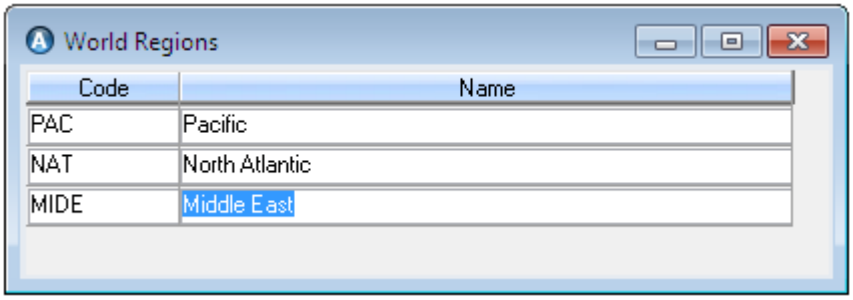
When an audit trail has been placed on a field, depending on how the trail was configured any user who changes the field might be prompted to give a reason for the change. These reasons can be free-text, or pre-defined here in this register: for example, 'Inventory Control' or 'Maintenance Adjustments'.

Flag the **Active** box on every reason you want to be available for selection.

World Regions

File > Open Register > General > World Regions

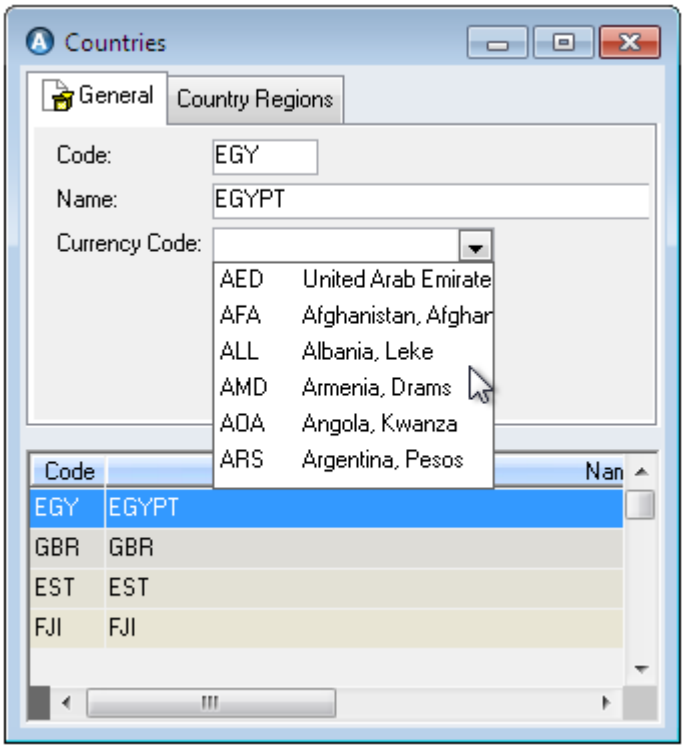
World regions listed here are used in the Ports register.



Countries

File > Open Register > General > Countries

List country **Names** and **Codes** in this register. You can also assign a **Currency Code** to any country in the list.

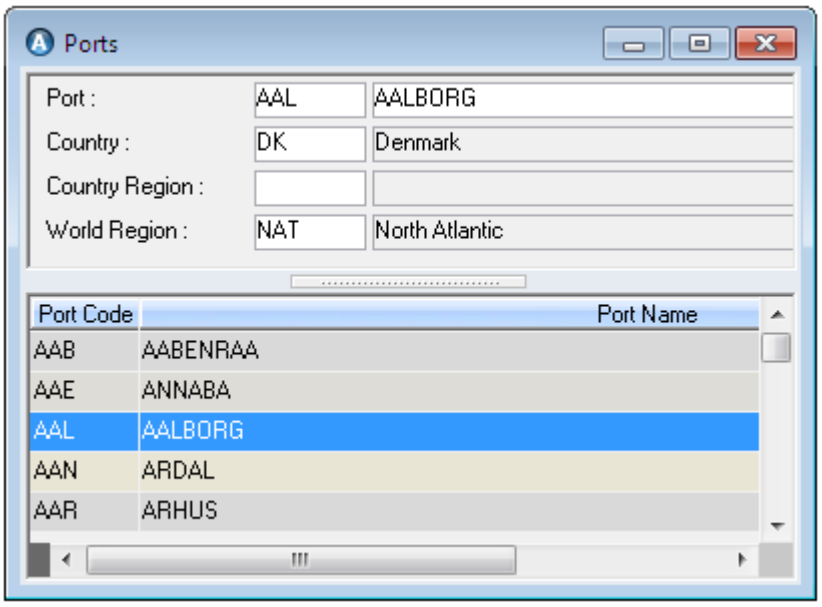


To divide a country into 'regions', select it in the list and open the Country Regions tab. Click the **New** button and enter a region like a state or an area.

Ports

File > Open Register > General > Ports

List the ports that your company vessels visit. This register draws information from the Countries register and World Regions register so make sure those registers are populated first.

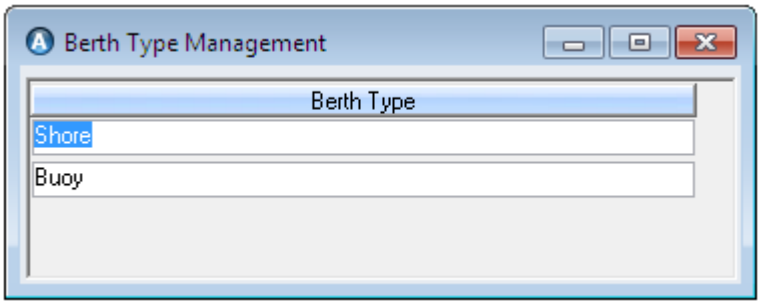


Select a port in the list and go to **Options > Berth Management** to open a secondary register where you can lookup and select a **Berth Type**. This requires a list of available types in the Berth Type register.

Berth Type

File > Open Register > General > Berth Type

List the types of berths for mooring vessels, like 'Offshore Buoy', 'Refuelling Pier', 'Container Wharf' and so on. The codes are used in the Berth Management register.



M&P Registers

Registers containing information specific to AMOS Business Suite Maintenance, Stock and Purchase modules are grouped here.

Job Descriptions

File > Open Register > Maintenance > Job Descriptions

Every job defined in the system needs a Job Description. The appearance of this register changes according to the system parameter 'Job Description Revision Control'. Set to TRUE, you can create mul-

tiple versions of each job description. Before you can define any job descriptions, make sure you have a list of job classes defined in the Job Classes register.

How you add job descriptions depends on the setting of the 'Job Description Revision control parameter.

» If the parameter is set to FALSE:

1. Click **New** on the toolbar.
2. Enter a **Code**, **Title** and select a **Class**.
3. **Save** the entry and go to **Options > Details...** .
4. Enter the job's description in the Full Description window and click **OK**.

   If a template is in use fields and formatting might be present in the description window.
5. **Save** the register.

» If the parameter is set to TRUE:

1. Click **New** on the toolbar.
2. Enter a **Code** and select a **Class**.
3. Open the Revisions tab and enter a **Title** there.
4. Click **Save** and return to the General tab where the title will now appear.
5. Go to **Options > Details...** or click the **Details** button in the Revisions tab.
6. Enter the job's description in the Full Description window and click **OK**.

   If a template is in use fields and formatting might be present in the description window.
7. **Save** the register. Activate the revision for use.

Activating and Revising Job Descriptions

Your new description revision is probably created with the status 'Draft'. This means you need to activate it to use it:

1. Select the job description and open the Revisions tab.
2. Select the draft revision and click **Approve**. The Status changes to 'Active'.

Once activated, you can't make any more changes to a job description. It's also no longer possible to **Delete** an active job description. To change it, make a new revision:

1. Select the job description and open the Revisions tab.
2. Click the **New** button inside the tab.
3. This creates a new draft version.
4. With the draft selected, go to **Options > Details...** or click the **Details** button.
5. Change the description text and click **OK**.
6. **Save** the register. When it's ready, click **Approve** to activate the draft. This changes its **Status** to 'Active' and sets the previously active version to 'Obsolete'.

To create a copy of an existing active job, go to **Options > Copy Job Description**. The copy is named 'Copy <Original Job Description>' with a draft revision. Edit the details and activate the new draft.

It's also possible to modify the **Job Class** on a draft revision of a job description, if you have access to 'Job Description; Draft Revision Job Class', which only applies when the system parameter 'Job Description Revision Control' is set to TRUE.

If you change the job class on a job description revision, a user without access to the new class could appear to have created work orders based on the job description. If changing the job class will result in a change to job class access, you will be notified before continuing with the change.

Here are some other things you can do with job description revisions:

- Click the **Attachment** button or go to **Options > Attachments** to add files to the job description. Attachments appear with the description wherever it is used: for example, on Maintenance Work Orders, view attachment(s) by selecting **Options > Job Description Attachments**.
- Click the **Permits** button or go to **Options > Permits to Work**, to link any required permits to the job description. Permits are automatically attached to all new work orders for the job description, and are issued and acknowledged in the work orders window.
- Select a revision in the list and click the **Compare** button. A dialog opens where you can select any other revision of the same job to compare the descriptions in a Word document.

Used in Component(s)/Types

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

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

Select **Options > Components** to opens the Components window for the job.

Select a job description and go to **Options > Create Component/Type Job** to choose a component/type and create a new job for it on the spot.

Moving Job References

To replace all occurrences of one job description with another one:

1. Select a job description you want to replace with another one, and go to **Options > Move Job References...**.
2. In the dialog that opens choose a job description.

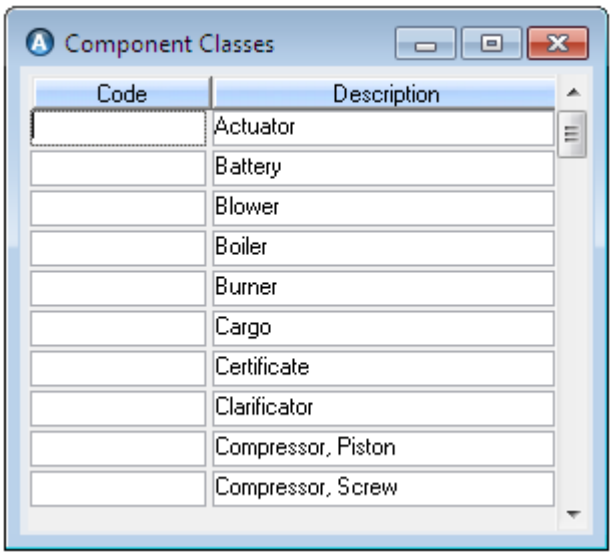
   If you click **All References** and then click **Finish**, the job in this dialog will replace the job description you selected first, everywhere that first job appears in the system.

   Or, click **Selected Components** and then click **Next**. You will see a list of components (followed by a list of component types) where the first job is in use. When you flag some component(s)/type(s) and then **Finish**, the job in this dialog will replace the job description you selected first, on all flagged component(s)/type(s).

Component Classes

File > Open Register > Maintenance > Component Classes

Define a list of classes for grouping components into. Assign components to these classes in the Component Types window.



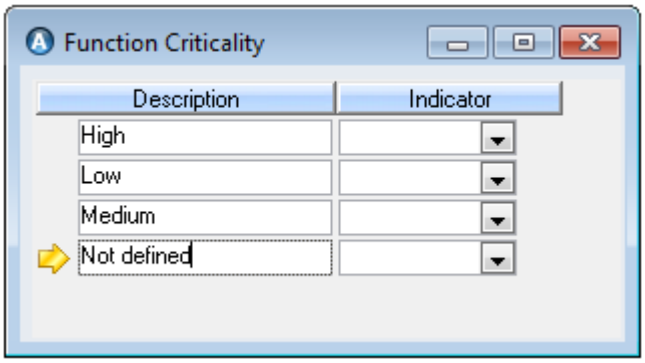
Function Criticality and Indicators

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

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

Define the available criticality values in the Function Criticality register:

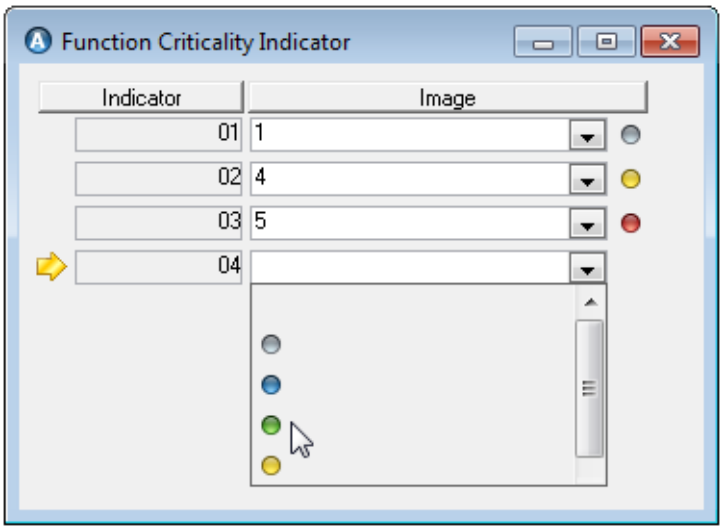
1. Go to **File > Open Register > Maintenance > Function Criticality** and define the levels, such as High, Low, Medium, etc:



2. **Save** the register.

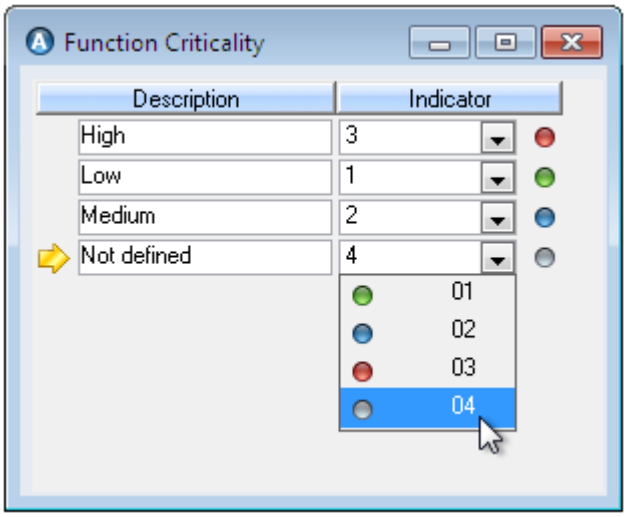
To visibly differentiate between these function criticality levels, assign a graphical indicator to each one. First: define the indicators in the Function Criticality Indicator register:

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



You can register up to 15 indicators.

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

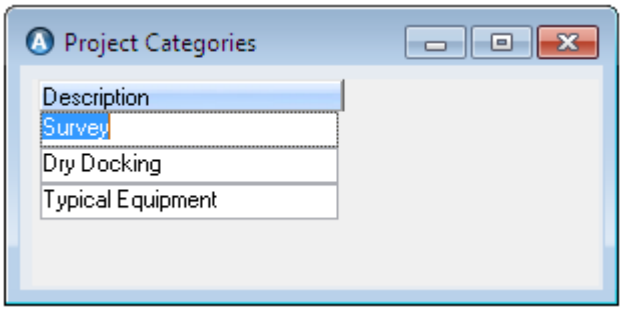


When a criticality level is applied in the Function/Function Hierarchy window, the corresponding image will appear next to the selected function in the list/hierarchy.

Project Categories

File > Open Register > Maintenance > Project Categories

Define a list of categories for grouping maintenance projects into.



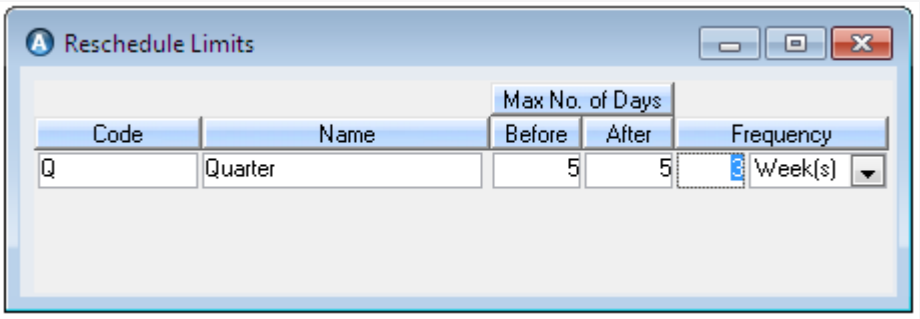
Reschedule Limits

File > Open Register > Maintenance > Reschedule Limits

A 'Reschedule Limit' is a set amount of days before and after the calculated due date within which a Maintenance Task can be rescheduled and still carried out on time.

EXAMPLE

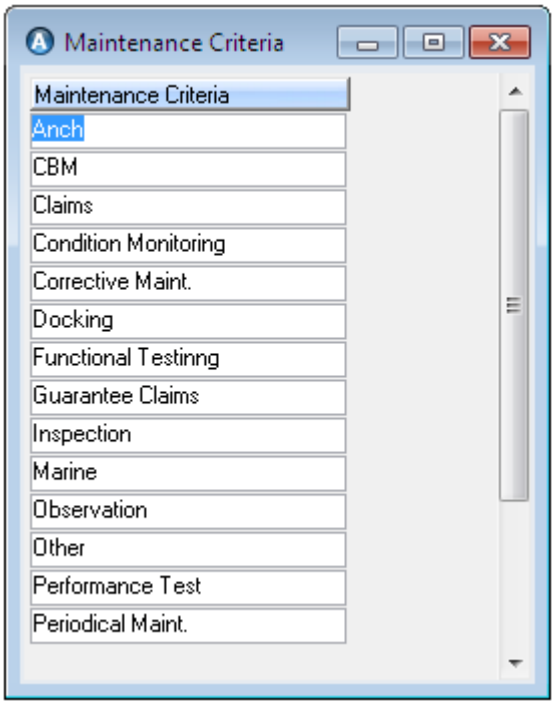
You create a reschedule limit called 'Quarter' with a frequency of three months and a maximum of five days on either side. Any maintenance task based on this periodic frequency can be rescheduled within five days before or after its original due date.



(Maintenance) Criteria

File > Open Register > Maintenance > Criteria

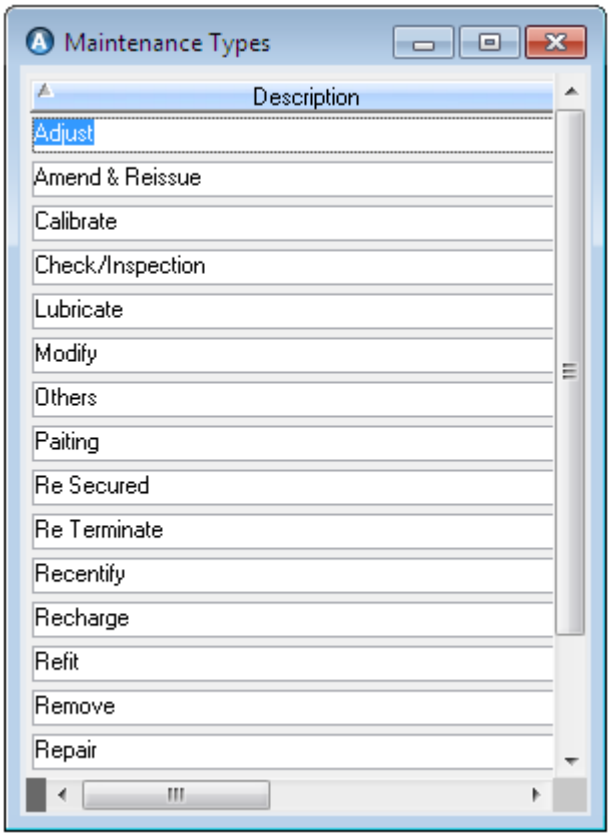
Define a list of maintenance criteria like 'Observation', 'Functional Testing', 'Periodical Maintenance' and so on. These criteria will be available for assigning to Component/Type Jobs and useful for filtering maintenance work orders by.



(Maintenance) Types

File > Open Register > Maintenance > Types

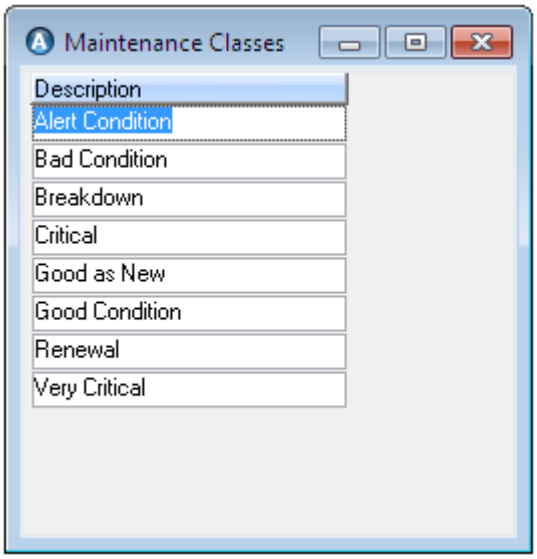
Define a list of maintenance types like 'Calibrate', 'Refit', 'Repair' and so on. These types will be available for assigning to Component/Type Jobs and useful for filtering maintenance work orders by. You can also link each maintenance type to a default budget code.



(Maintenance) Classes

File > Open Register > Maintenance > Classes

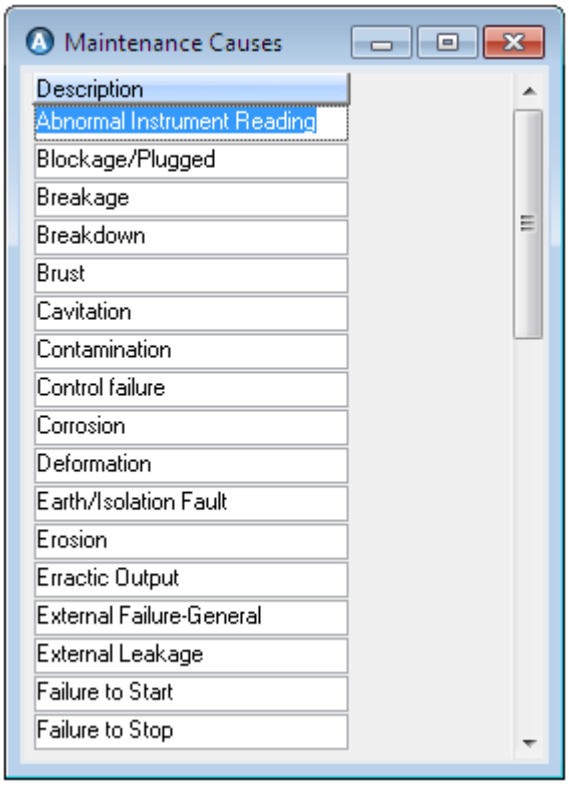
Define a list of maintenance classes like 'Critical', 'Renewal', 'Good Condition' and so on. These classes will be available for assigning to Component/Type Jobs and useful for filtering maintenance work orders by.



(Maintenance) Causes

File > Open Register > Maintenance > Causes

Define a list of maintenance causes like 'Contamination', 'Erosion', 'Breakdown' and so on. These causes will be available for assigning to Component/Type Jobs and useful for filtering maintenance work orders by.



Failure Modes

File > Open Register > Maintenance > Failure Modes

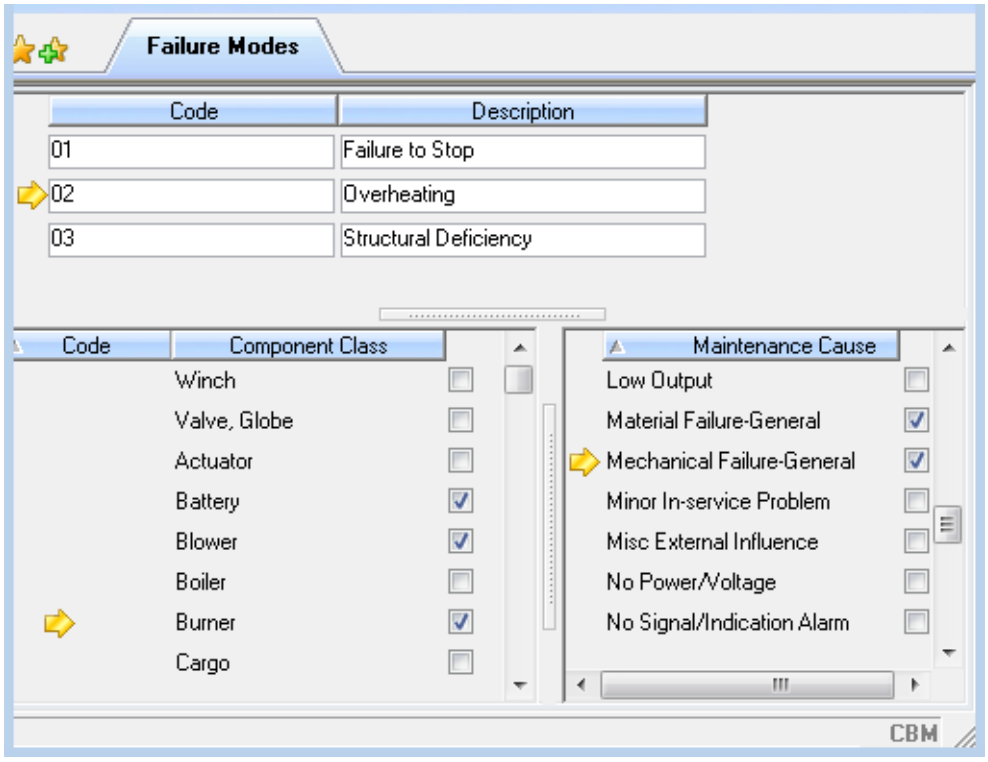
Failure Modes are things that can go wrong with a piece of equipment, and cause it to fail, like 'Failure to Stop', 'Overheating', 'Structural Deficiency', 'Deviation', and so on. When a piece of equipment fails, a user will probably make a requisition work order to handle the repairs. To make entering failure-related information on requisitions easier:

- **Link failure modes to component classes**. When a user selects a failed component on a requisition and filters for a failure mode to assign, the list of available modes is restricted to the ones linked to the class the component belongs to.

  Select a failure mode entry in the top of the register and flag any **Component Class(es)** it applies to.

- **Link failure modes to maintenance causes**. This provides a reason for why the failure mode occurred.

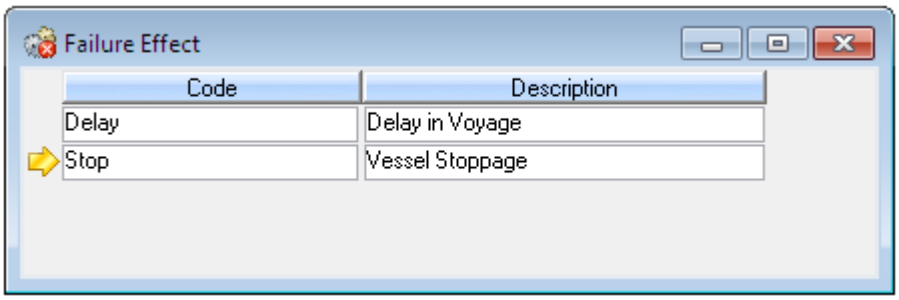
  Select a failure mode entry in the top of the register and flag any **Maintenance Cause(s)** which apply.



Failure Effects

File > Open Register > Maintenance > Failure Effects

Define a list of effects that a particular equipment failure could have on a vessel or voyage like 'Delay in Voyage', 'Delay in Operations', 'Vessel Stoppage', and so on.



Failure Descriptors

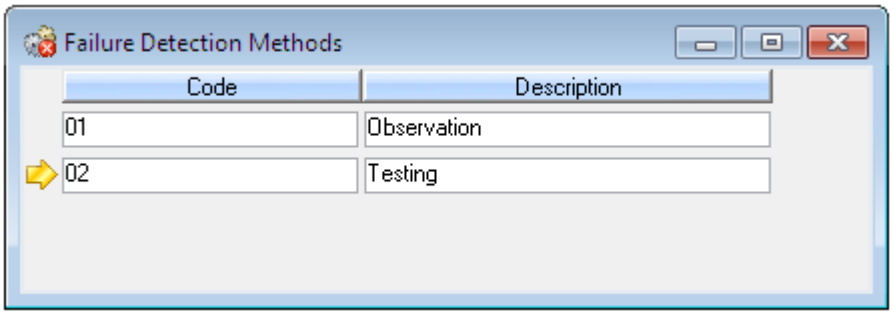
File > Open Register > Maintenance > Failure Descriptors

Define a list of apparent and observed causes of equipment failures. The failure causes listed here can later be registered against work orders and requisitions in case of equipment failures, for reporting on and analysing failures as they occur.

Failure Detection Methods

File > Open Register > Maintenance > Failure Methods

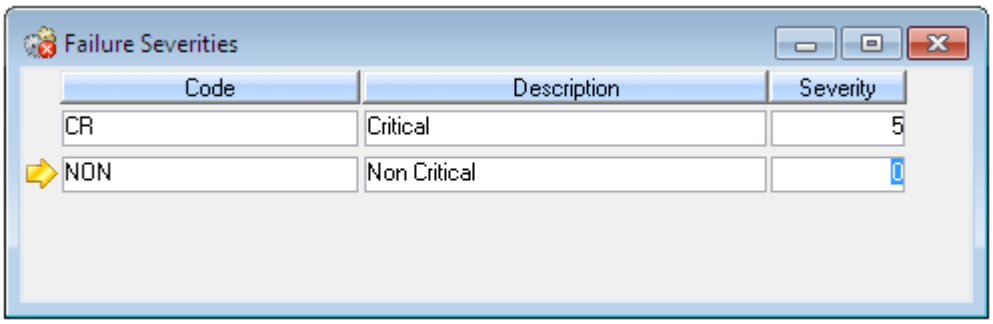
For use with work orders and requisitions created as a result of equipment failure, create a list here of ways in which equipment failure is noticed, such as by 'Observation', 'Testing', 'Continuous Condition Monitoring' and so on.



Failure Severity

File > Open Register > Maintenance > Failure Severity

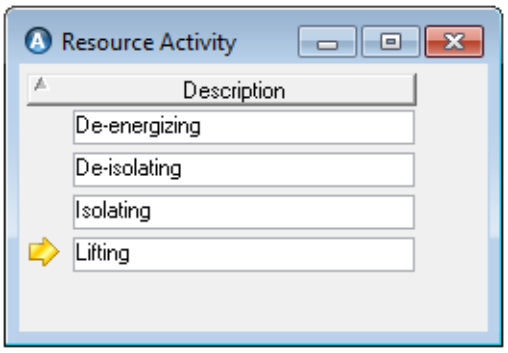
Different failure modes effect the same piece of equipment in different ways. Depending on the failure, the equipment may or may not continue functioning. Create a list of severity values, such as 'Critical Failure', 'Non Critical Failure' and so on.



Resource Activity

File > Open Register > Maintenance > Resource Activity

Define a list of available activities a resource could carry out as part of a job:



These activities become available for selection in the Required Disciplines tab on the disciplines listed for component/type jobs, when the system parameter 'Extended Resource Registration'[1] is set to TRUE.

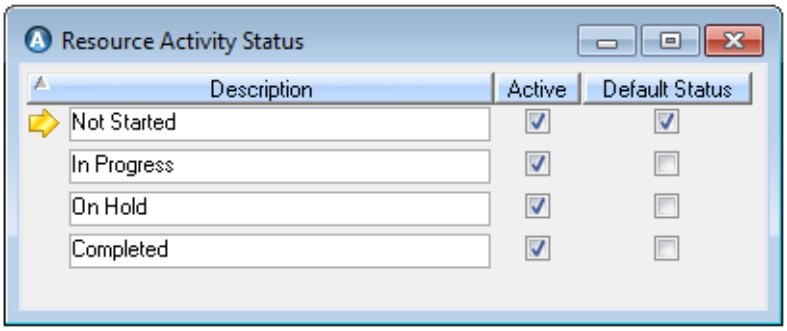
Resource Activity Status

File > Open Register > Maintenance > Resource Activity Status

When the 'Extended Resource Registration' system parameter is set to TRUE users can add extra information to the Component/Type Jobs > Required Disciplines tab, including the number of individual resources and hours needed for each discipline and specific activities they'll be carrying out.

[1] Tools > Configuration > Parameters > Options > Maintenance >

This register is for defining a list of statuses which could be applied to the specific activities a resource would perform as part of a job:



When the 'Extended Resource Registration' parameter is set to TRUE it also adds a **Status** field to the Work Orders window Required Disciplines tab and the Report Work and Maintenance Log windows Resources Used tabs, where the defined statuses will be available for selection.

If you flag any status as 'Default' it will appear automatically with any new discipline added to the Work Orders > Required Parts tab or the Report Work or Maintenance Log > Resources Used tab.

Stock Classes

File > Open Register > Stock > Stock Classes

Define Stock Classes to group stock types/items into.

Receipt Tolerance

Set a maximum percentage of difference between stock quantities on goods received in the **Receipt Tolerance** column. If the goods received quantity falls outside of the permitted tolerance range compared to the order quantity the items cannot be entered into stock.

Stock Classes and Order Form Content

If the system parameter 'Link Stock Class to Order Form Content' is set to TRUE, you can link one 'Order Form Content Description' like Goods, Service Orders, Projects, and so on., to each stock class. It's possible to link the same content description to as many stock classes as it applies.

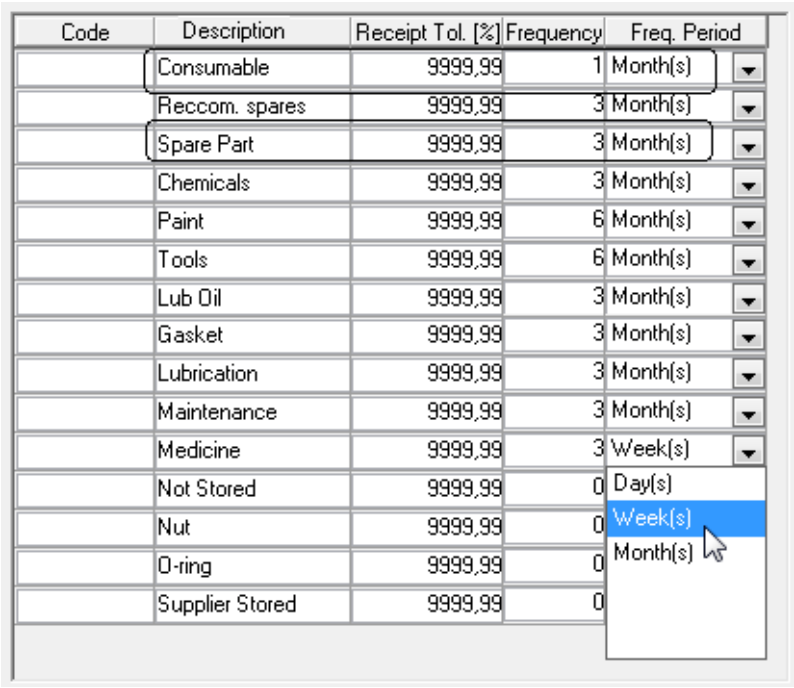
When a user adds a content description to a form, only items belonging to the linked stock classes can be added as line items to that form.; and, all items in all linked stock classes will be grouped onto one form when forms are generated.

See "Order Form Content Descriptions" in the *AMOS M&P User Guide* for details about setting up and applying order form content descriptions.

Stock Classes and Best Purchase Price Periods

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

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

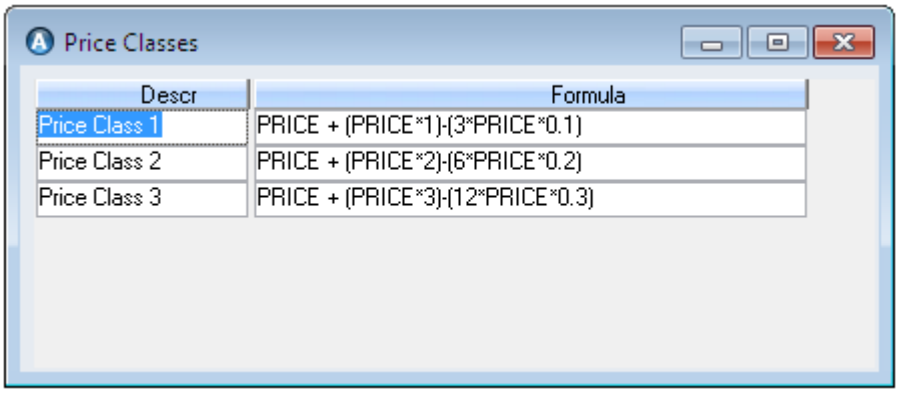


See "Stock - Purchase History" in the AMOS M&P User Guide for details about how to set up and keep track of your purchasing history.

The Price Classes Register

File > Open Register > Stock > Price Classes

Define price classes and a formula for each one, for use on stock item values. Price classes add varying levels of administration or transport costs to an item or reflect different international tax rates.

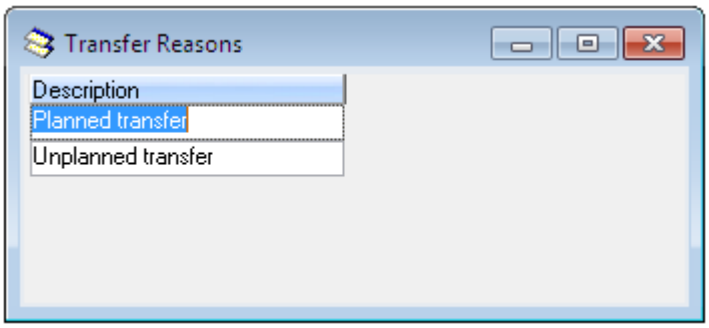


Go to **Options > Try Formula** to check that the formula that you entered for each price class works correctly.

Transfer Reasons

File > Open Register > Stock > Transfer Reasons

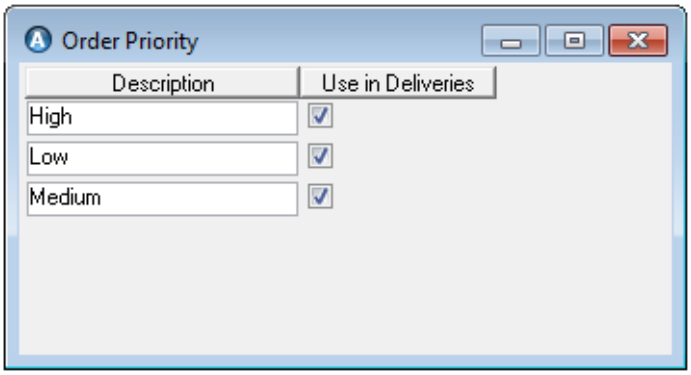
Define a list of reasons that could be applied to a transfer document like 'Planned Transfer' or 'Unplanned Transfer'.



Order Priority

File > Open Register > Purchase > Order Priority

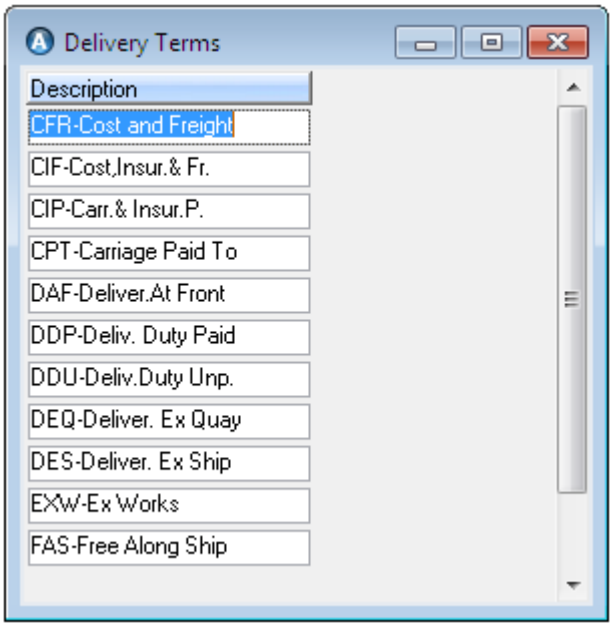
Define levels of priority for applying to purchasing forms. Flag the **Use in Deliveries** checkbox if you want to be able to set the same priority values on deliveries.



Delivery Terms

File > Open Register > Purchase > Delivery Terms

Define a list of delivery terms for us on purchase forms. Select any entry in the list and go to **Options > Details** to add further information if needed.

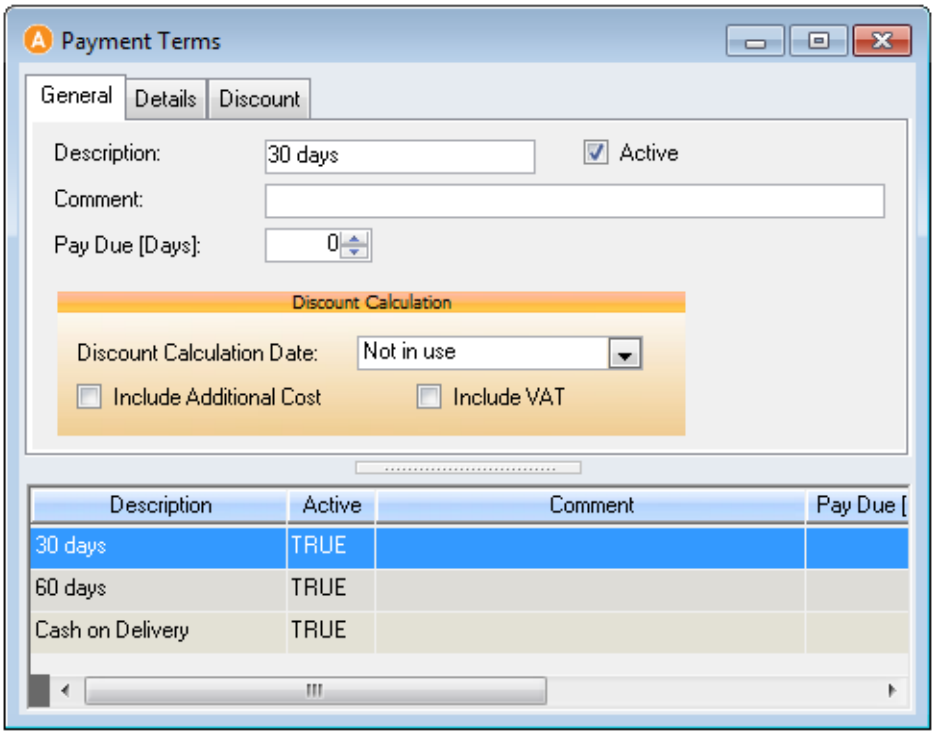


To use a delivery term as the 'default' for a particular vendor, assign it to the vendor's address in the Addresses register. Whenever that vendor is added to a form, or a new purchasing form is generated for the vendor automatically, the delivery term on the address appears on the form too.

Payment Terms

File > Open Register > Purchase > Payment Terms

Define a list of payment terms for us on purchase forms: things like pay in 30 days or 60 days, cash on delivery, and so on:



To use a payment term as the 'default' for a particular vendor, assign it to the vendor's address in the Addresses register. Whenever that vendor is added to a form, the payment term on their address appears on the form too. The 'Active' checkbox is flagged by default; if you unflag it, the payment term will not be available for selection on addresses, order forms and so on.

Discounts on Payment Terms

Vendors usually offer extra discounts when you meet certain agreed payment terms, such as: if you pay an invoice within fifteen days, they'll add an additional 2% discount. If you define how these kinds of discounts are calculated, you can then select a payment term on a voucher in the Voucher window and AMOS will calculate the discount according to the formula here and the date you pay the invoice.

You can define two types of discounts on payment terms:

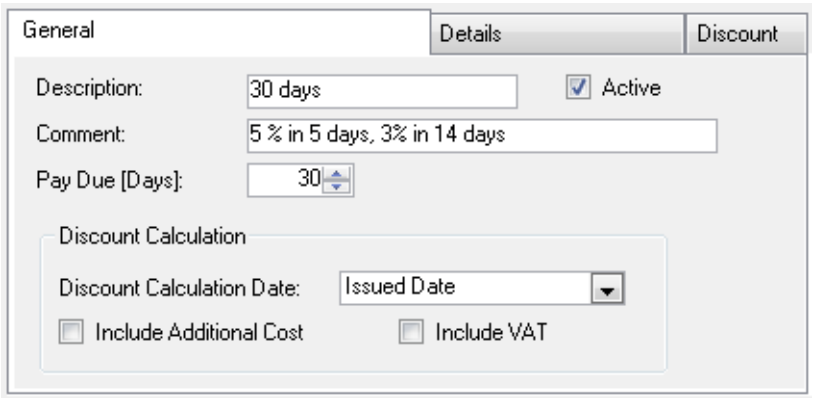
- percentage discounts for paying within a set number of days, and
- 'EOM' discounts for paying within the first set number of days of the next month.

Discounts by Number of Days

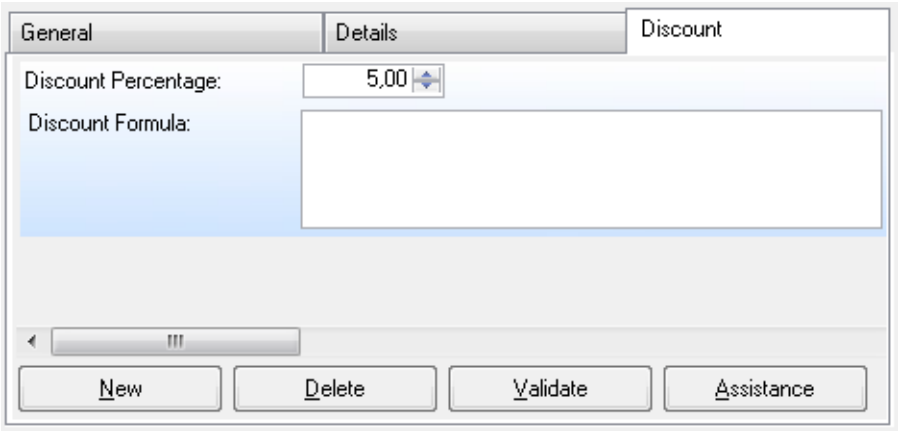
It's possible that a vendor might offer more than one discount on a sliding scale, depending on when you pay by. This is called 'dynamic discounting', and means that you can enter more than one discount on the same payment term.

Let's say you have 30 days to pay an invoice, but you can get a 5% discount if you pay within 5 days of the invoice's 'Issued' date, or a 3% discount if you pay within 14 days:

1. Open the Payment Terms register and click **New**.
2. Enter a **Description** and leave the **Active** checkbox flagged.
3. Enter the number of days within which the invoice must be paid, in the **Pay Due (Days)** field.
4. Select the date to calculate the discount from in the **Discount Calculation Date** field. In this case, 'Issued Date'.
5. Flag the checkboxes if you want this discount to consider also **Additional Costs** and **VAT**. If you don't flag the boxes the discount applies to the total item cost only.



6. Click **Save** and open the Discount tab. Click **New**. Enter the **Discount Percentage**for the first discount:



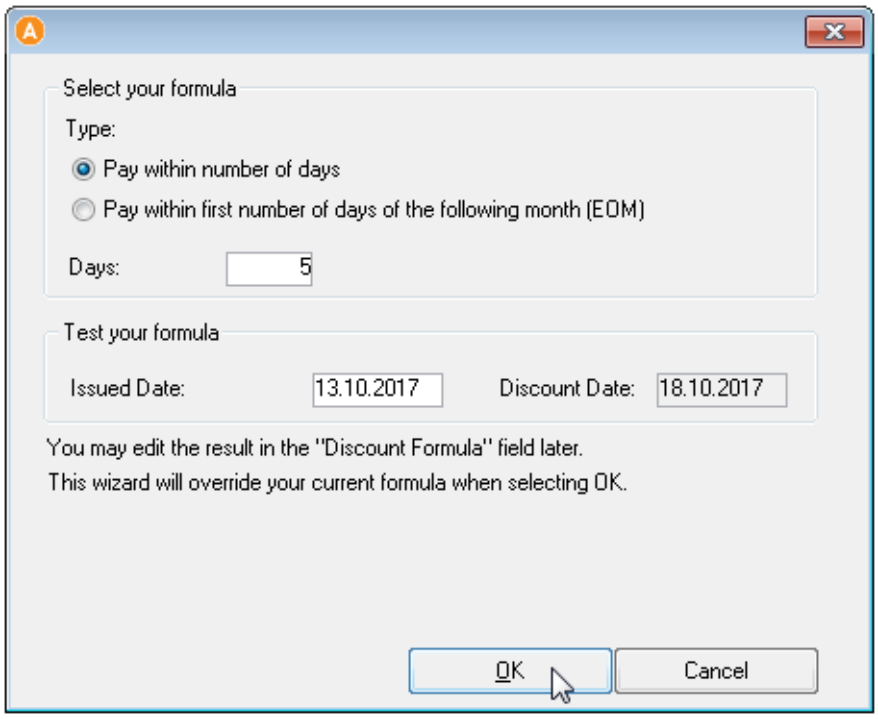
7. Enter a **Discount Formula** that will enable AMOS to make the calculation, for example:

   RelativeDate (#DATE#, 5)

   The keyword #DATE# represents the **Discount Calculation Date** you selected on the General tab. See "Discount Formula Functions" on page 42 for more about defining formulae.

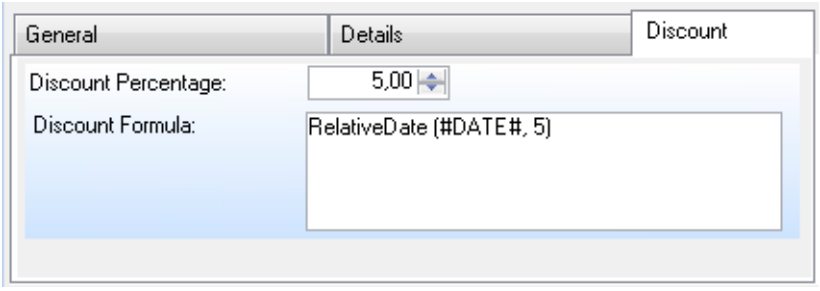
   To make defining a formula easy, click the **Assistance** button to use the wizard:

   - Select the **Type**
   - Enter the number of **Days** to pay within
   - Since you selected 'Issued Date' on the General tab as the date to calculate from, enter the date the invoice was issued here. This calculates the last applicable **Discount Date** for you



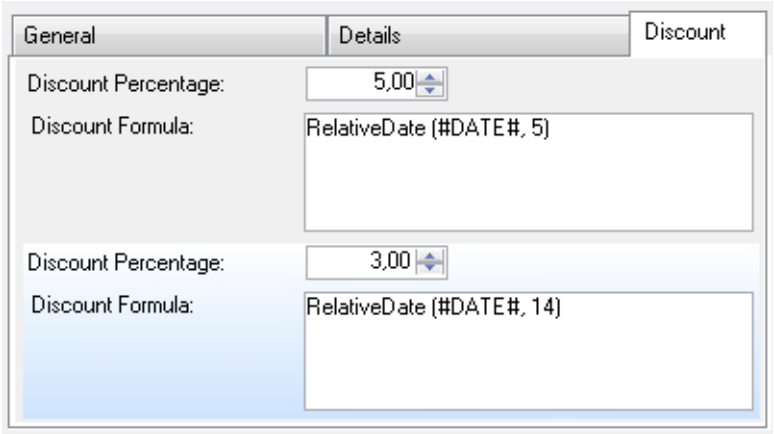
Click **OK**.

8. AMOS will define the formula for you; if you already entered one manually and there are changes, AMOS will overwrite yours:



If you don't use the wizard in the first place, just click **Validate** to check that your formula is correct.

9. In the Discount tab, click **New** again. This time enter 3 in the Discount Percentage field, and define a formula (or use the wizard) for the 14 day discount:



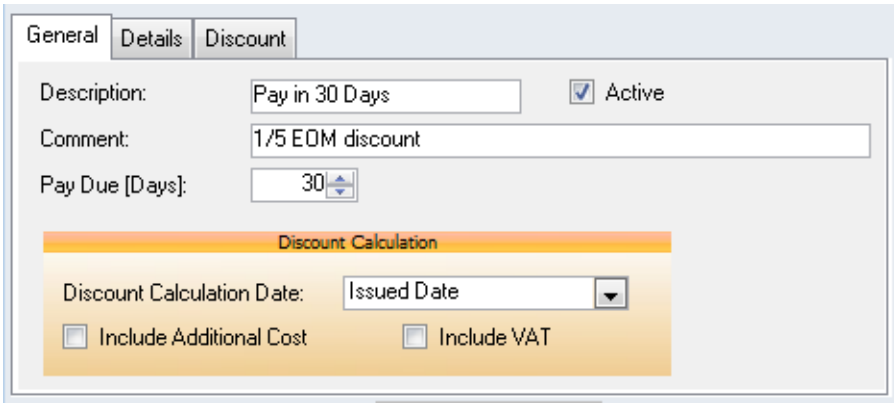
10. **Save** the register.

EOM Discounts

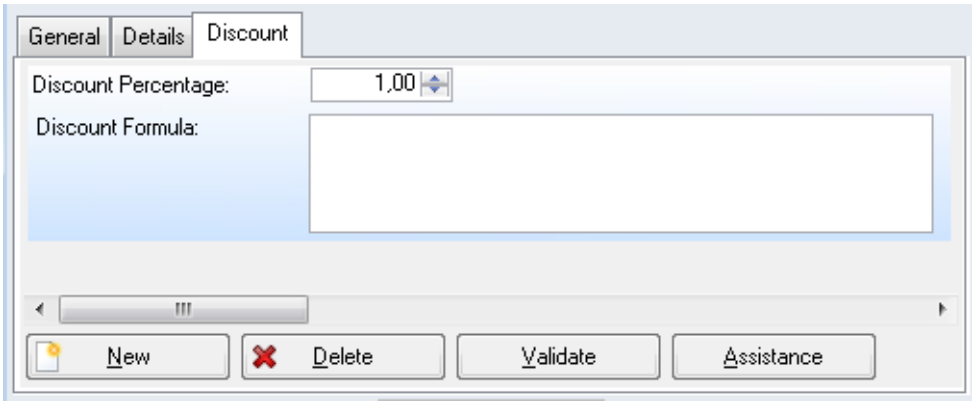
Let's say you have 30 days to pay an invoice, but you can get a '1/5 EOM' discount - that is, a 1% discount for paying within the first 5 days of the next month:

1. Open the Payment Terms register and click **New**.
2. Enter a **Description** and leave the 'Active' checkbox flagged.
3. Enter the number of days within which the invoice must be paid, in the **Pay Due (Days)** field.
4. Select the date to calculate the discount from in the **Discount Calculation Date** field. In this case, 'Issued Date'.
5. Flag the checkboxes if you want this discount to consider also **Additional Costs** and **VAT**.

   If you don't flag the boxes the discount applies to the total item cost only.



6. Click **Save** and open the Discount tab. Click **New**and enter the **Discount Percentage**:



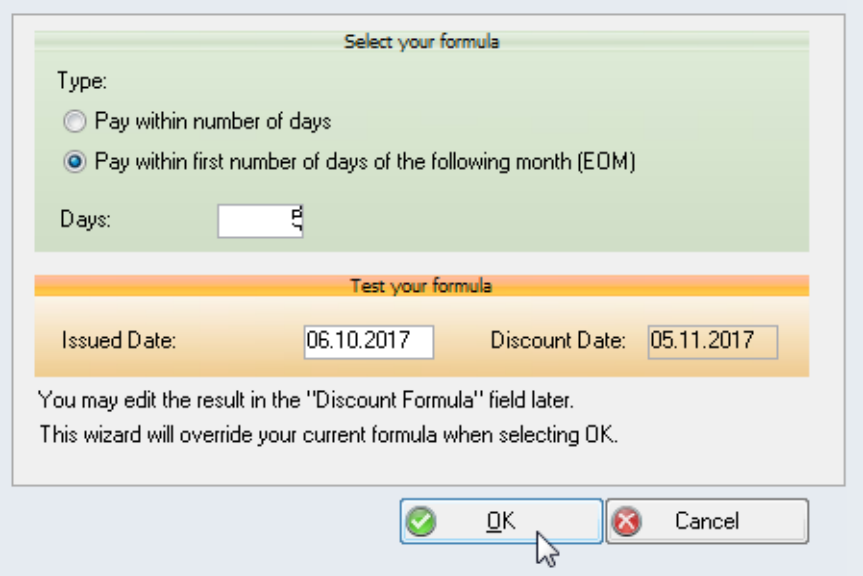
7. Enter a **Discount Formula** that will enable AMOS to make the calculation, for example:

   IF (Month (#DATE#) < 12, Date (Year (#DATE#), Month (#DATE#) +1, 5), Date (Year (#DATE#) +1, 1, 5))

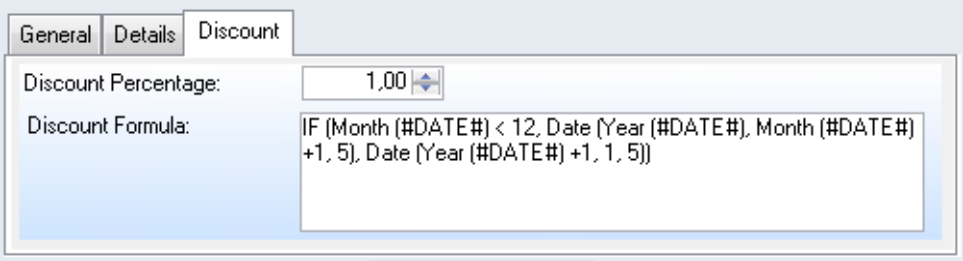
   The keyword #DATE# represents the **Discount Calculation Date** you selected on the General tab. See "Discount Formula Functions" on the next page for more about defining formulae.

   To make defining a formula easy, click the **Assistance** button to use the wizard:

   - Select the **Type**
   - Enter the number of **Days** to pay within
   - Since you selected 'Issued Date' on the General tab as the date to calculate from, enter the date the invoice was issued here. This calculates the last applicable **Discount Date** for you
   - Click **OK**



8. AMOS will define the formula for you; if you already entered one manually and there are changes, AMOS will overwrite yours:



If you don't use the wizard in the first place, just click **Validate** to check that your formula is correct.

9. **Save** the register.

Discount Formula Functions

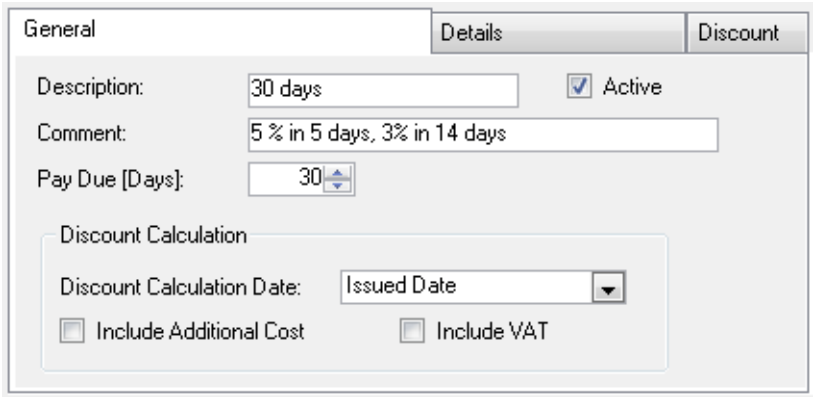
AMOS accepts several functions within discount formulae:

Function	Meaning	Example
Day (<Date>)	Obtains the day of the month as a date value	<Date> a date value, or #DATE# keyword
Month (<Date>)	Determines the month of a date value	<Date> a date value, or #DATE# keyword
Year (<Date>)	Determines the year of a date value	<Date> a date value, or #DATE# keyword
Date (<year>, <month>, <day>)	Combines numbers representing the year, month, and day into a date value	All items are numbers <year> 2017 <month> 05 <day> 17
RelativeDate (<date>, <days>)	Obtains the date that occurs a specified number of days after or before another date	<Date> a date value, or #DATE# keyword <days> number value + or -
Today ()	Obtains the system date	

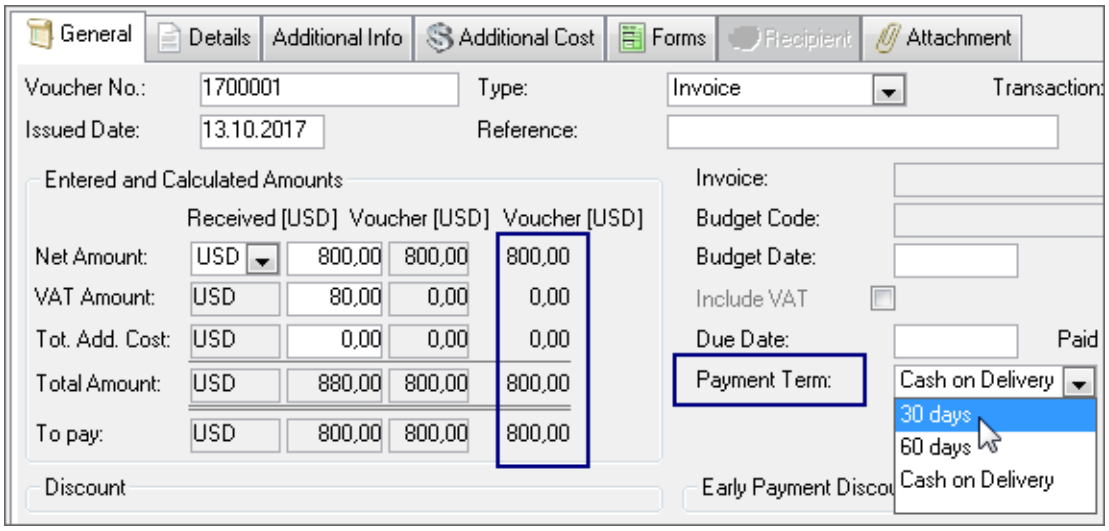
Applying Payment Terms to Vouchers

Onceyou've defined some discounts on payment terms, you can select a payment term on a voucher in the Voucher window and AMOS will calculate the discount according to the formula and the date you pay the invoice.

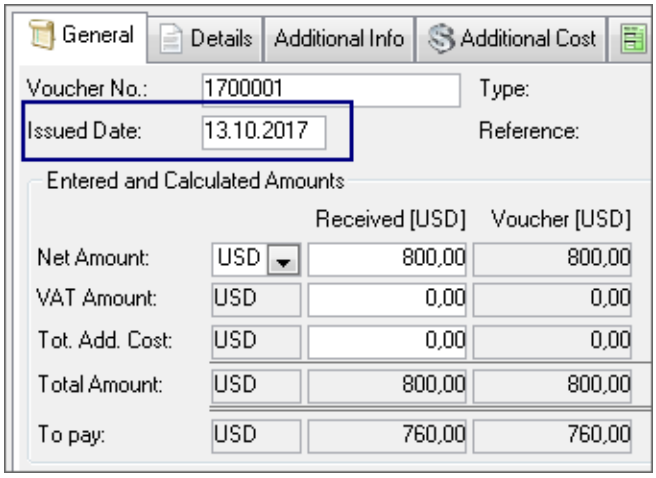
Let's say you have 30 days to pay an invoice, but you can get a 5% discount if you pay within 5 days of the invoice's 'Issued' date, or a 3% discount if you pay within 14 days:



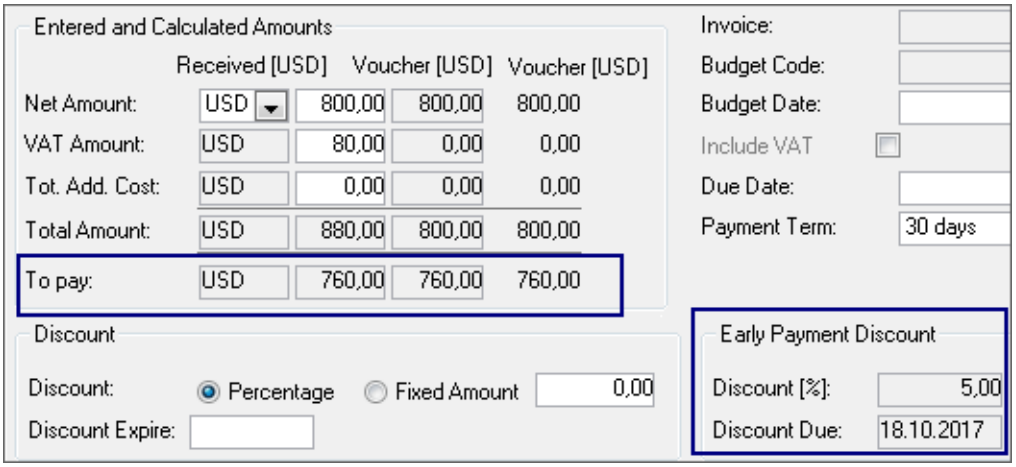
Now, when you apply this payment term to a voucher you have for 800 USD:



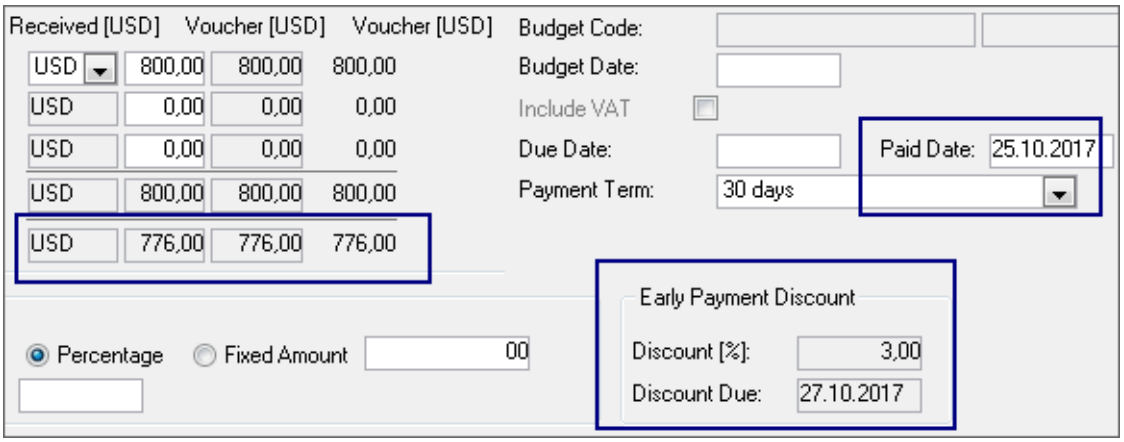
AMOS looks at the **Issued Dat**e - that is, the date the vendor generated the invoice:



And then calculates the due dates to pay within, to meet the conditions for early payment discount. Since the invoice was issued on the 13th, you'll get the 5% discount if you pay by the 18th:



If you don't end up paying the invoice until the 25th, you'll still get the 3% discount:

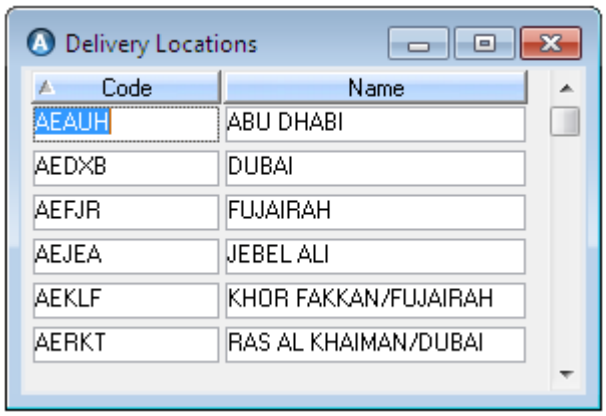


And, you can see that you have until the 27th to qualify for the 14 day/3% discount.

Delivery Locations

File > Open Register > Purchase > Delivery Locations

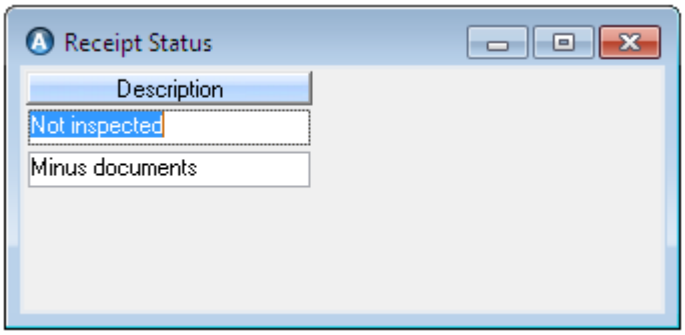
List all possible locations for sending to and receiving deliveries at.



Receipt Status

File > Open Register > Purchase > Receipt Status

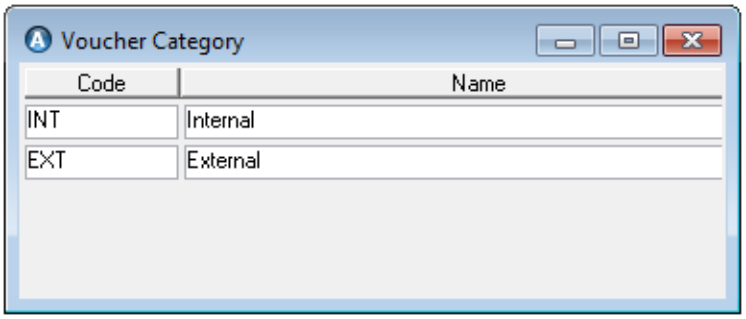
List options for receipt status for use on purchase form line items.



Voucher Category

File > Open Register > Purchase > Voucher Category

Define categories for grouping vouchers.



Expense Type

File > Open Register > Purchase > Expense Type

Define expense categories related to custom clearance contracts, like 'Custom Fees', 'Transportation', 'Duty', 'Airport Storage', and so on.

Finalise Type

File > Open Register > Purchase > Finalise Type

Define finalisation categories for use on custom clearance contracts, like 'Consumed', or 'Asset'.

Order Form Content

File > Open Register > Purchase > Order Form Content

Define a list of content descriptions to apply to purchase order forms to indicate what sort of items the form is for: 'Service Orders', 'Goods', 'Projects', and so on. Actually adding content descriptions to forms requires activating the user-defined field 'orderform.content'. Only descriptions flagged **Active** will be available for selection.

Depending on the setting of a system parameter[1], you can link stock classes to these content descriptions. Then, when a user adds a content description to a form, only items belonging to the linked stock classes can be added as line items to that form.

See "Order Form Content Descriptions" in the *AMOS M&P User Guide* about setting up and applying order form content descriptions.

Order Form Origin

File > Open Register > Purchase > Order Form Origin

Create a list of departmental divisions to apply to purchase forms: such as 'Deck' or 'Engine' inside the Maintenance department. Setting an origin on a form indicates exactly where the form came from and is required by. Only origins flagged as **Active** will be available for selection.

You can assign access to each origin to individual users or groups. This gives those users access to any form specifying one of their assigned origins. It's also possible to link a 'default' origin to a user or a group: then, whenever such a user creates a new form the linked 'default' origin will appear on it automatically.

The **Origin** field will appear on the Line Items window too, if the system parameter 'Origin on Line Item Level' is set to TRUE. Line items will inherit the origin value set on the form header.

See "Where Did This Form Come From? Origin Identification" in the *AMOS M&P User Guide* for more about setting up and applying origins on order forms.

See "Order Form Origin Access" on page 93 about assigning user access to origin values, and setting defaults.

Quotation Compare Item Code

File > Open Register > Purchase > Quotation Compare Item Code

When Quotation Compare Item Codes are available, users can apply them to item/vendor combinations in the Quotation Comparison Scenario window matrix. Applying an item code lets you do things like cancel an item in a certain scenario only, or prevent its price from consideration in the total, without actually affecting the quotation itself.

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

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

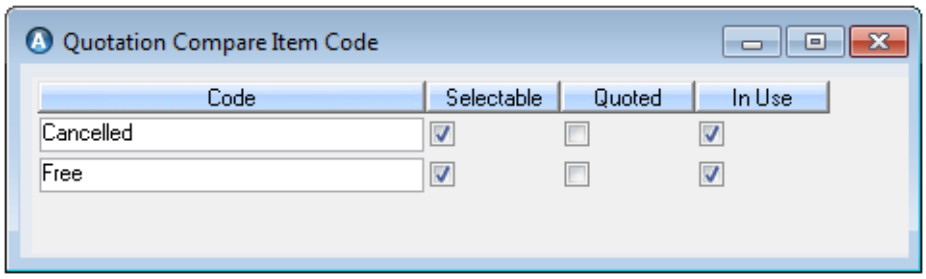
To define codes, click **New** and then enter a **Code** name. Flag the **In Use** checkbox to make the code itself visible and available for use.

Then, consider the other two checkboxes:

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

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

[1] Tools > Configuration > Parameters > Options > Purchase > Link Stock Class to Order Form Content



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

Attachment Registers

You can connect attachments like images and documents, etc., to records in AMOS Business Suite. There are two attachment registers to set up before you can start using attachments:

- Sources. Define internal or external tools for displaying attachments.
- References. Build a library of available attachments.

See "Source and Reference Definition Example" on page 271 for an example of an attachment source and reference defined for an external viewer.

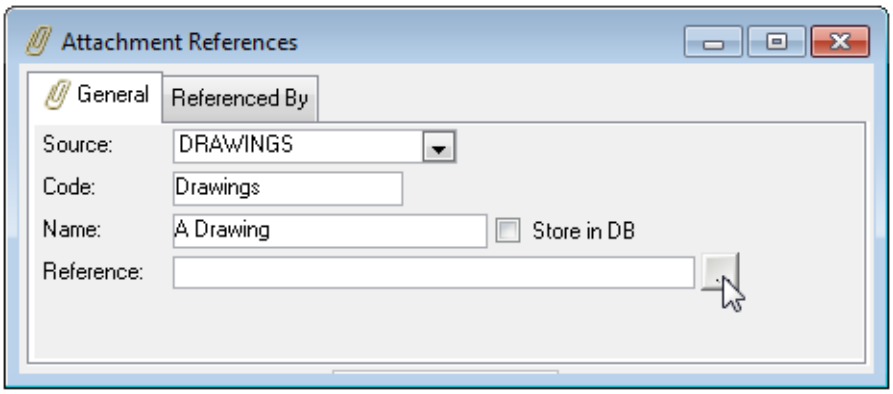
Attachment References

File > Open Register > Attachment > References

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

Adding an Attachment Reference

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



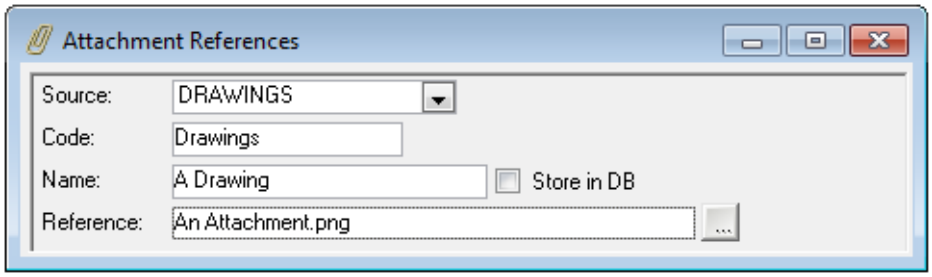
Or go to **Options > Select File...** to locate it.

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

screen in the **Reference** field and **Save** the record. The reference may contain these constants[1]:

- :AMOS_CURRENTDEPTID
- :AMOS_USERID

6. Select a file in the browser and click **Open** to add it.
7. If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[2].
8. **Save** the reference.



To open up and see the file, go to **Options > View Attachment**. To remove it click **Delete**.

Deleting a reference here does not remove the attachment file itself from the Graphics Directory. If the attachment file is no longer connected to any record in AMOS and you want to remove it from the Graphics Directory too, go to **Options > Explore File** or click the toolbar button:

 This opens the file explorer to your Graphics Directory and you can delete the file there.

Once an attachment is linked to a record somewhere in AMOS, its location will show up in the Attachment References window Referenced By tab. Double-clicking an entry or selecting one or more and clicking **View** will open the attachment(s) in the entity window at the record to which it is connected[3].

> **Tip**
>
> See "Source and Reference Definition Example" on page 271 for a sample of an attachment source and reference definition using a DDE command for an external viewer.

Storing Attachments in the Database

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

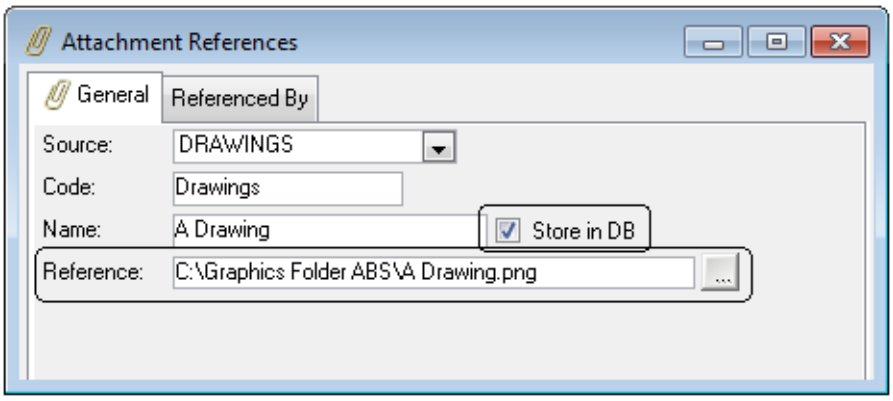
Storing in the database adds the file into your AMOS database and so it will be available to everyone sharing that database. However, this does increase the size of the database, depending on the size and number of attachments.

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

[1] Refer to the documentation for AMOS Titanium for usage of such constants, and other details.

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

[3] Note that depending on the current installation and sharing, records belonging to another installation will open in global search mode.



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

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

Q&S Registers

Registers containing information specific to AMOS Business Suite Quality and Safety and Risk Management modules are grouped here.

Categories

File > Open Register > Quality Procedures > Categories

Create categories for grouping quality procedures into.

Quality Job Descriptions

File > Open Register > Quality Procedures > Job Descriptions

Before you can define any quality job descriptions, make sure you have a list of job classes defined in the Job Classes register.

Create your quality job descriptions in this register:

1. Click **New** on the toolbar.
2. Enter a **Code** and select a **Class**.
3. Open the Revisions tab to enter **a Title** there.
4. Click **Save** and return to the General tab where the title will now appear.
5. Go to **Options > Details...** or click the **Details** button in the Revisions tab.
6. Enter the job's description in the Full Description window and click **OK**.

   If a template is in use fields and formatting might be present in the description window.
7. **Save** the register.

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

Document Templates

File > Open Register > Quality Procedures > Document Templates

Define a list of templates for procedure documents:

1. Click **New**.
2. Enter a **Code** and **Title**.
3. **Save** the entry.
4. Go to **Options > Template**. You get a blank document and can enter a header, footer, and so on for the template.
5. Click **OK** when you're finished and **Save** the window again.

Non Conformity Types

File > Open Register > Non Conformity > Type

Define available types of non-conformities like 'Major Non Conformity', 'Non Conformity' and 'Observation'.

To add non conformity categories to each type:

1. Select a type on the left side.
2. Click the **New** button at the bottom of the right side.
3. Lookup a **Main Category** of non conformity which the selected type could contain. Add more if needed.
4. **Save** the register.

Non Conformity Category

File > Open Register > Non Conformity > Category >

There are two category levels of non-conformity occurrences, **Main** and **Sub**. Each main category can contain multiple sub-categories. Create a structure of main and sub categories to precisely group and define non conformities as they occur.

> **EXAMPLE**
>
> *Main Category*
>
> **Physical**. Non conformities generated in response to physical failures.
>
> *Sub Categories*
>
> **Galley**. Non conformities related to galley equipment.
>
> **Navigation**. Non conformities related to navigation equipment.

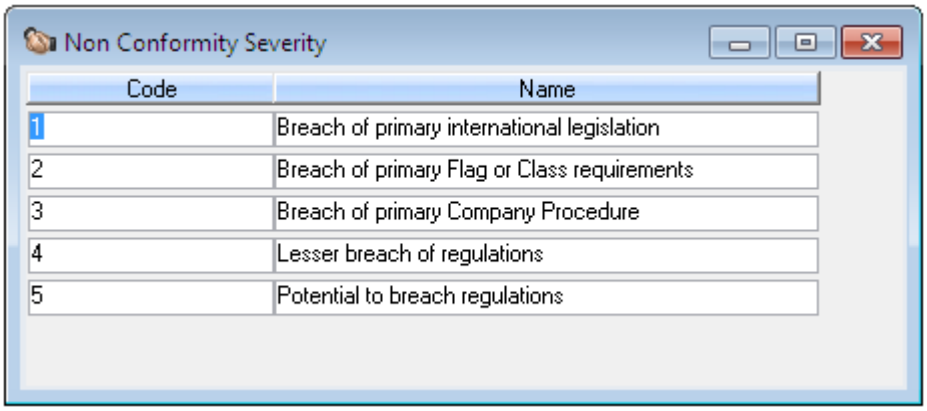
1. First, open the Sub Category register and click **New** to create a list of sub categories.
2. Open the Main Category register and click **New** to add one or more main categories to the list on the left.
3. Select a main category entry and click the **New** button on the bottom right side of the window.
4. Lookup as many sub categories as apply.
5. **Save** the register.

Note: If you have a limited number of vessels, don't define too many different categories. If you do, it will be difficult to use AMOS Q&S to produce significant statistical data during analysis.

Non Conformity Severity

File > Open Register > Non Conformity > Severity

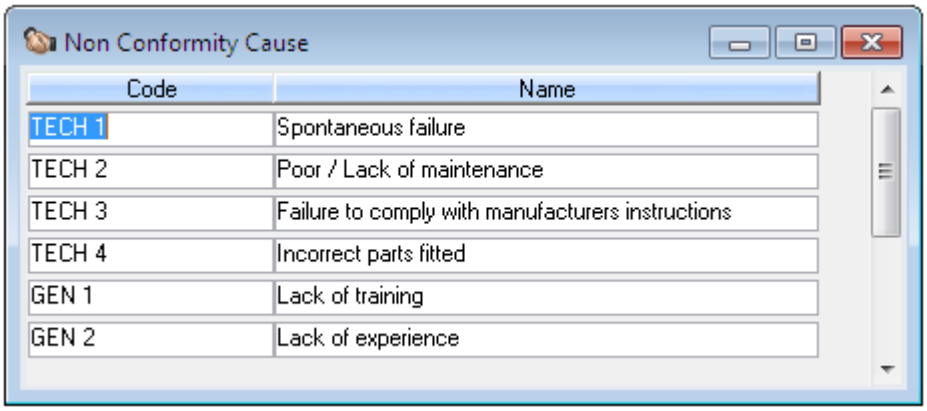
Define a list of severity levels to apply to non conformities.



Non Conformity Cause

File > Open Register > Non Conformity > Cause

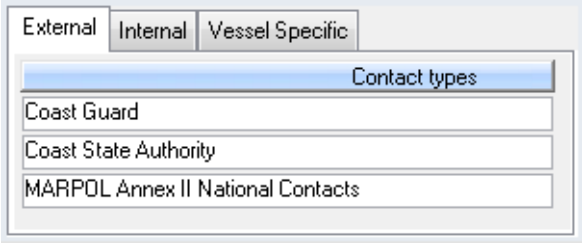
Define a set of causes for non-conformity occurrences.



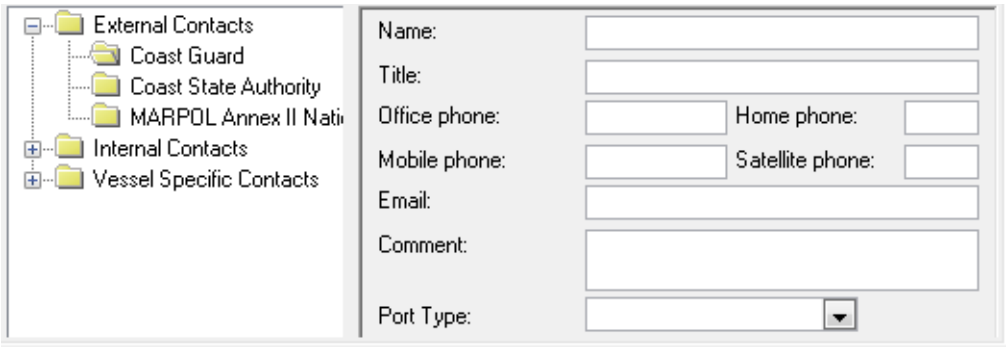
Emergency Response System

File > Open Register > Emergency Response System > Contact Types

Define a list of contact types for use in the ERS module. The contact types are divided into **External**, **Internal** and **Vessel Specific** groups, each in a separate tab:



These three groups of contacts appear as folders in the Emergency Response System window, containing the contact types you define here as sub-folders:



Users can then add individual contact entries or people with details like location and email, etc., to each sub-folder.

Insurance Category

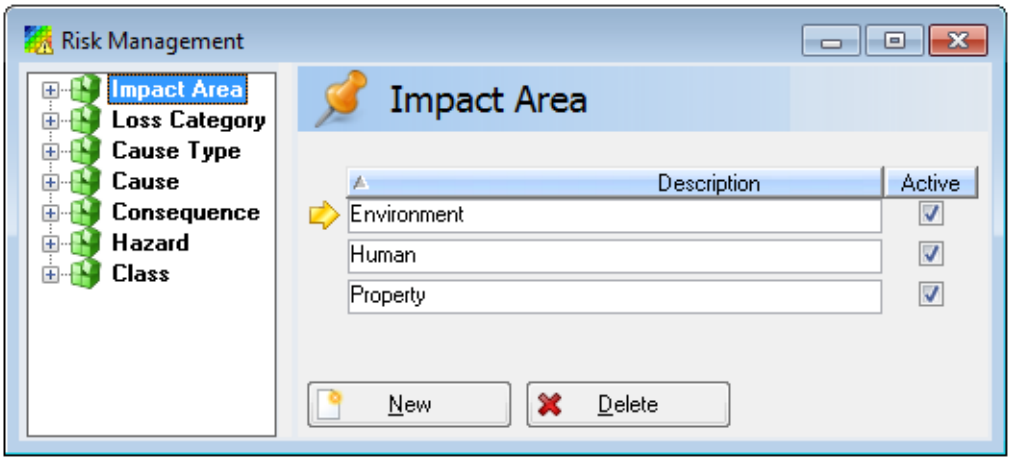
File > Open Register > Claims > Insurance Category

Define a list of insurance categories for grouping insurance policies into in the Insurance window.

Risk Management Registers

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

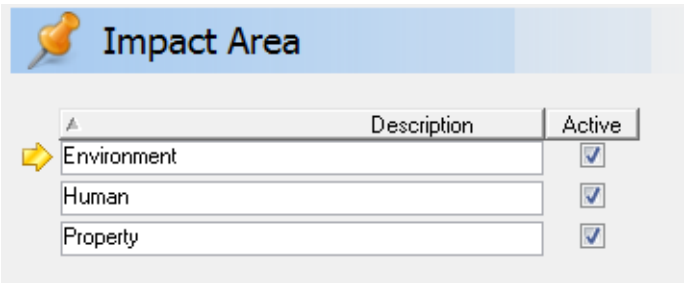
1. Go to **File > Open Register > Risk Management**:



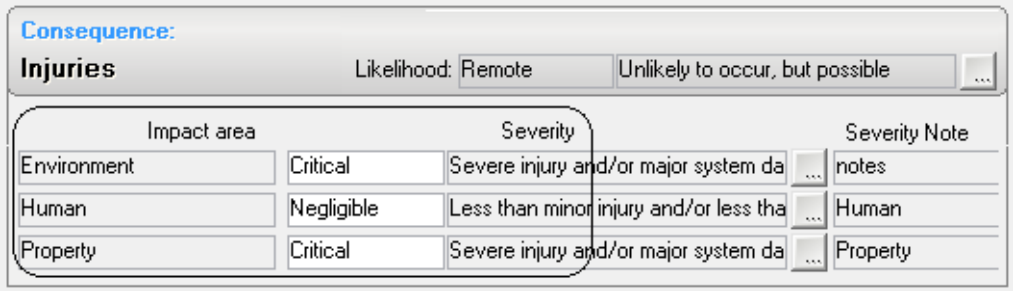
2. Add to any register by selecting it and clicking the **New** button at the bottom of the window.

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:



Hazard

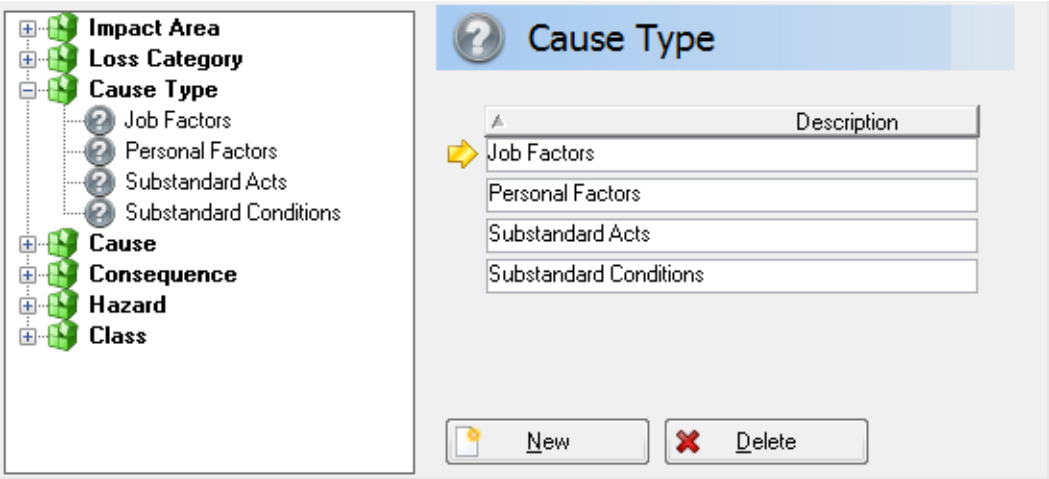
Hazards may occur during a risk scenario: hazards are made up of the actions which *cause* them, and the resulting *consequences*.

> **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.

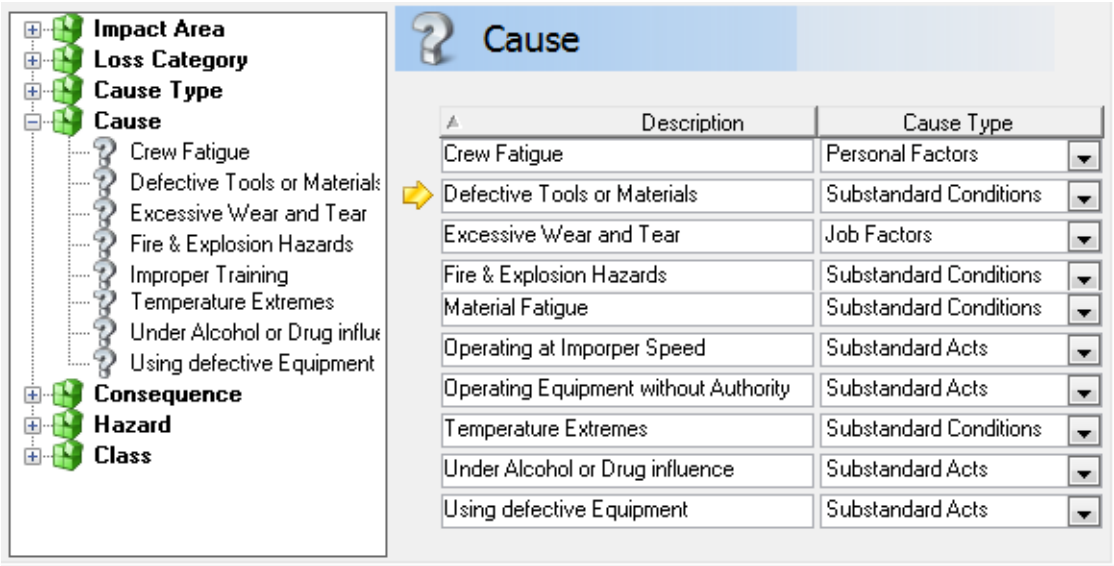
Cause Type

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



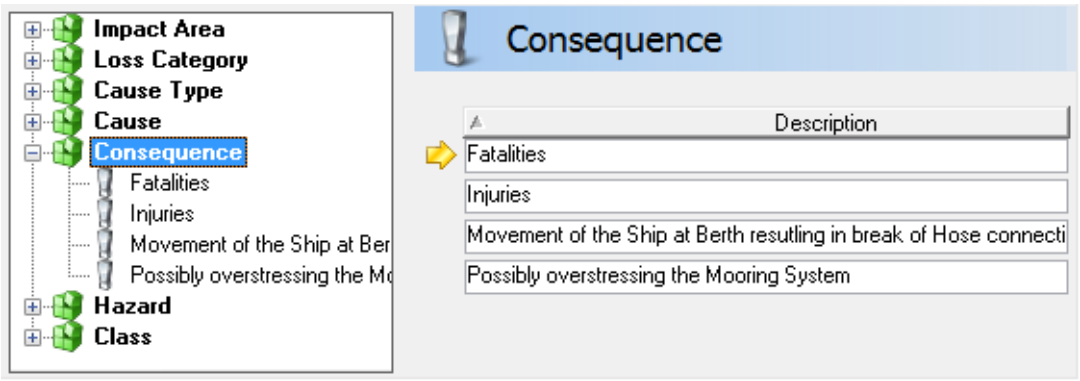
Cause

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



Consequence

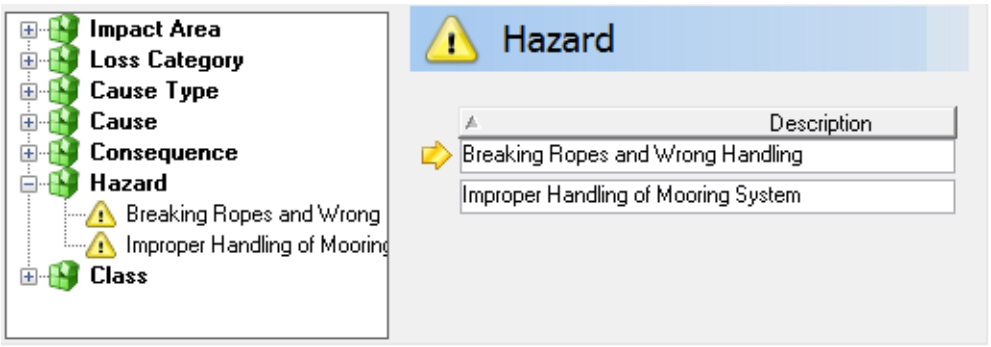
Select the **Consequence** register in the hierarchy and create a list of consequences which could follow if a hazard occurs:



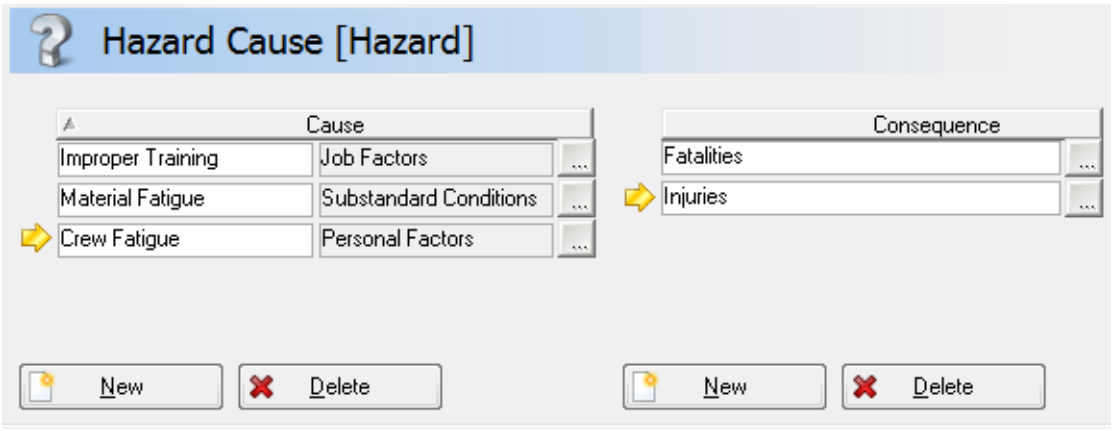
Hazards

Use the information in the registers listed above to define the content for the Hazards register.

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

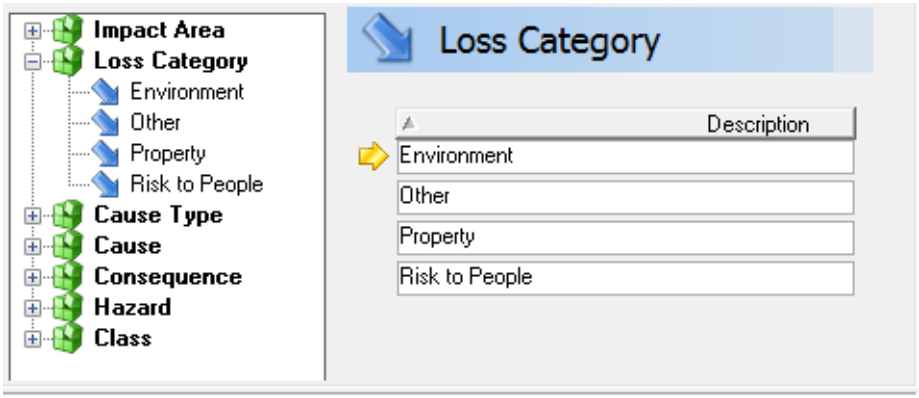


Select a hazard, and click **New** on the bottom left side of the tab to lookup a **Cause**. Click the **New** button on the bottom right side and lookup a **Consequence**. Add as many as you need:



Loss Category

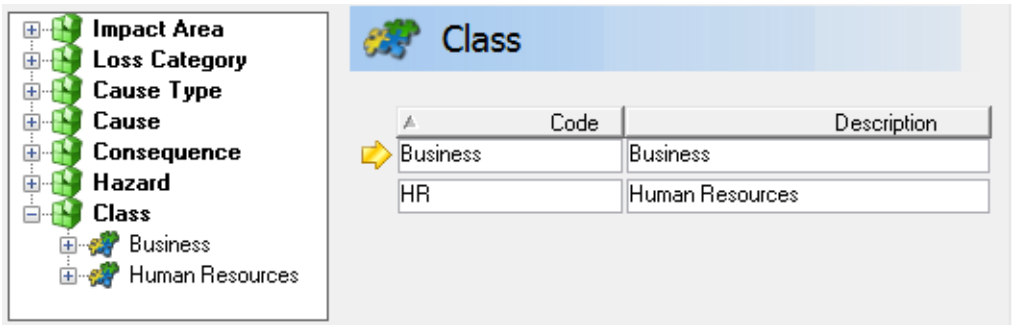
Select the **Loss Category** register in the hierarchy and create a list of categories which could be affected by the consequences of any hazard:



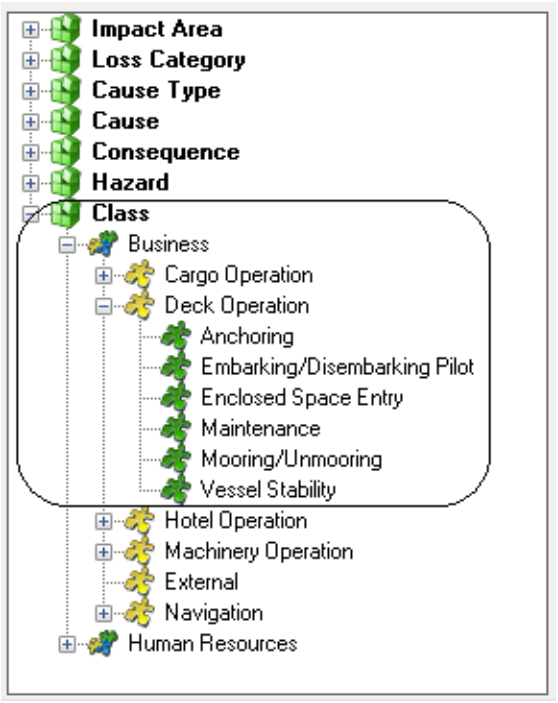
Class

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:


Impact Area
Loss Category
Cause Type
Cause
Consequence
Hazard
Class
Business
Cargo Operation
Deck Operation
Anchoring
Embarking/Disembarking Pilot
Enclosed Space Entry
Maintenance
Mooring/Unmooring
Vessel Stability
Hotel Operation
Machinery Operation
External
Navigation
Human Resources

Voyage Management Registers

Registers containing information specific to AMOS Business Suite Voyage Management module are grouped here.

Cargo Group

File > Open Register > Voyage Management > Cargo Group

Simplify registration and organisation by allocating cargoes to groups.

> **EXAMPLE**
>
> Place cargoes of sand, gravel and stone in a group called 'Dry Bulk', and all types of crude oil cargoes in a group called 'Crude Oil'.

This information is used in the Cargo Type Management and the Events registers.

Cargo Type

File > Open Register > Voyage Managment > Cargo Type

1. Define the types of cargo that your vessels carry.
2. Lookup a **Cargo Group** to assign each type to.
3. **Save** the register.

Cargo Attribute Type

File > Open Register > Voyage Management > Cargo Attribute Type

Specific types of cargoes have their own attributes: one type of crude oil has a defined specific gravity, a fuel oil has a flash point, and so on.

1. Define a list of such attribute types and indicate if its value is a number or text.
2. Then, assign each one to a **Cargo Group**.
3. **Save** the register.

When a cargo group is added to the Cargo Details form, the linked attributes automatically appear on the Attributes tab where the user can then enter the required values for each attribute.

Delay Activity

File > Open Register > Voyage Managment > Delay Activity

Define a list of activities that could occur during a delay in a voyage.

Delay Reason

File > Open Register > Voyage Managment > Delay Reason

Define a list of the reasons for delaying a voyage.

Event Type

File > Open Register > Voyage Management > Event Type

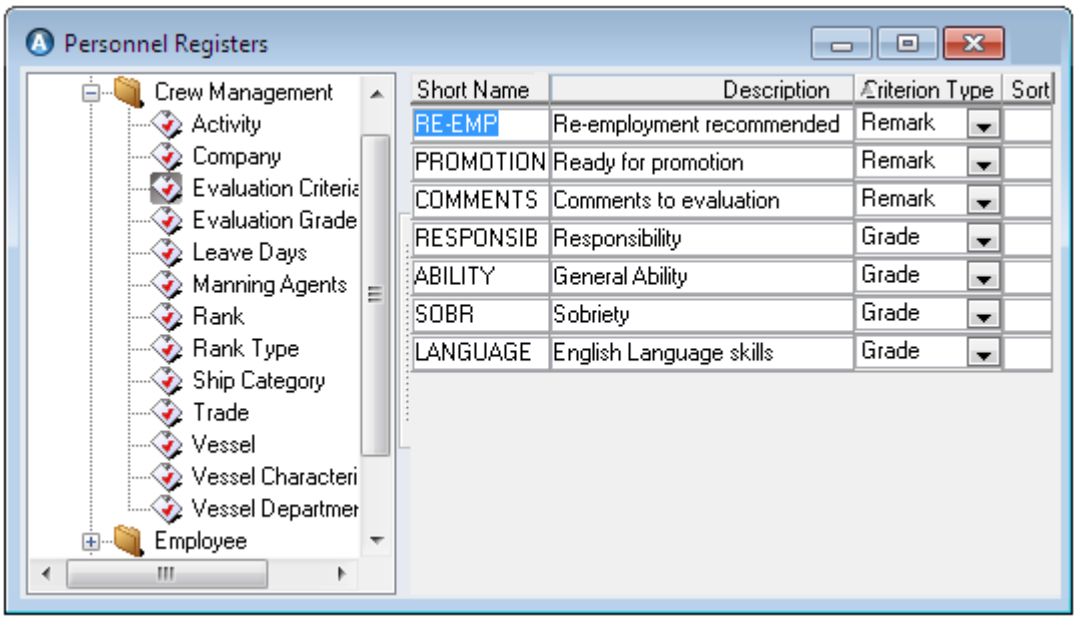
A loading or discharging operation is effectively a series of events like first line ashore, first hose connected, first hatch open, last hatch closed and so on. Some events are mandatory for a particular cargo type, and some are voluntary. Mandatory events can appear in the window automatically in the correct

order when a loading or discharging operation is created. The user then inputs the dates and times when these events occur and saves the data.

1. Define a list of all possible events.
2. Assign each event to a **Cargo Group**.
3. Select whether the event applies to Loading, Discharging, None or Both.
4. To make any event(s) mandatory set the Load or Discharge Sequence values to anything other than 0.
5. **Save** the register.

Personnel Registers

The AMOS Business Suite Personnel module registers are listed in one window, in a hierarchy:



The registers are listed here in the same order as they appear in AMOS.

Crew Management

Activity

File > Open Register > Personnel > Crew Management

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

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

Company

File > Open Register > Personnel > Crew Management

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

Evaluation Criteria

File > Open Register > Personnel > Crew Management

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

Evaluation Grade

File > Open Register > Personnel > Crew Management

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

Leave Days

File > Open Register > Personnel > Crew Management

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

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

Manning Agents

File > Open Register > Personnel > Crew Management

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

Rank

File > Open Register > Personnel > Crew Management

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

Rank Type

File > Open Register > Personnel > Crew Management

This register defines the various types of rank the employees may hold. The rank types are used in the Rank register.

Ship Category

File > Open Register > Personnel > Crew Management

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

Trade

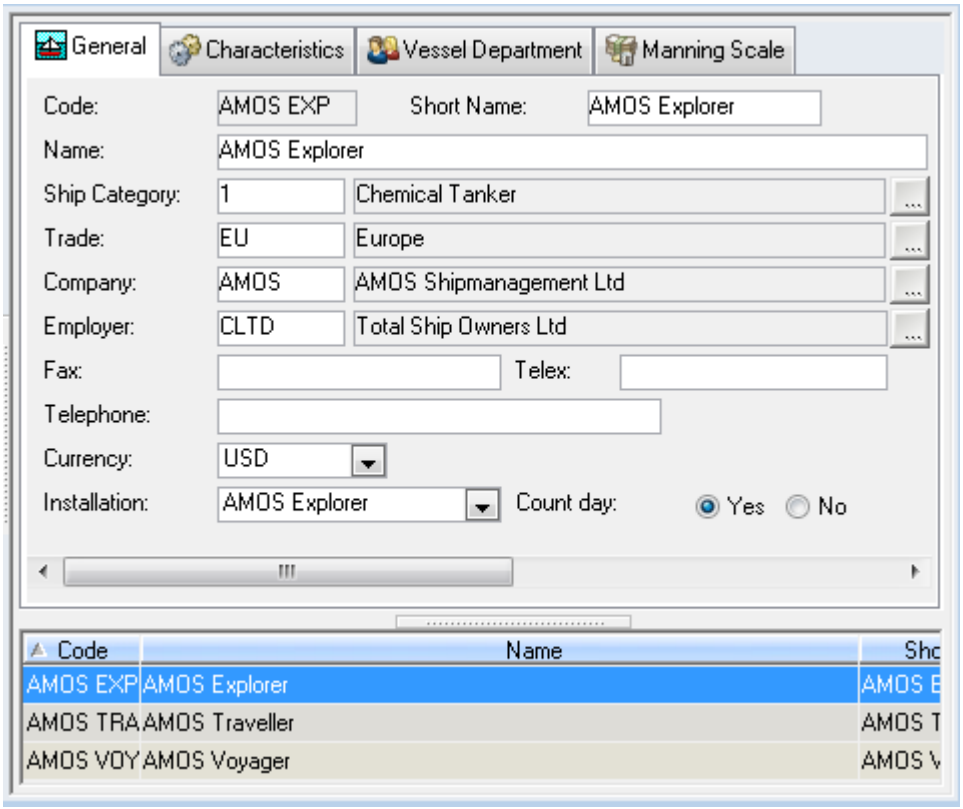
File > Open Register > Personnel > Crew Management

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

Vessel

File > Open Register > Personnel > Crew Management

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



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

- Add details from the Vessel Characteristic Type register, like Nationality, Dimensions, Call Sign and so on, to the Characteristics tab.
- List departments a vessel can be divided into, in the Vessel Department tab.
- Define the number and specialisations of the crew members required to run the vessel, in the Manning Scale tab. The number of personnel normally employed in that position is the normal Operational requirement and the Minimum requirement is the legally justifiable minimum required to run the vessel safely.

Vessel Characteristic Type

File > Open Register > Personnel > Crew Management

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

Vessel Department

File > Open Register > Personnel > Crew Management

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

Employee

Category

File > Open Register > Personnel > Employee

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

Contract Leave Days

File > Open Register > Personnel > Employee

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

Disability Grade

File > Open Register > Personnel > Employee

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

Employee Address Type

File > Open Register > Personnel > Employee

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

Family Relation

File > Open Register > Personnel > Employee

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

Institute

File > Open Register > Personnel > Employee

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

Marital Status

File > Open Register > Personnel > Employee

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

Sailing Period

File > Open Register > Personnel > Employee

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

To define days on and days off:

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

Sickness

File > Open Register > Personnel > Employee

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

Sickness Nature

File > Open Register > Personnel > Employee

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

Sickness Type

File > Open Register > Personnel > Employee

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

Standard Document

File > Open Register > Personnel > Employee

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

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

The register is divided into three categories:

- ID Books
- Licenses
- Qualifications

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

Standard Document Type

File > Open Register > Personnel > Employee

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

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

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

Termination Reason

File > Open Register > Personnel > Employee

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

Trade Union

File > Open Register > Personnel > Employee

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

General

Airport

File > Open Register > Personnel > General

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

On Board Administration

Crew Effect Type

File > Open Register > Personnel > On Board Administration

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

Ship Store Type

File > Open Register > Personnel > On Board Administration

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

Slopchest

Slopchest Departments and Locations

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

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

Slopchest Stock Class

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

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

System

Employee Details

File > Open Register > Personnel > System

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

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

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

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

Adding a Button

1. First, define the new category in the Standard Document Type register.
2. Click on the appropriate sub-register - Family, License, Medical, Passport/Visa - in the **Personnel Registers > System > Employee Details** folder. Existing buttons on the corresponding tab will be listed.
3. Click the **New** button in the toolbar.
4. Click in the **Code** field to open a drop-down list of the registered codes, and select the required code from the list.
5. Enter the required information into the **Title** and **Description** fields.The number you type into the **Sequence** field defines where in the list of buttons on the tab this one will be displayed. For example, if you type 1 into this field, this button will be displayed at the top of the list of buttons. You may need to re-number existing buttons.

6. **Mandatory** - If this check box is ticked, then this is a standard button and it must not be deleted or changed.
7. Click in the **Standard Doc. Type** field to open a list of the standard document types, and select an item from the drop-down list.
8. **Save** the changes.

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

Payroll Registers

Registers containing information specific to AMOS Business Suite Maintenance Payroll module are grouped here.

Accumulators

File > Open Register > Payroll > Accumulators

Define the codes and descriptions for the various accumulators that wage types can be linked to in order to be accumulated.

Banks

File > Open Register > Payroll > Bank

Define the information for the different banks that employees belong to.

Bargain Agreement

File > Open Register > Payroll > Bargain Agreement

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

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

Edit Wage Scale

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

Future Wage Scale

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

Currency Rounding

File > Open Register > Payroll > Currency Rounding

Select specific currencies for rounding. These currencies will then be rounded in the payroll functions.

Period

File > Open Register > Payroll > Period

Define the month and year of the first financial period when you start using the payroll.

- Select the next sequential number for the upcoming new period. It should correspond with the number of the period month, i.e. the number for February is 2.
- Enter the correct year in the **Period Year** field.
- Enter the month and year for the financial period in the **Description** field, i.e the period for February 2006 is called 02/06.

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

Wage Type

File > Open Register > Payroll > Wage Type

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

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

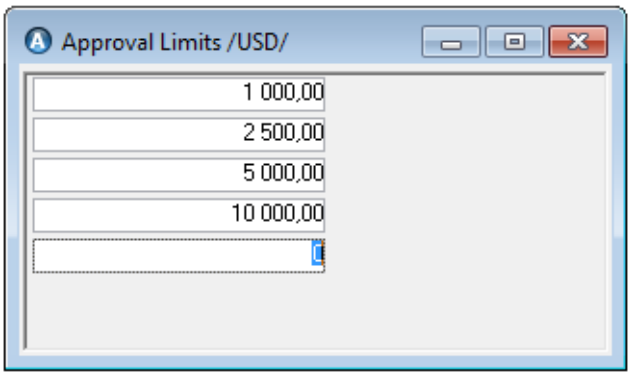
Tools Menu Registers

Certain registers are accessed via the Tools menu. These registers are grouped here.

Approval Limits

Tools > Configuration > Access Control > Approval Limits

Create a set of Approval Limits to define the maximum amount a given group is allowed to approve. The limits are expressed in your base currency code by default.



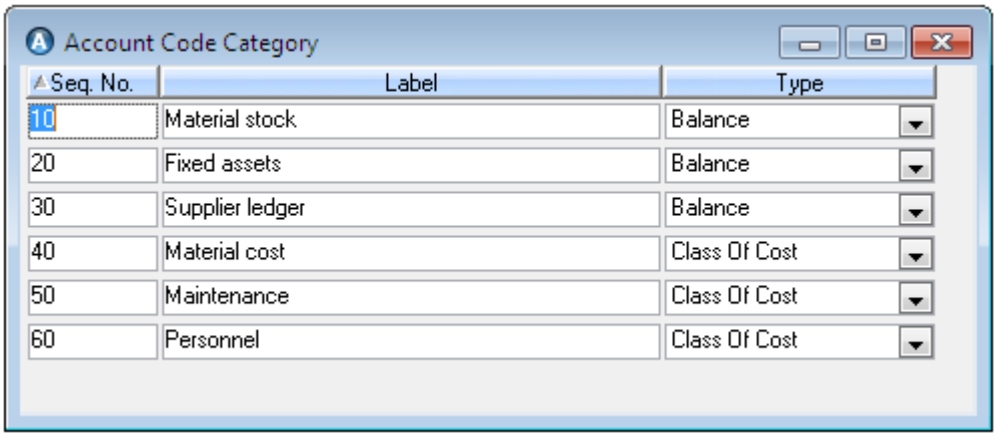
Since approval limits apply to groups and not users, any user who is a member of a particular group can approve purchases at a level less than or equal to their approval limit. If the user is a member of more than one group, then the highest approval limit of all the groups the user is a member of applies.

Account Code Categories

Tools > Configuration > Accounting > Account Code Categories

Account Code Categories are for grouping similar codes in the Account Codes register together. To add a category to the register:

1. Go to **Tools > Configuration > Accounting > Account Code Categories**.
2. Click **New**.
3. Enter a numerical value in the **Sequence** field and a name for the category in the **Label** field.
4. There are three account **Types** to choose from:
   - **Balance**. Accounts which accumulate value: stock accounts, capital value accounts, fixed asset accounts, and so on.
   - **Class of Cost**. Accounts for recording expenses.
   - **Generic**. Accounts with no restrictions on how they can be used. Mainly for backwards compatibility with earlier versions of AMOS which did not have account code categories; however since they do not have any restrictions, they can be used broadly.



5. **Save** the register.

Cost Centres

Tools > Configuration > Accounting > Cost Centres

Define a list of Cost Centres. Each cost centre is a separate financial area for registering expenses against and recording where resources are used. A cost centre can be a department; a collection of departments; a machine or collection of machines or any other unit you want to record transactions and costs against.

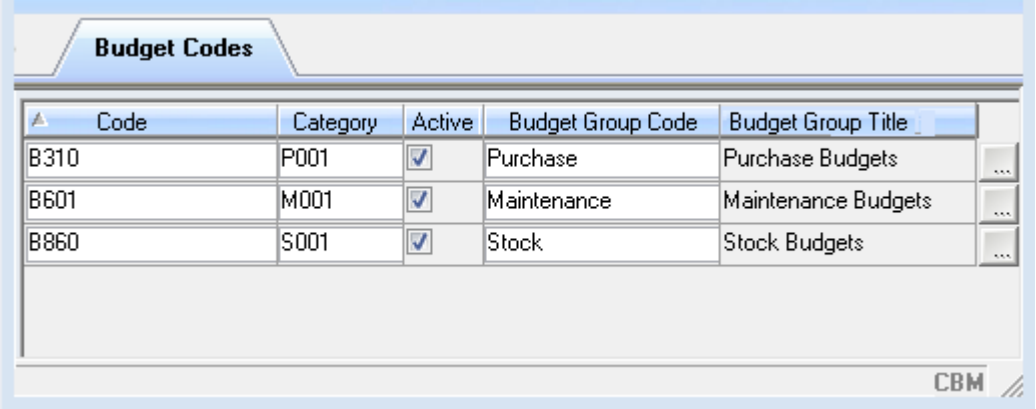
See "Account Transactions" on page 176 about cost centres and their use in accounting.

Budget Codes

Your budget is set up using Budget Codes which may correspond to various account numbers from the accounting system. Once budget codes have been established and actual amounts have been entered for each one, AMOS can automatically compare the amounts actually spent to the budgeted amounts.

To add a new budget code:

1. Go to **Tools > Configuration > Budget > Budget Codes**.



2. Click **New** in the toolbar.
3. Enter a **Code** and **Category** and make sure that the **Active** checkbox is flagged.
4. Lookup a **Budget Group Title** to create a budget hierarchy.

Transaction Codes

Tools > Configuration > Stock > Transaction Codes

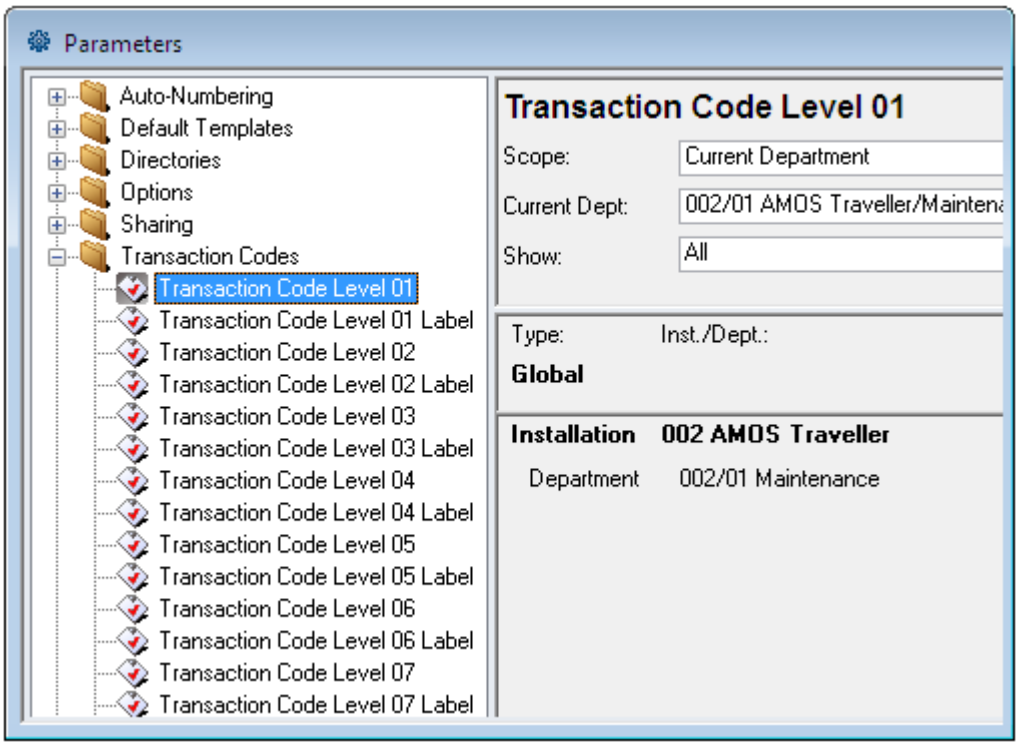
Transaction Codes can connect expenses to a specific budget dimension, like 'Responsible' or 'Project'. The codes themselves are not directly connected to the budget.

To activate and use transaction codes first set the relevant parameters. Then enter values for each code in the Transaction Codes register.

Setting the Transaction Code Parameters

Set the transaction code parameters; this activates them for application in the system. There are ten Transaction Code Levels, for each of which you can define a status and a label:

1. Go to **Tools > Configuration > Parameters**. Click on the Transaction Codes folder to expand it.
2. The list of ten Transaction Code Levels and Labels appear.

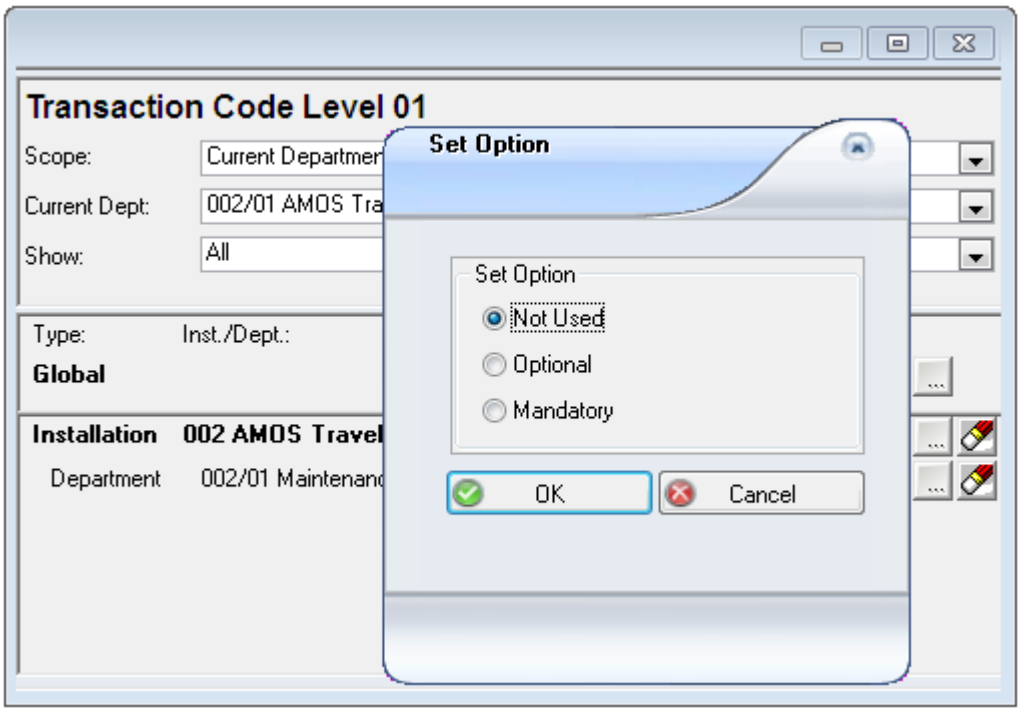


3. Select a **Level** and use the lookups to assign a status, either globally or by installation/department. There are three possibilities:

   Mandatory. Every transaction must have a value for this code.

   Optional. Up to the user.

   Not Used. This code is not in use.

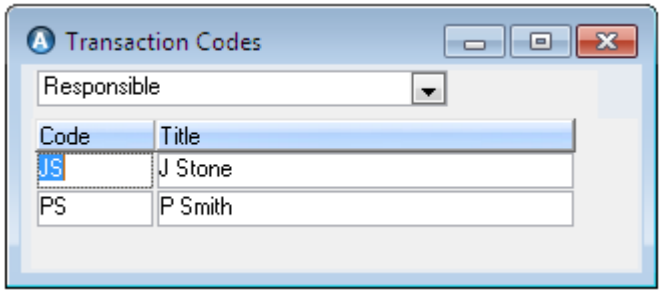


4. Next, select the **Label** parameter for the same Level. Enter a name to identify the transaction code level by. Codes belonging to this level will be identified with the label you provide. For example, Responsible or Project.
5. **Save** your work before exiting the window.

Enter Values for the Transaction Codes

Create a list of transaction codes grouped for each label:

1. Go to **Tools > Configuration > Stock > Transaction Codes**.
2. Select a transaction code from the drop-down list.
3. Click **New** and then enter a **Code** and **Title** for the transaction code. For example, select the label 'Responsible', and enter the initials and names of the people assigned as responsible for various projects:



   Create as many transaction codes for the selected label as required. These codes will have the status defined for the label in the parameters window.

4. **Save** and close the window.

Applying Transaction Codes

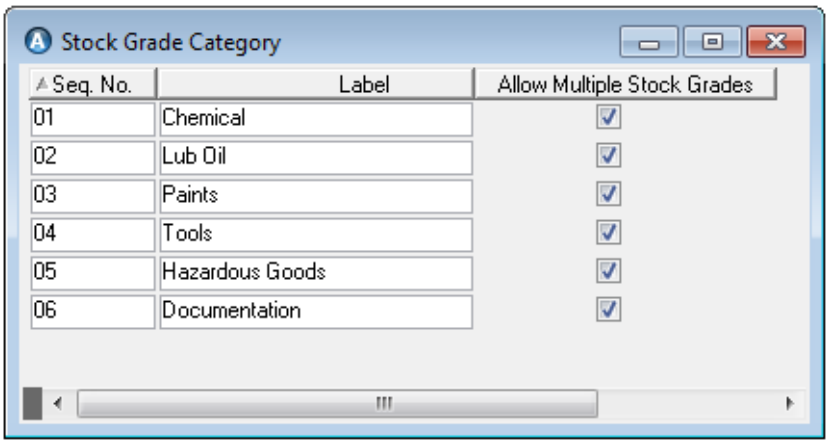
Once parameters are set and the code values defined, the transaction codes become available for use throughout the system.

> **EXAMPLE**
>
> Open the Components window and select a component in the list. Go to **Options > Transaction Codes**. You'll see the transaction code labels you defined in the Parameters window and the values you defined for each label. When you select a code it will apply by default to subsequent transactions involving this component and any related expenses will be linked to the appropriate budget dimension. So, when a user opens the In/Out of Stock window and takes a part in or out against this component which has default transaction codes applied, those codes will appear in the In/Out of Stock window.

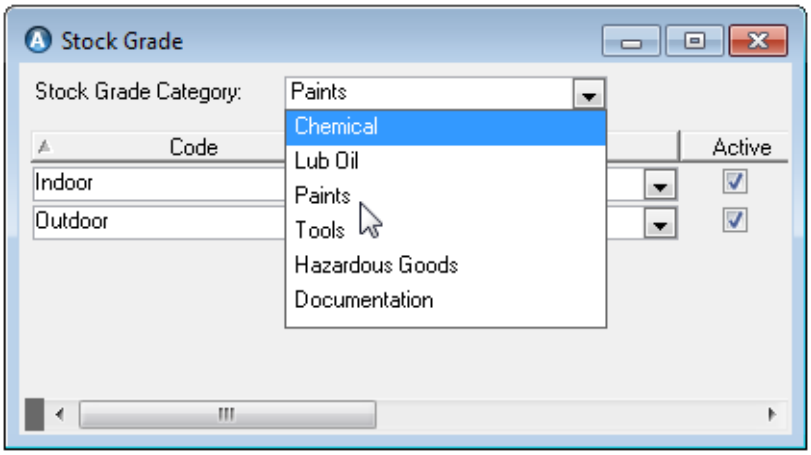
Stock Grade Categories

Tools > Configuration > Stock > Stock Grade Categories

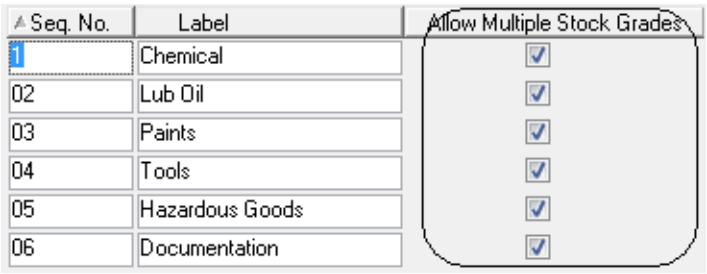
Create categories for use in the Stock Grades register, like Paints, Tools, Chemicals, Hazardous Goods, Documentation:



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



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

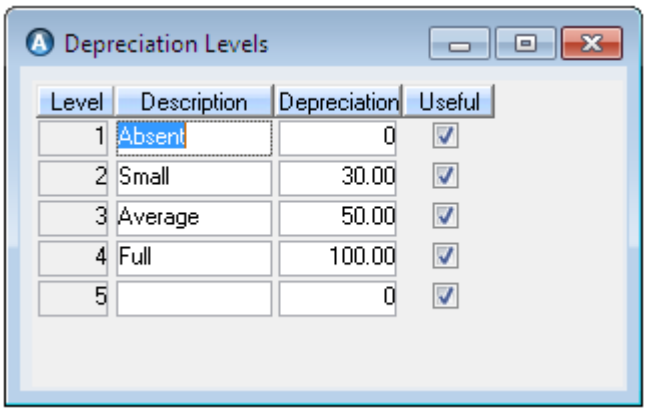


If you uncheck the box on any category, only one stock grade from that category can be applied to the same stock type/item.

Depreciation Levels

Tools > Configuration > Stock > Depreciation Levels

Define rates of depreciation independently of depreciation time periods. This is particularly useful where regional accounting methods demand such flexibility.


Depreciation Levels
Level
Description
Depreciation
Useful
1
Absent
0
2
Small
30.00
3
Average
50.00
4
Full
100.00
5
0

CHAPTER 3

Installations and Departments

Your organisation is probably made up of many installations like offices and vessels, and every installation probably contains multiple departments such as maintenance, personnel and so on.

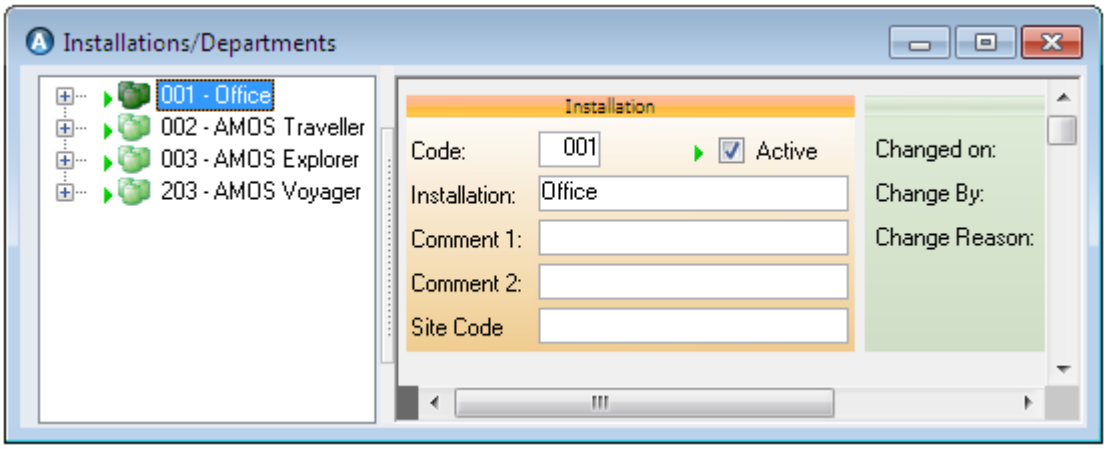
This chapter includes the following topics:

Managing Installations and Departments 74
Installation Groups 75
Switching Departments 75
Multi Company Management 76

SpecTec

Managing Installations and Departments

Go to **Tools > Configuration > Installations > Installations/Departments** to open the Installations/Departments window:



The left side of the window displays a hierarchy, containing the Installations and Departments already registered.

Creating a New Installation

1. Click the **New** button. In the New dialog, select Installation. Click **OK**.
2. A new Installation icon is added to the hierarchy. Give it a **Code** and a **Name**.
   - There are two separate **Comments** fields available for any extra information you want to add.
   - **Site Code**. A shortform code like AVO for AMOS Voyager.
3. **Save** the installation.

Adding a Department to an Installation

1. Select an Installation in the hierarchy and click **New**.
2. Select **Department** in the dialog and click **OK**.
3. A new Department icon is added beneath your new Installation. Give it a **Code** and a **Name**.
   - There are two separate **Comments** fields for any extra information you want to add.
   - **Cost Centre**. Select the default cost centre for this department.

   You can move a department easily by dragging it from one installation and dropping it into another installation. Departments cannot contain any sub-levels.
4. **Save** the Department.

Activating/Deactivating Installations/Departments

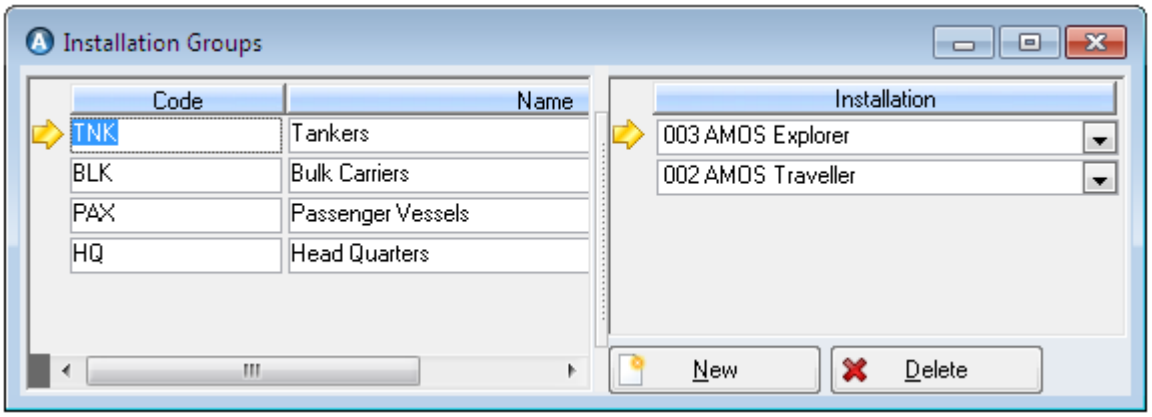
To make an installation or department active and available, flag the **Active** checkbox at both levels. Unflag it to deactivate the selected installation or department. Deactivated installations/departments will not be a part of **Global Search** operations, and users will be prevented from switching to these areas.

Installation Groups

Group installations together to make distribution to multiple sites easier.

EXAMPLE

With AMOS Quality and Safety you can distribute procedure documents to installations and/or installation groups. If you've grouped standard procedures together according to class type, you can distribute by installation group rather than one-by-one to each installation.



Creating a New Group

1. Go to **Tools > Configuration > Installations > Installation Groups**.
2. Click the **New** button on the toolbar.
3. Enter a **Code** and **Name** to the blank line on the left, like HQ and Headquarters.
4. **Save** the group.

Assigning an Installation to a Group

1. Go to **Tools > Configuration > Installations > Installation Groups**.
2. Select a group on the left.
3. Click the **New** button in the bottom of the right side.
4. Select an **Installation** from the new drop-down at the top of the right side. Add as many installations to the group as needed.
5. **Save** the group.

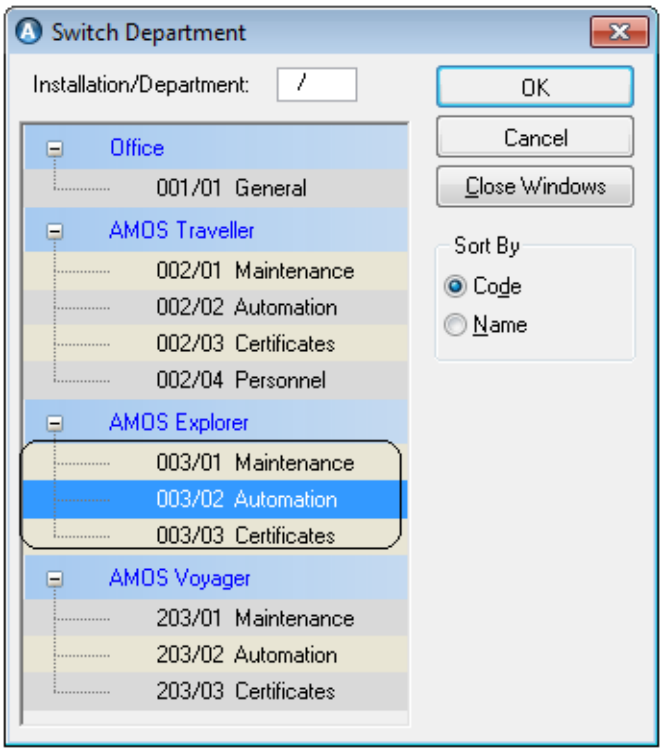
Switching Departments

As you work in AMOS you can move from one department to another.

To switch departments:

1. Go to **File > Switch Department**. You get a list of installations and departments.

   The Switch Department dialog only shows the actively available departments that you (the logged in user) have access to. Select a department in the list:



2. Click **OK**.

Note: Close any open windows prior to switching departments. It is not possible to switch from one department to another while windows are open.

The default sort order for installations and departments is by **Code**. If you change the **Sort By** setting to **Name**, the installations are automatically ordered alphabetically. The departments within each installation will be ordered alphabetically also.

Multi Company Management

AMOS helps you to handle more than one company within the same system; each one as a separate financial entity with its own base currency and one or more of its own installations. All financial information is kept strictly separated.

Each company requires:

- individual registration in the Company window;
- installations and departments created in the Installations/Departments window, and linked to the company registration.

To register a new company and link installations:

1. Go to **Tools > Configuration > Installations > Company**.
2. Click inside the hierarchy panel on the left. Click **the New** button on the toolbar to add a new icon.
3. Select the new icon and enter a **Code** and **Name** on the General tab.
4. Fill in the other details.
5. If you have **a Logo** to use on reports, lookup its location.
6. Open the Currency Access tab and flag the currencies you want this company to use.
7. Open the Installations tab. Click **New** at the bottom of the tab.
8. Lookup an **Installation**. An installation cannot be linked to more than one company at a time so only available ones will appear for selection.
9. **Save** the window.

CHAPTER 4

Users, Groups & Access Control

Every AMOS user receives a User ID and a password. Users are then assigned to Groups, whose access rights determine which modules the users in the group can see and use.

This chapter includes the following topics:

Setting Up Users, Groups and Access 78
Users 78
User Groups 88
Setting Group Access Rights 91
Access Control 94
Tab and Field-Level Access 101

SpecTec

Setting Up Users, Groups and Access

To set up and manage users, groups and access rights:

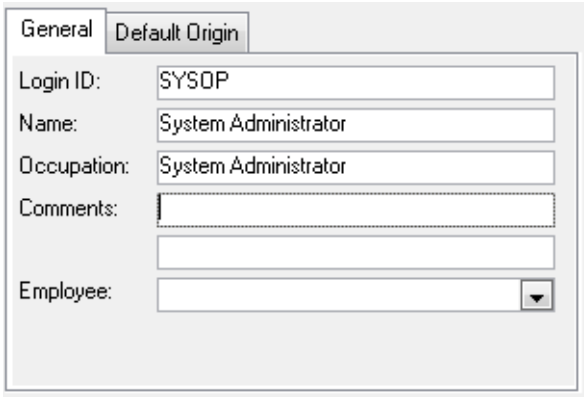
1. Create User IDs in the Users window. See "Users" below.
2. Create Groups and assign every user to one or more. See "User Groups" on page 88.
3. Assign access rights to the user groups. See "Setting Group Access Rights" on page 91.
4. Fine tune access control levels throughout the system for each user group. See "Access Control" on page 94.
5. (Optional) To further restrict both the visibility and editing of fields, set access on selected fields and tabs. See "Tab and Field-Level Access" on page 101.

Users

Every user requires a unique login ID to access the system.

Creating a New User

1. Go to **Tools > Configuration > Access Control > Users**.
2. Click **New**.
3. Enter a **Login ID** and the user's **Name**.



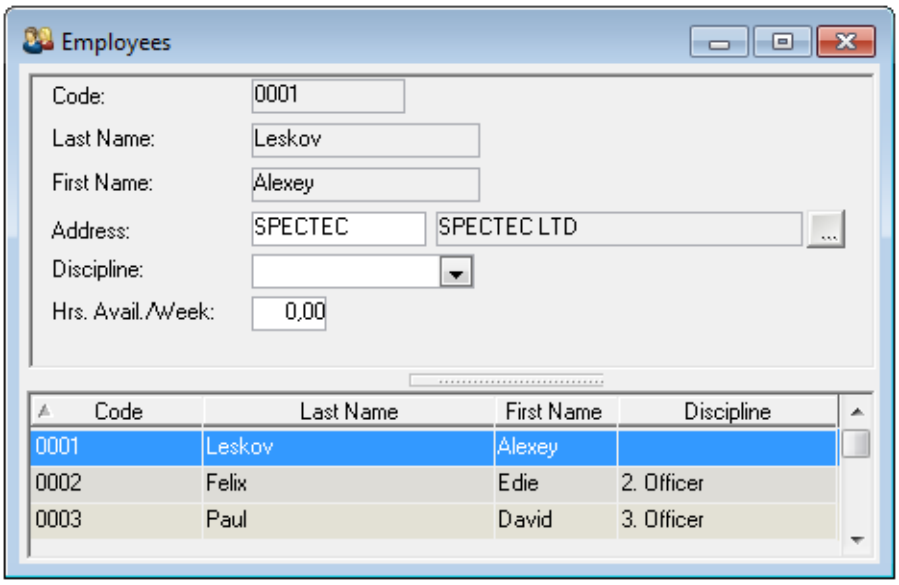
   Login IDs can represent a position like Chief Engineer or Captain etc., or an individual user.
4. Enter the user's **Occupation** and any **Comments**.
5. **Save** the record.

Linking Employees and Users Together

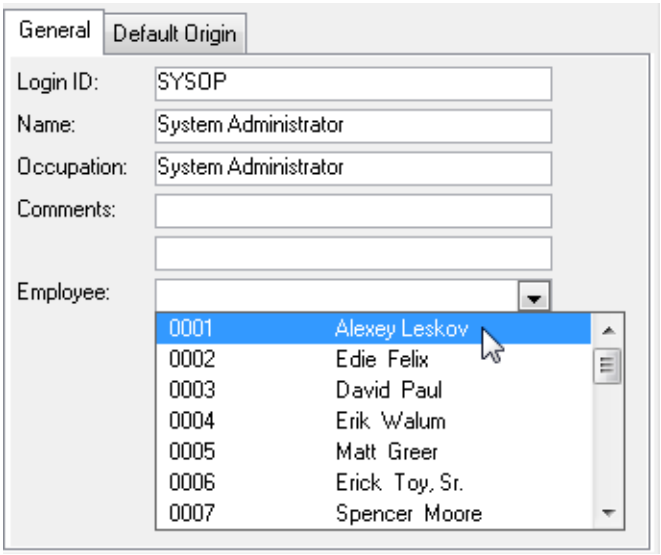
You can link an AMOS *user* record and an *employee* record together so that the system will recognise the user and the employee as the same person. To do so:

1. Open the Employees register or the **Crewing > Employee** window[1].
2. Create and **Save** an employee registration:

[1] The Employee window is available to users whose system license includes Crewing.



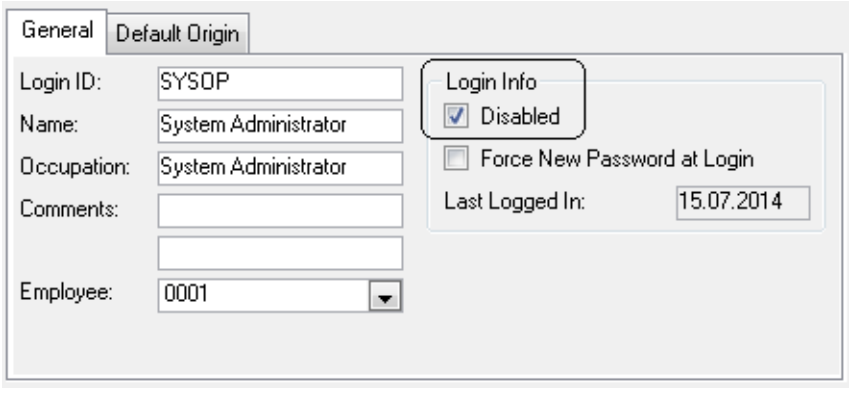
3. Open the Users window. Create a new or select an existing user ID.
4. Select the employee record in the **Employee** drop-down:



5. **Save** the window. The AMOS user details and employee details are now linked together.

Enabling/Disabling Users

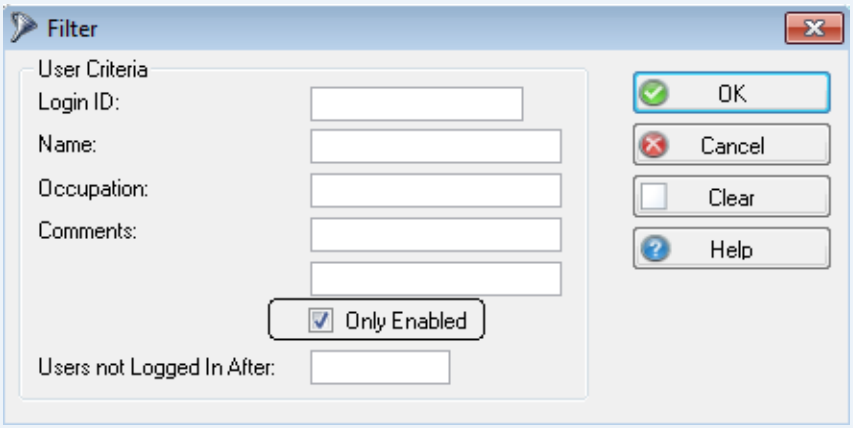
Deactivate a user and prevent him/her from accessing the system by selecting his/her user ID and flagging the **Disabled** checkbox:



This locks the user out of his/her account.

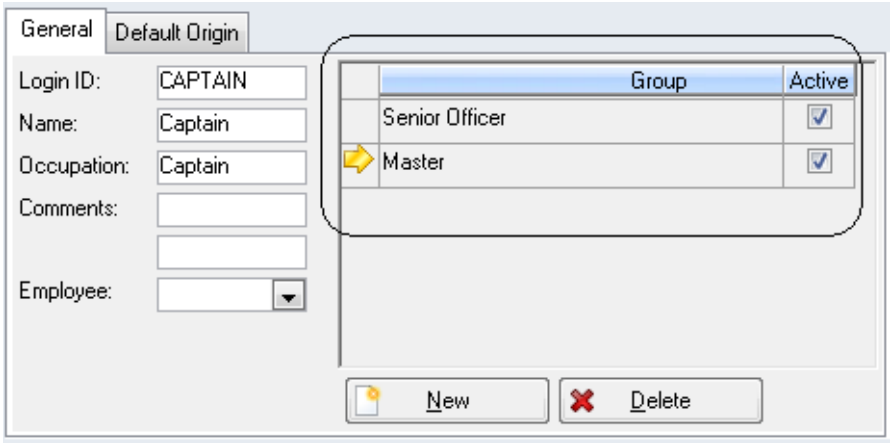
T i p

Filter the Users window by flagging the **Only Enabled** checkbox to return only those users who are currently active in the system:



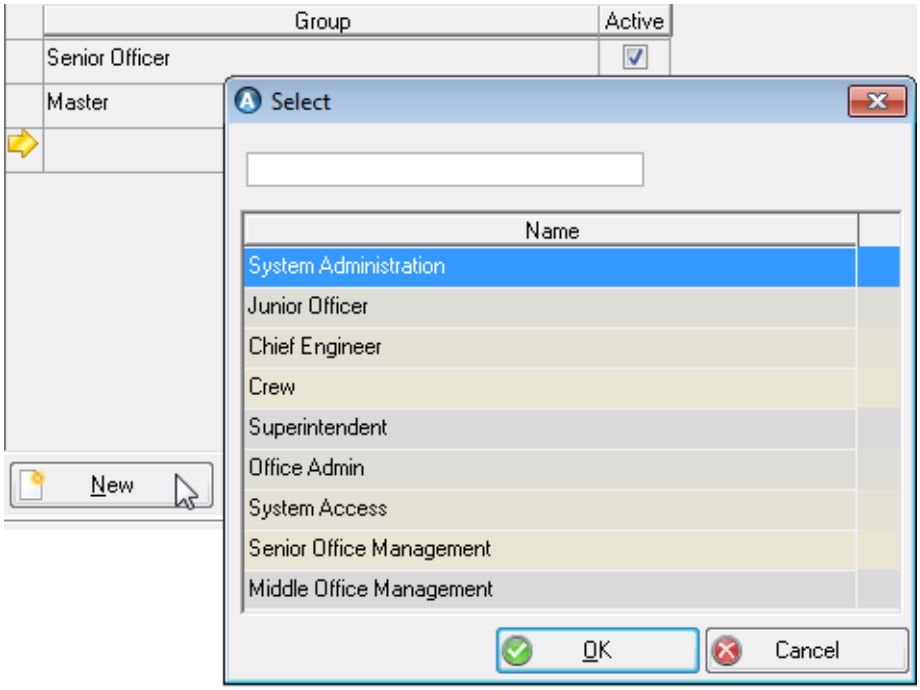
Adding Users to Groups

Once user groups are defined, it's possible to manage the group(s) a user belongs to on the Users window. Any groups a user already belongs to are listed on the right side of the Users window:



Unflagging the **Active** checkbox will leave the group in the list but deactivate the current user in it. Changing the checkbox setting in the Users window will update the Groups > Members window and vice versa.

Click **New** to add a group to the list. The user will automatically be a member of the new group:



Click **Delete** to remove a group entire, thereby removing the user's rights to that group's access.

You can also manage a user's groups in the Groups > Members window. See "Assigning Users to Groups" on page 90 about the Group > Members window.

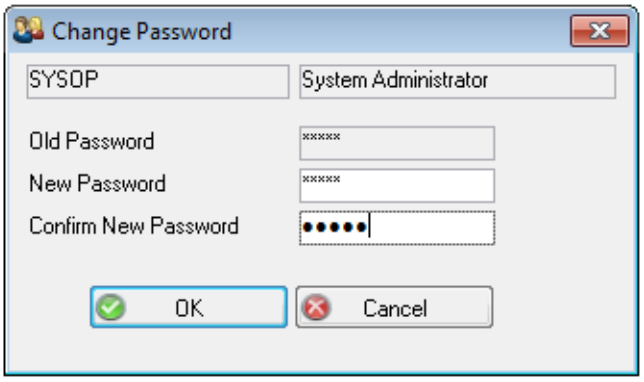
Passwords

Whenever someone logs into AMOS Business Suite, a database user called AMOS is automatically used behind the scenes. This accesses the table of application users to check that the person logging in has a valid password.

Assigning/Changing a User Password

A newly created user needs a password. To assign/change a password:

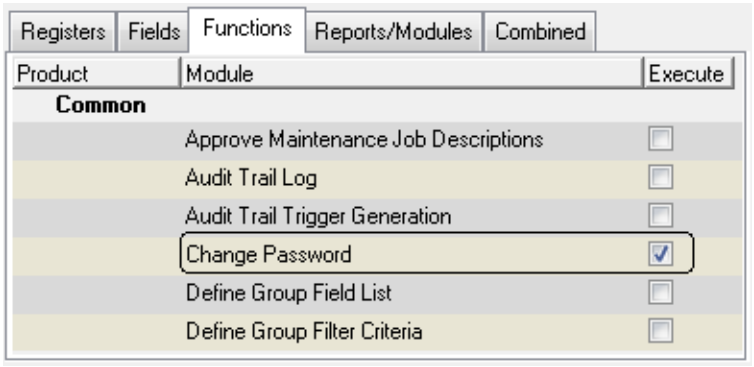
1. Open the Users window and select a user.
2. Go to **Options > Change Password**:



3. Type a password in the **New Password** field, and then **Confirm** it in the field below.
4. Click **OK** to return to the main window.
5. **Save** the user.

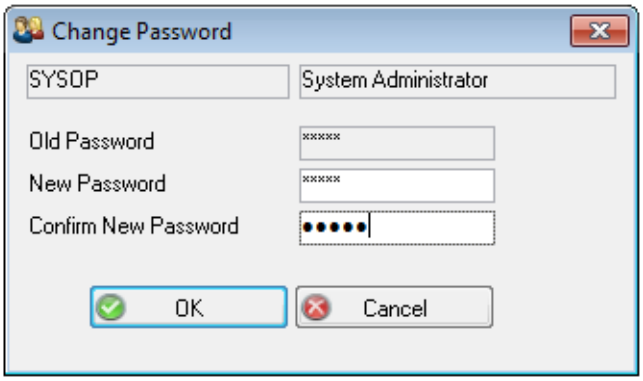
Allowing Users to Change Their Own Password

For any user to be able to change his/her own password at any time, he/she must belong to a user group which has the correct access in the Access Control window, Functions tab:



A user in a group with this access right can then change his/her own password:

1. Go to **Tools > Change Password**:

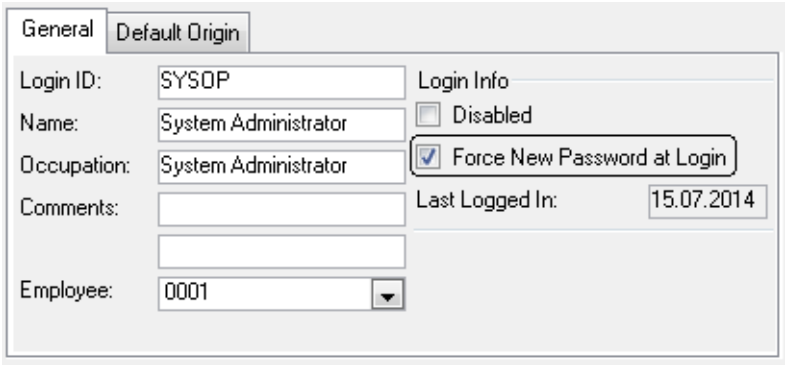


2. Type a **New Password** and **Confirm** it by entering it a second time.
3. Click **OK**. The password is now changed.

Forcing a Password Change

To require a user to change his/her password:

1. Open the Users window and select a user in the list.
2. Check the **Force New Password at Login** checkbox:



The next time this user logs in the Change Password dialog will appear, requiring him/her to change their password before they can proceed. The flag on the **Force New Password** checkbox will automatically be removed once the user has changed his/her password.

Password Parameters

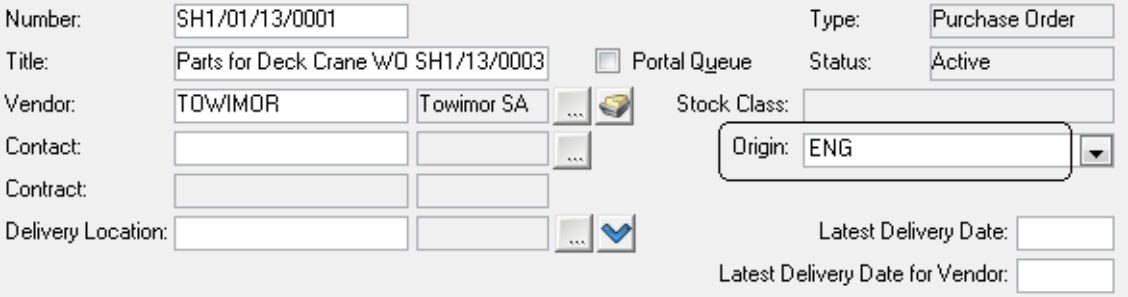
Passwords have to meet certain criteria, depending on some parameter settings. The parameters controlling passwords and system access are found at **Tools > Configuration > Parameters > Options > General > System Access >** .

- **Enforce Complex Password**. Determines whether complex passwords must be used or not. If this parameter is set to TRUE, all passwords must contain certain elements like upper/lower case characters and non-/alphabetic characters.
- **Enforce Password History**. Controls how many previously used passwords for each user are retained in the system. For example if the parameter is set to 2, then a user's 2 most recent passwords will not be accepted during a password change.
- **Maximum Password Age**. Determines the maximum allowed age in days of all passwords.
- **Minimum Password Length**. Determines the minimum number of characters acceptable in a password.

See "System Access Parameters" on page 125 for more details, and a complete list of all the system access parameters.

Default Origin on Purchase Forms

A purchase form in AMOS can be created for any department in the system - like 'Deck' or 'Engine'. The **Origin** field on the Forms window indicates the departmental division the selected form belongs to:



Read about setting up and applying order form origins in the *AMOS M&P User Guide*.

Note: You can define access to order form origins and default origins at group level or at user level. It is not necessary to define settings in both areas; if you do, AMOS considers the logged in user's settings at user level first and then at group level second.

How Does it Work?

If you do not set any default origins at user level, AMOS will look for a definition at group level. If no origin is set on the group either, or the user belongs to more than one group and has no user-level default, the origin on newly created order forms will be left blank.

As soon as you have assigned one or more origins to a user or his/her group, he/she can only edit forms coming from those origins, as well any forms without an origin assigned. To edit any purchase form regardless of origin, users must belong to a group with access to 'Allow editing forms of all origin' on the Access Control window Functions tab. Users can change the origin on a form to another origin they have access to.

Setting Default Form Origins

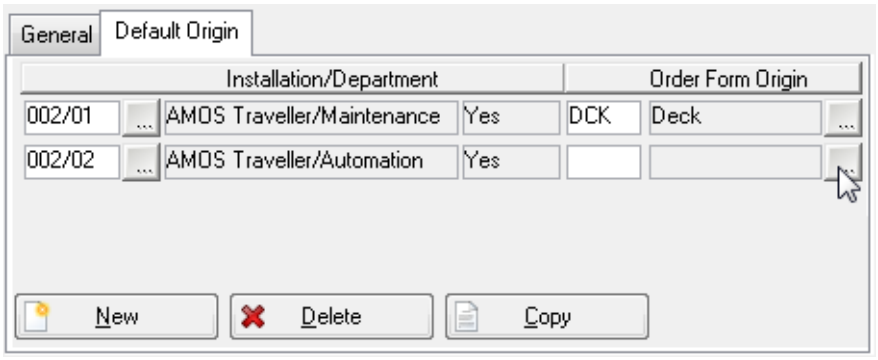
You can link order form origin values to a user ID by installation/department. Whenever that user creates a purchase form his/her 'default' origin value for the department he/she is logged into will appear on the form automatically.

EXAMPLE

The default origin at AMOS Traveller/Maintenance is set to 'Deck' for a user. The same user's default origin at AMOS Traveller/Automation is set to 'Engine'. The user logs onto AMOS Traveller/Maintenance and creates a purchase order, and the **Origin** field on the form is automatically set to 'Deck'.

To set default form origins[1]:

1. Open the Users window and select a user. Open the Default Origin tab.
2. Click the **New** button inside the tab.
3. Select an **Installation/Department**. User access to that installation/department is indicated by a 'Yes' or 'No':



4. Choose a departmental division at each Installation/Department, with the **Order Form Origin** lookup.

   Tip

   Use the **Copy** button and then **Options > Paste Origin** to apply a list of origins to another user.

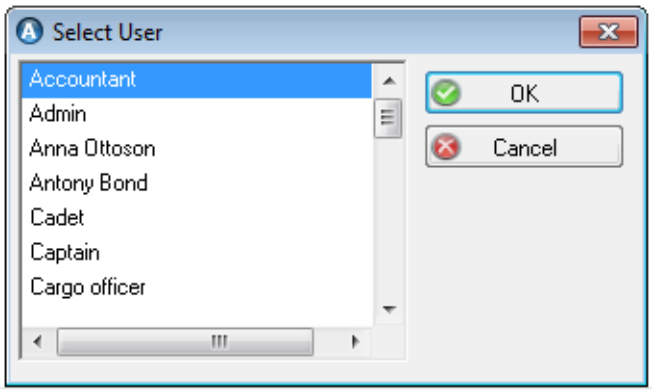
5. **Save** the window.

Moving User References

To clean up the list of users in a database:

1. Open the Users window and select a user to remove.
2. Go to **Options > Move User References**. Select another user to move the first user's references to:

[1] Setting default origins requires that a list of available origins has been defined in the register at File > Open Register > Purchase > Order Form Origin. See the *AMOS M&P User Guide*.

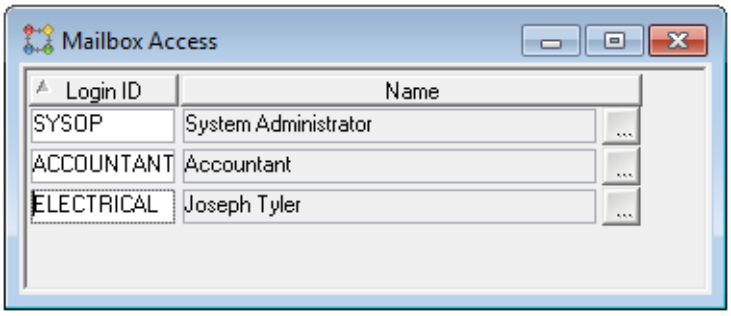


3. Click **OK** to return to the main window. Delete or disable the first-selected user.
4. **Save** the changes.

Mailbox Access

To add users to group or departmental mailboxes:

1. Open the Users window and select a user.
2. Go to **Options > Mailbox Access**. Any mailboxes already assigned to the selected user will appear in a list.
3. Click **New** on the toolbar and lookup a **Login ID** and **Name**.



This gives the first-selected user access to that user's mailbox. To remove any mailbox from the list, select it and click **Delete**.

4. **Save** and close the window.

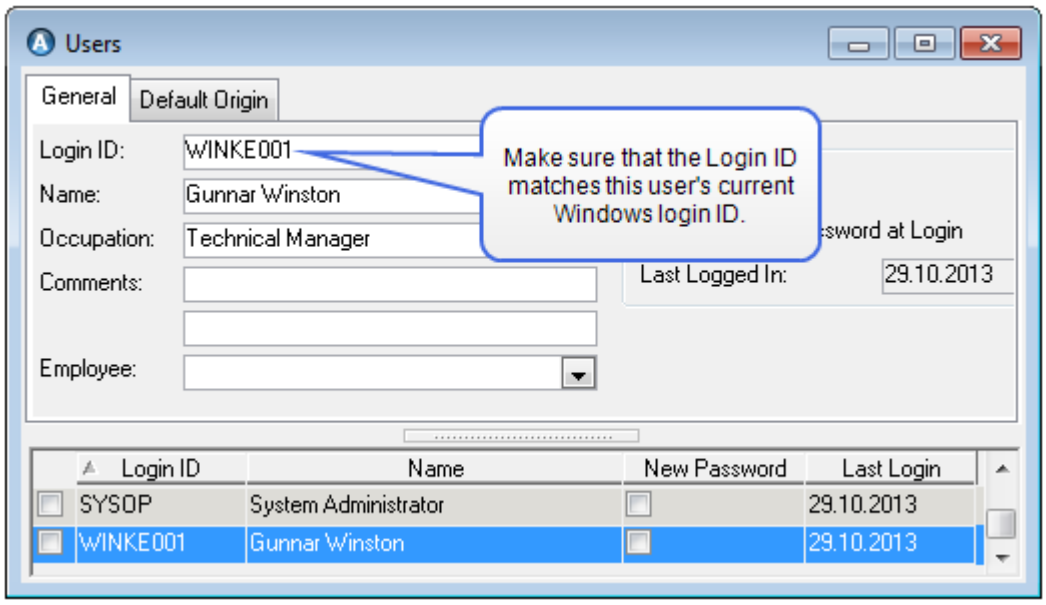
When the parameter 'Use Work Flow' is set to TRUE, filters in windows using work flow will contain the selection 'All Accessible'. Selecting it allows users to see the work flow objects that have been assigned to them as well as any work flow objects assigned to any users they are allowed mailbox access to.

Logging On With Windows Credentials

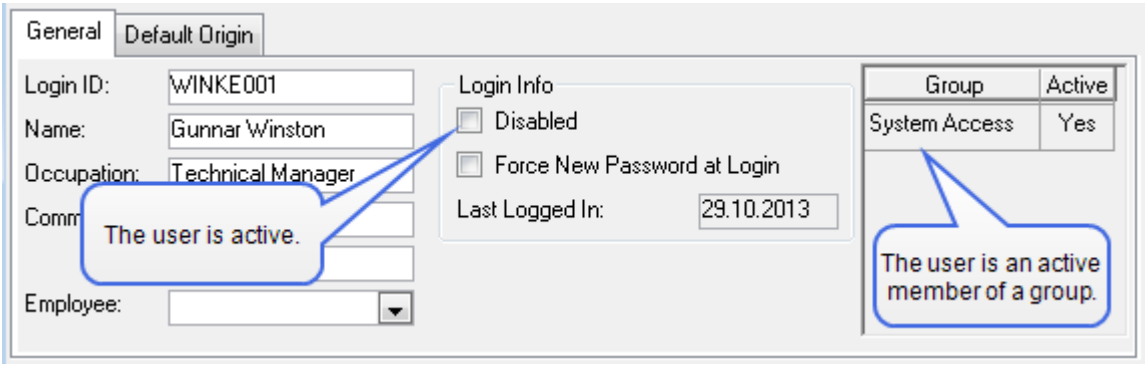
There is a system parameter setting in AMOS which will let users log in to AMOS Business Suite using their Windows login credentials instead of separate, dedicated AMOS credentials. This limits the number of passwords users need to remember and also lets the system administrator centrally define which users can take advantage of this functionality.

There are just a few steps:

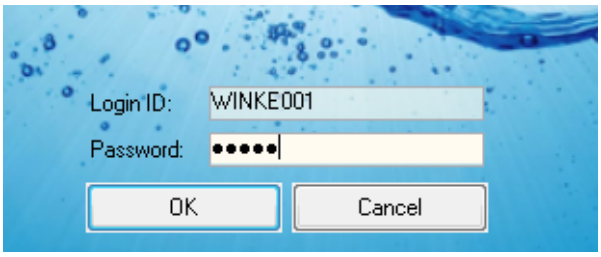
1. Create one or more AMOS users whose AMOS **Login ID** matches their current Windows ID. Or, change an existing user's Login ID to match their Windows name:



Make sure each user is active, has a password[1] and is a member of a group:



This user can now login to AMOS using his Windows name and his current AMOS password:



2. Go to **Tools > Configuration > Parameters > Options > General > System Access >** 'Allow Windows Login Verification'. This parameter is set by default to AMOS ONLY, meaning only the user name and password defined in AMOS will be accepted at login.

[1] If you created a new user, specify a password at Options > Change Password. Manually changing an existing password to the user's Windows password is not necessary.



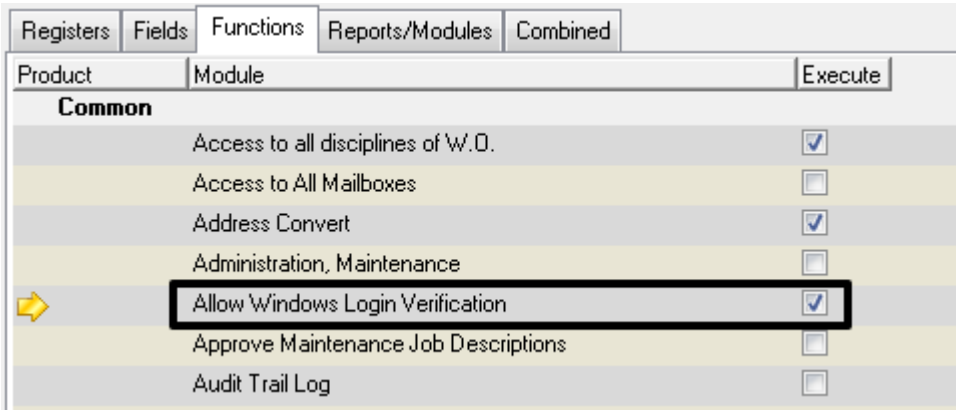
Set the parameter to allow Windows Login credentials. Change the setting[1] :

- WINDOWS ONLY. Only Windows credentials will be accepted at login. This means that all users will need to have an AMOS Login ID that matches their Windows ID. Access to 'Allow Windows Login Verification' is not required. With or without that access setting, AMOS will allow the user to login with his Windows ID and password. Only correct Windows credentials will be accepted and the system will not update the user's password in AMOS.

  or

- WINDOWS OR AMOS. Allows a user whose AMOS Login ID and Windows ID match *and* who also belongs to a group with access to 'Allow Windows Login Verification', to login with Windows credentials.

  After you set and save the parameter, go to **Tools > Configuration > Access Control > Groups** and select the user group(s) you want the parameter to apply to. Go to **Options > Access Control**, open the Functions tab and flag **Execute** access to 'Allow Windows Login Verification' under the Common grouping.



  The first time a user in a group with correct access logs in with their Windows password, AMOS will verify that the Windows credentials are allowed and correct, and let the user in. Then, AMOS will automatically update the user's AMOS password to the Windows one he just provided.

  Users in a group without the access setting will continue to use their AMOS credentials.

[1] Note that this parameter setting is valid only at Global level.

or

» WINDOWS AND AMOS. Allows users to login with both Windows and AMOS credentials, respecting group access to 'Allow Windows Login Verification'. In this case the system will not set users' AMOS passwords to match their Windows passwords. Then, if a user is moved to another group without access to Windows login, his AMOS password will still be valid.

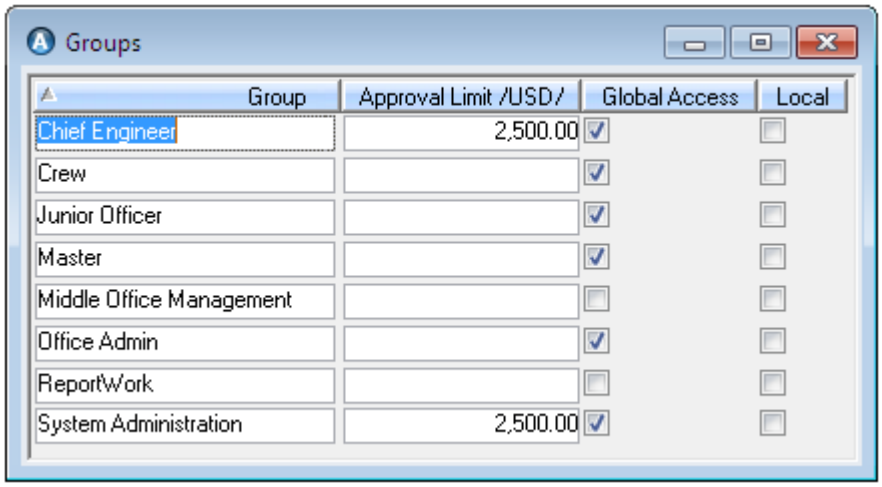
3. **Save** your changes.

User Groups

Every AMOS user must belong to one or more user groups. Access rights are assigned to these groups and so, a user's access to the system is determined by the group(s) he/she belongs to. This means that a user not assigned to any group will not be able to use the system.

Creating a New Group

1. Go to **Tools > Configuration > Access Control > Groups**:



2. Click the **New** button and enter a name for the group.
3. Click in the **Approval Limit** field to get a drop-down and select a limit. See "Groups and Approval Limits" on the facing page for more information.
4. **Save** the new group.

Global Access versus Department Access

Flag the **Global Access** checkbox next to a group to give that group access to all defined installations and departments in the system. Once flagged, you cannot assign or remove access to selected departments: **Options > Department Access** is not available.

Otherwise, to limit a group's access to selected departments:

1. Select the group. Do not flag **Global Access**.
2. Go to **Options > Department Access**.
3. Flag the departments the group can access.
4. **Save** and close the window to return to the main Groups window.

Note: Another way to limit department access for users in any group is to take away their ability to switch departments (unflag the 'Switch Department' setting in the Access Control window > Functions tab). This limits them either to the 'Start In Department' or the department(s) they have access to via the command line parameters.

Local Access

The **Local** checkbox determines whether the access rights set for a group are local to the installation you are at, or not.

> **EXAMPLE**
>
> Using this setting lets you assign access rights at the office site that are different from the rights at the remote sites: a user group might have the ability to create requisitions while working at a remote site, but not at the office.

Your Export Selection Scripts must be modified to accommodate the changes if you want to use this setting:

1. Start by modifying the Office Export Selection Script for the table sys_access.
2. The replication rule for the sys_access table states:

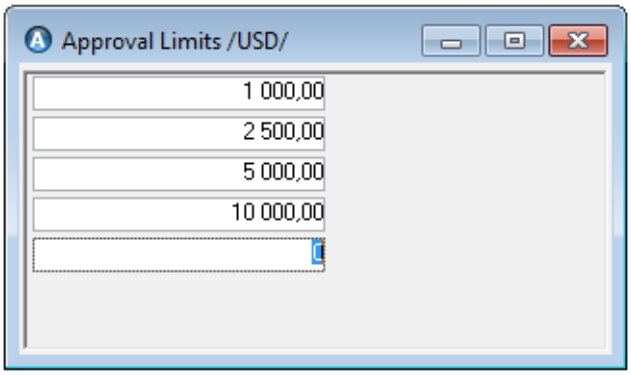
```
Register sys_access If
(Sys_Group_ID In
(Select Sys_Group_ID From Amos.Sys_Groups Where LocalGroup = 0))
```

3. This tells AMOS to export access rights only for groups which are not 'Local' - that is, where the sys_groups.LocalGroup field is 0. AMOS will not export access rights for any group where the **Local** column IS flagged.
4. To apply a set of access rights at a remote site, set the rights for a group but leave the **Local** checkbox *unflagged*. Then, adjust the access rights for this group to the rights you want the group members to have at the remote site.
5. Export the information as per standard export procedures.
6. Once the export is complete, adjust the access rights to what they should be at the office site. This time, flag the **Local** checkbox. This sets the field sys_groups.LocalGroup to 1.
7. As per the Export Selection Script, the access rights will not export.

Groups and Approval Limits

With approval limits you can define the maximum amount any group member is allowed to approve. First, define the limits in the Approval Limits register:

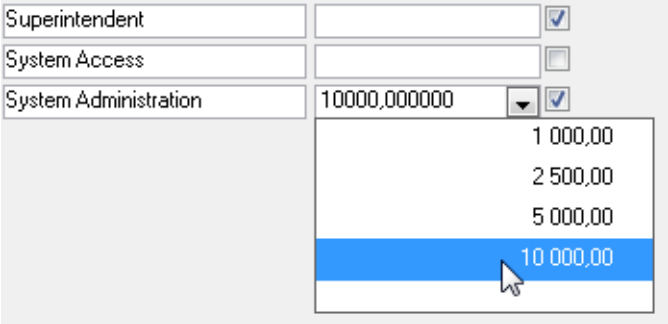
1. Go to **Tools > Configuration > Access Control > Approval Limits**.
2. Click **New** on the toolbar and enter a value. Approval limits are expressed in your base currency by default.



3. **Save and** close the window.

Then, assign a limit to each group in the list:

1. Open the Groups window.
2. Click in the **Approval Limit** field next to a group and select a limit:



3. **Save** the group.

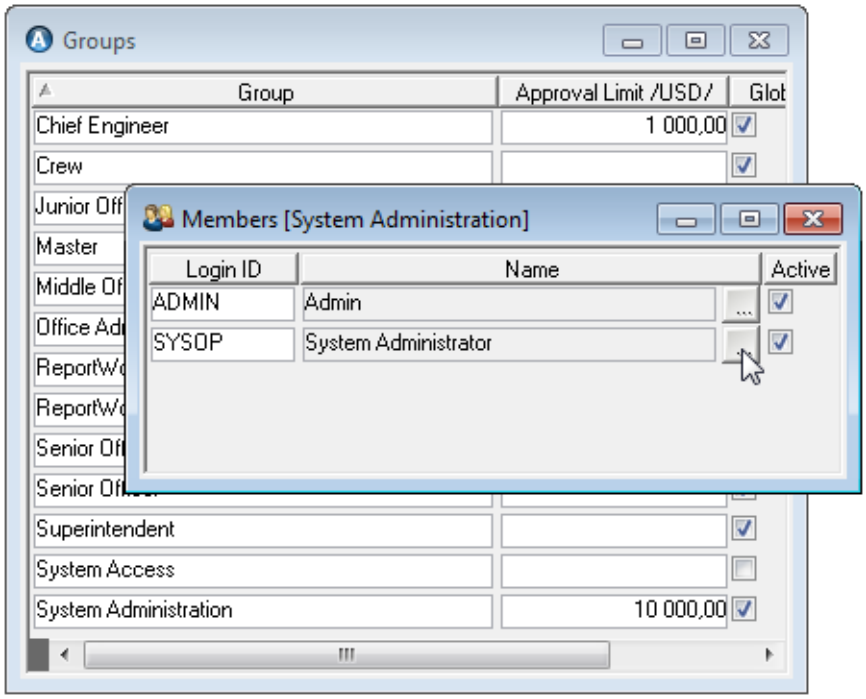
Approval limits apply to groups and not to individual users. Any user can approve purchases at a level less than or equal to their group's approval limit. If the same user belongs to several groups, then the highest approval limit of all those groups is the one that applies to the user.

Assigning Users to Groups

Every user must belong to at least one group in order to access the system.

To add a user to a group:

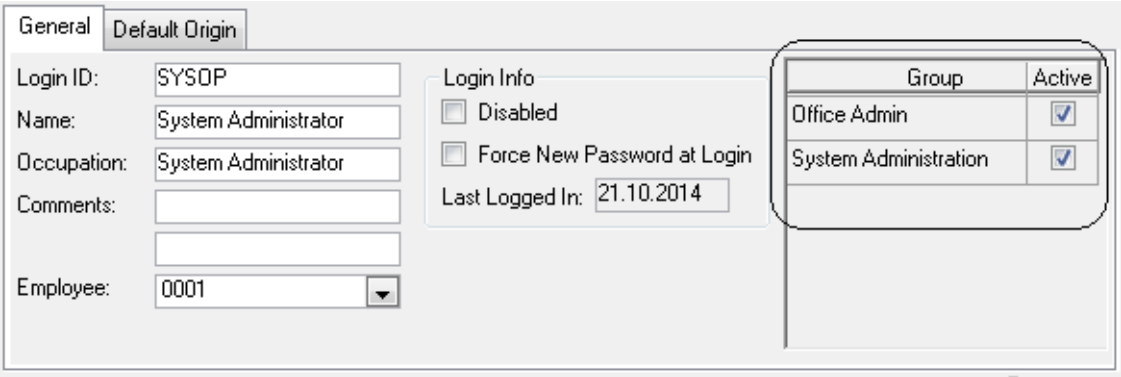
1. Open the Groups window and select a group to add members to.
2. Go to **Options > Members**:



3. Click **New**. Lookup and select a user.
4. **Active** is flagged by default and indicates that the user is a current group member.

5. You can temporarily restrict access by unchecking the **Active** box[1]. This deactivates the user within the selected group *only*: to disable the user system-wide, check the **Disabled** box in the User window.
6. **Save** the window.

The groups a user belongs to are shown in the Users window:



To remove a group member, select the group and open the Members window. Delete the user's name or unflag the **Active** checkbox. The user will no longer have that group's access rights.

It's possible to manage a user's group membership in the Users window too. Changes in the Users window will update the Members window and vice versa.

Setting Group Access Rights

Each AMOS user's access to the system is determined by the group(s) he/she belongs to. Access rights are configured from the Groups window > Options menu:

Job Class Access

When job class access is applied to a user group, the group's members will be able to see job classes, job descriptions and work orders, but will only be able to report work against jobs belonging to the classes flagged for their group:

1. Select a group in the Groups window.
2. Go to **Options > Job Class Access**.
3. Check the boxes beside the classes you want this group to have access to.
4. **Save** the window.

» As soon as you flag a job class, only that group's members will be able to report work against jobs belonging to the flagged class. Users from all other groups will *not* be able to report work for these jobs (unless it is added to their group's job class access list as well).

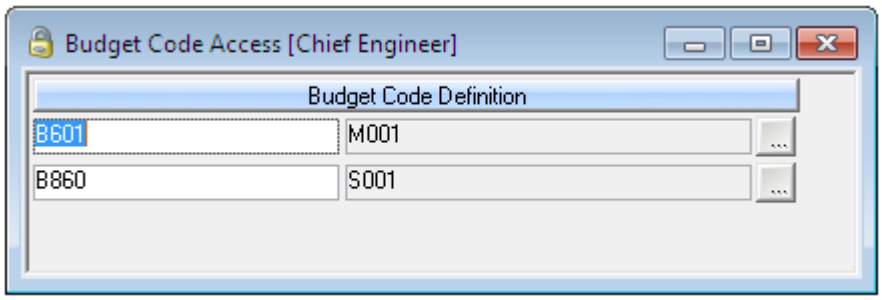
» Job classes not attached to any group will be available to all groups.

Budget Code Access

To assign budget code access:

1. Select a group in the Groups window.
2. Go to **Options > Budget Code Access.**

[1]The groups a user belongs to will also appear on the Users window. The same 'Active' checkbox is available there and flagging/unflagging it will activate/deactivate the user within the selected group only. Changing the setting of the checkbox on either window updates the other.



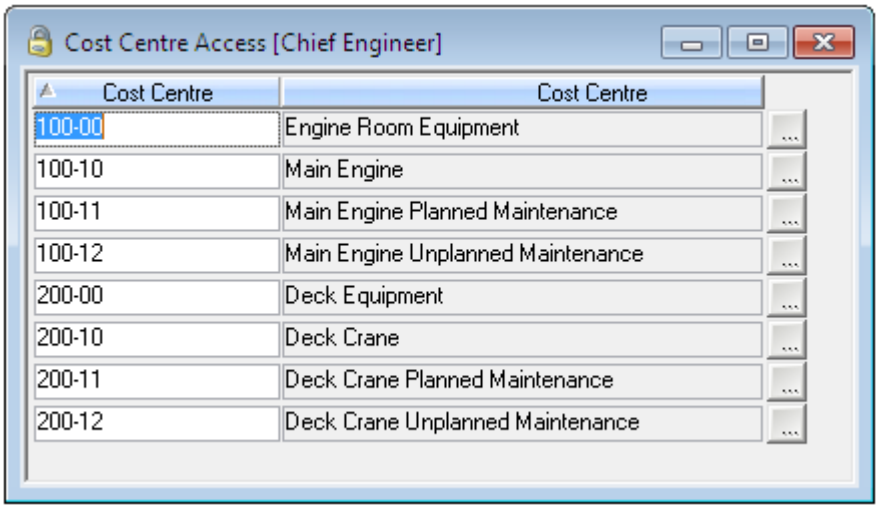
3. Click the **New** button and lookup a budget code. This grants access to the budget code for the selected user group.
4. **Save** the window.

Until you start granting groups access to budget codes, all budget codes are accessible by all groups:

- If access is granted to no groups, all groups have access.
- If access is granted to all groups, all groups have access.
- If access is granted to some groups, only those specified have access. Users from all other groups will not be able to use or even see it.

Cost Centre Access

Users can only access cost centres attached to their group. So if the cost centre 'Engine Room Equipment' is removed from the list in the illustration below, users in the group will not be able to access it.



To grant access to cost centres:

1. Select a group in the Groups window.
2. Go to **Options > Cost Centre Access.**
3. Click the **New** button and lookup a cost centre. This grants access to the cost centre for the selected user group.
4. **Save** the window.

Note: The cost centre access setting is only available if your system license includes the accounting module.

Procedure Category Access

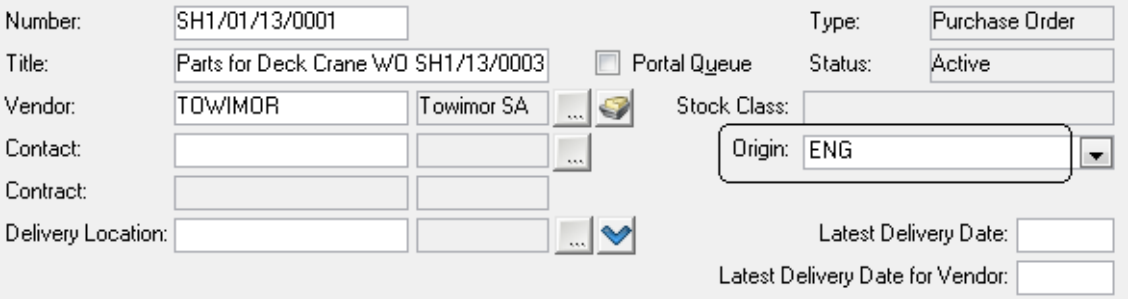
Any user group can have access to multiple procedure categories:

1. Select a group in the Groups window.
2. Go to **Options > Procedure Category Access**.
3. Click the **New** button and choose a **Category Name**.
4. Flag access rights.
5. **Save** the window.

Order Form Origin Access

Note: Access to order form origins and default origins can be defined at group level or at user level. It is not necessary to define settings in both areas; if you do, AMOS considers the logged in user's settings at user level first and then at group level second.

A purchase form in AMOS can be created for any department in the system. The **Origin** field on the Forms window indicates the departmental division the selected form belongs to:



Read about setting up and applying order form origins to forms in the *AMOS M&P User Guide*.

When a user belongs to a group with a **Default** origin, that origin will appear on any new forms he/she creates.

To set default form origins and access:

1. Select a group in the Groups window. Go to **Options > Order Form Origin Access**.
2. The Order Form Origin Access window shows a list of available origins[1].
3. Flag the **Active** origins the group can access.
4. Flag one entry as **Default**. This origin will appear by default on forms created by users belonging to this group.
5. **Save** the settings.

How Does it Work?

If you do not set any default origins at user level, AMOS will look for a definition at group level. If no origin is set on the group either, or the user belongs to more than one group and has no user-level default, the origin on newly created order forms will be left blank.

As soon as you have assigned one or more origins to a user or his/her group, he/she can only edit forms coming from those origins, as well any forms without an origin assigned. To edit any purchase form regardless of origin, users must belong to a group with access to 'Allow editing forms of all origin' on the Access Control window Functions tab.

Users can change the origin on a form to another origin they have access to.

Stock Class Access

To assign stock class access:

[1] Setting default origins and access requires that a list of available origins has been defined in the register at File > Open Register > Purchase > Order Form Origin. Read about setting up and applying order form origins in the *AMOS M&P User Guide*.

1. Select a group in the Groups window.
2. Go to **Options > Stock Class Access**.
3. Click the **New** button and lookup a stock class. This gives the group access to the selected stock class.
4. **Save** the window.

» As soon as you add a stock class to a group, only that group's members will be able to see and use it. Users from all other groups will *not* be able to access that stock class (unless it is added to their group's stock class access list as well).

» Stock classes not attached to any group will be available to all groups.

Note: Stock Class Access settings are only available when the parameter 'Use Stock Class Access' is set to TRUE.

Department Access

Flagging the **Global Access** checkbox in the Groups window next to a group gives the group access to all defined installations and departments in the system. Once flagged, you cannot assign or remove access to selected departments: **Options > Department Access** is not available.

To limit a group's access to selected departments:

1. Select a group. Uncheck the **Global Access** box.
2. Go to **Options > Department Access**.
3. Flag the departments the group can access.
4. **Save** and close the window to return to the main Groups window.

Note: Another way to limit Department Access for Users in any Group is to take away their ability to switch Departments (**Access Control window > Functions tab > Switch Department**). This limits them either to the Start In Department or the Department they have access to via the command line parameters.

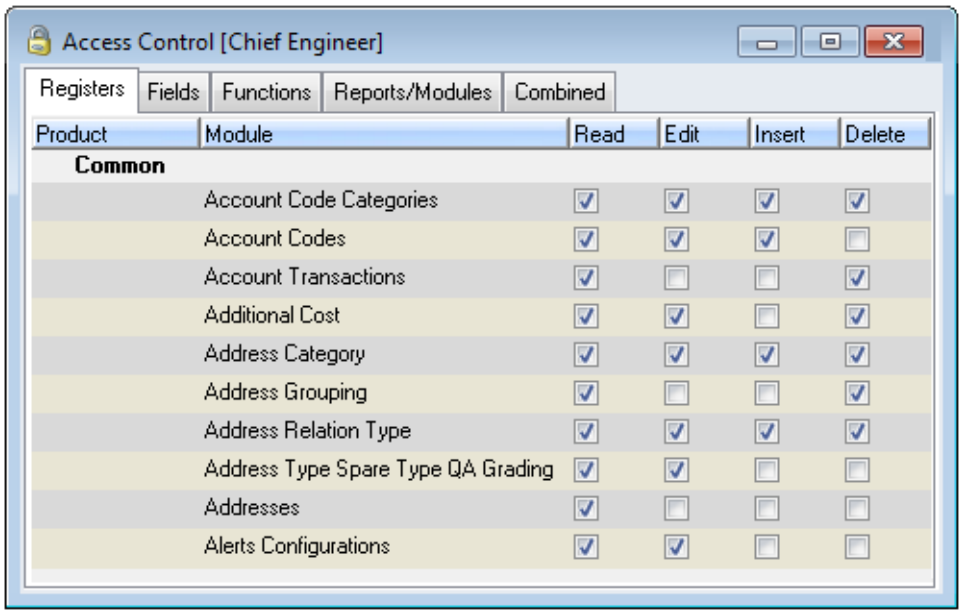
Access Control

Note: See the Appendix 'Access Control Listings' at the back of this guide, for a complete list of all the access settings available in the Access Control window Registers, Fields, Functions, and Reports/Modules tabs. The settings are listed in the same order as they appear in AMOS.

Fine tune access levels for each user group in the Access Control window[1]:

1. Select a group in the Groups window.
2. Go to **Options > Access Control**:

[1] If your system license includes the Personnel modules, the Groups > Options menu will also contain the item Access Control Personnel. This window works in the same way as the Access Control window, only in regards to Personnel module-specific registers, fields, functions and reports/modules.



3. Flag settings in each tab; **Save** and exit the window.

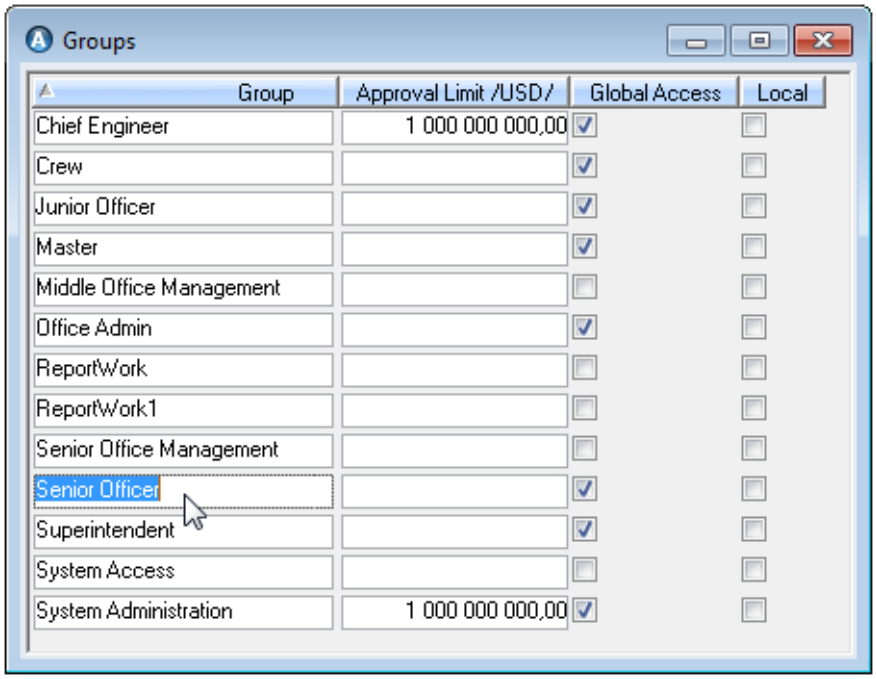
Copying Access Configurations

You can copy entire access control setting configurations from group to group; or select parts of a configuration to copy.

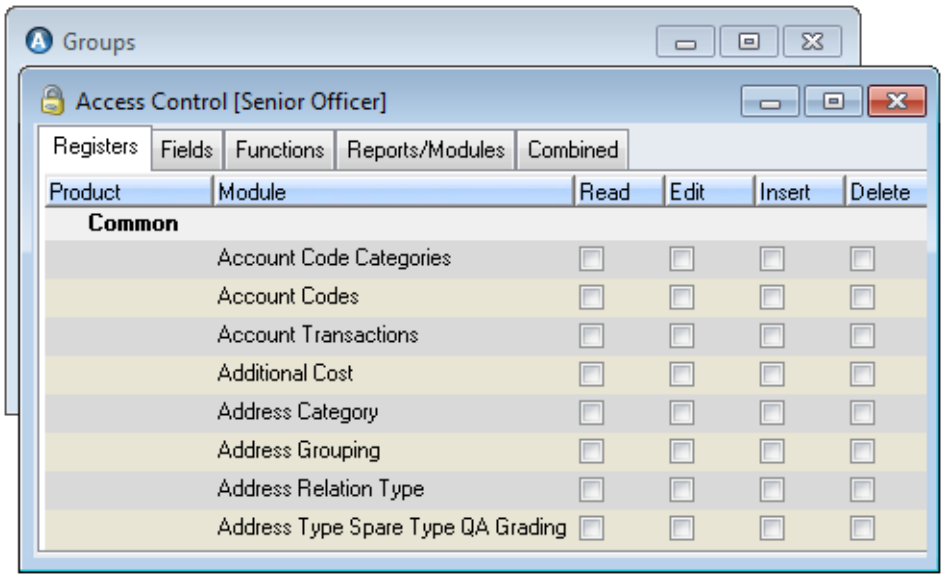
> **EXAMPLE**
>
> You have already defined the complete access control configuration for the group Chief Engineer and you want to copy the majority of these settings to the group Senior Officer.

To copy access control settings from the Chief Engineer group to the Senior Officer group:

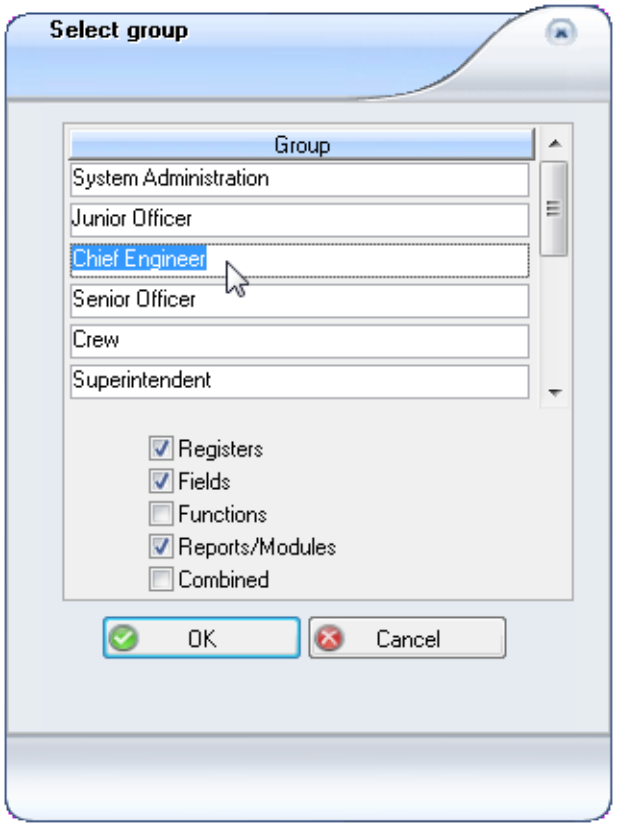
1. Select the group to copy *to* in the Groups window - the Senior Officer group:



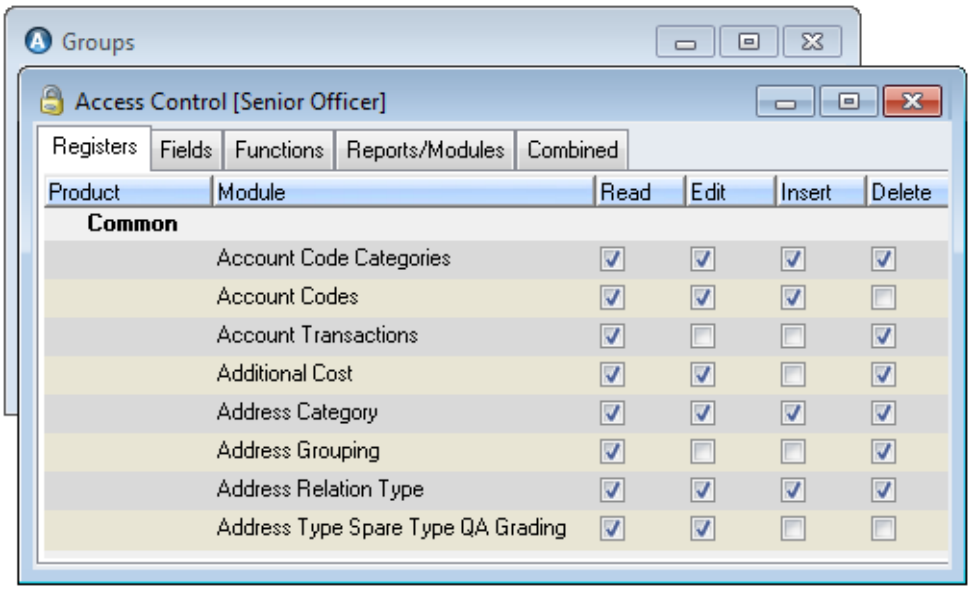
2. Go to **Options > Access Control** to open the Access Control window:



3. Go to **Options > Copy from Group**.
4. A dialog containing all the groups opens. Choose the group whose rights you want to copy *from*:



5. Flag the access control tabs you want to copy settings from.
6. Click **OK**. You return to the main window and the Senior Officer group now has settings matching the Chief Engineer group, for the tabs you flagged:



7. **Save** the window.

Registers Tab

The Access Control window Registers tab contains an alphabetical list (separated by module) of all registers in AMOS Business Suite.

Note: The access controls in this section control visibility of and access to the main window(s) listed for each one. All tabs and sections within the window or subsequent dialogs opened from the main window are covered by the same access control unless an overriding exception (on a field or function, for example) is present. Such exceptions have their own access controls and are listed in the appropriate table.

Fields Tab

The Access Control window Fields tab is for granting access rights to individual fields throughout the system.

Functions Tab

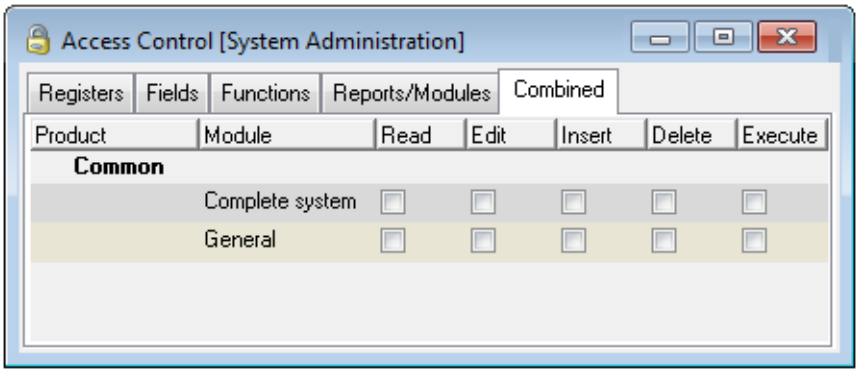
The Access Control window Functions tab is for granting rights to execute individual functions throughout the system.

Reports and Modules Tab

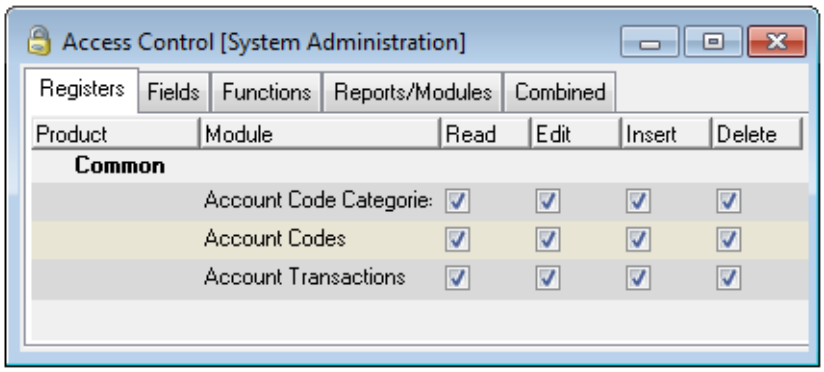
The Access Control window Reports and Modules tab is for granting rights to run standard reports and user-defined reports and external modules.

Combined Access

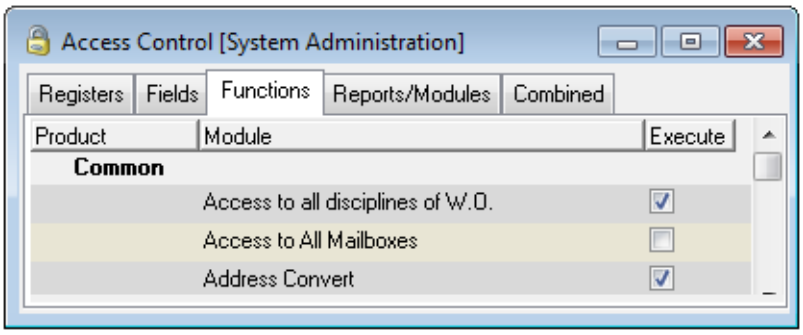
Understanding the Access Control window Combined tab is key to understanding access rights in AMOS. There are two rows: **Complete System** and **General**. Each row has five columns of checkboxes: **Read**, **Edit**, **Insert**, **Delete**, **Execute**.



The Registers tab in the Access Control window also has checkboxes for Read, Edit, Insert and Delete, but no Execute checkbox:



The Fields, Functions and Reports/Modules tabs all contain Execute checkboxes, but no other columns:

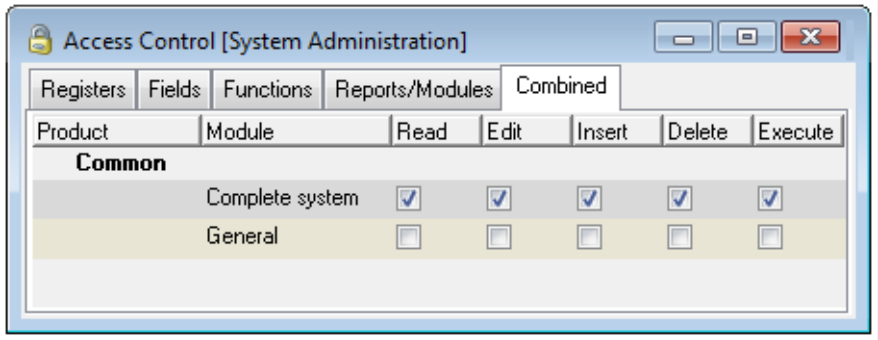


Complete System. These four other tabs correspond to the Complete System row in the Combined tab. If you give a user group Read access to the Complete System, they will have access to all the registers on the Registers tab. By default, they will have Read access on the filter for each register. If you give a group Execute access to the Complete System, they will have access to all Fields, Functions, and Reports/Modules, as well as the ability to Insert and Delete data in all registers.

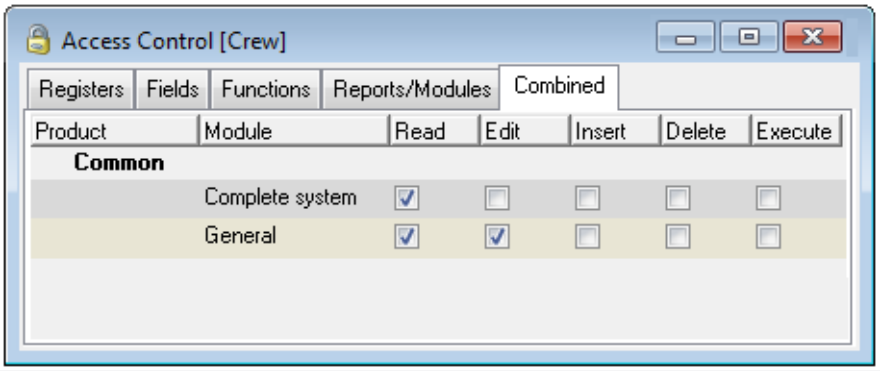
General. The General row in the Combined tab corresponds to any data windows - such as filters, error messages, printer messages, DBMS, etc. - which do not have a specific access control entry in the Registers tab. All user groups need at least Read and Edit access to the General row to allow them to make changes to filters. If a particular filter - like the Address filter - was not bundled together with the Address register, searching for a delivery address in the Forms window would not work if the user did not have access to the Address register. A separate address filter would be required for each instance of its use.

EXAMPLE

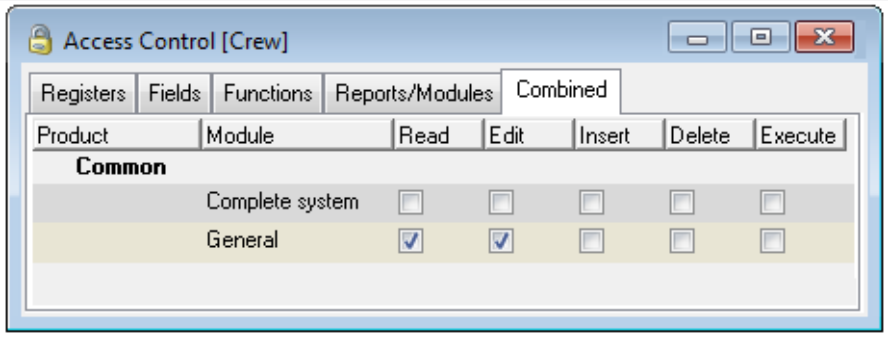
All five boxes are typically checked for the line Complete System[1] to grant the System Administration group all necessary rights:



To assign Read Only access for the entire system to a user group, the minimum access rights required are Read access to the Complete System and Read and Edit access to General:



To restrict this same user group from certain areas altogether, you would give Read and Edit access on General (but no access to Complete System):



Then, you would set access on the individual Registers, Fields, Functions, and Reports/Modules they can see, in each of the four tabs.

Keep in mind that *access rights are cumulative*: having either Insert or Delete access to a particular register implies that the users in that group will also have Read and Edit access to the register. However, assigning Delete access does not give Insert access by default or vice-versa.

[1] 'Complete System' is generally only defined for the System Administrator group, and so bypasses all the other Access Control window tabs for that group.

Tab and Field-Level Access

Define additional access rights at tab and field level to further restrict the visibility and editing of fields in AMOS:

- set certain tabs/fields to read only or editable, or
- hide certain tabs/fields altogether.

How Does it Work?

Tab and field level access settings apply to everyone, taking the logged in user's own access rights into consideration.

Access rights are always propagated in such a way as to limit access. If no access restrictions have been placed on a field, all users will have access to this field as usual according to their own access rights. If a field is set to editable but the logged in user has read-only access to that window, the field remains read-only for that user. Only the users who have been granted access to a protected field will be able to read or edit it. All other users will be unable to access such a field, even if they have access to the window it is in.

To configure field-level access:

1. Create an access grouping and add fields/tabs to it. See "Creating an Access Grouping and Adding Fields/Tabs" below.

   To completely customise the access on a field you can define an expression to allow editing only if the condition in the expression is met. See "(Optional) Defining Access Expressions" on page 105.

2. Grant collective user group access. See "Granting Access to Protected Fields" on page 363.

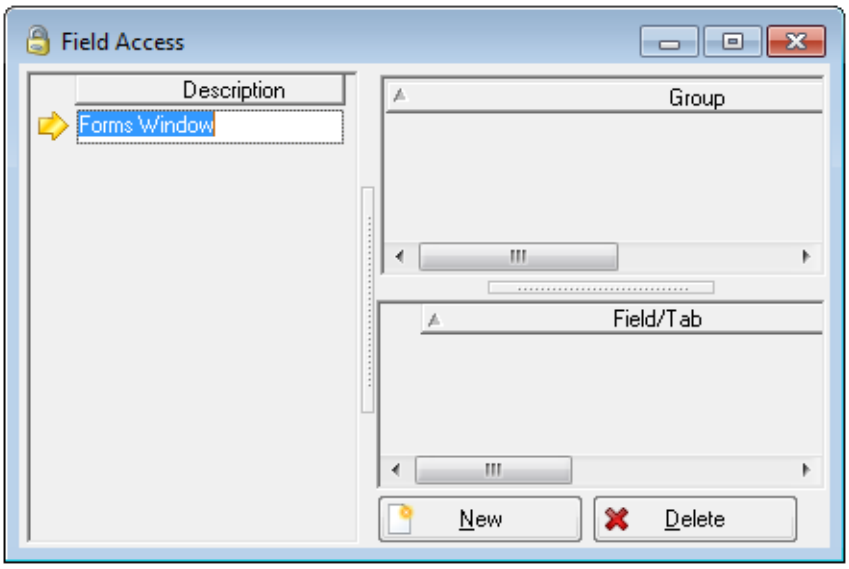
Creating an Access Grouping and Adding Fields/Tabs

Create access 'groupings' to apply access collectively to all fields and tabs inside the grouping.

> **EXAMPLE**
>
> You create several access groupings by window name, like Component Window, Purchase Form Window, Work Order Window, etc. Then you add fields and/or tabs from inside of each window to the relevant grouping.

Creating an Access Grouping

1. Go to **Tools > Configuration > Access Control > Field Access**.
2. Click **New** on the toolbar.
3. Add a name for the grouping to the **Description** field:



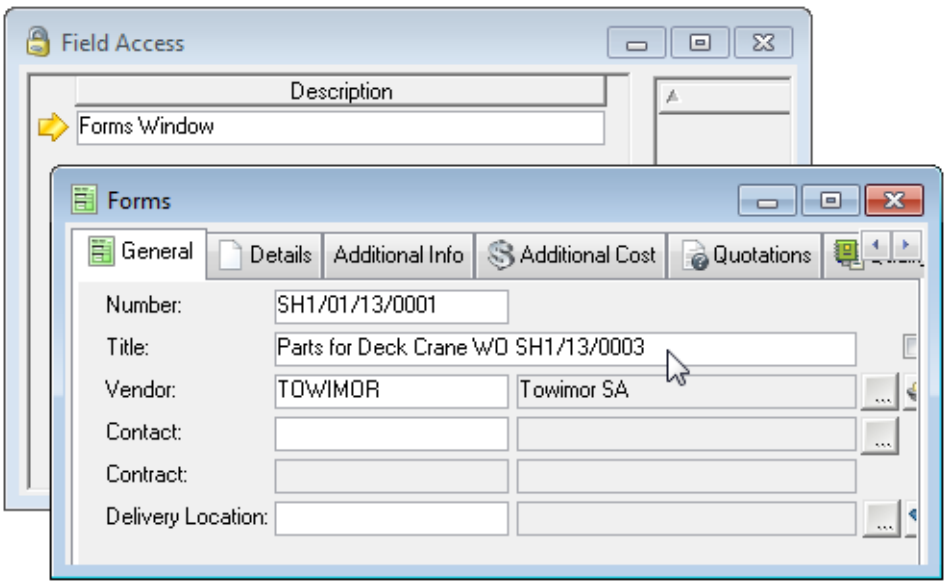
4. Click **Save**.

Adding Fields and Tabs

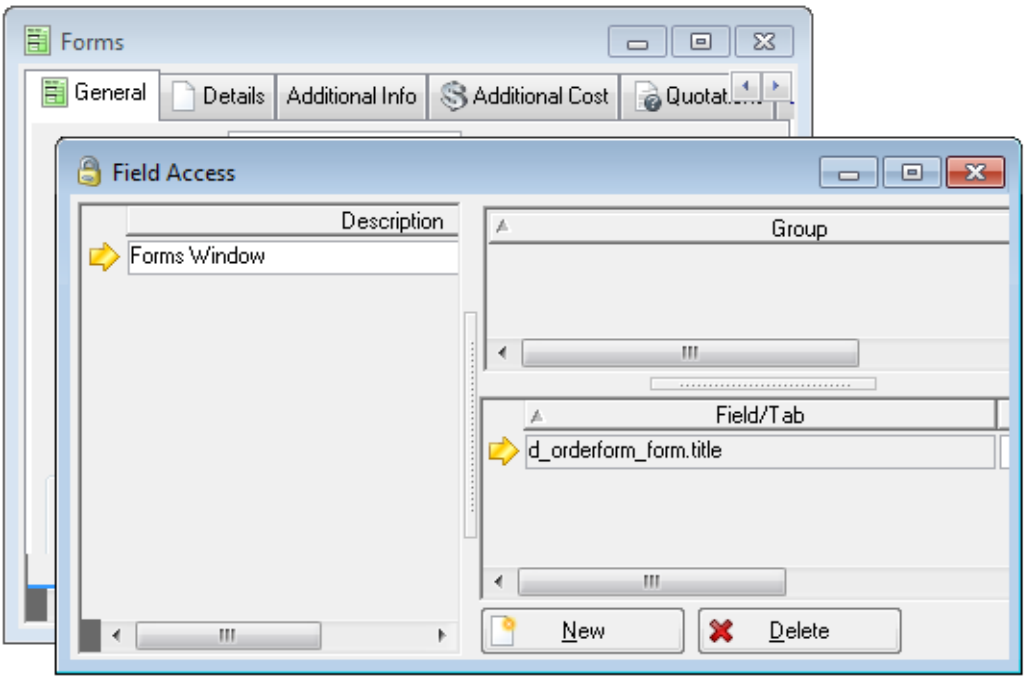
There are two ways to add a field or tab reference to an access grouping: by 'point and click' or 'drag and drop'.

Point and Click

1. Select a grouping in the Field Access window.
2. Keeping the Field Access window open, open up another window and click in any field or tab:



3. Return to the Field Access window and click the **New** button at the bottom of the right side of the window. The reference for the field/tab you just clicked will be listed:



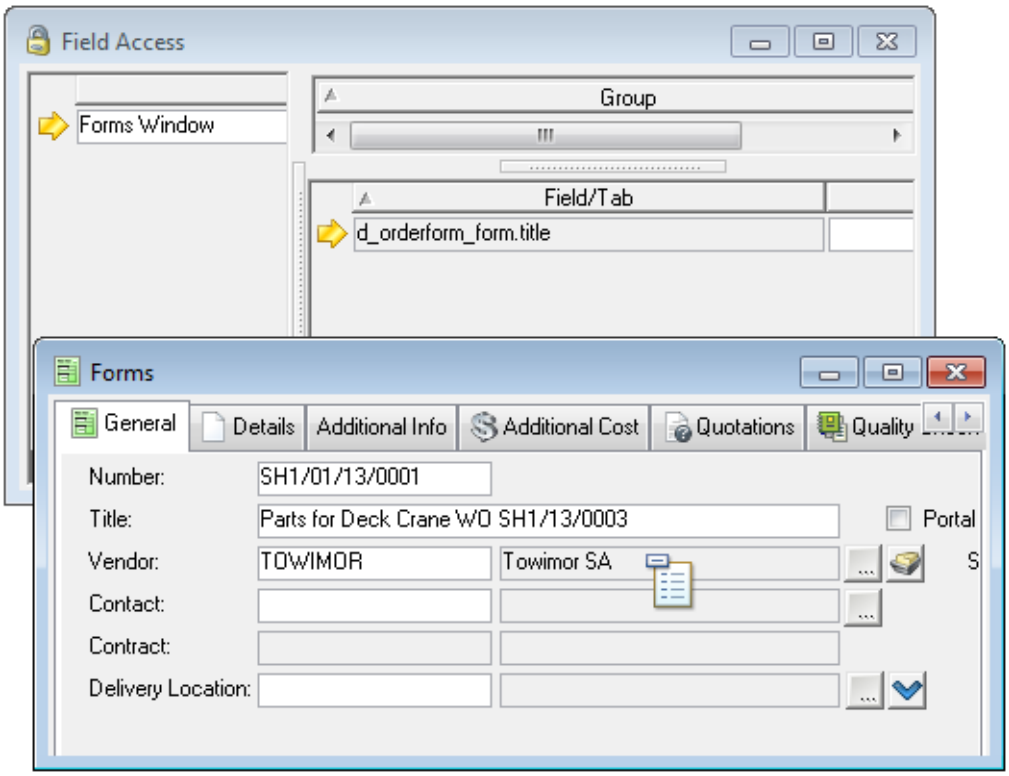
Repeat to add as many fields as you need. Add a tab by clicking on the tab header itself and then clicking **New** in the Field Access window.

4. **Save** the Field Access window.

Remember: when you click the **New** button to automatically adds the last field/tab you clicked in outside this window.

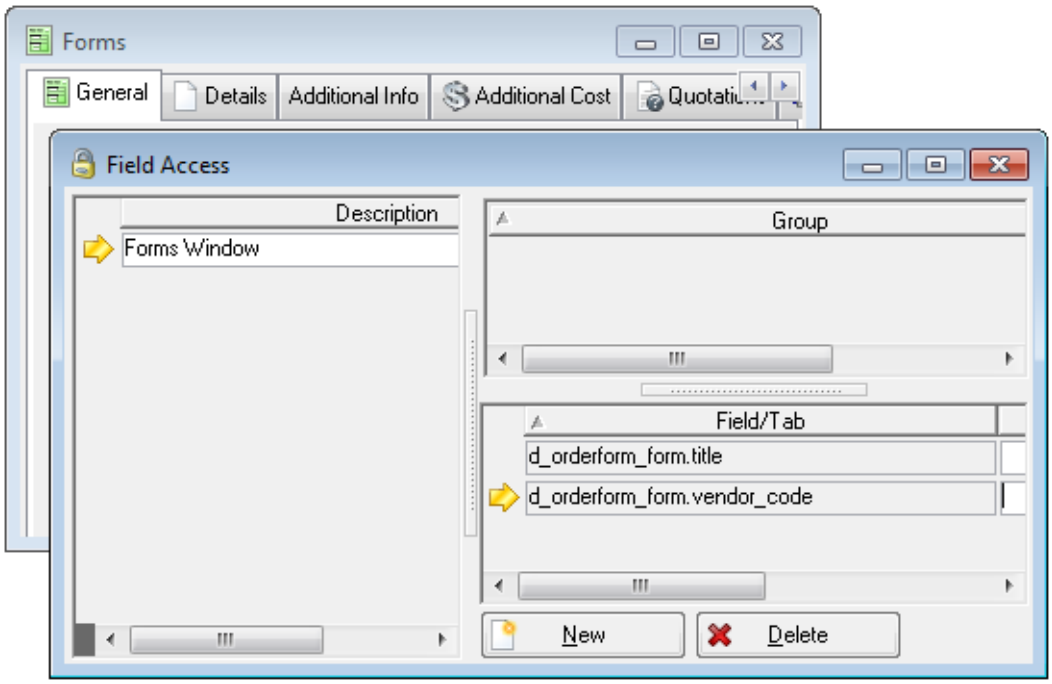
Drag and Drop

1. Select a grouping in the Field Access window.
2. Keeping the Field Access window open and visible, open up another window.
3. Click in a field and drag and drop it into the Field/Tab section on the right side of the Field Access window:



This only works for fields, not tabs.

4. The reference to the field will be listed:



5. **Save** the Field Access window.

(Optional) Defining Access Expressions

To completely customise the access on a field you can define an expression to allow editing only if the condition in the expression is met.

> **EXAMPLE**
>
> You define an expression that allows a user to modify a certain field on a purchase form only if the form is a requisition. Editing that same field will be prevented if the form is a purchase order.

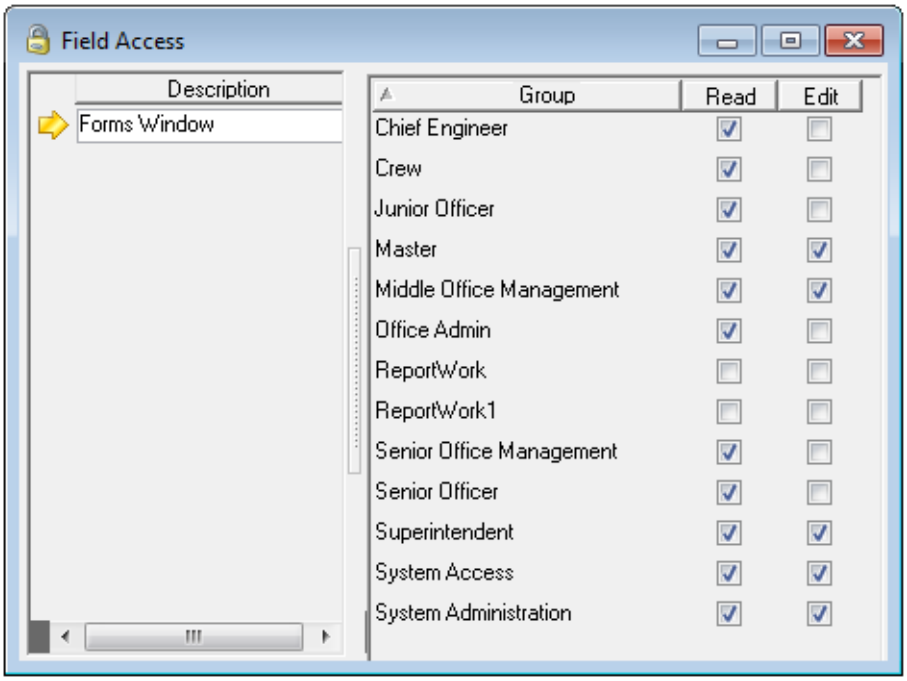
To create an expression:

1. Open the Field Access window and select an access grouping.
2. Click the **Edit if Expression is True** lookup button next to one of the listed fields or tabs.
3. Define an expression. Only columns in the same window as the selected field will be available.
4. Click the **Verify** button to test the expression to ensure it is acceptable.
5. Click **OK** to close the dialog.

Note: Users who already have **Execute** access assigned to their group will have edit access regardless of any expression defined on a field.

Granting Access to Protected Fields

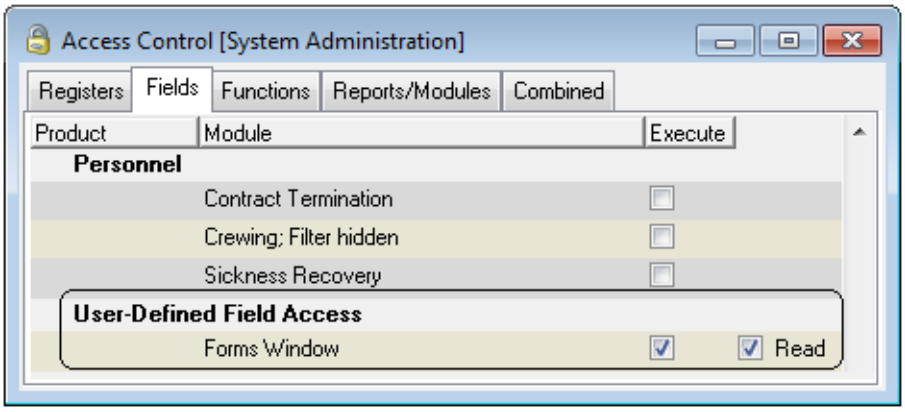
Once you add a field/tab reference to a field access configuration, it is protected and inaccessible until you grant certain user groups access to it. This can be done directly in the Field Access window: after saving the first field access configuration, user groups are listed on the right side of the window. Select a field access configuration and flag **Read** and/**or Edit** access by **Group**:



Checking **Edit** automatically grants **Read** access as well. Checking **Read** allows the user group read only access to the field grouping. The field(s)/tab(s) will be protected from everyone else automatically.

If you've already defined access on one of your field groupings and want to copy exactly those settings to another grouping, select the first one with the defined access. Go to **Options > Copy Access From** and then choose the grouping whose rights you want to copy. When you click **OK** you'll return to the main window and see the access checkboxes flagged on the selected grouping.

Defined access groupings are also listed in the Access Control window Fields tab, accessible from the Groups window:



Select a field access configuration and flag **Read** and/or **Execute** access.

How Does it Work?

- When **Read** and **Execute** are checked, the users in that group will be able to see and edit the relevant fields, according to their group access rights. If they do not have edit access on the window already and you grant edit access on the protected field grouping, the field(s) still remain read-only.
- When only **Read** is checked the users will be able to read but not edit the relevant fields even if they have Edit access rights in that window - unless an expression has been defined on the field allowing editing also.
- If you do not check **Read** (i.e. neither box is checked) the field will be completely hidden even if the group has Read or Edit access for the relevant window. In the case that a tab is defined as unreadable, set the parameter 'Hide Inaccessible Menu Entries' to True to hide the tab. Set it to False to render the tab visible but disabled.

CHAPTER 5

Configuration

This chapter includes the following topics:

System Parameters 108
Number Series 158
Work Flow 160
Remote Work Flow 170
Mandatory Fields 175
Account Transactions 176
Audit Trails 179

SpecTec

System Parameters

AMOS is a highly flexible system and can be customised in numerous ways to suit the way your company works. Setting the system parameters is one way to customise certain behaviour in the system.

AMOS is designed to handle company-wide installation and departmental separation, and caters to each groups' needs, such as special component number schemes or division of stock information.

> **EXAMPLE**
>
> It is simple to handle exceptions in the system, like a different component numbering scheme for a particular department. The system administrator simply defines the numbering scheme at the global level for the whole company, and then defines a specific one for the department in question.

To handle this division of installations and departments, the configuration parameters have a scope within which they apply. This scope can be:

- For a single department
- For all departments in a single installation
- For the entire organisation

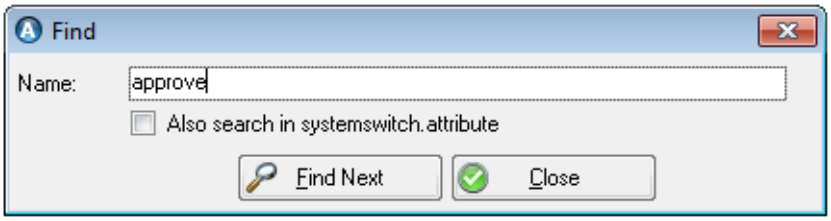
The hierarchy provides for the inheritance of parameters: if the system does not find a particular parameter setting for the current department, it automatically looks for the installation directly over the department in the hierarchy. If no specific parameter value has been set for the installation, then the system looks for and uses the value set at the global level.

Searching the Parameters Window

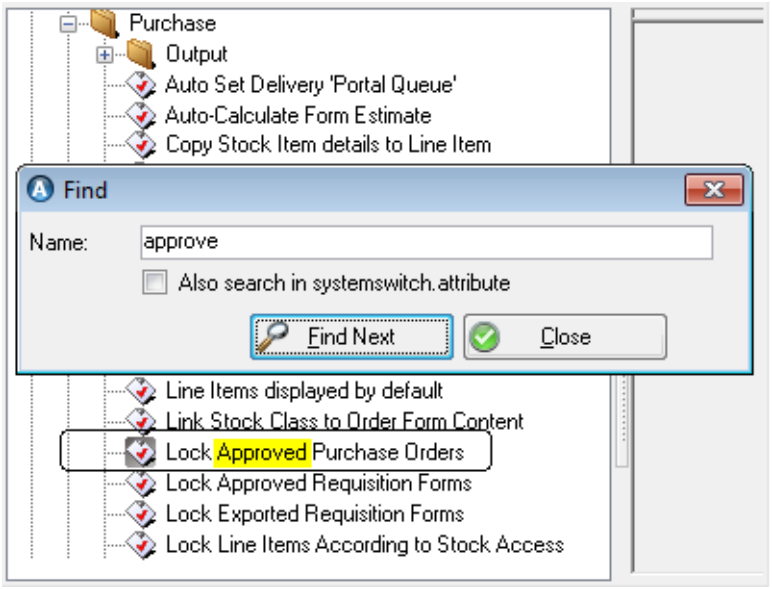
To quickly search the hierarchy and locate a parameter:

Click the **Find** button on the toolbar.

Enter any part or all of the parameter name in the Find dialog:

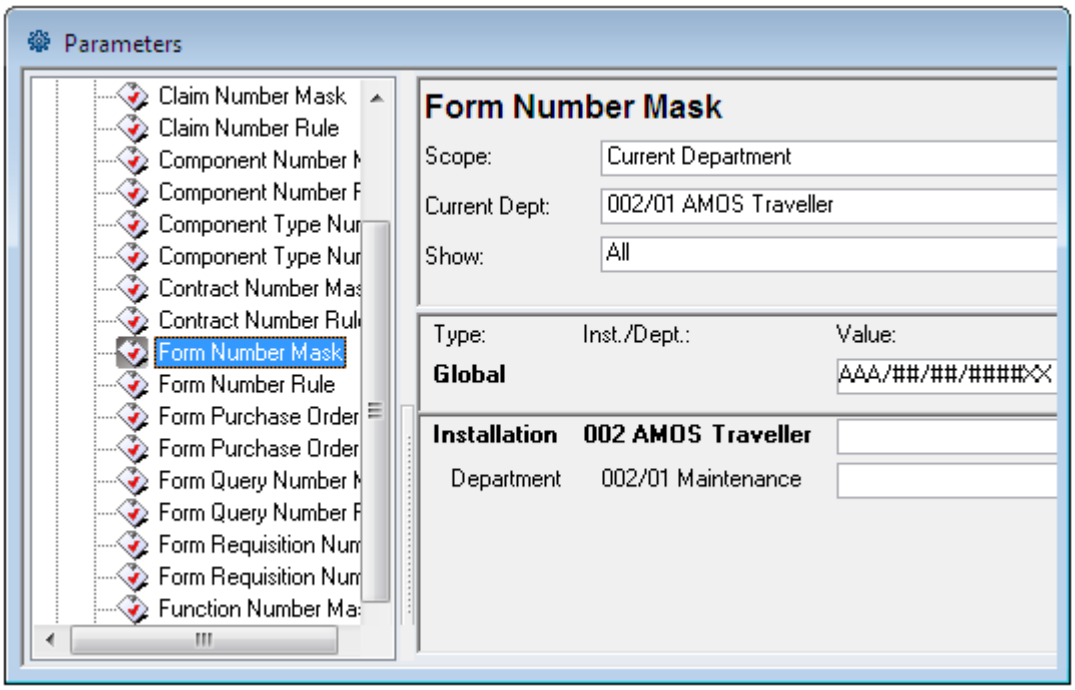


Click **Find Next**. AMOS will find the first available match and expand the hierarchy to show you:



Click **Find Next** again, to keep searching. If you don't know the name of the parameter as it appears in the hierarchy, you can flag the option to 'Also search in systemswitch.attribute'.

Auto-Numbering



This set of parameters is divided into two types: Masks and Rules. Masks control how the system displays certain fields, and which characters can be entered into these fields (e.g. input mask). Rules control the format of the system-generated numbers in 'Code' and 'Number' fields.

Note: SpecTec strongly recommends that wherever auto-numbering is in use, the relevant **Code** or **Number** field is edit protected. Protect such fields via the Access Control window > Fields tab, or, if the field itself is not listed there, you can configure field level access.

In the mask fields, the following characters control which characters are valid for each position in the number:

- **!** - Any character - any alphabetic characters are automatically uppercased by the system.
- **^** - Any character - any alphabetic characters are automatically lowercased by the system.
- **A** - Any alphanumeric character.
- **X** - Any character.
- **#** - Any numeric character.

Any other character appearing in the mask is displayed in the input field as un-modifiable positions. These separate sections of the number: for example, a typical component mask would be ###.##.##. This would give potential component numbers of 601.00.00, 712.47.01, etc. A typical address mask would be !!!###. This would give potential address codes of ALF001, SUL002, etc.

The work order, purchase form and transport document numbers have both a mask and rule as they are system generated numbers whose appearance can be controlled.

In the example above, the field Form Number mask ends with two X-es to facilitate the entry of form numbers that AMOS has split. For example, a purchase order may be split into two or more sub-forms, and in that case, AMOS adds the character A to the form number. The two X-es in the form number mask allow the user to enter this modified number.

Default Templates

A number of tables in the system contain a Details tab or a Full Description window. These tabs/windows are present in the component stock item, address, job description and order form tables among others.

AMOS provides a feature called Templates (also called Layouts), which makes it possible to define how the Details tab is presented on screen. Using templates, the Details tab can be given the appearance of a specialised input form. Templates are usually attached by selecting **Edit > Change Template**. However, these parameters make it possible to attach a template automatically on creation of a new table entry.

The Parameters window contains an entry for each table containing a Details tab/Full Description window, and allows you to select from the already defined template list which template to attach for each register.

The default setting for the fields in the Default Templates parameter folder is Empty. To define a default for a table, select the table in the list and then click the lookup button (Global/Installation/Department) to open the list of available templates and select one.

Some tables in the Default Templates parameter folder will support selection of both basic and enhanced templates as default:

- Budget Codes
- Functions
- History
- Line Items
- Noon Reports
- Order Forms
- Voyages
- Work Orders

The rest accept basic templates only.

Directories

Several important system directories are outlined here. The Installation Directory is the folder where the amosw.exe program is located. The other directories are sub-folders of this one.

Enter the path to each of the following folders.

CBM Directory

This directory defines the location where the system can find CBM day files.

Default setting: the CBM sub-folder of the AMOS Business Suite Installation.

Crew Member Document Directory

This directory defines where to store attachment files for connecting to employee records, if not in database. If the 'Store Documents in Database' parameter is set to TRUE, then do not set any value here.

Graphics Directory

This directory defines where graphic files are located. If set incorrectly, you may have trouble displaying graphic files.

Before changing this setting, consider the relationship between the 'Graphics Directory', and the two sharing parameters 'Attachment/Reference' and 'Attachment/Source'.

Default setting: the Graphics sub-folder of the AMOS Business Suite Installation.

Hand Terminal Directory

This directory defines where files generated by hand terminals are stored.

Default setting: empty.

Installation Directory

This directory defines where the system itself is installed. If this parameter is not set correctly, it can cause problems with the Import/Export module.

Default setting: the root folder of the AMOS Business Suite Installation.

Personnel Report Directory

This directory defines the directory where the standard Personnel reports are located.

Remote Workflow Directory

This directory defines the directory where HTML files queued for export, are stored temporarily before they are sent to a remote user.

Report Directory

You can tailor the appearance of a standard work order, planned maintenance work order, purchase order, requisition form, query and transport document printouts. This parameter defines the directory where these tailored reports are located.

Default setting: the Reports sub-folder of the AMOS Business Suite Installation.

Transfer Directory

This directory defines the location where selection files and import files are found, and where generated export files are placed.

Default setting: the Transfer sub-folder of the AMOS Business Suite Installation.

Validate Directory Availability

When set to TRUE AMOS will run a check at logon and upon switching departments, to determine if the current user has at least read only access to every directory defined in the Directories folder and to the %temp% folder. If any directories are unavailable to the user, AMOS will present a message listing them.

The user can then click OK to continue, or IGNORE to prevent any further messages about availability during the current session.

Set to FALSE, AMOS will not check for directory availability.

Default setting: FALSE

Attachment Parameters

Attachment File Stamp

When a file is attached to a record in AMOS, its date may require resetting. This parameter controls if the date on attachments should be updated or not.

When an attachment which is not stored in the database is added either by drag and drop onto an Attachments tab or by insertion in the Attachment References window, AMOS will refer to the setting of this parameter to determine if the date and time on the file should be left as is, or updated to match the date and time found on the database server.

Default setting: LEAVE AS IS

Attachments - Attachments File Operation

Set this parameter to determine the system's action when a user tries to add an attachment which is not already stored in the Graphics folder for that installation:

Set to WARN the user will be simply be warned that the attachment is not yet in the installation's Graphics folder. Set to COPY, the attachment file will be copied automatically to the Graphics folder without a user message. Set to MOVE, the file will be moved to the Graphics folder without a message to the user. Set to ASK, a dialog appears and the user can decide whether to Leave the file where it is, Copy it to the Graphics folder, or Move it there.

Default setting: ASK

Attachments - Attachments Maximum Size

Use this parameter to set the maximum size (kb) for any attachment used within the system. No value means no restrictions apply.

Default setting: None

Attachments - Attachments Oversize Action

When set to WARN, if a user tries to add an attachment which exceeds the size allowed by the parameter 'Attachments Maximum Size', the user will receive a warning message indicating that the attachment exceeds the maximum and allowing them to choose to proceed, or not. If this parameter is set to PREVENT, and the user tries to add an oversize attachment, they will be stopped from adding the attachment.

Default setting: PREVENT

Attachments - Attachments Store in Database

This parameter gives the user the option of storing a dragged and dropped attachment in the database upon insertion. For files stored in the database, the associated Attachment Reference will have the checkbox 'Store in DB' marked automatically and the file stored in the ImageFile table.

When set to ALWAYS or NEVER, the file is always or never stored in the database. When set to ASK and a user attempts to drag and drop an attachment, a dialog appears asking if the file should be stored in the database or left at its current location.

Default setting: NEVER

Dashboard Parameters

Dashboard - Alerts Maximum Size

Setting this parameter determines the length of the longest bar(s) in the dashboard Alerts Overview. When you select AMONG ALL ALERTS, the system takes the maximum value of the greatest alert and scales all of the other alerts down accordingly. When you select PER GROUP, the system takes the maximum value of all the alerts in each group, makes the length of each bar the same, and scales all of the other alerts within the group down accordingly.

Default setting: AMONG ALL ALERTS

Dashboard - Manual Refresh Only

AMOS automatically refreshes dashboard alerts at login and upon switching departments even if the check interval is set to 0 (off). Setting this parameter to TRUE will prevent all automatic refreshing of dashboard alerts at startup, department switch and the timed refresh interval set on the User Option 'Mailbox/Dashboard Check Interval'.

Default setting: FALSE

Dashboard - Use Separate Retrieval Thread

Set to TRUE, the system will perform the dashboard alerts calculation and data retrieval in a separate thread. A service application will run and manage all dashboard related database access separately, reverting back to AMOS with the results. This enables the user to continue to work without being interrupted by dashboard operations.

Set to FALSE, the same work thread within the application is used for these dashboard operations.

Default setting: FALSE

Database Parameters

Database - Compatible To Version

Since different versions of AMOS may have different field lengths on certain fields, this setting allows you to maintain compatibility between different versions of AMOS that may be installed throughout your company. The standard setting for this is CURRENT, that is, the current version of the system. However, if you have one site that has not been upgraded to the current version, you will need to set this parameter to whatever version is in use at that site.

Note: It is important that all your installations of AMOS are of a compatible version to ensure that there are no replication errors due to different column widths.

Database - DB Error Text Marker

This parameter will allow you to specify custom error messages that will appear when you add triggers to the database. The character(s) you enter here will indicate the beginning and end of the error messages you want to appear.

Default Settings

These parameters specify the default values for data created within the system.

Default Settings - Budget Code Status

When you create new Budget Codes or generate new ones on a yearly basis, each budget code will start with a default status. This setting specifies that status.

1 PARKED

2 PRELIMINARY

3 APPROVED

Default Settings - Budget for Component Job

This parameter determines the search order when checking for a component job's default budget code. The default setting is MAINTENANCE TYPE, COMPONENT which means that the default budget code is taken from the maintenance type if one exists. Otherwise the budget code for the component is used. This other setting is the reverse search order of COMPONENT, MAINTENANCE TYPE. This only applies if the Accounting module is not being used.

Default Settings - Default Status On Component Transfer

In a centralised database it is possible to transfer Components from one site to another. This parameter controls the default value for components when transferred from one department to another department. The status is applied at the time of transfer and is visible as the component status in the receiving department.

In other words, as long as a component is not In Use you can change its status to Transferred, and then transfer it to the awaiting site where it will receive the status set here.

Default setting: Available

Default Settings - Default Value Mark Work as Completed

This setting determines whether or not the 'Mark Work Order as Completed' checkbox is checked by default when a User chooses to report work.

Default setting: TRUE

Default Settings - Default Value Quotation Update Stock Item Field

This setting determines whether or not the 'Update Stock Items' checkbox is checked by default when a user enters a new Quotation for an Order Form.

Default setting: FALSE

Default Settings - Depreciation Level

Any Stock Transaction besides purchases can receive one of five Depreciation Levels. When the Depreciation feature is activated, this setting controls the initial status of Stock Items. The default setting is 1, which corresponds to level 1, which is normally 'new,' or 0% depreciation. Up to 5 levels of depreciation can be set.

Default Settings - Form Type

A Purchasing module parameter, this value controls which type of form to create (i.e. requisition form, query or purchase order) during automatic form creation. In a shipping scenario, it is normally the case that vessels create requisition forms while shore side offices create purchase orders.

This value is usually set in conjunction with access rights on the Order Form tables to grant or limit access to create certain types of Order Forms. A user with the correct permissions would be able to create the other types of Order Forms.

Default setting: PURCHASE ORDER

Default Settings - Initial CBM Work Order Status

Condition-Based Maintenance Work Orders are initiated by day files that reside in the CBM subfolder under the AMOS Installation folder.

When the CBM (Condition Based Maintenance) module is active, this setting controls the initial status of work orders. The available options are REQUESTED, PLANNED and ISSUED.

Default setting: ISSUED

Default Settings - Initial Corrective Action Work Order Status

Corrective work orders in the Quality and Safety system are a means to track the work involved in keeping the vessel in compliance with international safety regulations.

This setting controls the initial status of corrective action work orders. The available options are REQUESTED, PLANNEDand ISSUED.

Default setting: ISSUED

Default Settings - Initial Form Delivery Option

There are four options for specifying delivery destinations on forms/quotations: Address, Location, Port and Port Call. Although values can be entered for all four on a form, the field which appears by default on new forms (and is used on the eventual order) can be selected here. Users can change this default manually in the Forms and Quotations windows. There is an exception: the default delivery destination on forms which belong to purchase contracts is always Location.

Default setting: LOCATION

Default Settings - Initial Periodic Work Order Status

Periodic work orders are standard preventive maintenance work orders based on either frequencies or counters. This is for setting the initial status of automatically created periodic work orders.

Default setting: ISSUED

Default Settings - Initial Project Work Order Status

Project work orders are created from within a project. This resolves potential conflicts of attaching work orders to a project whose statuses are different from work orders created within the project. This is for setting the initial status of project work orders.

Default setting: ISSUED

Default Settings - Initial Requisition Work Order Status

Requisition work orders are work requests, that is, ad hoc work done either on a one-time basis such as an installation, or breakdown maintenance. This is for setting the initial status of manually created work orders.

Default setting: ISSUED

Default Settings - Initial Round Work Order Status

Round work orders are groups of similar jobs that will appear on the same work order. This is for setting the initial status of automatically generated round work orders.

Default setting: ISSUED

Default Settings - Location for Stock Items

This is for defining and using multiple stock item locations. If several locations are defined in the Locations hierarchy, one can be defined as the default location, automatically attached to each newly created stock item.

Default setting: Empty

Default Settings - Maintenance Cost Account Category

This parameter helps to define the default account code for new component jobs. After the user attaches a cost centre to the component and selects to add a new component job, AMOS will select the appropriate account code based on whether one from this default category is included in the component's cost centre.

Default setting: Empty

Default Settings - Output Format for New Job Related to Components

Work orders have three print formats: List, Extended List and Work Order.

- 'List' prints only one line per job.
- 'Extended List' prints a few lines containing the most important information.
- 'Work Order' prints the full job description and all details.

Default setting: EXTENDED LIST

Default Settings - Output Format for New Rounds

Work orders have three print formats: List, Extended List and Work Order.

- 'List' prints only one line per job.
- 'Extended List' prints a few lines containing the most important information.
- 'Work Order' prints the full job description and all details.

Together with the 'Output Format' for rounds is the 'Reporting Method'. It is important to understand the impact of the reporting method because this determines the types of maintenance logs and histories recorded.

- **Simple**. Reporting via the Simple method will create one maintenance log as a repository for the history, stock used, resources used, and counter readings for all components on the round. This maintenance log will not have a component number or job code attached to it, only the round and work order numbers. The history and stock transactions will also not have component numbers or job codes attached, therefore you will need the work order number to track these down.

  All components belonging to the round will have maintenance logs, but these maintenance logs will not track individual histories, stock used, resources used, or counter readings.
- **Full**. Reporting via the Full method will create individual maintenance logs, stock transactions, histories, and counter readings for each component on the round. This is a more complete method, but can require more data entry.

Default setting: EXTENDED LIST

Default Settings - Output Format for Work Requisitions

Work Orders have three print formats: List, Extended List and Work Order.

- 'List' prints only one line per job.
- 'Extended List' prints a few lines containing the most important information.
- 'Work Order' prints the full job description and all details.

Default setting: WORK ORDER

Default Settings - Priority for new Job Related to Components

A job can be given a numerical priority of up to three digits; 1 being the highest priority and 999 being the lowest. Your organisation decides which priorities to assign.

Default setting: 5

Default Settings - Priority for new Rounds

A round can be given a priority of up to three digits; 1 being the highest priority and 999 being the lowest. Your organisation decides which priorities to assign.

Default setting: 5

Default Settings - Priority for Work Requisitions

A work requisition can be given a priority of up to three digits; 1 being the highest priority and 999 being the lowest. Your organisation decides which priorities to assign.

Default setting: 4

Default Settings - Status for New Components

This field is used to set the status of new components introduced in the system. The possible options are: (None), In Use, Available, Repair, Scrapped and Transferred.

Default setting: 3 (AVAILABLE)

Default Settings - Weight Identifier

Defines the default unit used when new component/types and stock/types are created. The same unit will also apply by default on transfer documents, transport documents and deliveries.

IMPORTANT: To avoid issues with your system, it is necessary to set a value on this parameter after upgrade.

Default setting: 0

Editor Parameters

There are two types of editor.

- 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.
- The **Enhanced** editor is a rich text editor. It allows you to perform many common formatting tasks. It is also possible to add tables and images to the detailed description window with the right-click menu. You can add hyperlinks in this editor, but you should manually alter the appearance to create the standard hyperlink appearance (blue underlined text).

The following parameters concern the text editors used in AMOS.

Editor - Additional Detail Data on Unit Level

This parameter works in conjunction with the parameter Editor - Use Additional Note Field. They determine the presence or absence of additional Details tabs in the Stock Type/Stock Item/Component Type/Component windows, when any of those windows has an enhanced template in use:

- If both parameters are set to FALSE, only one Details tab will appear in the Component Types/Components/Stock Types/Stock Item windows.
- When this parameter is set FALSE but the second is set to TRUE, two Details tabs will appear in any of these windows which contains an enhanced template.
- When this parameter is set TRUE but the second is set to FALSE, only one Details tab will appear in the Component Type/Stock Type windows, and two Details tabs (one linked to Type and one to Item) will appear in the Components/Stock Item windows.
- If both parameters are set to TRUE, two Details tabs will appear in the Stock Types/Component Types windows when an enhanced template is present. Four Details tabs (two linked to Type and two linked to Item) will appear in the Components/Stock Items windows when an enhanced template is present.

Default setting for both: FALSE

Editor - Classic Editor Font

This parameter controls the display font for all the details forms created using the Classic Editor. It is also reflected in printouts of these screens. Click the lookup button to access the font selection window. Choose the type, style and size of the font you require and click OK to select.

Fonts can be implemented at a Global, Installation or Departmental level.

Default setting: Empty (system displays Arial)

Editor - Converted Enhanced Text Type

The table ConvertedEnhancedText by default stores converted RTF data in BMP image files, and is updated whenever users change or print RTF data. To prevent the database from growing unnecessarily large, use this parameter to switch the cache mechanism off, or to select to store the RTF data images in the JPEG format which requires less space.

- If set to NONE, the cache will not be used; no data will be stored in the ConvertedEnhancedText table.
- If set to BMP, AMOS will store the RTF data images in the ConvertedEnhancedText table in BMP format.
- If set to JPEG, AMOS will store the RTF data images in the ConvertedEnhancedText table in JPEG format using compression quality 90.

Note that the ConvertedEnhancedText table is not replicated between AMOS installations. AMOS creates the data automatically as needed. To save space and remove old data from the cache it is safe to schedule a deletion of records for this table, and AMOS will again create records automatically as needed.

If you change the parameter setting from BMP to JPEG and vice versa, AMOS will change existing cache data the next time a user changes or prints RTF data.

Default setting: BMP

Editor - Max Size (kB)

This parameter is for controlling the maximum file size of details forms to avoid excessive data retrieval/replication times.

The size can be any amount between 0 and 1000, where the number equals the maximum file size in kilobytes for each details form in the system. If 0 is selected there is no limit on the file size.

Use care when applying this limit because it will be applied to each detail form instance. This means that if you set the limit to 1,000 kilobytes (1 megabyte) and the limit is almost reached on 1000 detail forms, the amount of data to be replicated will be 1,000,000 kilobytes (1 gigabyte).

Note: Due to file conversion limitations, the maximum bitmap image file size is slightly less than half of the designated amount in this parameter. If the parameter is set to 1000, the maximum bitmap size is 499 kilobytes. Other image formats may be inserted, but any image compression will be removed upon insertion and that the maximum size may be reached unexpectedly.

Default setting: 0 (unlimited)

Note: Due to a feature in the Enhanced Editor functionality, if an image is to be added to the page the user MUST also include a minimum of one text character or space. If an image is added to an otherwise empty editor page, it will disappear when an attempt is made to save the change.

Editor - Enhanced Editor Defaults

This parameter allows you to define default values for the font and page size applied wherever the enhanced editor is in use.

- Click the **Page Setup** button to define the margins and page size.
- Click the **Font Setup** button to define the font size, style and colour applied wherever the enhanced editor is in use.

Existing text will not be affected by any changes to this parameter; only new and empty enhanced text will follow any updated settings.

Editor - Type Common

This parameter determines the type of text editor used in Details windows in the AMOS framework areas, for example the Registers. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Custom Clearance

This parameter determines the type of text editor used in Details windows within the Custom Clearance areas of AMOS.The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Maintenance

This parameter determines the type of text editor used in Details windows within the Maintenance and Stock related areas of AMOS. When set to ENHANCED, the option to print enhanced text content on separate pages following the rest of the printed content is added to the Print dialog in the Maintenance Work Orders window. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Personnel

This parameter determines the type of text editor used in Details windows within the Personnel areas of AMOS. This setting conflicts with the Maintenance setting for the Employee register above. If you are not using AMOS Personnel, then the previous setting is adequate. If you intend to use AMOS Personnel, then set this as desired and do not give access to the simple Employee list. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Purchase

This parameter determines the type of text editor used in Details windows within the Purchase and Budget areas of AMOS. When set to ENHANCED, the option to print enhanced text content on separate pages following the rest of the printed content is added to the Print dialog in the Purchase Forms window. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Quality

This parameter determines the type of text editor used in Details windows within the Quality & Safety areas of AMOS. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Risk Management

This parameter determines they type of text editor used in Details windows within the Risk Management windows. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type TMSA

This parameter determines the type of text editor used in Details windows within the Self Assessment areas of AMOS. The same type of editor will be set on all Details forms in this module.

Default setting: CLASSIC

Editor - Type Voyage

This parameter determines the type of text editor used in Details windows within the Voyage Management areas of AMOS. The same type of editor will be set on all Details forms in this module.

Editor - Use Additional Note Field

See 'Editor - Additional Detail Data on Unit Level', above.

Note: If you switch from the classic editor to enhanced editor in any module, modified details windows 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.

File Extensions

Note: AMOS's native import/export uses the settings in this section. Import/export carried out using AMOS Replication uses completely different settings.

These parameters allow you to set the file extensions used in AMOS.

The default settings are:

EXP - Export Files, Import Files

HTD - Hand Terminal Files

OK - Successfully Imported Files

File Extensions - Export Import Temp Character

This sets the character used for creating the file extensions on import. The import files are split into <file name>.<Temp Char><Export File Prefix>. For example, if file 00000001.EXP contained Addresses and Component Types, the files first created would be 00000001.TXT, which would hold the information being imported, in this example Addresses, and 00000001.¤CM, which would hold the Component Types.

File Extensions - File Extension for Export Files

The system maintains a sequence number for both import and export operations. Since these sequence numbers are used to name the files created by these operations, it is important to be able to differentiate between files created by export and ready for transfer to another site and those received which are ready to be imported. This is done by defining different file extensions for the various files handled by the Import/Export module.

This parameter defines the extension for export files generated by the system.

Default setting: EXP

File Extensions - File Extension for Hand Terminal Files

A hand terminal may be used to record stock transactions. The data from the hand terminal may be exported in the form of a file, which may then be imported into AMOS stock levels. This parameter specifies the

file extension for such hand terminal files.

Default setting: HTD

File Extensions - File Extension for Import Files

As a complementary parameter to the parameter File Extension for Export Files, this value defines which extension identifies files ready to be imported by the system.

Default setting: EXP

File Extensions - File Extension for Successfully Imported Files

As a complementary parameter to the previous one, this value defines which extension is to be given to import files that have been successfully imported by the system.

Default setting: OK

Portal Parameters

The following set of parameters controls the behaviour of AMOS e-Business Direct functionality.

Portal - Billing Address

Select an address code from the Address register, to define the address where purchase invoices should be sent.

Default setting: Empty

Portal - Log Successful Portal Operations

Set to TRUE, the system will store not only errors but also successful portal operations in the Portal Log.

Default setting: FALSE

Portal - Portal Line Item Reference Priority

If the value for this parameter is set to VendorRef, MakersRef the system writes the Vendor Reference value into the XML file if both values are available. If only one of the two is available, that value is written into the XML file.

If this parameter is set to MakersRef, VendorRef the Makers Reference is written to the XML file as the Identification value.

Default setting: MakersRef, VendorRef

Portal - Prevent Update of Quotation When One is Selected

If set to TRUE, the system will not be able to import quotations which have been selected - that is, which have a vendor selected. If set to TRUE and no vendor is selected, the quotation will be imported. Set to FALSE, the quotations will be available for import whether a vendor is selected or not.

Default setting: FALSE

Portal - Show Error Messages During Portal Export

This parameter, if set to FALSE, allows Portal Export to continue uninterrupted in the event of errors occurring during export. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an export error occurs and further data export will be stopped until the error message is cleared by the user.

Default setting: TRUE

Portal - Show Error Messages During Portal Import

This parameter, if set to FALSE, allows Portal Import to continue uninterrupted in the event of errors occurring during import. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an import error occurs and further data import will be stopped until the error message is cleared by the user.

Default setting: TRUE

Portal - Store Imported XML Document in Portal Log

This parameter when set to TRUE, allows you to see the imported XML document associated with the selected error message in the Portal Log, accessed via the Options menu. If set to FALSE, there will be no Options menu available and no XML documents will be stored.

Default setting: FALSE

Work Flow Parameters

Allow Work Flow On Locked Objects

If this parameter is set to TRUE, it allows the user to perform work flow actions on objects which are locked through the Work Flow definition.

Default setting: FALSE

Mailbox Notification Sent

The Work Flow Notification window is updated as new records are assigned to a mailbox. If a mailbox is shared or delegated this parameter must be set to ALWAYS to allow all users who have access to the mailbox to see the notifications.

Default setting: IF DIRECTLY ASSIGNED ONLY

Restrict Work Flow Assign To Values

This parameter, when set to TRUE, will restrict the available users in the Assign To drop down list to those that have work flow access defined for the resulting status. The list will contain all users that belong to groups with defined access.

Default setting: FALSE

Use in Maintenance

If you have developed a customised Maintenance Work Flow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Maintenance > Work Orders > Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the process sequence of work orders.

Default setting: FALSE

Use in Purchase Forms

If you have developed a customised Purchasing Work Flow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Purchase > Forms > Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the process sequence of purchasing forms.

Default setting: FALSE

Use in Purchase Quotation Compare

If you have developed a customised Quotation Compare Work Flow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Quotation Compare Scenarios window Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the quotation comparison process.

Default setting: FALSE

Use in Vouchers

If you have developed a customised Vouchers Work Flow to replace the standard AMOS Work Flow, set this parameter is set to TRUE to use it. The Vouchers window Options menu will alter to include the Work Flow selection.

Using Work Flow allows users to pre-define and automate the process of creating and handling vouchers.

Default setting: FALSE

Use Revision

Set this parameter to TRUE to allow creating and using Work Flow revisions. Once set to TRUE and revisions have been created, the setting cannot be changed back to FALSE.

Default setting: FALSE

The following parameters control Remote Work Flow system-wide. When these are set correctly, Remote Work Flow is enabled and can be switched on or off at user level.

Remote Work Flow - HTML Type

The setting of this parameter defines the kind of HTML file AMOS will produce for use in remote work flow communications. There are two options: HTML/XML and HTML/JSON. If you select HTML/JSON you will also need to set the JSON Library.

- **HTML/XML**. AMOS produces an HTML file containing an XML data island. This requires JavaScript to be enabled within the browser and is only supported by Microsoft Internet Explorer. This has always been supported by the AMOS Remote Work Flow.
- **HTML/JSON**. AMOS produces an HTML file containing a JSON data island. This requires JavaScript to be enabled within the browser and is supported by most major web browsers, including Microsoft Internet Explorer.

Default setting: HTML/XML

Remote Work Flow - JSON Library

If you set 'HTML Type' to HTML/JSON you must define a JSON library. Several libraries are available on the Internet. For example, one such library may be found at:

http://ajax.googleapis.com/ajax/libs/jquery/1.3.2/jquery.min.js

Use this parameter to define a library and let AMOS know how to make the library available for the HTML file: either by referencing a URL or by including the library directly into the HTML file itself.

There are three values available when defining this setting:

- **INTERNAL**. Uses the java script code found internally within AMOS, and inserts it into the HTML file. This increases the size of the HTML file.
- **URL**. Links the URL you provide here into the HTML file; this will not considerably increase the size of the HTML file.
- **FILE**. Takes the java script code contained in the library file you provide here and inserts it into the HTML file. This increases the size of the HTML file produced according to the size of the

selected file. You indicate the location of the library file here. Keep in mind that AMOS does not verify the content of the file - it is inserted as it is.

Default setting: INTERNAL

Remote Work Flow - Mail Account Password

To perform work flow operations by email, the system needs to access an email account for sending and receiving those mails. This parameter is for setting the password for the user mail account.

Remote Work Flow - Mail Account User

Use this parameter to set a mail account user known to your mail server which can receive the outgoing mails from the system.

Remote Work Flow - Mail Attachment Extension

The HTML attachment sent within the email will have the file extension defined by this parameter setting. If you do not provide an extension, AMOS uses the default 'HTML'. User-defined extensions are limited to 10 characters.

Default setting: HTML

Remote Work Flow- Purchase Template

Enter the path and file name of an html page that has been customized to your company's specific format for Remote Work Flow. Perform this customisation by capturing a standard Remote Work Flow page and entering your source code in the appropriate section.

This will be presented to the user in the HTML attachment and will look similar to the normal work flow transformation dialog.

Remote Work Flow- Return Mail Address

Use this parameter to set the mail address for the system which will receive the work flow data from the remote user.

Remote Work Flow- Send Mail

This must be set to TRUE. FALSE can only be used in the setup process (to avoid sending the mail), for debugging purposes.

Remote Work Flow- Use Remote Work Flow

Set this parameter to TRUE to allow use of remote work flow in your system. Set to TRUE users will have the option to turn remote work flow on in the Options window.

Report Parameters

Report - Default Report Filter Button

This parameter is to determine which button on the Report filter should be the default when executing a report: Filter or Print Preview.

Default setting: OK

Report - Logo Bitmap used in Report Printout

If you want to include your company logo on printed reports you should use this parameter to navigate to the file you want to use. The supported file types are:

.bmp .gif .jpg .jpeg .rle .wmf

Default setting: Empty

Report - Report Use Plain Style

Allows you to choose to print AMOS reports in grey scale mode. By default the reports are printed in colour gradients. If this parameter is set to TRUE, reports will be printed in grey scale.

Default setting: FALSE

Search Parameters

These two parameters apply to the 'sound' searching capability in the filters: that is, whether the word a user types sounds like another word in the list, or not.

Search - Indicator

This character is the indicator that whatever is typed next will be a 'sound' search, that is, the word the user is looking for 'sounds like' whatever is typed into the filter.

Default setting: §

Search - Sensitivity

Set a scale for sound searching sensitivity using this parameter. Higher sensitivity indicates that the filter results must be returned as close to the sound as possible. Lower sensitivity means that more results (less closely matched) can be returned.

Default setting: 10

System Access Parameters

System Access - Account Lockout Threshold

This parameter determines the number of unsuccessful log-in attempts a user can make before being locked out of the application. If the parameter is set to zero the lockout system will be disabled. A positive number above zero should be entered if you want to use this feature. If you are using this feature you will be informed of the number of any unsuccessful log-on attempts that have been made against your user name once you log-on successfully.

Default setting: 0

System Access - Allow Windows Login Verification

Set to AMOS ONLY, only the user name and password defined in AMOS will be accepted at login. To allow Windows Login credentials change the setting to:

- WINDOWS ONLY. Only Windows credentials will be accepted at login. All users will need to have an AMOS Login ID that matches their Windows ID. Access to 'Allow Windows Login Verification' is not required.
- WINDOWS or AMOS. Allows a user whose AMOS Login ID and Windows ID match *and* who also belongs to a group with access to 'Allow Windows Login Verification', to login with Windows credentials.
- WINDOWS AND AMOS. Allows users to login with both Windows and AMOS credentials, respecting group access to ‘Allow Windows Login Verification’. In this case the system will not set users' AMOS passwords to match their Windows passwords. Then, if a user is moved to another group without access to Windows login, his AMOS password will still be valid.

Default setting: AMOS ONLY

System Access - Create Log-In Audit Trail

This parameter, when set to TRUE, creates a log-in audit trail allowing you to track system usage. Use the menu item Tools > View Log-In Audit Log to access the recorded details. There is an access control item entitled Login Audit in the Registers tab which should be used to allow viewing of the audit trail. The log-in audit log is always read-only, even if Edit, Insert and Delete access rights have been granted.

Default setting: TRUE

System Access - Disable Account Period

Setting a number here indicates the number of days of inactivity on a user account (from the last logon) that can go by before the account is disabled. If a user exceeds the number of days at their logon attempt, their account will be disabled and they will receive a message. Set to 0, this parameter is ignored.

Default setting: 0

System Access - Enforce Complex Password

This parameter determines whether complex passwords must be used or not. If this parameter is set to true, all passwords must contain at least 1 of the following:

- Upper Case Character
- Lower Case Character
- Alphabetic Character
- Non-Alphabetic Character

So, for example, an acceptable password could be Ab1.

When setting this parameter to TRUE for the first time, all users must be aware of the fact that passwords have been previously stored in upper case only. In order to change their password at their next log-in they will have to enter their old password in upper-case in order to continue.

Note: Changing this parameter to TRUE is irreversible.

Note: When running AMOS on a Citrix server and using complex passwords some conditions must be met to avoid being incorrectly prevented from logging on. If a user receives the message that AMOS is unable to log him/her in, the issue may lie in the Microsoft Windows user access setup. In this case it is advised to alter Windows user profiles status to non-Roaming.

System Access - Enforce Password History

This parameter controls how many previously used passwords for each user are retained in the system. When you are prompted to change your password, controlled by the Maximum Password Age parameter, you must enter a password that does not match one of the previously used passwords stored in the database. This also applies to the manual Change Password feature. Setting this parameter to zero will disable this feature.

Default setting: 0

System Access - Idle Timeout

This parameter allows you to set the amount of time, in minutes, for which AMOS can be idle before it locks. Once this amount of time has passed, the windows will remain open but the logon dialog will appear and the current user's password must be supplied before access is allowed again. This parameter is disabled when set to 0. If enabled, the item Lock Application will also appear on the File menu and can be manually selected at any time allowing you to lock AMOS until you return to it.

Default setting: 0

System Access - Maximum Password Age

This parameter determines the maximum allowed age, in number of days, of all passwords. This feature is disabled if the value is set to zero.

Default setting: 0

System Access - Minimum Password Length

This parameter determines the minimum allowed length, in number of characters, of all passwords. This feature cannot be disabled as the minimum length must be at least 1.

Default setting: 1

System Access - Password Backward Compatibility

With the advent of the AMOS Business Suite Version 8.2.xx, a new algorithm was introduced to heighten security. This more secure password is stored in the AmosUser.DigitalSign field in the database. Versions of AMOS prior to 8.2.xx stored the less secure password in the AmosUser.Password table. Setting this parameter to TRUE will cause both fields to be updated; setting it to FALSE will cause only the AmosUser.DigitalSign field to be updated.

Exchanging password data between systems running on incompatible versions would cause problems, therefore this parameter must be set to TRUE where this is the case. Once a site has been upgraded, it can be set to FALSE.

Default setting: FALSE

Other Parameters

Ask User to Confirm Deletions

When this parameter is set to TRUE, the user is asked to confirm the deletion of a record. If set to FALSE, no question is asked, and the record will be deleted when Save is selected.

Default setting: TRUE

Base Currency Code

AMOS Business Suite makes it possible define a base currency at the global, installation and department level. At the global level, this value determines the base against which Current Rates are recorded. In addition, it is also possible to define the default currency to be used when recording transactions and presenting reports for the various installations and departments

Default setting: USD

Note: If sites are to exchange information from the currency rates table then it is necessary for them to have the same global base currency defined.

Create Component Archive On Transfer In

A site that receives a Component from another site may want to see the Histories, Maintenance Logs, and Stock Transactions from the Component's previous sites. This parameter when TRUE allows the creation of Archive tables in receiving installations in order for the recipients to view component information created in previous installations.

Default setting: TRUE

Note: This parameter should be set to the same value as the Delete Component Archive On Transfer Out parameter.

Current Installation

This is one of the most important parameters in the system because it uniquely identifies the current installation with a number. This number must not be changed after initial definition.

Default setting: 001

Delete Component Archive On Transfer Out

A site that donates a Component to another site may want to delete the Histories, Maintenance Logs, and Stock Transactions for that Component. This parameter when TRUE allows the deletion of Archive tables in donating installations when the component is transferred out.

Default setting: TRUE

Note: This parameter should be set to the same value as the Create Component Archive On Transfer In parameter.

Edit Stock Item Currency and Price on Required Parts

This parameter controls the Currency and Price columns in the Required Parts tab of the Work Orders window. These columns default to the Last Purchase Currency and Last Purchase Price on the Stock Item. When this parameter is set to TRUE, the information in these columns is editable.

Default setting: FALSE

Enforce Rate Upon Currency Code Registration

If set to TRUE in addition to the Code, Description, and Multiplier fields, the Valid From, Entered By, and Rate fields will appear on the Currency Code window when a new record is entered.

Default setting: FALSE

Export File Encoding

Select the character set used for native import and export files. This has no impact on files sent via AMOS Replication. Use this parameter to inform the system whether it should use ANSI or Unicode, in order to assign a unique value to all characters.

Default setting: ANSI

Global Search, Limit to Department Access

This parameter controls whether records belonging to a particular department are displayed as a result of a Global Search. When set to TRUE, only the results belonging to departments to which the user has access will be displayed.

Default setting: FALSE

Global Search, Show Installation and Department Code and Name Columns

A window opened in Global Search mode shows the Inst/Dept code each record belongs to in the list view. This parameter determines if the installation and/or department name should be shown as well.

The parameter has three options: CODE, INSTALLATION NAME, and DEPARTMENT NAME. Any one, two, or all three settings can be selected at once. At least one selection is mandatory; 'Code' is set by default.

Default setting: INSTALLATION/DEPARTMENT CODE

Hand Terminal Reader

This rarely used parameter allows you to specify an interface program that will transfer data from a Hand Terminal into AMOS. The data must be in a particular format.

Default setting: Empty.

Hide Inaccessible Menu Entries

When a user does not have access to certain menu items, setting this parameter to TRUE prevents these items from displaying. Any menu items that belong to modules that are not covered by the current license will also be hidden.

If this parameter is left as FALSE, unavailable menu items will continue to appear greyed out.

Default setting: FALSE

ID Number Series

All database entries in the system are stamped with unique internal numbers. These numbers are built up of two parts, the ID number and a running counter. The ID number ensures that no two sites can generate the same internal number. The Current Installation parameter is often used to define the ID part of the internal numbers, but this is not mandatory. Once an ID number has been defined and data is entered into the database, no other installation can ever be assigned the same ID number as this would lead to duplicate internal numbers.

Default setting: 001

Limit Stock Types Selection on Required Parts on Work Orders

This parameter defines which Stock Types are displayed in the list for adding them to the Required Parts tab of a Work Order. Setting this parameter to TRUE limits the Stock Types to types of which are registered against the department owning the Work Order. Set to FALSE, all Stock Types in the Select list are displayed.

This does not prevent the Stock Item from appearing there anyway if it is a Required Part for the Component the user is reporting work against. If the Stock Type is linked to the Component Type, it is always listed as a Required Part.

It is not possible to report this part as used regardless of this setting if it is not registered as a Stock Item in the department the user is working in.

Default setting: FALSE

Open Attachments In New Window

This parameter determines how a new image is displayed when an image hotspot is clicked. If the value is set to FALSE, a new image will be opened in the currently open window, and replace the image which is there. When the value is set to TRUE, a new image will be opened in a separate window.

Default setting: FALSE

Printer Task to Use When Printing Labels

This parameter is used to select a Printer Task to use when printing labels from the Stock Items window.

Default setting: Empty

Reload DDDW When Opened

Drop-Down Data Windows (DDDW) are used to list currency codes, disciplines, units job classes etc. present in the system. The contents of these drop-down lists in a window or dialog are built when the window or dialog opens up, and are not rebuilt unless the window is closed and reopened. So if you add a new item to a list, it won't appear in the list until you close and reopen the relevant window.

If you set this parameter to TRUE, the system will re-build drop-down lists each time the list itself is opened by clicking on the drop-down arrow. This will slow down display of the list, but guarantees that the list is always complete.

Set the parameter to FALSE once you've finished configuring and setting up registers. The system will use caching and improve performance when the parameter is set to FALSE.

Default setting: FALSE

Restrict Location Codes

No validation check is performed on location codes so it is possible that duplicate location codes can exist. When this parameter is set to TRUE, AMOS will prevent users from entering a duplicated code. Set to FALSE, AMOS continues to work as before and duplicate codes will be allowed.

Default setting: FALSE

Show Modification Indicator in List Views

Set to TRUE, an additional column is added to the farthest left side in the list part of every window. When a user makes any change to a new or existing row in the window, an asterisk will appear in the extra column as a 'modification indicator' and will remain until the user saves the window.

Default setting: FALSE

Single Window Instance

This parameter controls whether or not you can have the same data window open several times. If set to true, a data window such as Components or Work Orders will only be allowed to open once. Any attempts to open the same window again will not work. If you want to view different information within the same window you can use the filter command to do so.

Default setting: FALSE

Start In Department

This parameter allows you to control which department the system logs automatically into when you start the system. When setting this parameter, you can select from a list of the defined departments.

Default setting: 001/01

Use 9 Digits For PK Counters

As of version 6.0.00, AMOS M&P (and now AMOS Business Suite) has the ability to use 9 digits for Primary Key counters as opposed to 6 digits. This parameter should be set to FALSE until all installations have been upgraded to version 6.0.00 or higher. When this has been accomplished, the parameter can be set to TRUE. The purpose of using the extra 3 digits is to avoid exhausting certain primary keys that may have high usage. New users of AMOS M&P 6.0.00 and above or AMOS Business Suite should set this parameter to TRUE.

Default setting: FALSE

Use Component Types

All Components registered will inherit information from a unique Component Type if centralisation of Component Types is chosen by setting this parameter to TRUE. When this parameter is set to TRUE, type-specific information will be greyed out on the Component screen and only users who can Edit Component Types will be able to change it.

To change this setting from FALSE to TRUE, the parameter 'Report Work, Stock Used to Updated Component Spare' must be set to NEVER.

Default setting: FALSE

Use Stock Types

All Stock Items registered will inherit information from a unique Stock Type if centralisation of Stock Types is chosen by setting this parameter to TRUE. When this parameter is set to TRUE, type-specific information will be grayed out on the Stock Item screen and only users who can Edit Stock Types will be able to change it.

Default setting: FALSE

Working Day Length

This parameter determines the amount of calculated work hours per day and can be set to any whole number between 1 and 24. Changes made to this parameter will be reflected in the timeline display for work planning: if the Estimated Duration of a job is twenty-four hours and the Working Day Length is twenty-four, then this Work Order will be done in one day. If, however, the Working Day Length is eight hours, the work will be spread out over three days.

Default setting: 24

Accounting Parameters

Account Code Type for Maintenance

This parameter defines the type of Account Codes available for the Maintenance module lockup lists and entry fields. If the parameter specifies only account code type Class of Cost, these will be the only type of account codes available. For backward compatibility (new installation and upgrade), only the Class of Cost option should be selected, and the Track Maintenance Transactions must be set to TRUE.

Your license must include the accounting module of the AMOS Business Suite.

Default setting: 3 (Class of Cost)

Track Maintenance Transactions

Set to TRUE to capture expenses for Resources Used and Miscellaneous Expenses to an Account Code.

Your license must include the accounting module of the AMOS Business Suite.

Default setting: TRUE

Track Purchase Transactions

Set to TRUE to capture Order Form expenses to an Account Code.

The current license must include the accounting module of the AMOS Business Suite.

Default setting: TRUE

Track Stock Transactions

Set to TRUE to capture expenses for Stock Transactions other than Purchases to an Account Code.

The current license must include the accounting module of the AMOS Business Suite.

Default setting: TRUE

Financial Parameters

Allow User-Defined Impact on Purchase Budget

Setting this to TRUE causes the Forecast column to appear on the Budget Overview screen and allows users to define statuses to appear in the Forecast and Committed columns. The Forecast column will appear for Stock and Maintenance class Budget Codes, but have no meaning.

Default setting: FALSE

Budget at Line Item Level

AMOS provides the ability to budget at the Order Form header level or at the individual Line Item level. This parameter has four possible values:

- NEVER. The Budget Code will always be specified at the header, that is, on the Order Form itself, and apply to the whole order.
- ALWAYS. A Budget Code must be applied to each Line Item.
- Seldom. A checkbox will appear on the Order Form: Budget at Line Item Level. If The checkbox is unmarked by default.
- OFTEN. A checkbox will appear on the Order Form: Budget at Line Item Level.The checkbox is marked by default.

Default setting: NEVER

Enforce Budget Approval

If this parameter is set to TRUE, in all lookup fields (excluding those in filters) where users can choose a budget code, the list will contain only budget codes with status 'Approved'.

Default setting: FALSE

Financial Year Early Start

Set this parameter to TRUE to allow for the early start of the financial year. Many US companies start their financial year in October.

Default setting: FALSE

Interrupt Approval Warning Limit Adjustment, When Sub-Group Exists

The Budget Hierarchy allows you to enter an Approval Warning (%) and an Approval Limit (%) for each Budget Group. If there are subgroups with their own values attached and you edit the parent Group, you have three options for what to do with these values: override (SUPPRESS WITH YES), leave alone (SUPPRESS WITH NO), or allow the user to decide (INTERRUPT).

Default setting: INTERRUPT

Month-End Close Period (Days)

Use this parameter to specify when monthly accounts are closed. For example, a value of 5 means that the accounts are closed 5 days before the end of the month.

Default setting: 0

Start Date For Financial Year

Use this parameter to set the start of the financial year according to varying world-wide practices: e.g., the UK starts its financial year on April 6th and France on January 1st. Once this date is set, it can be very complicated to change.

Default setting: 1998-01-01

Track Custom Clearance Expenses

Set this to TRUE to capture Custom Clearance Form expenses to a Budget Code. The Budget Code will be a Purchase Class Budget Code. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Track Maintenance Expenses

Set this to TRUE to capture expenses for Resources Used and Miscellaneous Expenses to a Budget Code. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Track Purchase Expenses

Set this to TRUE to capture Order Form expenses to a Budget Code. If tracking is turned on, the system checks that budget codes entered are valid. It automatically registers financial transactions against the specified budget and signals the user if a budget is exceeded by a pre-determined warning value. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Track Stock Expenses

Set this to TRUE to capture expenses for Stock Transactions other than Purchases to a Budget Code. If you change the value from FALSE to TRUE, and any budget information already existed, you will need to manually recalculate the budget figures.

Default setting: TRUE

Use Budget Control When Approving Forms

Budget Control activates the Approval Warning (%) and Approval Limit (%) that you specify in the Budget Hierarchy. Setting this to TRUE provides a warning message if the Order Form's Estimate is over the warning percentage for the Budget Group, but still allows approval; it will prevent approval if the Order Form's Estimate is over the Budget Group's limit percentage.

In order for this to work, the parameter 'Allow User-Defined Impact on Purchase Budget' must also be set to TRUE. Every Order Form in either a Forecast or Commmitted status will apply to the total at the time of approval.

Default setting: FALSE

Use External Budget Figures for Budget Approval Warning Levels

There are four columns in the BudgetGroupAccumulated table: BudgetExternal, ExpenditureExternal, BudgetInternal, and ExpenditureInternal.

The value in the BudgetInternal column comes from the accumulated budget for all Budget Codes in the Budget Group. The value in the ExpenditureInternal column accrues as Order Forms are approved.

The BudgetExternal and ExpenditureExternal columns must be populated via an interface or via the amosapi through an external application. Setting this parameter to TRUE causes AMOS to look at the two external columns for the approval warning and limit percentages.

Default setting: FALSE

Use Specification for Purchase Budget

Set to TRUE to use specifications to update figures for the Purchase budget class.

Specifications are a way to build up a Purchase Budget estimate by adding items, their estimated costs, and the period (month) in which they apply. If you use Specifications, then the Model for the Budget Code must be set to Manually Allocated Budget.

Default setting: FALSE

Use Specification for Stock Budget

Set to TRUE to use specifications to update figures for the Stock budget class.

Default setting: FALSE

Use Specifications for Maintenance Budget

Set to TRUE to use specifications to update figures for the Maintenance budget class.

Default setting: FALSE

Use Voucher to Update Forms Details

There are two ways to update the Purchase Budgets. If this parameter is set to FALSE, the Budget is updated from the Part Paid and Final Total fields on the Purchase Order. These values must be entered manually by users. If this parameter is set to TRUE, then it will be necessary to enter a Voucher to update the Budget.

It is very important to realize that when you Budget at the Line Item level, you must enter Vouchers; otherwise, AMOS would have no way of knowing how to separate the amounts you enter in the Part Paid and Final Total fields among the various Line Item Budget Codes.

Default setting: FALSE

Voucher; Use Work Flow

Set to TRUE to use your customised Work Flow to track the progress of each voucher from (for example) creation to approval to payment issued or received. This requires that a Work Flow configuration be in place.

Default setting: FALSE

Maintenance Parameters

Auto-File Completed CBM Work Order

If this value is set to TRUE, CBM work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Corrective Action Work Order

If this value is set to TRUE, automatically generated corrective action work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Periodic Work Order

If this value is set to TRUE, automatically generated periodic work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Requisition Work Order

If this value is set to TRUE, manually requisitioned work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Completed Round Work Order

If this value is set to TRUE, automatically generated work orders are filed automatically when the status is set to Completed. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled CBM Work Order

If this value is set to TRUE, CBM work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Corrective Action Work Order

If this value is set to TRUE, automatically generated corrective action work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Periodic Work Order

If this value is set to TRUE, automatically generated periodic work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Requisition Work Order

If this value is set to TRUE, manually requisitioned work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Auto-File Controlled Round Work Order

If this value is set to TRUE, automatically generated work orders are filed automatically when the status is set to Controlled. If the value is set to FALSE, it is necessary to manually file such work orders.

Default setting: TRUE

Allow Negative Value Of Counters

This parameter, when set to TRUE, will allow a user to enter a lower counter value than the one previously recorded. This facility can be used to correct values when counters are changed or if an error has been made during the reading or inputting of the previous amount. Note that this may affect certain counter based maintenance procedures. If the parameter is set to FALSE a user will be prevented from entering a lower amount and an error message will appear.

Default setting: TRUE

Auto Inherit Counters

If this parameter is set to TRUE, components installed in sub-functions will automatically inherit counter updates from the component installed in the respective parent function.

Note: For each sub-function component that is to inherit the counter updates, the user must go to the component's Counter tab and set the Depends On value to the correct parent function component.

When the Auto Inherit Counters parameter is set to TRUE and a component is removed from its sub-function, the Depends On value is removed automatically from that component's Counters tab.

Default setting: FALSE

AutoFilter WO By Discipline

When set to TRUE, the list of work orders is automatically restricted to the discipline that the user who is currently logged on belongs to.

Default setting: FALSE

Automatically Create Initial Work Order

When a job is defined (or re/activated) on a component with enough information to create the first work order, if this parameter is set to TRUE AMOS will create the first work order automatically according to the defined frequency and last done date. Set to FALSE, no first work order will be created and the user will need to do so manually.

This parameter is useful during the process of establishing an AMOS database. By setting it to FALSE, AMOS will not automatically generate work orders as you define components, counters and jobs. When this is complete, change the parameter to TRUE and then select Maintenance > Generate Work Orders to kick-start the creation of initial work orders according to schedule. After that, whenever the previous work order is reported complete, AMOS will create the next one automatically.

Default setting: TRUE/follows setting on 'Automatically Reschedule Work Orders'

Automatically Reschedule Work Orders

When set to TRUE AMOS will reschedule existing work orders automatically, if a user changes details like 'Last Done' on the job or updates a counter. Set to FALSE, existing work orders will not be rescheduled according to such changes.

Default setting: TRUE

Automatically Update Active Work Orders with Changes on Round Comp Jobs

Determines whether deactivated or re/activated round jobs should be removed from or added to existing, active round work orders. Set to NEVER, AMOS will not remove or add such jobs.

Set to ALWAYS, AMOS will automatically remove deactivated jobs; and, add re/activated jobs according to the setting of the 'Include All Jobs when Generating Work Order' checkbox on the round. If flagged,

AMOS will add the job(s) to the active round work order. If the box is not flagged, AMOS will only add the job(s) to the work order if the due date on the job itself is before or on the work order's due date. Jobs due later than the work order will be excluded.

Set to ASK, AMOS will prompt the user for confirmation before removing/adding jobs from/to existing round work orders.

Default setting: NEVER

Calculate Estimates for Component Jobs

This parameter may be set to Average or to Never. If set to Average, the program automatically updates the component job estimates. The values for Total Duration and Total Cost are estimated based on the duration and the cost of required parts and/or resources that have been reported

Default setting: NEVER

CBM File Name as Date

Set to TRUE to take the CBM file name as the 'Read Date'. AMOS will check that the CBM file name begins with an 8 digit sequence corresponding to a valid date in the YYYYMMDD format. If the validation fails, it will be entered in the CBM log and the readings will not be imported from the file. If the validation passes the reading will be added to the database with the Read Date taken from the file name. The logged date will follow the current timestamp.

Default setting: FALSE

Default Preference When Reporting Work

This parameter determines which default value is checked in the Report Work dialog box which appears when you select Maintenance > Report Work. The possible values are Component, Function and Work Order.

Default setting: COMPONENT

Extended Resource Registration

You might want to let users provide more detail about required disciplines for component/type jobs like the number of people needed for each listed discipline, the specific activity they'll carry out and an estimate of the hours needed per person. Set this parameter to TRUE to add these extra fields to the Required Disciplines tab wherever it appears in the system.

Default setting: FALSE

Extended Resource Registration, Activity

When the system parameter 'Extended Resource Registration' is set to TRUE, and a list of activities is defined in the Resource Activity register, users can apply specific activities to the disciplines listed for component/type jobs.

The system parameter 'Extended Resource Registration, Activity' is set by default to REGISTER, meaning users will be restricted to selecting an activity from the Resource Activity register. If you change the parameter setting to REGISTER AND TEXT, users can also add free text to the required disciplines.

Default setting: REGISTER

Extended Resource Registration, Auto Calc Est. Hrs.

When the system parameter 'Extended Resource Registration' is set to TRUE, users can define the number of resources needed for each required discipline listed on a component/type job, and specify the estimated hours per resource.

AMOS updates the total estimated hours for each required discipline according to the setting of the 'Extended Resource Registration, Auto Calc Est. Hrs.' parameter. Set to TRUE, AMOS will automatically calculate the total estimated hours with any change to the number of resources and estimated hours.

Set to FALSE AMOS still calculates the total estimated hours but will prompt for confirmation before overwriting any existing value.

Default setting: FALSE

Function, Only Show Active Jobs

This parameter when set to TRUE, causes only active jobs to appear in the Functions Hierarchy window Jobs tab. Any inactive jobs will be hidden.

Default setting: FALSE

Hierarchy, Show Numbers

Set to TRUE, the function/component numbers will show in the hierarchy windows folder structure by default. Set to FALSE the numbers will not appear in the hierarchy until the user selects Options > Toggle Numbers.

Default setting: FALSE

Job Description Revision Control

This parameter controls revisions of maintenance job descriptions. Setting it to TRUE enables multiple versions of maintenance-type job descriptions to be stored in the Job Description table. There can only be one current active and one draft version of any job description. The job descriptions available when creating new records in component job, component type and requisition work are always of the status Active.

Default setting: FALSE

Log Counters For Non-Counter Based Jobs

If this parameter is set to MANDATORY, reporting work against non-counter based jobs will require a mandatory counter value to be entered, providing that the component has a counter association. If set to OPTIONAL, job counters will remain mandatory while component counters will be optional.

Default setting: NEVER

Log Details of Not Done Jobs, on Round WO

When a user reports details like history and stock/resources used on jobs set to 'Completed' or 'Partly Done', AMOS creates entries in the maintenance log. Whether or not it's possible to save these details and create maintenance log entries for jobs set to 'Not Done' depends on the setting of this parameter.

If set to FALSE, any such details added to a 'Not Done' job will not be logged. If set to TRUE, a maintenance log entry will be created for any 'Not Done' job with details added to it.

Default setting: FALSE

Log Job Rescheduling

This parameter controls creation of entries in the Reschedule Log when the Due Date on a work order is changed. Can be set to NEVER, ALWAYS, or IGNORE LOGGING WHEN DUE DATE WAS EMPTY.

Default setting: ALWAYS

Log Work With Employee

This parameter determines whether work will be reported by discipline or by employee. Set to FALSE, work is reported by Discipline. Set to TRUE, reporting will be done on an individual employee basis.

Setting the parameter to TRUE in order to report work by employee also requires that at least one each of the User Defined Fields > Employee > 'bonus1' up to 'bonus4' and 'salary1' up to 'salary4' be switched on and then rates set for the activated fields in the **File > Open Register > Employees > Additional Info.** window. When reporting work, users can then select an employee in the Resources Used tab, and supply the hours spent per rate.

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

Default setting: FALSE

Maintenance Log Modification Warning

This parameter, when set to TRUE ensures that accidental modifications to the maintenance log cannot be made. If the user tries to alter information in the maintenance log a warning message alerting the user will appear. If set to FALSE the user can modify information without warning.

Default setting: FALSE

New Component Job Default Active

Set to TRUE, the Active checkbox on the Component Jobs window will be checked by default for new jobs. Set to FALSE, the box will be unchecked and the user must check it manually to activate the job. Deactivated jobs are not included when the first work orders for new jobs are generated.

When the parameter 'Automatically Reschedule Work Orders' is set to TRUE AMOS will respect the Active checkbox setting on the component job and only generate work orders for jobs where the checkbox is flagged.

Default setting: TRUE

Only Allow to Add Project WO for External Disciplines to Order Forms

Set to TRUE, a project job can only be sub-contracted if the Responsible Discipline assigned to it is an 'external' one. If the parameter setting is changed to FALSE, jobs with any discipline assigned can be selected.

Default setting: TRUE

Reason on Component Job Change

When set to TRUE, a dialog will appear on saving changes in the Component Jobs window. When users have changed a job's Required Disciplines, Periodic Frequency or Period, they will not be able to save the changes until they provide a reason in the dialog.

Default setting: FALSE

Report History by default

This parameter controls whether the Report History option when reporting planned maintenance work orders (rounds, periodic jobs) is switched on or off by default. It's possible to override the default setting on a component job or round itself.

Default setting: TRUE

Report Resources by default

This parameter controls whether the Report Resources Used option when reporting planned maintenance work orders (rounds, periodic jobs) is switched on or off by default. It's possible to override the default setting on a component job or round itself.

Default setting: TRUE

Report Stock Usage by default

This parameter controls whether the Report Stock Used option when reporting planned maintenance work orders (rounds, periodic jobs) is switched on or off by default. It's possible to override the default setting on a component job or round itself.

Default setting: TRUE

Report Work, Require Reason for Overdue Work

If this parameter is set to TRUE and the Date Done for reported work is later than the Due Date on the Work Order, the Overdue dialog opens and the user must enter a reason for the late work.

Default setting: FALSE

Report Work, Resource Used to Update Component Job Required Disciplines

AMOS can update the Required Disciplines tab on the Component Job window according to the data a user enters in the Report Work window Resources Used tab, when this parameter is set to either ASK or ALWAYS. On the parameter setting, flag the types of updates you want to make to the component job's required disciplines list, depending on the user's actions in the Report Work window Resources Used tab:

- Additional Disciplines. If the user adds another discipline to the Resources Used tab, AMOS will add the same discipline to the job's Required Disciplines tab. Only the discipline itself will be added - not the hours specified.
- Changed Hours. If the user changes the hours on a discipline listed on the Resources Used tab, AMOS will change the estimated hours for this discipline on the job's Required Disciplines tab.

When the parameter is set to ALWAYS, any changes the user makes while reporting the work will automatically be reflected on the Component Job window Required Disciplines tab, according to the option (s) flagged here. Set to ASK, AMOS will prompt the user in the Report Work window about newly added disciplines or changes to hours. The user can then flag or unflag disciplines or hours to update the Component Job window Required Disciplines tab with.

To activate this parameter, 'Use Component Types' must be set to FALSE.

Default setting: NEVER

Report Work, Show Component Parts

When this parameter is set to TRUE then the Stock Used tab of the Report Work window lists the required parts for a work order and any items reported in the Spare Part Log as well as any parts linked to the component on the work order.

Set to FALSE, the Report work window in the Stock Used tab lists only the required parts and any items in the Spare Part Log.

Default setting: FALSE

Report Work, Stock Used to Update Component Job Required Parts

AMOS can update the Required Parts tab on the Component Job window according to the data a user enters in the Report Work window Stock Used tab, when this parameter is set to either ASK or ALWAYS. On the parameter setting, flag the types of updates you want to make to the component job's required parts list, depending on the user's actions in the Report Work window Stock Used tab:

- Additional Parts. If the user adds another part and quantity to the Stock Used tab, AMOS will add the same part and quantity to the job's Required Parts tab.
- Changes to Quantity. If the user changes the used quantity for a part already listed on the Stock Used tab, AMOS will change the quantity for this part on the job's Required Parts tab.

When the parameter is set to ALWAYS, any changes the user makes while reporting the work will automatically be reflected on the component job required parts tab, according to the option(s) flagged here. Set to ASK, AMOS will prompt the user in the Report Work window about newly added parts or changes to quantity. The user can then flag or unflag parts to update the Component Job window Required Parts tab with.

This parameter also controls updates from the In/Out of Stock window in the same way. When a part is registered 'Used' in the In/Out of Stock window in conjunction with a completed work order for a component job, AMOS will add it to Required Parts tab if it wasn't already there, or update the quantity used on an existing part if it's changed, according to the parameter setting and flagged option(s). Likewise, if a user returns a part by registering a 'Returned Unused' transaction in the In/Out of Stock window in conjunction with a completed work order, AMOS will adjust that item's quantity on the component job's Required Parts tab.

To activate this parameter, 'Use Component Types' must be set to FALSE.

Default setting: NEVER

Report Work, Stock Used to Update Component Spare

This parameter and related functionality is disabled when 'Use Component Types' is set to TRUE.

When 'Use Component Types' is set to FALSE and this parameter is set to ALWAYS or ASK, AMOS can update the Parts tab on the Components window with any spare(s) added to the Report Work window Stock Used tab when reporting a job. No quantities are added with the spare(s), just the name and number.

Set to ALWAYS, AMOS will automatically add any new spare reported on the Stock Used tab to the Components window Parts tab for the relevant component. Set to ASK, AMOS will present a list of newly added parts the user has reported, and let the user flag any which should be added to the Components window Parts tab.

When set to NEVER, no changes will be made to the Component window Parts tab according to spare usage, and 'Component Types' may be used.

Default setting: NEVER

Require Reason For Job Rescheduling

This parameter, when set to TRUE, forces the user to input a reason for job rescheduling. If set to FALSE there is no requirement to enter a reason. Note that this parameter is ineffective if the parameter Log Job Rescheduling is set to FALSE.

Default setting: FALSE

Requisition work, Open Work Order Window

Set to TRUE, selecting to create a requisition work order from the main Maintenance menu or any relevant Options menu will bypass the Requisition Work dialog window and open the Work Orders window instead, with a new work order entry of type 'Requisition' already created in it.

Default setting: FALSE

Requisition work, Report History by Default

This parameter controls whether the Report History option when reporting requisition work orders is switched on or off by default. It's possible to override the default setting on a requisition work order itself or from the Requisition Work dialog window.

Default setting: taken from value of 'Report History by default'

Requisition work, Report Resource by Default

This parameter controls whether the Report Resources Used option when reporting requisition work

orders is switched on or off by default. It's possible to override the default setting on a requisition work order itself or from the Requisition Work dialog window.

Default setting: taken from value of 'Report Resources by default'

Requisition work, Report Stock Usage by Default

This parameter controls whether the Report Stock Used option when reporting requisition work orders is switched on or off by default. It's possible to override the default setting on a requisition work order itself or from the Requisition Work dialog window.

Default setting: taken from value of 'Report Stock Usage by default'

Restrict Replanning Of Started Work Orders

If set to TRUE, it is not possible to re-plan (to move) a work order in the work planning timeline once the Started date has been set. This occurs the first time a user reports maintenance work against the work order.

Default setting: FALSE

Seconds Between each CBM Check

This parameter allows you to control the frequency at which the system checks for CBM activity.

Default setting: 180

Stock reservation trigger

This parameter determines when a Stock Item will show as Reserved on a Work Order. In order for this parameter to have any effect, the Stock Item must be in the Required Parts list on a Work Order and have an amount in the Reserved column.

In that case, if the value is set to Work Order Status, as long as the Work Order has the status Planned or Issued, then the Stock Item will show as Reserved.

If the value is set to Work Order Status and Window, not only does the Work Order status matter, but also the value of the Window: that is, the number of days prior to the actual Due Date that the system will consider the Work Order as due.

Default setting: Work Order Status and Window

Use Job Dependencies

If this parameter is set to TRUE, you can configure links between two or more component jobs inside the Jobs window (accessed from the Components window). These links can also be configured in the Job Planning window graphical timeline.

Default setting: FALSE

Use Maintenance Task

If Maintenance Tasks is part of your licence and this parameter is set to TRUE, Maintenance tasks will be used in planning. The user can view outstanding stock quantities on forms for Maintenance Tasks in the Stock Wanted window in a field called Outstanding Tasks.

Default setting: FALSE

View Counter From Functions Perspective

Counter updates can be done based on the Function or Component number. In a centralised database, it would be most common to track runtime by Functions, therefore this parameter would be set to TRUE. The Update Counters facilitywould then be filtered and viewed from a functions perspective rather than a component perspective.

Default setting: FALSE

Work Order Tracking Accuracy

This parameter controls the level to which Work Orders are tracked. The two possible parameters are Date Only and Date/Time. Date Only lets you plan work by date whereas Date/Time lets you plan to the nearest 15 minutes.

Default setting: DATEONLY

Payroll Parameters

Payroll Calculation Period

Set this parameter to calculate the number of days for each month. Setting EXACT DAYS causes every month to be calculated exactly: i.e. January 31 days, February 28 (or 29) days etc. Selecting FIXED 30 DAYS causes all months to be calculated with 30 days regardless of the actual number of days.

Default setting: EXACT DAYS

Payroll Current Period

Use this parameter to set the starting year/month for payroll calculations.

Summarise Payroll Transactions

When a crew member has two contracts on the same vessel, for example by fulfilling two different ranks, AMOS will add up the amounts owed for the payroll and show the overall total on the payslip. To allow for the option of keeping separate totals, set this parameter to FALSE.

AMOS will consider the parameter setting and show amounts in the payslip accordingly.

Default setting: TRUE

Variable Transactions - Default Wage Type

Use this parameter to define a default wage type to be added automatically when you insert new variable transactions into the Variable Transactions tab in the Employee Overview window.

Variable Transactions - Identification Filter

Wage Types can have an Identification value assigned in the Wage Type register: Undefined, Variable, Fixed or Calculation. Set this parameter to TRUE to restrict the list of wage types presented for selection when defining variable transactions, according to the identification values. When a user clicks the Wage Type lookup in the Variable Transactions window AMOS will first present a dialog where the user can select which Identification(s) to filter by. Then, only Wage Types with the matching Identification will be presented for selection.

Set to FALSE, all wage types will be presented in the filter regardless of any identification values.

Default setting: FALSE

Variable Transactions - Payroll Currency Code

Set the default currency code for variable transactions using this parameter. The standard currency is defined in the company and vessel registers.

Variable Transactions - Show <>

When any of the parameters in this group is set to TRUE, the relevant field and content will be displayed in the Employee Overview Variable Transactions tab.

Personnel Parameters

Employee Planning - View Months From Now

Use this parameter to set the number of months from now that should be visible in the Employee Planning window.

Address Format

Different countries have different standard layouts for addresses. This parameter defines the format to be used when registering and displaying the employees' addresses. Move the characters to change the order of the fields.

Default setting: 123TZSC

Where:

1, 2, 3 = street address

T = Town/city

Z = Zip or post code

S = State

C = Country

Employee Number Sequence Max

This parameter defines the maximum number that can be used in the Employee Number. This can be used to reduce errors. Clearing the values from both this parameter, and the Employee Number Sequence Min parameter, enables the user to avoid auto-numbering in the Crewing > Employee window.

Default setting: 2000

Employee Number Sequence Min

This parameter defines the smallest number that can be used in the Employee Number. This can be used to reduce errors. Clearing the values from both this parameter, and the Employee Number Sequence Min parameter, enables the user to avoid auto-numbering in the Crewing > Employee window.

Default setting: 1 (number begins at 0001).

Leave Days - 30 Days Deduction

When this parameter is set to TRUE, leave days are calculated with 30 days every month. Set to FALSE, leave days are calculated according to exact days per month.

Default setting: TRUE

Store Documents in the Database

You can attach picture files, document files etc. of certificates, passports, visas and other documents to the employees' records. This parameter tells the system whether or not the files are to be stored in the database. If they are not to be stored in the database, set this parameter to FALSE and then go to the Directories > Crew Member Document Directory parameter and define where you want the files to be stored.

Default setting: TRUE

Purchase Parameters

Output - Mail Attachment Type

When printing a purchase order form to email, AMOS converts the purchase order to an attachment in order to send it with the email. The setting of this parameter tells AMOS what type of file type to use for this attachment.

Note that if the setting is left as NONE, sending email from the Purchase module is prevented.

Default setting: NONE

Auto Set Delivery 'Portal Queue'

When using e-Business Direct, you can set this parameter to automatically flag the Portal Queue check-box on NEW, UPDATED or ALL deliveries. By default, the checkbox will Never be marked. If the box is checked, the delivery form is then automatically set to be sent with the next portal export.

Default setting: NEVER

Auto-Calculate Form Estimate

This parameter is used to determine if the form estimates are automatically calculated and updated if the amount is changed. If the parameter has been set to FALSE, it is possible to perform the calculation manually by selecting Estimate cost from the Options menu.

Default setting: FALSE

Auto-Calculate Weight on Transfer and Transport Docs

Set this parameter to ALWAYS if you want AMOS to automatically calculate the weight of items on records when a user opens the Transfer Document, Transport Document and Deliveries window. Set to ASK, the system will prompt the user before making the calculation. Set to NEVER, AMOS will not make an automatic calculation.

Default setting: NEVER

Auto-File Fully Received Form

If this parameter is set to TRUE, forms that have been fully received will be filed without prompting.

Note: The value of this parameter is ignored when Work Flow on Purchase is in use.

Default setting: FALSE

Auto-Fill Delivery Details

When this parameter is TRUE, the following values get copied from the Order Form to its Deliveries:

- Latest Delivery Date – Advised Ready
- Vendor – Forwarder
- Delivery Address – Destination

Default setting: FALSE

Auto-Set `Budget Date'

This parameter determines if and when the Budget Date field on purchase order forms should be updated.

- Set to NONE, the Budget Date won't be updated.
- Set to ISSUE, the Budget Date field is set to the current date (Today) when a user prints an original purchase order. If the budget code is not valid on that date, the form will not be printed. For example, if you create an order form in 2015 and attach a 2015 budget code to it, but don't print the form until 2016, the 2015 budget code will not be valid.
- Set to APPROVAL, the Budget Date field will be updated to the date the form is approved.
- Set to BOTH, approving and issuing the form will update the field.

Default setting: NONE

Auto-Update Multi-Vendor Details from Line Item

Set to TRUE, the data set for Purchase Unit, Factor, Currency, Price, %Discount, and Delivery Time on the Quotation Line Items will update the Stock Item's Vendors tab for that vendor. Additionally, the Vendor Ref. and Description fields[1] on the Quotation Line Items will be editable (according to user access in that window) and changes to them will update the Stock Item's Vendors tab.

If the user decides not to enter information at the Quotation Line Item level, then the Order Line details will carry over to the Vendor tab so long as that Vendor is the Form's Vendor.

Set to 'Only When Issuing Purchase Order', the details listed above will be set only when an original purchase order is being sent/printed.

Set to FALSE, no updates will be made to the Vendors tab. Also, editing the Vendor Ref and Description fields will be prevented.

Default setting: TRUE

Auto-Update Stock Details from Line Items

This parameter allows the system to update Stock Details with details entered in a Line Item. Set this parameter to FALSE to prevent stock items updating automatically.

Default setting: TRUE

[1] The Vendor Ref. and Description fields on Quotation Line Items are only available for stock lines, not service lines or quotation-specific alternative lines.

Best Purchase Price Evaluation Period

To help you establish the best possible purchase price on stock items and limit the records presented in the Purchase History window, you can apply a default time period (days, weeks, months) to individual stock classes: for example the time frame you want to review would be longer on spare parts than on consumables like fuel oil. AMOS will then show you the historical purchasing information and flag the best price for relevant stock inside of the set time frame only.

If you are not using stock classes, or you have stock without a class defined on it, you can set the same time period using this system parameter. In this case, the set period applies to:

- any stock which is without a stock class, and
- any stock which does have a stock class defined, but there is no best purchase period set on that class.

Default setting: M3

Clean Up 'For Component' In Stock Wanted

This parameter, when set to TRUE, will clear any entries made in the For Component column of the Stock Wanted window once the desired forms have been generated. If the parameter is set to FALSE the component number in the For Component column will be set as the default value for that stock item and will be automatically entered in the column each time the Stock Wanted window is opened. To select a default component click the lookup button. The parameter Component Search Range in Stock/Wanted determines whether you are presented with a list of components associated with the selected stock item or a list of all existing components when clicking the lookup button. This parameter is found in the Parameters > Options > Stock section.

Note: If a stock item has only one component associated with it, the component number will be automatically inserted into the For Component column regardless of the value of this parameter.

Default setting: TRUE

Close Quotation After Query Select

This parameter, when set to TRUE, will automatically save all changes and close the quotations window after you select a vendor. If the parameter is set to FALSE the user will have to save changes and then exit the window in the normal way.

Default setting: FALSE

Commodity Purchase

Normally, Form Generation breaks orders apart based on the Preferred Vendor. If this parameter is set to TRUE, Purchase Forms (of all types) can be grouped according to Stock Class and an Order Form can only contain Line Items that belong to the same Stock Class. Even if the Preferred Vendors are the same, Stock Items of different Stock Classes will not be grouped together.

Default setting: Empty

Component Search Range in Order Lines

When adding a line item to a form in the Purchasing module, the stock number for the item to be purchased must be entered and then the specific component to purchase it for defined.

By default this parameter is set to Any which has the effect that if you press the lookup button next to the line item Component field, a complete list of components is presented.

However, AMOS allows you to attach a list of stock items to a component if you wish, tying for example spare parts to a piece of equipment. By setting this parameter to Restrict, only those components to which the selected stock item is attached are listed.

Default setting: ANY

Copy Stock Item Details to Line Item

When set to TRUE, upon either manually or automatically adding a stock item as a line item to an order form, the details registered on the stock item itself will be copied to the line item details on the form. Later, if the stock item's code is removed from the line item AMOS will check if the details on the line item are the same as the details on the stock item and if so, clear the details as well. However, if the details have been altered on the line item, AMOS will ask the user to confirm the deletion of the line item details first. If this parameter is set to FALSE, the details will not be copied or removed.

Default setting: FALSE

Create New Form On Form Conversion

If this parameter is set to TRUE, performing a conversion will create a new form containing the order information and the existing one will take the status Filed.

Also note that when set to TRUE and a user splits a line item to a sub-form, on the Form Splitting dialog the Form Type to split to will be set to the same type as the originating form type. Selecting another type will not be possible.

Default setting: FALSE

Form 'Generic Queue' field

This parameter facilitates the interface between AMOS and other systems used to handle purchasing and/or accounting data. When the option When Printed is checked, the Forms Queued For Transfer indicator is set when an original purchase order is printed. When the option When Approved is checked, a form is queued for transfer when it is approved. When the option When Received is checked, a form is queued for transfer when it is received.

Default setting: 0 (no value checked).

Form Status After Query Select

This parameter determines what the Form Status will be after selecting a Vendor in the Order Form’s Quotation window.

Default setting: UNCHANGED

Form Type After Query Select

This parameter determines what the Form Type will be after selecting a Vendor in the Order Form’s Quotation window.

Default setting: UNCHANGED

Inherit Delivery Priority from Purchase Form

Set to TRUE, the priority on a purchase form will be inherited on any deliveries created for that form.

Default setting: FALSE

Interrupt Automatic Form Creation

There are three options for setting this parameter. Set to IF MISSING INITIAL VALUE, the system will check for initial values and present the Mandatory Fields window only if values are actually missing. The user must then enter the values and click OK to continue. Set to ALWAYS, the system will interrupt Automatic Creation of forms and present the Mandatory Fields window (whether values are missing or not) for the user to enter values if necessary, and click OK to continue with form generation. Set to NEVER, the system will carry on with automatic form generation regardless of whether any initial values are missing from mandatory fields or not, creating the forms with database default values.

This setting also determines whether or not the List Newly Created Forms checkbox on the Form Creation dialog is checked by default and whether or not the user can uncheck it. If the value is NEVER then it is unchecked by default but can be checked; if set to IF MISSING INITIAL VALUE or ALWAYS then it is checked by default and cannot be unchecked.

Default setting: NEVER

Level of Approval

AMOS supports three methods of form approval:

- NONE
- SIGNING
- ACTUAL APPROVAL

With NONE selected, approval is not required before an original purchase order can be printed. With SIGNING selected, someone with password authority to approve forms can approve the form using any legal user name. With ACTUAL APPROVAL selected, someone with password authority to approve forms can approve the form using only their own user name.

Default setting: ACTUAL APPROVAL

Line Items Displayed by Default

The setting of this parameter determines which line items - active, cancelled and split - are shown by default on purchase forms, and how the window 'Show All' option works.

- When set to ACTIVE, only active line items appear by default. Selecting Options > Show All displays active, cancelled and split items. Toggling the option returns the list to active items only.
- When set to ACTIVE AND SPLIT, active and split line items appear by default. Selecting Options > Show All displays active, cancelled and split items. Toggling the options returns the list to active and split items only.
- When set to ALL, active, split and cancelled line items appear by default. Selecting Options > Show All displays only active items. Toggling the option returns the list to all items.

Default setting: ACTIVE

Link Stock Class To Order Form Content

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

Then, when a content description with stock classes linked to it is entered on a form, only the items belonging to the linked stock classes can be added as line items to that form. Furthermore, when forms are generated automatically the required items will be separated by content: that is, all items in all stock classes assigned to the content entry 'Goods' will be grouped onto one form, etc.

When set to FALSE, stock classes cannot be linked to content descriptions and the descriptions can simply be selected on the Forms window without restrictions.

Default setting: FALSE

Lock Approved Purchase Orders

If this parameter is set to TRUE, any Purchase Orders that have been approved are locked for all editing. This includes all the line items for the form.

A locked Purchase Order cannot be edited unless the user is a member of a group that has access in the Access Control window > Functions tab to Edit Approved Purchase Orders. Once a form is locked, the

user cannot convert the locked Form to a Form of another type. The user must also have edit access to Forms and to the particular status of Purchase Order.

Default setting: FALSE

Lock Approved Requisition Forms

If this parameter is set to TRUE, any Requistion Forms that have been approved are locked for all editing. This includes all the line items for the form.

A locked Requisition Form cannot be edited unless the user is a member of a group that has access in the Access Control window > Functions tab to Edit Approved Requisiton Forms. Once a form is locked, the user cannot convert the locked Form to a Form of another type. The user must also have edit access to Forms and to the particular status of Requisition Form.

Default setting: FALSE

Lock Exported Requisition Forms

If this parameter is set to TRUE, any Requisiton Forms that have been exported are locked for all editing. This includes all the line items for the form.

A locked Requisition Form cannot be edited unless the user is a member of a group that has access in the Access Control window > Functions tab to Edit Exported Requisition Forms. Once a form is locked, the user cannot convert the locked Form to a Form of another type. The user must also have edit access to Forms and to the particular status of Requisition Form.

This parameter is useful in preventing changes to Forms after they have left the remote site/vessel. However, office groups must have access rights to edit the Forms in order to work on them.

Default setting: FALSE

Lock Line Items According to Stock Access

If set to TRUE, this parameter locks an Order Form's Line Items based on the Stock Class Access set up to prevent unauthorized access to Stock Items. The fields locked are the Part Name, Maker's Ref., Extra Info., and Unit fields.

Default setting: FALSE

Lock 'Ordered' Form Fields

Certain fields on a Purchase Order can be locked and rendered inaccessible for editing, after the Form has been ordered. These fields are Budget Date, Budget Code, Ordered, Estimate, and Currency. The option to Estimate Cost is also unavailable. These fields cannot be edited unless a user is a member of a group that has access in the Access Control window > Functions tab to Edit Ordered Form Fields.

Default setting: FALSE

Note: Even if Restrict is selected, you can still enter the number of any component by hand if you wish.

Multiple Departments In Order Forms

This parameter, when set to TRUE, allows Order Forms originating from other departments to be viewed and modified in the current department. Select the desired department from the Department drop-down list in the Purchase > Forms filter window. This does not allow for the creation of new Order Forms, and the number of departments available depends on the users' global access rights. To use the Split, Copy, Convert and Receive Order Forms functions and to Add or Update Line Items against an Order Form in the Slopchest module, set this parameter to FALSE.

Default setting: FALSE

Ordering from Stock Wanted, Contract is Mandatory

Set to TRUE, when a user creates a purchase form from Stock Wanted for parts tied to a contract, he is required to select the relevant contract to apply to the form and choose a delivery location.

Set to FALSE, AMOS will not automatically require the selection and use of a relevant contract when ordering contracted parts from Stock Wanted. In this case the office can decide to apply the contract later on.

Default setting: TRUE

Ordering from Stock Wanted, Delivery Location is Mandatory

When set to TRUE, users can select a default delivery location for all items placed onto order forms generated from Stock Wanted, regardless of whether each item is tied to a contract or not. If no valid contract is available, AMOS will disable the Delivery Location field and add a tooltip to inform the user that no contract is available.

Default setting: FALSE

Origin on Line Item Level

Setting an origin on a purchase form indicates the departmental division which the selected form was created from: for example, 'Deck' or 'Engine' inside the Maintenance department. This parameter controls whether the Origin field is displayed on the Line Items window too.

Set to NEVER, the field is hidden on the Line Items window. Set to ALWAYS, the field appears and individual line items inherit the origin value from the form header. Set to ASK, if the user changes a form header's origin AMOS will ask whether the value should be changed on the form's line items, too.

Default setting: NEVER

Prevent Quotation Synchronisation

The setting of this parameter determines whether or not any changes in order form line item windows are synchronised into the quotation lines. Set to NEVER, synchronisation is never allowed. Set to WHEN SENT, synchronisation will be prevented if one or more quotations are marked as sent. Set to WHEN RECEIVED, synchronisation will be prevented if one or more quotations are marked as received.

Default setting: WHEN SENT

Quotation Compare, Auto Add History

As users make changes to a quotation comparison scenario in the matrix, AMOS can keep read-only records of the previous configurations in the History tab. History can be created manually, or automatically. The changes which trigger automatic history creation are controlled by this parameter.

- NEVER. History is never created.
- CANCEL ORDER LINE ITEM. When a user cancels an item from the current comparison scenario, before actually removing the item AMOS stores the current scenario matrix in the History tab.
- SPLIT ITEM. When a user splits an item away to purchase it on another form, before actually removing the item AMOS stores the current scenario matrix in the History tab.
- BOTH CANCEL AND SPLIT. AMOS stores the current scenario in the History tab before cancelling or splitting away any item.

Default setting: NEVER

Require Estimated Cost for Approval

This parameter, if set to TRUE will prevent a user from granting approval for a purchase form if the Estimate field in the Cost Overview section of the window is zero.

Default setting: FALSE

Reset Purchase Counter On Financial Year

This parameter, if set to TRUE, will reset the number series for Form, Purchase Order, Query and Requisition Form on the first day of a new financial year. This is determined by the parameter Start Date for Financial Year. If the parameter is set to FALSE, the reset will occur on the first of January each year.

Default setting: FALSE

Restrict Original PO Printing

If set to TRUE, this parameter restricts the printing of original purchase orders without a valid budget code or an estimate.

Default setting: FALSE

Set Date Automatically During Receipt

This parameter controls whether the Receipt Date field of a purchase order is filled in automatically during receipt. When set to FALSE, the user must enter the receipt date manually.

Default setting: TRUE

Use Latest Delivery Date of Order Lines

This parameter, when set to TRUE, activates the Latest Delivery Date field for the purchase form header and line items.

Default setting: FALSE

Use Quotation 'Discount Given'

There are two places to enter discounts on Quotations: one is in the field % Discount Given at the Quotation header level; the other is the field % Discount at the Quotation Line Item level. The value at the Quotation Line Item level will always apply to the Line Items. The value at the Quotation header level will only apply to the Line Items if this parameter is set to FALSE.

When this parameter is set to FALSE, if the user changes the Quotation header level discount, a dialog appears with three options to update the Line Item discounts (No change, Replace with new, Add new to existing).

Default setting: FALSE

Use Vendors' Price

When adding items to an order form, the system automatically fills in the line item details from information contained in the Stock Item window.

Set to TRUE, the default values for Price, Unit and Factor in the Purchase Until section of the Order Line will come from the information in the Vendor tab on the Stock Item window. If there is no vendor information available, the values are taken from the Stock Item's Prices section.

If this parameter is set to FALSE, the system instead uses the Last Purchased Price and Currency in the Prices section of the Stock Item window.

Default setting: TRUE

Validate Order Form Dates

If this parameter is set to true, all dates entered on purchase forms will be checked to make sure they follow a logical date sequence, as below:

- CreatedDate Date 'Created:' is registered
- ApprovedDate Date 'Approved:' is after CreatedDate and before OrderedDate

- OrderedDate Date 'Ordered:' is after CreatedDate and before ReceivedDate
- ConfirmationDate Date 'Confirmed:' is after OrderedDate
- ReceivedDate Date 'Received:' is after OrderedDate
- LatestDeliveryDate Date 'Latest Delivery Date:' is after CreatedDate

Default setting: FALSE

Self Assessment Parameters

Not Applicable Score

To enable a N/A score, the N/A needs to be converted to a percentage so that it is possible to calculate the overall KPI score. This parameter determines whether N/A equals 0% or 100%: set to N/A=0% gives N/A a score of 0, and set to N/A=100% gives N/A a score of 100. Once set, the N/A Option checkbox has to be checked in the Self Assessment Configuration window, for any applicable KPIs.

Default setting: N/A=0%

Sub Element Start Code

Use this parameter to set the starting code for sub-elements: should the first sub-element within an element have no code (followed by the next with code A, B, etc.) or should the first sub-element have code A (followed by B, C, etc.). These are indicated by setting <SPACE> for no code, or A.

Default setting: <SPACE>

Yes No Score

To enable Yes/No scoring, the yes and no need to be converted to a percentage so that it is possible to calculate the overall KPI score. This parameter determines whether Yes equals 0% or 100%: set to YES=0% AND NO=100% gives Yes a score of 0, and set to YES=100% AND NO=0% to gives Yes a score of 100. Once set, the Yes/No Answer checkbox has to be checked in the Self Assessment Configuration window, for any applicable KPIs.

Default setting: YES=0% AND NO=100%

Stock Parameters

Allow Register Duplicate Component Spare Records

Set to TRUE, users can register the same stock type as a part on a component type record, multiple times. Set to FALSE, duplicate registrations will be prevented.

Default setting: TRUE

Allow Removal of more Items than in Stock

This parameter controls whether a user is allowed to use or remove a greater quantity of an item than is actually registered as being available in stock. This is relevant in some installations where a strict reporting of stock movement is not practised, or when stock items may be removed directly from transit storage or received shipments before they have been registered as received in stock.

Default setting: TRUE

Approval Required For Stock Transfer

This parameter determines whether approval is required for transfer of stock items between installations. If the parameter is set to TRUE, a receiving installation will not be able to see a transfer document until the status has been set to Approved at the donating installation.

Default setting: TRUE

Component Search Range in Stock > Wanted

When modifying a quantity in the Stock > Wanted window, the component number that the stock item is required for may be entered. If there is only one component associated with the stock item then that number is automatically inserted in the For Component column. If, however, there are several components associated with the stock item, click the lookup button to choose the component number you require.

If this parameter is set to ANY, clicking the lookup button causes a complete list of all components to be shown. If this parameter is set to Restrict, only the components associated with the stock item will be shown.

Default setting: ANY

> **Note:** Even if Restrict is selected, you can still enter the number of any component by hand.

Consumption Comment

This parameter activates a 'Comment' field on the In/Out of Stock window where the user can enter free-text remarks about transactions registered there. Set to NONE, the functionality is not in use.

Set to EACH LINE, the field appears at the bottom of every entry added to the In/Out of Stock window. Set to COMMON, the field does not show up on the window itself, but when the user is finished adding entries and clicks OK, a Change Reason dialog appears and he can add one comment there to apply for all new entries.

All comments will appear with the in/out of stock registrations on the Stock Transactions window.

Default setting: NONE

In/Out of Stock on WO of Status

Stock usage can still occur after a work order has been reported and finished. This parameter controls whether or not users can report stock movement in the In/Out of Stock window against work orders with status Completed and Filed, as well as against Active work orders.

If this parameter is set to allow recording stock movement against completed or filed work orders in the In/Out of Stock window and a user selects a work order with one of these statuses, AMOS will warn the user that the transaction will be reported against a job which is already finished and allow the user to continue.

Allowing stock usage to be recorded against finished work orders ensures that all stock reported used against a work order is taken into consideration in the statistical information for that work order.

Default setting: ACTIVE

Inherit Full Description From Parent

If this parameter is set to TRUE, child stock types that do not have a full description of their own automatically inherit that of the parent stock type. If the description for the child stock type is subsequently altered it is saved as the new description for the child stock type only.

Default setting: FALSE

List All Transfer Documents

If this parameter is set to TRUE, the installation lists all the transfer documents that have been submitted from all installations. This may be quite useful at the main location if the parameter Approval Required for Stock Transfer has been set to TRUE. At the main installation, it will then be possible to list all the transfer documents in order to evaluate which should be approved.

Default setting: FALSE

Propose Work Order Required Parts

Allows the system to suggest values when performing an In/Out of Stock transaction for a work order.

Default setting: FALSE

Record Stock Usage When Reporting Work

This parameter restricts the ability to report stock usage against a work order, in order to stop double reporting of stock usage, both in reporting Work Orders and In/Out of Stock functions.

Default setting: TRUE

Stock Control: Populate 'Actual' Column

This parameter determines the value which appears in the Actual column in the Stock Control window, for each listed stock item. There are three possible settings:

- IN STOCK. The Actual column will be populated automatically to match the In Stock column.
- NONE. The Actual column will contain no values at all.
- 0. The Actual column will contain a 0.

Default setting: IN STOCK

Stock Price Logged

This parameter indicates whether you want the average or last purchased stock price to be used when calculating stock values.

Default setting: AVERAGE

Stock Reservation, Required Booking

If set to TRUE, your system will require advance booking of parts, and users will see a field called Booking Window, and a checkbox labelled Dynamic Booking in Component/Component Type Jobs > Required Parts.

Default setting: FALSE

Update Stock Status, With Status Change on CompSpare

Stock Types can be listed as parts for Component Types, and the status on a part can be changed in the Component Type window Parts tab to define the state of the selected part in reference to the equipment it belongs to. If this parameter is set to TRUE, when the status of stock is changed on CompSpare level and no other active instances of that stock type are registered against any other equipment, the stock type itself will be updated with the status defined on the part at CompSpare level. If this parameter is set to ASK, AMOS will present the message 'This is the only active reference of this stock to Components remaining, do you want to update the Stock Type?' and the user can choose Yes or No. Set to FALSE, the status is not changed on the Stock Type.

Default setting: FALSE

Use Stock Class Access

This parameter, when set to TRUE, allows you to restrict the various stock classes that can be accessed by each group of users. The access control is found at Tools > Configuration > Groups > Options > Stock Class Access. Note that to restrict a group's Stock Class Access, you must define the stock classes available to every group otherwise a group without defined stock classes will only be able to access stock items with unspecified stock class.

Default setting: FALSE

Use Stock Item Depreciation

This parameter must be set before any stock items are entered into the system, and tells the system whether to use stock item depreciation. Depreciation levels are set at Tools > Configuration > Depreciation Levels.

Default setting: FALSE

Voyage Parameters

IMOS Installed

Set this parameter to TRUE if you have IMOS installed on your system. Set to TRUE, this parameter prevents the creation of any voyages/cargoes in AMOS.

Default setting: FALSE

Import Cargo Group

If you receive a cargo specification from IMOS referencing a cargo type not already defined in AMOS, the cargo type is automatically created. To create the cargo type AMOS needs a cargo group. The Import Cargo Group parameter defines the cargo group for cargo types created during import from IMOS.

Default setting: There is no default setting. This parameter must be set manually by the installation engineer.

Lock Completed Voyages

When this parameter is set to TRUE, you cannot make changes to the details of any completed voyage.

Default setting: TRUE

Lock Discharged Cargoes

When this parameter is set to TRUE, you cannot add any new operations or events to completed cargo discharge procedures.

Default setting: TRUE

Lock Planned Port Calls

When this parameter is set to TRUE, you cannot make changes to the details of any planned port calls.

Default setting: TRUE

Lock Planned Voyages

When this parameter is set to TRUE, you cannot make changes to the details of any planned voyage.

Default setting: TRUE

Lock Sailed Port Calls

When this parameter is set to TRUE, you cannot make changes to the details of any sailed port calls.

Default setting: TRUE

Unassigned Cargo Department

When a cargo is initially created it may not immediately be assigned to a particular department. This parameter defines the default department responsible for newly created, unassigned cargo unless/until it is assigned to a specific voyage.

Default setting: There is no default setting. This parameter must be set manually by the installation engineer.

Sharing

Although some information may appear to be available from only within a single installation or department, all information is actually stored in the same set of database tables regardless of which installation or department they belong to. For the system to be able to show information belonging to a particular department, it has been necessary to stamp all table entries with a marker indicating which department they belong to. This mechanism works well for departmental types of information such as components, stock items etc., but does not suit for information to access at a more global level e.g. addresses disciplines, job classes and the like.

This set of parameters, one for each table in the database, control how the information contained/owned by one department is shared out such that it can be accessed by other departments.

There are also three special parameters controlling how the data contained in a table are shared between departments.

For example, an address register has been established in Inst/Dept 001/01, all addresses will have been stamped as owned by that department. Unless sharing is defined, these addresses will only be accessible from Inst/Dept 001/01. To share these addresses such that all departments have access to them, select to modify the Global Sharing parameters. Then choose the Sharing tab and on the parameter entry reading Addresses, specify Inst/Dept 001/01 from the list of defined departments. The addresses will now be accessible from every department.

The same feature can also be used to share information across all departments of a particular installation by defining sharing at the Installation level, or even at the Department level thereby sharing a single set of data between two departments.

As described at the beginning of this section, parameter values are inherited downwards from the global to the department level. For example, if a user logs onto to Inst/Dept 002/03, the system first checks to see whether sharing has been defined for department 002/03. If nothing is defined, the system then checks to see whether sharing has been defined for installation 002. If nothing is defined, the system then checks to see whether sharing has been defined at the global level. If no sharing definitions are found, the system then defaults to fetching information stamped as owned by department 002/03 (e.g. the current installation and department).

If you intend to use the component transfer facility within AMOS, you will need to ensure that global sharing is allowed for the following tables:

- Address Component Class
- Component Type Counter Type
- Discipline Employee
- Image Reference Image Reference/Hotspots
- Image Reference Links Image Source
- Job Class Job Description
- Maintenance Cause Maintenance Class
- Maintenance Criteria Maintenance Type

Note: When defining data sharing, data access rights and data synchronisation, it is very important that you consider the data ownership (office or vessel) and consequences of the import and export rules you apply, not only at table level but even at field level. For example, sharing on a component/job record is normally defined at installation level, but very often the owner of the information is not defined. In these cases, the office (technical department) might insert new records and update the frequency while the vessel updates the last done date and the next due date. With both vessel and office making changes, the import and export rules must be properly defined and modified from the standard ones.

User Defined Fields

Many windows in the system have a number of fields with no predefined function or title, and can be used as required in order to meet company or department specific needs. These are called User Defined Fields, and may be found on most windows throughout the system.

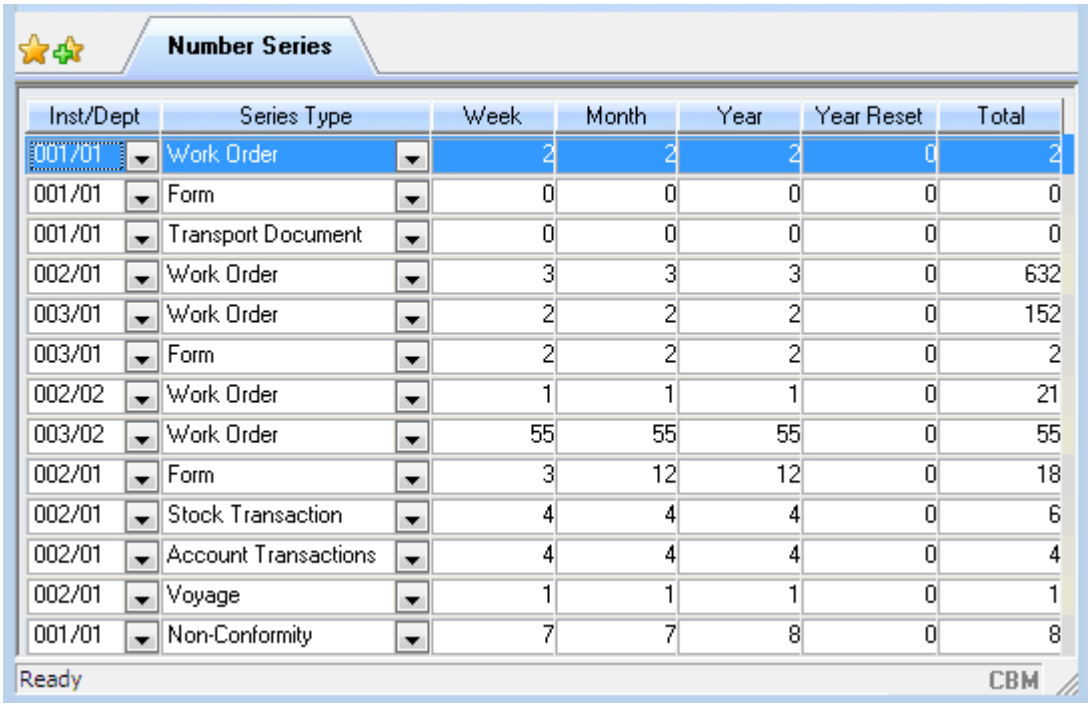
This set of parameters allows the user to define the screen leader texts of the user-defined fields when shown on screen. Unless they are in use, leave these fields empty. Once a label is entered for a UDF, the field will appear on the screen in the relevant window.

Number Series

Several items registered in AMOS are automatically numbered by the system; for example new work orders and components are assigned numbers by the system. Go to **Tools > Configuration > Number Series** to open the Number Series window, and initialise the various number series.

In the Auto-Numbering folder in the Parameters window you can define input masks to determine which characters to use when registering data of the different types and rules to determine how numbers are generated by AMOS.

See "Auto-Numbering" on page 109 about the Auto Numbering folders in the Parameters window.



- The **Installation/Department** column corresponds to the rules you create. The Number Series Sharing determines the **Inst./Dept.** values.

  EXAMPLE

  If you share the Address Number Series globally out of Installation/Department 001/01, then only one entry for 001/01 is required here. If you share the Form Number Series at the Installation level, then each Installation must have a Form Number Series entry.

  This also depends also on the type of Department. In the case of Work Orders, you may have a Food Department that does not require the use of Work Orders because there is no equipment to maintain. In that case, you wouldn't need a Number Series.

- The **Series Type** is the Series you are sharing, i.e. Form, Work Order, Address, etc.

- Four of the last five columns correspond to the Rule columns ThisWeek, ThisMonth, ThisYear, and Total. The columns **Week**, **Month** and **Year** display how many numbers have been issued in the respective number series in these periods. Read about the Rules in "Auto-Numbering" on page 109.
- Use the **Year Reset** column to enter the number to reset a number series to at the start of a new year (resets the column Year). Normally, the value is set to 0, but there are situations where it is relevant to choose a different value. For example, different department may have different series for issued Forms. The main office may use numbers from 0, while one installation may use the Year Reset value 1000, and have the system assign numbers from that starting point at the beginning of the New Year. You must use the column Year in your Rule for this column to have any effect.

Work Flow

Every task progresses to completion through a series of steps called a Work Flow. Configuring this work flow allows AMOS to perform each of these steps in accordance with your existing procedures.

To configure a custom work flow, choose a module from the **Select Module** drop-down list and then:

1. Create a list of possible work flow 'Actions'. See "Work Flow Actions" below.
2. Create a list of possible work flow 'Statuses'. See "Work Flow Statuses" on the facing page.
3. Build work flow 'Transformations' by linking statuses to actions. See "Building Work Flow Transformations" on the facing page.
4. Assign 'AMOS Actions' to your transformations and grant access to these actions. See "AMOS Actions and Access to Transformations" on page 162.
5. Define 'Initial Statuses' for different types of records. See "Work Flow Initial Statuses" on page 164.
6. (Optional) Define 'Lock Types' and grant access to them. See "Work Flow Lock Types" on page 165.

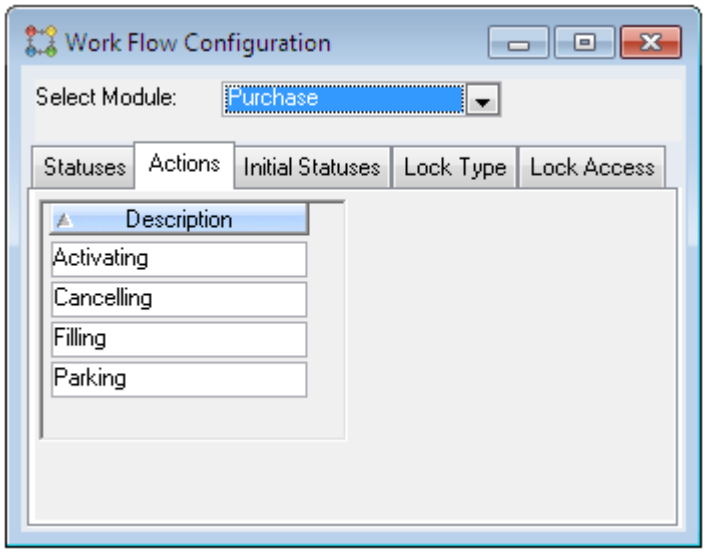
In addition to performing work flow operations while logged into the system, it is also possible for users to perform certain work flow actions from remote locations, for the AMOS Purchase module only. This is called Remote Work Flow. See "Remote Work Flow" on page 170 for more information.

When you have a work flow configuration in place, if the 'Work Flow' option is not available on the Options menu in the relevant window, check that the 'Use Work Flow' parameter[1] for that module is set to TRUE.

Work Flow Actions

Use the Work Flow window Actions tab to list all possible work flow actions which would change a record from one status to the next. For instance, define a list of all actions that could actually be carried out on a purchasing form, such as *Activating* it, *Cancelling* it , *Filing* it , *Parking* it, etc.

1. Check that the correct module appears in the **Select Module** field. Open the Actions tab.



2. Click inside the Actions tab and then click **New** on the toolbar.
3. Enter your action into the blank line.

   To remove an action select it and click **Delete** on the toolbar.
4. **Save** the list.

[1] Tools > Configuration > Parameters > Options > General > Work Flow > 'Use in <module>'

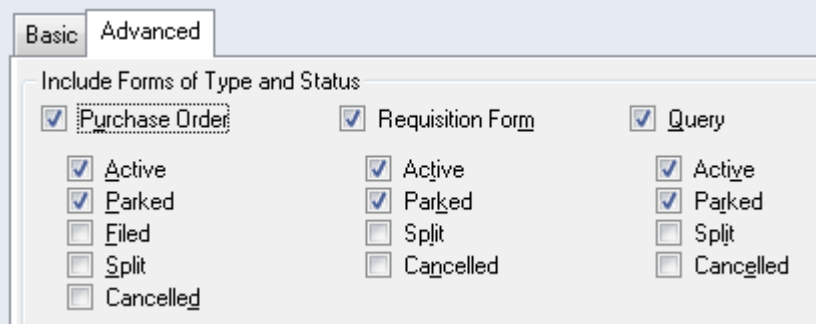
Work Flow Statuses

Use the Work Flow window Statuses tab to list all possible statuses a record progressing through the work flow could have, as actions are performed on it. For instance, define a list of all statuses that could actually be assigned to a purchasing form, such as *Active*, *Cancelled* , *Filed* , *Parked*, etc.

1. Check that the correct module appears in the **Select Module** field. Open the Statuses tab.
2. Click the **New** button on the toolbar and type a status into the blank line.
3. Flag the **In Use** checkbox to make the status available for use.
4. **Save** the list.

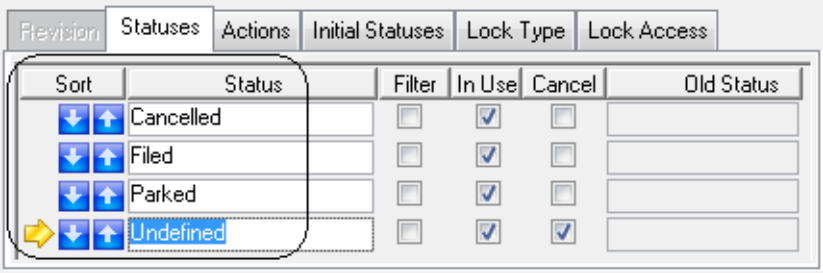
Filter Defaults and Sort Order

Window filters show a list of statuses to filter for records by:



Flag **Filter** in the Statuses tab beside any status so that it will always be flagged by default in relevant window filters.

Using the up and down arrows to the left of the **Status** column, you can move the statuses around:



The statuses listed in the applicable filters will follow the sort order you list them in here.

Cancel

Inform AMOS which of your listed statuses means 'Cancelled', by flagging the **Cancel** checkbox beside it. This sets the internal status on any record with this status to cancelled. Only one status per module can be marked to result as cancel.

Building Work Flow Transformations

Once you have a list of actions and statuses, use them to build 'Transformations' which will enable users to convert records from one status to another.

1. Check that the correct module appears in the **Select Module** field. Open the Statuses tab.
2. Click next to an entry in the **Status** column, so that the yellow arrow appears next to it. This is your 'starting status'.
3. Click the **New Action** button in the bottom middle of the tab. Then, select a **Status Action**- an action that a user would perform on the starting status.

4. Link the **Status Action** to the **Resulting Status**- the status the record ends up with after the action.

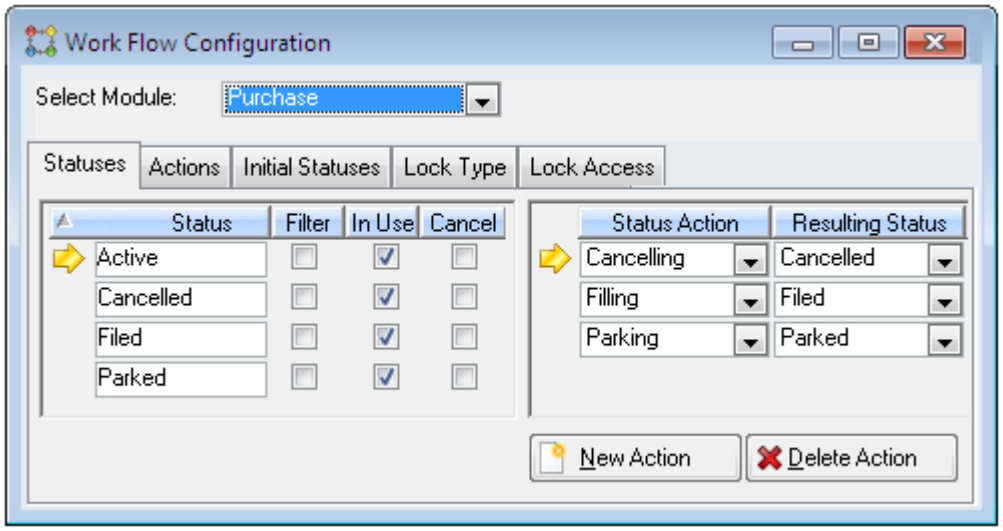
   This builds a status 'Transformation'. Create as many transformations as you need for each status:

   Status > Status Action > Resulting Status

   Active > Cancelling > Cancelled

   Active > Parking > Parked

   Active > Filing > Filed



5. **Save** the transformations.

Default Mailboxes

When a user work flows a record, he can select a mailbox to assign the transformed record to. If you define a **Default Mailbox** on a transformation, then whenever a user performs that transformation the mailbox will be suggested automatically in the Work Flow dialog. To prevent a user from changing the mailbox during work flow, flag the checkbox next to the Default Mailbox drop-down.

Expressions

You can create an expression to allow or prevent a transformation appearing in the Work Flow dialog if it meets certain conditions.

Graphical View

To see your work flow configuration mapped out as a diagram, go to **Options > Graphical View**. Flag any combination of groups listed on the right side to show their combined access rights as a black outline around the actions and statuses that apply. Grey outlines indicate that the combined group do not have access to that action or status. You can rearrange the Work Flow by dragging and dropping the arrows that connect actions and statuses.

To revert the diagram and the work flow itself to its original state go to **Options > Adjust Layout**. You can also **Export** the diagram as an image file or a metafile, from the Options menu.

AMOS Actions and Access to Transformations

Every work flow transformation needs an 'AMOS Action' to tell the system how to carry it out. Users groups also need access to the actions in order to select and use them in the work flow.

Note: See "AMOS Internal Work Flow Actions" on page 313 for a complete list of system actions and an explanation of what each action does.

To assign 'AMOS Actions':

1. Check that the correct module appears in the **Select Module** field. Open the Statuses tab.
2. Select a status and then select a transformation from your list: make sure that the yellow arrows are next to the status and transformation you want to add AMOS Actions to.
3. Click the **New Action** button in the AMOS Action area.
4. Add the AMOS Actions which will achieve the transformation:

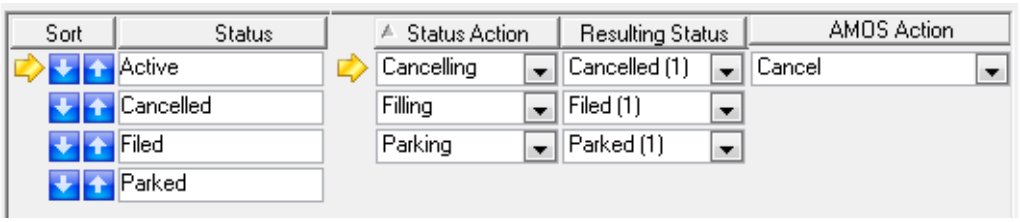
   Status > Status Action > Resulting Status > AMOS Action

   Active > Cancelling > Cancelled > Cancel

   Active > Filing > Filed > File

   Active > Parking > Parked > Park

   You might need multiple AMOS Actions on one transformation.



5. Flag the user groups in the **Access to Action <Action>** list who should have the ability to select and perform the action.
6. **Save** the tab.

Graphical View

To see your work flow configuration mapped out as a diagram, go to **Options > Graphical View**. Flag any combination of groups listed on the right side to show their combined access rights as a black outline around the actions and statuses that apply. Grey outlines indicate that the combined group do not have access to that action or status. You can rearrange the Work Flow by dragging and dropping the arrows that connect actions and statuses.

To revert the diagram and the work flow itself to its original state go to **Options > Adjust Layout**. You can also **Export** the diagram as an image file or a metafile, from the Options menu.

Note: The AMOS Action 'File Full Received' supports filing of a fully received purchase form, and is only available in the Purchase module. When a user selects this action from the Change Work Flow Status dialog on a fully received form, the new work flow status will be set according to the status defined in the transformation. If the form is not fully received, it keeps its original status. If you use this action, make sure that the action 'Receive' is also part of the list and is listed as the **second** action, **after** 'File Full Receive'. If 'Receive' is not in the list you will not be able to **Save** your configurations and if it is listed first, your configurations will not work correctly.

Copying Access to Actions

To speed up the process of assigning group access to AMOS Actions, copy the access settings from one action to another:

1. Check that the correct module appears in the **Select Module** field. Open the Statuses tab.
2. Select a **Status Action** to copy access settings *to*. It will appear in the Access to Action list.
3. Go to **Options > Copy Access From Action**.

You see a list of the module's statuses and the status actions linked to each one.

4. Select a line to copy access *from* and click **OK**.
5. The dialog closes and you'll see the access settings applied to your selected status action.

Work Flow Initial Statuses

The status a new record begins life with is called the 'Initial Status'. Define an initial status for each type of record within a selected module - for instance, types of purchase forms like purchase orders, requisitions and queries; or types of quality work orders, like periodic, requisition and corrective action.

1. Check that the correct module appears in the **Select Module** field. Open the Initial Statuses tab.

   You'll see a list of 'types' according to the module you're working on.

2. Select a starting status for each one from the **Initial Status** drop-down.
3. **Save** the tab.

NOTE: Sharing on Initial Status

Sharing may be set for work flow initial statuses with the parameter Sharing > Tables > Configuration > 'Work Flow/Initial Status'. This allows for different initial statuses on the work flows in use in different departments.

If you change this sharing, upon saving you will be asked to update the initial workflow table as well:

- clicking **Yes** will save the new setting and may update the initial workflow table.
- clicking **Cancel** will prevent saving the parameter and updating the table.

If you click **Yes**, AMOS will:

1. Copy the initial status from the department with the lowest deptID value (i.e. deptID=1).
2. Copy records to the department with the new sharing setting, for example deptID 2000003.

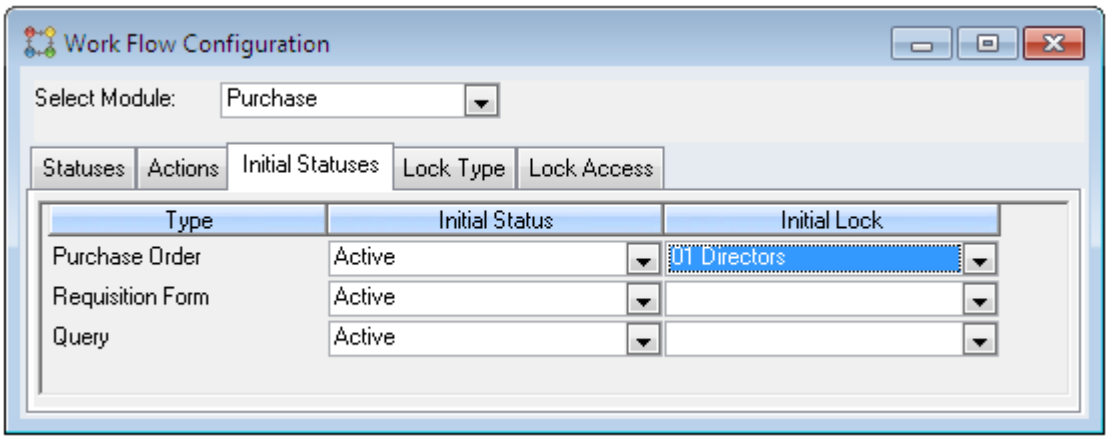
   If you set the sharing at installation level, AMOS will only copy to one department (i.e. 2000003) and not any others at the installation.

3. When sharing is then removed, the copied records are not deleted: they remain (at 2000003).
4. This department will now use the records from deptID = 1 as originally defined prior to clicking Yes and saving.

   If you later change the initial values on deptID=1 and then again introduce sharing on 2000003, these records will not be copied this time. You will get the initial values as first copied to (2000003).

Initial Locks

Initial locks are available only in the Maintenance, Purchase, and Quality Work Orders modules. If you already have a list of 'Lock Types' defined, you can choose one here to apply with the initial status of each type of record. This means the record will be created with the initial status and the corresponding initial lock applied.



Work Flow Lock Types

Another way to restrict end-user access to various work flow statuses is to assign locks[1]. Using locks, you grant specific group(s) the ability to edit records like work orders or purchase forms which are assigned a specific locking level, meaning you can control who is allowed to edit records at a particular status.

- **Lock Type**. A list of 'Locks' used to restrict or grant access to particular work flow statuses to groups of users.
- **Lock Access**. A list of all the groups that can be assigned to different locking types.

For example, you want your work orders to pass through a planning stage where they can be edited only by members of a planning team and not by other users.

To create and apply a new lock:

1. Check that the correct module appears in the **Select Module** field. Open the Lock Type tab.
2. Click **New** on the toolbar and then enter a **Code** and **Description**.
3. **Save** the lock and open the **Lock Access** tab, where your new lock will appear.
4. Flag the user **Groups** you want to allow to access any records with this lock on.

   IMPORTANT: If you do not assign access to any group, no user in the system will be able to select any work flow transformation resulting in a status with this lock applied to it. For this reason, make sure to assign access to at least one user group.
5. Open the Status tab and select a **Status** and transformation.
6. Click **New Action** in the AMOS Action section.
7. Select the AMOS Action 'Lock' and then choose your new lock from the next drop-down.
8. **Save** your changes.

Converting Work Flow Status

When you convert to using work flow if you haven't been using it previously, apply your user-defined initial work flow statuses to each type of AMOS status for existing records:

1. Check that the correct module appears in the **Select Module** field.
2. Go to **Options > Convert Work Flow Status**.

   The window for your selected module opens. In the first column, you'll see a list of all possible AMOS statuses.
3. Select your own corresponding status from each drop-down in the **To Work Flow Status** list.
4. Click **OK**.

[1] Locking and unlocking capability is only available on work flows for the Maintenance, Purchase and Quality Work Orders modules.

When you are using Work Flow for Maintenance or Purchase, the following changes occur in the application interface:

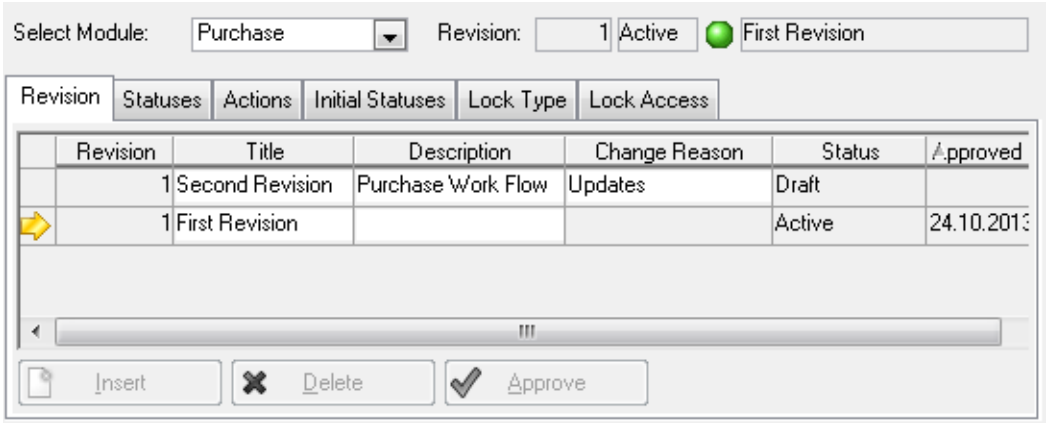
- The filters take the user-defined statuses instead of the predefined AMOS statuses.
- User mailboxes become active.
- The menu entries for performing Work Flow related processes manually are deactivated.

Work Flow Configuration Revisions

You can create a series of revisions for any Work Flow configuration.

> **EXAMPLE**
>
> You find that an active and available Work Flow configuration contains some mistakes or needs changing in any way. You create a new draft revision that is a copy of the currently active revision. This way it is easy to make your changes to the draft, without having to start all over again. Then you save and approve the new revision, rendering the previous revision obsolete.

When revisions are in use, you can see the currently selected revision's number and status at the top of the Work Flow Configuration window, and the Revision tab on the far left of the window is enabled:



To activate Work Flow revision functionality: go to **Tools > Configuration > Parameters > Options > General > Work Flow >**. Set the parameter 'Use Revision' to TRUE to allow creating and using Work Flow revisions. Once set to TRUE and revisions have been created, this setting cannot be changed back to FALSE.

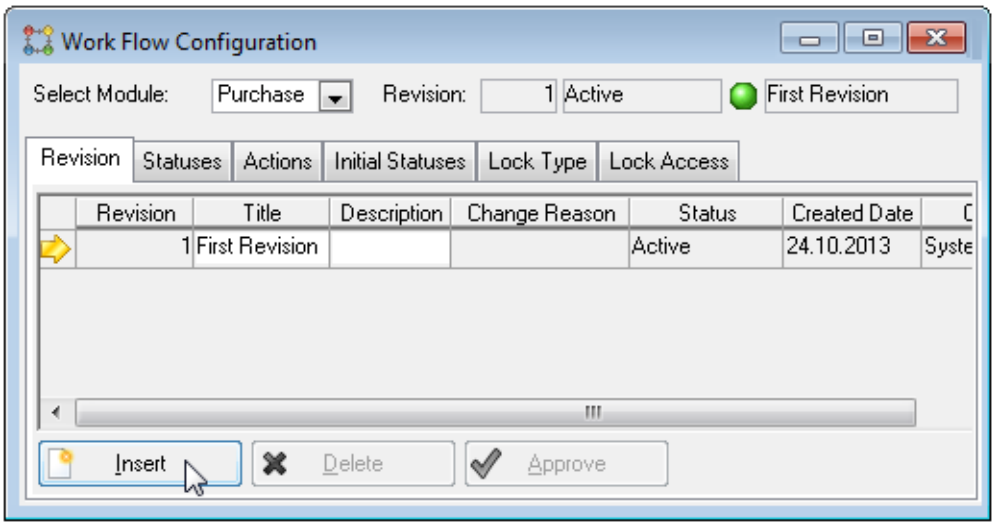
Then:

1. Revise a work flow. See "Revising a Work Flow" below.
2. Activate a new revision. See "Activating Configuration Revisions" on the facing page.

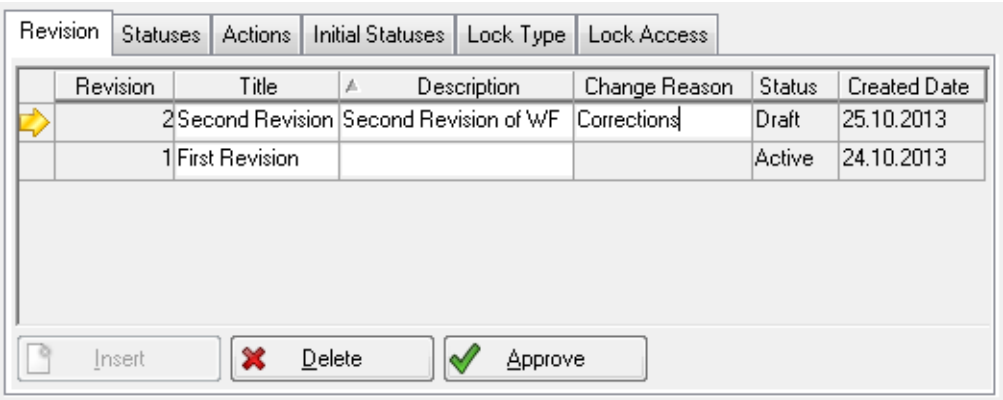
Revising a Work Flow

To revise a work flow configuration:

1. Open the Work Flow Configuration window and select a module from the drop-down list. Any existing revision(s) are listed in the Revision tab. The currently selected revision's number appears at the top of the window:



2. Click **Insert** in the Revision tab. This creates a new line with the status Draft. (Optional) You can change the **Title** and add a **Description** and **Change Reason**:



3. The content of the other tabs is copied from the last active revision; you can alter it as needed for the new revision.
4. **Save** the draft.

It is only possible to remove revisions from the list in the Revision tab if they have the status draft: the **Delete** button at the bottom of the tab will be enabled.

You can change the content of the tabs on a draft revision at any time by selecting the draft, making the changes and clicking **Save**. You cannot make changes to an obsolete or an active version.

Activating Configuration Revisions

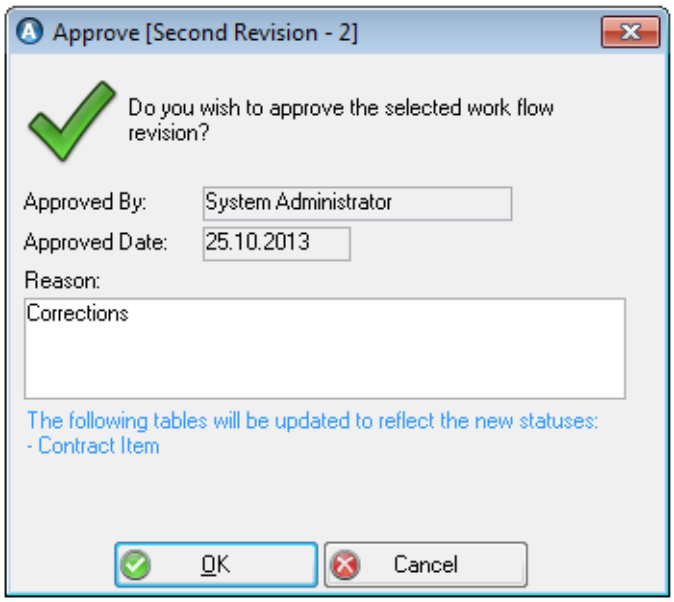
A Work Flow configuration must be active and approved to operate. For any selected module in the system, it is possible to have just one active Work Flow configuration revision and one draft revision at any time. You can have any number of obsolete Work Flow revisions for the selected module.

To make a new work flow revision active and available to users, approve it[1]:

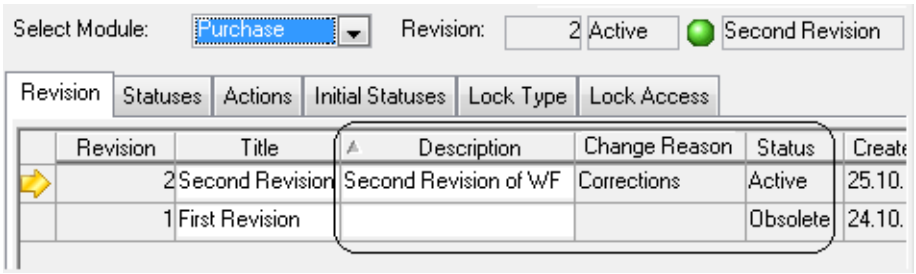
1. Select a draft revision in the Revision tab.
2. Click the **Approve** button[2] in the bottom of the tab.
3. Click **OK** in the dialog to confirm the action:

[1] Any user who is going to approve a Work Flow revision needs execute access to Common > 'Work Flow, Approve' on the Access Control window Functions tab.

[2] Approving a work flow revision requires execute access to Common > 'Work Flow, Approve' on the Access Control window Functions tab.



4. The revision is approved and its status changes to active. Any previously active revision will change automatically to obsolete:



When changing the work flow status on any records(s) in the relevant window(s), it will only be possible to select transformations belonging to the same revision as the last transformation executed on the selected record(s), was from.

EXAMPLE

'Revision 1' of a Purchase work flow configuration is active and available. A user creates a purchase order PO_1, and so the initial status on this purchase order is retrieved from the work flow 'Revision 1'. The user changes the work flow status on PO_1, selecting a transformation from the same 'Revision 1'.

In the meantime, a a new work flow configuration, 'Revision 2' is approved and activated setting 'Revision 1' to obsolete. This means that all new purchase orders created from now on, retrieve their intial status and all available work flow transformations as their status changes, from work flow 'Revision 2'.

However - when a user changes the work flow status again on PO_1, only transformations related to 'Revision 1' will be available for selection, even though this revision is obsolete.

Using the Work Flow

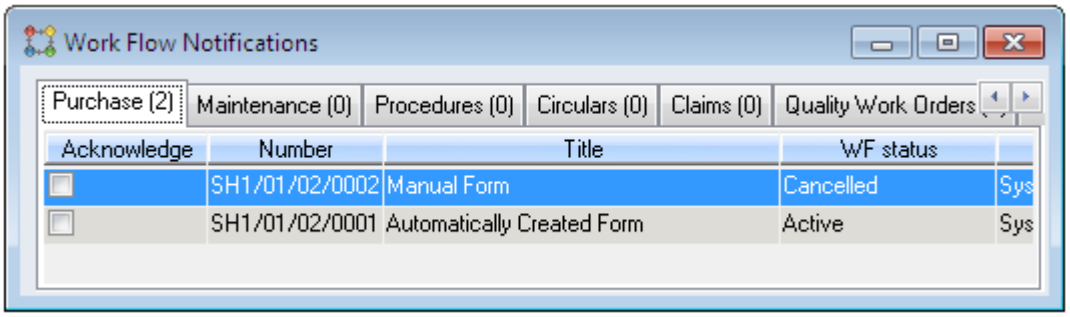
When you have a work flow configuration set up and enabled for a module, use it to change statuses on records in the relevant windows.

1. Select a record and go to **Options > Work Flow**. The available actions depend on the record's current status.
2. If there are multiple actions listed, select the one you want to use and add a comment.

3. Select a mailbox from the **Assign To** drop-down list in the Change Status dialog. If the default mailbox has been restricted, you can't change it.
4. **Click OK** and the record automatically progresses to the next stage in its defined work flow process.

Work Flow Notifications

Go to **Tools > Work Flow Notifications** to open the window listing all notifications awaiting acknowledgement in your mailbox - as the current user. To remove items from the list flag the checkboxes in the **Acknowledge** column and **Save**. Go to **Edit > Select All/Deselect All** to flag or unflag all entries at once.



These same notifications are visible on the Dashboard in the Notifications section. However, you can show or hide notifications on your dashboard by flagging or unflagging the 'Show Workflow Notification' checkbox on the **Tools > Options** window Dashboard tab.

Delegate Mailbox Access

With the correct access rights[1], users can delegate their mailbox to another user for periods of holiday etc. and then un-delegate their mailbox on return to work. Go to **Tools > Delegate Mailbox Access** to delegate it and to return it to its original owner.

With the access control 'Delegate Mailbox Access', users can delegate any user's mailbox to any other user.

Mailbox Access Log

If the access control 'Delegate Private Mailbox Access' is enabled for a user, they can view all access history for their personal mailbox by selecting **Tools > Mailbox Access Log**.

If the access control 'Delegate Mailbox Access' is enabled for a user, they can view all mailbox access history for any user's mailbox.

Transfer Mailbox Contents

This allows users to transfer their mailbox contents to other users prior to periods away from the job. Go to **Tools > Transfer Mailbox Contents** and assign a new user. Add necessary contents and uncheck modules if you do not want to transfer the entries.

Note: To avoid potential problems during mailbox transfer, all stages in the work flow process should contain a simple re-assign action without making changes to status.

[1] 'Delegate Private Mailbox Access'

Remote Work Flow

In addition to performing work flow operations while logged into the system, it is also possible for users to perform certain work flow actions from remote locations for the AMOS Purchase module only.

When a local user assigns a work flow object (i.e. a Purchasing form) in the Forms window to a user who has remote work flow activated, AMOS Business Suite sends email to that user with an HTML attachment.

The attachment looks like the standard work flow window and contains:

- Detailed information regarding the work flow object.
- A list of actions the remote user can perform.
- A list of users the action can be assigned to.

When the remote user performs a work flow action, email is sent back to the system and the action is processed accordingly. AMOS then returns a mail to the remote user to inform him of the success or failure of the operation.

The following Purchase work flow actions are not available remotely:

- File Fully Received Purchase Order
- Print
- Receive Action

Remote Work Flow Parameters

The parameters that control AMOS Remote Work Flow are system-wide. Once enabled, Remote Work Flow can then be switched on or off at user level.

Address Parameters

To enable users to perform Work Flow operations by email the system needs to access an email account for sending and receiving those mails. Set these addresses in the system parameters at **Tools > Configuration > Parameters > Options > General > Remote Work Flow**.

Mail Account User

This is a mail account user known to your mail server, which can receive the outgoing mails from the system.

Mail Account Password

The password for the user mail account.

Return Mail Address

The mail address for the system which will receive the work flow data from the remote user.

Other Parameters

The remaining parameters in the Remote Work Flow folder must also be set accordingly.

HTML Type, JSON Library

Determines the kind of HTML file AMOS will produce. Read about these in "HTML Types and Web Browser Support" on the facing page.

Mail Attachment Extension

The HTML attachment sent within the email will have the file extension defined by this parameter setting. If you do not provide an extension, AMOS uses the default 'HTML'. User-defined extensions are limited to 10 characters.

Purchase Template

A purchase template, containing the format your company uses. This will be presented to the remote user in the HTML attachment and will look similar to the normal Work Flow transformation dialog used in local Work Flow.

Send Mail

Must be set to TRUE. FALSE can only be used in the setup process (to avoid sending the mail), for debugging purposes.

Use Remote Work Flow

This system-wide parameter must be set to TRUE to allow use of remote work flow in your system. Set to true, users will have the option to turn remote work flow on in the Options window.

Directory Setting

You also need to define a directory to temporarily store the HTML files that are queued for export before they are sent to the remote user. Go to **Tools > Configuration > Parameters > Directories**:

Remote Work Flow Directory

Enter a valid folder to store the HTML files. For example, C:\Temp.

HTML Types and Web Browser Support

There are two types of HTML files which can be produced by AMOS. Which one to use is defined using the Remote Work Flow Parameters **HTML Type** and **JSON Library**. First, choose the **HTML Type.** There are two options, HTML/XML and HTML/JSON. If you select HTML/JSON, you will also need to set the JSON Library.

HTML/XML

Setting the **HTML Type** parameter to **HTML/XML** produces an HTML file containing an XML data island. This requires JavaScript to be enabled within the browser and is only supported by Microsoft Internet Explorer. This has always been supported by the AMOS Remote Work Flow.

HTML/JSON

Setting the **HTML Type** parameter to **HTML/JSON** produces an HTML file containing a JSON data island. This requires JavaScript to be enabled within the browser and is supported by most major web browsers, including Microsoft Internet Explorer.

If you select HTML/JSON, you must define a JSON library. Several libraries are available on the Internet. For example, one such library may be found at:

http://ajax.googleapis.com/ajax/libs/jquery/1.3.2/jquery.min.js

Use the parameter **JSON Library** to make the selected library available for the HTML file, either by referencing a URL or by including the library directly into the HTML file itself. This parameter lets AMOS know how the selected library should be linked to the HTML file.

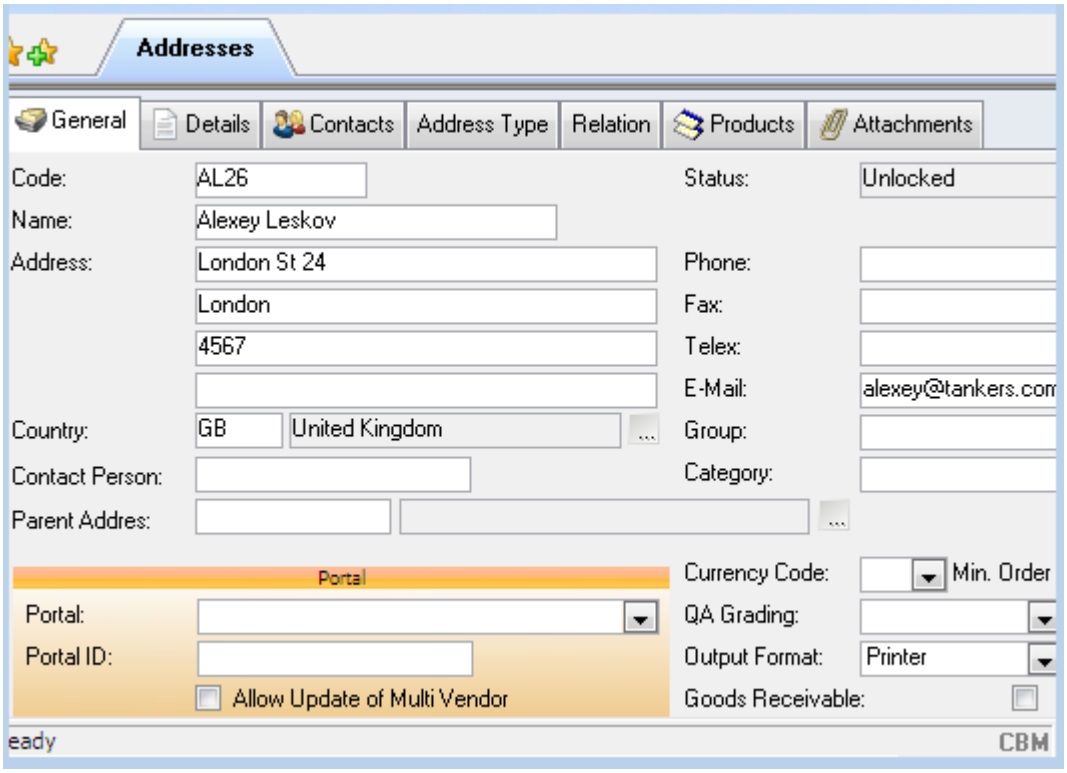
There are three values available when defining this setting:

- **INTERNAL**. Uses the java script code found internally within AMOS, and inserts it into the HTML file. This increases the size of the HTML file.
- **URL**. Links the URL you provide here, into the HTML file; this will not considerably increase the size of the HTML file.
- **FILE**. Takes the java script code contained in the selected library file, and inserts it into the HTML file. This increases the size of the HTML file produced according to the size of the selected file. You indicate the location of the library file here. Keep in mind that AMOS does not verify the content of the file - it is inserted as it is.

Configuring Remote Work Flow

To configure a Remote Work Flow, first set the parameters as described in "Remote Work Flow Parameters" on page 170. Then, for each individual in your organisation who will use remote Work Flow link an Address record to the Employee and then link their AMOS User record to their Employee record:

1. Go to **File > Open Register > Address**.
2. Click the **New** button on the toolbar.
3. Create an address record for the employee. It is mandatory that you specify their email address in the appropriate field.



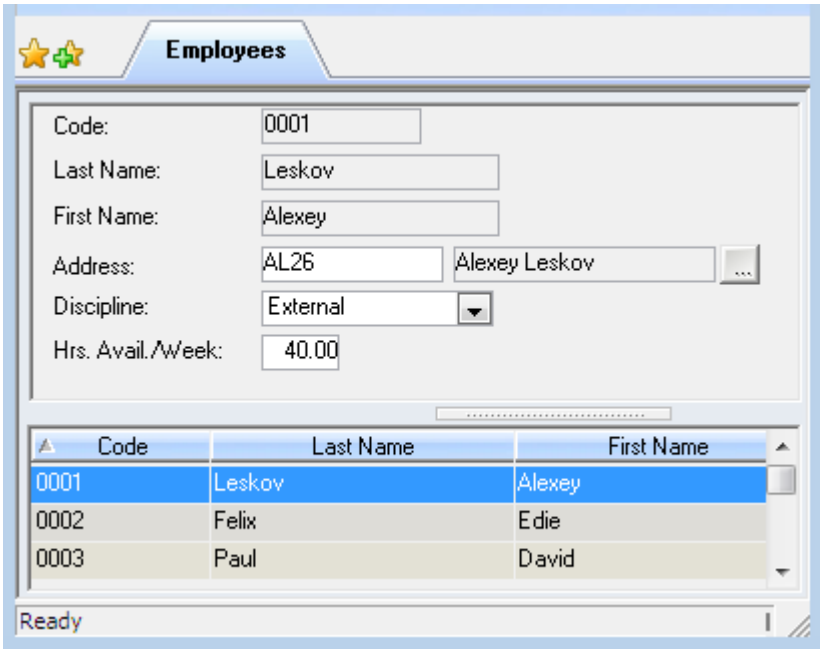
4. **Save** the record, and close the window.

   If your system license contains AMOS Personnel, carry on to step 5. If you do NOT have a license for Personnel, skip step 5 and go directly to 6.

5. Go to **Crewing > Employee**. In the Employee Overview window, click the **New** button and create a new record for the employee.

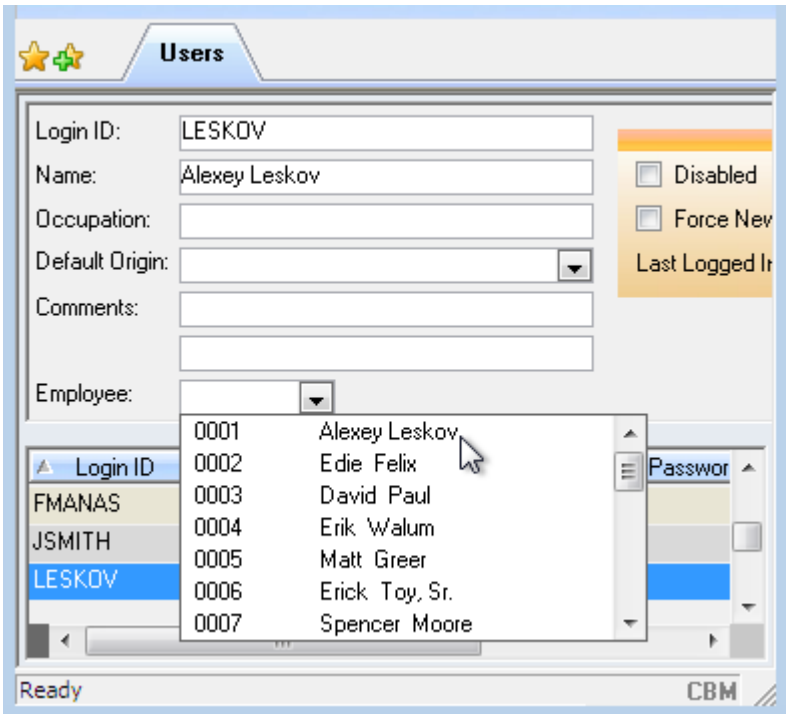
   Save the new record and close the window.

6. Go to **File > Open Register > Employees** to link the address record to the employee record.
7. In the bottom list part of the window, find the employee record and select it. The employee **ID**, **Last Name** and **First Name** appear automatically in the fields at the top of the window.
8. Click the **Address** lookup button and select the new address you created in step 3.



9. Enter a **Discipline** and the hours of **Availability**, and **Save** the record. Close the window.
10. Now link the Employee record created in step 5, to an AMOS User record:

    Go to **Tools > Configuration > Access Control > Users**. Click the **New** button in the toolbar.
11. Enter a **Login ID** and **Name**, and fill in the **Occupation** and **Comments** fields as needed.
12. Use the **Employee drop-down list to select the employee created in step 5.**



13. **Save** the record and close the window.
14. Repeat this process for every individual in your organisation who will use remote work flow.

When you are finished linking all the necessary Employee and User records, AMOS Remote work flow will be configured for those users only.

Enable Remote Work Flow for these users. See "Enabling Remote Work Flow" on the next page.

Enabling Remote Work Flow

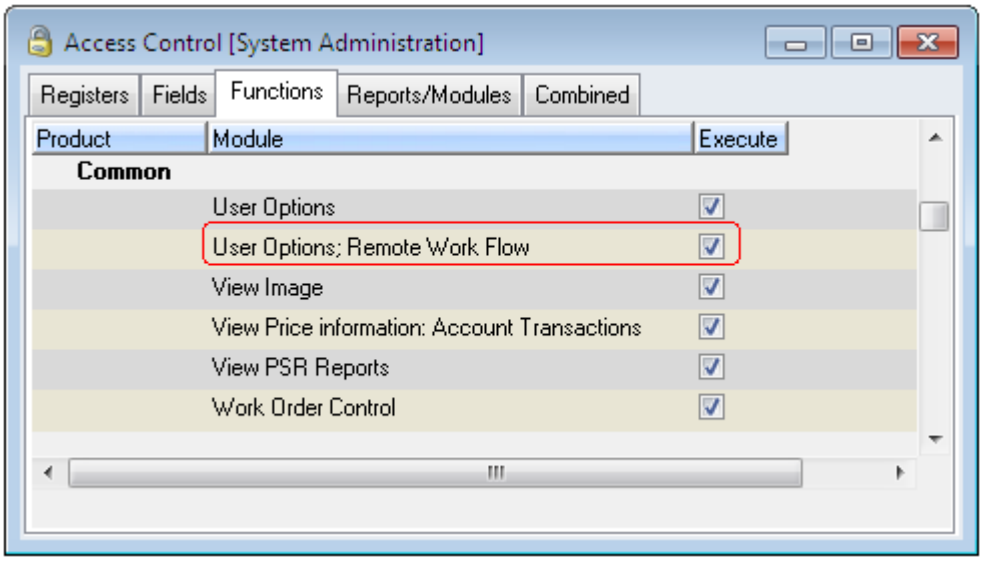
Once the remote work flow is configured enable it system-wide by activating the parameter 'Use Remote Work Flow'. Assign access control for the user groups who need it. Then, at user level each individual can turn the remote work flow on or off.

To enable remote work flow at a system-wide level (for the configured users):

1. Go to **Tools > Configuration > Parameters > Options > General > Remote Work Flow**.
2. Ensure that the parameter 'Use Remote Work Flow' is set to TRUE.

   To enable remote work flow at a user level (for the configured users):

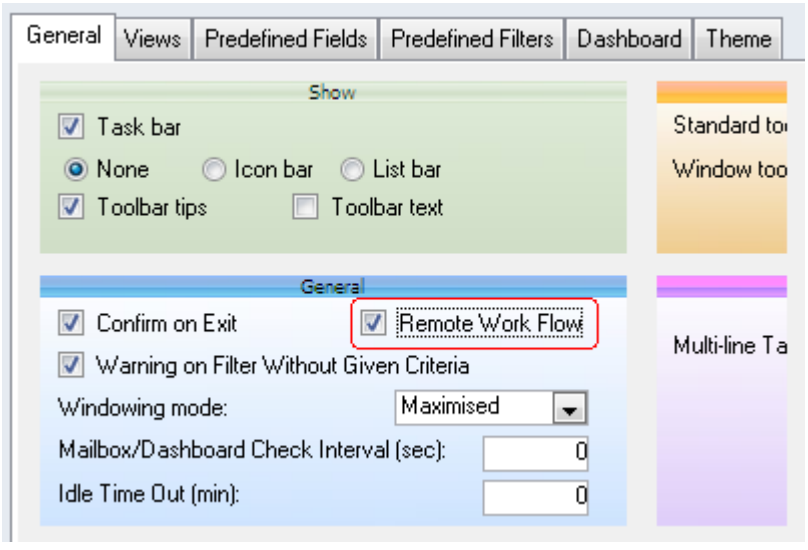
3. Go to **Tools > Configuration > Access Control > Groups**.
4. Select the user group you want to allow use of remote work flow. Then select **Options > Access Control.**
5. In the Functions tab, enable the entry 'User Option: Remote Work Flow', and then click **Save**.



   Repeat this process for each user group you want to allow to use remote Work Flow.

6. Now, at user level, each individual may turn remote work flow on in their own settings, when they wish to use it:

   Open the **Tools > Options** window. Check the **Remote Work Flow** checkbox on the General tab to enable the functionality.



Using Remote Work Flow

When a user has remote Work Flow functionality enabled and switched on and he is not logged in to the system locally, AMOS will send him email allowing him to use Work Flow from a remote location:

1. A local user opens the Forms window, creates a new form, and **Saves** it.
2. The local user performs a Work Flow transformation on the form in the work flow dialog, and assigns it to a user in the **Assigned To** drop-down list. The assigned user has remote Work Flow enabled and on.

   > **Note:** If the assigned to user does not have remote Work Flow enabled nothing happens until he processes the transformation in the usual way.

3. The system queues the form for export, and then sends an email to the assigned user. It arrives with an HTML attachment.

   > **Note:** Occasionally the remote user might receive a winmail.dat file. This is because of the mail client and/or server configuration. In this case, the remote user should forward the mail to himself and it will convert back to an HMTL document on being resent.

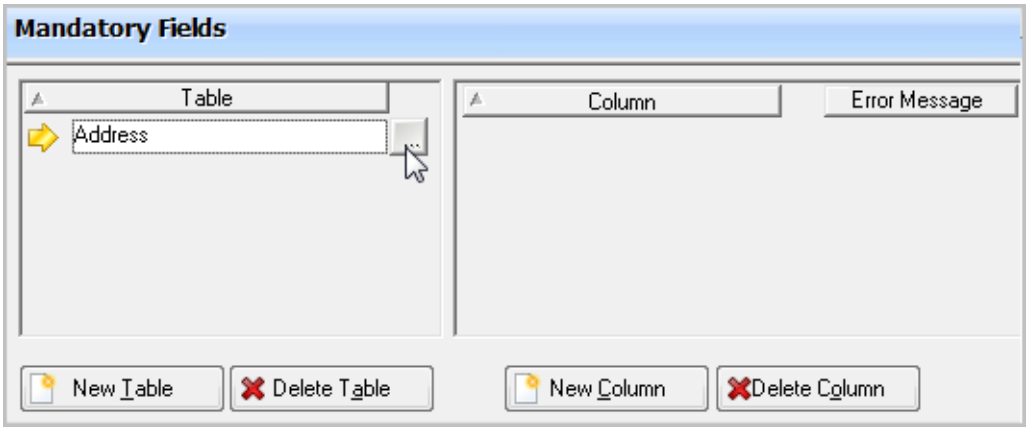
4. The remote user receives the mail and processes the HTML file in the same way he would work in the Work Flow Transformation dialog - assign to a user, selects an action to change the status, etc.
5. When finished with any changes to the HTML file, the remote user clicks **Send**. Closing the email without clicking Send causes it to be ignored.
6. The email is sent back to AMOS and processed by the system.
7. The system performs the updates to the work flow object, and saves it.
8. AMOS sends feedback to the remote user. The feedback email will contain one of three possible responses:
   - **Ignored**. The remote user modifications have been ignored because the work flow action selected contained instructions that can only be performed when logged into the system.
   - **Ignored**. The remote user modifications have been ignored because the status of the object was changed before the system received the remote user response. This can occur if, for example, the remote user has delegated his mailbox access to another user in his absence.
   - **Accepted**. The remote user modifications have been made and saved.

Mandatory Fields

You can make certain fields 'mandatory', which then prevents users from saving information in a window until all the required fields are filled. This way you can define that certain information is required on a given window. Additionally, you can define error messages which will appear when a user leaves a mandatory field blank.

To define a mandatory field:

1. Go to **Tools > Configuration > Mandatory Fields**.
2. Click the **New Table** button at the bottom left of the window.
3. Lookup the **Table** containing the field(s) you want to make mandatory:



4. Make sure the same table is selected on the left with the yellow arrow. Click the **New Column** button on the bottom right.
5. Click the **Column** lookup to see a list of all columns for that table.
6. Select the column you want to make mandatory. To select more than one column at once, hold the **CTRL** key and click on the columns. Add as many as you need.

   Note: All tables and their columns are available to select from, so it's possible to make any field mandatory whether practical or not. When defining mandatory fields, try to avoid illogical or impossible requests.

7. Click **OK** to list the column(s) on the right side of the window.
8. Enter a helpful message for each mandatory field so that users will understand the required action. For example:

   Each message can be up to 60 characters long. Keep in mind that this message will only appear if the field is left empty: AMOS does not verify the actual content a user enters in a mandatory field.

9. **Save** your work. The fields you selected here will become mandatory.

Note: The system parameter 'Interuppt Automatic Form Creation Due to Mandatory Fields' controls the automatic creation of purcahse forms with mandatory fields on. See "Purchase Parameters" on page 145 for more information.

Account Transactions

You can keep track of all transactions in the system and tie each one to a particular account code. Account codes in turn can be assigned to cost centres.

To configure account transactions:

1. Define your cost centres and grant access rights to each one. See "Cost Centres" on the facing page.

2. Define account code categories and account codes. See "Account Codes and Categories" on the facing page.
3. Link the codes and cost centres together. "Linking Account Codes to Cost Centres" on the next page.
4. Record and keep track of transactions. See "Tracking Account Transactions" on the next page.

Cost Centres

Cost centres are separate financial areas that you register expenses against and record where resources are used. A cost centre can be a department, a collection of departments, a project, a machine or any other unit/collection of units that your company wants to record transactions and costs against.

Creating a New Cost Centre

1. Go to **Tools > Configuration > Accounting > Cost Centres**.
2. Click **New**.
3. Enter a **Code** and **Name**.
4. Select a **Parent** cost centre, if any. This creates a hierarchy in your cost centres.
5. Flag **Has Stock** if the cost centre can be applied to stock transactions: that is, transactions involving a warehouse or storeroom.
6. The **Active** checkbox is for temporary cost centres such as a project and can be unchecked once the cost centre is no longer required. Flag it to activate your new cost centre now.
7. **Save** the cost centre.

Defining Cost Centre Access

To set access to cost centres:

1. Go to **Tools > Configuration > Access Control > Groups**.
2. Select a user group.
3. Go to **Options > Cost Centre Access**[1].
4. Click **New** and then use the lookup to select a cost centre.
5. **Save** and exit the window.

Cost centres for each group must be specifically identified for that group to use it. If you do not attach a particular cost centre to a group, users in that group will not have access to it.

Account Codes and Categories

All account transactions are stamped with an account code as they occur. Account codes are the fundamental unit for recording the types of expenditures and events. They can define anything from manpower to materials, assets, and so on.

Before you start defining account codes, check that you have got Account Code Categories to group them into.

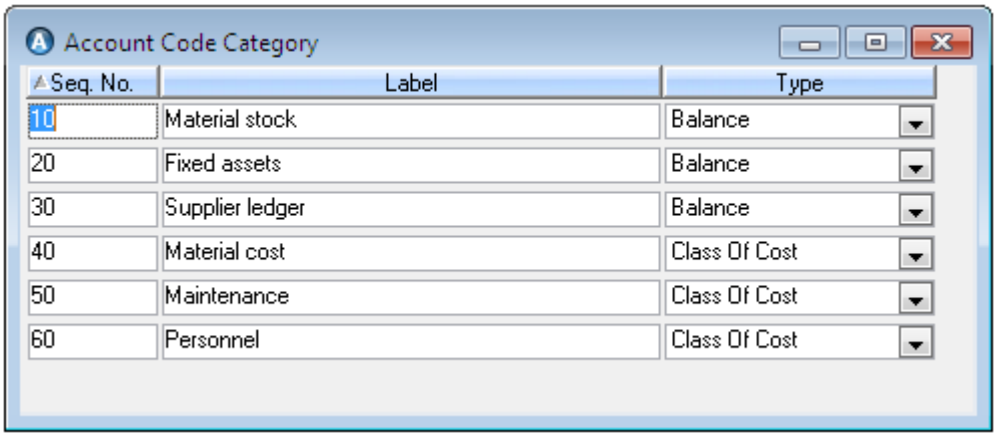
Account Code Categories

Account code categories are for grouping similar account codes together. To add a category to the register:

1. Go to **Tools > Configuration > Accounting > Account Code Categories**.
2. Click **New**.
3. Enter a numerical value in the **Sequence** field and a name for the category in the **Label** field.

[1] The option is only available when accounting is active in the system.

4. There are three account **Types** to choose from:
    - **Balance**. Accounts which accumulate value: stock accounts, capital value accounts, fixed asset accounts, and so on.
    - **Class of Cost**. Accounts for recording expenses.
    - **Generic**. Accounts with no restrictions on how they can be used. Mainly for backwards compatibility with earlier versions of AMOS which did not have account code categories; however since they do not have any restrictions, they can be used broadly.



5. **Save** the register.

Defining Account Codes

To add account codes to the register:

1. Go to **File > Open Register > General > Account Codes**.
2. Select an **Account Code Category**.
3. Click **New**.
4. Enter a **Code** and **Description**.
5. Flag 'Active' to make sure the code is available for use.
6. **Save** the register.

Linking Account Codes to Cost Centres

Once you have set up cost centres and created account codes, define which account codes should be available for each cost centre. When performing transactions, only account codes linked to the selected cost centre will be available for selection.

To link an account code to a cost centre:

1. Go to **Tools > Configuration > Accounting > Cost Centres**.
2. Select a cost centre and go to **Options > Accounts**.
3. Lookup an **Account Code**.
4. Click **New** to add another account code to the same cost centre.
5. **Save** and close the window.

You can also connect account codes to budget codes in the same window, so that the expenses are accrued to the Budgeting module as well.

Tracking Account Transactions

When users perform financial transactions in the following areas of the system, AMOS logs them in the Account Transactions window:

- Vouchers
- Transport Documents
- Stock Transactions - Purchase Order Receipt, In/Out of Stock, Stock Control
- Transfer Document Transfer/Receipt
- Work Order Reporting

In the Account Transactions window you can alter unlocked transactions, and also generate manual transactions, if you've got the correct access rights.

To add a manual transaction:

1. Go to **Tools > Account Transactions**.
2. Automatically recorded transactions are listed in the bottom of the window: click **New** to create a manual account transaction.
3. Connect it to the order form, voucher, or other document its related to.
4. Save the window.

Note: If your system license includes **On Board Accounting**, then at the bottom of this window you can include **Employee** and **Period** information to the account transactions.

Audit Trails

Placing an audit trail on one or more columns in a table in AMOS Business Suite lets you track every change made in the selected window/field(s): the original value, the new value, the date of the change made, the operation performed on that record (i.e. insertion, deletion or update), and the user ID of the person who made the modifications.

To set up and use an audit trail:

1. Configure the audit trail and assign access. See "Audit Trail Configuration" on the next page.

   (Optional) Set the audit trail to prompt users for reasons whenever they make a change. See "Setting an Audit Trail to Require Change Reasons" on page 184.

   (Optional) Some Bureau Veritas reports require certain audit trail columns and triggers in place, in order to run successfully. See "Bureau Veritas - Audit Trail Reports" on page 183.
2. Generate triggers to activate the new audit trail. See "Activating an Audit Trail" on page 189.
3. View the results in the Audit Trail Log. See "Viewing Audit Trail Results" on page 189.

It is also possible to record all login activities on the system in the Login Audit Log. See "The Login Audit Log" on page 190.

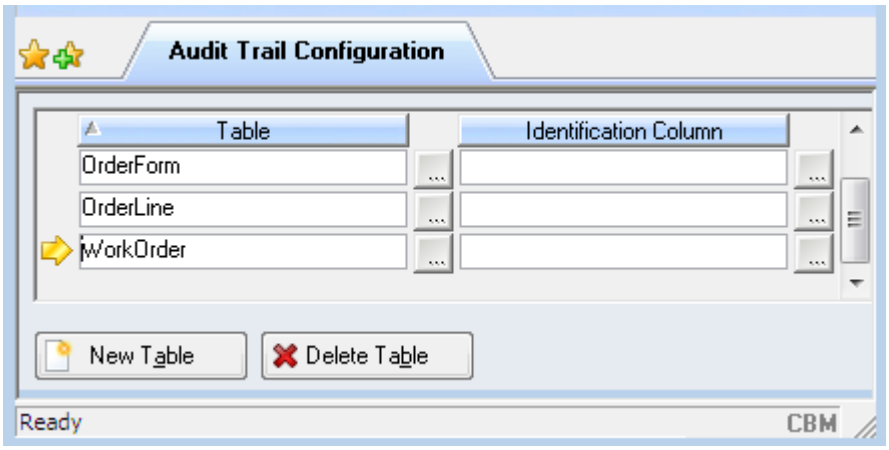
Note: SpecTec recommends that as general procedure, audit trails are configured on each installation's database. However, it is also possible to configure an audit trail at an Office installation and then synchronise the configuration with Vessel installations - consult your local SpecTec office about setting up this procedure. In such a case the vessels must be running the same version of AMOS as the office is; or, only using columns which are present in both versions. Once the configuration is present in all the vessels, on the vessel databases call the stored procedure amos.p_enableaudittrail (1) and the stored procedure amos.CreateAuditTrailTriggers(1); if you are using AMOS Replication for synchronization these procedure calls can be managed using the SQLCommand table.

Audit Trail Configuration

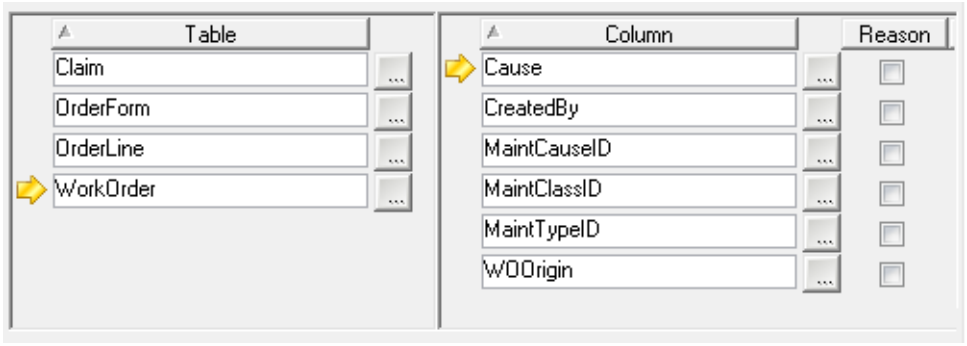
Configuring an Audit Trail

To configure an audit trail, decide which tables/columns[1] you want to audit. Then:

1. Go to **Tools > Configuration > Audit Trail Configuration**[2].
2. Click **New Table** at the bottom of the 'Table' section.
3. Select a table to place an audit trail on:



4. Keep the table selected and click the **New Column** button.
5. Lookup a column you want to audit in the selected table.
6. Click **New Column** again to continue adding as many columns as necessary:



7. The listed column(s) only apply to the table currently selected on the left.
8. For each column, flag one, two or all three checkboxes 'Insert', 'Edit' and 'Delete', to indicate the type of changes you want to track in this audit trail:



9. **Save** the configuration.

---

[1] To put an audit trail on a column, the column must exist in both the office and vessel installation.

[2] You can only open this window if the > General > Database > 'Compatible to Version' parameter is set to 'Current' or to 8.5.00 or greater.

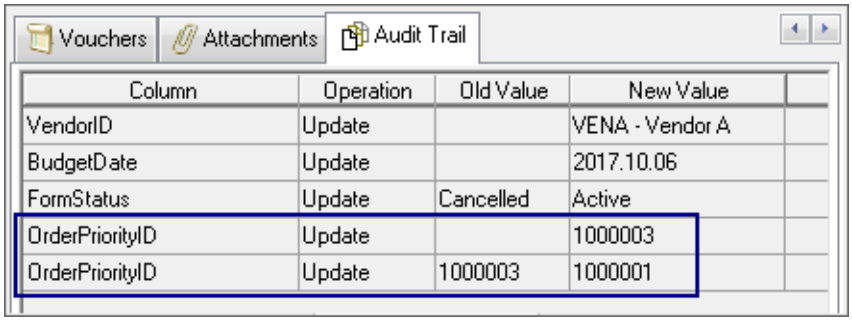
Audit Trail Log Access

The results of any audit trail you configure will only be available in the Audit Trail Log to users with the necessary access:

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Choose a table with an audit trail configuration in place.
3. Flag user groups on the right side of the window to allow access.
4. **Save** the settings. Users belonging to flagged groups will be able to select the table in the list for the Audit Trail Log viewer.

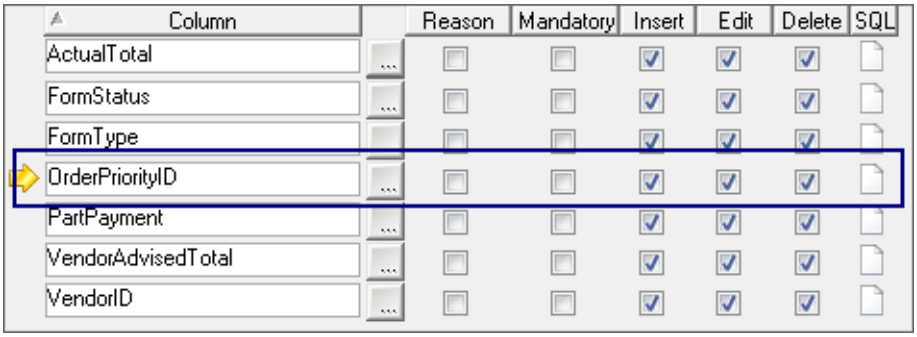
Defining an SQL on an Audit Trail Configuration

In some cases audit trail results will show up in the audit trail log using the value's internal ID rather than the actual label on the value itself. In this example from the Forms window, you can see that an audit trail placed on the column 'OrderPriorityID' by default returns the internal IDs 1000003 and 1000001 which correspond to the order priority values 'Low' and 'High':



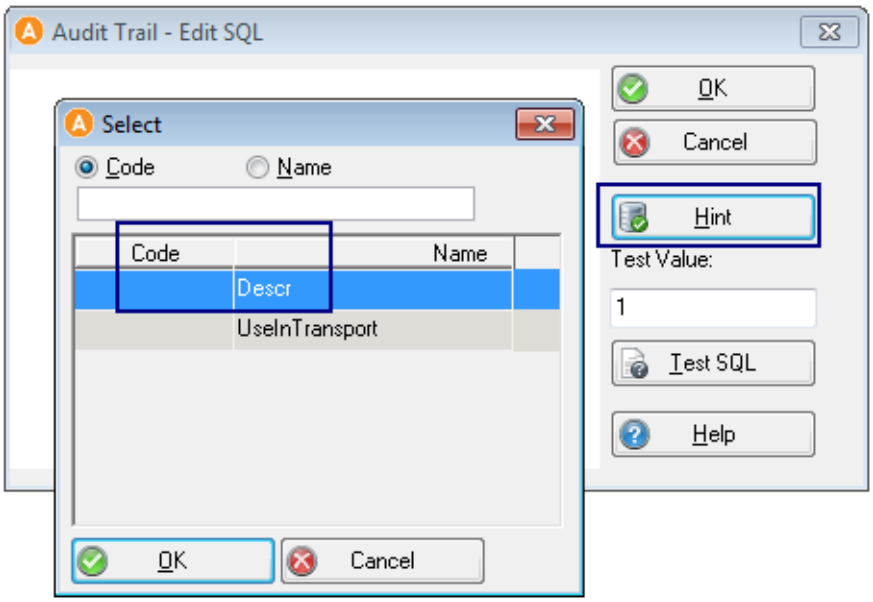
To customise the audit trail configuration to return values in a way you'd like, you can write an SQL on any column in the configuration. So in this case, to return the order priority values as text:

1. Open the Audit Trail Configuration window and select (or create) the configuration for the Forms window.
2. Click the SQL button next to the 'OrderPriorityID' column:

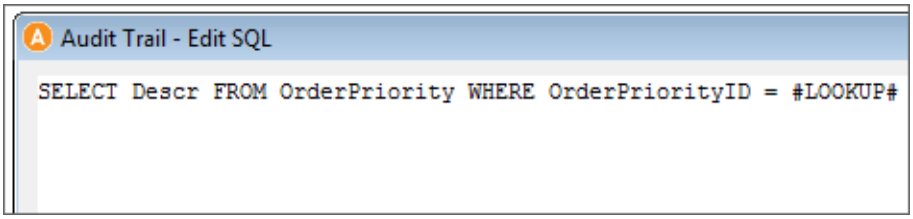


   This opens the Audit Trail - Edit SQL dialog.

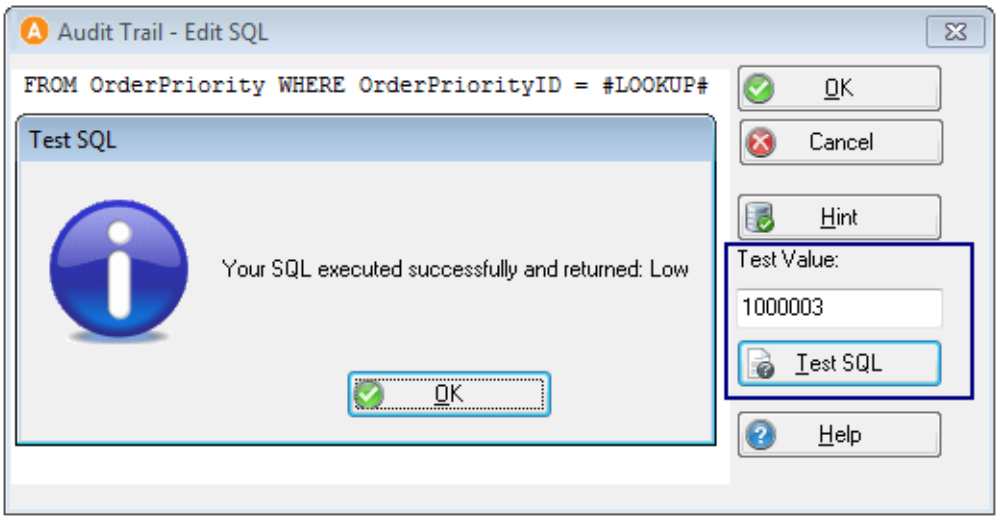
3. Since the 'OrderPriorityID' has a foreign key, AMOS can help you out with a list of related columns and building the SQL statement. Click **Hint**:



Select a column, in this case 'Descr' and click **OK**. The SQL AMOS produces will contain the keyword #LOOKUP#:



4. To verify your SQL, try entering one of values you are trying to conver t to text in the **Test Value** field. In this case, one of the order priority internal IDs, 1000003:



Click **Test SQL**: you'll see that the internal ID 1000003 converted successfully to 'Low'.

5. Click **OK** to leave the dialog. You can see that an SQL statement is present on the 'Order-PriorityID' column now, because the SQL button is shaded:



6. Generate triggers for your new/modified audit trail configuration, and **Save** and exit the window.

Returning to the Forms window, from now on you'll see that changes to the **Order Priority** column there show the actual priority values in the Audit Trail Log tab, instead of the internal IDs:



Column	Operation	Old Value	New Value
VendorID	Update		S&J - S&J Trading Inc
BudgetDate	Update		2017.10.06
CurrencyCode	Update	USD	EUR
FormStatus	Update	Cancelled	Active
OrderPriorityID	Update		1000001
OrderPriorityID	Update	1000001	1000003
OrderPriorityID	Update	Low	Medium
OrderPriorityID	Update	Medium	High

If the column you are trailing does not have a foreign key, you'll need to build your own SQL. For example, to convert 0 and 1 to text:

```
SELECT txt
FROM (
select 1 id, 'Yes' txt union
select 0, 'No' ) t
WHERE id = #LOOKUP#
```

Bureau Veritas - Audit Trail Reports

To run successfully, the Bureau Veritas reports listed below require certain audit trail columns and triggers in place:

Component Based System

- Class Code Changes - Components
- Due Date Changes - Components
- Planned job Changes - Components

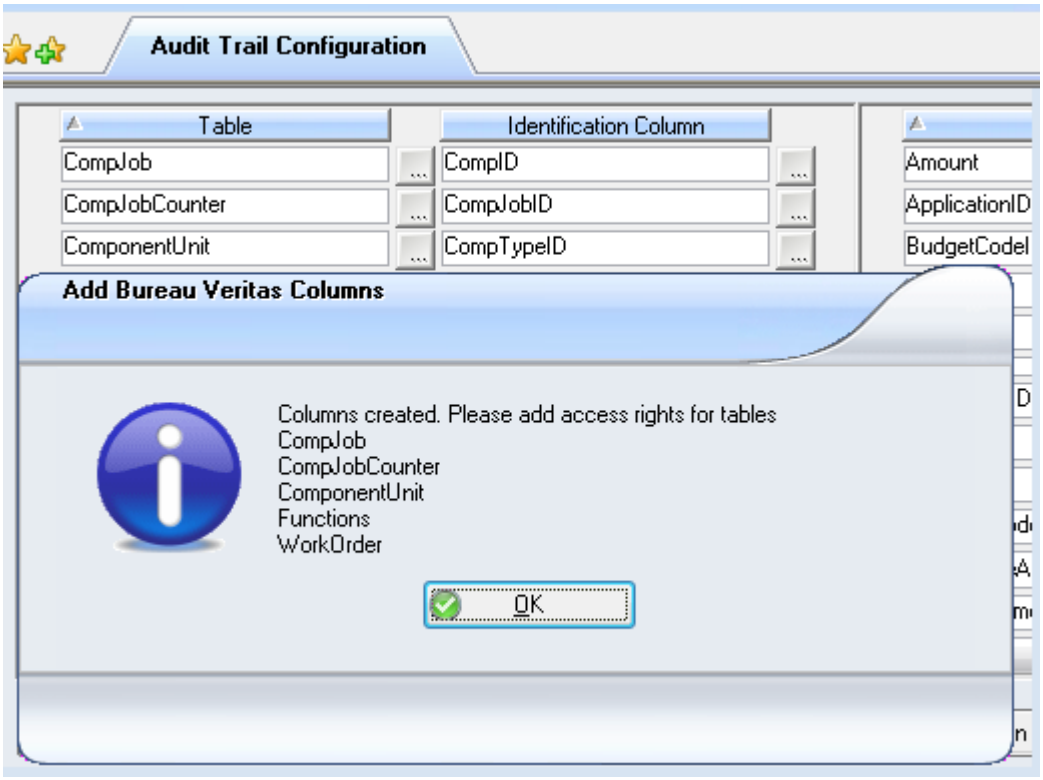
Function Based System

- Class Code and Criticality Changes - Functions
- Due Date Changes - Functions
- Planned job Changes - Functions

If a user tries to execute any of these reports before the audit trails are in place, the reports will not run. With the correct access rights, you can add the necessary columns first to make sure there are no problems.

To add all the necessary columns:

1. Go to **Options > Add Bureau Veritas columns**.
2. Click **OK** in the dialog, and the appropriate tables and columns are added automatically.



3. Flag the user groups on the right side of the window, who should access each table in the list.
4. **Save** the configuration.
5. Enable it by generating the triggers. The relevant reports will now run correctly.

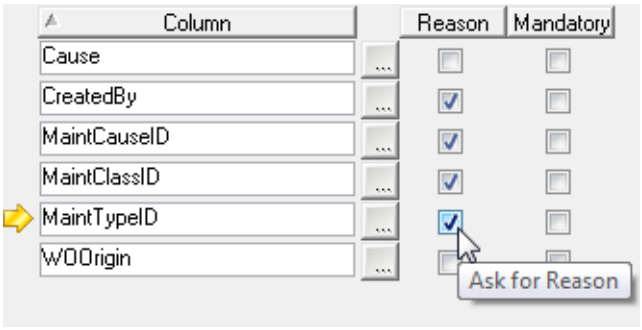
If the audit trail for these columns has not been set the first time a user attempts to run the relevant reports, AMOS will give the user the option to configure the audit trail for the columns immediately. The Audit Trail Configuration window will open and the columns will be inserted automatically. The user can assign group access and generate the triggers, before returning to the reports. If the user does not have access to this window, the reports will not be available.

Setting an Audit Trail to Require Change Reasons

You can set an audit trail to require a reason when a user makes a change to an audited field: AMOS will prompt the user to provide a reason for the change before saving the window. Acceptable reasons can be free-text, or selected from a pre-defined list of reason codes.

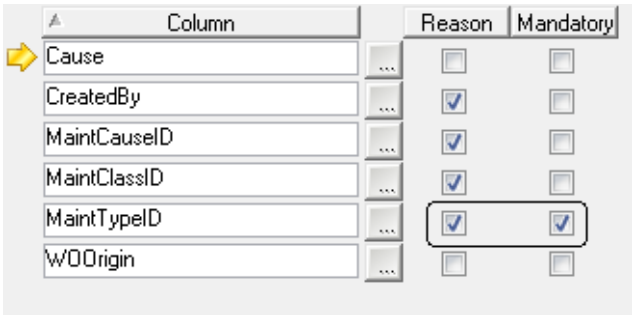
To require reasons on an audit trail:

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Click next to a table on the left side.
3. Flag the **Reason** checkbox next to any column in the table's list which you want AMOS to prompt for a change reason on.



When a user makes any change to one of these columns, upon saving the window he/she will be prompted with the Audit Trail Reason dialog to provide a free-text reason. However, he/she can bypass the dialog without actually providing a reason.

4. To prevent users from bypassing the Reason dialog on a column flag the **Mandatory** checkbox:



Now, when a user makes a change to such a column AMOS will prevent bypassing the dialog and saving the window, until the user provides a reason. Reasons will be recorded in the Audit Trail Log, and the Audit Trail tab on the audited window if applicable.

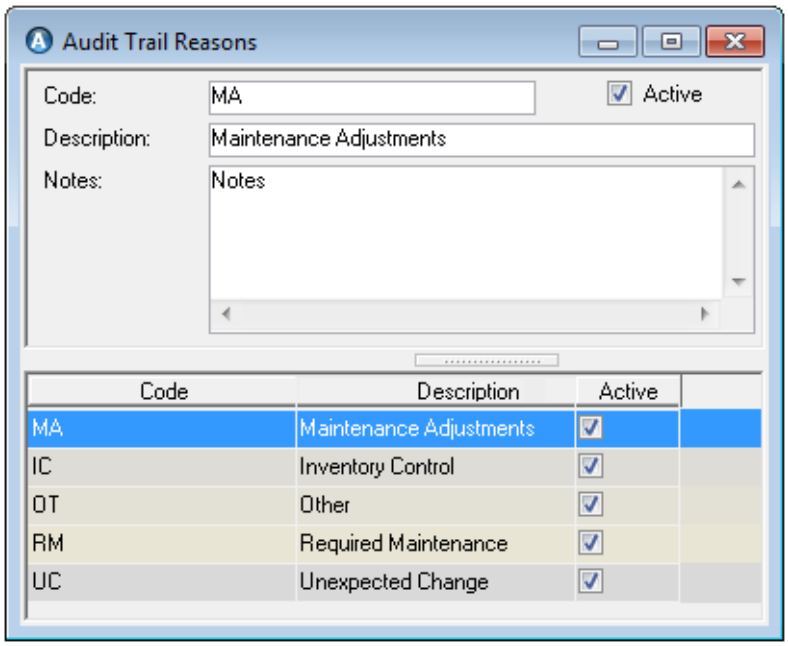
5. **Save** the configuration.

Using Reason Codes

If you've already set an audit trail to require reasons for changes users make to certain fields, you can configure an audit trail to accept predefined 'reason codes' in addition to or instead of free-text reasons.

Defining a List of Available Reason Codes

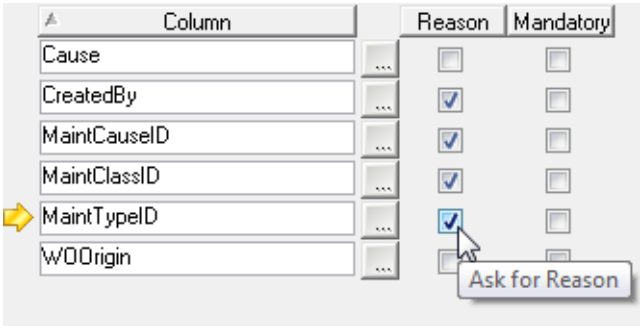
1. Go to **File > Open Register > General > Audit Trail Reason**.
2. Click **New**.
3. Add a **Code**and **Description**, like 'Maintenance Adjustments' or 'Inventory Control'.
4. Add an explanation in the **Notes**area.
5. Flag 'Active' to include the reason code in the Audit Trail Configuration window and lookup lists.



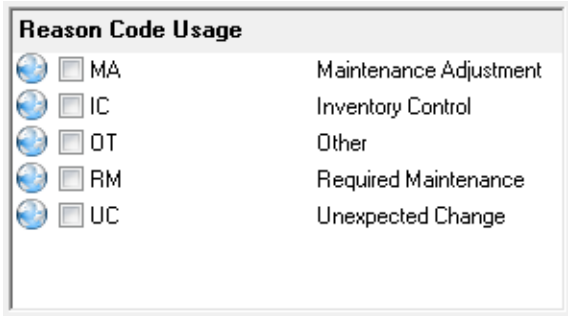
6. **Save** and exit the register.

Assigning Reason Codes to Audit Trails

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Select an audit trail configuration.
3. Flag the **Reason** checkbox on any column(s):



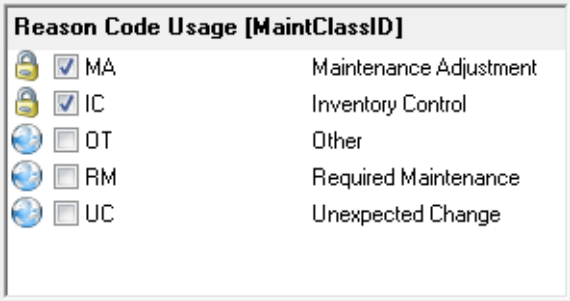
4. Active reason codes appear in the right side of the window:



5. Flag any which apply:

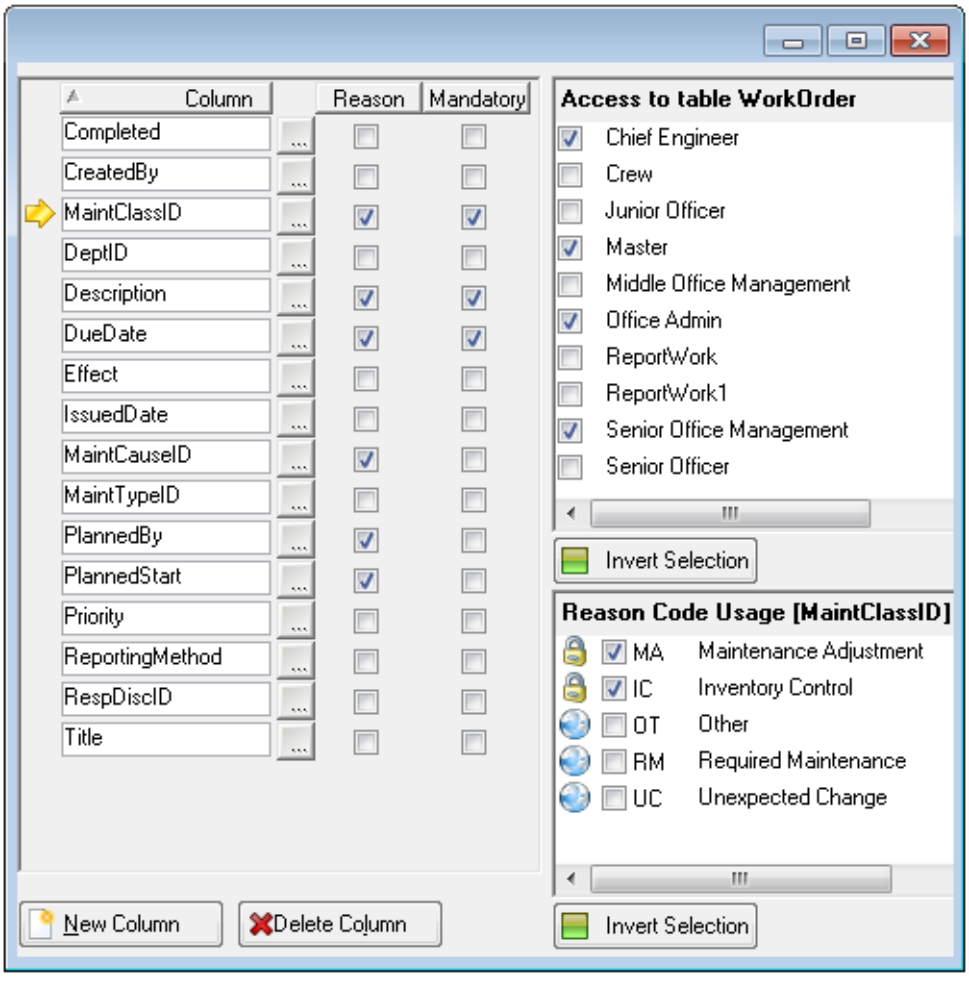
   Once a code has been flagged for a column, it will *only* be available on that column and on any other column where it is flagged. The icon beside flagged codes changes to a padlock when you **Save**.

A reason code which is not flagged on *any* column in the entire configuration will be available on every audited field where **Reason** is flagged. The icon beside unflagged codes remains the same.



When a user changes a flagged field with reason code(s) available, he/she can select a code or enter a free-text reason.

6. To prevent users from bypassing the Reason dialog, check the **Mandatory** box next to the column.



7. **Save** the configuration.

T i p

A reason code which is not flagged on *any* column in the entire configuration will be available on every audited field where **Reason** is flagged. To prevent unused reason codes from showing up on every audited field in the configuration, add an unused column you do not need to audit, and flag all the remaining codes there.

Providing Change Reasons on Audited Fields

When an audit trail is configured to prompt for a reason when a user changes certain fields, the user cannot save the window in question until providing a reason for the change(s). Reasons will be recorded in the Audit Trail Log, and the Audit Trail tab on the audited window if applicable.

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:

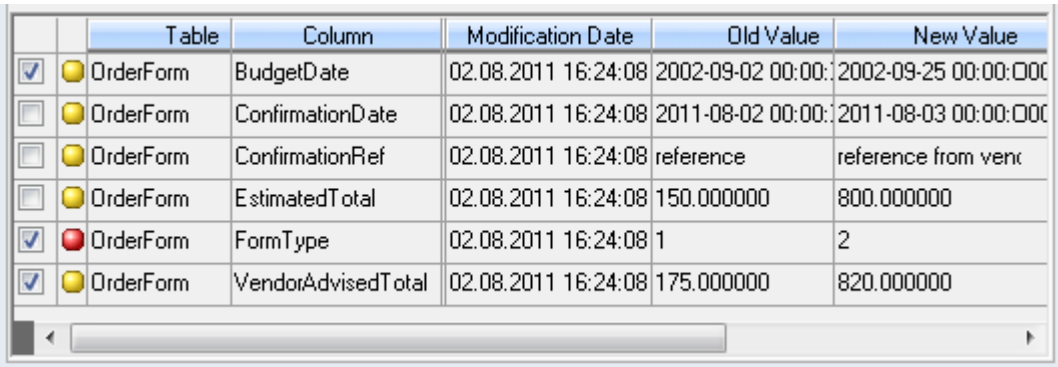
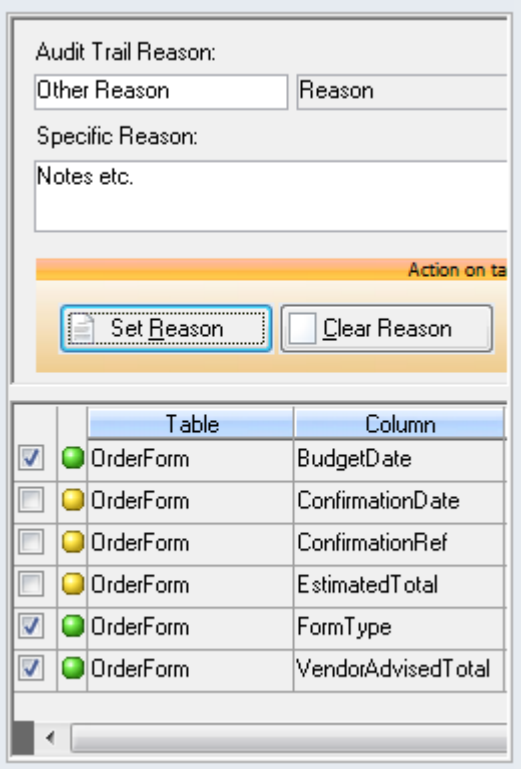


		Table	Column	Modification Date	Old Value	New Value
☑		OrderForm	BudgetDate	02.08.2011 16:24:08	2002-09-02 00:00:	2002-09-25 00:00:00
☐		OrderForm	ConfirmationDate	02.08.2011 16:24:08	2011-08-02 00:00:	2011-08-03 00:00:00
☐		OrderForm	ConfirmationRef	02.08.2011 16:24:08	reference	reference from ven
☐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

3. Fields where a reason is mandatory are marked with a red ball. To apply the same reason to several fields at once, flag multiple fields.
4. Click the **Audit Trail Reason** lookup and select a reason code[1].

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

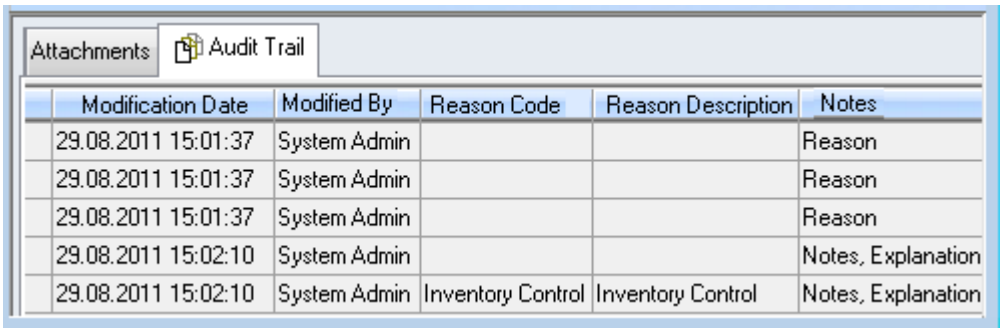
   If reason codes are in use and mandatory, the dialog will not accept a free-text reason.
5. Click **Set Reason**. The icon beside each checked field will turn green for a valid reason.



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

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

7. Click **OK** to return to the main window.
8. 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:



Modification Date	Modified By	Reason Code	Reason Description	Notes
29.08.2011 15:01:37	System Admin			Reason
29.08.2011 15:01:37	System Admin			Reason
29.08.2011 15:01:37	System Admin			Reason
29.08.2011 15:02:10	System Admin			Notes, Explanation
29.08.2011 15:02:10	System Admin	Inventory Control	Inventory Control	Notes, Explanation

Activating an Audit Trail

When your audit trail configuration is final and saved, generating audit trail triggers activates it:

1. Go to **Tools > Configuration > Audit Trail Configuration**.
2. Select the table the configuration is for.
3. Go to **Options > Generate Triggers**.
4. AMOS asks if you want to create triggers. Click **Yes**.
5. Exit the window.

If you do not do generate triggers, you will be prompted to do so on closing the window. You must generate the triggers to activate a new or changed audit trail for use.

Once configured and enabled, users can view the results of an audit trail in the Audit Trail Log[1], or in the Audit Trail tab available on some windows.

Viewing Audit Trail Results

Results of an audit trail are available to view in two places:

- the Audit Trail Log, according to user access; and,
- the Audit Trail tab available on some windows throughout the application which contain auditable fields.

The Audit Trail Log

The results of any audit trail you configure will only be available in the Audit Trail Log to users with the necessary access. Access to audit trails is set by table in the Audit Trail Configuration window.

To view the audit trail log:

1. Go to **Tools > Audit Trail Log**.
2. The tables you have access to are listed in the bottom of the filter General tab. Select one or more.
3. (Optional) Filter according to **Operations** (Insert, Update and/or Delete) as well as by a range of **Dates** or by the user who **Modified** the audited fields. Open the Reason tab to lookup a reason code to return only changes made with that reason assigned.
4. Click **Filter** to open and view the log window. Filtered tables are listed on the left side of the window.

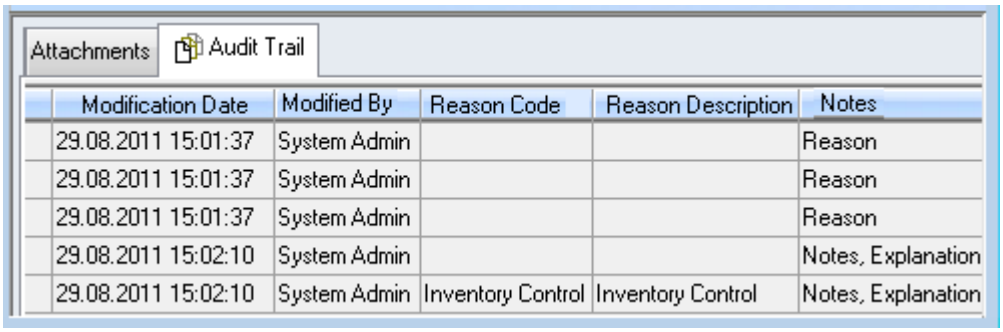
In some windows it is possible to access the Audit Trail Log window through the Options menu, if any audit trail log triggers are enabled in that window.

[1] According to user group access assigned on the audit trail configuration.

Note: The Audit Trail Log for a deleted record can only be accessed in the Audit Trail Log window - not in the current window tabs or options menus.

The Audit Trail Tab

An Audit Trail tab is available on some windows throughout the application which contain auditable fields:



The tab shows a record of all changes to audited fields in the current window.

The Login Audit Log

The Login Audit Log tracks and displays a record of all the login activities taking place in the system. It is activated by a parameter setting:

1. Go to **Tools > Configuration > Parameters > Options > General > System Access >**.
2. Select the parameter 'Create Login Audit Trail'.
3. Set it to TRUE.
4. **Save** and exit the window.

Then, to view the eventual log:

1. Go to **Tools > View Login Audit Log**.
2. The log opens: you can see **Login ID**, **User Names**, **Login** and **Logout** times and **Host** names, as well as the status of the attempt: Success, Invalid password, No such user, etc.

CHAPTER 6

The AMOS User Interface

This chapter includes the following topics:

User Options 192
Dashboard Alerts 211
Overview Panels 221
Translating Text in AMOS 223

SpecTec

User Options

The **Tools > Options** window is for customising certain aspects of the AMOS user interface and experience:

- General. Control things like navigation, toolbars, tooltips and certain behaviours across the system.
- Views. Create and save frequently used screen configurations.
- Predefined Fields. Create and save field configurations to appear in certain windows by default.
- Predefined Filters. Predefine the criteria to be populated onto any selected filter.
- Dashboard. Enable/disable the dashboard, and customise the alerts list present on it.
- Theme. Tailor the general appearance of AMOS using custom or predefined themes.

Access to the Options window settings is controlled by the 'User Options' entry in the Access Control window Functions tab. Without access you cannot reset options.

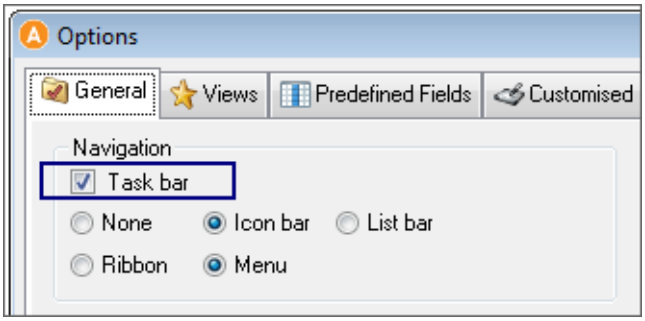
General User Options

The **Tools > Options** window General tab contains settings which control things like navigation, toolbars, tooltips, and certain behaviours across the system. Settings apply to the currently logged in user only.

Task Bar

You can show or hide the task bar:

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



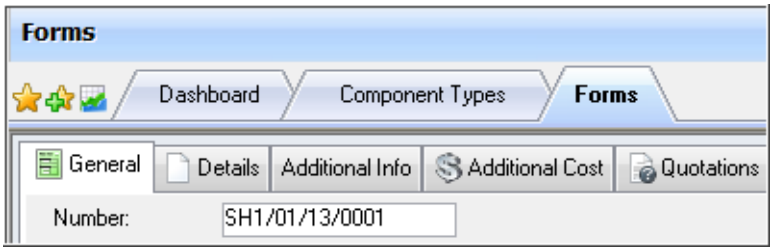
2. Click **OK** to exit the dialog with your setting applied.

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

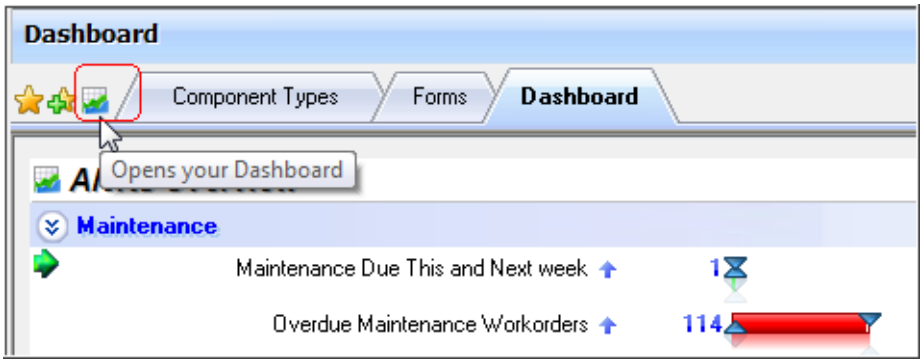
1. Switch the task bar on in the General tab.
2. Open the Theme tab and select a **Position** and **Style** for the task bar:



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



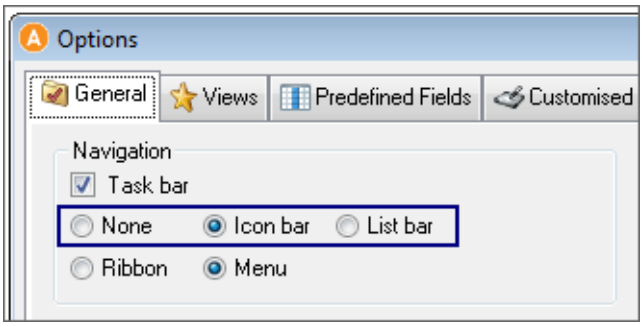
When other windows are open, clicking the dashboard icon on the task bar returns the dashboard to the front of your screen, leaving the other windows open underneath:



List Bar or Icon Bar

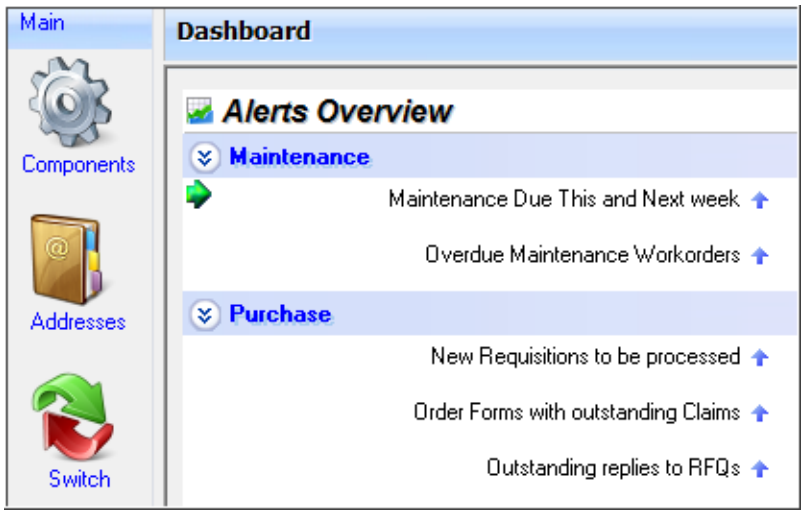
You can choose to have an Icon bar or a List bar present:

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



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

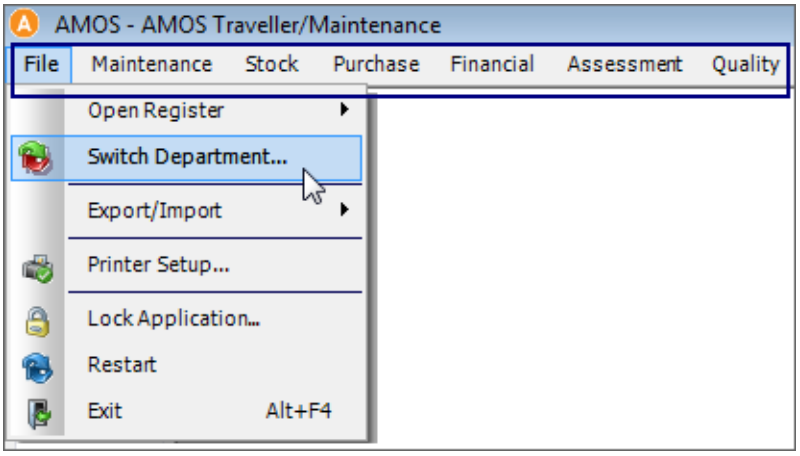
The List bar/Icon bar appears on the left hand side of the Dashboard and contains shortcuts to main areas of the application:



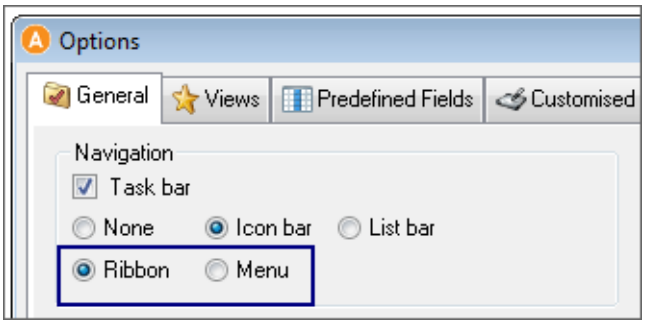
Once enabled, it is visible from any window.

Ribbon Bar or Menu

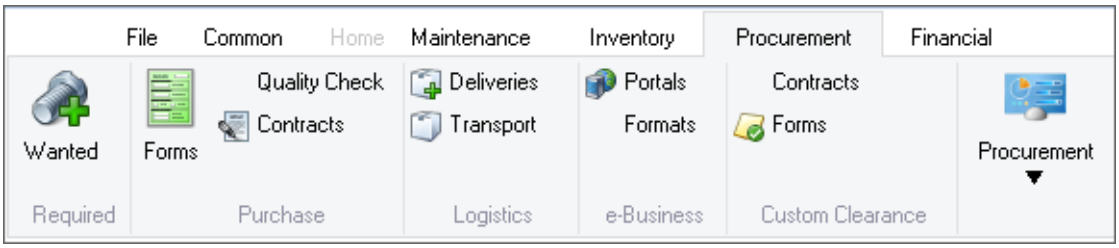
By default, navigation in AMOS is set to the standard menu bar:



You can choose in the Options window to display a ribbon bar instead:

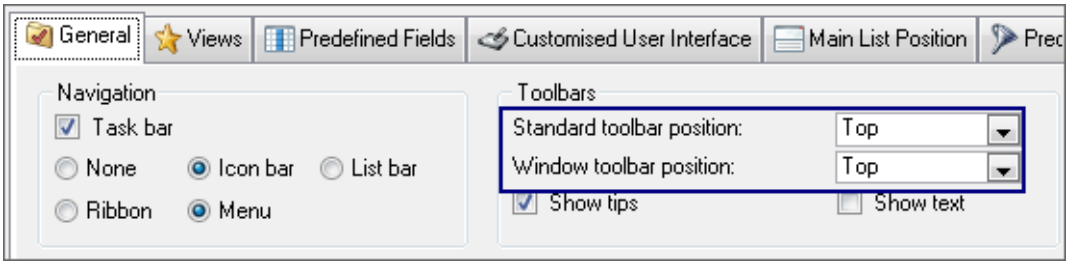


You'll see familiar menu labels like 'Maintenance', 'Quality' and so on, ranged across the top of the ribbon. On the ribbon, each one of these labels is a tab collecting groups of the traditional menu items inside:

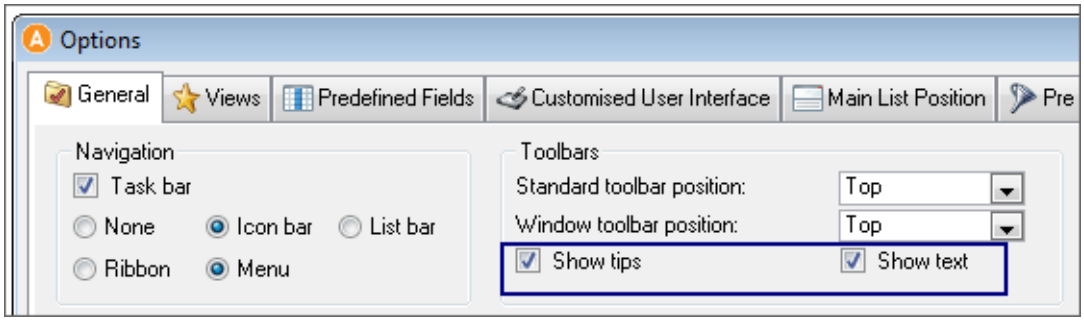


Toolbar Positioning

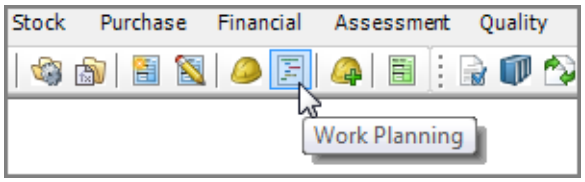
Set the position - top, bottom, left, right or hidden - for both the standard toolbar and the window toolbar:



Toolbar Tips and Text



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



Flag **Toolbar text** to turn on text underneath toolbar icons:

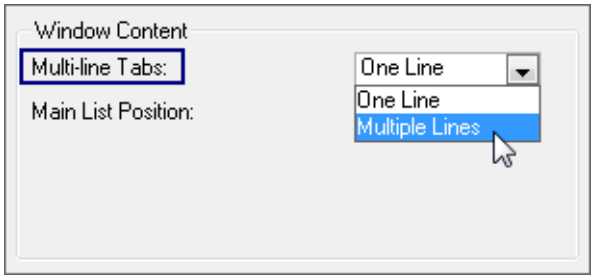


General Options

- Flag **Confirm on Exit** to make AMOS request confirmation prior to exiting.
- Flag **Warning on Filter Without Given Criteria** to make AMOS issue a warning message whenever you try to click **Filter** in any filter without entering search criteria.
- Select a **Windowing mode** to define whether windows open maximized by default, or cascaded by default.
- Set the number of seconds between checks for unacknowledged notifications/alert updates in the **Mailbox/Dashboard Check Interval (sec)** field. AMOS will check at the set interval and notify you if there are any notifications awaiting acknowledgement/updated alerts in the system.
- Set the number of minutes for which AMOS can be idle before it locks, in the **Idle Time Out (min)** field. Once the allotted time has passed, the windows will remain open but the logon dialog will appear and require you to enter your password.

Tab Appearance

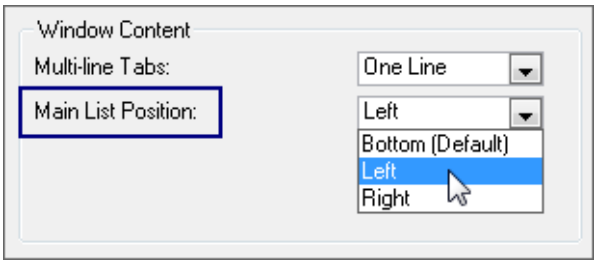
Choose whether window tabs should appear all in one line with arrows to scroll through the tabs that are outside the screen's edge, or stacked in multiple rows and all visible at once:



Main List Position

By default, the list of columns appears at the bottom of windows throughout the system. If you prefer, you can change the default position here by selecting another position from the **Main List Position** drop-

down on the General tab:



The default you set here will apply system-wide, but can be changed in any individual window by selecting **Main List Position > Bottom/Left/Right** from the **Edit** menu. AMOS will remember each user's own settings per window for the next time he/she logs in.

You'll see windows where you've changed the default on the Main List Position tab here, with **Scope** 'Private'. Note that you can't create any new configurations in the Main List Position tab - only view or remove existing ones.

Views

AMOS can save frequently used screen configurations, called Views. A view records which screens are open, which screen is active, which filter criteria are defined and the sorting order applied in the window. Each saved view can be restored as and when required.

Views are available for selection according to their 'scope':

- A **Private** view will only be accessible to the person who created it, the logged-in user.
- A **Group** view will be accessible to one or more user groups.
- A **System** view will be accessible system-wide to any logged-in user.

> **EXAMPLE**
>
> You frequently use the Purchase Forms window and would like to access it instantly with certain information present - only active forms of type Purchase Order. You filter the Purchase Forms window to show the content you want and sort it. Then you save the window as a View, with scope 'Private'. This view will be available to you the next time you start AMOS.

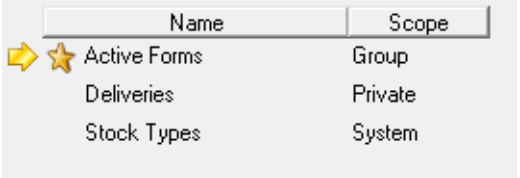
Setting a Default View

To set a default view for startup:

1. Go to **Tools > Options...** . Open the Views tab.
2. Select a view in the list.
3. Click **Set Default**[1].

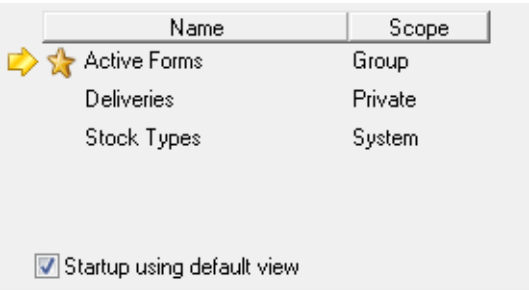
   

   The selected view is flagged with a star:

[1] Setting a default view to be used at startup depends on your access rights.

4. Check 'Startup using default view':



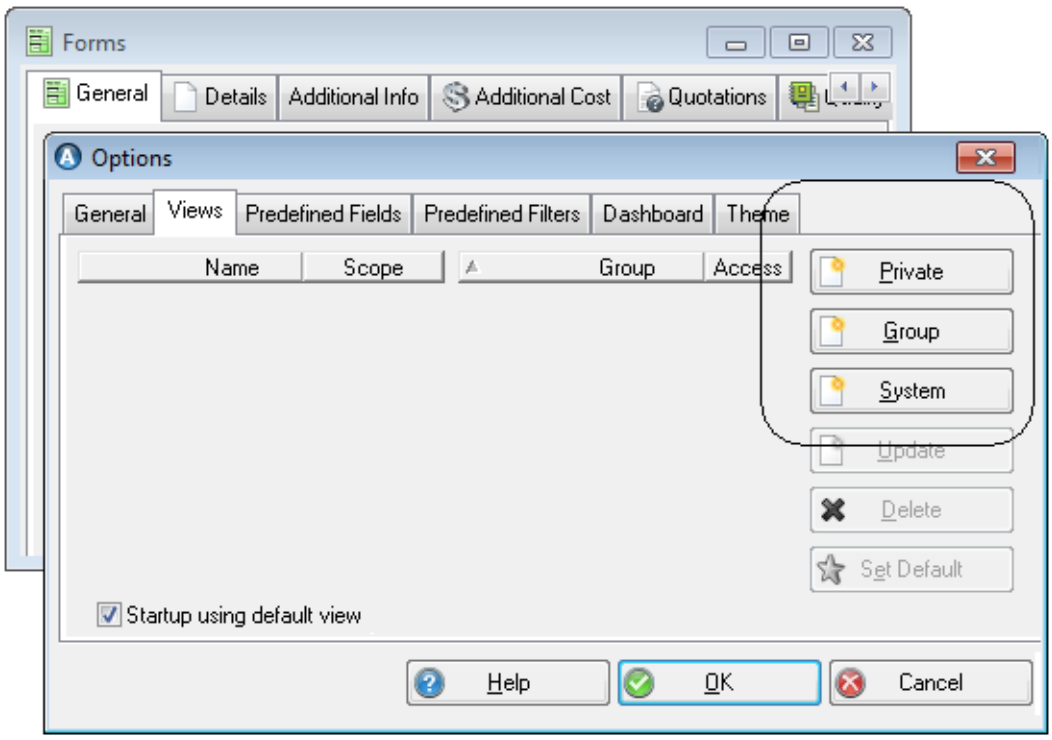
5. Click **OK** to exit the Options window.

At next startup AMOS will automatically open at the default view, according to its scope and the identity of the logging-in user.

Creating a New View

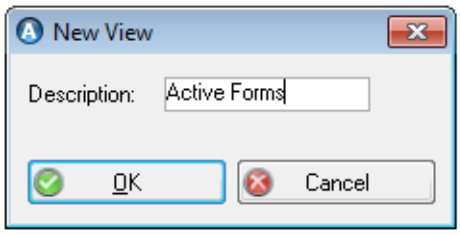
1. Open a window - for example Purchase Forms - and filter it to the content you want to see. Sort the content to your liking.
2. In the active window, go to **Tools > Options...** and open the Views tab.

   Or, click the button on the task bar to open the Options window directly to the Views tab.
3. Click one of the three buttons to define the view's scope[1] : **Private**, **Group** or **System** :

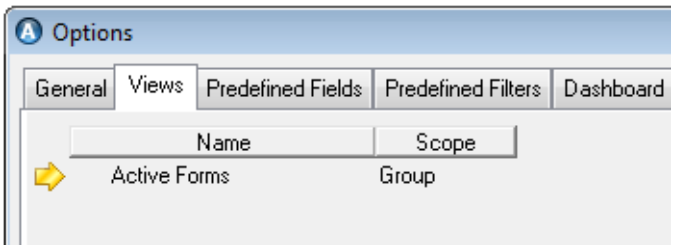


   The New View dialog opens:

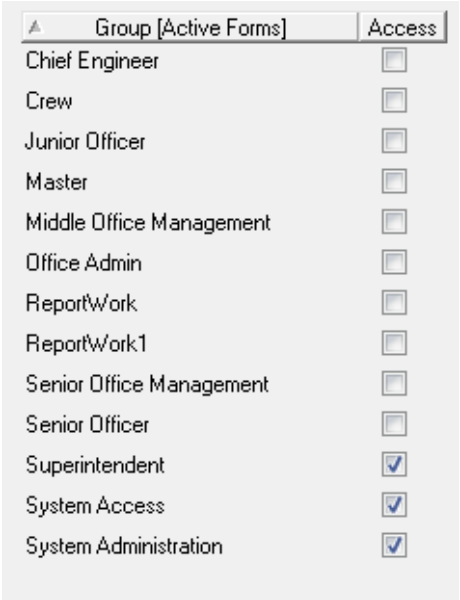
[1] The scope you are allowed to select for a new view depends on your access rights.



4. Give the view a name and click **OK**to return to the Views tab. The **Name** and **Scope** are shown on the left side of the tab:



5. If you created a Group view, flag the user groups[1] in the **Access** column to assign access to select this view:



6. Click **OK**. The next time AMOS is started up, the new view will be available for selection according to its scope and the identity of the logged-in user.

Updating a View

To update an existing view:

1. Open a window which already has a view defined, that you want to change.
2. Filter and sort the information to include your changes.
3. Go to **Tools > Options** and open the Views tab.
4. Select the view in the list. If it is a group view, you can add or remove groups by flagging and unflagging in the **Access** column.
5. Click **Update**[2].

[1]Your access rights determine if you are allowed to add or remove Groups from the Access list for Group views.

[2]Your access rights determine if you are allowed to update or delete views, and add or remove groups from the Access list.

6. Change the **Description** if needed and click **OK**.
7. Click **OK** to exit the Options window. The view is updated accordingly.

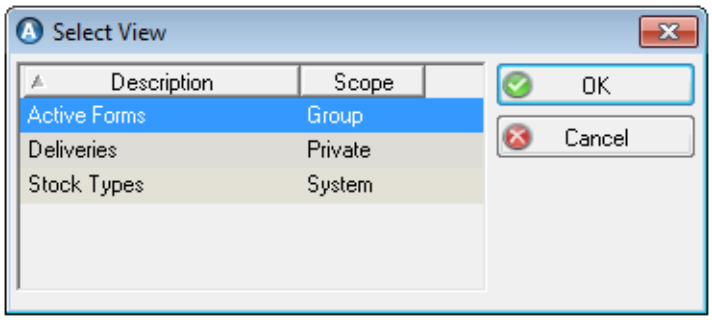
To remove a view from the list select it and click **Delete**.

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.

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

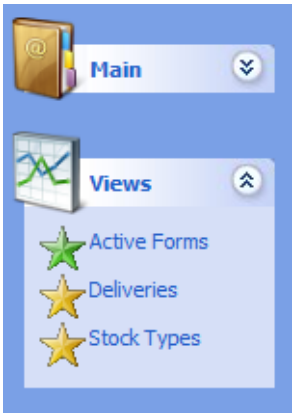
» Go to **Tools > Select View** or press the **F6** key. The Select View dialog opens:



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.

Predefined Fields

To save field selections created with the Field Chooser, create a predefined field configuration. The next time the relevant window is opened, AMOS will display or hide the fields according to the predefined field configuration.

Predefined field configurations will apply in the window(s) they are created for, according to their 'scope':

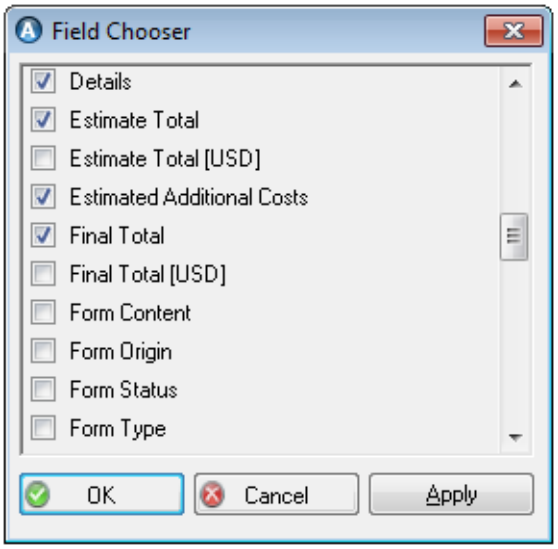
[1] If the list/icon bar is not visible, enable it in the Tools > Options > General tab by clicking the radio button for 'Icon bar' or 'List bar'.

- A **Private** configuration will only apply to the person who created it, the logged-in user.
- A **Group** configuration will apply to one or more user groups.
- A **System** configuration will apply system-wide to any logged-in user.

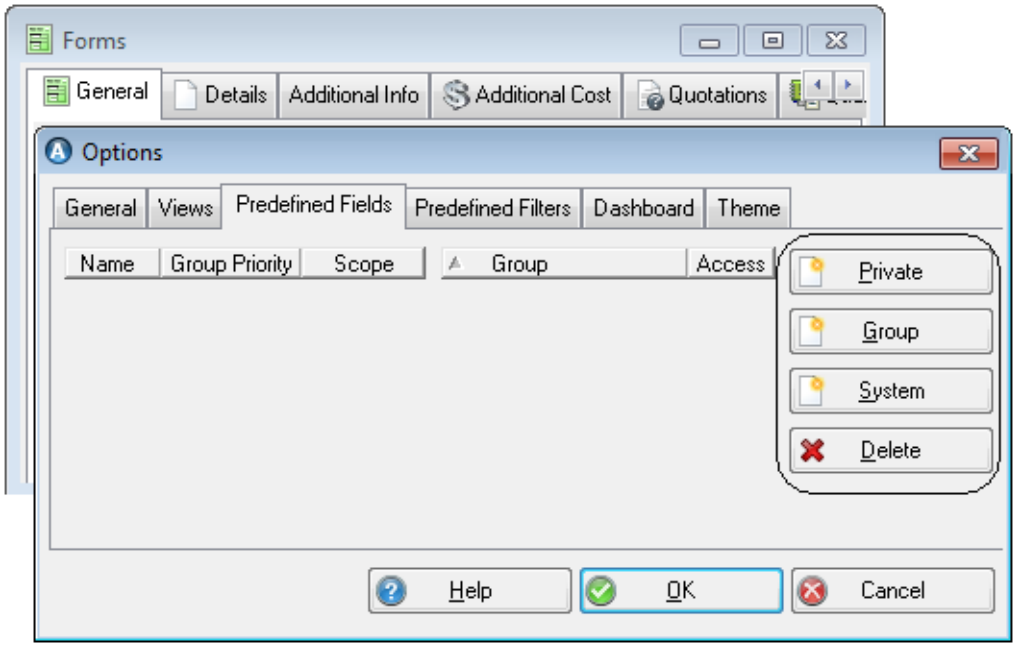
Predefined field configurations can conflict with each other: if there is a predefined field configuration on the Forms window for a user group, but one of the users in that group also has a private predefined field configuration for the Forms window, which of the two will that user see? In this case, configurations with private scope receive first priority; then those with scope set to group, and then system.

Configuring Predefined Fields

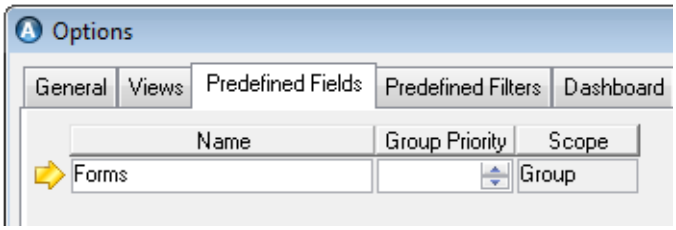
1. Open a window and right-click in the list part.
2. Select **Field Chooser**:



   Flag the fields you want to see in the list. Unflag any fields you want to hide from the list.
3. Click **OK** to return to the window and see the flagged fields in the list.
4. (Optional) Drag and drop the columns to rearrange the order they appear in.
5. From the active window, go to **Tools > Options...** and open the Predefined Fields tab:



Click one of the three buttons to define the configuration's scope[1] : **Private**, **Group** or **System**. The window **Name** and **Scope** are added to the left side of the tab:



6. If you created a Group predefined field configuration, flag the user groups[2] in the **Access** column to assign access to this configuration:

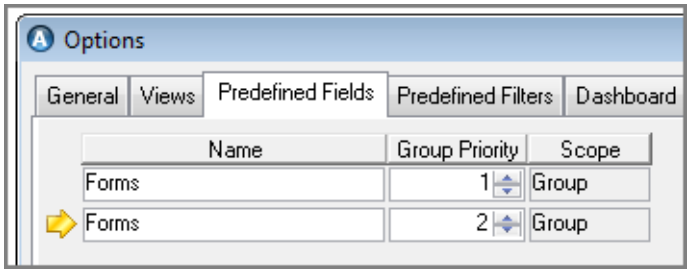


7. Click **OK**. The next time AMOS is started up the predefined field configuration will apply in the designated window, according to its scope and the identity of the logged-in user.

Group Priority on Predefined Fields

If a user belongs to more than one group and each group has access to a different predefined field configuration for the same window, which one does AMOS show to this user?

In this case AMOS will use the predefined field configuration with the highest **Group Priority**:



Configurations with private scope always receive first priority; then those with scope set to group - according to the group priority if any conflict exists. System scope configurations are given the lowest level of priority.

[1] The scope you are allowed to select for a predefined field configuration depends on your access rights.

[2] Your access rights determine if you are allowed to add or remove Groups from the Access list for Group predefined field configurations.

Predefined Filters

To customise default filter criteria to be populated automatically onto a selected filter, create a predefined filter configuration.

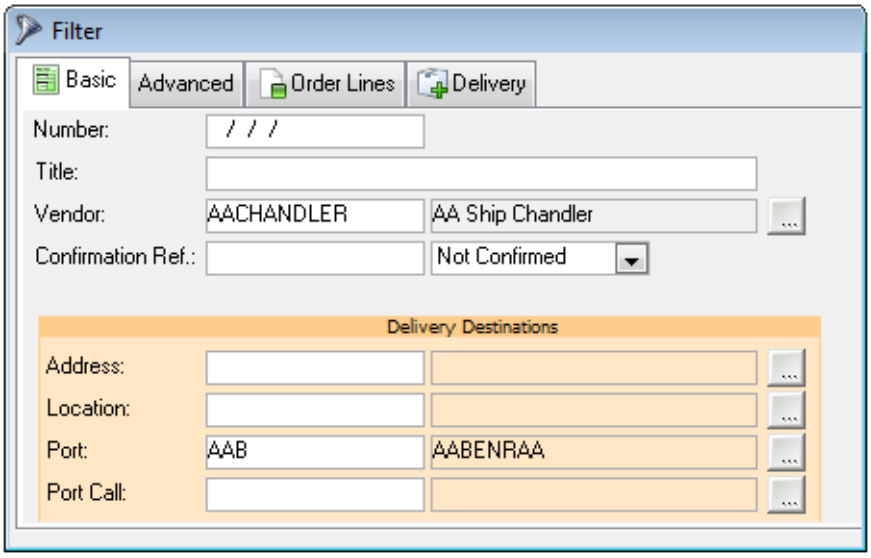
Predefined filter configurations will apply in the filter(s) they are created for, according to their 'scope':

- A **Private** configuration will only apply to the person who created it, the logged-in user.
- A **Group** configuration will apply to one or more user groups.
- A **System** configuration will apply system-wide to any logged-in user.

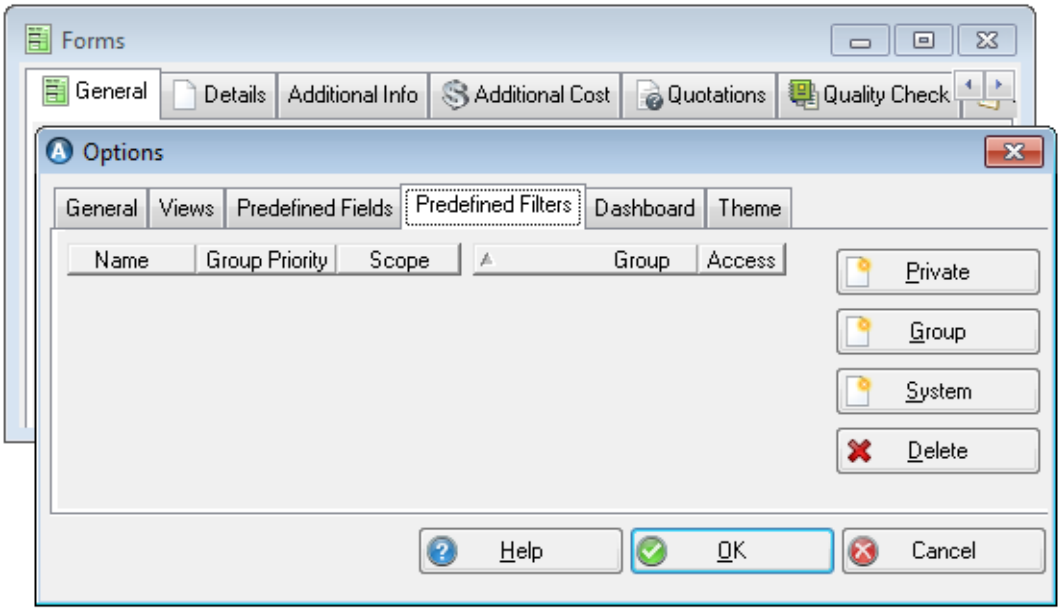
Predefined filter configurations can conflict with each other: if there is a predefined filter configuration on the Forms filter for a user group, but one of the users in that group also has a private predefined filter configuration for the Forms filter, which of the two will the user see? In this case, configurations with private scope receive first priority; then those with scope set to group, and then system.

Configuring Predefined Filters

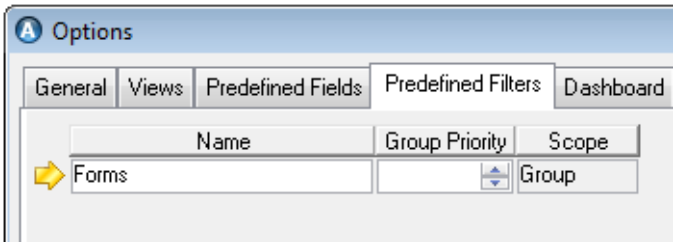
1. Open a filter, like **Purchase > Forms**.
2. Set the filter criteria as you wish to save it - for example: choose the **Vendor** to search on, **Confirmation**, **Port** , **Form State**, etc:



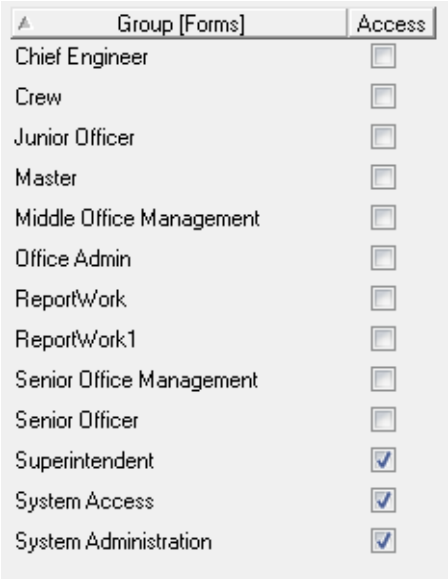
3. Click **OK** in the filter to open the window.
4. From the active window, go to **Tools > Options** and open the Predefined Filters tab:



5. Click one of the three buttons to define the configuration's scope[1] : **Private**, **Group** or **System**. The filter **Name** and **Scope** are added to the left side of the tab:



6. If you created a Group predefined filter configuration, flag the user groups[2] in the **Access** column to assign access to this configuration:



7. Click **OK**. The next time AMOS is started up the predefined filter configuration will apply in the designated window's filter, according to its scope and the identity of the logged-in user. A filter with

[1] The scope you are allowed to select for a predefined filter configuration depends on your access rights.

[2] Your access rights determine if you are allowed to add or remove Groups from the Access list for Group predefined field configurations.

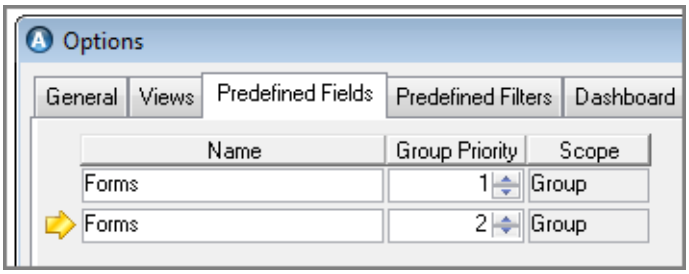
predefined content can be changed at any time, but will revert to the saved definition the next time it is opened.

Note: Predefined filters have limitations when content referenced in the filter is shared differently between departments. For example this includes but is not limited to work flow definitions which are not shared globally.

Group Priority on Predefined Filters

If a user belongs to more than one group and each group has access to a different predefined filter configuration for the same window, which one does AMOS show to this user?

In this case AMOS will use the predefined filter configuration with the highest **Group Priority**:



Configurations with private scope always receive first priority; then those with scope set to group - according to the group priority if any conflict exists. System scope configurations are given the lowest level of priority.

Customised User Interface

It's possible to use the Form Designer to modify the appearance of many (but not all) windows throughout AMOS: you can move and resize existing fields, change fonts and colours, set conditions, and so on.

EXAMPLE

You decide to customise the interface in the Forms window to hide the fields 'Ordered', 'Confirmed' and 'Received', *if the selected form* is not a Purchase Order.

You also want to make some changes to the Work Orders window: you want the on some fields to show up red, *if the selected work order* is overdue.

Certain windows or areas do not support this functionality: for example, the main list part of windows; hierarchies; the Quotation Compare window Compare tab; and Attachment tabs and Audit Trail Log tabs will not support modification. In other words: these kind of modifications are only supported on data presentation views which are directly placed on a tab page in a tab-list window.

The ability to modify window appearance makes your AMOS graphical user interface very flexible and it is important to control access. Anyone who will use this functionality to create and save new interface layouts needs **Execute** flagged on the Access Control window Functions tab for:

- *Define Private User Interface*
- *Define Group User Interface*
- *Define System User Interface*

To get started, open the Form Designer from the window you want to modify by selecting **Edit > User Interface**. AMOS will check if you're running with a theme enabled: if yes, you'll have to disable it (**Tools > Options >** Theme tab), and restart the system. When you're finished editing, you can re-enable the theme.

See "Designing Your Form" on page 289 about using the Form Designer window to make changes and modify the window you've selected.

When you've finished with your changes, **Save** it. You'll have the option to store your new window layout as a 'Private', 'Group', or 'System' configuration. By default, new configurations are named:

<window title>.<tab page text>.<Data object name>

Note: it's important to remember that you won't see any of your changes in the window or tab in question, until you've closed and reopened it.

You'll see new window layout configurations listed in the **Tools > Options >** Customised User Interface tab. You can't create any new configurations in this tab. You can:

- apply **Group Priority** and define **Access**, for those entries with **Scope** set to 'group'.

  See "Predefined Filters" on page 202 or "Predefined Fields" on page 199 for more about private, group and system scope.
- change the default name on an entry.
- delete entries.
- open and edit an entry in an instance of the Form Designer.

Dashboard User Options

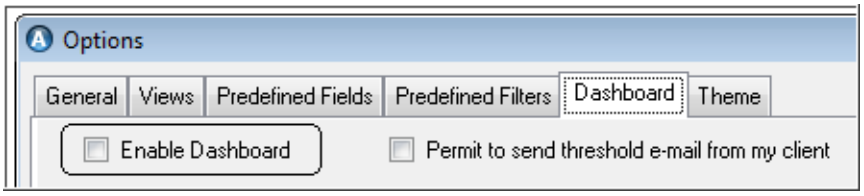
AMOS Business Suite opens to a customisable Home Page, or Dashboard. You can add convenient information to the dashboard like alerts and work flow notifications. Settings apply to the currently logged in user only.

Tip

If you aren't using workflow notifications, you can hide the Notifications section on your Dashboard and use the extra space instead to expand the Alerts Overview. Switch the notifications section on and off by flagging/unflagging the 'Show Workflow Notification' checkbox on the Dashboard tab.

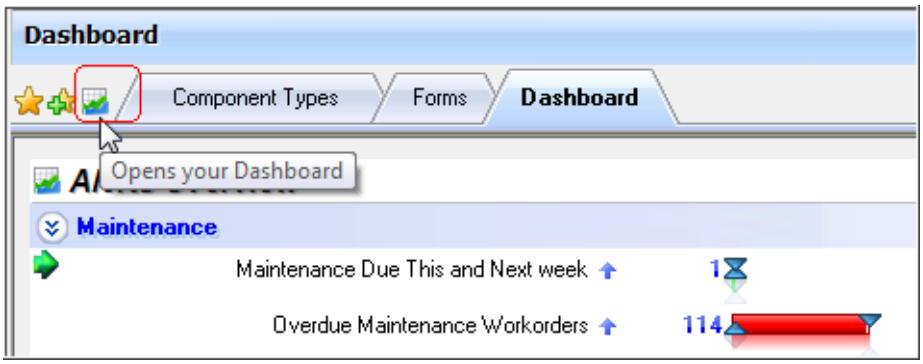
To switch the dashboard on and off:

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



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

When the task bar is enabled you will see a dashboard icon/tab on the task bar:



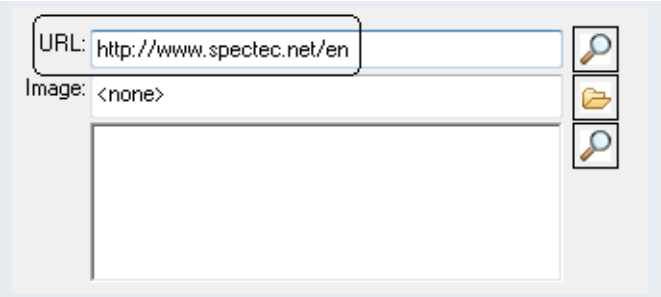
When other windows are open, clicking the dashboard icon/tab on the task bar returns the dashboard to the front of your screen, leaving the other windows open underneath.

Webpages and Images on the Dashboard

You can display a webpage or an image like your logo, on your dashboard.

Showing a Webpage

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:

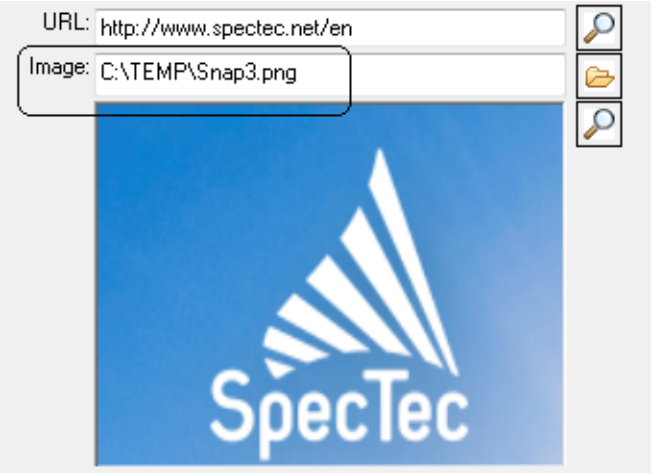
move the webpage to the right side lengthwise, or

back to the bottom.

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

Adding an Image

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



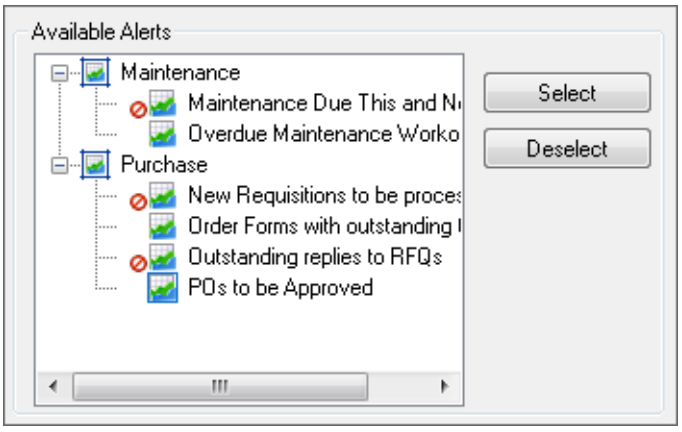
3. Click **OK** to exit the dialog. The image will appear in the top left corner of the dashboard when you are the logged in user. Remove the image at any time by clearing the **Image** field.

Enabling Alerts on Your Dashboard

The Options window Dashboard tab contains a list of the defined alerts[1] that are currently available in the system. Some mandatory alert groups may be set to appear on your dashboard automatically whether you select or deselect them in the Options window.

To display a defined alert on your dashboard:

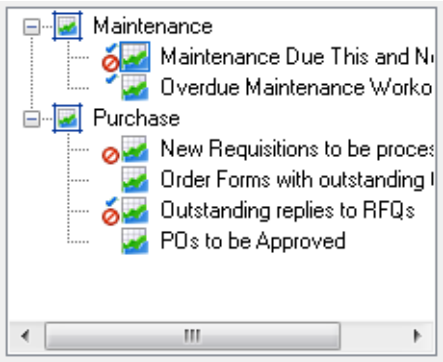
1. Go to **Tools > Options.** Open the Dashboard tab.
2. If the dashboard is not already enabled, flag the **Enable Dashboard** checkbox.
3. Expand the **Available Alerts** list:



An alert with a red icon next to it is inactive.

[1] Alerts will only appear in the list if your user group has Read access assigned to them.

4. To select an entire group of alerts, click on the root and click the **Select** button. Otherwise, click on a single alert and click **Select**:



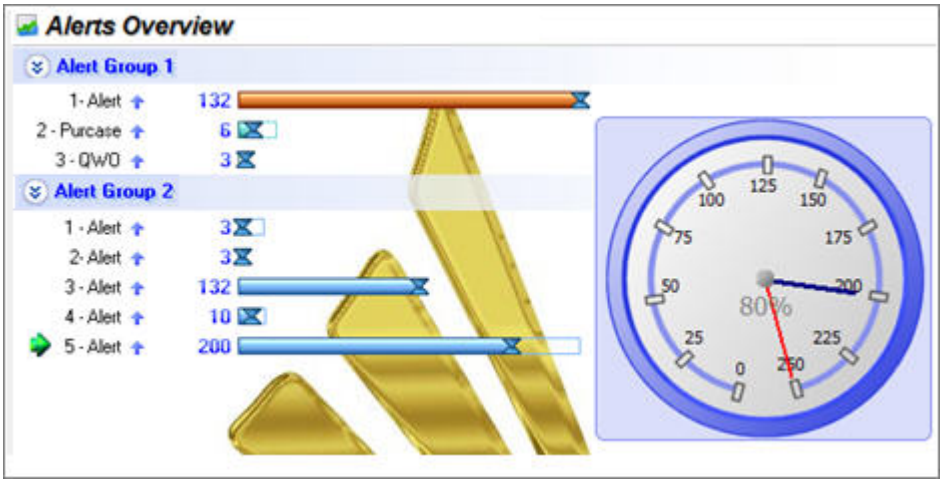
> **Note:** both 'active' and 'inactive' alerts are available for selection. If you select an inactive alert, it will not actually show up on the dashboard as long as it is inactive. To reactivate an alert open the Alert Configuration window, select the alert and flag the **Active** checkbox.

5. A small blue check appears next to any selected alert (including inactive ones); to remove an alert click on it and click the **Deselect** button.
6. Click **OK** in the Options window. The next time you start AMOS, the alerts you selected will appear on your dashboard.

Alert Gauges

It is also possible to display a gauge alongside the alert bars, with numbers on a dial visualising the alert values. This gauge is switched on or off in the Options window Dashboard tab:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Enable the alert gauge by checking the **Show Alert Gauge** checkbox.
4. **Click OK** to close the dialog.
5. A gauge with a blue and a red indicator will appear on your dashboard.

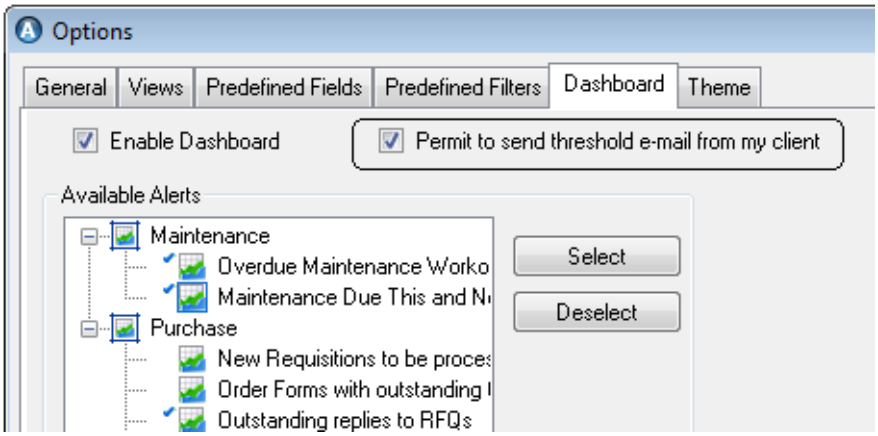


The blue indicator represents the value of the currently selected alert. The red indicator represents the threshold value of the currently selected alert.

Sending Threshold Notifications

Dashboard alert definitions may include a threshold, and an email notification to be sent if the threshold is crossed:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Flag the **Permit to send threshold email from my client** checkbox:



4. Click **OK**.

If a threshold is crossed emails will be sent to the users selected on the alert's threshold definition. Before sending an email AMOS will check if a mail for this alert has already been sent from another logged in user with an active dashboard displaying the same alert.

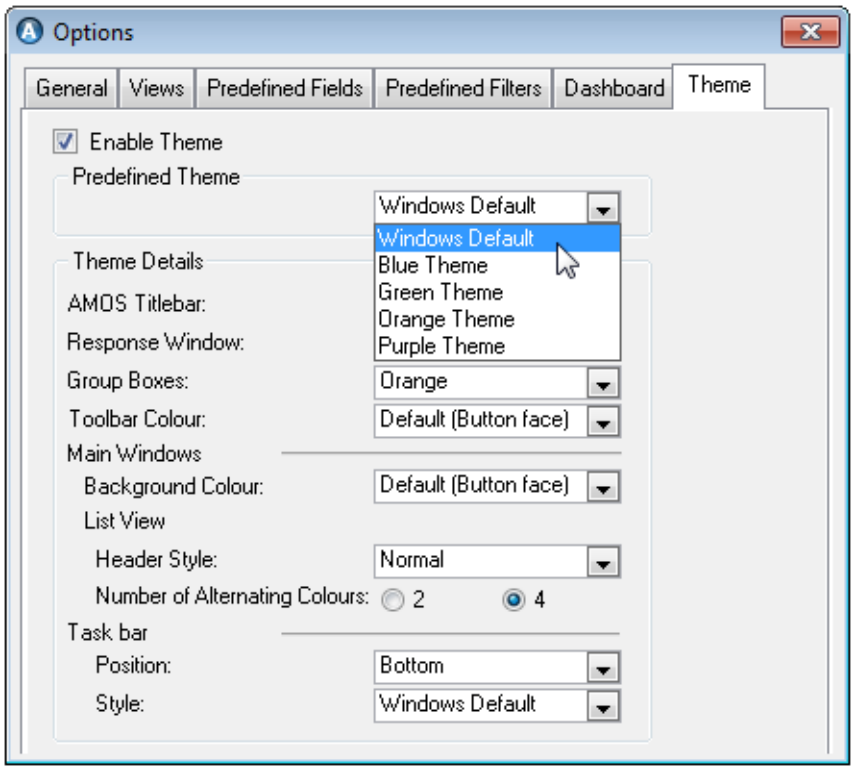
The threshold and the email notification must already be defined on the alert itself for this setting to take effect. See "Alert Threshold Definition and Notifications" on page 215.

Themes

Tailor the appearance of certain aspects of AMOS using predefined or customised themes. Settings apply to the currently logged in user only.

Selecting a Theme

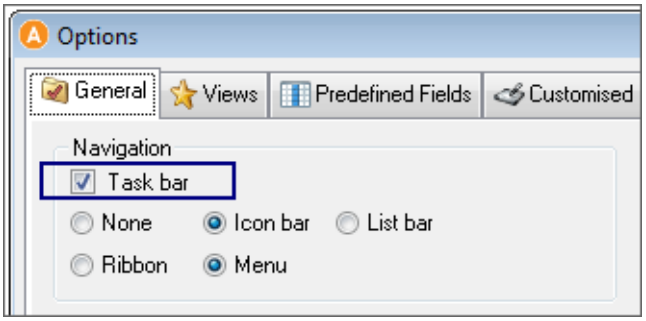
1. Go to **Tools > Options**. Open the Theme tab.
2. Flag **Enable Theme** and select one from the **Predefined Theme** list:



3. Set your own customisations in terms of colour and style in the Theme Details area of the dialog.
4. Click **OK**. You may need to restart AMOS to see your settings take effect.

Setting the Task Bar Appearance

If the **Task bar** option is flagged on the Options window General tab:

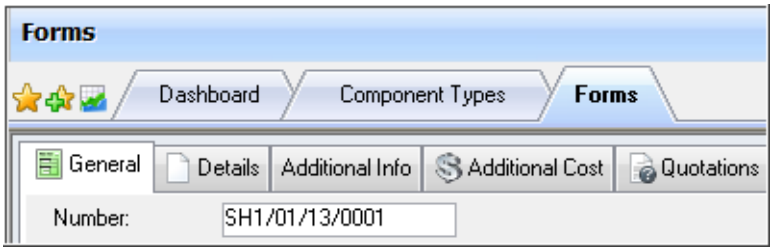


You can configure its appearance and position:

1. Open the Theme tab and select a **Position** and **Style** for the task bar:



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



Dashboard Alerts

When AMOS Business Suite is started up the application opens to the customisable homepage, or Dashboard. What each user sees on their Dashboard will vary according to their own settings, and alterations to their data.

To configure dashboard alerts:

1. Define alert groups. See "Defining Alert Groups" below.
2. Define the alerts that will be available in the system. See "Defining a New Alert" on the next page.

   (Optional) Specify a threshold - the highest acceptable value an alert can reach. See "Alert Threshold Definition and Notifications" on page 215.
3. Each user can select and enable the alerts displayed in his or her Alerts Overview[1] . See "Enabling Alerts on Your Dashboard" on page 216.

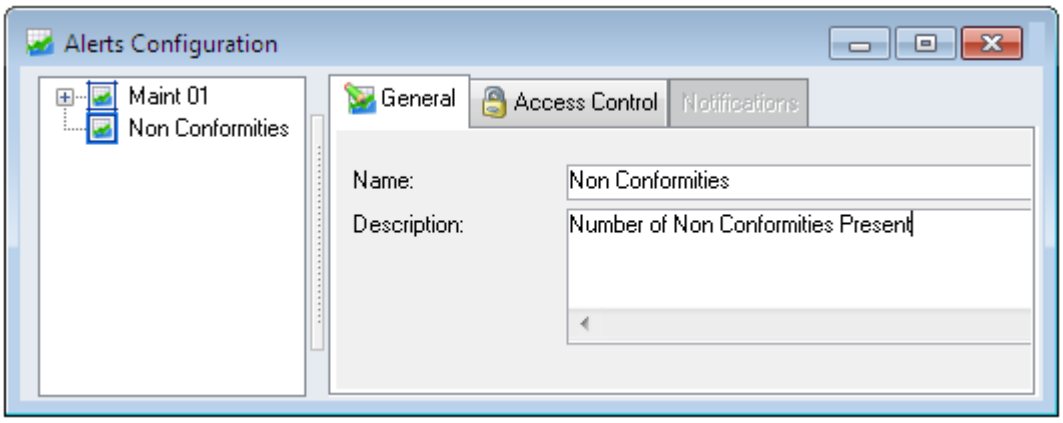
Note: The setting of the system parameter 'Use Separate Retrieval Thread' adjusts the view of the dashboard alerts. If set to TRUE, a user can continue to work without being interrupted by dashboard operations. In this case indicators on the dashboard will inform the user which alert is currently being processed and although the values will be updated immediately for each alert, the alerts bar and pie charts will be updated when all alerts have been processed.

Defining Alert Groups

To define an alert group:

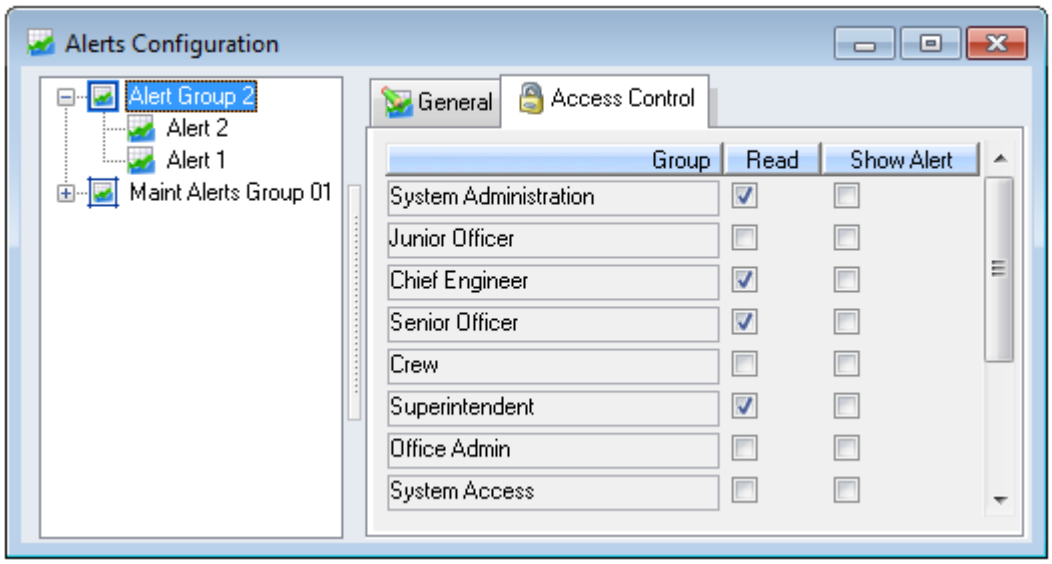
1. Go to **Tools > Configuration > Dashboard Alerts**.

   You will create a hierarchy of alerts on the left hand side of the window.
2. Click the **New** button on the toolbar and then click **Yes** in the dialog to add a new group icon.
3. Select the new Alert Group. You can change its name in the **Name** field if you want. The text you enter in the **Description** field will appear in a tooltip when the cursor hovers over the Group name in the Alerts Overview on the Dashboard.



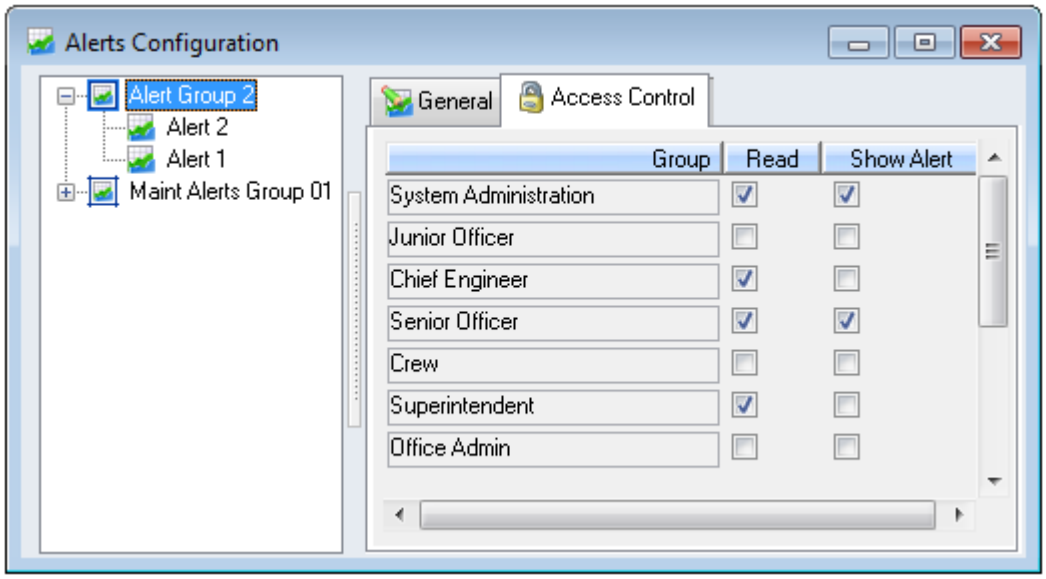
4. Open the Access Control tab. Check the boxes according to who should have **Read** access to the alerts in the selected group. Users in User Groups with Read checked will now be able to choose these Alerts in the Options window, to display on their Dashboards:

[1] It is possible to set an alert group to always appear on the dashboard whether the user selects those alerts for his Alerts Overview or not. See "Defining Alert Groups" below.



Users in groups without Read checked will not see these alerts listed in the Options window.

5. You may want to make an alert group appear automatically on the dashboard for certain user groups. To do so, check the **Show Alert** box next to Read for those user groups. These alerts will now appear on the dashboard for all users in the relevant group(s), whether the user chooses the alert for display or not:



If you uncheck Read, Show Alert will be unchecked automatically too.

6. **Save** the Alert Group.

Defining a New Alert

To create new dashboard alerts:

1. Select an alert group and click the **New** button on the toolbar. Click **No** in the dialog that appears.
2. An **Alert** icon will appear. Enter a **Name** for it.
3. The text you enter in the **Description** field will show in the tooltip when the user hovers over the alert on the dashboard.

   New alerts are flagged **Active** by default. If you deactivate an alert it will still be available for selection on user dashboards, but it will not actually show up as long as it is inactive.

4. Click the button beside the **Graph Bar Color** field and then use the RGB colour model to define the colours which the alert bars should appear in on the dashboard.

   Note: To define if the length of the bar should be affected by the alerts with the highest value amongst all alerts, or amongst the same group, set the parameter 'Alerts Maximum Size'. See "Dashboard Parameters " on page 113.

5. Use the **Designated Window** drop-down list to select the window to be opened automatically when a user double-clicks on this alert on the dashboard. This field is only available if you flag the checkbox **Row count defines the alert value**.

   If you uncheck this box the alert displays in the same way, but its value is based on a calculation and so there is no window to open by clicking the alert on the dashboard.

6. In the **SQL Syntax** section, define an expression. This can be done manually or automatically.

   See "Automatic Alert Definition" on the next page and "Manual Alert Definition" below for instructions and examples.

7. **Save** the new alert.

Manual Alert Definition

Note: The system will modify the SQL expression you define, to retrieve the number of rows and not the complete data you specify. This reduces the returned rows for speed and network traffic improvement. However, a user can get an indication of what SQL is really performed, by pressing the SHIFT key and moving the cursor over the alert in the Dashboard -a tooltip with the modified SQL will appear.

Use the following syntax: SELECT COUNT(expression)FROM tables WHERE predicates;

For example: 'Display the number of overdue Maintenance Work Orders which are Issued:'

```
SELECT COUNT (workorder.workorderid) FROM WorkOrder WHERE
( DueDate < getdate() ) AND ( WOStatus in (6) )
```

You can add comments into the SQL statement by placing // in front of your comment.

Your SQL may contain these constants:

- :AMOS_CurrentDeptID - Identify the current department
- :AMOS_UserID - Identify the current user

This Alert example will display overdue work orders for a particular department. Double-click the alert while in the correct department, and the work order window will open displaying the relevant work orders.

```
SELECT Workorder.WorkorderID
FROM Workorder
WHERE Workorder.DeptID = 2000003
AND Workorder.duedate < today()
AND Workorder.wostatus NOT IN (7,8,4)
// 7 = Completed
// 8 = Controlled
// 4 = Cancelled
```

With the 'Designator Window' = 'Maintenance'

2000003 = Current department

This Alert example will display the overdue work orders for all departments.

```
SELECT Installation.InstCode || '/' || Department.DeptCode, Workorder.WONo,
Workorder.Title, Workorder.Priority
```

```
FROM Workorder, Installation, Department
WHERE Department.DeptID = Workorder.DeptID
AND Department.InstID = Installation.InstID
AND Workorder.duedate < today()
AND Workorder.wostatus NOT IN (7,8,4)
ORDER BY Department.DeptID ASC
```

With the 'Designator window' = (None)

> **Note:** It's required to use an apostrophe (not a single quote) within || '/' ||.

This Alert example displays the order forms.

```
SELECT Installation.InstCode || '/' || Department.DeptCode, Order-
Form.FormNo, OrderForm.FormType, OrderForm.FormStatus, OrderForm.Title
FROM OrderForm, Installation, Department
WHERE Department.DeptID = OrderForm.DeptID
AND Department.InstID = Installation.InstID
order by Department.DeptID asc
```

With the 'Designator Window' = (None)

> **Note:** It's required to use an apostrophe (not a single quote) within || '/' ||.

This Alert example will display overdue work orders for the current department. Double-click the alert from within the correct department, and the work order window will open displaying the relevant work orders.

```
SELECT Workorder.WorkorderID
FROM Workorder
WHERE Workorder.DeptID = :AMOS_CurrentDeptID
AND Workorder.duedate < today()
AND Workorder.wostatus NOT IN (7,8,4)
// 7 = Completed
// 8 = Controlled
// 4 = Cancelled
```

With the 'Designator Window' = 'Maintenance'

Automatic Alert Definition

If you are not familiar with AMOS table structures and SQL commands, you can use filters and drag and drop to provide the information AMOS needs to make the SQL statement for you.

> **EXAMPLE**
>
> You want to create an alert that informs the user how many overdue work orders are present in the system.

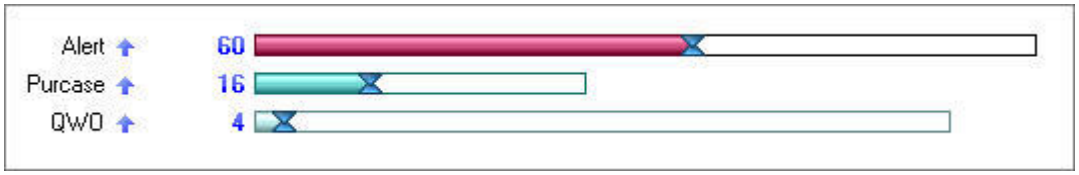
To create this expression automatically:

1. Open the Alerts Configuration window.
2. Leave it open, and open the **Maintenance > Work Orders** filter.
3. Set the filter criteria to return only overdue work orders and click **OK**.
4. When the Work Orders window opens, it will display a list of overdue work orders only.
5. Click anywhere inside this list and drag the mouse into the **SQL Syntax** box on the Alerts Configuration window.
6. AMOS will take this information and convert it to an SQL statement for the alert, defining that the user alert will track overdue work orders.

The resulting SQL statement is dynamic, meaning that it varies with your data. So, if there were only 20 overdue work orders in the system at the time you defined the alert but later on the number increases to 30 - the alert will reflect this change. Note that dragging and dropping from the Stock Wanted window is not supported.

Alert Threshold Definition and Notifications

You can specify a threshold on any defined alert - the highest acceptable value the alert can reach, for example the maximum number of overdue work orders that will be allowed. If this threshold is reached, the Alert's label on the dashboard will change to red and the alert bar will change colour to the one set in the **Threshold Colour** field.



AMOS can also send an email to the responsible user address(es) as defined on the alert, along with the predefined subject and text.

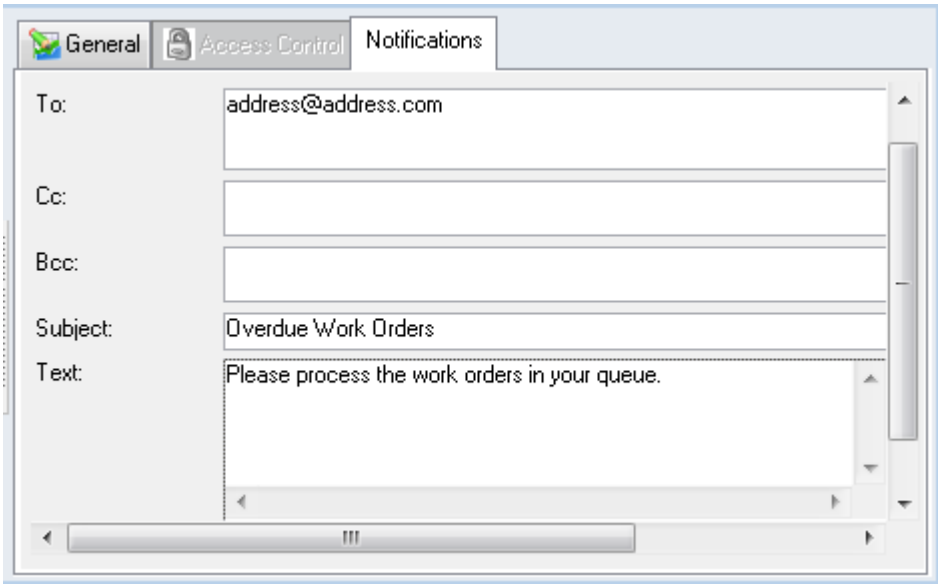
Setting a Threshold

1. Select the correct alert on the left side of the window.
2. Click the button beside the **Threshold Colour** field and then use the RGB colour model to define the colours the alert bar will change to on the Dashboard display, when the threshold is crossed.
3. Define an expression in the **Threshold SQL Syntax** area. You can use drag and drop to easily provide the information AMOS needs to make the SQL statement for you.
4. **Save** the Threshold.

Sending Email When a Threshold is Crossed

To enable AMOS to send automatic email notifications when this threshold is crossed:

1. Select the correct alert. You cannot define an email notification on an Alert Group. Open the Notifications tab.



   Only one email configuration can be defined per alert.

2. Using **To**, **Cc** and **Bcc**, insert a string of addresses separated by semi-colons. AMOS will not verify these addresses.

3. Enter a pre-defined **Subject** and **Text**.

   Subject: Overdue Work Orders.

   Text: 'Please process the work orders in your queue. The number of overdue work orders is above the acceptable limit'.

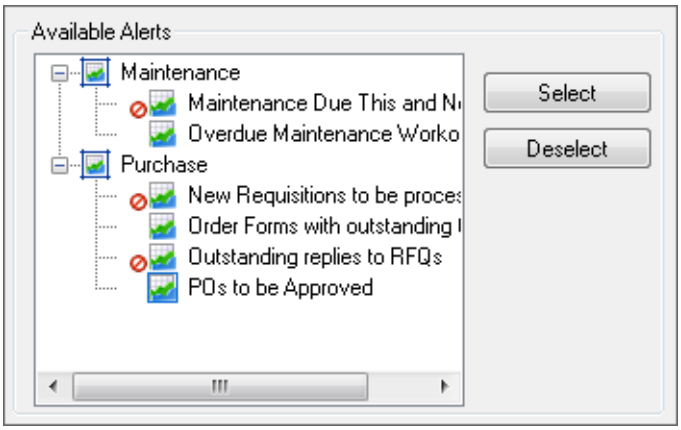
4. **Save** the pre-defined mail. Individual users must enable the mail to be sent from their client. See "Sending Threshold Notifications" on the facing page.

Enabling Alerts on Your Dashboard

The Options window Dashboard tab contains a list of the defined alerts[1] that are currently available in the system. Some mandatory alert groups may be set to appear on your dashboard automatically whether you select or deselect them in the Options window.

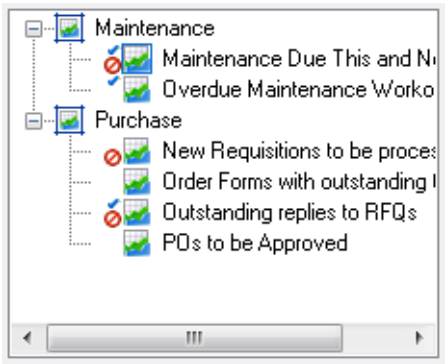
To display a defined alert on your dashboard:

1. Go to **Tools > Options.** Open the Dashboard tab.
2. If the dashboard is not already enabled, flag the **Enable Dashboard** checkbox.
3. Expand the **Available Alerts** list:



   An alert with a red icon next to it is inactive.

4. To select an entire group of alerts, click on the root and click the **Select** button. Otherwise, click on a single alert and click **Select**:



> **Note:** both 'active' and 'inactive' alerts are available for selection. If you select an inactive alert, it will not actually show up on the dashboard as long as it is inactive. To reactivate an alert open the Alert Configuration window, select the alert and flag the **Active** checkbox.

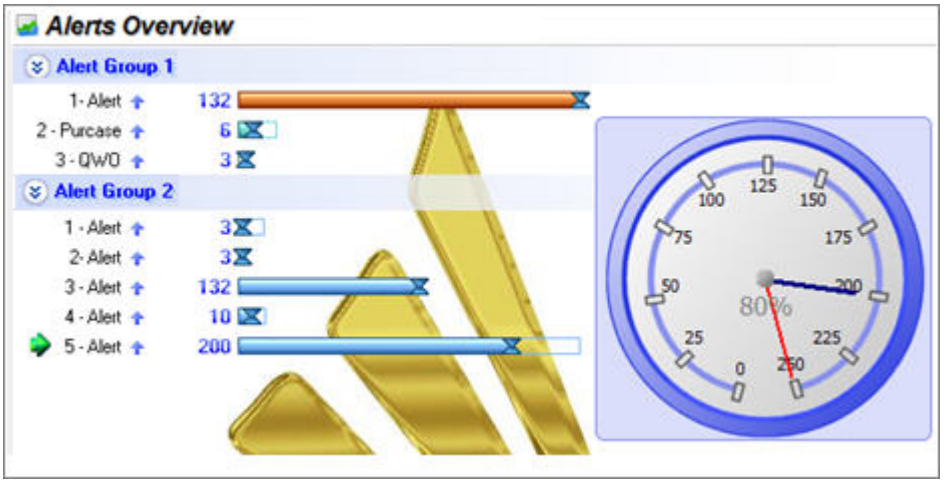
[1] Alerts will only appear in the list if your user group has Read access assigned to them.

5. A small blue check appears next to any selected alert (including inactive ones); to remove an alert click on it and click the **Deselect** button.
6. Click **OK** in the Options window. The next time you start AMOS, the alerts you selected will appear on your dashboard.

Alert Gauges

It is also possible to display a gauge alongside the alert bars, with numbers on a dial visualising the alert values. This gauge is switched on or off in the Options window Dashboard tab:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Enable the alert gauge by checking the **Show Alert Gauge** checkbox.
4. **Click OK** to close the dialog.
5. A gauge with a blue and a red indicator will appear on your dashboard.

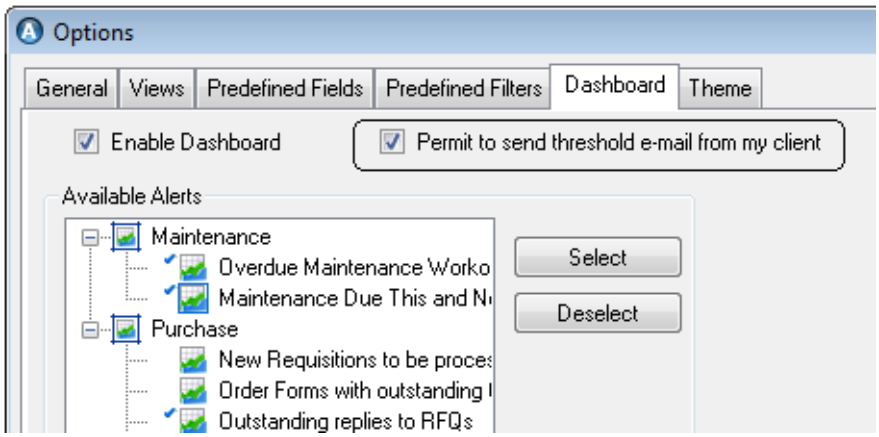


The blue indicator represents the value of the currently selected alert. The red indicator represents the threshold value of the currently selected alert.

Sending Threshold Notifications

Dashboard alert definitions may include a threshold, and an email notification to be sent if the threshold is crossed:

1. Go to **Tools > Options**.
2. Open the Dashboard tab.
3. Flag the **Permit to send threshold email from my client** checkbox:



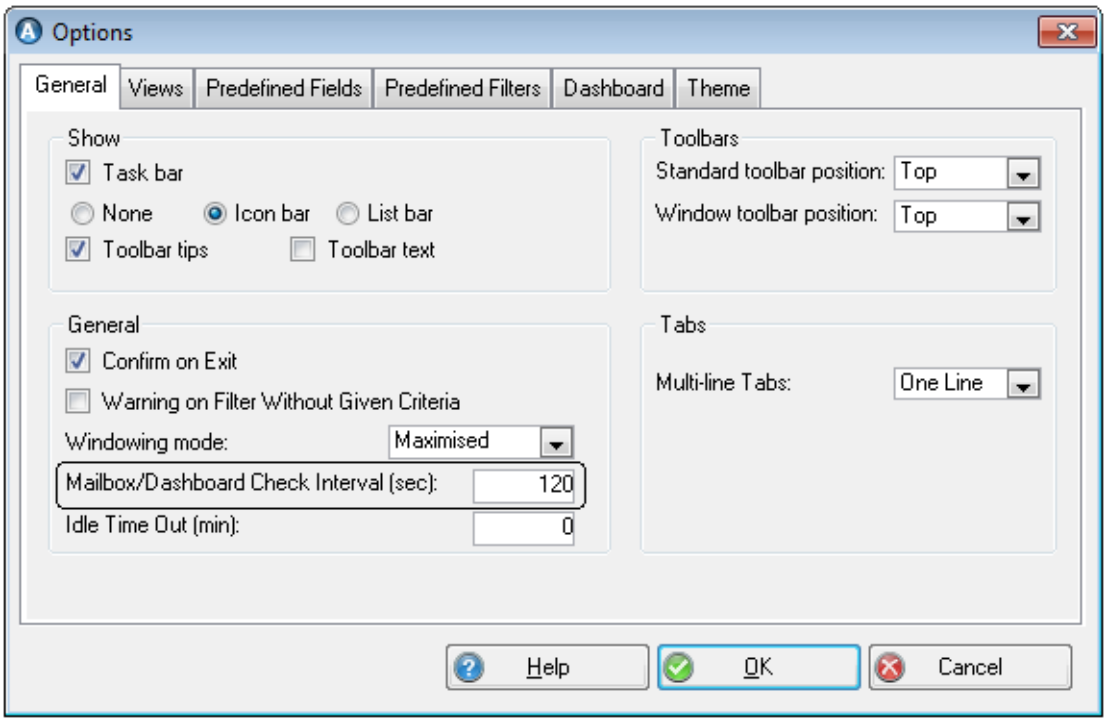
4. Click **OK**.

If a threshold is crossed emails will be sent to the users selected on the alert's threshold definition. Before sending an email AMOS will check if a mail for this alert has already been sent from another logged in user with an active dashboard displaying the same alert.

The threshold and the email notification must already be defined on the alert itself for this setting to take effect. See "Alert Threshold Definition and Notifications" on page 215.

Refreshing Dashboard Alerts

To get AMOS to refresh your dashboard alerts at a set interval, go to **Tools > Options** and enter a value in seconds, in the **Mailbox/Dashboard Check Interval (sec)** field:



Even if you leave the check interval set to 0 (off), AMOS will still automatically refresh dashboard alerts at login and upon switching departments. To prevent this automatic refreshing at startup, department switch and at any timed refresh interval, set the 'Manual Refresh Only'[1] system parameter to TRUE.

Separate Retrieval Thread and the Service Application

To make sure that you (the current user) can continue to work in AMOS without interruption by dashboard operations, set the system parameter 'Use Separate Retrieval Thread'[2] to TRUE. Then, the system will perform the dashboard alerts calculation and data retrieval in a separate thread, enabling you to continue working.

Setting the parameter to True[3] activates a service application, which will run and manage all dashboard related database access separately and revert back to AMOS with the results. AMOS will run the application automatically as needed and when it's running, a blue gauge icon will appear in your system tray:

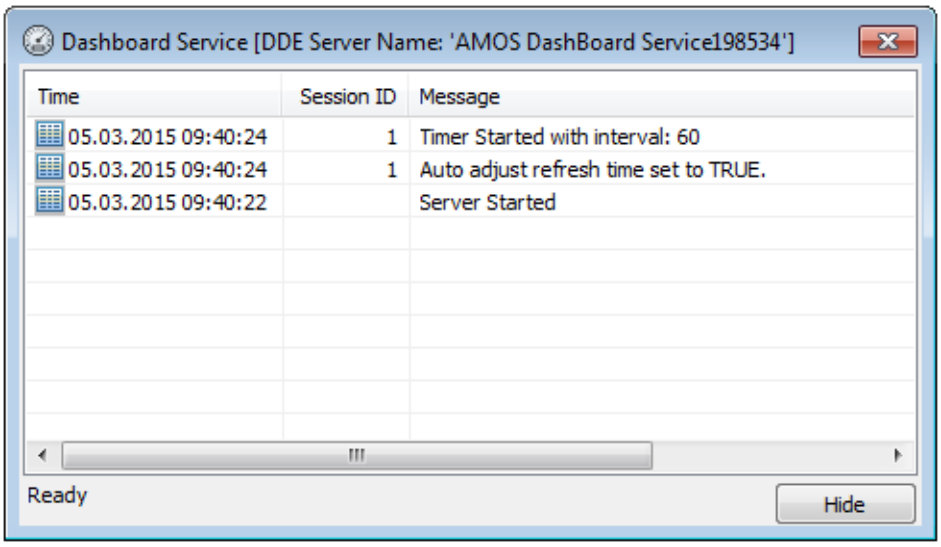


When the application is processing an SQL alert refresh action the icon will change to red. Double-clicking or right-clicking on the icon and selecting **Restore Window** opens the application's main window showing a list of events:

[1] Tools > Configuration > Parameters > Options > General > Dashboard >

[2] Tools > Configuration > Parameters > Options > General > Dashboard >

[3] The service application only runs when activated by the parameter setting and enabling the dashboard for use in the Options window.



The application will repeat the SQL commands and refresh itself automatically according to the **Mailbox/Dashboard Check Interval (sec)** setting on the Options window or every 60 seconds if you don't supply a value there.

If you set the parameter 'Manual Refresh Only'[1] to FALSE, the application will send a notification to AMOS to refresh the dashboard alerts. As the system updates the dashboard alert values, you may experience a time delay similar to the number of seconds set on the check interval. The service application will close itself if you close the dashboard.

Retrieving Data From Outside AMOS: External Alerts

Dashboard alerts collect their data from inside your AMOS database. However, the expression you use to define the alert value can also come from a power script global function. This means that you can retrieve data not only from inside AMOS, but also from external sources.

> **EXAMPLE**
>
> You want to display stock market values on your dashboard, or the number of incoming/outgoing portal files, etc. Such alerts can remotely access the relevant window and open it, even when the window or application is outside of AMOS.

To define external alerts, instead of inserting SQL syntax in the Alerts Configuration window you insert a function definition. The name of this function must begin with 'f_alert' - for example, 'f_alert_my_function'. The name must also be unique and distince from any functions internal to AMOS. When used, the **Designated Window** column should be disabled.

This function requires two arguments as per the table below:

Name	Type	Value	Meaning
QueryValue	Integer	0	Return alert value
		1	Perform drill down action
Alert ID	Decimal {0}	<any value>	Primary key of the alert

The function must return a long value as per the table below:

[1] Tools > Configuration > Parameters > Options > General > Dashboard >

Query Value	Return Value	Meaning
1	-1	An error occurred
	0	Function performed no operation
	1	Function performed action in response to drill down action. Possibly opens a window listing a report of the values behind the alert.
0	-1	An error occurred
	0	Alert has value 0
	>0	Alert has value >0

When the dashboard calculates the value of an external alert, the function executes and the result is displayed on the dashboard. When a user double-clicks the alert to drill-down, the function is called and subsequently performs the drill-down action.

Overview Panels

AMOS Overview Panels give users a quick status summary in different areas of AMOS.

EXAMPLE

You design an overview panel to display overdue maintenance work in several different ways, all in one place, using:

- gauges to show the total percentage of overdue work and the number of work orders due in the next 30 days;
- ratios showing the amount of unplanned work vrs. planned work, planned work vrs. total work due, etc;
- graphs to show the amount of overdue work by maintenance cause and overdue work by installation.

These gauges, graphs and ratios together comprise one Overview Panel.

To open an overview panel:

1. Go to **Tools > Overview Panels**. The Overview Panel select dialog opens, listing all configured panels available according to your access.
2. Click the panel you want to see, and click **OK**.
3. The panel opens showing current status information about the area of the system it applies to. You can't make any changes to the values in this window.

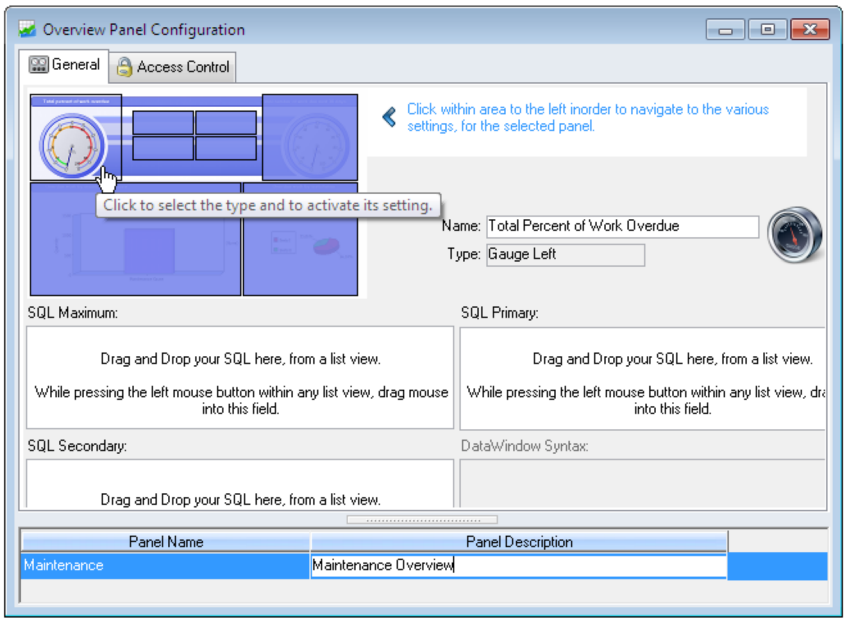
See "Configuring Overview Panels" below for more about setting up overview panels in your system.

Configuring Overview Panels

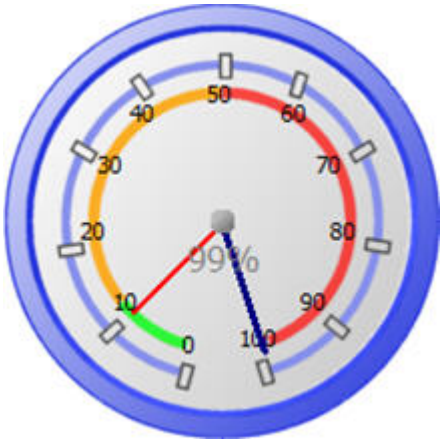
The presentation of the gauges, graphs and ratios in the panels on overview panels is fixed but the value and value definitions are configurable. The result of your settings will be displayed in the Overview Panels window at **Tools > Overview Panels.**

To define a new panel:

1. Go to **Tools > Configuration > Overview Panels Configuration**.
2. Click the **New** button on the toolbar. The two gauges and two graphs are shown in the upper left corner of the window. Click on one to define its settings:

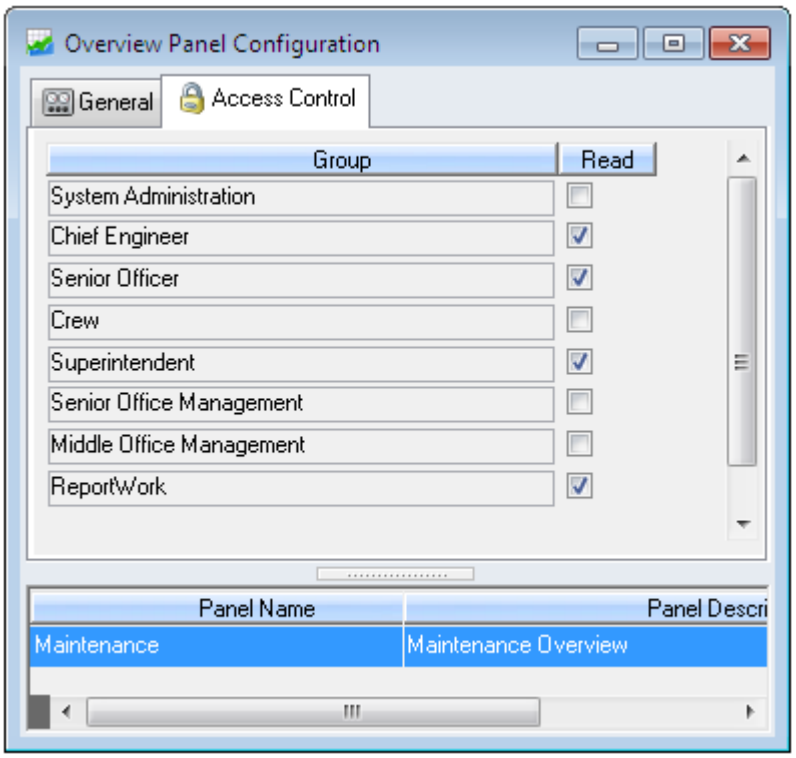


3. Enter a **Panel Name** and **Panel Description** directly into the list part of the window. This is the name for the entire panel. Define an individual **Name** for each gauge and graph in turn as you click on one to set it.
4. Set the ratio boxes and gauges by dragging and dropping SQL statements from any list view into the SQL Maximum, SQL Primary and SQL Secondary boxes. This is done in the same way as when defining alerts to appear on the dashboard. See "Automatic Alert Definition" on page 214, for more information. The three different SQL statements control the displayed values as follows:
   - **SQL Maximum**. Defines the maximum value on the gauge itself.
   - **SQL Primary/Secondary**. Control the position of the first and second indicator lines on the gauge.



5. To define the settings for the two graphs[1], click a graph and the DataWindow Syntax area becomes active. Use the lookup button next to it to load the data window syntax from a PBL file. Any data window syntax is valid so the presentation may not necessarily be a graph.
6. The Access tab contains a list of all defined Groups in your system and you can grant access to the appropriate groups for the selected panel:

[1]The settings for the two graphs are based on data window syntax, which needs to be created in a PowerBuilder data window painter and stored in a PBL file. Users can then import the syntax into AMOS.



7. **Save** your settings and the Overview Panel will become available. If you have left any of the elements undefined, the presentation will adjust accordingly.

Translating Text in AMOS

Translate the text for labels in AMOS into alternate languages within AMOS itself, using the Translation window[1].

Before You Begin - Source Files

SpecTec provides source files containing the English language translatable text[2] in AMOS. These files are located in your AMOS installation folder:

- source.cry - contains a list of words without indication of their location in AMOS. The same translation will be applied to every instance of an original text entry:

Row	Original Text	Translated Text	Info	Text Location
5	Components	Komponenter	OK	
6	Component Copy	Komponenter Kopi	OK	
7	Job Descriptions	Jobb Beskrivelser	OK	

- sourcep.cry - contains a list of words with the path to each one, indicating where it is found in AMOS - whether the text is for example a menu entry or a field label in a window - meaning that different translations can be applied depending on where the text is located in AMOS:

Original Text	Translated Text	Text Location
#QUOTE#Component#QUOTE#	#.d_std_xls_maint_planned..#QUOTE#Compone	#.d_std_xls_maint_planned..
#QUOTE#Component#QUOTE#	#.d_std_component_misc2_loc..#QUOTE#Comp	#.d_std_component_misc2_lo
#QUOTE#Component#QUOTE#	#.d_std_component_status_order..#QUOTE#Cor	#.d_std_component_status_o

- srcupdt.cry - Srcupdt.cry is for making updates to a translation project already in progress.

[1] Translation capabilities are access-controlled.

[2] Most, but not all text in AMOS is translatable. For example, parameter settings like TRUE and FALSE, are not translatable.

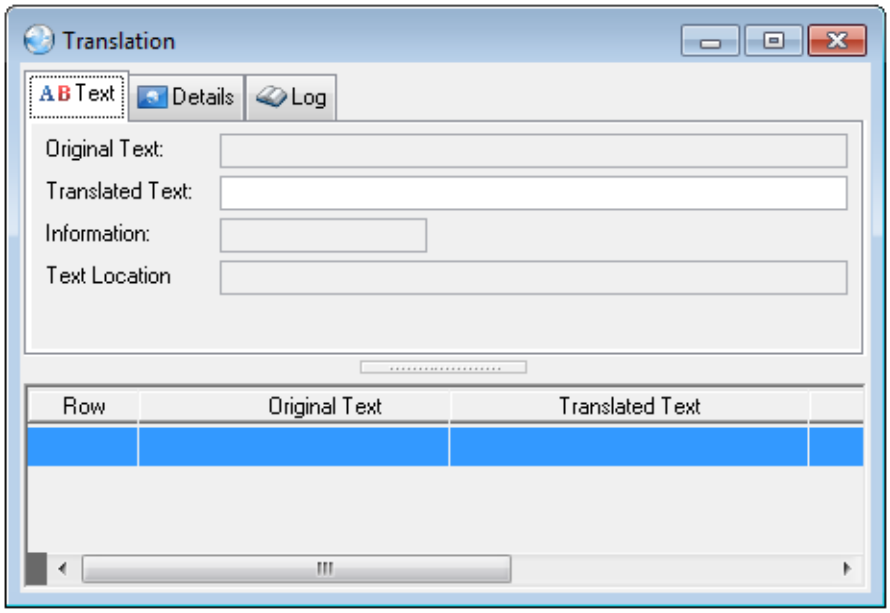
You may need a destination file as well. SpecTec does not provide this.

Starting a Translation Project

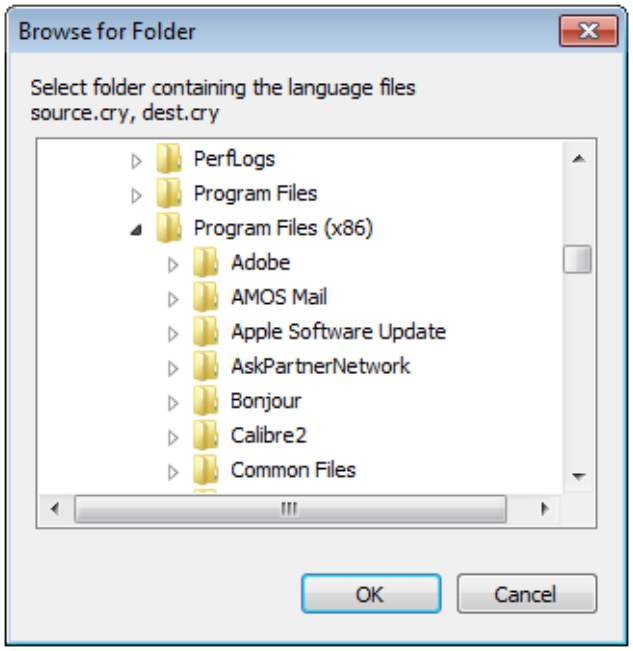
Note: This section is about translating every instance of a word in AMOS regardless of its location. If you want to apply different translations according to where a word is located in AMOS, see "Translating Text with Locations" on page 227.

To start a new translation:

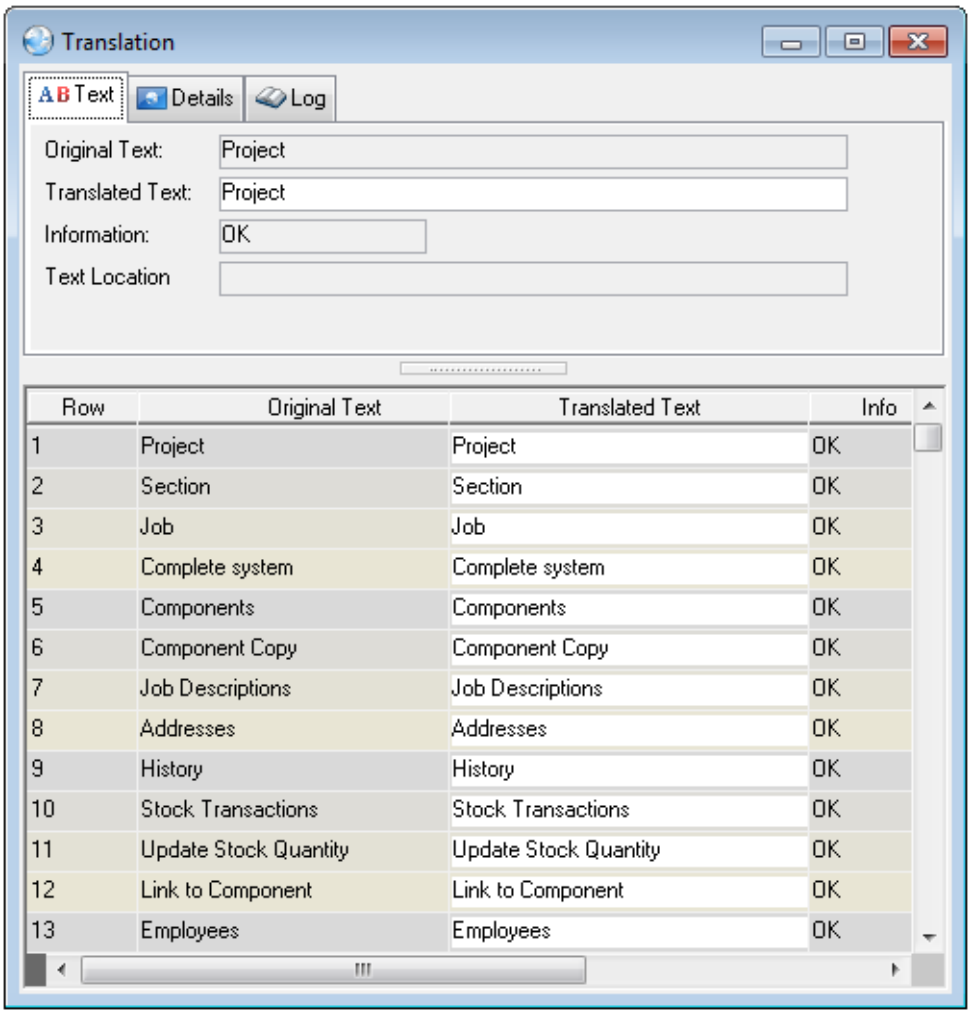
1. Create a destination file: copy and rename the source.cry file to dest.cry.
2. Go to **Tools > Utilities > Translation**. The window is totally empty:



3. Load the source and destination files: go to **Options > Load Words...**



4. Browse to and select the folder where both files are stored. Click **OK**.
5. AMOS populates the window with the English text:

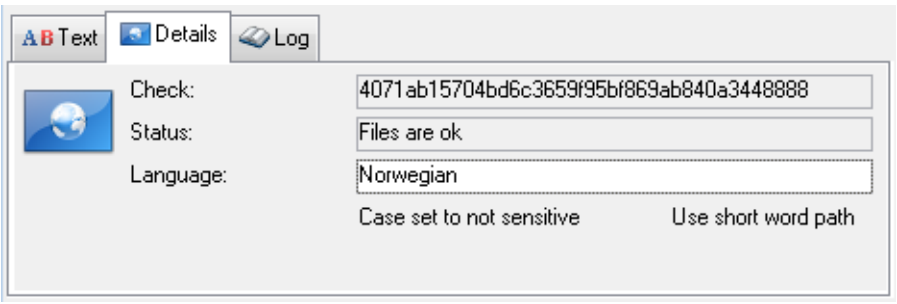


The **Original Text** is the text found in AMOS, loaded from the file source.cry.

The **Translated Text** displays the same words, for you to overwrite with your translations.

In this example, the **Text Location**field is empty because the source.cry file was loaded. Paths to text locations in AMOS only show up when you load the sourcep.cry file.

6. Open the Details tab and enter the **Language** you will translate to:



Write this in English, because it will later be shown in the System Information[1] dialog.

7. Enter a translation for any/all labels in the **Translated Text** column.
8. Click **Save**. AMOS will verify that your new labels are valid and update the 'Info' column with **OK** for every acceptable entry.

[1] Help > About > 'System Info'.

Note that the details of this process are recorded in the Log tab. Double-click on any entry there to scroll to the row in the list. You can **Clear** the log or **Save** it to any location you choose. When your translation is complete, modify the Amosw.ini file to apply the translations in AMOS.

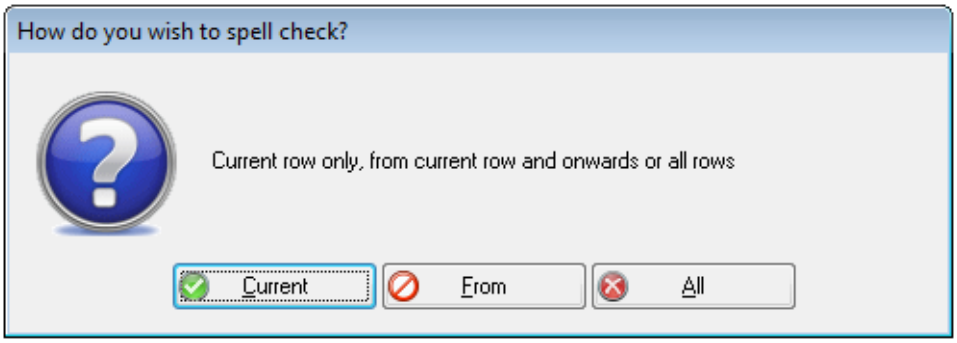
Other Tools in the Translation Window

Here are some other things you can do in the Translation window when working on a translation project:

Spell Check

The standard Microsoft Word spell checker is available provided you have Word installed and using the language you are translating to. When using the spell check, it's a good idea to expand your dictionary as you go, with new or business-specific words so the spellchecker will recognise them next time.

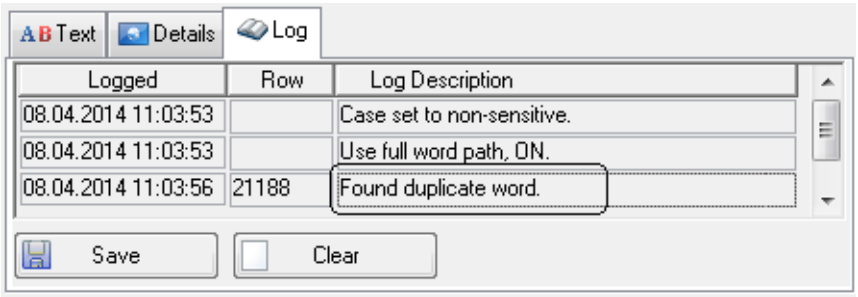
1. Go to **Options > Spell Check**.
2. AMOS asks you to select the rows to check.



3. Make your selection and the standard MS spellchecker opens.

Delete Duplicates

Where the translated text has been duplicated, AMOS will record it in the log tab:



Double-click on an entry in the log to scroll the window to that row. Or, sort the window by the 'Info' column, to see duplicates listed together.

Remove duplicates one at a time by selecting each one and clicking the **Delete** button, or go to **Options > Delete Duplicates** to remove all duplicates in one operation.

Import/Export

To import or export the list of text into text files, go to **Options > Import/Export Text Files**. The standard import/export text files are stored in the AMOS installation directory.

Copy List to Excel

To copy the window contents to an excel spreadsheet:

1. Go to **Edit > Copy List**.
2. Open Excel.
3. Paste the window contents into a spreadsheet.

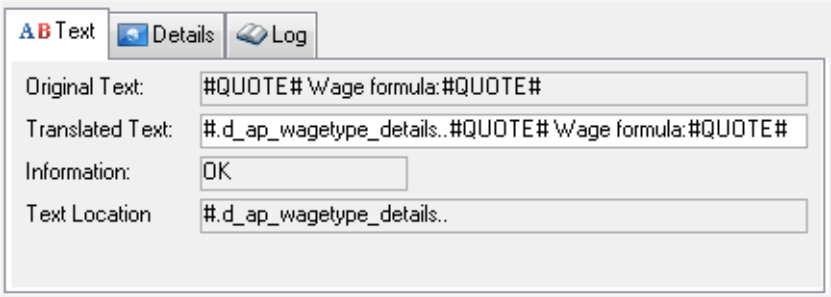
Translating Text with Locations

The same text can appear in multiple places in AMOS - to translate certain instances of it only, or to translate the same word to different translations depending on where it appears in AMOS, use the sourcep.cry file.

1. First, locate the sourcep.cry file in your AMOS installation folder. Rename it to source.cry. The dest.cry file will be automatically generated for you.
2. Return to AMOS and open the Translation window.
3. Go to **Options > Load Words...** and select the folder where both .cry files are stored.
4. When AMOS loads the English **Original Text**, a path showing the **Text Location** in AMOS for each entry, is also displayed. The process for translating and then applying the translated text is the same.

EXAMPLE

In the illustration below the text 'Wage formula:' is found in the datawindow object d_ap_wagetype_details:



Applying Translated Text in AMOS

To see the translated text in AMOS, log out when you have finished the translation. Activate the translations:

1. Locate the Amosw.ini file in the AMOS installation directory.
2. Open the file and set Translate=1:

```
[Translation]

Translate=1
;          (<Blank> | 1 | 0 )
;                1 = Translation on
;                0 = Translation off
;          <Blank> = Translation off

SourceFileName=source.cry
;          Only applies with "Translation on"

DestinationSourceFileName=dest.cry
;          Only applies with "Translation on"
```

3. **Save** and close the ini file.
4. Log back into AMOS for the translations to take effect. Any non-translated labels will still be displayed in English.

Validation and Special Characters

When you save translated text, AMOS will verify your changes and check for use of these special characters:

Character	Meaning	Shows in AMOS As
~t	tab	#TAB#
~r~n	carriage return	#CR#
&	underline, on a menu item or command button such as &F = F	#LF#
~"	special character, string identifier such as abc~"D~" = abc"D"	#QUOTE#

The format of the translated text must be equal to the original text. This means that if any such character existed in the original text, exactly the same number and type of special characters must be present in your translation for AMOS to accept it and give the status 'OK' to that label.

EXAMPLE

"&Print~tCtrl+P" could be translated to "&Skriv ut~tCtrl+P". The & defines that the character immediately following it should be shown with an underscore in the menu entry, both in the original text and in the translated text.

Updating a Translation Project

A srcupdt.cry file is supplied with every new version of AMOS. This file contains all of the new words available to translate.

To update your current source and destination files with new words:

1. Open the Translation window.
2. Go to **Options > Load Words...** and select the folder where your original source.cry and dest.cry files are stored.
3. Go to **Options > Update Words**.
4. AMOS will load the new words in the update source word cry file (srcupdt.cry) and merge them into the existing list.
5. AMOS will inform you of how many rows were added.

The process for translating and then applying the translated text is the same.

CHAPTER 7

External Communication

This chapter includes the following topics:

Export/Import 230
Introduction to e-Business 239
Condition Based Maintenance 256
Hand Terminal Interface 260
SMS Notifications 262

SpecTec

Export/Import

Your AMOS Business Suite database contains data about stock levels, requisitions for purchases and other information that needs to be sent to your head office at regular intervals. To do so, data needs to be exported from the local database and transferred. Similarly, data from the head office needs to be imported. The most common type of transfer is between the head office which contains all data from all sites, and the various remote sites.

You can handle this data synchronisation in different ways:

- Automate the exchange with AMOS Replicator. It's only necessary to initiate specific tasks according to a defined schedule. AMOS will automatically take care of the export or import, and data transfer.

  See the documentation for AMOS Replicator for more information.

- Handle the exchange 'manually' using the AMOS Business Suite native export/import functionality. This may be necessary if a problem occurs with the automated tasks.

  See the following topics in this documentation for more information.

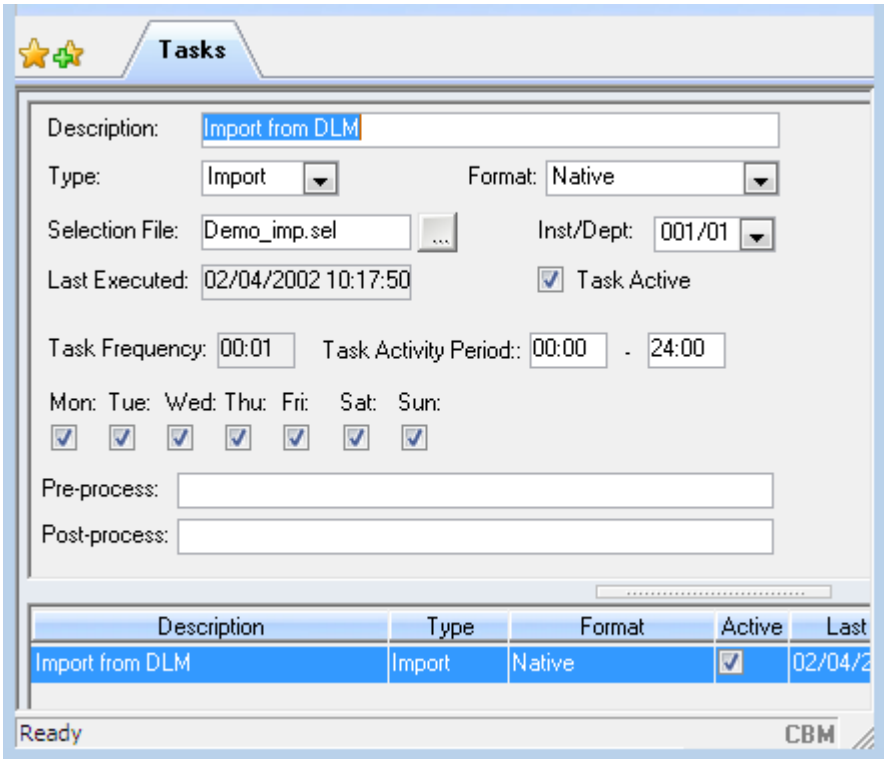
Note: Native export/import does not support the exchange of BLOB columns - in this case, use AMOS Replicator.

Export/Import Tasks

Create tasks to handle data export from the local database; or to import data to it. Associate each task with a selection file; these contain the rules for the data transfer.

Creating a Task

1. Go to **File > Export/Import > Tasks**. Search for an existing task or click **Filter** to open the window.
2. Click the **New** button on the toolbar.



3. Enter the task's function in the **Description** field.

4. Select the **Type** of task:
    - **Import.** Import specific files from the main location into the AMOS database.
    - **Export**. Export files from the local AMOS database to transmit to the main location.
    - **Generic**. Handle various system maintenance tasks. For example, a task to compress newly imported files, archive them, and delete the files on the directory to clear it for the next batch of files.
5. Select the file **Format**'Native' for an export/import task. There are three other options for other types of automated tasks.
    - **Generic**. For the ShipNet interface.
    - **Portal**. For AMOS HTML e-Business solutions.
    - **Remote Work Flow**. For performing work flow actions remotely. This option will only appear if the system parameter 'Use Remote Work Flow' is set to TRUE.
6. Choose a **Selection File**. It contains the rules for the data transfer.
7. Select the **Installation/Department**where the import and export logs are kept.
8. Add information about when and how often to perform a task:

    Task Frequency. The number of minutes between task execution.

    Task Activity Period. The time frame during which the task can occur.

    If the task is only performed on certain days of the week, make sure that the correct **weekdays** are checked.
9. The **Pre-process** and **Post-process** fields are for naming batch files to carry out before and after the selection file. Use the file extensions .Bat, .Com and .Cmd.

    > **EXAMPLE**
    >
    > Define a pre-process batch file to get e-mail files containing data for import, and a post-process batch file to delete imported files. These files should be located on the same directory as the selection file for the task. If not, provide the full path of the batch file(s).
10. To temporarily de-activate a task, unflag the **Task Active** box. As long as the box is flagged, the task will run whenever the Task Server is activated.
11. **Save** your task.

Performing a Task on the Spot

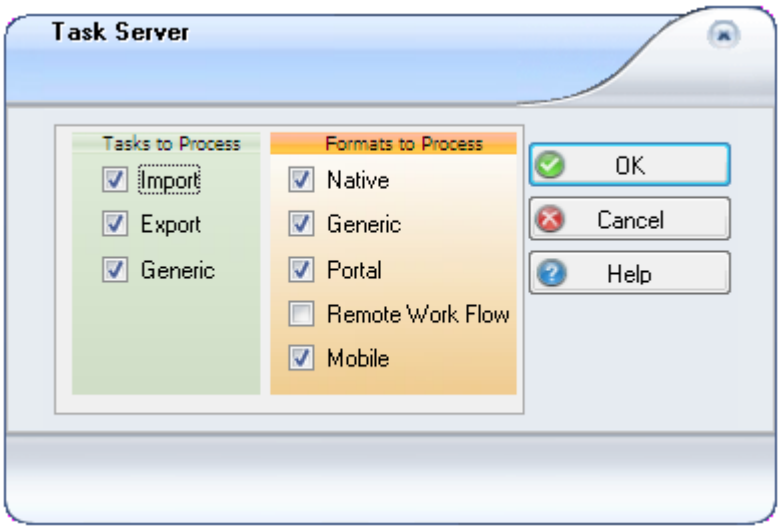
You can perform any task manually as needed:

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

The Task Server

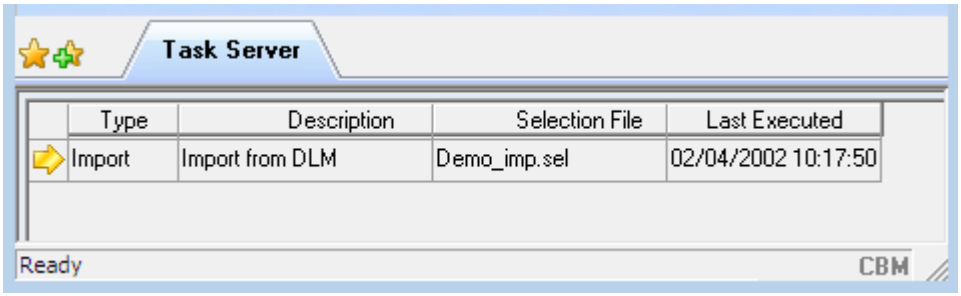
To automate the execution of defined import/export tasks:

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



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

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



You can automate the task server operations using these command line parameters:

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

Here is an example string:

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

Manual Export/Import

If no automated tasks are defined, you can perform them manually. When you run an export or import manually, you choose the selection file to use and specify a file name. This is useful for error corrections, but for normal data transfer using tasks is recommended.

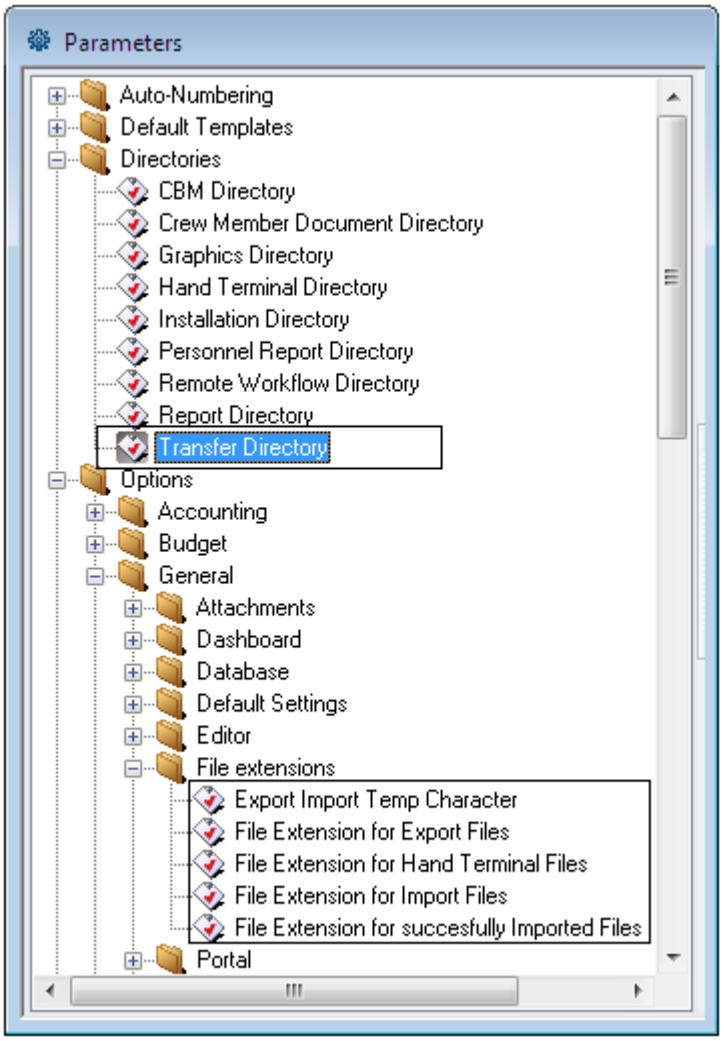
To perform a manual export or import:

1. Go to **File > Export/Import > Export** or **Import**.
2. Choose the export/import **Format**. Add a **Description** to the export/import if required.
3. Specify a **Selection File** to handle the control file for the export/import operation. The default file extension of such files is .SEL. Click the lookup button and AMOS will look for a selection file in the Transfer directory.
4. Specify the file to be exported/imported in the **File Name** field.
5. Click **OK**.

6. AMOS gives export/import files numbers, automatically incrementing by one from the last operation when you go ahead. If the process fails, click the lookup button again and select an existing file name. AMOS presents a warning dialog; click **OK** to proceed and overwrite the existing file.

Setting Transfer Directory and File Extensions

You can set the transfer directory in which you keep import and export files, and define the extensions for the different types of files.



Setting the Transfer Directory

1. Go to **Tools > Configuration > Parameters**. Expand the 'Directories' folder.
2. Select **Transfer Directory**. The default directory is the AMOS installation Transfer sub-folder.
3. If you want to change the default, lookup a directory where AMOS should find import files and send export files to.
4. **Save** any changes you have made.

Defining File Extensions

1. Go to **Tools > Configuration > Parameters > Options > General**. Expand the **File Extensions**folder. The default settings are:

   EXP - Export Files, Import Files

   HTD - Hand Terminal Files

OK - Successfully Imported Files

2. You can leave the parameters set to the default or change them. You should set the 'File Extension for Export Files' and 'File Extension for Import Files' in opposite ways at an installation and at the head office.

   Export Import Temp Character

   The characters to be used for split files created during import.

   File Extension for Export Files/Import Files

   AMOS maintains a sequential number for both export and import operations. The numbers name the export/import files, so to differentiate between the files created by export and ready for transfer to another site, and the received files which are ready to be imported, define file extensions for export files and for import files. *Default setting:* EXP

   File Extension for Hand Terminal Files

   A hand terminal may be used to record stock transactions and the data may be exported as a file for import into AMOS stock levels. Specify the file extension for hand terminal files. *Default setting:* HTD

   File Extension for Successfully Imported Files

   Define an extension for import files that have been successfully imported by the system. *Default setting:* OK

3. **Save** any changes you have made.

Export/Import Selection File Commands

Export and Import Selection Files with the extension .SEL contain commands which determine how to handle the actual export or import operation.

- **Export Selection Files**. Control the information sent from the exporting site. Send only the information that is required at the receiving site.
- **Import Selection Files**. Control the information received at the importing site. During import AMOS enforces database integrity: that is, a file is not imported unless all the information is either already in the system or in the file you have received. If information is missing, the import will fail. For this reason, the order in which files are imported is crucial.

Export Selection File Commands

MarkedRecordsOnly <On/Off>

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

UnmarkExportedRecords <On/Off>

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

IgnoreDeleted <On/Off>

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

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

Department All/<Installation number/Department number>

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

DEPARTMENT 002/01

DEPARTMENT 003/02

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

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

CheckSum <On/Off>

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

Register <TableName>

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

If <SQL Select Statement> - allows you to specify the criteria that the table entries must satisfy to be exported. When using 'If' statements, add the text `amos.' to specify additional tables within the search criteria.

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

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

LastExportedDate . Date of the last export for the specified installation/department;

LastImportedDate . Date of the last import for the the specified installation/department; and

Today . Current date.

Import Selection Files

InsertData <On/Off>

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

StampDate <On/Off>

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

StampMark <On/Off>

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

OverwriteOldData <On/Off>

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

IgnoreDeleted <On/Off>

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

Department All/<Installation number/Department number>

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

Register <TableName>

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

If <SQL Select Statement> - allows you to specify the criteria that the table entries must satisfy to be imported. When using 'If' statements, add the text `amos.' to specify additional tables within the search criteria.

ExcludeFields <Table Field List>

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

IncludeFields <Table Field List>

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

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

LastExportedDate . Date of the last export for the specified installation/department;

LastImportedDate . Date of the last import for the the specified installation/department; and

Today . Current date.

Selection File Examples

Example 1

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

Example 2

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

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

The FormType field may have one of three values:

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

The FormStatus field may have one of five values:

- 1 indicating Active
- 2 indicating Parked
- 3 indicating Filed
- 4 indicating Split
- 5 indicating Cancelled

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

Example 3

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

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

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

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

Example 4

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

Example 5

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

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

Selection File Keywords

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

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

Example:

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

or

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

Today

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

LastExportedDate

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

LastImportedDate

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

Here are some examples of how to use these keywords:

```
Register WorkOrder If DueDate <= Today
```

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

Avoiding Problems with Import and Hierarchies

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

SQL Anywhere:

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

Oracle:

```
[Import]
```

Other Ways to Access Database Commands

Press the **CRTL SHIFT F9** keys together (or go to **Tools > Utilities > SQL (File)**) to access database commands. This opens a dialog box where you select a command file to execute commands.

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

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

Available Statuses for SQL Commands

The SQLCommand table stores SQL statements for execution. The StatusID column reflects the status on each statement in the table. These statuses are:

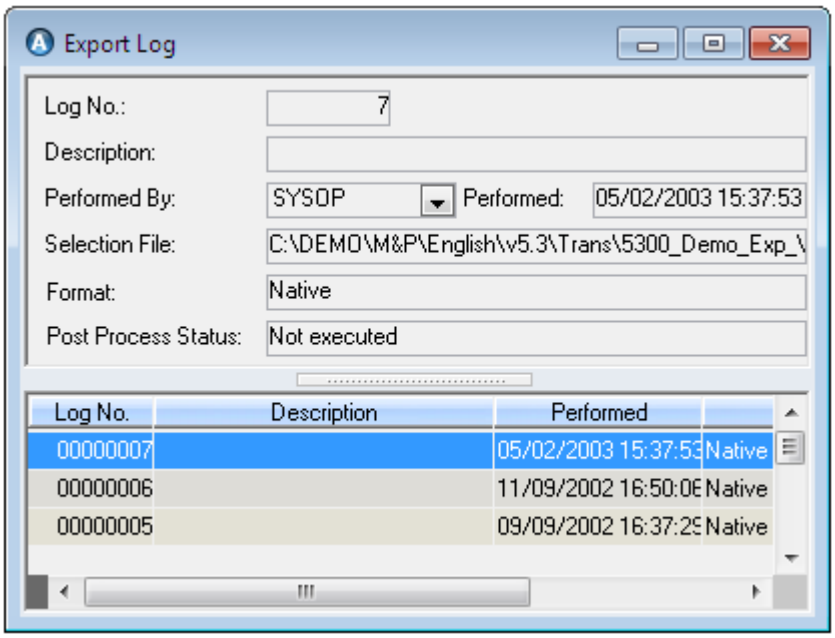
0	Not executed
1	Executed successfully
2	Executed with error
3	Not to be executed [here]
5	Under execution

Export/Import Log and Portal Log

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

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

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



The **Portal Log** at **File > Export/Import > Portal Log** records and displays error messages and related information concerning portal importing.

Click a **Form No.** lookup to open the original form. To see the entire message hover over the entry with the cursor. Select **Show XML** from the Options menu to display the stored XML document for the selected log entry.

Introduction to e-Business

With an e-Business solution you transform all the paperwork, manual entry of price information, and sending out requests for quotations into an automated process.

AMOS e-Business Direct

Send purchasing forms like Requests for Quote and Purchase Orders as email attachments in the form of an HTML document, directly to vendors by printing the form to an AMOS e-Business Direct portal. It works like this:

1. A user prints a form to the portal and the form is tagged and queued for export.
2. The driver picks up that form, converts the data into XML, JSON or pure HTML and creates an HTML page.
3. The HTML page is stored in the portal outbox and sent automatically to the vendor's email address.
4. The vendor receives the email and can open and read it. He/she can also fill in information, and then select a command on the page.
5. The system produces another email with this data and sends it back to the AMOS user.
6. AMOS reads the incoming mail and produces an import file.
7. The file is processed and the form is updated with the new data.

Configuration

Follow these steps to configure AMOS e-Business Direct for use:

1. Check or set the relevant sharing, access rights and system parameters. See "Sharing, Access Rights and Parameters" on the next page.
2. Define the portal format. See "Defining Portal Formats" on page 243.

3. Register the e-Business Direct portal and apply settings. See "Registering a Portal" on page 244.
4. Set up e-Business users. See "e-Business User Contact Details" on the facing page.
5. Connect the vendors you will communicate with. See "Connecting Vendors" on page 248.

(Optional) You can create export/import tasks to further automate the process. See "Export/Import Tasks for e-Business" on page 249.

Sharing, Access Rights and Parameters

Before changing any parameters and for advice on setting access rights, we recommend that you contact your local SpecTec representative.

Sharing

The following sharing parameters for AMOS e-Business are available at **Tools > Configuration > Parameters > Sharing > Tables >** :

- e-Business Portal
- Portal Log
- Quotation/Portal
- Order Form/Portal

SpecTec recommends that you set the sharing for the e-Business Portal on Global level; and that you set sharing on the remaining three parameters on the same level as the Order Form information is already shared.

Access Rights

Access rights to the following registers are required to set up AMOS e-Business:

- e-Business Formats
- e-Business Portals

e-Business users may require access to the following fields:

- Form: Portal Queue
- Quotations: Portal Queue

Note that access to the Portal Queue checkboxes allows users to simply check the box, thereby exporting to the e-portal and bypassing the portal validation and print operation. Due to this, SpecTec recommends that you do not allow any users access to these checkboxes.

Set the access rights at: **Tools > Configuration > Access Control > Groups > Options > Access Control** window > Registers tab and Fields tab.

System Parameters

The following system parameters control the behaviour of AMOS e-Business. They are located at **Tools > Configuration > Parameters > Options > General > Portal > [Parameter Name]**. It is up to you to set these parameters as desired, or leave them with the default settings.

For further information and advice, contact your local SpecTec representative.

Billing Address

Select an address code from the Address register, to define the address where purchase invoices should be sent.

Default setting: Empty

Log Successful Portal Operations

Set to TRUE, the system will store successful portal operations in the portal log.

Default setting: FALSE

Portal Line Item Reference Priority

If the value for this parameter is set to VendorRef, MakersRef the system writes the Vendor Reference value into the XML file if both values are available. If only one of the two is available, that value is written into the XML file. If this parameter is set to MakersRef, VendorRef the Makers Reference is written to the XML file as the Identification value.

Default setting: MakersRef, VendorRef

Prevent Update of Quotation When One is Selected

When set to TRUE and a vendor is selected, the XML file will not be imported and will be renamed to *.OnOrder. If set to TRUE and no vendor is selected, the XML file will be imported. Set to FALSE the portal will import the XML file whether a vendor is selected or not.

Default setting: FALSE

Show Error Messages During Portal Export

This parameter, if set to FALSE, allows Portal Export to continue uninterrupted in the event of errors occurring during export. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an export error occurs and further data export will be stopped until the error message is cleared by the user.

Default setting: TRUE

Show Error Messages During Portal Import

This parameter, if set to FALSE, allows Portal Import to continue uninterrupted in the event of errors occurring during import. Any errors encountered are written to the portal log and can be viewed later. If the parameter is set to TRUE you will receive an error message each time an import error occurs and further data import will be stopped until the error message is cleared by the user.

Default setting: TRUE

Store Imported XML Document in Portal Log

This parameter, when set to TRUE, allows you to see the imported XML document associated with the selected error message in the Portal Log, accessed via the Options menu. If set to FALSE, there will be no Options menu available and no XML documents will be stored.

Default setting: FALSE

e-Business User Contact Details

To include the AMOS purchasing user's contact details in outgoing communications with an e-Business vendor:

1. Create an address record for the employee.
2. Link this address to the employee's record in AMOS.
3. Link the employee record and the AMOS user record together.

AMOS e-Business Direct is *only* available to users whose address, user ID and employee record are linked together. See the following sections for instructions on these three tasks.

Creating an Address Record

Create an address record for your employee:

1. Go to **File > Open Register > Addresses**.
2. Click **New** on the toolbar.
3. Enter the address details like name, phone and fax number - these will be included in e-Business exchanges.

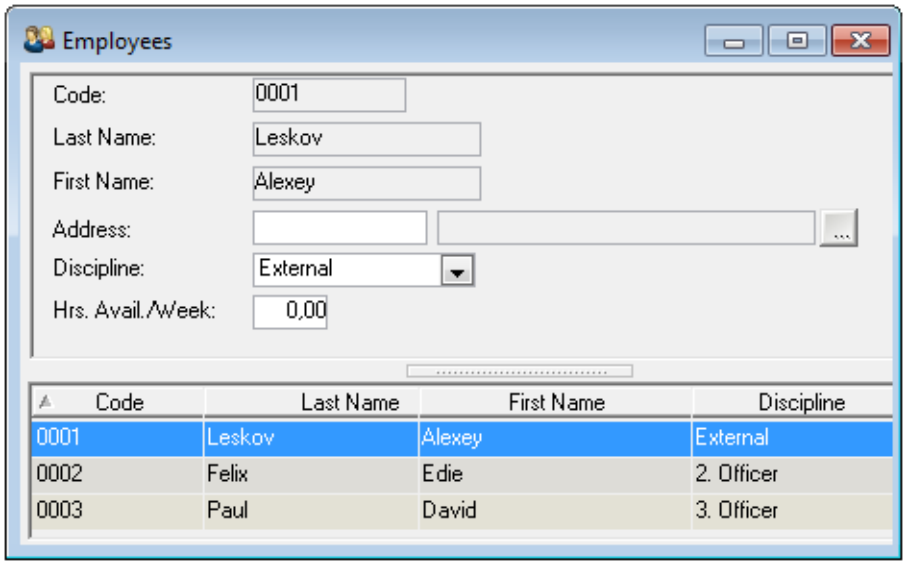
   The most important thing here is to enter an email address for the employee.
4. **Save** and close the window.

Linking the Address and the Employee Record

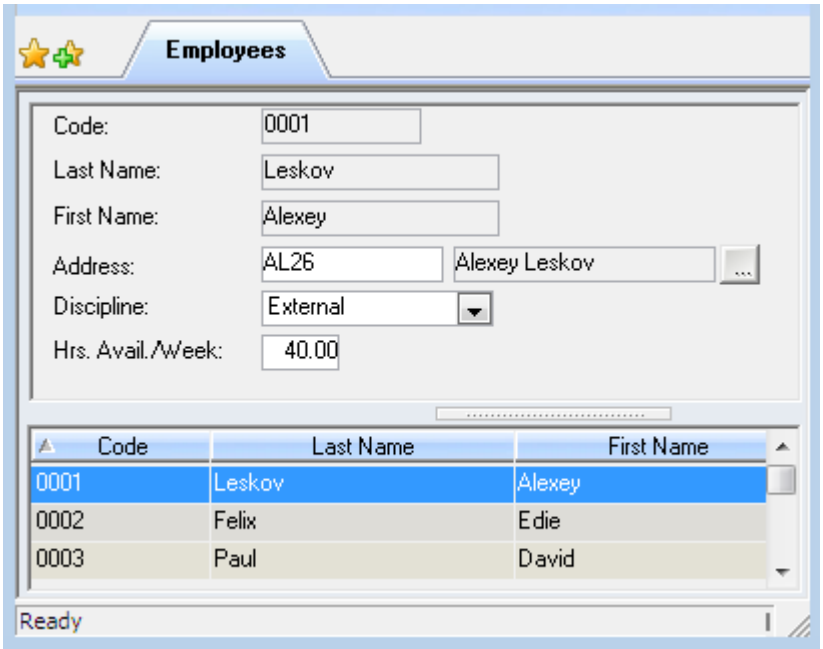
Note: If your system license contains AMOS Personnel, go to **Crewing > Employee**. Click **New** in the Employee Overview window and create and save a record for the employee.

For the correct contact details to show up when this person issues a form to a vendor from AMOS, link the address to the employee:

1. Go to **File > Open Register > Employees**.
2. Select the employee's record:



3. Lookup and select the **Address** you created for this person:

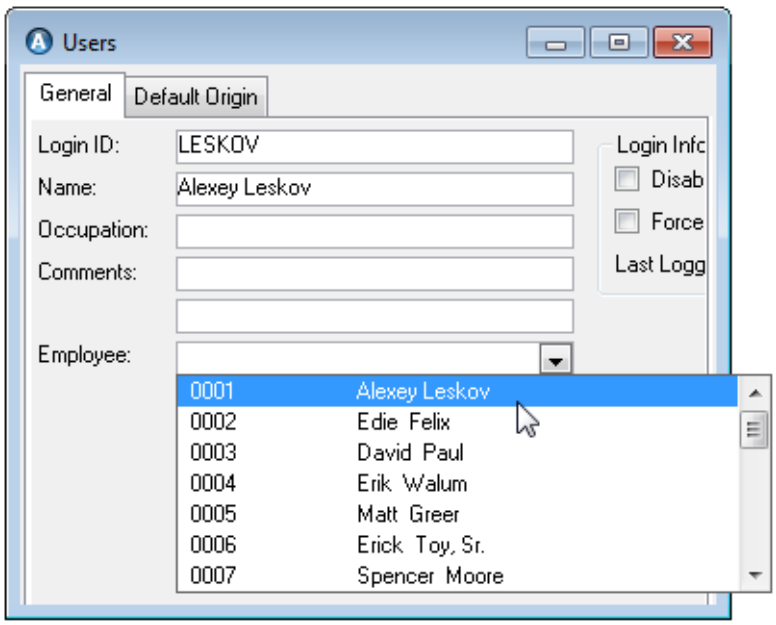


4. **Save** and close the window.

Linking the Employee and the AMOS User

Link the employee and AMOS user record together:

1. Go to **Tools > Configuration > Access Control > Users**. Click **New** on the toolbar.
2. Enter a **Login ID** and **Name**.
3. Select the **Employee** from the drop-down list:



4. **Save** and close the window.

Note: Every user must be a member of at least one user group to get access rights in the system.

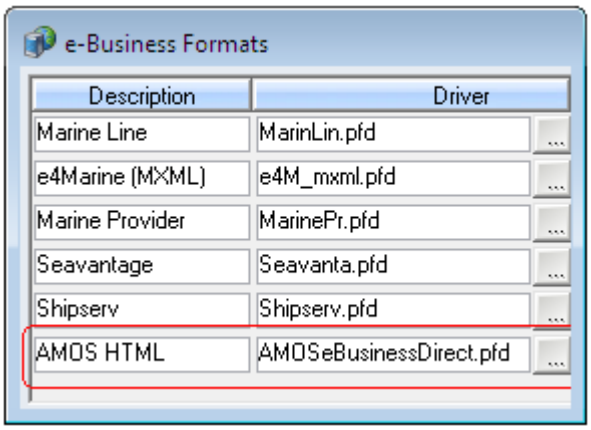
Defining Portal Formats

During a portal export AMOS generates an MTML file in a dedicated 'Portal Format Driver' file (*.pfd). AMOS uses the same pfd file during portal import to interpret incoming MTML files.

PFD files are copied into the root installation folder when you install AMOS. The file 'AMOSeBusinessDirect.pfd' is the pfd for AMOS e-Business Direct.

To define use of a portal format driver in AMOS:

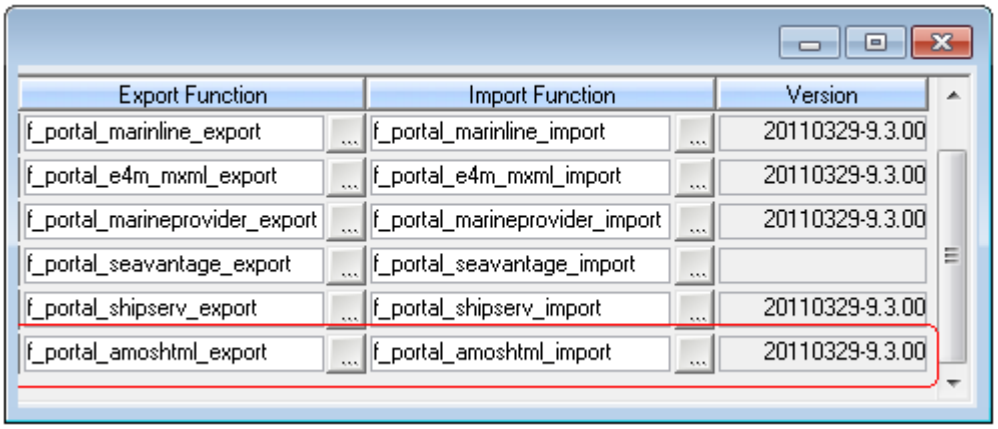
1. Go to **Tools > Configuration > e-Business > e-Business Formats**.
2. Click **New** on the toolbar.
3. Add a name for the format in the **Description** field.
4. Lookup 'amosembusinessdirect.pfd' in the **Driver** field. You'll find it in your AMOS installation folder. AMOS will automatically add the entire path with the driver name. Delete this path so that only the file name shows.



5. Click the lookups next to the **Export** and **Import Function** fields. The application will automatically import the function files from the driver file.

   These commands activate the required function from the driver file.

6. The **Version** field contains the identification code for the driver you are using. Driver files may be periodically updated and you can check this code to ensure that you are using the most up to date drivers.

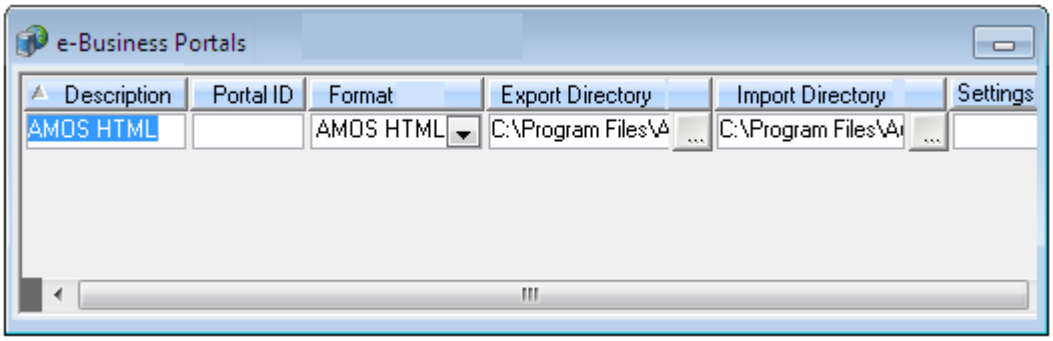


7. **Save** and close the window.

Registering a Portal

Any portal you are going to send information through needs to be registered in the e-Business Portals window with portal settings defined:

1. Go to **Tools > Configuration > e-Business > e-Business Portals**.
2. Click the **New** button on the toolbar.



3. Enter a name for the portal in the **Description** field. Leave the **Portal ID** blank. Select the portal **Format**defined for e-Business.
4. Lookup your 'In' and 'Out' folders where the files will be stored upon export and retrieved for import in the **Export Directory** and **Import Directory** fields.

   AMOS e-Business Direct - typically your Transfer Directories as defined in AMOS.
5. Click the **Settings** lookup. The next dialog shows all available attributes for the portal, and a blank line at the bottom for adding your own attributes.

   You can enter a setting for some attributes, like TRUE or FALSE - or on others type in names and numbers separated with semi-colons (;). The blank line at the bottom is for adding your own settings as needed.

   Click **OK** to return to the main window and see the results in the **Settings** column.

   See "Portal Settings" below for an explanation of each setting.
6. **Save** and close the window.

Portal Settings

Click the **Settings** lookup in the e-Business Portals window to open the Portal Setting dialog.

The settings in the table below are available for e-Business Direct portals.

Here's a sample setting string assuming the use of custom templates:

```
MailUser=JoeDoe;MailPassword=xyz;POFTemplate=Z:\AMOSe-Busi-
nessDirect\Pot.html;RFQTemplate=Z:\AMOSe-Busi-
nessDirect\RFQt.html;SendMail=TRUE
```

Setting	<Options>, Description
SendingMailProtocol	<MAPI> Default. Systems running MAPI receive security messages to indicate that mails are being sent on their behalf. <SMTP> SMTP systems do not receive warnings that mails are being sent and so do not require acknowledgement before sending mail. To use SMTP set 'SendingMailProtocol' value to SMTP and set the other portal settings for SMTP as appropriate. There will be no mails in the sendbox as the system will not connect to a users mailbox on this protocol. If you leave the protocol set to MAPI mails will be sent as before and the other portal settings for SMTP will be ignored.
SMTPServer	The name of the SMTP server.
SMTPPort	The port to connect to the server, usually port 25.
SMTPUser	The user name on the SMTP server, if the server requires it.
SMTPPassword	The user password on the SMTP server, if the server requires it.
MailUser	A mail account known to your e-mail server, used during send.
MailPassword	The mail account's password, used during send.

Setting	<Options>, Description
MailMessageFile	A TXT file containing the text for emails sent to vendors. If the txt file is missing or empty, this standard text will be inserted into the outgoing emails: 'Please open and read the Attachment File.'. To send custom text, save it into a text file and then enter the file's location and name here: MailMessageFile=c:\my email.txt The contents of the 'my email.txt' file will replace the standard text on outgoing email. The standard messages for RFQs and POs are the same. To insert separate messages for RFQs and POs, use the next two parameters below.
MailMessageFileRFQ	Save custom text for RFQs as a text file and enter its location here: MailMessageFileRFQ=c:\my RFQ email.txt The contents of the 'my RFQ email.txt' file will replace the standard text on outgoing RFQ emails. If you don't set a value here, any text entered for MailMessageFile will be used for outgoing quotations.
MailMessageFilePO	Save custom text for POs as a text file and enter its location here: MailMessageFilePO=c:\my PO email.txt The contents of the 'my PO email.txt' file will replace the standard text on outgoing PO emails. If you don't set a value here, any text entered for MailMessageFile will be used for outgoing purchase orders.
POFTemplate	An HTML filename with path that contains your organisation's Purchase Order Form style.
RFQTemplate	An HTML filename with path that contains your organisation's Request for Quote style.
SendMail	<TRUE/FALSE> Set to TRUE. You can only set FALSE during the setup process (to avoid sending the mail), for debugging purposes.
ReturnMailAddress	A valid address used to receive data back from the supplier.
XMLConfiguration	XML data island configuration file, which tells how to retrieve and build the XML data inside the HTML document the portal produces.

Setting	<Options>, Description
AllowUpdateInMultiVendor	<TRUE/FALSE> Set to TRUE to allow updating stock item multi vendor details from information exchanged via portals. Conditions to meet on address and portal level: Flag 'Allow Update of Multi Vendor' checkbox on Address record. This also allows updating quotation multi vendor records. To update price, the purchase unit set for the item must be the same as the unit quoted by the supplier. Flag 'Update Stock Items' checkbox on the Quotations window. If the vendor exists on the Stock Items > Vendor tab, the price will be updated. If not, the vendor will be added with the newly quoted price.
AddCheckSum	<TRUE/FALSE> Set to TRUE to insert a comment into the file for tamper control. See "Tamper Control" below for more information.
HTMLType	<HTML/XML; HTML/JSON; HTML/NoScript> Tells AMOS which type of HTML file to produce. See "3-In-1 Portal Driver: Three HTML Concepts" on page 253.
JSONLibrary	<INTERNAL/URL or FILE> When the HTMLType is set to HTML/JSON, this setting tells AMOS how to link the JSON library to the produced HTML file. See "JSON Library" on page 255 for more information.
MarkOfTheWeb	Due to increased security restrictions in the Local Machine Zone (when running with WinXP SP2), dynamic data in HTML files sent to vendors is sometimes not displayed. Mark of the Web (MOTW) is a feature of Windows Internet Explorer used to determine the security zone of the page. When MOTW is set, the value will be added to the HTML document and Internet Explorer will assign the page to the Internet Zone instead of the Local Machine Zone, displaying the dynamic data correctly.
UseVendorSpecificItemDescription	<TRUE/FALSE> Set to TRUE, the system uses the multi-vendor item description if present and if not, then the spare type part name.
CommitAfterSuccessfullExport	<TRUE/FALSE> Set to TRUE to perform a commit after every sucessful form processed.
SendMailScript	<TRUE/FALSE> Set to TRUE to add a javascript to replace the send mail HTML action. This is not in use if you set HTMLType to HTML/NoScript.

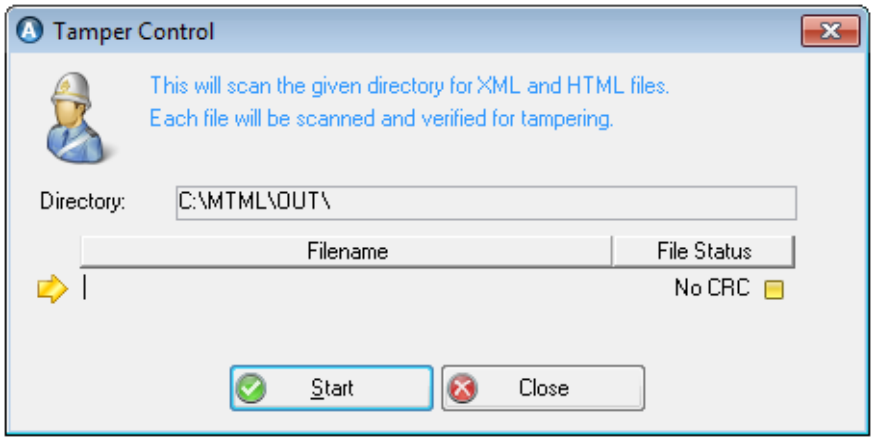
Tamper Control

Some external programs can alter the content of the HTML and XML files AMOS produces. Sometimes these alterations are incorrect and produce faults at the receiving application. Adding a checksum into the outgoing files allows AMOS to check if they have been altered or not.

The checksum is an option in the portal settings string: setting it to TRUE (default) will insert a comment into the file to be used for tamper control. If you set it to FALSE, no comment will be inserted. See"Portal Settings" on page 245 about adding this checksum.

To scan files for tampering:

1. Go to **Tools > Configuration > e-Business > e-Business Portals**. Select the e-Business Direct portal .
2. Go to **Options > Tamper Control**. The Tamper Control dialog opens showing the Export Directory for the portal and the files in it:



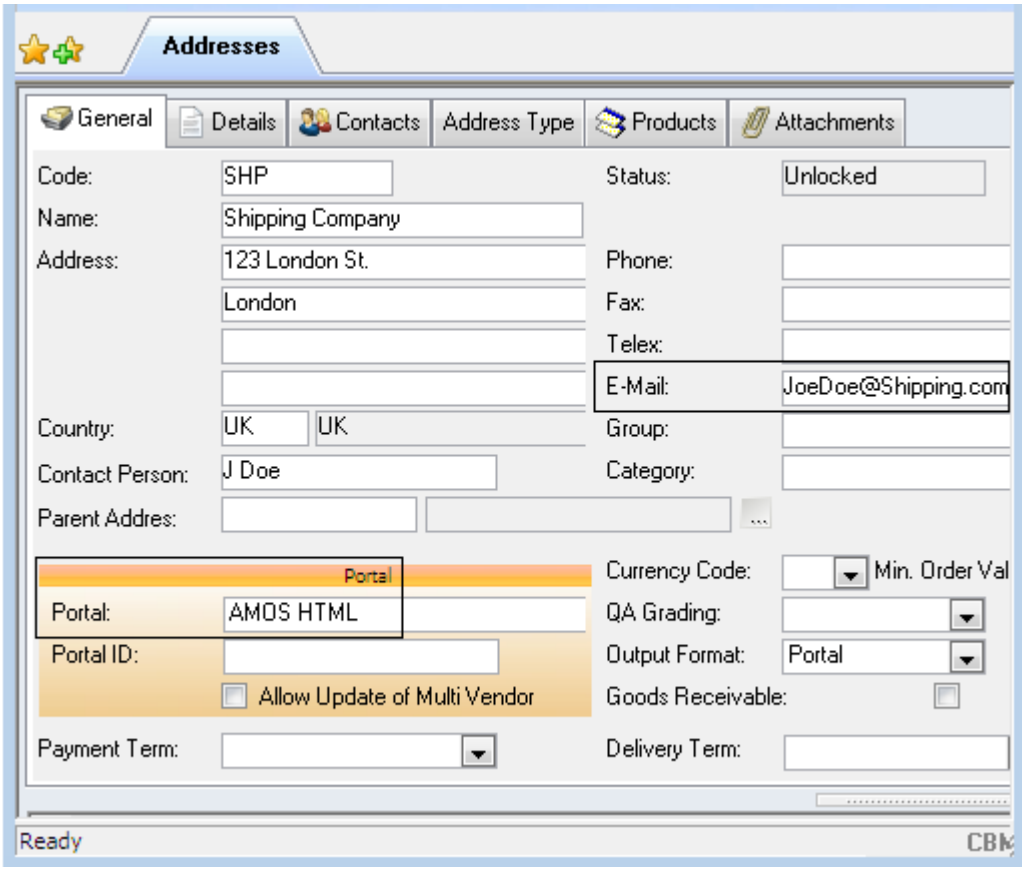
3. Click **Start** to scan all files in the directory. The results may be:
   - **OK**. The file(s) contain a checksum and is validated.
   - **No CRC**. The file(s) did not contain the checksum. If the portal setting AddCheckSum is set to TRUE, this means the file has been tampered with.
   - **Tampered**. The file does contain the checksum and its content has been altered outside AMOS.

AMOS cannot reconstruct a file that has been tampered with. You can choose to delete the file and check the portal flag for the record the file represents.

Connecting Vendors

For each of the vendors you will exchange purchase data with through a portal, create an address record and connect it to the portal driver.

1. Go to **File > Open Register > Addresses**.
2. Select a vendor or create a new one.
3. Make sure you enter the vendor's **E-Mail**. Other general details are optional.
4. Select your e-Business Direct **Portal**.



5. Leave the **Portal ID** field blank.
6. Select 'Portal' from the **Output Format** drop-down.
7. **Save** and close the window.

Export/Import Tasks for e-Business

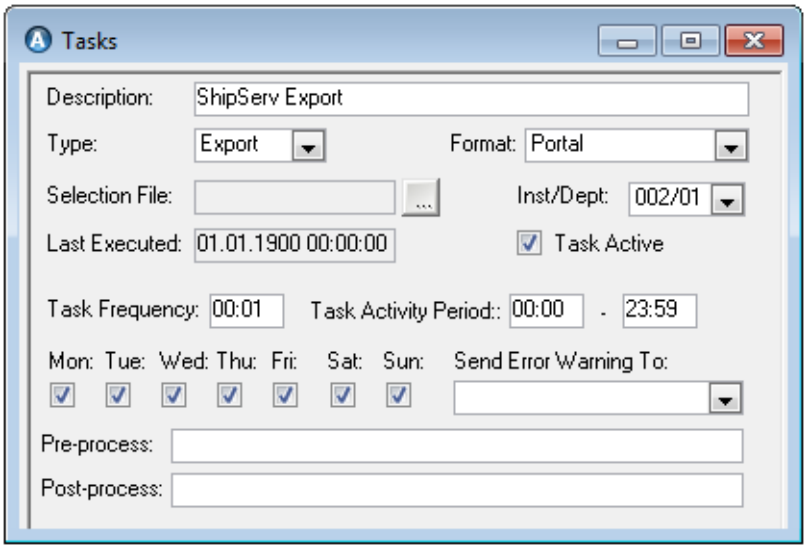
To automate the sending and receiving of information transferred through a portal, you can set up export and import tasks to run with the TaskServer.

Automated Tasks

Create both an import and an export task:

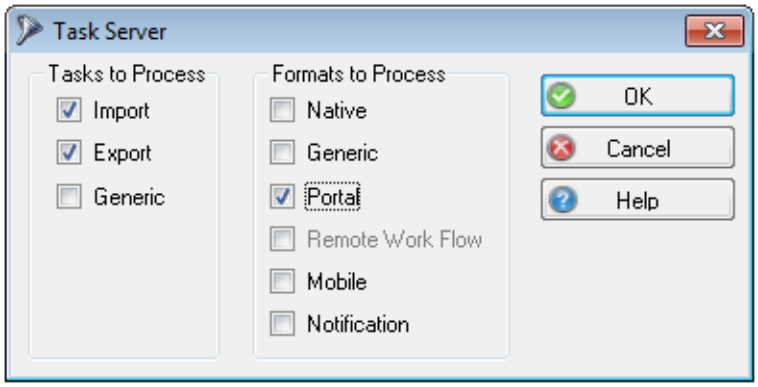
1. Go to **File > Export/Import > Tasks**.
2. Click **New** and add a **Description**.
    - **Type**. Select 'Export' or 'Import'.
    - **Format**. Select 'Portal'.

3. Enter the **Frequency** at which to run the task and the time period:



Start the Task Server to run the defined task(s) at the set intervals:

1. Go to **File > Export/Import > Task Server**.
2. Flag **Import**, **Export** and **Portal** to run the portal tasks only:



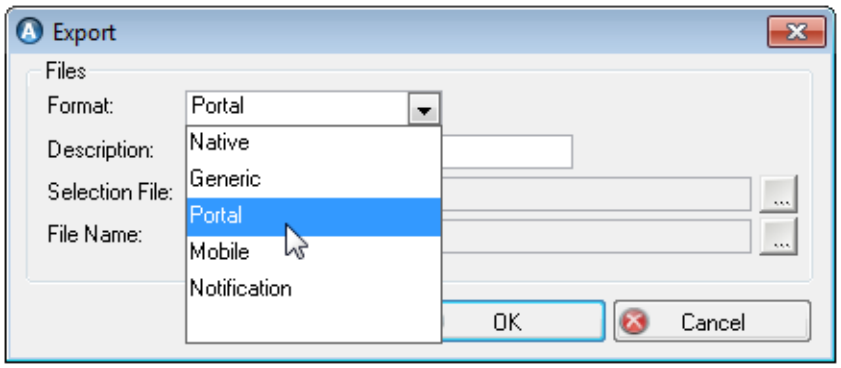
   Click **OK**.

3. You'll see a list of tasks to review. The Task Server needs to run at all times to allow the import and export of files via a portal.

Manual Export/Import

Instead of running the Task Server, you can manually export and import purchase documents to portal:

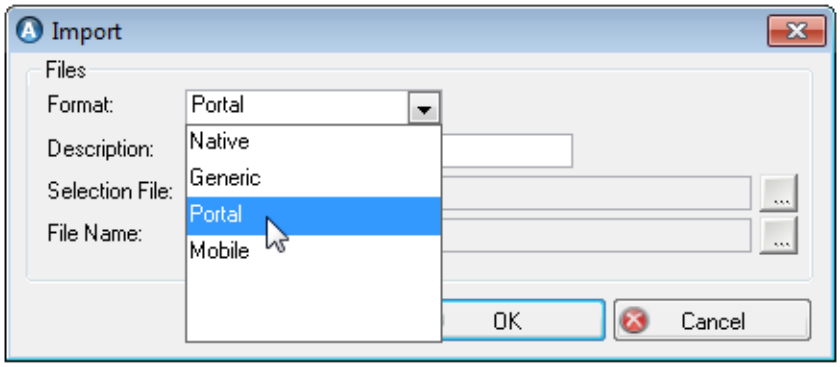
1. Go to **File > Export/Import > Export**.
2. Select 'portal' from the **Format** drop-down and click **OK**:



3. This exports your document(s) from AMOS to the defined 'Out' directory. The MTMLLink FX software will pick it up from there.

When you receive a document in return, the MTMLLink FX software drops it into your 'In' directory:

1. Go to **File > Export/Import > Import**.
2. Select 'portal' from the **Format** drop-down and click **OK**:



3. This imports the content from the vendor's document(s) in your 'In' folder, to AMOS.

Custom Templates for e-Business

You can attach custom templates to forms for use with the portal:

1. Create a new HTML file without any template at all.
2. Copy the file and rename it to indicate that it's the customised one.
3. Place it in a location accessible to all your AMOS users.
4. Edit the file's appearance using any HTML editor or text editor.
5. Ensure that the **Settings** field in the e-Business Portal window contains the path and name of your new template in the settings string:

   ```
   POFTemplate=C:\AMOSe-BusinessDirect\POt.html.
   ```

6. Subsequent purchase orders send through the portal will reflect the template's style.

Using the AMOS e-Business Direct Portal

The AMOS e-Business Direct solution allows exchanges of the following forms, over email through the e-Business Directportal.

From your organisation to a vendor, and from the vendor back to you:

>> Requests for Quotes (RFQ)

<< Quotations (QT)

>> Purchase Orders (PO)

Sending and Receiving Forms

To exchange purchasing forms over an AMOS e-Business Direct portal:

1. Open the Forms window. Create and save a new form as usual. Select a vendor with a portal defined on their address.
2. Tag the form and go to **File > Print**.
3. Select your portal in the Print dialog from the **Destn** drop-down and click **OK**. This flags the **Portal Queue** checkbox on the form and queues the form for export.
4. If you created an export task the task server will automatically export the portal. If not, to export it manually go to **File > Export** and choose the portal.

   Once exported, the **Portal Queue** checkbox on the form is cleared and an HTML file is created and held in the portal's 'Out' folder.
5. AMOS connects to the mail client and sends the email to the vendor.
6. The vendor receives the email and can register details like **Currency** and **Price** on a query form; or on a purchase order can click command buttons to **Accept** or **Reject** the order, and so on.
7. The vendor clicks **Send**and an email is sent to the AMOS user.
8. The returned forms are saved in the portal's 'In' folder. If you created an import task the task server will automatically import the portal.

   If not, to import it manually go to **File > Import** and choose the portal.
9. AMOS connects to the mail client and retrieves the mail. The system updates the form with the vendor's input.
10. The updated form is now available as usual in the Forms window.

Saving Content

You might want to save your HTML files and their content so that you can continue working on the same file at a later stage.

> **EXAMPLE**
>
> A vendor receives a request for quote with 300 items, He saves the HTML file in a local folder and begins working on it, registering prices for 100 items. Rather than completing and sending it immediately, he clicks the **Save Details** button on the form. All details are stored and appear the next time he opens the form to continue working on it. Clicking the **Delete Details** button clears all the previously saved details on the form - for example, after sending the quote.

e-Business Customisation

Users can configure the data to be retrieved on Portals, making the user in full control of the e-business portal driver. This allows full customisation of the content of the HTML documents, including the presentation of the data and which data to include.

For example, with this functionality users can write an SQL statement in the configuration file as required and AMOS will then produce the data in XML format inside the HTML file. Advanced users can remove all the HTML tags and extract the XML data , saving it into a separate .xml file. This xml file can then be used in other applications that are able to read .xml files, such as Microsoft Excel.

The user's SQL might result in text containing RTF formatting, since the SQL can retrieve data from several columns, the text might be a combination of RTF text together with TXT text. For example,

<TXT> + <RTF> + <RTF> + <TXT> - where TXT is normal text without rtf formatting and RTF is text with RTF formatting. AMOS can remove all the RTF formatting in any sub-string and provide a string with all text in TXT format (classic) only.

3-In-1 Portal Driver: Three HTML Concepts

The AMOS e-Business Direct portal driver is supported by Microsoft Internet Explorer version 5.0 and later. As of AMOS Business Suite 9.2, e-Business functionality is now expanded to support all major browsers by the introduction of a three-in-one portal driver concept. This allows AMOS to provide three different types of HTML files, and so enables support on most web browsers. To achieve these three different types of HTML files:

- HTML code is combined with XML data, or,
- HTML code is combined with JSON (JavaScript Object Notation) data, or,
- HTML code is used alone without any need for java script.

You may register the e-Business Direct portal driver multiple times in AMOS, specifying a unique name and configuration for each, thereby enabling AMOS to support all three combinations at once. The type of HTML file AMOS should produce for each configured portal driver is defined by the **Portal Setting 'HTMLType'**.

These three types of HTML configuration are described in the following sections.

HTML/XML

Setting the HTMLType definition to HTML/XML produces an HTML file containing an XML data island. This requires JavaScript to be enabled within the browser and is only supported by Microsoft Internet Explorer.

Adding an XML data island into the HTML file and then reusing the data within the same HTML files is a concept defined by Microsoft and not adopted by other suppliers of web browsers. This has always been supported by the AMOS e-Business Direct portal driver; read about it in "e-Business Customisation" on the previous page. AMOS allows you to define the content of the data island and allows you to reuse it in both Purchase Order and Quotation type HTML files.

Note: HTML/XML and Internet Explorer 10

Microsoft Internet Explorer 10 does not support XML data islands, for improved interoperability and compliance with HTML5. This means that XML data islands are now parsed as HTML, just like in other browsers. This change can impact pages written exclusively for Windows Internet Explorer.

For this reason, SpecTec recommends changing the portal setting from 'HTML/XML' to 'HTML/JSON'. Ensure that Java Script is enabled in your Internet Explorer 10 setup. Any custom template HTML files may need to be adjusted.

Metadata added to the HTML file by AMOS tells Internet Explorer to execute the HTML file in Internet Explorer 9 mode.

Customisation: Data and Presentation

You can customise the content and number of xml data islands using the Portal Setting XML Configuration. This setting points to an XML file containing the definition of all data islands, their names and corresponding SQL statements.

The presentation of the HTML file and its data can be customised using the Portal Settings POF Template and RFQ Template.

Below is a sample of a data customisation file:

```
<?xml version="1.0" encoding="UTF-8"?>
<ebusinessdirect>
<amos version="1" author="John Smith" created="20080228" company="CompanyA">
```

```
</amos>
<purchaseorder>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</purchaseorder>
<quotation>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</quotation>
</ebusinessdirect>
```

HTML/JSON

Setting the HTMLType definition to HTML/JSON produces an HTML file containing a JSON data island. This requires JavaScript to be enabled within the browser and is supported by most major web browsers, including Microsoft Internet Explorer.

> **Note:** When using the HTML/JSON option to generate HTML documents: when the supplier sends the information, the email produced containing the information to be sent back is presented editable to the user filling in the HTML page. No changes should be made to the content of this email, as this would render the information useless.

Customisation: Data and Presentation

You can customise the content and number of data islands using the Portal Setting **XML Configuration**. This setting points to an XML file containing the definition of all data islands, their names and corresponding SQL statements.

The presentation of the HTML file and its data can be customised using the Portal Settings **POF Template** and **RFQ Template**.

Below is a sample of a data customisation file:

```
<?xml version="1.0" encoding="UTF-8"?>
<ebusinessdirect>
<amos version="1" author="John Smith" created="20080228" com-
pany="CompanyA">
</amos>
<purchaseorder>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</purchaseorder>
<quotation>
<dataisland name="MyData">
<sql>
SELECT code, name FROM address WHERE code LIKE 'j%'
</sql>
</dataisland>
</quotation>
</ebusinessdirect>
```

JSON Library

Processing JSON data requires a JSON library. Several libraries are available on the Internet. For example, one such library may be found at:

http://ajax.googleapis.com/ajax/libs/jquery/1.3.2/jquery.min.js

The selected library must be made available for the HTML file - either by referencing a URL or by including the library directly into the HTML file itself. To specify a library, use the Portal Setting **JSON Library**, which lets AMOS know how the selected library should be linked to the HTML file. There are three values available when defining this setting:

- **INTERNAL** - uses the java script code found internally within AMOS, and inserts it into the HTML file. This increases the size of the HTML file.
- **URL** - links the URL you provide here, into the HTML file; this will not considerably increase the size of the HTML file.
- **FILE** - takes the java script code contained in the selected library file, and inserts it into the HTML file. This increases the size of the HTML file produced according to the size of the selected file. You indicate the location of the library file here. Keep in mind that AMOS does not verify the content of the file - it is inserted as it is.

HTML/No Script

Setting the HTMLType definition to HTML/NoScript produces an HTML file with no data island which therefore do not rquire the web browser to execute any java script. This is supported by most major web browsers, and does not require JavaScript to be enabled within the browser. The resulting HTML file will not be expanded by any data island as in the two previous scenarios. Because this new format does not contain any java script it is also readable on smart phones like Blackberries and iPhones.

For security reasons some users might switch JavaScript functionality off.

Note: When using the HTML/NoScript option to generate HTML documents: when the supplier sends the information, the email produced containing the information to be sent back is presented editable to the user filling in the HTML page. No changes should be made to the content of this email, as this would render the information useless.

Customisation: Data and Presentation

To produce HTML files of this type, all the necessary data is populated into 'Table Tags'. This tells AMOS where to insert the data in the HTML file. There are two ways to load data into the HTML file.

- Use the portal setting **XML Configuration** in combination with a template file specified in the **POF Template** or **RFQ Template** portal settings. Or,
- Insert AMOS-specific tags into the template file specified in POF Template or RFQ Template with or without the use of the XML Configuration setting. To insert a tag with use of the XML Configuration setting, be sure to define that portal setting, first. Note that AMOS is not case sensitive regarding these tags, but due to HTML standards it is recommended to type 'amostabledata' and 'amoscolumnid' in lower case.

amostabledata

This tag identifies the source of the data. Set it to either the same name as defined in the XML Configuration file or, to an SQL select statement.

amoscolumnid

Within the SQL select statement there are one or more columns identified numerically - 1, 2, 3 etc.

The amoscolumnid tag identifies the column number of the SQL select statement already set in the amostabledata tag. If that tag points to a name in the XML Configuration file, look for the SQL select statement in that file. Otherwise, the amostabledata tag is the SQL select statement.

To insert a column in the HTML file, set the amoscolumnid tag to the numerical value of the column in the SQL select statement.

Example: in the following SQL select statement, 'code' is 'amoscolumnid'='1' and 'name' is 'amoscolumnid'='2'.

```
'SELECT code, name FROM address WHERE code LIKE 'j%'
```

The order of the presented columns does not need to follow the numerical value of the column ID.

The presentation of the HTML file and its data can be customised using the Portal Settings **POF Template** and **RFQ Template**.

If your HTML file collects data from multiple sources - that is from several SQL select statements - all the table tags must be contained within one main table tag.

Condition Based Maintenance

When Condition Based Maintenance (CBM) is in use maintenance jobs can be initiated in response to a warning or alarm level reached on a piece of equipment. Any or all planned maintenance jobs can be activated prior to their normal due date, as dictated by the deterioration of the equipment. AMOS does not know when a CBM signal will appear so it doesn't create work orders for such jobs in advance but rather as required.

The principle behind the CBM module is to stop a trend before the alarm level is reached. Since the CBM module is designed to provide a signal prior to the alarm level, maintenance periods can be stretched as far as possible without endangering the equipment.

The CBM solution is based on the transfer of special 'Condition Monitoring System' files between any number of External Condition Monitoring Systems (ECMS) and AMOS. The ECMSs write these files to a shared, designated CBM folder, which AMOS regularly scans for incoming files at pre-defined intervals. As CBM files are found, AMOS processes the files and:

- counters/measure points are automatically updated or,
- jobs are activated and appear in a check-list or work order printout regardless of their normal schedules.

To set-up and run a CBM solution:

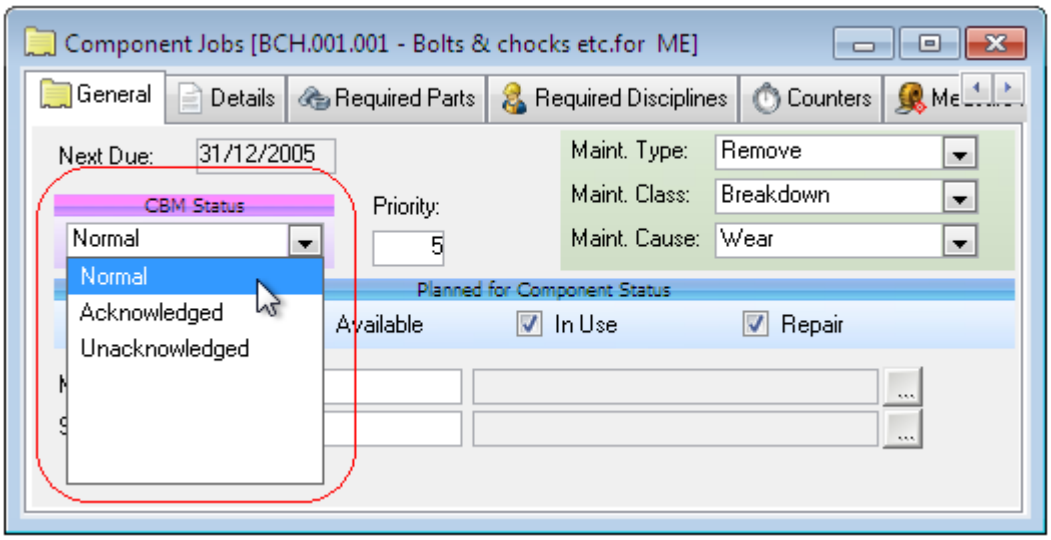
1. Designate a CBM directory and set the related parameters. "Designating the CBM Directory" on the facing page.
2. Define CBM references. See "Defining CBM References" on page 258.

Once AMOS has retrieved a list of import files to process, what happens next depends on the type of file:

- For CBM, see "CBM Day Files" on page 258
- For CBM Alarm, see "CBM Alarm Interface" on page 259.

CBM Jobs

All jobs registered in the AMOS Business Suite have an attribute called **CBM Status**.



There are three possible statuses:

Normal	The job is not CBM-active, and has been included in the maintenance plan according to its schedule.
Acknowledged	CBM-active jobs that have been issued.
Unacknowledged	The job is newly created by job activation signals from an ECMS. The status stays until the job is included in a maintenance printout, or manually reset.

General CBM status in shown by the CBM state indicator at the bottom right-hand corner of the screen: it's red if there is a single job withstatus Unacknowledged. If there are no unacknowledged jobs but some are Acknowledged, then the indicator is yellow. Otherwise, green means there are no pending CBM jobs.

Designating the CBM Directory

To exchange CBM files, you need to designate a shared directory where the ECMSs can drop the files, and AMOS can retrieve them. The directory needs to be on a file server which is accessible to all the systems in use:

1. Go to **Tools > Configuration > Parameters > Directories**.
2. Select 'CBM Directory'.
3. Lookup the folder(s) on the installation hierarchy. The default setting is the CBM sub-folder in the AMOS installation directory.
4. **Save** and close the window.

The frequency at which AMOS should check the folder for incoming CBM files is controlled by another parameter:

Tools > Configuration > Parameters > Options > Maintenance > Seconds Between each CBM Check. The value in seconds (default, 180) is the frequency at which the system will check for CBM activity.

Some other parameters you may want to consider are:

- **Options > General > Default Settings > Initial CBM Work Order Status**. Work order initial status when CBM is in use.
- **Options > General > File Extensions**. Set the file extensions used in AMOS.
- **Options > General > Maintenance > Auto-Filing Of Work Orders > Auto-File Completed CBM Work Order**. Set to TRUE to file completed CBM work orders automatically.
- **Options > General > Maintenance > Auto-Filing Of Work Orders > Auto-File Controlled CBM Work Order**. Set to TRUE to file controlled CBM work orders automatically.

Defining CBM References

Each line of information in a CBM day-file contains a code identifying the measure point from which the data was read. To match the measure point code with the correct components, jobs and/or counters in AMOS, the system needs a 'look-up' or reference table.

To define a CBM reference:

1. Go to **Tools > Configuration > CBM References**.
2. Click **New**.

   Enter an **ID**. This is a two-character code identifying which ECMS the entry applies to. The ID is part of the file extension used during import.

   Give the entry a number in the **Code** field. This is the ID for the measure point/job in the ECMS.
3. Lookup the **Component** whose counter is to be updated, or whose CBM work is to be activated, or both.
4. Select a **Type** of reference from the drop-down - counter update, measure point update or job activation. The field beside the type changes according to your selection:
   - If you selected 'Measure Point', lookup the function with the measure point for CBM updating attached.
   - If you selected 'Job' to activate CBM work, lookup the component job to be triggered.
   - If you selected 'Counter' lookup the counter to update.
5. **Save** the reference.

This table is global and contains references to components in any or all installations and departments.

You can add multiple entries for the same CBM reference, so a single signal from the ECMS will activate any number of jobs or update any number of counters for various components. The same component may appear in several references for activation of multiple jobs and multiple counter updates.

CBM Day Files

Each CBM day-file contains the information accumulated in one day from a single ECMS monitoring system: the IDs of measure points or values which have either reached a pre-defined CBM-active threshold, show an unwanted trend or simply have updated measure point information.

Day-files are named after the date when written and include the system code (CBM ID) that shows you which ECMS the file came from.

Here are some example day-file names:

20161109.%NC - a day-file produced by a NorControl (NC) ECMS on Nov 9 2016

20161109.%SP - a day-file produced by a SPM (SP) ECMS on Nov 9 2016

Each day-file contains the CBM information accumulated for a single day from a single monitoring system. When this system needs to register additional information for the same date, it must append this data to the same day-file. Since day-files created by systems from different suppliers have different extensions, they can co-exist in the same CBM directory without conflicting with each other.

After AMOS scans the CBM directory and finds files to process:

1. AMOS reads the lines in every day-file and finds an entry in the CBM Reference window for each one, matching it to one or more components in the system.
2. Maintenance work is flagged as CBM-active and/or counters are updated with new values.

As day-files are found, they are processed and deleted if the operation went without error. Otherwise, they are renamed to prevent the system from attempting to process them again and the user is alerted.

The following examples are all valid CBM day-file entries:

- MAIN_EXH_VALVE
- TEMP_POINT_3
- +10.5,DIESEL_GEN_1
- =53.25,MAIN_COMPRESSOR
- =1054H,PACKING_MACH_1

The first two lines above are signals from the monitoring system that related CBM jobs needed to be carried out. The third line specifies that 10.5 be added to the counter registered for the measurement code DIESEL_GEN_1. The next line sets the counter for MAIN_COMPRESSOR to 53.25 (using the default counter which is Hours). Finally, the last line also sets the total value of the Hours counter, this time updating the PACKING_MACH_1 counter to 1,054 hours.

CBM Alarm Interface

AMOS CBM can communicate with any ECMS (External Condition Monitoring System) to process alarms. The communication between the two systems is performed by exchanging files of a predefined format. Both systems update the same file. AMOS will also store the file information in the database for later reference.

1. An ECMS generates an alarm.

   If the alarm is determined valid it is marked for export and then exported.
2. The AMOS CBM module receives information about the alarm. A work order is generated based on this information.
3. AMOS exports the work order information.
4. The ECMS imports the work order information, and the alarm is locked.
5. AMOS users process the work order and mark it as completed. Notification of the work order's status is exported.
6. The ECMS imports the work order information and the alarm is unlocked.

Files Sent to AMOS

Files coming from an ECMS sending to AMOS end with the extension 'toamos' and include the system code that shows you which ECMS the file came from.

```
<Anything>.<ECMS>.toamos
```

For example, for SPM Instruments <ECMS> is SPM.

These '.toamos' files are deleted after a successful import. The file content is logged in the table ECMSLog. If an error occurs, the file will be renamed to:

```
<anything>.<ECMS>.toamos.error
```

and the error will be written to an Error 'key'.

Files sent To AMOS contain the following information in the [Alarm] section:

Key	Description	Mandatory	From
CBMID and CBMCode	Those two values identify for which component and job a work order must be created. (Must be defined in CBM References).	Yes	ECMS
ECMSIdentity	Not used by AMOS, but is used by the ESMC to identify the alarm.	No	ECMS
WOCause	This text will be placed in the Work Order Cause column, if work order column is empty. The existing value will not be replaced.*	No	ECMS
Error	Error message, if any from AMOS.*	No	AMOS

*String without carriage return

Following is an example of a file To AMOS (from ECMS):

```
[Alarm]
CBMID=AA
CBMCode=001
ECMSIdentity=100000012
WOCause=The ball bearing is vibrating to much
AlarmDate=20070430120159
```

Files Sent From AMOS

Files sent from AMOS to an ECMS end with the extension 'fromamos' and include the system code that indicates which ECMS should be searching for the file.

```
<Anything>.<ECMS>.fromamos
```

For example, SPM/CondMaster must regularly search for files ending with '.spm.fromamos'.

Files sent From AMOS contain the following information in the [Workorder] section:

Key	Description	Mandatory	From
ECMSIdentity	Not used by AMOS, but is used by the ESMC to identify the alarm.	Yes	AMOS
WorkOrderID	Primary key in the work order table for AMOS.	No	AMOS
WordOrderNo	The work order identification.	Yes	AMOS
Created	Date time when work order was created.	No	AMOS
WorkOrderComment	Work order Action Taken.	No	AMOS

Following is an example of a file From AMOS:

```
[WorkOrder]
ECMSIdentity=100000012
Workorderid=12000031
WorkorderNo=61/00003
Created=20070525000000000
Completed=
```

Work Order Generation and Completion

A work order generated from the AMOS CBM module will contain the following information:

Cause = ECMSLog. WO CauseAMO

Title = as default in AMOS, job Description Title (as found in the CBM reference)

WoNo = automatically generated work order number

When the work order is completed two fields in the file will be set and sent over to the ECMS:

[Work Order Comment] = Action Taken

[Work Date] = Completed date + completed time

Hand Terminal Interface

A general file format allows AMOS Business Suite to support several standards. To support all hand terminal formats that exist, a converter application is required. One such application is already developed, and its source code is available for developers.

1. Go to **Tools > Hand Terminal Interface**. The Import Hand Terminal File dialog opens.

   The pre-set values are changeable. For example you can change the default department. You can select an .Htd file. Updates.htd is selected by default, found in the Installation Directory.

2. Click **Select Department** button and choose a department. Click **OK**.
3. Click **Select Hand Terminal File** and choose the file to import. You can set the default directory for Hand Terminal Files - see "Directories" on page 110.
4. Click **Read Hand Terminal File** to start the import of data from the selected file.
5. The database updates accordingly. Error messages appear if any error occurs, and all changes in the database are undone.

The application takes two arguments:

- **Directory**. Tells the application where to store the .Htd file. If no directory is specified, it uses the current one.
- **Filename**. Tells the application what name to give the .Htd file. If no filename is specified, it uses Updates.htd.

The application assumes that the hand terminal is connected to the keyboard input port of the PC. Click the **Read from Hand Terminal** button to start keyboard polling. Polling puts the keyboard input focus into a hidden single line edit control, and adds code to the keyup event of that window.

Click the **Stop** or **Close** button to terminate the polling.

The polling stops automatically when the hand terminal unit sends the Termination sequence and an .Htd file is stored with the given name in the given directory.

Verify that the correct data transmits by inspecting the window control at the bottom of the window (DataWindow).

File Format

The supported file format is fairly simple. Hereafter called HTD, it is somewhat similar to the .Ini file format found on the Windows platform.

In general, the file format syntax is:

```
[Section]
Variable = Value
```

The first section in the HTD file is the header, which tells AMOS what version and the number of the transaction that is expected to be found in the .Htd file.

```
[Header]
Version=1
Transaction=X
```

This states that the .Htd file is version 1, the only format AMOS Business Suite currently supports.

The Transaction number is important. This tells how many Transaction sections that are found in the .Htd file.

```
[TransactionX]
PartNo=< Alfa-numeric value >
Type=< in (O, I, C) >
Date=<YYYY-MM-DD>
Quantity=<Numeric value>
O = out of stock
I = insert into stock
C = Stock Count
[TransactionX]
PartNo=< Alfa-numeric value >
Type=< in (O, I, C) >
Date=<YYYY-MM-DD>
```

```
Quantity=<Numeric value>
O = out of stock
I = insert into stock
C = Stock Count
```

You must set the date in the given format.

File Sample

```
[Header]
Version=1
Transactions=2
[Transaction1]
PartNo=AE-100-001
Type=O
Date=1998-02-24
Quantity=1
[Transaction2]
PartNo=AE-100-003
Type=I
Date=1998-02-24
Quantity=12
```

SMS Notifications

You can configure your system to send SMS messages from AMOS to most mobile phones[1]:

- AMOS can automatically send sms messages to a designated user when a record's status is changed using the work flow; and
- AMOS can send sms messages to a designated user to notify him/her if an error occurs when the Task Server is running any import/export task.

This functionality requires a device that is able to communicate with your PC and contains an open and available modem that can transmit sms messages.

To configure SMS Notifications in AMOS:

1. Create a notification task. See "Creating a Notification Task" below.
2. Connect one or more devices. See "Connecting a Device" on the facing page.
3. Define a mobile number on recipient AMOS users. See "Defining Mobile Numbers on Notification Recipients" on the facing page.
4. Adjust the work flow. See "Send SMS via the Work Flow" on page 264.
5. Send messages via the work flow (see "Sending an SMS Via the Work Flow" on page 265); or, set the Task Server to send a message if an error occurs (see "Import/Export Task Error Notifications" on page 266).

Creating a Notification Task

1. Go to **File > Export/Import > Tasks**. Click **New** to create a task.
2. Select **Type** 'Export' and **Format** 'Notification'. Give the task a **Description** like 'SMS Notification'.
3. Set frequencies and make sure to flag the task **Active**.
4. **Save** and exit the window.

[1] The modem inside the mobile device must be accessible by third parties.

Connecting a Device

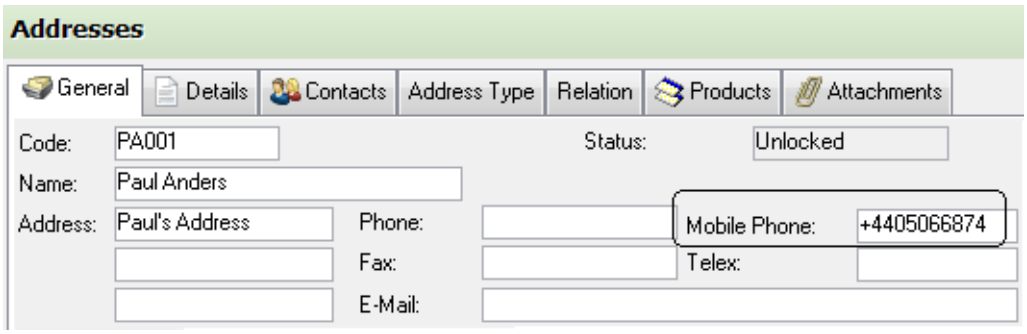
Your PC connects to the mobile device via a COM port - either with a cable or through bluetooth. You can connect multiple devices - as long as the definition for each one references a unique COM port.

1. Connect your mobile phone to the computer. Ensure that Windows detects it, and assigns it a COM port.
2. Go to **Tools > Configuration > Notification > Notification Configuration**.
3. Click **New** to setup a new phone connection. Enter a **Code** and **Description**. Flag the **Active** checkbox.
4. Enter the **COM Port** Windows provided.
5. Click the **Device Identification** button and AMOS will lookup the connected device.
6. Click the **Server Identification** button and AMOS picks up your computer or server name, and so links to the task server which will process the notification.
7. **Save** the entry.
8. The Verify tab contains commonly used preset commands. To check if you are connected, select the command 'AT' from the list and **click Send**.

   The COM port responds 'OK' if the connection is correctly established.
9. **Save** and exit the window.

Defining Mobile Numbers on Notification Recipients

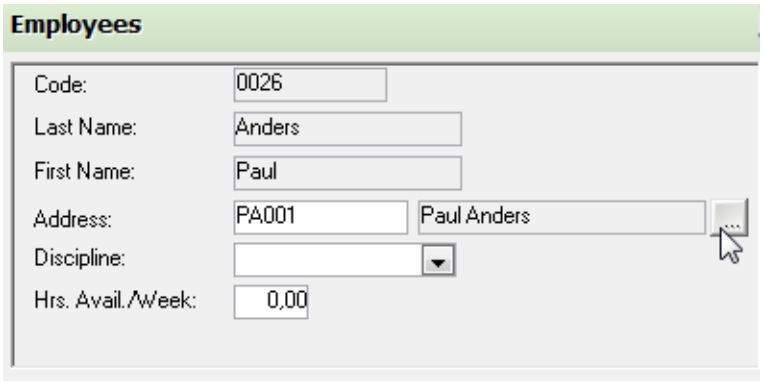
1. Go to **File > Open Register > Addresses**.
2. Select or create an employee address:



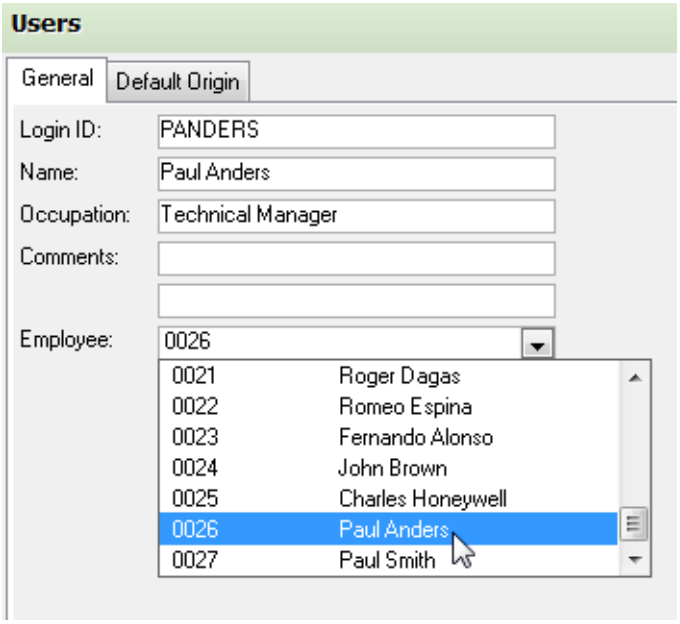
3. Make sure this address has a **Mobile Phone** number. Add one if needed, and **Save** the address.

   Some prerequisites to consider:

   If the address is not already connected to the employee record, go to **File > Open Register > Employees**. Select the employee and lookup the address:



Make sure the employee record is also linked to an AMOS user record, at **Tools > Configuration > Access Control > Users**:

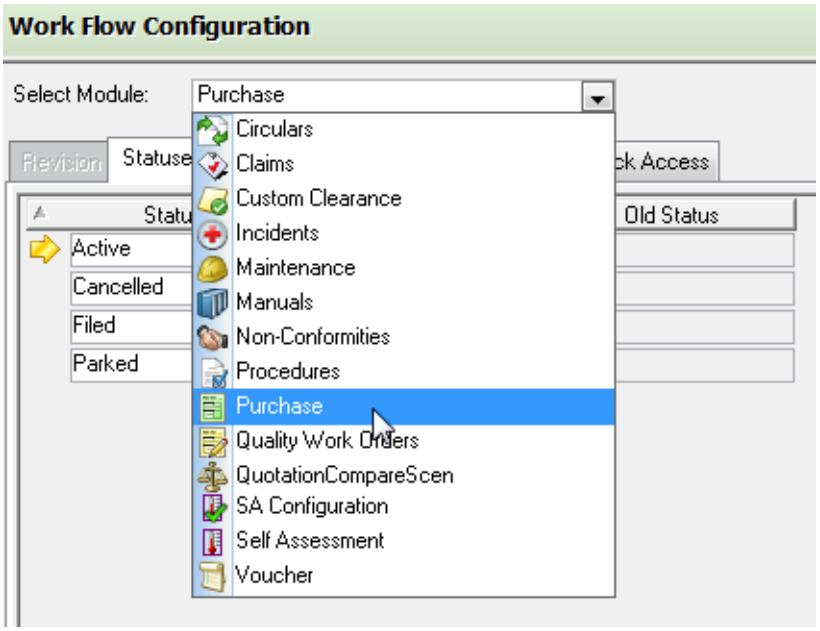


Send SMS via the Work Flow

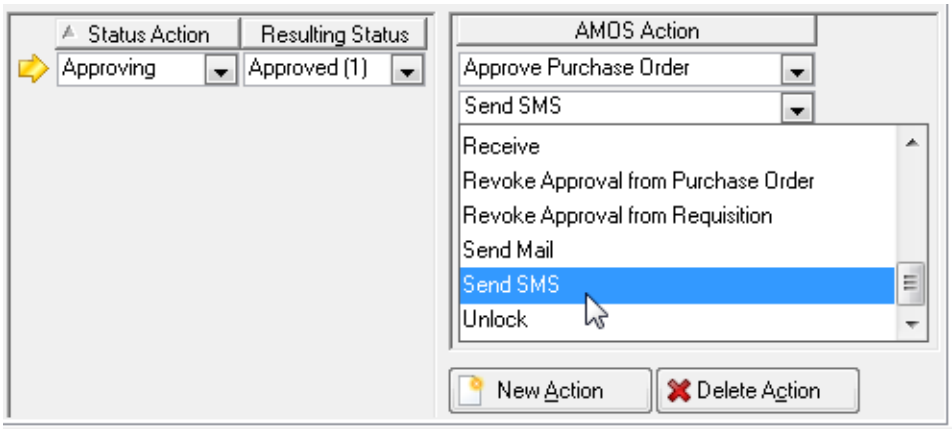
AMOS will automatically send sms messages to the designated user when a record's status is changed using the work flow: for example, when a purchase order is 'approved'.

To allow AMOS to do this, your work flow configuration needs to include the AMOS action 'Send SMS'.

1. Go to **Tools > Configuration > Work Flow**.
2. Select a **Module**:



3. Choose a transformation and then add the **AMOS Action** 'Send SMS' to it:

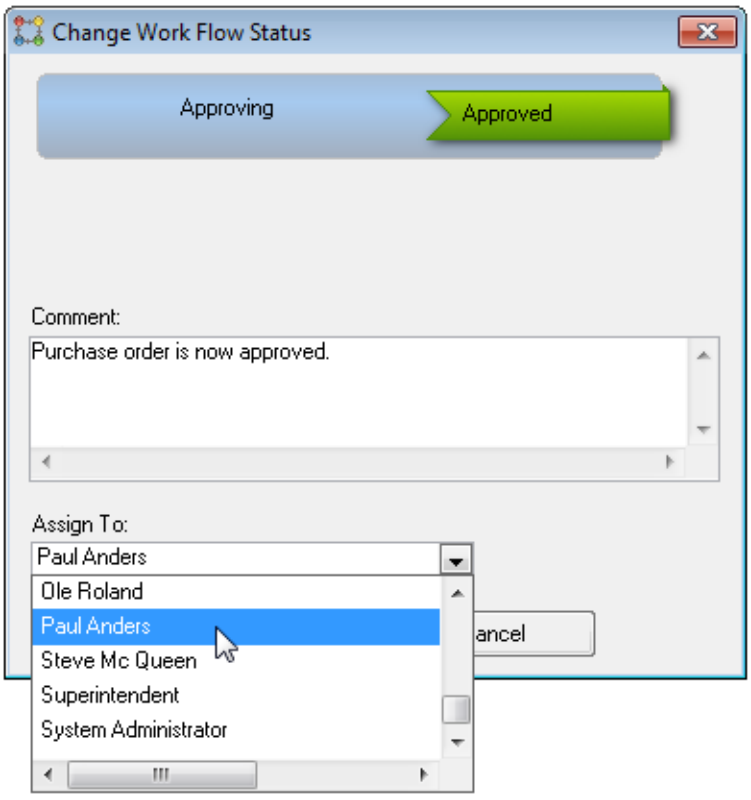


4. **Save** and exit the window.

Ensure that the system parameter controlling work flow for the selected module is activated.

Sending an SMS Via the Work Flow

1. Open a window where the work flow has been configured to send messages.
2. Select a record and go to **Options > Work Flow**.
3. Choose the work flow action which will send an sms.
4. Enter a **Comment**: this is the sms text. There is a 160 character limit.
5. Select the recipient from the **Assign To** list: an AMOS user with a mobile phone number defined on their address record:



6. AMOS carries out the work flow action(s) and sends an sms to the selected user.

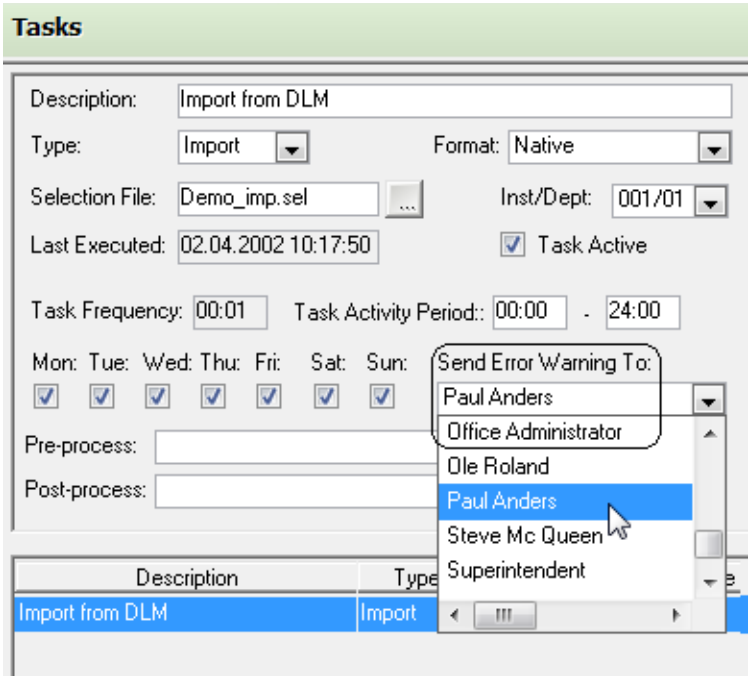
SMS messages are queued on the server, then sent to the connected mobile and transmitted. Once sent to the mobile, AMOS considers the message sent- if there is no service or another problem with the mobile phone AMOS will not notify you.

Note: Limits to this functionality are inherited from your mobile phone. SpecTec recommends you use only English letters in sms messages.

Import/Export Task Error Notifications

AMOS can send sms messages to a designated user if an issue occurs when the Task Server is running any import/export task:

1. Go to **File > Export/Import > Tasks**.
2. Select a task in the Task Server list.
3. Choose a user with a mobile phone number defined on their address record from the **Send Error Warning To** list:



4. **Save** the task.

Remember, a message will not be sent to the user if the issue occurs with the sms notification task itself.

CHAPTER 8

Defining and Using Attachments

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

This chapter includes the following topics:

Getting Started with Attachments 268
Defining Attachment Source Tools 268
Attachment References 269
Source and Reference Definition Example 271
Adding Attachments in AMOS 272
Viewing Attachments 281
Hotspots on Attachments 281

SpecTec

Getting Started with Attachments

To configure AMOS to handle attachments:

1. Define the attachment sources you want to use. See "Defining Attachment Source Tools" below.
2. Build a library of attachment references. See "Attachment References" on the facing page.

   Tip

   See "Source and Reference Definition Example" on page 271 for a sample of an attachment source and reference definition using a DDE command for an external viewer.

3. Once attachment sources are properly defined, users can add files to almost any window in AMOS in several different ways. See "Adding Attachments in AMOS" on page 272.

» (Optional) You can also edit the graphic images to create hotspots; and link the hot spots to other graphic images or data objects in AMOS. See "Hotspots on Attachments" on page 281.

Defining Attachment Source Tools

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

Defining a Source

1. Go to **File > Open Registers > Attachment> Sources**.
2. Click **New** on the toolbar and enter a **Code** and **Name**.
3. Choose a **Service Type**:
   - » **Internal**. The AMOS Internal Viewer opens standard graphic images like BMPs, JPGs, etc.
   - » **External**. Opens files created by any type of program like Word, Excel, Adobe Acrobat, etc.
   - » **Internal Web**. Opens Intranet sites and external websites within AMOS itself.
   - » **External Web**. Opens Internet sites in your default web browser.
   - » **Default Association**. Allows for adding files of any type which are not already listed in the Attachment References library to an Attachments tab, by drag and drop or by lookup to the user's computer. Also allows for importing image files from connected devices like a mobile phone or a scanner.
4. Selecting 'External' service type requires a Start Command which points to the external program which will open the attachment file:

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

   %IMAGE REFERENCE% tells the tool to display the attachment reference as supplied by AMOS.
5. If you know the names and syntax of DDE commands supported by the tool, you can enter one in the **Display Command** field.
6. **Save** the source tool.

Graphics Directory

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

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

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

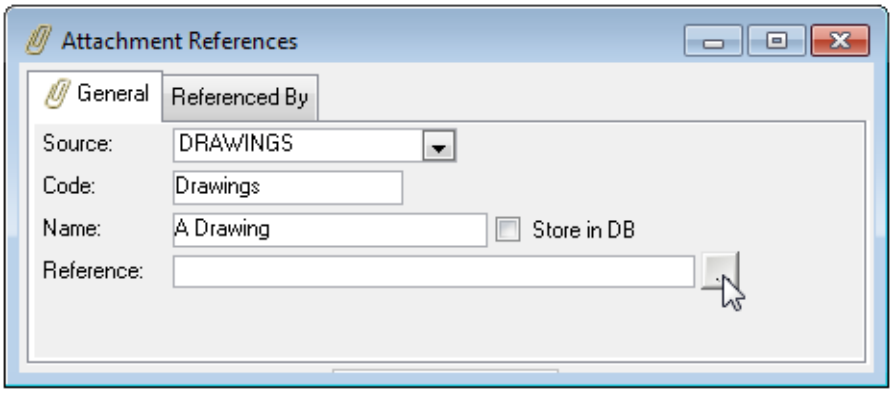
Attachment References

File > Open Register > Attachment > References

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

Adding an Attachment Reference

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

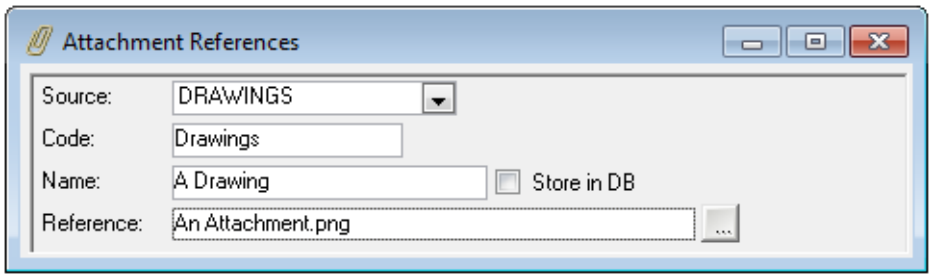


   Or go to **Options > Select File...** to locate it.

   - If you are adding a reference for the **Source** type 'Internal Web' or 'External Web', copy and paste the web address into the **Reference** field and **Save** the record.
   - If you are adding a reference for the **Source** type 'AMOS Titanium' enter the Titanium screen in the **Reference** field and **Save** the record. The reference may contain these constants[1]:
     - :AMOS_CURRENTDEPTID
     - :AMOS_USERID
6. Select a file in the browser and click **Open** to add it.
7. If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[2].
8. **Save** the reference.

[1] Refer to the documentation for AMOS Titanium for usage of such constants, and other details.

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



To open up and see the file, go to **Options > View Attachment**. To remove it click **Delete**.

Deleting a reference here does not remove the attachment file itself from the Graphics Directory. If the attachment file is no longer connected to any record in AMOS and you want to remove it from the Graphics Directory too, go to **Options > Explore File** or click the toolbar button:

 This opens the file explorer to your Graphics Directory and you can delete the file there.

Once an attachment is linked to a record somewhere in AMOS, its location will show up in the Attachment References window Referenced By tab. Double-clicking an entry or selecting one or more and clicking **View** will open the attachment(s) in the entity window at the record to which it is connected[1].

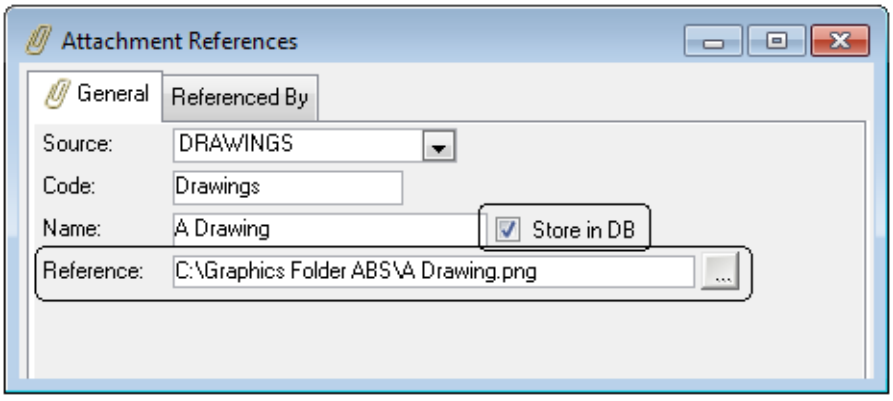
> **T i p**
>
> See "Source and Reference Definition Example" on the facing page for a sample of an attachment source and reference definition using a DDE command for an external viewer.

Storing Attachments in the Database

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

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

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



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

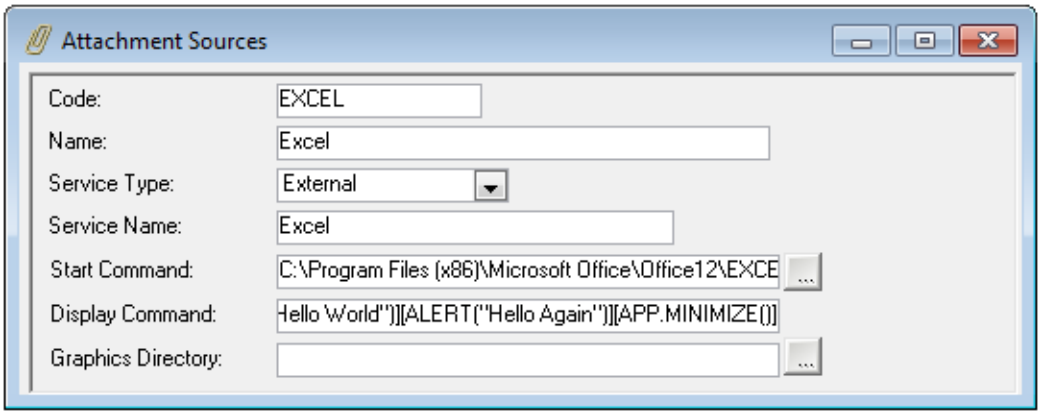
[1] Note that depending on the current installation and sharing, records belonging to another installation will open in global search mode.

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

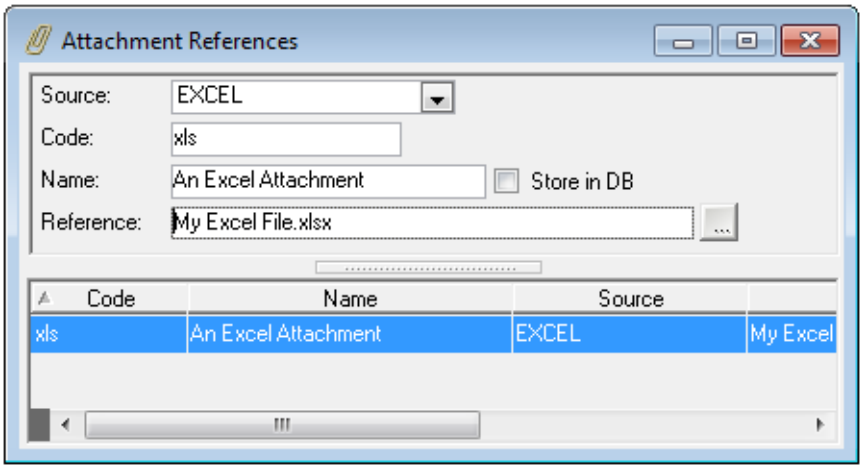
Source and Reference Definition Example

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

1. On the Attachment Sources register, specify:
   - **Code** - Excel
   - **Name** - Excel
   - **Service Type** - External
   - **Service Name** - EXCEL
   - **Start Command** - C:\Program Files(x86)\Microsoft Office\OFFICE12\EXCEL.EXE%IMAGE REFERENCE%
   - **Display Command** - [ALERT("Hello World")][ALERT("Hello Again")][APP.MINIMIZE()]

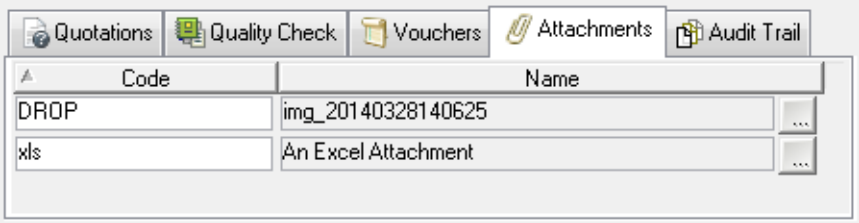


2. **Save** the source.
3. On the Attachment References register, specify:
   - **Source** - Excel
   - **Code** - xls
   - **Name** - An Excel Attachment
   - **Reference** - <an xls file>



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

4. **Save** the reference.
5. Link the reference to an attachments tab in AMOS:



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

When a user views this attachment, AMOS will:

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

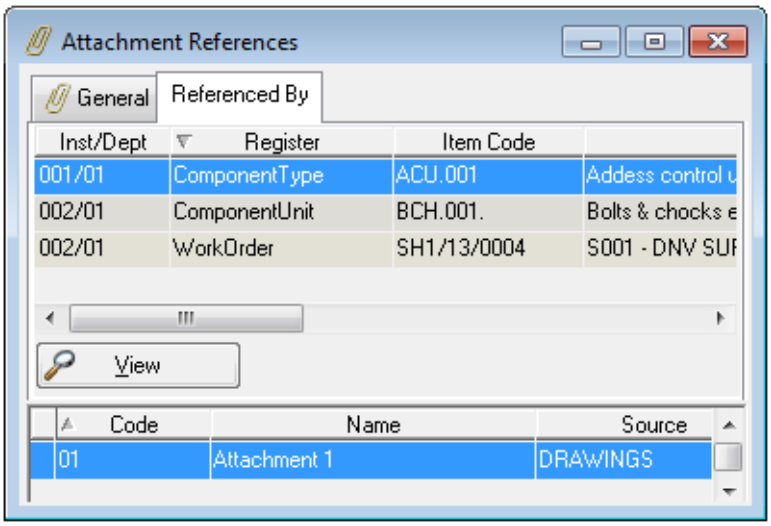
Adding Attachments in AMOS

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

- Add attachments which are already stored in the Attachment References register.
  - Use the **New** button in the Attachment tabs. See "Adding Registered Attachments" on page 275.
- Add attachments 'on-the-spot' (See IMPORTANT, below) . That is, add attachments which are not already registered in the Attachments References library. This creates your library of attachment references as you go:
  - use the **Find File** button to browse on your computer for a file. See "Adding Attachments with the Find File Button" on page 276.
  - drag and drop them onto an Attachments tab. See "Adding Attachments by Drag and Drop" on page 277.
  - import them from a connected device. See "Importing Attachments" on page 279.

Finding Out Where Attachments are Used

Once an attachment is linked to a record somewhere in AMOS, its location will show up in the Attachment References window Referenced By tab:

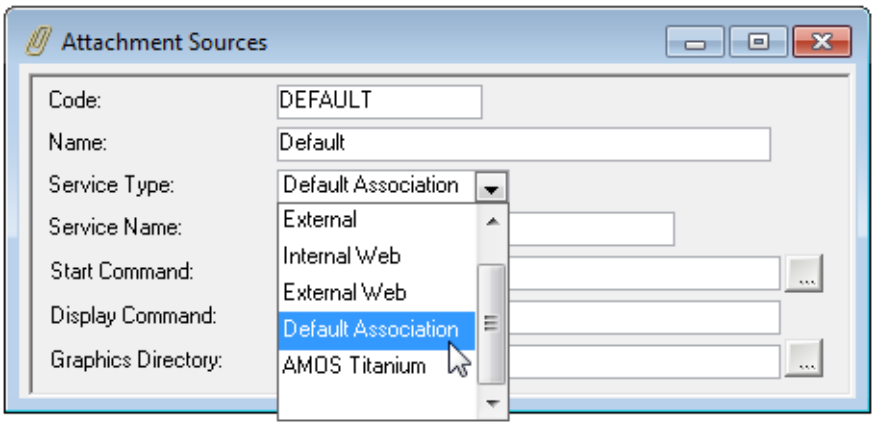


Double-clicking an entry or selecting one or more and clicking **View** will open the attachment(s) in the entity window at the record to which it is connected[1].

> **Tip**
>
> To find out which attachment references have actually been linked to records, filter the Attachment References window and flag one of these options in the filter: 'In Use', 'Not in Use', or 'Both'.

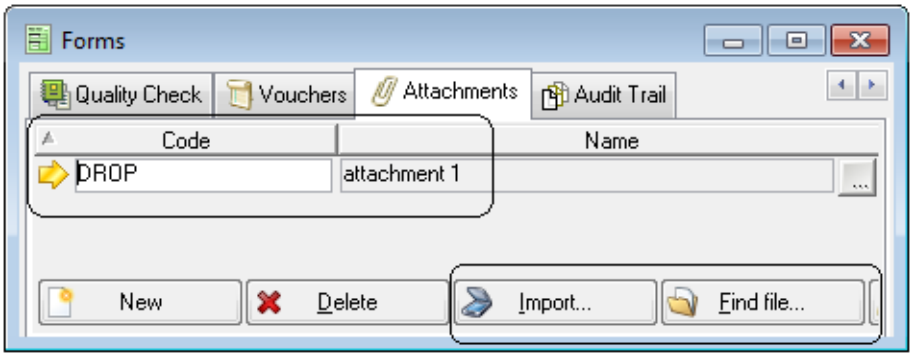
IMPORTANT: About Adding Attachments without a Reference

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

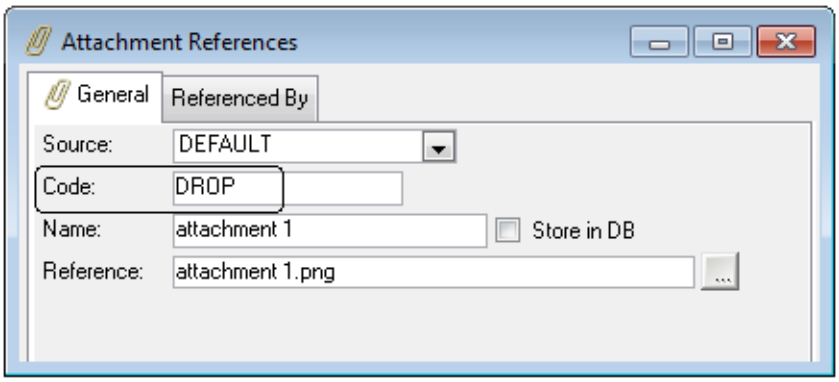


Once the attachment source is saved, users can drag and drop, lookup, or import any file using the buttons on Attachment tabs:

[1] Note that depending on the current installation and sharing, records belonging to another installation will open in global search mode.



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



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

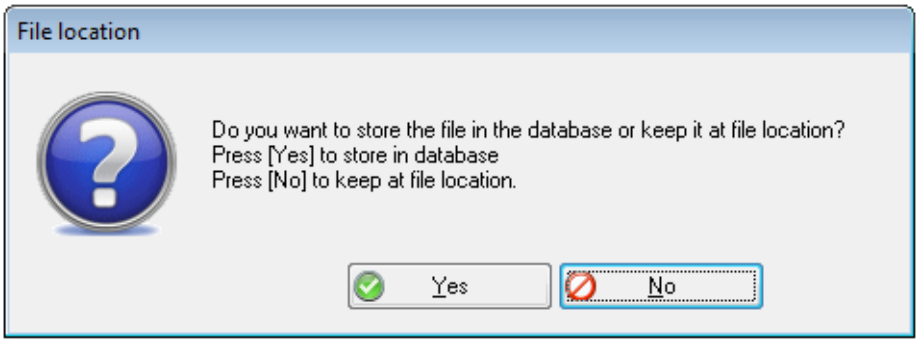
Related Parameters

Every time you add an attachment by 'Find File', drag and drop or import, AMOS considers these parameters.

Attachments Store in Database

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

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

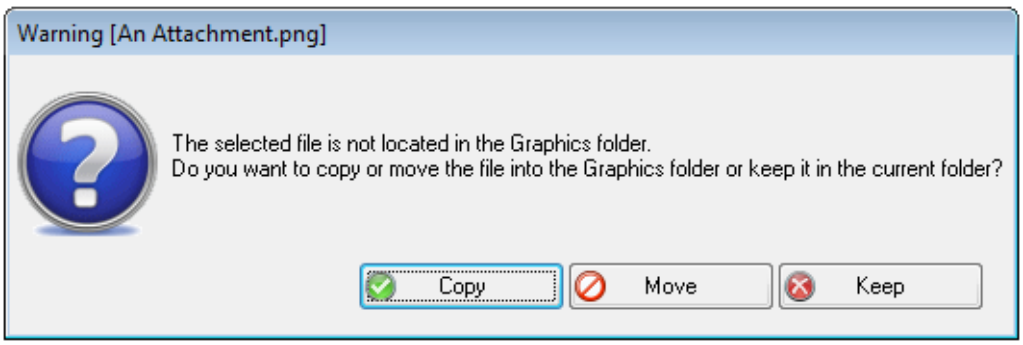


Files stored in the database will have the checkbox Store in DB marked automatically on the associated attachment reference and the file is stored in the ImageFile table.

Attachments File Operation

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

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



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

Attachments Maximum Size

Restricts the maximum size (kb) for all attachments. No value means no restrictions apply.

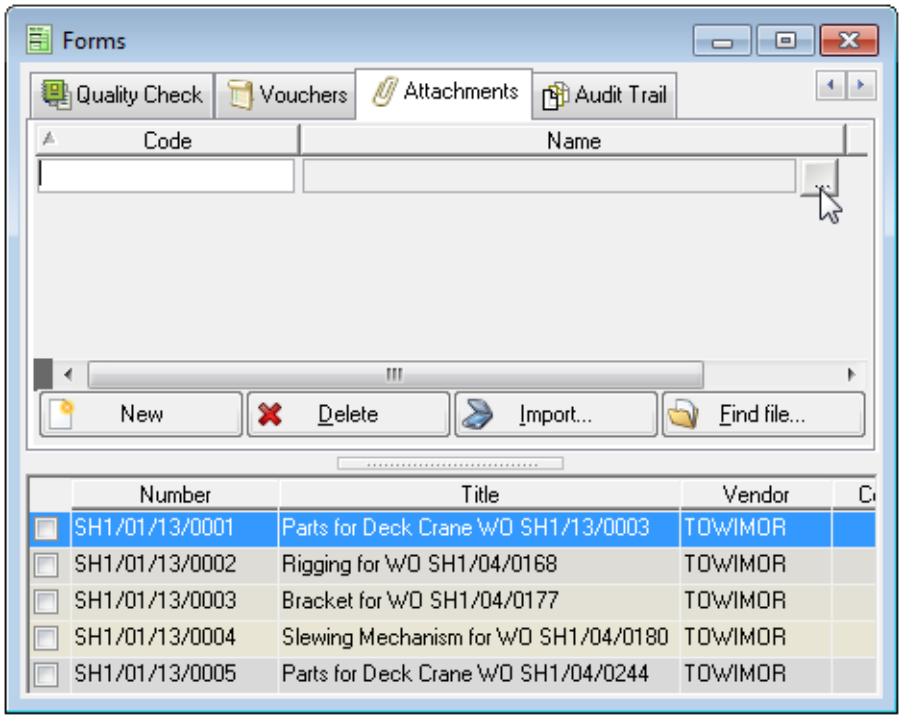
Attachments Oversize Action

Set to WARN, if a user tries to add an attachment which exceeds the size allowed by the parameter 'Attachments Maximum Size', AMOS warns that the attachment exceeds the maximum and allows the user to choose to proceed or not. Set to PREVENT, if a user tries to add an oversize attachment AMOS will not allow it.

Adding Registered Attachments

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

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



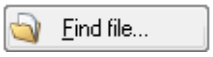
4. **Click OK**.
5. **Save** the window.

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

Adding Attachments with the Find File Button

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

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

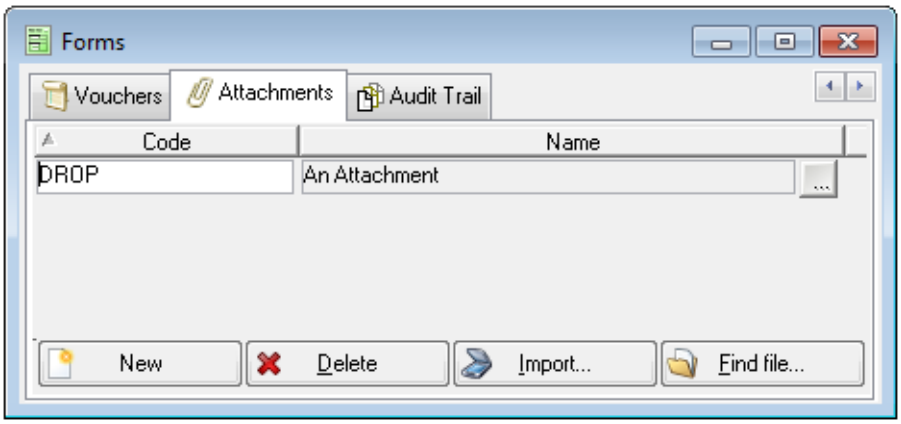
   

3. Browse to and select the file. Click **Open** to attach it.
4. AMOS may ask if the file should be stored in the database or not[2].

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

5. The file is added:

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



6. **Save** the window.

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

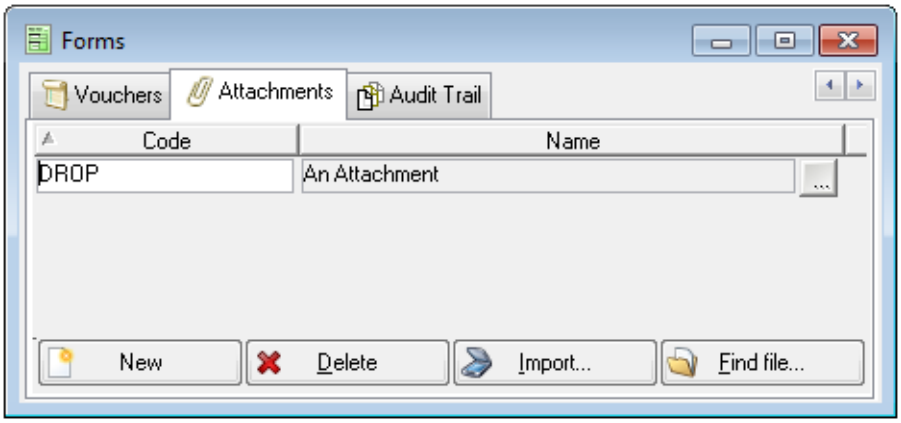
Adding Attachments by Drag and Drop

To drag and drop a file in your system onto an Attachments tab[1]:

1. Open a window's Attachments tab.
2. Find the file in your system. Click on it and drag it to the tab.
3. Drop it.
4. AMOS may ask if the file should be stored in the database or not[2].

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

   The file is added:



5. **Save** the window.

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

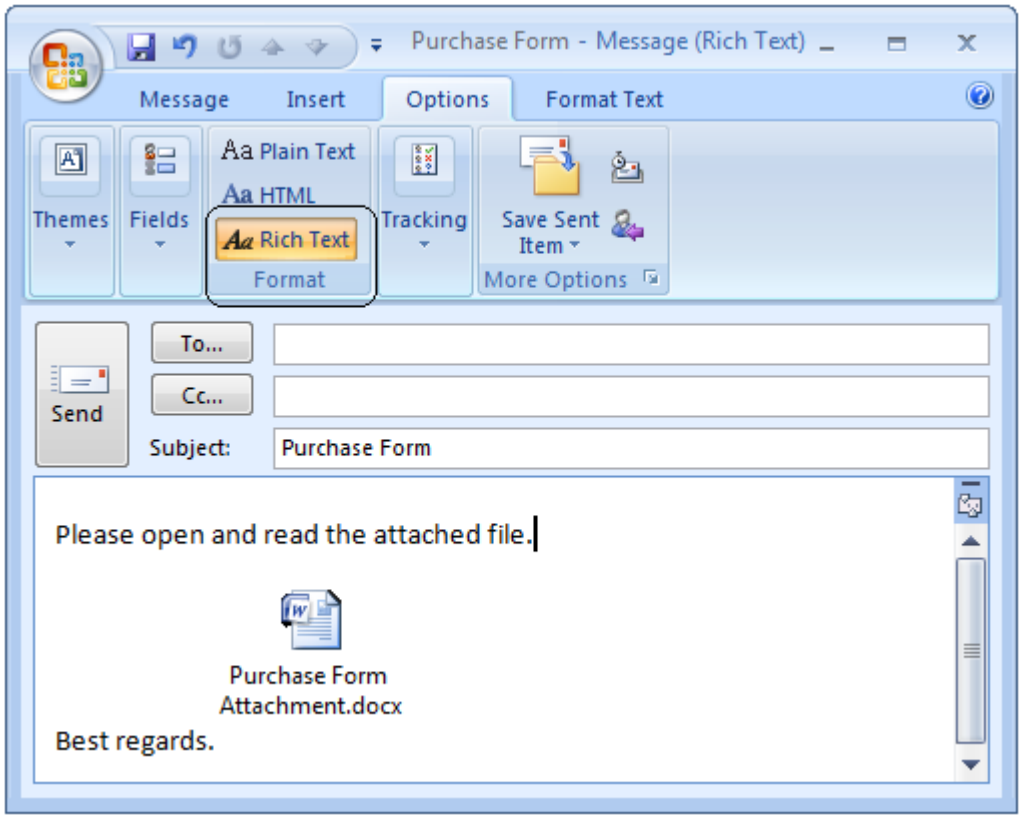
Dragging and Dropping from Outlook

To drag and drop an attachment file from Outlook:

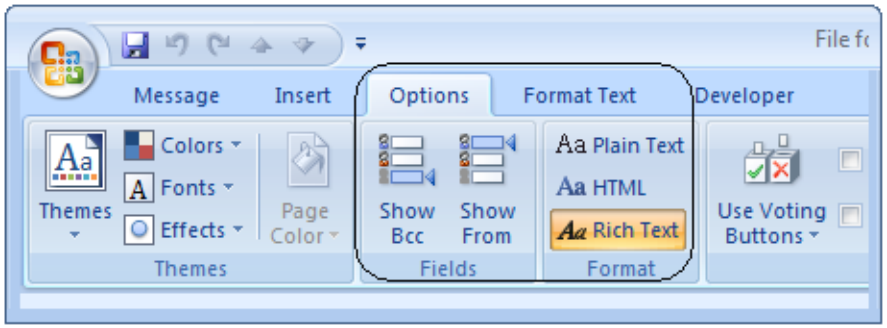
---

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

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



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



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

T i p

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

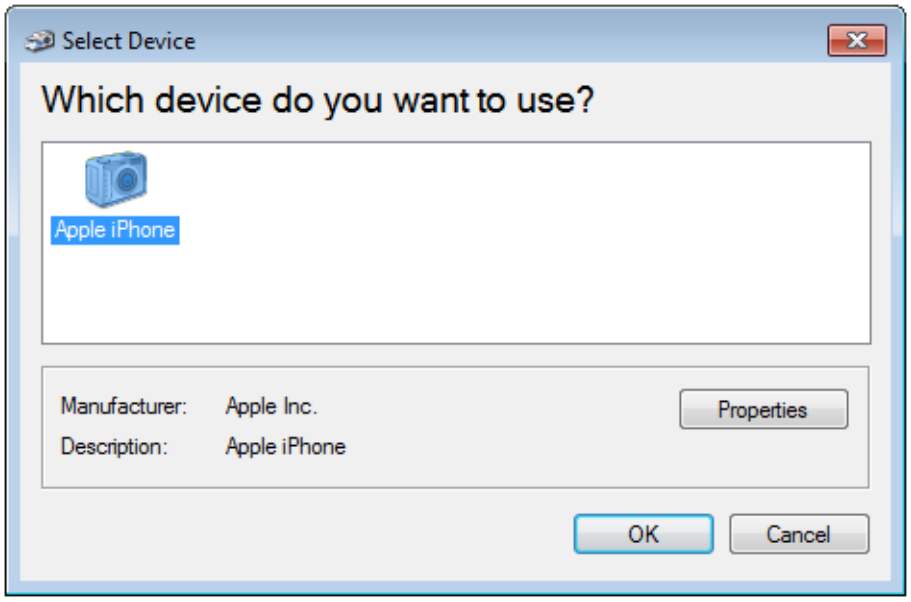
Importing Attachments

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

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



3. A standard Windows dialog appears[2].



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



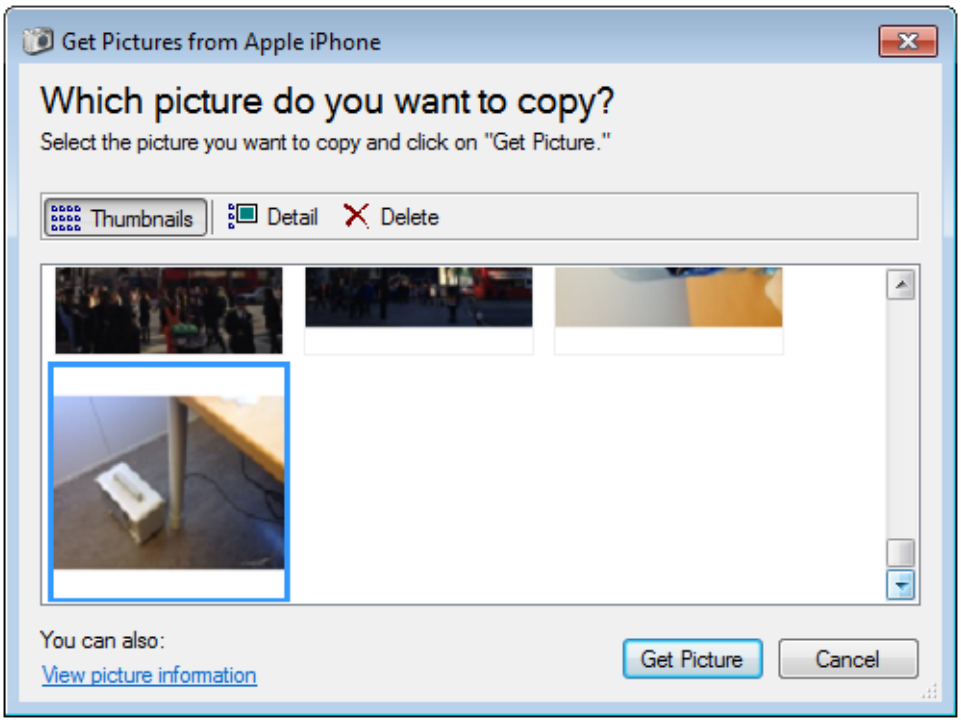
A new dialog opens showing the images on the device.

---

[1] For windows without an Attachments tab, the same functionality applies in the dedicated window opened at Options > View Attachments.

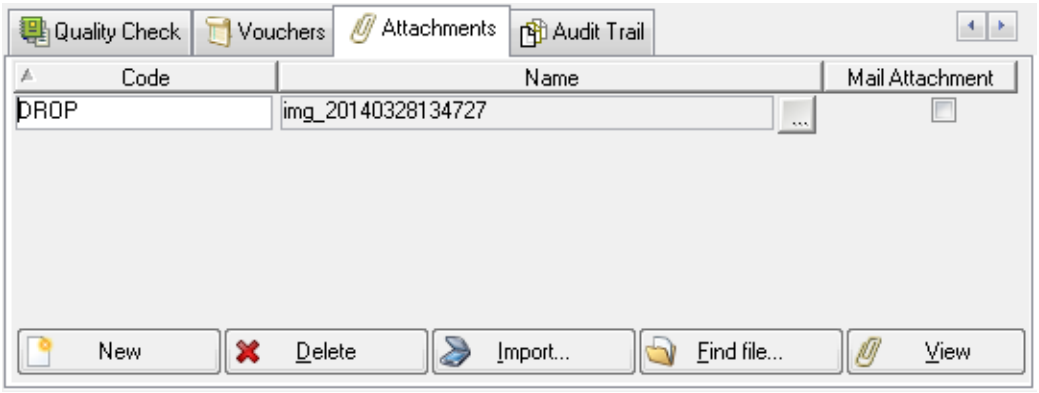
[2] If no device is attached or recognized, you will receive the message that an image could not be acquired.

5. Select one or more images to import and click **Get Picture**:



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

6. AMOS may ask if the file should be stored in the database or not[1].
7. If the file is not already stored in your installation's Graphics Directory, AMOS may ask if you want to copy or move it to the Graphics folder or leave it where it is[2].
   The image is added:



8. **Save** the window.

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

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

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

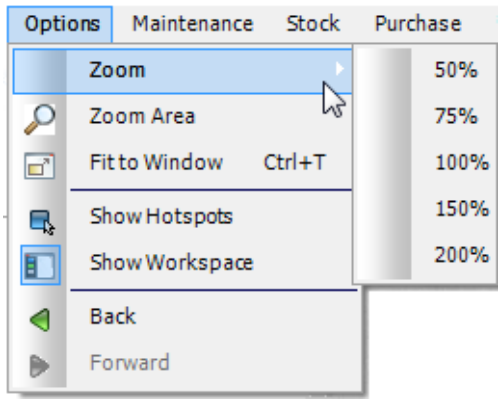
Viewing Attachments

To view an attachment on the screen:

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

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

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



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

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

You can easily tell if a record has a file attached to it, without opening the Attachments tab: there's an Attachments column in the list part of the window and it contains either a 'Yes' or a 'No', depending on if the selected record has attachments or not.

Hotspots on Attachments

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

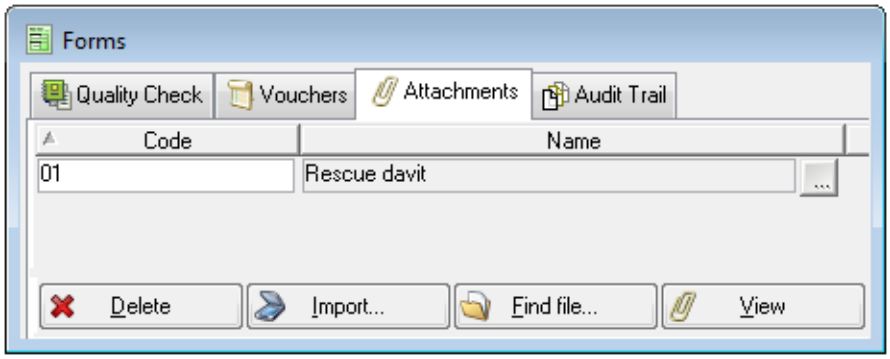
Using hotspots, you can:

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

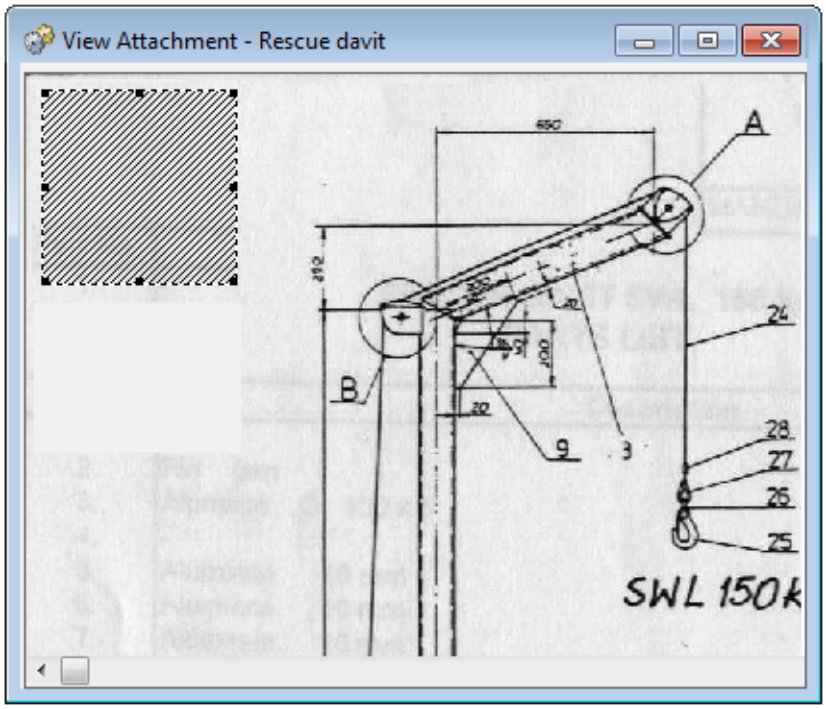
Defining a New Hotspot

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

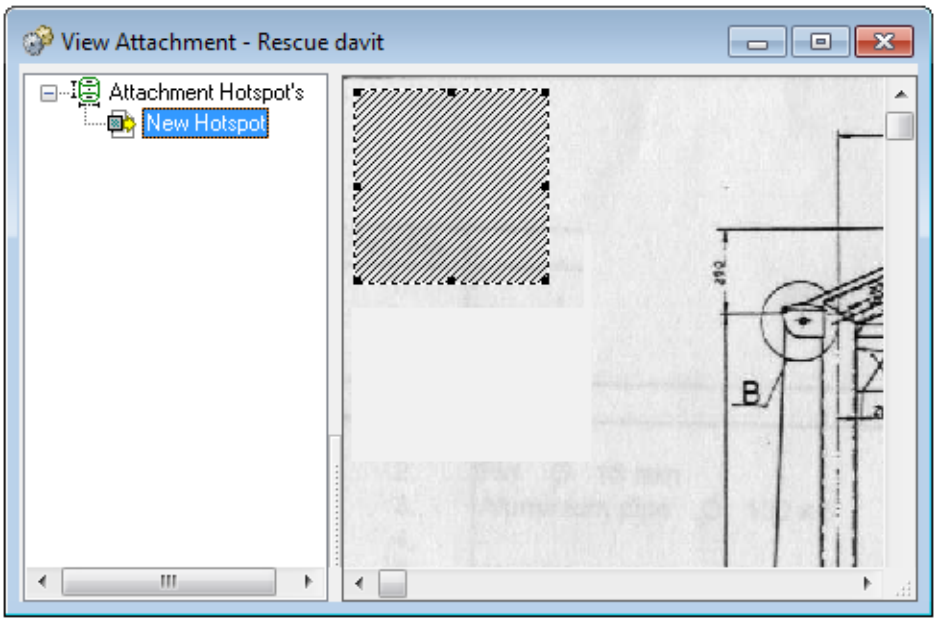
1. Open an Attachments tab in AMOS and select an attachment:



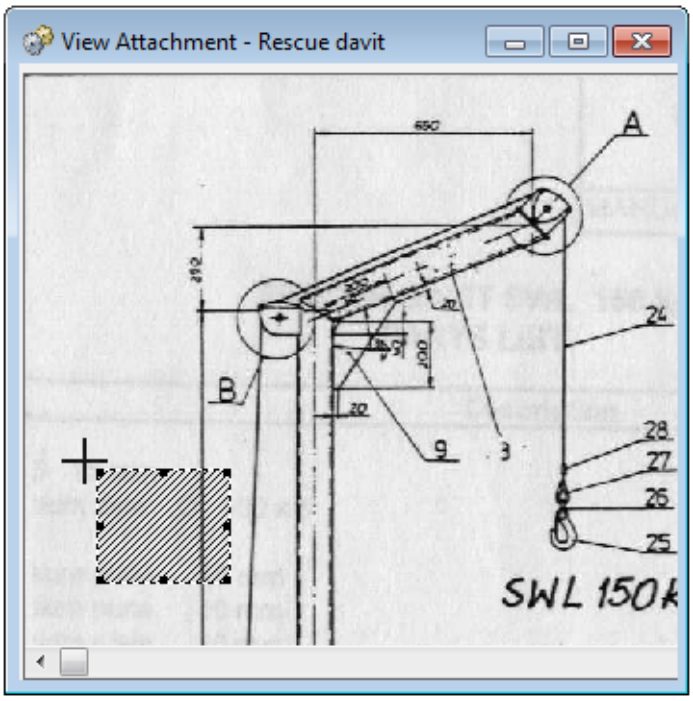
2. Click **View** to open it up.
3. Click the **New** button on the toolbar and a new hotspot appears as a shaded area in the top left corner of the attachment window:



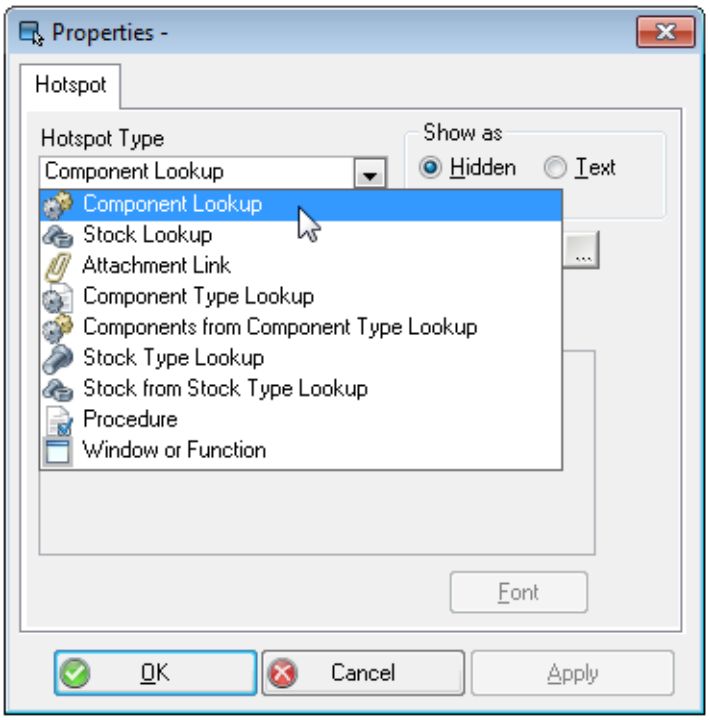
4. Click the **Show Workspace** button at any time to open a panel on the left side listing the new and any existing hotspots:



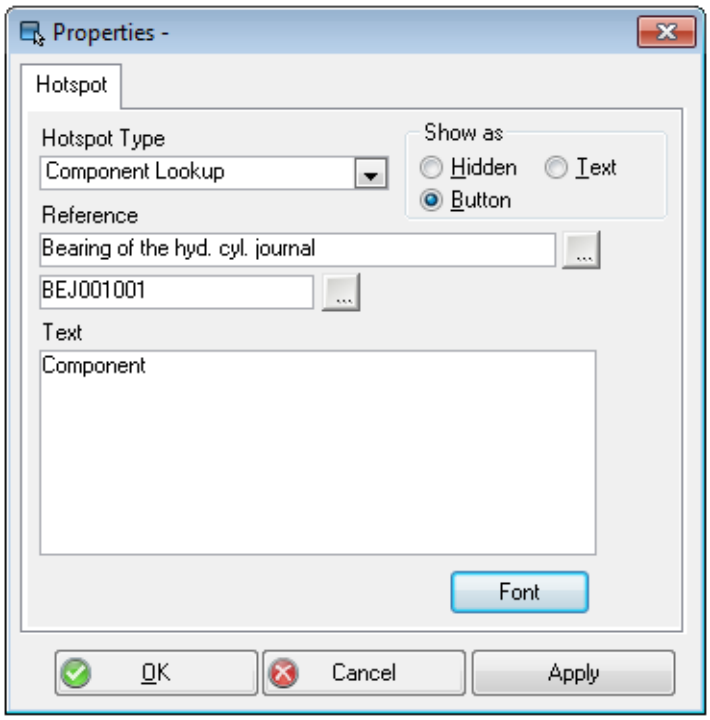
5. Drag the new hotspot to a location on the attachment.
6. Once in place, you can resize it by dragging the handles on the hotspot edges:



7. **Save** the hotpot.
8. Right-click on the hotspot and choose **Properties**.
9. Select a **Hotspot Type** from the drop-down list:

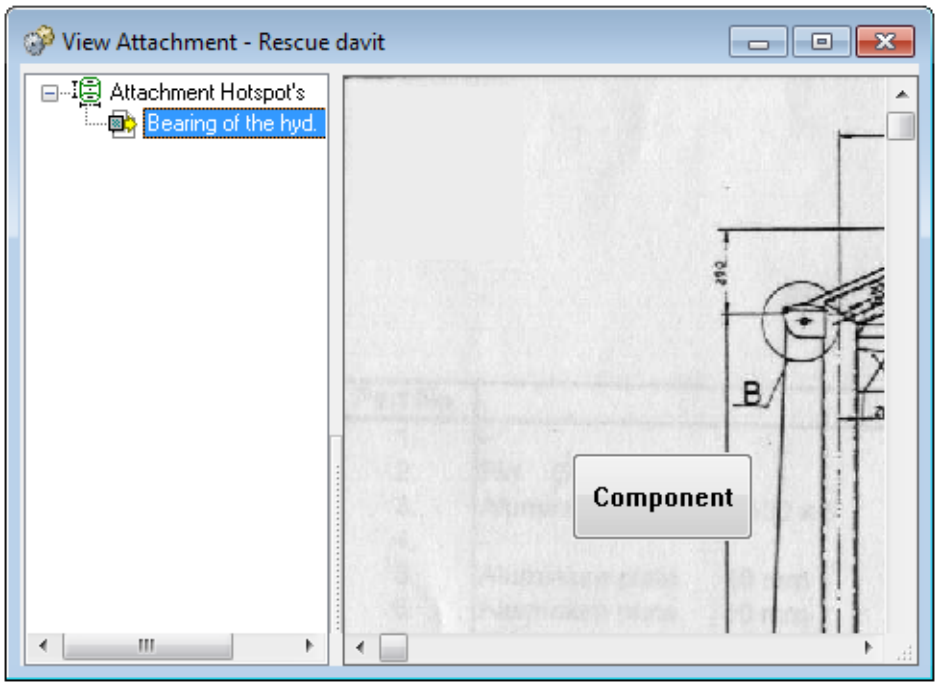


10. Select to show the hotspot at a **Button** or **Text**. You can also select to leave the hotspot **Hidden**. Hidden hotspots are invisible until you hover over it and the cursor turns into a pointing hand.
    - For text, enter the text which will be the hotspot.
    - For a button, enter text to label it.
11. Lookup the **Reference** - the attachment, window, or record in a window, that will be opened when a user clicks on this hotspot:

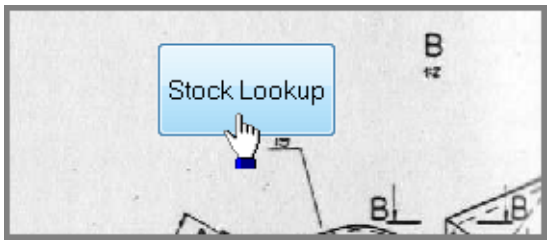


12. Click **OK** to return to the attachment.

13. Click **Show Hotspots** to see the hotspot as it will now appear:



You can create a chain of hotspots connecting as many attachments/windows as you like. When a user opens the attachment and hovers over a hotspot, the hotspot is activated and clicking it will open the linked attachment/window:

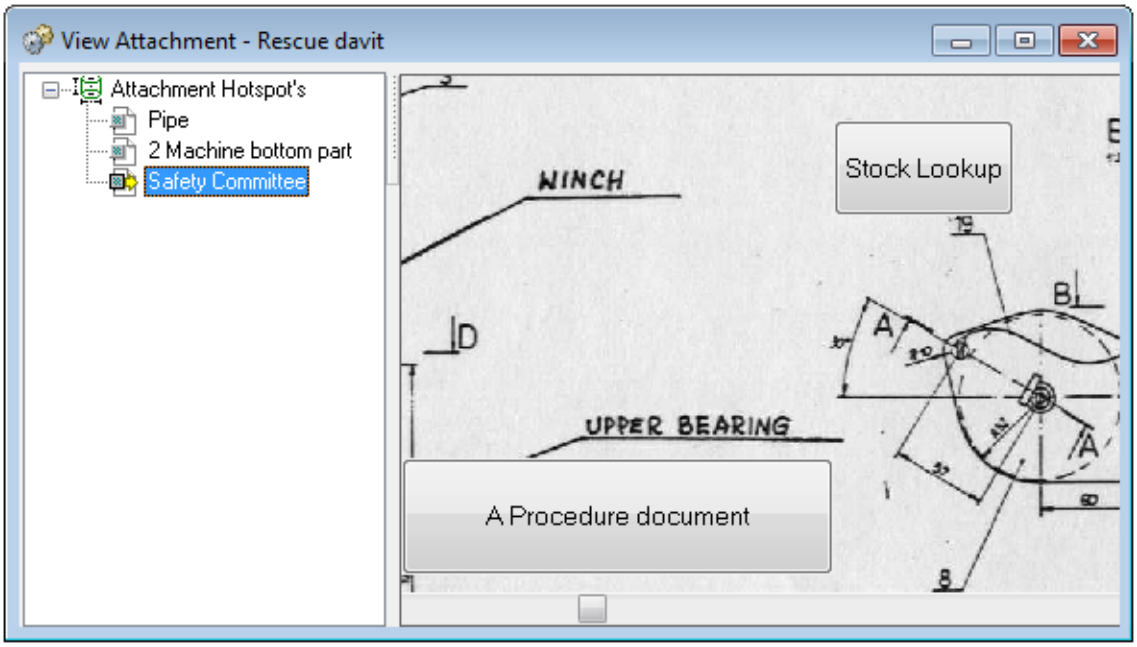


The system parameter 'Open Attachment In New Window' controls what happens when a hotspot for another attachment is clicked on. Set to FALSE, the next attachment replaces the current one in the same window. Set to TRUE, the new attachment will be displayed in a new window.

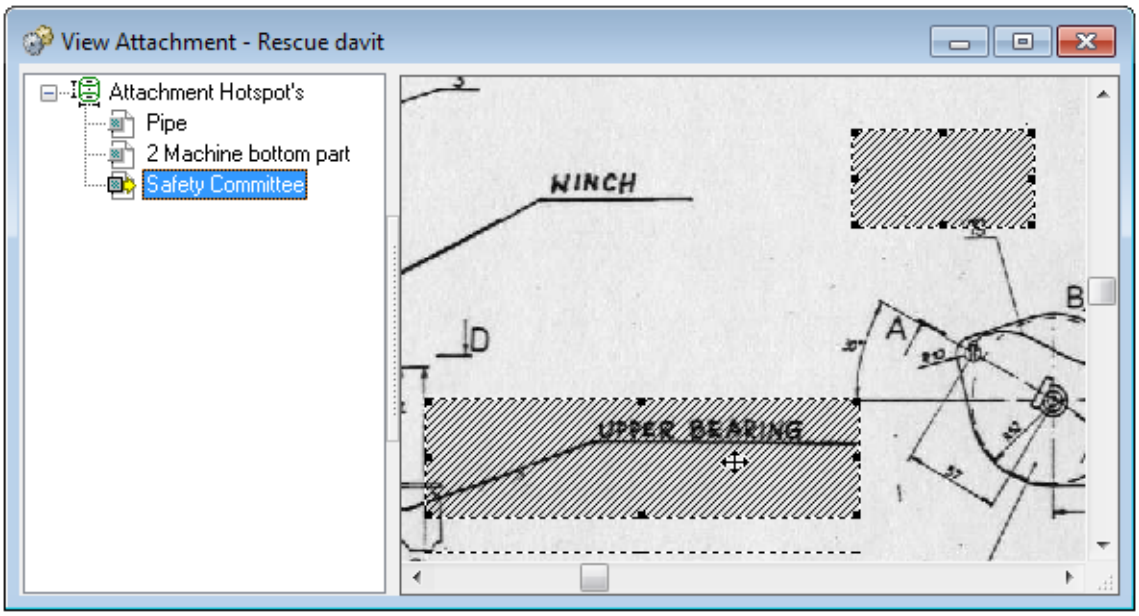
Click the **Forward** and **Back** buttons to browse between opened attachments.

The Attachment Workspace

An attachment can contain more than one hotspot. To keep track of hotspots and their links, click the **Show Workspace** button in the toolbar or go to **Options > Show Workspace** to open a list on the left side:



Click **Show Hotspots** or go to **Options > Show Hotspots** to toggle between showing the hotspots as they appear, and showing them as shaded areas for resizing or moving:



Hovering over one highlights its name in the list on the left side.

CHAPTER 9

Templates and the Form Designer

Assigning templates to Details tabs and Description windows in AMOS makes it easier for users to add the correct data in a faster and more efficient way: when a template is applied, the user will see a form that may contain drop-down lists, selection boxes, input fields and other controls and so on. Using a template, a Details tab or Description window is given the appearance of a specialised input form - otherwise the tab is simply a blank page for free-entry text.

This chapter includes the following topics:

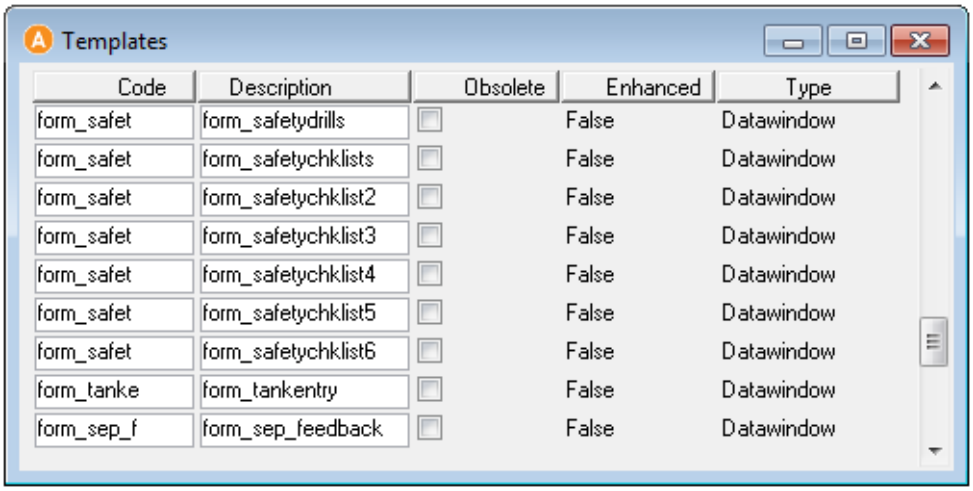
Creating a Basic Template Record 288
Creating a Custom Form 288
Connecting a Form and a Template 291
Converting a Template 292
Default Templates 294

SpecTec

Creating a Basic Template Record

To create a basic template record:

1. Go to **File > Open Register > General > Templates**.
2. Click the **New** button.
3. Enter a **Code** and **Description**.



4. Click **Save**.

To prevent all users from selecting or applying a template, flag the **Obsolete** checkbox.

Creating a Custom Form

There are two ways to create form definitions:

- Using PowerBuilder. Create a form definition (in PowerBuilder terminology this is called a DataWindow), and save it in a PowerBuilder library file with the file extension *.pbl[1].

  See *PowerBuilder* documentation for instructions.

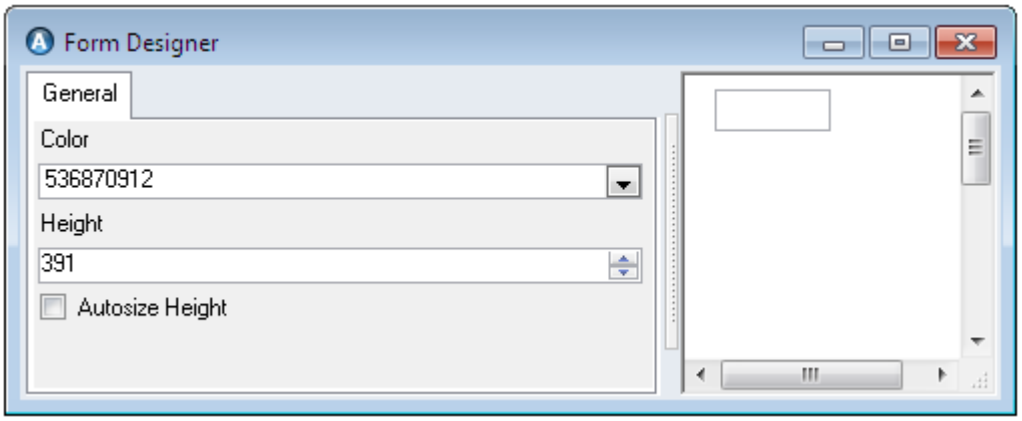
- Using the AMOS Form Designer. Import a datawindow into the Template Register and connect it to a template entry there. This creates a template and the .pbl file is no longer required.

  You can also use the Form Designer to modify the appearance of many (but not all) windows throughout AMOS. In this case, you open the Form Designer from the window you want to modify, by selecting **Edit > User Interface**. See "Customised User Interface" on page 204 for more information.

[1] The name of the file and the name of the datawindow are optional, though a good practice would be to prefix the object with d_ (for datawindow), for example 'd_mytemplate'.

Opening a Form in the Form Designer

Go to **File > Open Register > General > Templates > Options > Form Designer**:



The window opens to a new blank form to which you can add columns and objects. Or, to open an existing form, go to **Options > Open Form**. Select a PowerBuilder Library file (*.PBL) to read in an existing template and modify.

Note: If a form has already been used to input data, do not change it.

Saving a Form

There are two ways to save a form:

- **Options > Save Form**. Saves the modifications to the template in the Library file it was originally stored in (in the case of an existing form).
- **Options > Save Form As**. Allows you to choose another existing Library file or to create one. After either selecting an existing library file or defining the location and naming a new library file, you register a name for the template with which it will be available in the Library file.

Designing Your Form

Go to **Options > Insert** in the Form Designer window to insert different objects into your form.

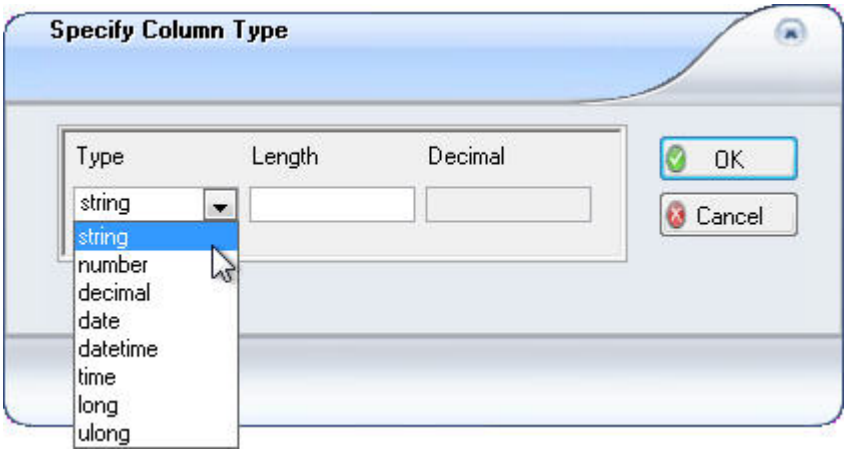
Note: The table_id column is always present on every form by default. Do not delete this required field.

To automatically resize the height of the form according to the content, flag **Autosize Height** in the Position tab.

If you leave the **Moveable** and **Resizeable** boxes in the Position tab flagged, any user can move and resize the selected object on the eventual template.

Adding Columns to a Form

1. Go to **Options > Insert > Column**.
2. Choose the **Type**:



3. When you select the field in the form, you see its properties on the left side.

> **Tip**
>
> To change a column definition, double-click on the column or select it and go to **Options > Edit Column Type**.

Do not change the default **Name** that comes with a new column: AMOS will disregard any new name when it creates the table and will use the default name. The first column you add will be called name_1. If you change this and then create a second column, AMOS will call both columns name_1. Two columns with the same name are not allowed, and AMOS will not be able to create the table.

Define a Tabbing Order

To define a tabbing order[1] for your columns:

1. Go to **Options > Tab Order**.
2. You see a list of all the columns you have added to the template.
3. Enter numbers in the **Tab Order** column.

Hide the Table_ID Column

The table_id column is always present on every form by default. To prevent it appearing on the finished form:

1. Select it.
2. Unflag the **Visible** checkbox on the General tab.
3. Adjust the tab order value for this field to 0.

Add Scrollbars to a Field

If you place a free-text column on the form, to add scrollbars:

1. Select the column.
2. Flag the **Auto Horz/Vert Scroll** and **Horz/Vert Scroll Bar** boxes.

Add a Computed Column

To add a field which performs calculations, insert a computed field:

1. Go to **Options > Insert > Computed Field**.
2. Click in the form to add the field; drag and drop it into place.

[1] The order in which users will move through the fields on the form by pressing the Tab key.

3. Click the **Compute Expression** lookup.
4. Add column names and operators to retrieve a computed value, and click the **Verify** button to test the expression.
5. Click **OK** to exit the dialog.

Aligning Controls

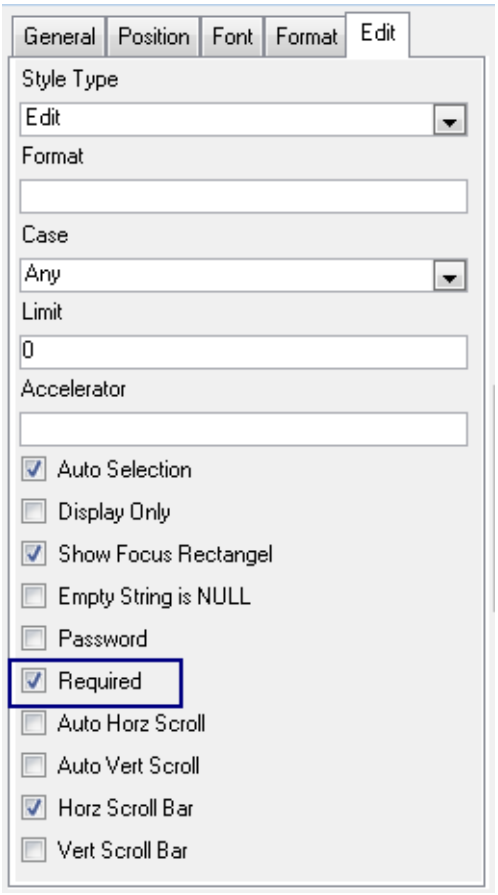
To align controls with other controls present in the designer window:

1. Select the control you want to align others to.
2. Then, hold the **CTRL** key and click to select one or more other fields to align to the position of the first.
3. Once you've selected more than one control, some new Options menu items/toolbar buttons become available. Choose one to align the left/right/top/bottom edges to the first selected control, or make all widths/heights the same as the first selected control.

When you've got several controls selected, the tabs for editing attributes will be disabled. When only one control is selected, the alignment Options menu/toolbar items will be disabled and the attribute tabs enabled as usual.

Mandatory Fields on Templates

You may want to make some fields on your basic or enhanced template mandatory. To do so you select the field and flag the 'Required' checkbox in PowerBuilder DataWindow Painter, or in the case of the AMOS Form Designer, the 'Required' checkbox on the Edit tab:



Connecting a Form and a Template

When you have finished designing your form, import it into the Template register from the library file and connect it to a code, to create a usable template:

1. Go to **File > Open Register > General > Templates.**
2. Either select an existing template record, or create and save a new one.
3. With the template selected, go to **Options > Import Definition**.
4. Click **OK**. Select the .PBL file containing the form definition.
5. Click **Open** to get a list of the form definitions contained in the selected file.
6. Select the definition and click **OK** to import it.

The form will now be available for selection as a template.

Converting a Template

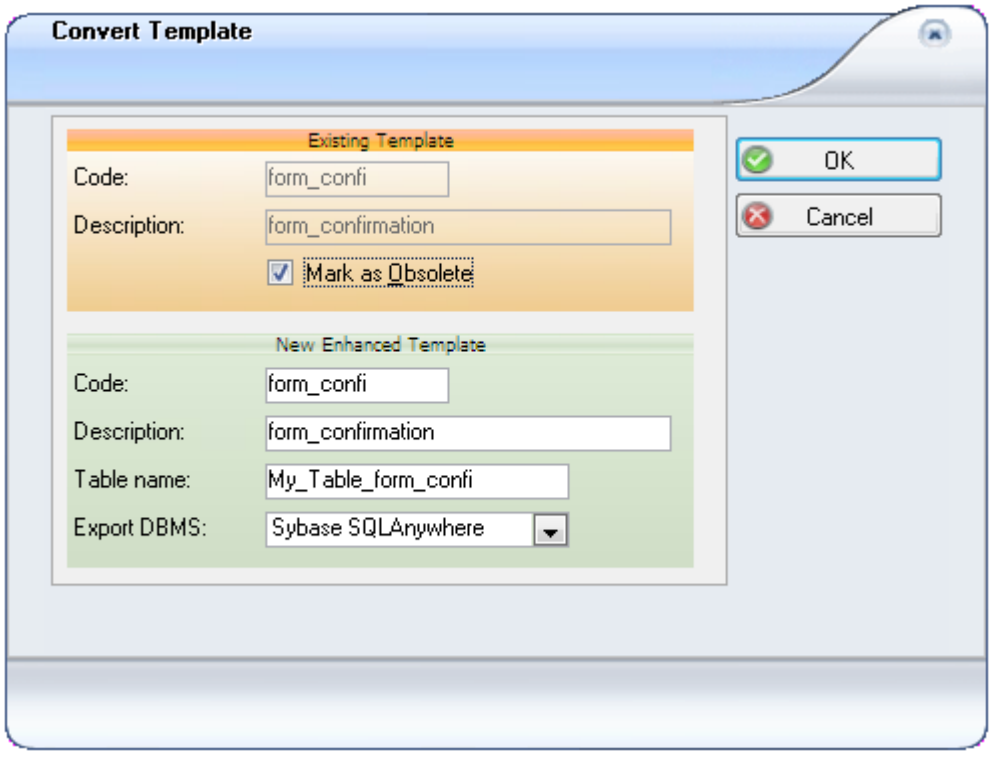
There are two types of templates: Basic and Enhanced. While the two types of templates look the same and show the same data entry fields, enhanced templates create custom tables in the AMOS database upon conversion. Custom tables provide better analysis and trending capabilities than the standard BLOBs which basic templates store all data in.

> **Note:** Not all tables support enhanced templates.

Converting a basic template to an enhanced one allows you to limit access to various areas of the form, meaning that only some users will be able to read or edit certain fields.

To convert a template:

1. Go to **File > Open Register > General > Templates**.
2. Select a basic template in the list.
3. Go to **Options > Convert**.
4. To prevent further use of the existing template check the **Mark as Obsolete** box:



5. Change the **Code** in the bottom part of the dialog to preserve uniqueness. You do not have to change the inherited **Description**.
6. Enhanced templates enable the creation of user defined table names used to store the values entered in the form at a later date. Specify a **Table name** for database storage purposes.

7. Specify the **Export DBMS** to be used. This establishes the **Database Platform** used at the receiving installation during export, ensuring that the correct syntax is provided to create the table in that database.
8. Click **OK** to carry out the conversion and a table will be created in the AMOS database with the Table name you provided.
9. The **Enhanced** column in the Template register will now show 'TRUE'.

Note: AMOS performs a check during conversion to determine if the selected template is attached to a register. If this is the case, a warning is displayed and the obsolete checkbox must be unchecked.

Note: If AMOS Replication is installed you will be prompted to create a replication rule for all new user defined tables associated with enhanced templates.

Defining Access Rights on Enhanced Templates

When you convert a basic template to enhanced, you can divide the resulting form into sections. Then, you can use these sections to limit access to the template:

- Allow certain users to edit data in some areas and read only in other areas.
- Prevent some users from reading certain areas entirely.

Creating Access Sections

To create access sections:

1. Go to **File > Open Register > General > Templates**.
2. Go to **Options > Form Designer**.
3. Go to **Options > Open Form**.
4. Select a form to open.
5. Sections are defined by the keyword 'AMOS_SECTION=#' (where # is the section number) in the **Tag** property of each of the fields when designing the form. This indicates the section to which each field belongs.

   Select a column and then type a section definition for that column, into the **Tag** field such as AMOS_SECTION=1.

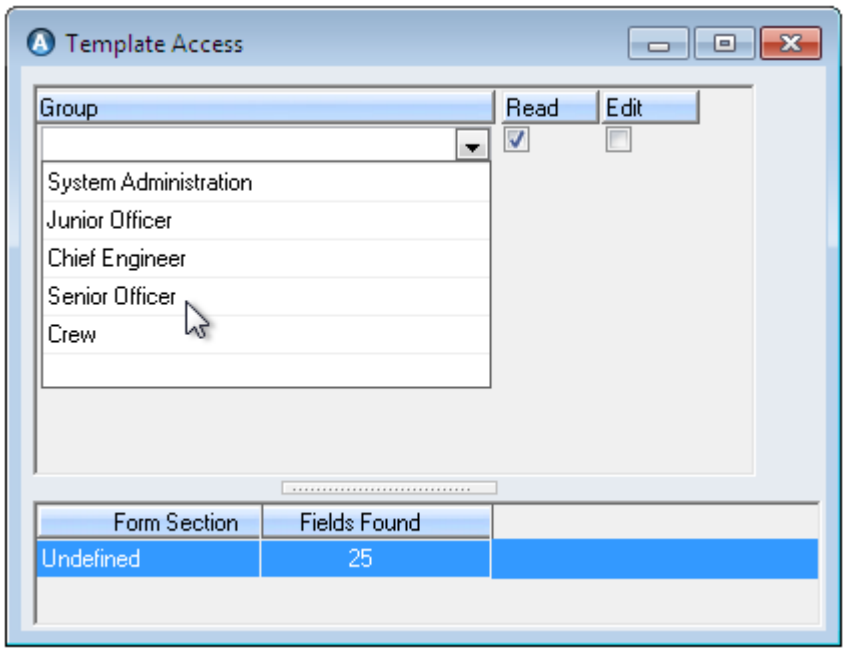
   Continue to group the columns into sections by defining the section number in the **Tag** field for each column.
6. **Save** the form.

Assigning Access Rights

Once you have defined access 'sections' on a form, assign user groups access to each section:

1. Open the Templates register: **File > Open Register > General > Templates**.
2. Select an enhanced template with access sections defined, and go to **Options > Access**[1].
3. Select a 'Form Section' in the bottom of the window.
4. Click in the top of the window and then click **New** on the toolbar.
5. Select a **Group** who can access this section. Flag the **Read** and/or **Edit** boxes to set access rights:

[1] 'Access' is not available on the Options menu unless the selected template is an enhanced one.



6. Add as many groups as necessary, and then do the same for the next section.
7. **Save** your settings and close the window to return to the Templates register.

Remember, if access to a section remains undefined, any group can edit it.

Default Templates

You can assign default templates to appear automatically in a Details tab/Full Description window for an entire window. Once a default template has been defined for a Details tab, it will be displayed in the tab whenever it is opened:

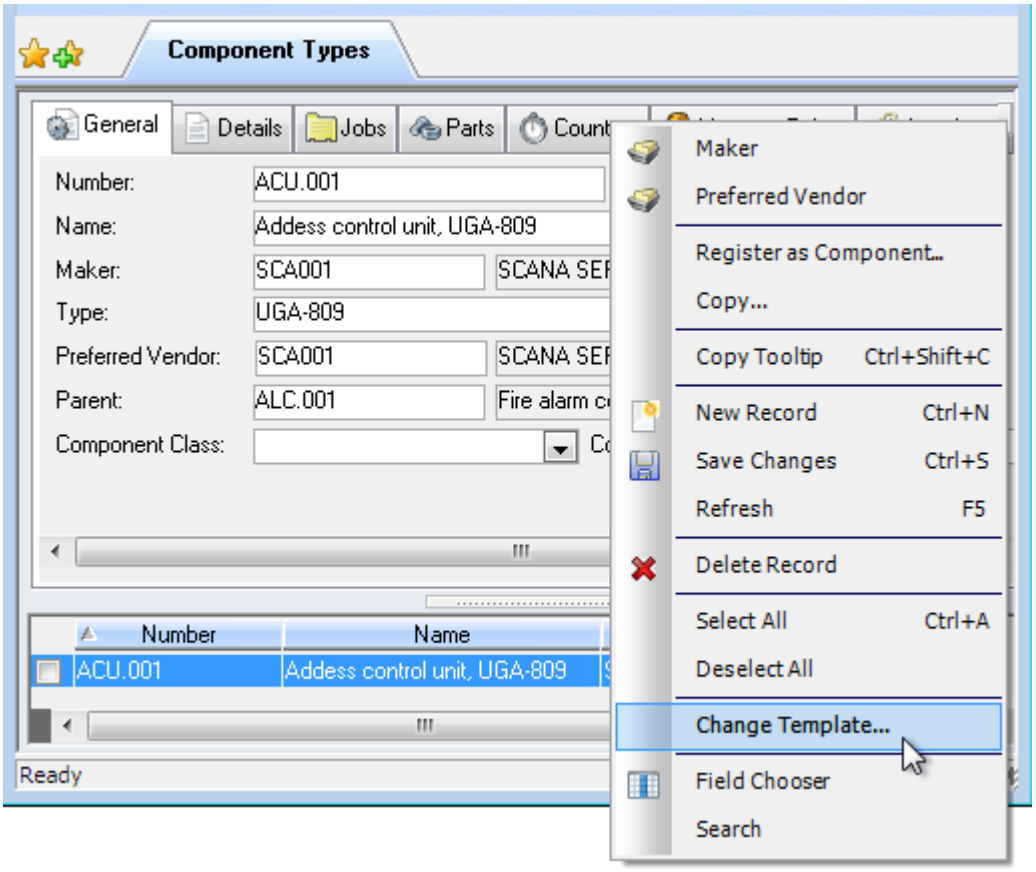
1. Go to **Tools > Configuration > Parameters**.
2. Expand the **Default Templates** folder and select a table. These tables support both basic and enhanced templates as default:
   - Budget Codes
   - Functions
   - History
   - Line Items
   - Noon Reports
   - Order Forms
   - Vouchers
   - Voyages
   - Work Orders
3. Lookup a template and click **OK** to select it.
4. **Save** the changes.

Assigning or Changing a Template

Templates are usually attached to Details tabs/Full Description windows via **Edit > Change Template**. However, a template can be attached automatically on creation of a new table entry, by setting a default parameter.

If no template is assigned to a Details tab/Full Description window, or to change the one which is already present:

1. In the appropriate window, select the record for which to change the template for the Details tab.
2. Right-click and select **Change Template** or go to **Edit > Change Template**.



A warning message appears telling you that if you change the template then any information already in that Details tab will be displayed incorrectly.

3. Click **OK** to open the Select Template dialog and change the template or **Cancel** to close the message box and halt the process.
4. **Save** the changes.

CHAPTER 10

Reports and Extension Features

This chapter includes the following topics:

Getting Started with Reports and Extension Features 298
Running and Printing Standard Reports 298
User-Defined Reports 304
Adding External Modules to AMOS 307
Access Modules 308
Printer Tasks 311

SpecTec

Getting Started with Reports and Extension Features

AMOS Business Suite contains a set of Standard Reports stored in a hierarchy in the Reports browser window:

- run and print standard reports;
- install Ghostscript to save reports as PDFs;
- create and save PowerSoft reports.

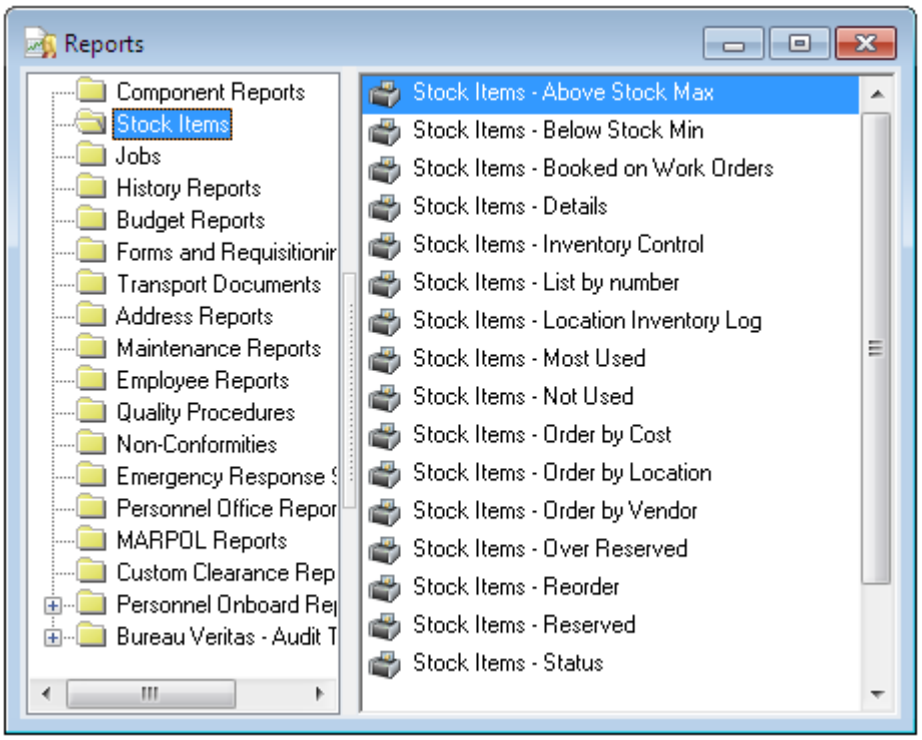
Using the three Extension Features available in AMOS, it's also possible to:

- Create your own user-defined reports and add them to Reports hierarchy.
- Integrate certain external programs and user-defined PowerBuilder modules into AMOS.
- Set up new groupings in the Access Control window, for controlling access to user defined reports and external modules.

See "Printer Tasks" on page 311 for more about printing reports from AMOS.

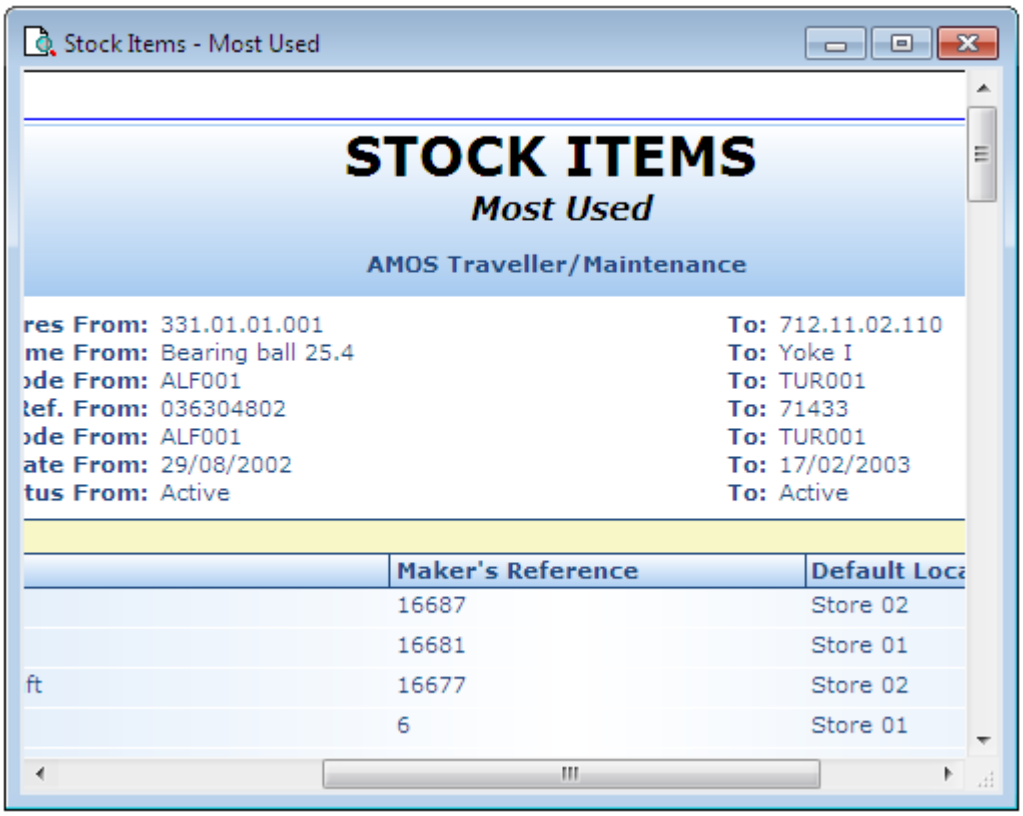
Running and Printing Standard Reports

AMOS Business Suite contains a set of standard reports stored in a hierarchy in the Reports browser window. Go to **Tools > Report** to open the window and click on a folder to view the reports it contains:

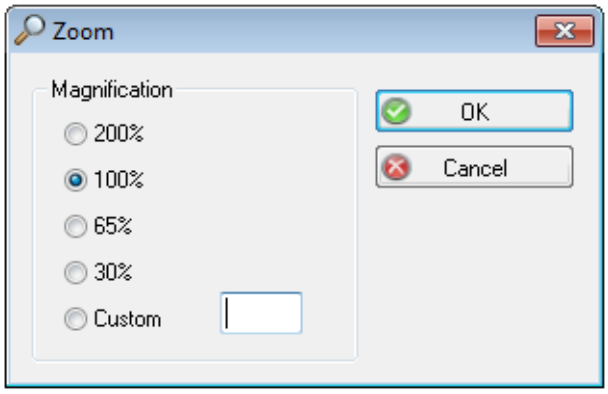


Previewing a Report

1. Double-click on a report.
2. Use the filter to specify the information you want to include in the report.
3. Click **Print Preview** to see the report on-screen:



4. Click the **Zoom** button to select a zoom level:



5. Use the four buttons to the right of the Zoom button to browse the report pages:



6. Click the **Close** button to exit the preview; or click **Print** to print it as shown.

Printing a Report

1. [1]Double-click on a report.
2. Use the filter to specify the information you want to include in the report.
3. Click **Filter** in the filter to go straight to the Print dialog.
4. Click **OK** to print.

See "Printer Tasks" on page 311 for more about printing reports from AMOS.

[1]Reports are printed in colour gradients by default. However, if the system parameter 'Report Use Plain Style' is set to TRUE, they will be printed in grey scale.

Changing the Default Printer

1. Double-click on a report.
2. Click **Printer Setup**in the filter.
3. Choose a new printer and click **OK** in the Printer Setup dialog.

Or:

1. Double-click on a report.
2. Specify the information you want to include in the report.
3. Click **Filter**.
4. Click the **Printer** button in the Print dialog.
5. The Printer Setup dialog opens. Select a printer.
6. Click **OK**.

See "Printer Tasks" on page 311 for more about printing reports from AMOS.

Saving a Report as a PDF

You can save a preview in PDF format. This requires you to install a secondary 'freeware' program - Ghostscript - on the computer.

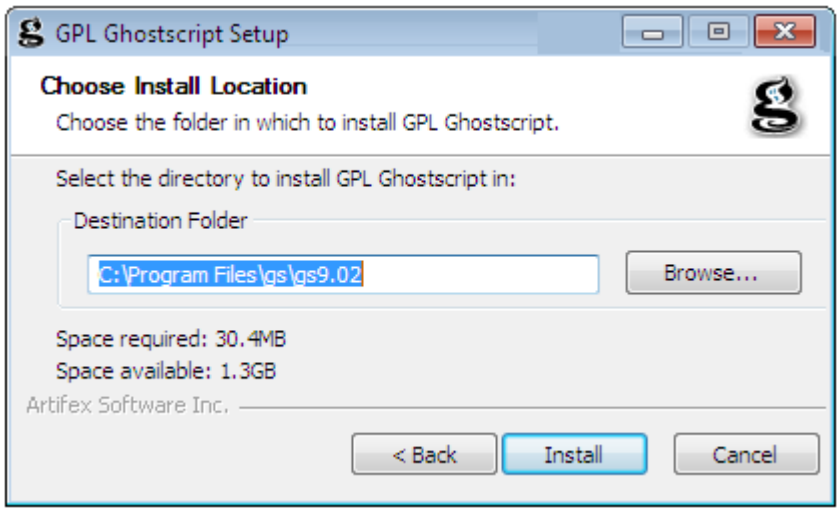
> Ghostscript is available at: http://www.ghostscript.com/

The following instructions apply to users running on Windows 7. If you are running on a different version of Windows, some steps will differ slightly.

Installing Ghostscript

To install and configure Ghostscript:

1. Double-click on the downloaded .exe file. Click **Next** in the Welcome dialog and **I Agree** in the License dialog.
2. The GPL Ghostscript Setup dialog appears. Choose the directory where you want to install Ghostscript:

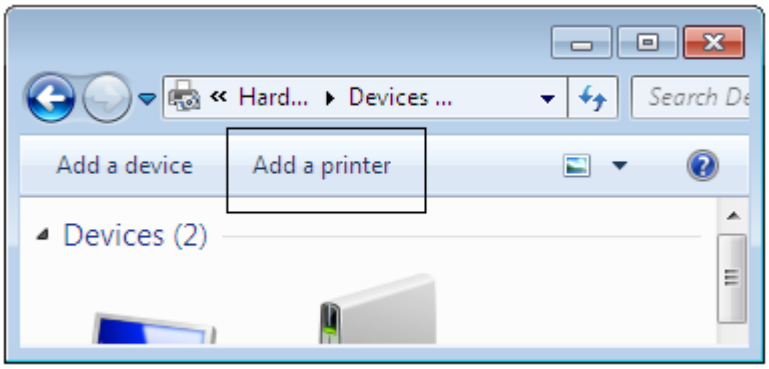


3. Click **Install**. A dialog will inform you when the installation is complete. Click **Finish**.

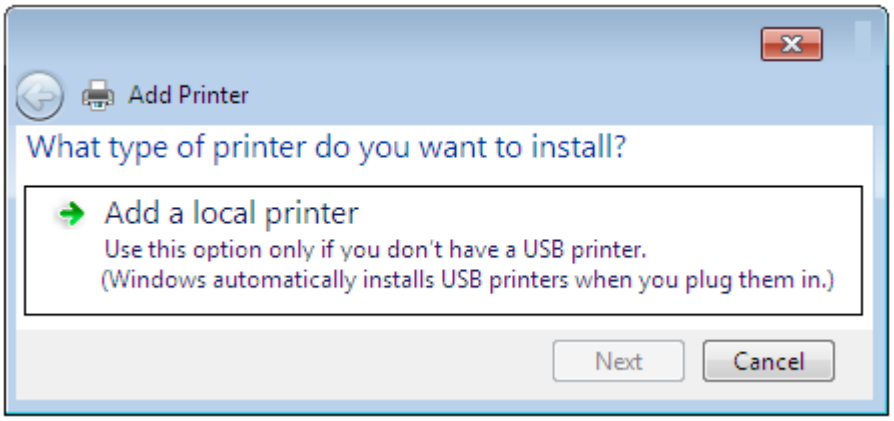
Configure the Printer

Having installed Ghostscript, next configure the PDF Printer:

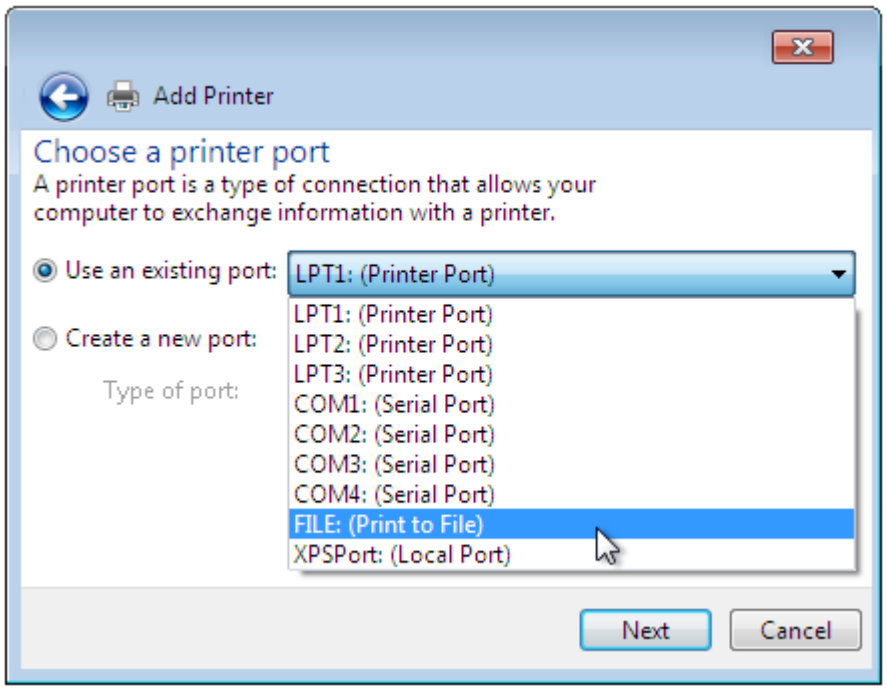
1. Go to **Start > Control Panel** and under Hardware and Sound click on **View Devices and Printers**.
2. In the dialog which opens click **Add a Printer**.



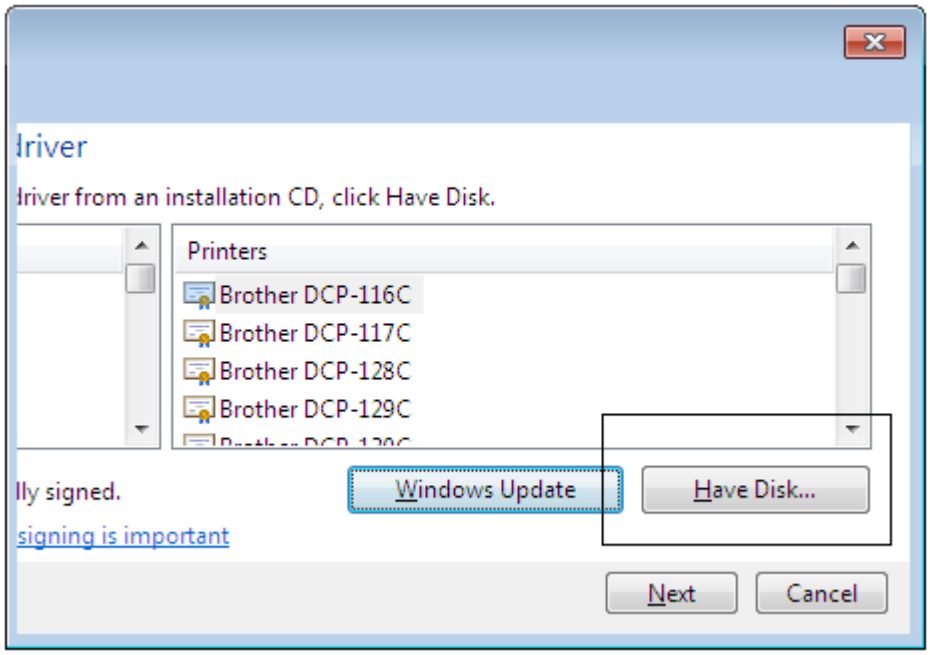
3. The Add Printer Wizard opens. Click on **Add a local printer**.



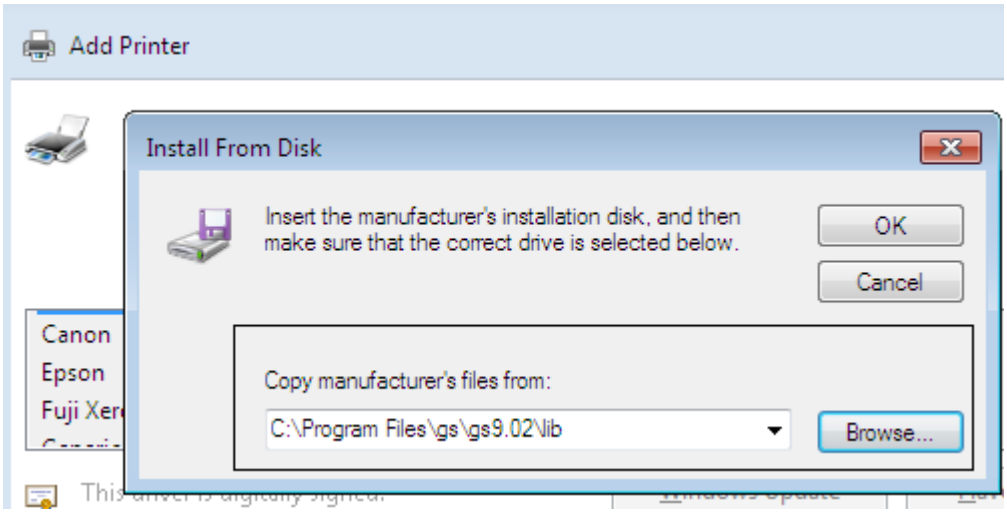
4. Select **Use an existing port** and then choose **FILE** from the drop-down list.



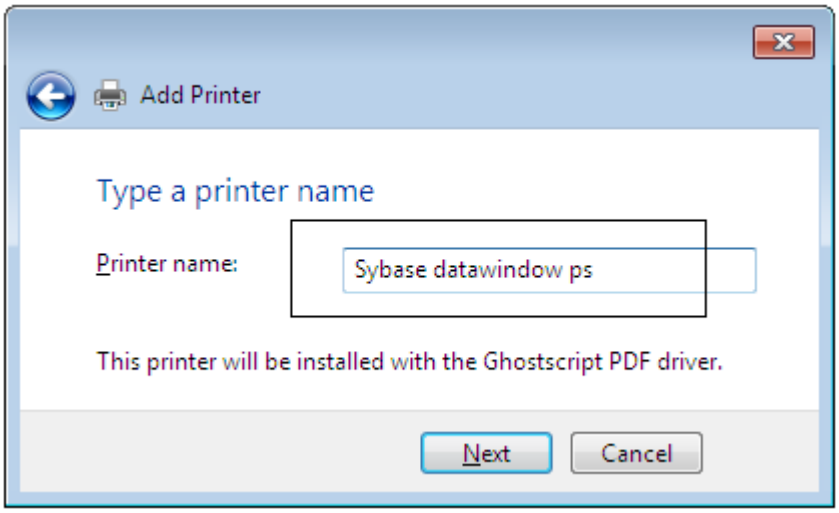
5. Click **Next**.
6. In the following dialog click **Have Disk...**



7. In the Install From Disk dialog, use the **Browse** button to open the Locate File window and find the ghostpdf.inf. This file is located in the path where you installed Ghostscript, in the folder \lib.



8. Click **Open** and then **OK**. You return to the Add Printer dialog; click **Next**.
9. In the next dialog, specify sybase datawindow ps in the **Printer Name** field.



10. Click **Next**. Then in the final dialog, click **Finish**.
11. After installing and configuring Ghostscript, open AMOS Business Suite.
12. Go to **Tools > Configuration > Parameters**.
13. Click on **Options > Purchase > Output** to view the 'Mail Attachment Type' parameter.
14. Set the parameter Globally to PDF Ghostscript. **Save** the window.

PSR Reports

You can create electronic versions of a printed report, called Powersoft Reports (PSR Reports):

1. Go to **Tools > Reports**.
2. Double-click on a report to open the filter.
3. Specify the information you want to include in the report.
4. Click **Print Preview**.
5. Go to **Edit > Save As**.
6. Browse to a location and enter a **File name** for the report.
7. Select 'Powersoft Report' from the **Save as Type** drop-down list.
8. Click **Save**.
9. Close and exit the preview.

To see the filtered and printed report on-screen:

1. Go to **Tools > View PSR Reports...**.
2. Browse to and select the report.
3. Click **Open**.
4. Click **Close** to exit the report.

User-Defined Reports

In addition to the pre-defined reports included with AMOS Business Suite, you can create tailor-made reports for your organisation using PowerBuilder or InfoMaker. When the report has been created and stored in a .pbl library file, to make it available for selection in the Reports browser:

1. Add the new report to the hierarchy. See "Adding a Report to the Hierarchy" below.
2. Create an access module and add the report to it.

   See "Creating an Access Module" on page 308

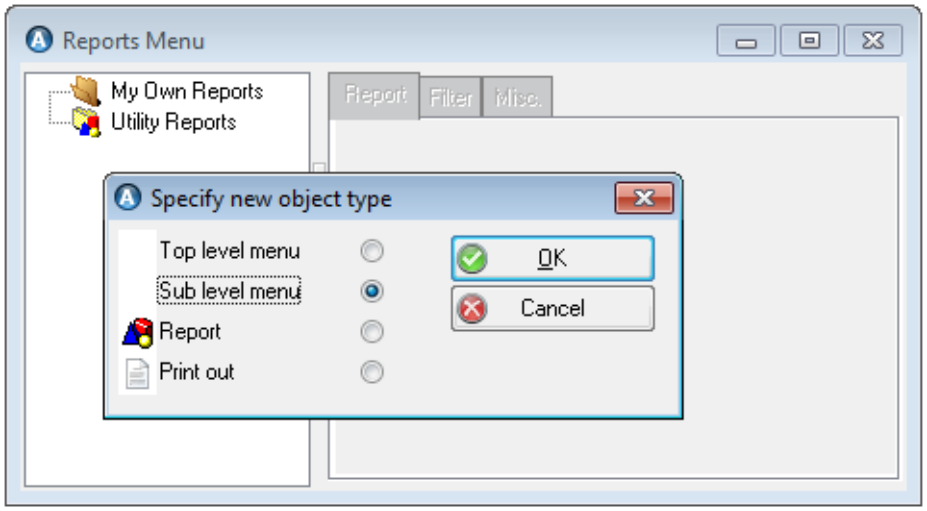
   See "Adding a User Defined Report/External Module to an Access Module" on page 309.
3. Grant user groups access to the report. See "Granting User Access to Reports or External Modules" on page 310.

Adding a Report to the Hierarchy

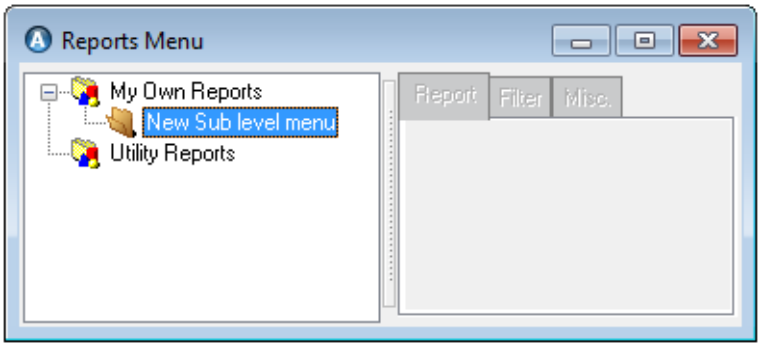
> **EXAMPLE**
>
> You have created a new user-defined report called Tag Stickers. You want to create a folder to contain the report, and add it to the standard AMOS Reports window.

To include a user-defined report in the Reports window hierarchy:

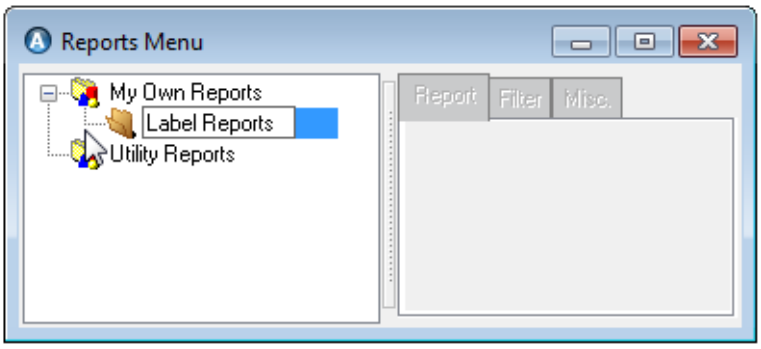
1. Go to **Tools > Configuration > Extension Features > Reports Menu**.
2. Click on a folder in the hierarchy pane and then click **New**:



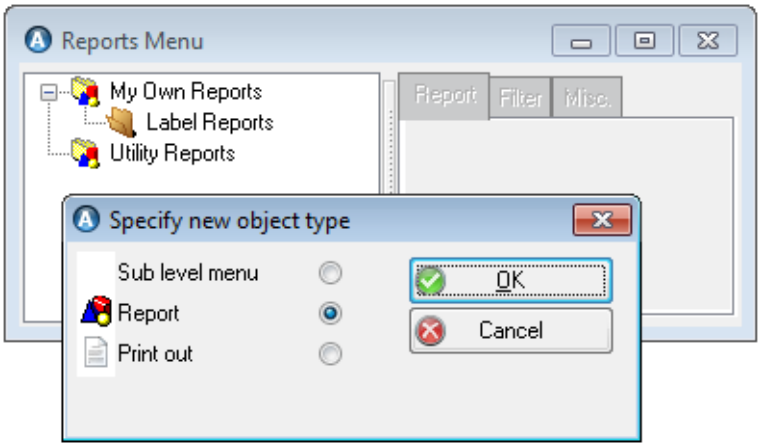
3. Click **Sub level menu** to add a folder and then click **OK**.
4. A new folder appears in the tree structure:



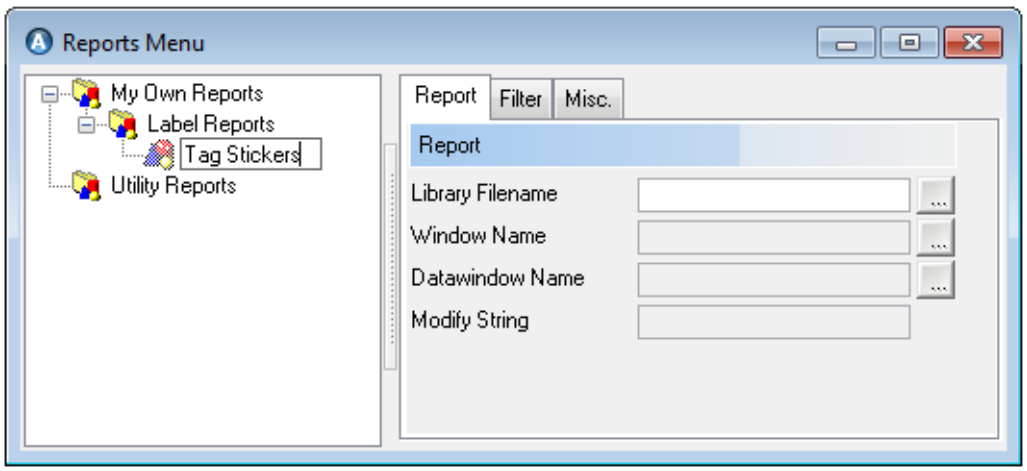
5. Click on the folder name to change it:



5. With the new folder selected, click **New** again and this time choose **Report**:



6. Click **OK**. Name the newly added report:



7. Lookup the **Library Filename**: the folder where the report definition is stored.

   Use a library file with the file extension .Pbl or .Pbd[1]. If you select a library file stored in the Report directory, only the file name is used in the field. If the file is stored elsewhere, the full path name of the library file is used.

8. Lookup the **Datawindow Name**: the name of the data window of the report, from a list of available windows in the selected library. Choose one to get access to the last field on the tab.
9. (Optional) Add a **Window Name** for the report's window.
10. (Optional) Open the Filter tab to add a filter to the report.
11. **Save** your report. Until the report is added into an access module, it will not be available for use.

(Optional) AMOS can make modifications on a report when it is run. See "Modify Strings" below

(Optional) Printer tasks handle the report printing on a selected printer. If any have already been created, you can select one in the Misc. tab.

Modify Strings

You can set up the AMOS Business Suite to make modifications on a report when it is run - for example, that the report should use the number mask defined in the System Parameters window Auto-Numbering folder.

1. Go to **Tools > Configuration > Extension Features > Reports Menu**.
2. Select a report in the hierarchy.
3. Enter a mask in the **Modify String** field. To define multiple text strings, separate them with spaces.

These are the mask names and the corresponding modify strings that you can use. Keep in mind that modify string text is case sensitive:

Component Number Mask	#CompNoFormat#
Form Number Mask	#FormNoFormat#
Function Number Mask	#FuncNoFormat#
Stock Item Number Mask	#PartNoFormat#
Transport Number Mask	#TransDocNoFormat#
Work Order Number Mask	#WONoFormat#

When you specify a mask, enter the name of the field in the data window where the modification should be applied. The same applies to the property of the field that should be changed. For example, a data window called d_test may contain a column field called formno. This shows the form number associated to a Purchase Order, making it logical to display the number with the mask defined in the system. Enter the following value in the **Modify String** field:

» formno.format=#FormNoFormat#

  This tells AMOS that the field property of the formno field is the mask defined as the Form Number Mask.

» Define an edit mask for query data windows for when the user enters numbers in a field. The property is called editmask.mask. If you have a number field and want it to use the Form Number

[1] If you use a library file of the type .Pbd, fill in the fields Window Name and Datawindow Namemanually.

Mask, use the following field value:

formno.editmask.mask=#<Xxxx/No>#

Adding External Modules to AMOS

Integrate certain external programs (like Excel, Word, Notepad) and user-defined PowerBuilder modules into the AMOS Business Suite:

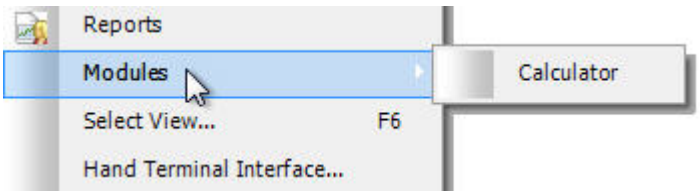
1. Define an external program/module. See "Defining an External Module" below.
2. Create an access module and add the external module to it.

   See "Creating an Access Module" on the next page

   See "Adding a User Defined Report/External Module to an Access Module" on page 309.
3. Grant user groups access to the external module. See "Granting User Access to Reports or External Modules" on page 310.

Defining an External Module

When you add the first external module to AMOS, a new entry is created on the Tools menu: 'Modules'. The Modules sub-menu will list available programs[1]:



To integrate an external module, for example, the calculator:

1. Go to **Tools > Configuration > Extension Features > Modules Menu**.
2. Click **New**.
3. Type 'Calculator' in the **Menu Text** field. This will appear in the Modules sub-menu.
4. Select a **Type**:
   - **Executable** for external programs;
   - **Executable blocking application** for external programs that will halt the operation of AMOS until they are run and closed;
   - **PB Function** for PowerBuilder executable programs.
5. Lookup the location of the .exe file to launch the program, in the **Start Command** field.
6. Add text to appear in the lower left hand corner of the screen in the **Microhelp** field.
7. For the Toolbar:
   Button Bitmap. Browse to your own graphic button to place on the toolbar, or choose a pre-defined one from the drop-down list.

   Item Text. Text to appear on the button[2].

   Toolbar Tip. Text to appear when you hover over the button.[3]

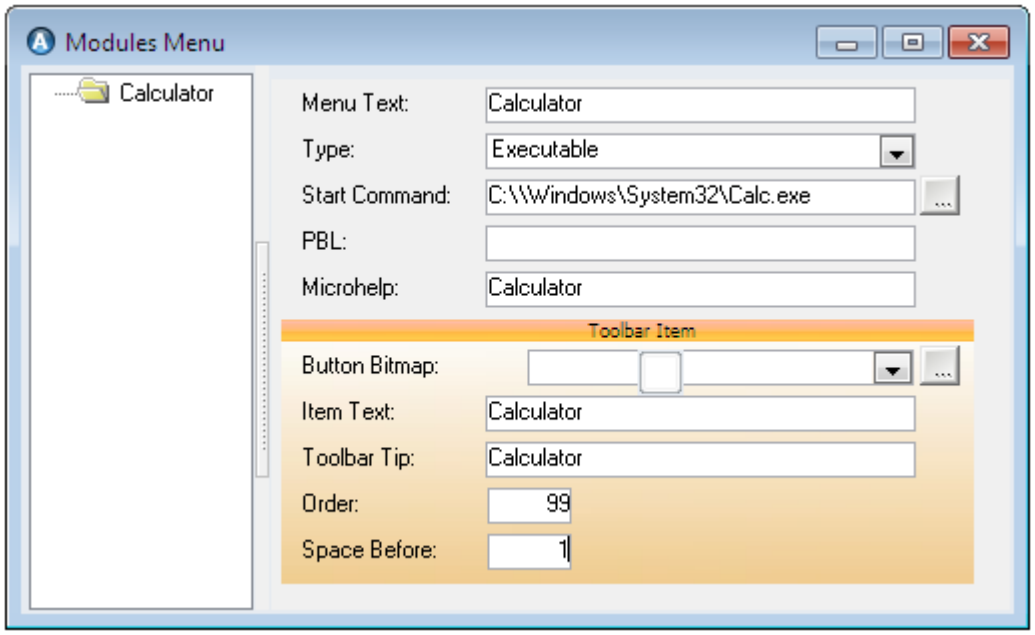
   Order. Where the button will appear on the toolbar; generally set to higher values, i.e. 99 or 100 or greater.

[1] Modules menu entries are accessible according to user access rights.

[2] Displays if the Toolbar text option is switched on in the Tools > Options window General tab.

[3] Displays if the Toolbar tips option is switched on in the Tools > Options window General tab.

Space Before. Amount of space between this button and the one to its left on the toolbar; generally set to 1.



8. **Save** your module. Add the calculator into an access module to make it available for use.

Whenever you make changes to the Modules menu, re-start AMOS Business Suite to show the changes.

Access Modules

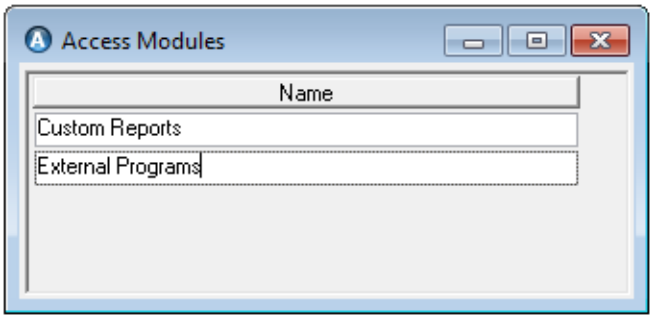
Set up new groupings called Access Modules, to list in the Access Control window. User defined reports and external modules must be added to an access module so that user groups can be assigned the rights to use them.

1. Create an access module. See "Creating an Access Module" below.
2. Add your new user-defined report or external program to it. See "Adding a User Defined Report/External Module to an Access Module" on the facing page.
3. Grant user groups access to the contents of the access module. See "Granting User Access to Reports or External Modules" on page 310.

Creating an Access Module

To create a new access module:

1. Go to **Tools > Configuration > Extension Features > Access Modules**.
2. Click **New**.
3. Enter a **Name**,like Custom Reports or External Programs:



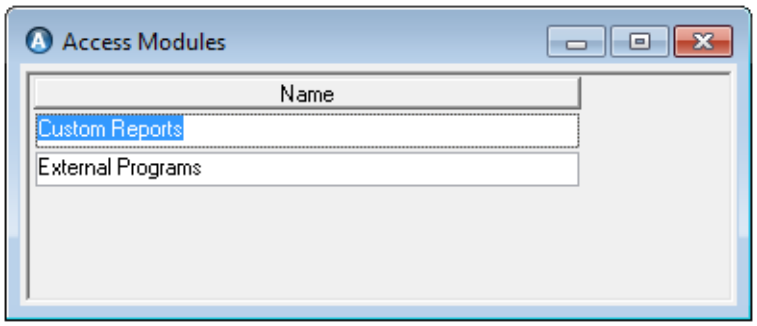
This is what will appear in the Reports/Modules tab on the Access Control window.

4. **Save** and exit the window.

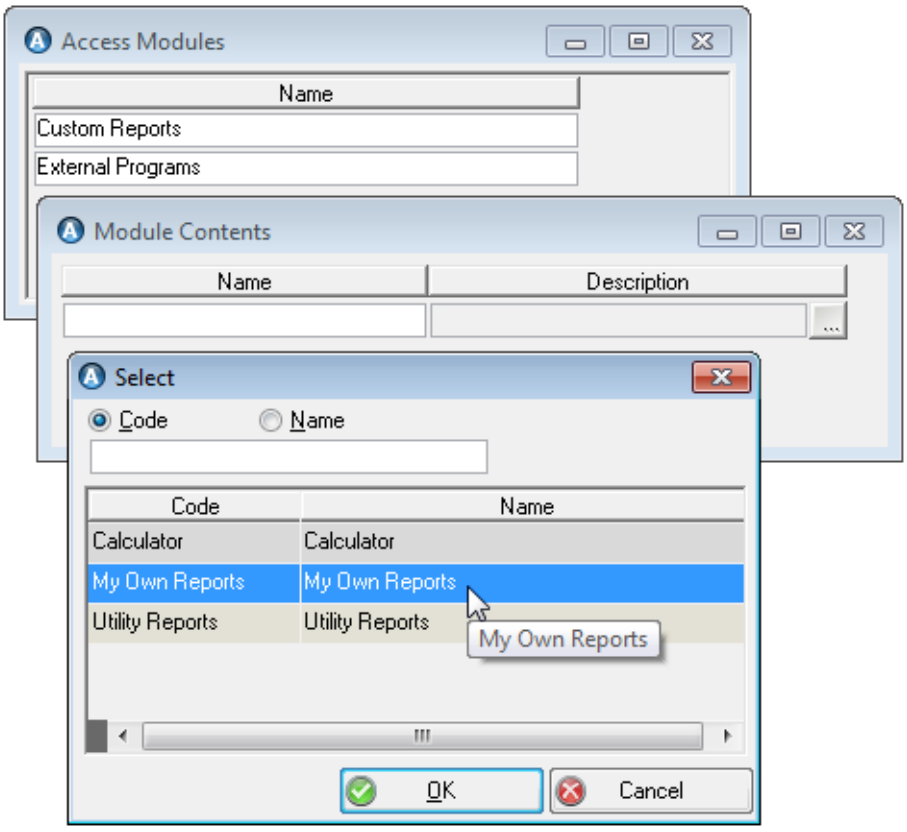
Adding a User Defined Report/External Module to an Access Module

When you add a new user-defined report or define an external module, it will not be available for use until it is added into an access module:

1. Go to **Tools > Configuration > Extension Features > Access Modules**.
2. Select an access module:



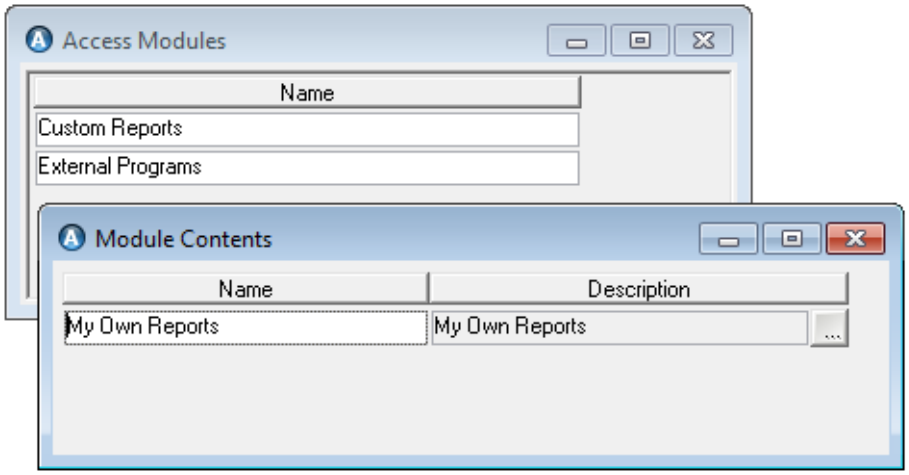
3. Go to **Options > Module Contents**.
4. Lookup the new report/external module:



In the case of a report, all entries in the reports hierarchy must be added to make this report accessible - that is, the top level menu, all sub-level menus and the Report itself.

You can add more than one report/external module into the same access module.

5. Click **OK** to add the selection to the Module Contents list:

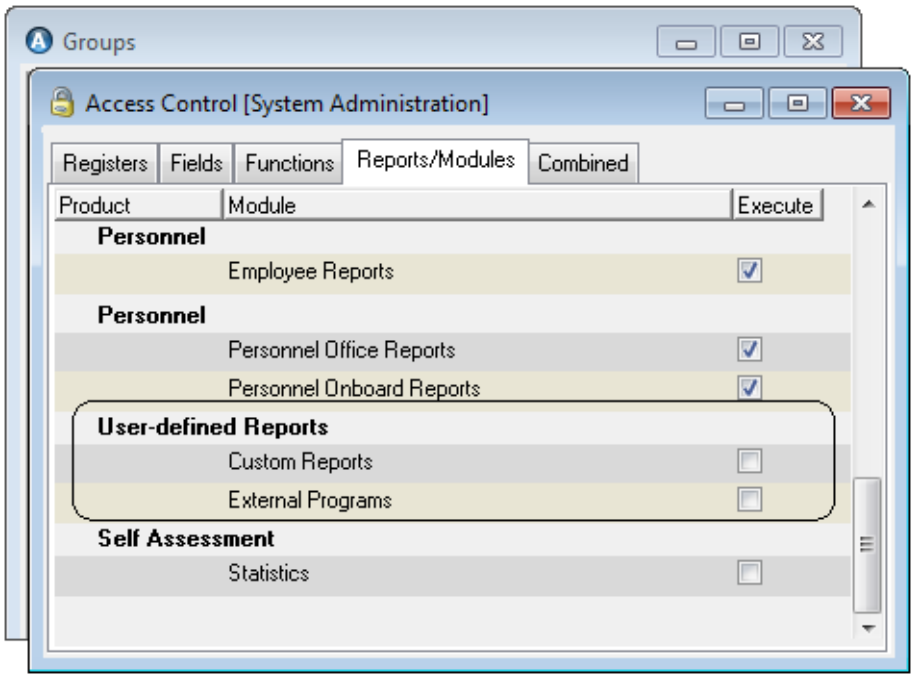


6. **Save** and close the Module Contents window to return to the Access Modules window.
7. **Save** and close the Access Modules window. Now you can grant the relevant user groups access to the reports/external modules contained in the access module.

Granting User Access to Reports or External Modules

Once you have created a new report/external module and added it to an access module grouping, grant user group access to it as needed:

1. Go to **Tools > Configuration > Access Control > Groups**.
2. Select a Group to grant access to.
3. Go to **Options > Access Control**.
4. Open the Reports/Modules tab. Scroll down until you see the User-Defined Reports section with your access module(s) underneath it:



5. Check **Execute** beside the access module entry to allow the user group access to the reports/external modules contained in the access module grouping[1].
6. **Save** the window.

[1] As listed in the Module Contents window; see "Adding a User Defined Report/External Module to an Access Module" on the previous page.

7. Restart AMOS for these changes to take effect:
    - User-defined external programs/modules will be available at **Tools > Modules**.
    - User-defined reports will be listed in the **Tools > Reports** window.

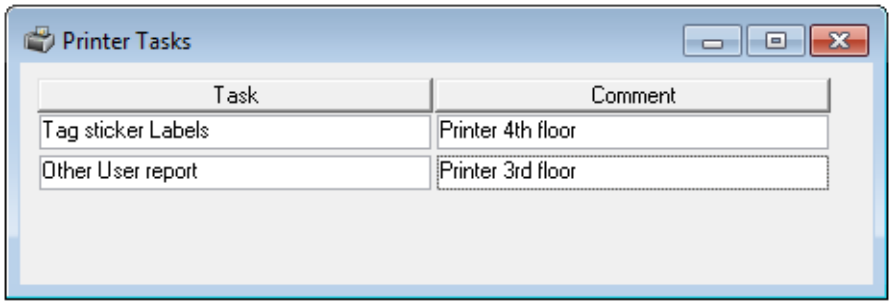
Printer Tasks

Printer tasks handle reports printing on a designated printer.

Defining Printer Tasks

To create the tasks that will then be available in the Reports Menu window:

1. Go to **Tools > Configuration > Printer Tasks**.
2. Click **New**.
3. Give the **Task** a name, and add a **Comment** to describe it:



4. **Save** the task.
5. Go to **Options > Printer Task Configuration**.
6. Select a printer in the Task Configuration window **Identification** field.
7. If no printer names are available, go to **Options > System Printers** for AMOS to add the printer definitions available on your PC into its own database. After AMOS imports this information, you can select a printer from the **Identification** drop-down list.
8. (Optional) Describe the printer in the **Comments** field.
9. Enter how many **Copies** this task should print.
10. Lookup the **Paper Source** for the selected printer.
11. **Save** and close the window to return to the Printer Tasks window.

Assigning Printer Tasks to Reports

Printer tasks handle the report printing on a selected printer. To assign a task to a report:

1. Go to **Tools > Configuration > Extension Features > Reports Menu**.
2. Select a report in the hierarchy and open the Misc. tab.
3. Select a **Printer Task** from the drop-down list.
4. **Save** and exit the window.

Printing Barcodes on Labels

You can print barcodes on labels: for example, to display a stock item's code as a barcode rather than as a numeric value, on a printed label.

This requires:

1. Downloading and installing a barcode font.
2. Altering the amosw.ini file to indicate that the font is in use.

3. Updating any existing label printing report, or creating a new one.

To download and install a free code128 font set see:

```
http://freebarcodefonts.dobsonsw.com/code128font-download.html
```

Select the Code 128 Font file only (Windows installer) option and then follow the steps in the setup wizard to install it.

Then, add the following section to the amosw.ini file:

```
[Customisation]
Code128-
=B,128,33,34,35,36,37,38,39,40,41,42,43,44,45,46,47,48,49,50,51,52,53,54,5-
5,56,57,58,59,60,61,62,63,64,65,66,67,68,69,70,71,72,73,74,75,76,77,78,79,8-
0,81,82,83,84,85,86,87,88,89,90,91,92,93,94,95,96,97,98,99,100,101,102,103,-
104,105,106,107,108,109,110,111,112,113,114,115,116,117,118,119,120,121,122-
,123,124,125,126,145,146,147,148,149,150,151,152,153,154,155,156
```

Save the ini file.

Next, open your label printing report. Update it so that the stock code or value you want to print as a barcode rather than as a numeric code, is set to use the newly installed code128 font.

APPENDIX A

AMOS Internal Work Flow Actions

This appendix lists the AMOS Internal Work Flow Actions available for configuring the work flow.

This chapter includes the following topics:

Introduction 314
List of Actions 314

SpecTec

Introduction

When a Work Flow transformation is performed, a new record is added to the table WorkFlowLog, filling the following columns:

Transformed	From WorkFlowTransform
TransComment	The user's comment added in the Work Flow dialog
ObjectID	Key column value for a work flow object, i.e. OrderId, WorkOrderId, etc.
DeptID	The object's department ID

For each standard action that a transformation performs, a new record is added to the table WorkFlowStdLog, filling the following columns:

TransStdActionID	From WorkFlowStdAction
DeptID	The object's department ID

When a user selects another user from the 'Assign To' list in a Work Flow dialog window, an entry in the table WorkFlowMailbox is updated or created with the column 'ToUser' set to the selected user ID.

List of Actions

Refer to the tables below for a complete list of AMOS Internal Work Flow Actions and an explanation of what each action does, organised by module.

Module/ID/Table - Maintenance/2/WorkOrder	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:' on the Work Flow dialog window.
Cancel	Set 'wostatus' to 4 = Cancelled
Change Work Permits Status	Update or create an entry in table WoWorkPermit with given 'Issue To' ID.
Complete	Set 'wostatus' to 7 = Completed
Control	If 'wostatus' = 4 (cancelled) or 7 (completed), set 'wostatus' to 8 = Controlled. Set 'filed' to 1 if: 'woorigin' = 1 (Requisition/General); or 2 (Period); or 4 (CBM); or 6 (Round); or 7 (Corrective Action); and, corresponding AutoFileControlled parameter is set to TRUE.
Create Order Form	Creates entry in tables OrderForm and OrderLine, with relevant workorderid.
File	Set 'filed' =1

Module/ID/Table - Maintenance/2/WorkOrder	
System Action	**Action Performed by System Action**
Issue	Set 'wostatus' to 6 = Issued. Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Issue Print	None.
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = orderid and moduleid = 2 (Maintenance). Set column 'Locked' = 1.
Plan	Set 'wostatus' to 2 = Planned Set 'plannedby' = <current AMOS user>
Postpone	Set 'wostatus' to 3 = Postponed
Report	Open the Report Work window and create an entry in table MaintenanceLog.
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Requested	Set 'wostatus' to 1 = Requested
Set to Pending	Set 'wostatus' to 5 = Pending
Unfile	Set 'filed' = 0
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = workorderid and moduleid = 2 (Maintenance). Set column 'Locked' = 0.

Module/ID/Table - Purchase/1/OrderForm	
System Action	**Action Performed by System Action**
Activate	Set 'formstatus' to 1=Active
Approve Purchase Order	Set 'approvedby' = <current AMOS user> Set 'approveddate' = <current date>
Approve Requisition	Set 'reqnapprovedby' = <current AMOS user> Set 'reqnapproveddate' = <current date>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'formstatus' to 5 = Cancelled
Convert to Purchase Order	Set 'formtype' to 1 = Purchase Order
Convert to Query	Set 'formtype' to 3 = Query
Convert to Requisition	Set 'formtype' to 2 = Requisition
File	Set 'formstatus' to 3 = Filed

Module/ID/Table - Purchase/1/OrderForm	
System Action	**Action Performed by System Action**
File Full Received	None
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = orderid and moduleid = 1 (Purchase). Set column 'Locked' = 1.
Park	Set 'formstatus' to 2 = Parked
Print	Print
Receive	Set 'receiveddate' = <date set by user>
Revoke Approval From Purchase Order	Set 'approvedby' = null Set 'approveddate' = null
Revoke Approval From Requisition	Set 'reqnapprovedby' = null Set 'reqnapproveddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = orderid and moduleid = 1 (Purchase) . Set column 'Locked' = 0

Module/ID/Table - QuotationCompareScen/18/QuotationCompareScenario	
System Action	**Action Performed by System Action**
Approve	Set 'approvedby' = <current AMOS user> Set 'approveddate' = <current date>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = quotationcomparescenarioid and moduleid = 18 (Quotation Compare Scenario). Set column 'Locked' = 1
Propose	Set 'proposedby' = <current AMOS user< Set 'proposeddate' = <current date>
Revert	Set 'prosposedby' = null Set 'proposeddate' = null
Revoke	Set 'approvedby' = null Set 'approveddate' = null
Select	Set 'selectedby' = <current AMOS user> Set 'selecteddate' = <current date>
Send Mail	Send e-mail to user

Module/ID/Table - QuotationCompareScen/18/QuotationCompareScenario	
System Action	**Action Performed by System Action**
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = quotationcomparescenarioid and moduleid = 18 (Quotation Compare Scenario). Set column 'Locked' = 0
Unselect	Set 'selectedby' = null Set 'selecteddate' = null

Module/ID/Table - Custom Clearance/12/CustomClearanceForm	
System Action	**Action Performed by System Action**
Arrive Custom	Arrived at Customs. Set 'customarriveddate' = today
Arrive Freezone	Arrived at free zone. Set 'freezonearriveddate' = today
Custom Clearance	Cleared at Customs. Open the Obtain Custom Clearance Declaration window and store the 'declarationno', 'declarationdate', 'airwaybill', 'billoflading', 'invoiceno' and 'currencycode' as user specifies, in table 'CustomClearanceForm'.
File	File the record. Set column 'Filed' = 1
Finalise	Record is finalised. Set 'status' to 3 = Finalised Set 'finaliseddate' = today
Issued	Record is issued (accepted) by EGPC . Set 'status' to 2 = Issued Set 'processeddate' = today
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = customclearanceformid and moduleid = 12 (Custom Clearance). Set column 'Locked' = 1
Rejected	Record is rejected by EGPC. Set 'processeddate' = today
Send SMS	Send SMS to user
Submit	Record is submitted to EGPC. Set 'submitteddate' = today
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = customclearanceformid and moduleid = 12 (Custom Clearance. Set column 'Locked' = 0

Module/ID/Table - Voucher/13/Voucher	
System Action	**Action Performed by System Action**
Activate	Set 'cancelledby' = null Set 'cancelleddate' = null
Approve	Set 'paymentapprovedby' = <current AMOS user> Set 'paymentapproveddate' = <current date>
Assign	None

Module/ID/Table - Voucher/13/Voucher	
System Action	**Action Performed by System Action**
Cancel	Set 'cancelledby' = <current AMOS user> Set 'cancelleddate' = <current date>
File	Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = voucherid and moduleid = 13 (Voucher). Set column 'Locked' = 1
Revoke	Set 'paymentapprovedby' = null Set 'paymentapproveddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unfile	Set 'filedby' = null Set 'fileddate' = null
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = voucherid and moduleid = 13 (Voucher). Set column 'Locked' = 0

Module/ID/Table - SA Configuration/10/TmsaConfiguration	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
File	Set 'configstatus' to 3 = Filed
Issue	Set 'configstatus' to 2 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Lock	Lock the record for further editing. Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/ID/Table - Self Assessment/11/TmsaAssessment	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
File	Set 'assessmentstatus' to 3 = Filed

Module/ID/Table - Self Assessment/11/TmsaAssessment	
System Action	**Action Performed by System Action**
Issue	Set 'assessmentstatus' to 2 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Lock	Lock the record for further editing. Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/ID/Table - RiskMgmtAssessment/17/RmAssessment	
System Action	**Action Performed by System Action**
Assess	Set 'status' to 2 = Assessed Set 'assessedby' = <current AMOS user> Set 'assesseddate' = <today>
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'status' to 4 = Cancelled Set 'cancelledby' = <current AMOS user> Set 'cancelleddate' = <current date>
File	Set 'status' to 3 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmassessmentid and moduleid = 16 (Risk Management Assessment). Set column 'Locked' = 1
Review	Set 'status' to 1 = Reveiw
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectlocked where objectid = rmassessmentid and moduleid = 17 (Risk Management Assessment). Set column 'Locked' = 0

Module/ID/Table - RiskMgmtMatrix/14/RmMatrix	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.

Module/ID/Table - RiskMgmtMatrix/14/RmMatrix	
System Action	**Action Performed by System Action**
File	Set 'status' to 2 = Filed Set 'filedby' = <current amos user> Set 'fileddate' = <today>
Issue	Set 'status' to 2 = Active Set 'issuedby' = <current amos user> Set 'issueddate' = <today>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmmatrixid and moduleid = 14 (Risk Management Matrix). Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = rmmatrixid and moduleid = 14 (Risk Management Matrix). Set column 'Locked' = 0

Module/ID/Table - RiskMgmtScenario/16/RmScenario	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'status' to 3 = Cancelled Set 'cancelledby' = <current AMOS user> Set 'cancelleddate' = <current date>
File	Set 'status' to 2 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Issue	Set 'status' to 1 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date> If the scenario has status = 1 (Issued) and oldrmscenarioid has a value then: Set 'status' to 2 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmscenarioid and moduleid = 16 (Risk Management Scenario) . Set column 'Locked' = 1
Send Mail	Send e-mail to user

Module/ID/Table - RiskMgmtScenario/16/RmScenario	
System Action	**Action Performed by System Action**
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = rmscenarioid and moduleid = 16 (Risk Management Scenario). Set column 'Locked' = 0

Module/ID/Table - RiskMgmtScenarioType/15/RmScenarioType	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'status' to 3 = Cancelled Set 'cancelledby' = <current amos user> Set 'cancelleddate' = <today>
File	Set 'status' to 2 = Filed Set 'filedby' = <current amos user> Set 'fileddate' = <today>
Issue	Set 'status' to 1 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date> If the scenario type has status = 1 (Issued) and oldrmscenariotypeid has a value then: Set 'status' to 2 = Filed Set 'filedby' = <current AMOS user> Set 'fileddate' = <current date>
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = rmscenariotypeid and moduleid = 15 (Risk Management Scenario Type). Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = rmmatrixid and moduleid = 15 (Risk Management Scenario Type). Set column 'Locked' = 0

Module/Table - Procedures/ProcedureVersion	
System Action	**Action Performed by System Action**
Approve	Set 'approvedby' = <current AMOS user> Set 'approveddate' = <current date>

Module/Table - Procedures/ProcedureVersion	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Set column 'Locked' = 1. Set 'proceduredocver.status' = 1.
Publishing	Set 'status' to 2 = Published
Revoke Approval	Set 'approvedby' = null Set 'approveddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0. Set 'proceduredocver.status' = 1.

Module/Table - Circulars/ProcedureVersion	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Set column 'Locked' = 1
Publish	Set 'status' to 2 = Published
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Obsolete	Set 'status' to 3 = Obsolete
Set to Draft	Set 'status' to 2 = Draft
Unlock	Enable editing on record by removing lock. Set 'procedureversion.locked' = 0.

Module/Table - Non Conformities/NonConformity	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Lock	Lock the record for further editing. Set column 'Locked' = 1
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/Table - Incidents/Accident	
System Action	**Action Peformed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Close	Set 'closedby' = <current AMOS user> Set 'closeddate' = <current date>
Lock	Lock the record for further editing. Set column 'Locked' = 1
Reopen	Set 'closedby' = null Set 'closeddate' = null
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Unlock	Enable editing on record by removing lock. Set column 'Locked' = 0

Module/Table - Manuals/Manual	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Publish	Set 'status' to 2 = Published
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set to Draft	Set 'status' to 1 = Draft
Set to Obsolete	Set 'status' to 3 = Obsolete

Module/Table - Claims/Claim	
System Action	**Action Performed by System Action**
Activate	Set 'claimstatus' to 1 = Active
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Close	Set 'claimstatus' to 4 = Closed
Park	Set 'claimstatus' to 3 = Parked
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Pending	Set 'claimstatus' to 2 = Pending

Module/Table - Quality Work Orders/WorkOrder	
System Action	**Action Performed by System Action**
Assign	Assign the object to a user's mailbox: update or create an entry in table WorkFlowMailbox with column 'touser' set to the ID selected in 'Assign To:'on the Work Flow dialog window.
Cancel	Set 'wostatus' to 4 = Cancelled
Change Work Permits Status	Update or create an entry in table WoWorkPermit with given 'Issue To' ID.
Complete	Set 'wostatus' to 7 = Completed
Control	If 'wostatus' = 4 (cancelled) or 7 (completed), set 'wostatus' to 8 = Controlled. Set 'filed' to 1 if: 'woorigin' = 1 (Requisition/General); or 2 (Period); or 4 (CBM); or 6 (Round); or 7 (Corrective Action); and, corresponding AutoFileControlled parameter is set to TRUE.
File	Set 'filed' = 1
Issue	Set 'wostatus' to 6 = Issued Set 'issuedby' = <current AMOS user> Set 'issueddate' = <current date>
Issue Print	None
Lock	Lock the record for further editing. Add entry to table WorkFlowObjectLocked where objectid = orderid and moduleid = 2 (Maintenance). Set column 'Locked' = 1
Plan	Set 'wostatus' to 2 = Planned Set 'plannedby' = <current AMOS user>
Postpone	Set 'wostatus' to 3 = Postponed
Report	Open Report Work window and create entry in table maintenancelog.
Send Mail	Send e-mail to user
Send SMS	Send SMS to user
Set Requested	Set 'wostatus' to 1 = Requested
Set to Pending	Set 'wostatus' to 5 = Pending
Unfile	Set 'filed' = 0
Unlock	Enable editing on record by removing lock. Delete entry from table WorkFlowObjectLocked where objectid = workorderid and moduleid = 2 (Maintenance) . Set column 'Locked' = 0

APPENDIX B

Address Type Lookup Limitations

This appendix lists lookup fields in AMOS and the valid address types each one will display.

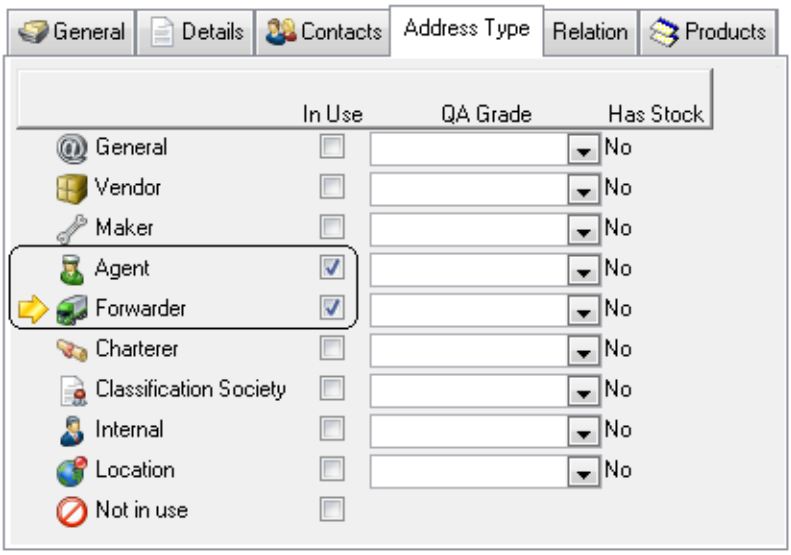
This chapter includes the following topics:

Introduction 326
List of Lookups 326

SpecTec

Introduction

Your Address register probably contains a lot of different kinds of addresses: vendors, makers, agents, classification societies, etc. In the Address Type tab you can select one or more 'Types' for each registered address, by flagging the **In Use** box next to any which apply:



Setting one or more types on an address limits its availability for selection in the system: for example an address marked as type 'Maker' would not be available for selection from a 'Vendor' address lookup list. Keep in mind:

- Flagging one or more types for an address restricts its availability to lookups in the relevant areas.
- Flagging type 'General' makes an address available system-wide. Flagging several types including General means the address will be available system-wide.
- If no types are flagged, the address will be available system-wide.
- Flagging 'Not in Use' removes the address from selection and use throughout the system. This cannot be flagged without unflagging any other selected types first.

List of Lookups

The following table shows a list of lookup fields within AMOS and the valid address types each one will display:

Menu	[Tab]/Field	Address Type
File > Open Register > Employees	Address	Internal only
File > Open Register > Vessel Details	[Log] Classification Society	Classification only
File > Open Register > Vessel Details	[Log] Owner	Internal only
Maintenance > Component Types	[General] Maker	Maker only
Maintenance > Component Types	[General] Preferred Vendor	Vendor only
Maintenance > Component Types Hierarchy	[General] Maker	Maker only
Maintenance > Component Types Hierarchy	[General] Preferred Vendor	Vendor only

Menu	[Tab]/Field	Address Type
Maintenance > Components	[General] Maker	Maker only - only applies when Component Types are not in use
Maintenance > Components	[General] Vendor	Vendor only
Maintenance > Components Hierarchy	[General] Maker	Maker only - only applies when Component Types are not in use
Maintenance > Components Hierarchy	[General] Vendor	Vendor only
Maintenance > Function Hierarchy	[General] Maker	Maker only - only applies when Component Types are not in use
Maintenance > Function Hierarchy	[General] Vendor	Vendor only
Maintenance > Work Orders	[General] UDF Address	any; no restriction, skips Not in Use addresses
Maintenance > Projects	[General] UDF Address	any; no restriction, skips Not in Use addresses
Stock > Stock Types	[General] Maker	Maker only
Stock > Stock Types	[General] Preferred Vendor	Vendor only
Stock > Stock Types	[Vendors] Vendor	Vendor only
Stock > Stock Type Hierarchy	[General] Maker	Maker only
Stock > Stock Type Hierarchy	[General] Preferred Vendor	Vendor only
Stock > Stock Items	[General] Maker	Maker only - only applies when Stock Types are not in use
Stock > Stock Items	[General] Preferred Vendor	Vendor only - only applies when Stock Types are not in use
Stock > Stock Items	[Vendors] Vendor	Vendor only - only applies when Stock Types are not in use
Purchase > Forms	[General] Vendor	Vendor only
Purchase > Forms	[General] Delivery Address	any; no restriction, skips Not in Use addresses
Purchase > Forms	[General] UDF Address	any; no restriction, skips Not in Use addresses
Purchase > Forms > Options > Line Items > Options > Split	Vendor	Vendor only
Purchase > Forms > Options > Quotations	Vendor	Vendor only
Purchase > Forms > Options > Deliveries	Forwarder	Forwarder only
Purchase > Forms > Options > Deliveries	Destination	any; no restriction, skips Not in Use addresses

Menu	[Tab]/Field	Address Type
Purcahse > Transport Documents	Forwarder	Forwarder only
Purchase > Transport Documents	Destination	any; no restriction, skips Not in Use addresses
Purchase > Contracts	[General] Vendor	Vendor only
Purchase > Custom Clearance Contract	[General] Contractual Partner	any; no restriction, skips Not in Use addresses
Quality > Emergency Response System	Address	any; no restriction, skips Not in Use addresses
Voyage > Cargoes	[Cargo] Charterer	Charterer only

APPENDIX C

Access Control Listings

The following tables list all the access settings available in the Access Control window Registers, Fields, Functions, and Reports/Modules tabs. The settings are listed in the same order as they appear in AMOS.

This chapter includes the following topics:

Registers Tab 330
Fields Tab 357
Functions Tab 364
Reports and Modules Tab 393

SpecTec

Registers Tab

The Access Control window Registers tab contains an alphabetical list (separated by module) of all registers in AMOS Business Suite.

Note: The access controls in this section control visibility of and access to the main window(s) listed for each one. All tabs and sections within the window or subsequent dialogs opened from the main window are covered by the same access control unless an overriding exception (on a field or function, for example) is present. Such exceptions have their own access controls and are listed in the appropriate table.

Registers - Common

Account Code Categories	
Table	AccountCodeCategory
Path	Tools > Configuration > Account Code Categories
Description	A list of account code categories and their types - 'generic', 'balance' or 'class of cost'.
Account Codes	
Table	AccountCode
Path	File > Open Register > General > Account Codes
Description	A list of all account codes and their relationship to major account code categories.
Account Transactions	
Table	AccountLog
Path	Tools > Account Transactions
Description	A list of all account transactions.
Additional Cost	
Table	AdditionalCost
Path	File > Open Register > General > Additional Cost
Description	A list of additional costs to include on purchase forms and charge to budgets, such as Agency Fees, Shipping, Insurance, etc.
Address Category	
Table	AddressCategory
Path	File > Open Register > Address > Address Category
Description	Lists categories for use in the main Addresses register.
Address Grouping	
Table	AddressGrouping
Path	File > Open Register > Address > Address Grouping
Description	Lists groupings for use in the main Addresses register.

Address Relation Type	
Table	AddressRelationType
Path	File > Open Register > Address > Address Relation Types
Description	Lists of 'relation types' for relating various addresses in the main Address register.
Address Type Spare Type QA Grading	
Table	AddressStockTypeQAGrade
Path	File > Open Register > Addresses > Address Type *tab* > View Stock *button* >
Description	For adding a list of stock types to a selected address by type, and applying a QA grade to each listed stock type.
Addresses	
Table	Address
Path	File > Open Register > Addresses
Description	Lists addresses for vendors, deliveries, employees, etc.
Alert Configurations	
Table	AlertsConfigurations
Path	Tools > Configuration > Dashboard Alerts
Description	A list of alert groups and the alerts each group contains, and the access rights for each group.
Approval Limits	
Table	ApprovalLimit
Path	Tools > Configuration > Approval Limits
Description	A global table listing all monetary values for purchase approvals. Usually reserved to system administrators.
Attachment References	
Table	Images
Path	File > Open Register > Attachment > References
Description	Lists references to files (.jpegs, bmps, pdfs, etc.) used as attachments in various registers throughout the system.
Attachment Sources	
Table	Books
Path	File > Open Register > Attachment > Sources
Description	Lists source programs for viewing files in different formats.
Audit Trail Configuration	
Table	AuditTrailConfiguration
Path	Tools > Configuration > Audit Trail Configuration
Description	Specifies lists of tables and columns to audit as well as who can view the resulting audit trail in the Audit Trail Log window (Tools > Audit Trail Log).

Audit Trail Reason	
Table	AuditTrailReason
Path	File > Open Register > General > Audit Trail Reason
Description	Lists predefined reasons to apply to audit trail configurations for selection when changing audited fields.
Company	
Table	InstCompany
Path	Tools > Configuration > Company
Description	A list of registered companies.
Cost Centre Accounts	
Table	CostCentreAccount
Path	Tools > Configuration > Cost Centres > Options > Accounts
Description	A list of all account codes tied to individual cost centres and their corresponding budget code defintions.
Cost Centres	
Table	CostCentre
Path	Tools > Configuration > Cost Centres
Description	A list of all cost centres.
Currency Codes	
Table	Currency
Path	File > Open Register > General > Currency Codes
Description	A global table listing all currencies in use throughout the organisation.
Currency Rates	
Table	CurrencyRate
Path	File > Open Register > Currency Rates
Description	A global table listing the conversion rates for all currencies.
Disciplines	
Table	Discipline
Path	File > Open Register > General > Disciplines
Description	Contains a list of disciplines for assigning work.
Employees	
Table	Employee
Path	File > Open Register > Employees
Description	A list of individual employees used for reporting work, and also in the Personnel system.

Export Log	
Table	ImportExportLog
Path	File > Export/Import > Export Log
Description	Logs all files transferred from the site.
Field Access	
Table	SysModulesFieldAccess
Path	Tools > Configuration > Access Control > Field Access
Description	Lists user-defined field access and descriptions.
Geographical Data	
Tables	WorldRegion; CountryList; Port; VMMSDBerthCodeList; VMMSDBerthList;
Paths	File > Open Register > General > World Regions/Countries/Ports/Berth Type File > Open Register > General > Ports > Options > Berth Management
Description	Lists of world regions; countries; ports; berths - visited or used by company vessels.
Groups	
Table	AmosSysGroups
Path	Tools > Configuration > Access Control > Groups
Description	A global table listing all access user groups and group access rights. Usually reserved to system administrators.
Import Log	
Table	ImportExportLog
Path	File > Export/Import > Import Log
Description	Logs all files transferred to the site.
Installations/Departments	
Table	InstallationDepartment
Path	Tools > Configuration > Installations > Installations/Departments
Description	A global table listing all installations or sites and the departments registered to them. Usually reserved to system administrators.
Job Classes	
Table	JobClass
Path	File > Open Register > General > Job Classes
Description	Lists job classes.
Job Descriptions	
Table	JobDescription/JobDescriptionRevision
Path	File > Open Register > Maintenance > Job Descriptions
Description	Contains descriptions for all jobs.

Job Triggers	
Table	JobTrigger
Path	File > Open Register > General > Job Triggers
Description	Contains descriptions of all job triggers used for generating both Maintenance and Quality work orders.
Locations	
Table	Location
Path	File > Open Register > Locations
Description	Lists all locations used for components and stock items.
Login Audit	
Table	LoginAudit
Path	Tools > View Log In Audit Log
Description	A global table listing all users who logged into AMOS at the current site.
Maintenance Classes	
Table	MaintClass
Path	File > Open Register > Maintenance > Classes
Description	Lists classifications for maintenance work.
Maintenance Criteria	
Table	JobCondition
Path	File > Open Register > Maintenance > Criteria
Description	Lists criteria for performing maintenance work.
Mandatory Fields	
Table	MandatoryField
Path	Tools > Configuration > Mandatory Fields
Description	Specifies any fields which the user is required to fill out when creating order forms, work orders, components and other data; also contains the associated error messages to be presented if the data is lacking.
Modules Menu	
Table	SysModules
Path	Tools > Configuration > Extension Features > Modules Menu
Description	Lists links to external programs or user-defined PowerBuilder modules.
Notification Configuration	
Table	NotificationConfiguration
Path	Tools > Configuration > Notification > Notification Configuration
Description	For configuring mobile devices to send SMS messages from AMOS.

Number Series	
Table	NumberSeries
Path	Tools > Configuration > Number Series
Description	A global table listing number series configured for these tables: Account Transactions; Address; Circular; Claim; Component; Component Type; Contract; Form; Incident; Non-Conformity; Project; Project Job; Purchase Order; Query; Requisition Form; Stock Transaction; Stock Type/Item; Transfer Document; TransportDocument; Voucher; Voyage; Work Order Usually reserved to system administrators.
Overview Panels Configuration	
Table	OverviewPanelConfiguration
Path	Tools > Configuration > Overview Panels Configuration
Description	Controls the configuration of the overview panels and who is allowed to access them.
Permits to Work	
Table	WorkPermit
Path	File > Open Register > Permits to Work
Description	Lists any permits which might be required on individual jobs or work orders prior to allowing work to begin.
Price Classes	
Table	PriceClass
Path	File > Open Register > Stock > Price Classes
Description	Contains formulae for different price classes, used to adjust stock items' values.
Printers Tasks	
Table	SysPrinter
Path	Tools > Configuration > Printer Tasks
Description	Describes special tasks used to print labels and other custom reports.
Product Types	
Table	ProductType
Path	File > Open Register > General > Product Types
Description	Lists the products registered vendors supply. Facilitates searching the Address table.
QA Grades	
Table	QAGrading
Path	File > Open Register > General > QA Grades
Description	Contains a list of grades for rating vendors.
Quality Codes	
Table	QualityCode
Path	File > Open Register > General > Quality Codes
Description	Lists all codes used to record any problems with delivered stock items.

Quality Resolution Code Window	
Table	QualityResolutionCode
Path	File > Open Register > General > Quality Resolution Codes
Description	Lists predefined resolution codes which will be available for selection on closing a claim. Resolutions listed here can be applied to quality codes in the Quality Codes register.
Receipt Status	
Table	ReceiptStatus
Path	File > Open Register > Purchase > Receipt Status
Description	A little-used table containing a list of terms to specify status on individual order lines.
Reports Menu	
Table	SysWindows
Path	Tools > Configuration > Extension Features > Reports Menu
Description	Lists user-defined reports.
Tasks	
Table	ImportExportSchedule
Path	File > Export/Import > Tasks
Description	A global table containing all the import, export and generic tasks.
Templates	
Table	Layout
Path	File > Open Register > General > Templates
Description	Contains a list of customised forms which can be attached to individual data registers to replace the standard blank full-page Details page.
Transaction Codes	
Table	TransCode
Path	Tools > Configuration > Transaction Codes
Description	Lists codes used to connect expenses to a budget's specific sub-set.
Translation	
Table	AmosBabel
Path	Tools > Utilities > Translation
Description	The internal tool for translating text in AMOS.
Units	
Table	Unit
Path	File > Open Register > General > Units
Description	Lists units defined for use with stock and purchase transactions.

Users	
Table	AmosUser
Path	Tools > Configuration > Access Control > Users
Description	A global table listing all AMOS users. Usually reserved to system administrators.
Users Mailbox Access	
Table	WorkFlowMailboxAccess
Path	Tools > Configuration > Users > Options > Mailbox Access
Description	Ties work flow mailboxes to the users who can see into the mailbox. Usually reserved to system administrators.
Vessels	
Table	VesselDetails
Path	File > Open Register > Vessel Details
Description	Contains the basic details of each vessel, such as its name, dimensions, tonnage etc.
Work Flow Configuration	
Table	WorkFlowConfig
Path	Tools > Configuration > Work Flow
Description	For configuration of customised work flows for these modules: Circulars; Claims; Custom Clearance; Incidents; Maintenance; Manuals; Non Conformities; Procedures; Purchase; Quality Work Orders; QuotationCompareScen; RiskMgmtAssessment; RiskMgmtMatrix; RiskMgmtScenario; RiskMgmtScenarioType; SA Configuration; Self Assessment; Voucher Usually reserved to system administrators.
Work Orders	
Table	WorkOrder; QWorkOrder
Path	Maintenance > Work Orders Quality > Work Orders
Description	Lists all maintenance/quality work orders.

Registers - Maintenance

CBM References	
Table	CBMTable
Path	Tools > Configuration > CBM References
Description	Lists reference points for condition-based maintenance entries.
Component Classes	
Table	ComponentClass
Path	File > Open Register > Maintenance > Component Classes
Description	Lists classifications for component types.

Component Types	
Tables	ComponentTypeTab; ComponentTypeHierarchy
Paths	Maintenance > Component Types/Component Types Hierarchy
Description	Lists all component types.
Components	
Tables	ComponentTab; ComponentHierarchy
Paths	Maintenance > Components/Component Hierarchy
Description	Lists all components.
Components; Job Descriptions	
Description	Controls access to the Job Specific Details tab on the Component Jobs window.
Components; Measure Points	
Path	Maintenance > Components > Measure Points *tab*
Description	Lists measure points attached to components.
Counter and Measure Point Types	
Table	CounterType
Path	File > Open Register > General > Counter and Measure Point Types
Description	Lists counters like Hours, RPM, etc., and measure points like Pressure, Temperature, etc., which are in use throughout the organisation.
Criticality Levels	
Tables	Criticality; CriticalityIndicator
Paths	File > Open Register > Maintenance > Function Criticality/Function Criticality Indicator
Description	Lists criticality codes and criticality indicators for assigning on functions.
Failure Descriptors	
Table	FailureDescription
Path	File > Open Register > Maintenance > Failure Descriptors
Description	Lists functions affected by a failure and the related severity.
Failure Detection Methods	
Table	FailureDetectionsMethod
Path	File > Open Register > Maintenance > Failure Detection Methods
Description	Lists descriptions of types of failures.
Failure Effects	
Table	FailureEffect
Path	File > Open Register > Maintenance > Failure Effects
Description	Lists the possible effects of failures.

Failure Modes	
Table	FailureMode
Path	File > Open Register > Maintenance > Failure Modes
Description	Lists how failures can occur.
Failure Severity	
Table	FailureSeverity
Path	File > Open Register > Maintenance > Failure Severity
Description	List of a range of failure severities.
Function Counters	
Table	FunctionCounter
Path	Maintenance > Function/Function Hierarchy > Options > Counters
Description	Lists counter readings for functions.
Functions	
Table	Functions
Path	Maintenance > Functions/Function Hierarchy
Description	Lists all functions.
History	
Tables	History; HistoryArchive
Paths	Maintenance > History; Maintenance > Log > Options > History; Maintenance > Components/Component Hierarchy/Function Hierarchy > Options > Archive > History; Maintenance > Components/Component Hierarchy/Function Hierarchy > Options > Archive > Maintenance Log > Options > History (only with access to 'Maintenance Log'); Maintenance > Work Orders > Options > Component History; Maintenance > Work Orders > Options > Maintenance Log > Options > History
Description	Logs all written history for performed work.
Maintenance Causes	
Table	MaintCause
Path	File > Open Register > Maintenance > Causes
Description	Lists reasons why work is performed.
Maintenance Log	
Tables	MaintenanceLog; MaintenanceLogArchive
Paths	Maintenance > Log; Maintenance > Components/Component Hierarchy/Function Hierarchy > Options > Archive > Maintenance Log; Maintenance > Work Orders > Options > Maintenance Log/Reschedule Log
Description	Logs header information for all maintenance performed.

Maintenance Types	
Tables	MaintType
Path	File > Open Register > Maintenance > Types
Description	Lists types of work performed.
Project Categories	
Table	ProjectCategory
Path	File > Open Register > Maintenance > Project Categories
Description	Lists categories for classifying maintenance projects.
Projects	
Table	Project
Path	Maintenance > Projects
Description	Tracks projects like 'Drydocking' etc.
Reschedule Limits	
Table	RescheduleLimit
Path	File > Open Register > Maintenance > Reschedule Limits
Description	Lists the limits associated with maintenance tasks, within which work can be rescheduled.
Rounds	
Tables	Rounds
Path	Maintenance > Rounds
Description	Lists round maintenance.

Registers - Stock

Location Inventory Log	
Table	LocationInventoryLog
Path	File > Open Register > Stock > Stock Classes
Description	Records stock transactions and logs the date a location has been inventoried.
Stock Classes	
Table	StockClass
Path	File > Open Register > Stock > Stock Classes
Description	Contains a list of stock classes used for categorising stock types.
Stock Grade Categories	
Table	QACodeCategory
Path	Tools > Configuration > Stock Grade Categories
Description	Lists categories for stock grades.

Stock Grades	
Table	QACode
Path	File > Open Register > General > Stock Grades
Description	Lists stock grades.
Stock Items	
Table	SparePart
Path	Stock > Stock Items
Description	Lists all stock items.
Stock Transactions	
Tables	SparePartLog; SparePartLogArchive
Paths	Maintenance > Components > Options > Archive > Maintenance Log > Options > Stock Used (only with access to 'Maintenance Log'); Maintenance > Components > Options > Stock Transactions; Maintenance > Log > Options > Stock Used; Maintenance > Component Hierarchy > Options > Archive > Stock Transactions; Maintenance > Component Hierarchy > Options > Archive > Maintenance Log > Options > Stock Transactions (only with access to 'Maintenance Log'); Maintenance > Function Hierarchy > Options > Archive > Stock Transactions; Maintenance > Function Hierarchy > Options > Archive > Maintenance Log > Options > Stock Transactions (only with access to 'Maintenance Log'); Stock > Transactions
Description	Logs all stock item transactions.
Stock Type Stock Grades	
Table	SpareTypeQACode
Path	Stock > Stock Types > Options > Stock Grades
Description	Lists all stock grades attached to stock types.
Stock Types	
Tables	SpareType; SpareTypeHierarchy
Paths	Stock > Stock Types Stock > Stock Types Hierarchy
Description	Lists all stock types.
Transfer Documents	
Table	TransferDocument
Path	Stock > Transfer Documents
Description	A global table listing all stock transfer requests.
Transfer Reasons	
Table	TransferReason
Path	File > Open Register > Stock > Transfer Reasons
Description	Lists reasons to apply for the transfer of stock items on transfer documents between sites.

Registers - Purchase

Contracts	
Table	Contract
Path	Purchase > Contracts
Description	Lists all purchase contracts.
Custom Clearance Contract	
Table	CustomClearanceContract
Path	Purchase > Custom Clearance Contracts
Description	Lists custom clearance contracts.
Custom Clearance Forms	
Table	CustomClearanceForm
Path	Purchase > Custom Clearance Forms
Description	Lists custom clearance forms.
Custom Clearance Items	
Table	CustomClearanceItem
Path	Purchase > Custom Clearance Forms > Options > Items
Description	Lists custom clearance items.
Delivery Locations	
Table	DeliveryPlace
Path	File > Open Register > Purchase > Delivery Locations
Description	Lists delivery locations for order forms (international port codes recommended).
Delivery Terms	
Table	DeliveryTerm
Path	File > Open Register > Purchase > Delivery Terms
Description	Lists delivery terms for assigning to order forms.
e-Business Formats	
Table	PortalFormat
Path	Tools > Configuration > e-Business Formats
Description	A global table listing all potential formats for sending and receiving data from e-commerce partners.
e-Business Portals	
Table	Portal
Path	Tools > Configuration > e-Business Portals
Description	Lists all potential portals for sending and receiving data from e-commerce partners.

Expense Type	
Table	ExpenseType
Path	File > Open Register > Purchase > Expense Types
Description	Lists categories of expenses related to custom clearance contracts.
Finalise Type	
Table	FinaliseType
Path	File > Open Register > Purchase > Finalise Types
Description	Lists categories of finalisation related to custom clearance contracts.
Forms	
Tables	OrderForm; OrderLine
Paths	Purchase > Forms; Purchase > Forms > Options > Line Items
Description	Lists all order forms and order line information; requires access to at least some of these entries on the Access Control > Registers tab: 'Forms Purchase Orders Active'; 'Forms Requisition Forms Cancelled'; etc. This will grant user access to actual forms in the register - otherwise, this option does nothing.
Forms Deliveries	
Tables	Deliveries; DeliveriesLineItems
Paths	Purchase > Forms > Options > Deliveries; Purchase > Forms > Options > Deliveries > Options > Line Items
Description	Lists all deliveries scheduled for all order forms; lists all delivery lines.
Forms Purchase Orders Active	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to active purchase orders in the Forms register.
Forms Purchase Orders Cancelled	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to cancelled purchase orders in the Forms register.
Forms Purchase Orders Filed	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to filed purchase orders in the Forms register.

Forms Purchase Orders Parked	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to parked purchase orders in the Forms register.
Forms Purchase Orders Split	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to split purchase orders in the Forms register.
Forms Quality Check	
Path	Purchase > Forms > Quality Check *tab*
Description	Controls access to entry of quality claims on order forms on the Forms > Quality Check tab.
Forms Queries Active	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to active query forms in the Forms register.
Forms Queries Cancelled	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to cancelled query forms in the Forms register.
Forms Queries Filed	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to filed query forms in the Forms register.
Forms Queries Parked	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to parked query forms in the Forms register.
Forms Queries Split	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to split query forms in the Forms register.
Forms Requisition Forms Active	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to active requisition forms in the Forms register.

Forms Requisition Forms Cancelled	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to cancelled requisition forms in the Forms register.
Forms Requisition Forms Filed	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to filed requisition forms in the Forms register.
Forms Requisition Forms Parked	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to parked requisition forms in the Forms register.
Forms Requisition Forms Split	
Table	OrderForm
Path	Purchase > Forms
Description	Controls access to split requisition forms in the Forms register.
Order Form Content	
Table	OrderFormContent
Path	File > Open Register > Purchase > Order Form Content
Description	Lists possible types of content on purchase order forms - parts, provisions, etc.
Order Form Origin	
Table	OrderFormOrigin
Path	File > Open Register > Purchase > Order Form Origin
Description	Lists departmental divisions from which order forms can be created - Deck, Engine, Bridge, etc.
Order Line Stock Grades	
Table	OrderLineQACode
Path	Purchase > Forms > Options > Line Items > Options > Stock Grade
Description	Lists all stock grades which have funnelled down from the stock type level and onto order lines.
Order Priority	
Table	Order Priority
Path	File > Open Register > Purchase > Order Priority
Description	Lists priorities to apply to order forms.

Payment Terms	
Table	PaymentTerm
Path	File > Open Register > Purchase > Payment Terms
Description	Lists payment terms to apply to order forms.
Quality Check	
Table	PurchaseClaim
Path	Purchase > Quality Check
Description	Lists all quality checks and claims registered in the system. New entries can be created here; lines can also be placed onto transfer documents.
Quotation Compare Item Code	
Table	QuotationCompareItemCode
Path	File > Open Register > Purchase > Quotation Compare Item Code
Description	Lists predefined item codes for applying in the Quotation Compare Scenario Matrix.
Quotations	
Tables	Quotation; QuotationLine; QuotationCompareScenarios
Paths	Purchase > Forms > Options > Quotations Purchase > Forms > Options > Quotations > Options > Line Items Purchase > Forms > Options > Quotations > Options > Compare
Description	Lists all quotation information as received from vendors; lists all quotation lines; allows creating comparisons between quotations received from different vendors for the same items.
Transport Document	
Table	TransDocFormList
Path	Purchase > Transport Documents
Description	Lists transport documents that track the status of shipments.

Registers - Financial

Budget	
Table	BudgetCode
Path	Financial > Budget
Description	Lists all budget codes in use at a given site.
Budget Code	
Table	BudgetCodeDef; BudgetHierarchy
Paths	Financial > Budget Hierarchy; Tools > Configuration > Budget > Budget Codes
Description	Lists standard budget codes which can be registered at various sites.

Budget Commitment Formula Configuration	
Table	BudgetConfigurationCommitmentFormula
Path	Tools > Configuration > Budget > Budget Commitment Formula
Description	Lists the forecast and committed statuses for each order form type and status.
Budget Prognosis	
Table	BudgetCodePrognosis
Path	Financial > Budget > Options > Prognosis
Description	Contains budget prognosis data used to update the budget throughout the year.
Budget Prognosis Specification	
Table	BudgetCodePrognosisSpecification
Path	Financial > Budget > Options > Prognosis > Options > Specification
Description	Contains the individual expenses that create the specification for a budget code prognosis.
Budget Specification	
Table	BudgetCodeSpecification
Path	Financial > Budget > Options > Specification
Description	Contains the individual expenses which comprise the specification for a budget code.
Voucher Category	
Table	VoucherCategory
Path	Financial > Voucher
Description	Contains financial data received on invoices and credit notes.
Vouchers	
Table	Voucher
Path	Financial > Voucher
Description	Contains financial data received on invoices and credit notes.

Registers - Quality

Circulars	
Table	Circular
Path	Quality > Circulars
Description	Maintains a list of circular documents.
Claim	
Table	Claim
Path	Quality > Claims
Description	Lists all insurance claims in the system.

Conventions	
Table	Convention
Path	Quality > Conventions
Description	Contains all conventions created in the system.
Document Templates	
Table	DocTemplate
Path	File > Open Register > Quality > Document Templates
Description	Register for entering and then creating document templates.
ERS	
Table	ERS
Path	Quality > Emergency Response System
Description	For listing contacts for relevant authorities world-wide to notify in an emergency.
ERS Contact Type	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	Lists types of emergency contact groupings for the ERS window.
ERS External Contacts	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	The External tab on the Contact Types register. Defined Types appear in the External Contacts folder on the Emergency Response System window.
ERS Internal Contacts	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	The Internal tab on the Contact Types register. Defined Types appear in the Internal Contacts folder on the Emergency Response System window.
ERS Vessel Contacts	
Table	ContactTypes
Path	File > Open Register > Emergency Response System > Contact Types
Description	The Vessel Specific tab on the Contact Types register. Defined Types appear in the Vessel Specific Contacts folder on the Emergency Response System window.
Incident	
Table	Accident
Path	Quality > Incidents
Description	For registering incidents and accidents.

Installation Groups	
Table	InstGroup
Path	Tools > Configuration > Installations > Installation Groups
Description	For creating groups and adding installations to them.
Insurance	
Table	Insurance
Path	Quality > Insurance
Description	For listing insurance policies and the related details.
Insurance Category	
Table	InsuranceCategory
Path	File > Open Register > Claims > Insurance Category
Description	For creating categories to group insurance policies into.
Manuals	
Table	Manuals
Path	Quality > Manuals
Description	Contains all quality manuals registered in the system.
Non Conformity	
Tables	NonConf; JobRequisitionQS
Paths	Quality > Non Conformity > Non Conformity; Quality > Non Conformity > Observation
Description	The windows for registering Non Conformities, and Observations (requisitioning work).
Non Conformity Category	
Tables	NonConfSubCat; NonConfMainCat
Paths	File > Open Register > Non Conformity > Category > Main/Sub
Description	One register for defining sub categories; the other for defining main categories and assigning sub categories to each one.
Non Conformity Cause	
Table	NonConfCause
Path	File > Open Register > Non Conformity > Cause
Description	Lists factors which can cause non conformities to occur.
Non Conformity Severity	
Table	NonConfSeverity
Path	File > Open Register > Non Conformity > Severity
Description	Lists varying degrees of severity for applying to registered non conformities.

Non Conformity Type	
Table	NonConfType
Path	File > Open Register > Non Conformity > Type
Description	For registering types of non conformities - i.e. Observation, Major, etc.,- and assigning each one into one or more main categories.
Procedure Categories	
Table	ProcCategory
Path	File > Open Register > Quality Procedures > Categories
Description	For registering a list of categories to group quality procedures into.
Procedure Jobs	
Table	ProcJob
Path	Quality > Procedures > Revisions tab > Jobs *tab* > New/View *button*
Description	Lists jobs linked to the selected procedure and the related job description and information.
Procedures	
Table	Procedure
Path	Quality > Procedures
Description	Lists all quality procedures and procedure documents in the system.
Quality Log	
Table	QualityLog
Path	Quality > Quality Log
Description	Logs work done and history for Quality Work Orders.
Quality/Distribution/Installation	
Table	DistrInstallation
Path	Quality > Distribution > Installation
Description	A window for managing procedure document distribution by installation.
Quality/Distribution/Group	
Table	DistrGroup
Path	Quality > Distribution > Installation Group
Description	A window for managing procedure document distribution by installation group.

Registers - Voyage Management

Cargo Planning	
Table	CargoEdit
Path	Voyage > Cargoes
Description	Control access to the Cargoes window for listing cargo contents and details.

Cargo Reporting	
Table	CargoDetailResp; CargoReportEdit
Path	Voyage > Cargoes > Details *button* > Voyage > Cargoes
Description	Controls access to the Cargo Operations window and the Cargoes window.
Voyage Management Configuration	
Tables	CargoAttrTypeList; CargoTypeList; CargoGroupList; EventTypeList; DelayActivityList; DelayReasonList
Paths	File > Open Register > Voyage Management > Cargo Attribute Type/Cargo Type/Cargo Group/Event Type/Delay Activity/Delay Reason
Description	The Voyage Management setup registers.
Voyage Management Reports	
Table	Report
Path	Voyage > Voyages > Options > Reports > ; Voyage > Voyages > Port Calls *tab* > Details *button* > Options > Reports Voyage > Cargoes > Options > Reports
Description	Gives the ability to run standard Voyage Management reports.
Voyage Planning	
Table	VoyageListEdit
Path	Voyage > Voyages
Description	Controls access to the Voyages window for listing voyages.
Voyage Reporting	
Tables	ChangeStatusPortCallResp; ChangeStatusVoyageResp; SdNoonEdit
Paths	Voyage > Voyages > Port Calls *tab* > Details *button* > Options > Change Port Call Status; Voyage > Voyages > Options > Change Voyage Status > ; Voyage > Voyages > Noon Report *tab* > Details *button* >
Description	Controls access to the Change Port Call Status window; Change Voyage Status window; and Report Noon Report window.

Registers - Personnel

Accounts	
Table	Accounts
Paths	Crewing > Onboard > Accounts > Account Sheets/Templates
Description	Contains account sheets for tracking cash flow on board each vessel, and templates for the account sheets.

Convert Employee Status	
Table	EmployeeConvert
Path	Crewing > Employee > Options > Convert
Description	Employee records are never deleted; instead they are only 'hidden'. Access to this option lets a user convert a 'hidden' employee back to active status.
Other Requirements	The option to convert status is only available (with this access) on the Options menu if the selected employee record is actually hidden. To see 'hidden' employee records the user requires access to 'Crewing - Filter hidden' on the Access Control > Fields tab.
Crew Effects	
Table	CrewEffects
Path	Crewing > Onboard > Administration > Crew Effects
Description	Lists crew members' personal effects.
Employee Accumulator	
Table	Employee
Path	Crewing > Employee > Accumulators *tab*
Description	Lists the employee's accumulating wage types.
Employee Attachment	
Table	Employee
Path	Crewing > Employee > Attachments *tab*
Description	Tab for added employment-related documents to employee records.
Employee Contract	
Table	Employee
Path	Crewing > Employee > Contract *tab*
Description	Keeps track of current and historical employee contracts.
Employee Details	
Table	Employee
Path	Crewing > Employee
Description	Access to the Employee Overview window and the Address dialog opened via the Options menu.
Employee Family	
Table	Employee
Path	Crewing > Employee > Family *tab*
Description	A register listing employee's next of kin and spouse. Also keeps historical records.

Employee Fixed Transaction	
Table	Employee
Path	Crewing > Employee > Fixed Transaction *tab*
Description	Lists the employee's fixed payroll transaction which repeat every payroll period. According to access can use the New/Delete buttons to open the Fixed Transaction window and register/remove a transaction.
Employee Licenses	
Table	Employee
Path	Crewing > Employee > Educ./Lic. *tab*
Description	Lists all employee licenses, training, certifications, courses, etc.
Employee Medical	
Table	Employee
Path	Crewing > Employee > Medical Info. *tab*
Description	Lists employee's medical certificates and documents as well as records of sicknesses and recovery.
Employee Memo	
Table	Employee
Path	Crewing > Employee > Memo tab
Description	A blank tab for adding text information.
Employee Payslip	
Table	Employee
Path	Crewing > Employee > Payslip *tab*
Description	Lists the employee's payslips.
Employee Service Info	
Tables	Employee; ServiceInfo
Path	Crewing > Employee > Service *tab*
Description	Tracks current and historical services, leave days and evaluation records.
Employee Service, Evaluation	
Table	Employee
Path	Crewing > Employee > Service tab - Evaluation *button*
Description	For entering and saving employee evaluations.
Employee Variable Transaction	
Table	Employee
Path	Crewing > Employee > Variable Transaction *tab*
Description	Lists employee payroll transactions which vary from one payroll period to the next. According to access can use the New/Delete buttons to open the Variable Transaction window and register/remove a transaction.

Master Cash	
Table	StockTransaction
Path	Crewing > Onboard > Accounts > Master's Cash
Description	Tracks master's cash amounts and currencies stored onboard.
Payroll Registers	
Tables	WageTypeList; BargaggrList; WageFormula; RegisterAccumulator; RegisterBank; RegisterCurrency; RegisterPeriod; WagescaleList
Paths	File > Open Register > Payroll > Wage Type/Bargain Agreement/Accumulator/Bank/Currency Rounding/Period; File > Open Register > Payroll > Wage Type > Options > Edit Formula; File > Open Register > Payroll > Bargain Agreement > Options > Edit Wage Scale
Description	The Payroll setup registers.
Payroll Transactions	
Tables	VariableTransaction; FixedTransaction
Paths	Crewing > Payroll > Transactions > Variable/Fixed Crewing > Onboard > Transactions > Variable/Fixed
Description	For registering transactions which vary from period to period and those which are fixed at regular intervals. Grants access to the Variable Transaction window and the Fixed Transaction window from the Payroll menu entry and the Onboard menu entry.
Payroll Work Set	
Table	WorkSet
Path	Crewing > Payroll > Work Sets
Description	Lists work sets - groups of employees for whom payroll will be run.
Personnel Registers	
Table	Registers
Path	File > Open Register > Personnel
Description	The Personnel setup registers.
Planning Module	
Table	Schedule
Paths	Crewing > Planning > View Employee Plan/View Rank Plan/View Vessel Plan
Description	The Planning windows for managing crew schedules by employee, rank or vessel.
Ship Stores	
Table	ShipStore
Path	Crewing > Onboard > Administration > Ship Stores
Description	Lists special items registered for customs purposes.

SlopChest Order Forms	
Table	OrderForm
Path	Crewing > Onboard > Slopchest > Order Forms
Description	Lists all the purchase forms - requisitions, queries, and purchase orders - available in regards to AMOS Personnel slopchest purchasing. Only stock items entered in the Slopchest > Stock Items are available for purchasing with these forms. Order forms generated here are not available from the Purchase > Forms window and vice versa.
SlopChest Stock Control	
Table	StockControl
Path	Crewing > Onboard > Slopchest > Stock Control
Description	An inventory window - stock items listed in this window are limited to the Stock Items created in Slopchest > Stock Items.
SlopChest Stock Items	
Table	StockItem
Path	Crewing > Onboard > Slopchest > Stock Items
Description	The Slopchest - Stock Items window lists all items on board the vessel for sale from the slopchest.
SlopChest Stock Transaction	
Table	StockTransaction
Path	Crewing > Onboard > Slopchest > Stock Transaction
Description	Lists slopchest transactions - purchases, sales, losses, etc. - to be taken into account for payroll and to maintain inventory.
Supernumerary	
Table	Passengers
Path	Crewing > Onboard > Administration > Supernumerary
Description	Lists all extra (non-crew) passengers travelling on board.

Registers - Self Assessment

Configuration	
Table	TMSAConfiguration
Path	Tools > Configuration > Self Assessment
Description	Allows users to configure the TMSA elements, sub-elements and KPIs.
Self Assessment	
Table	TMSAAssessment
Path	Assessment > Self Assessment
Description	Allows users to enter self assessment data.

Registers - Mobile

Mobile Consolidate Database	
Table	MobileConsolidatedRegistration
Path	Tools > Mobile > Consolidated DB Registration
Description	Lists consolidated databases for all sites.
Mobile Device Register	
Table	MobileDevice
Path	Tools > Mobile > Mobile Registration
Description	Lists mobile handheld devices.
Mobile Export/Import Tasks	
Table	MobileExpImpTask
Path	Tools > Mobile > Export/Import Tasks
Description	Lists all mobile export/import tasks.
Mobile Subscription Log	
Table	MobileSubscriptionLog
Path	Tools > Mobile > Subscription Log
Description	List of all messages returned by the synchronisation process.
Mobile Synchronisation Configuration	
Table	MobileSynchConfiguration
Path	Tools > Mobile > Mobile Configuration
Description	Lists synchronisation groups and their child outward items which copy data from the AMOS Business Suite to the consolidated database, and incoming items which execute after the tasks have updated the AMOS Business Suite database with data from the consolidated database.

Registers - Risk Management

Matrix	
Table	RiskManagementMatrix
Path	Assessment > Risk Matrix
Description	For configuring likelihood/severity matrices for use with risk assessments.
Registers	
Table	RiskManagementRegister
Path	File > Open Register > Risk Management
Description	The registers to setup risk management.

Scenario	
Table	RiskManagementScenario
Path	Assessment > Risk Scenario
Description	For creating local risk scenarios and scenarios created from types.
Scenario Type	
Table	RiskManagementScenarioType
Path	Assessment > Risk Scenario Type
Description	For creating 'generic' risk scenario types.

Fields Tab

The Access Control window Fields tab is for granting access rights to individual fields throughout the system.

Fields - Common

Account Transaction Number	
Path	Tools > Account Transactions > 'Number'
Description	Gives users the ability to edit the Account Transaction Number. Locked records cannot be edited at all.
Other Required Access	Access to the applicable Cost Centres and Edit access to the Account Transactions Register.
Address - Code	
Path	File > Open Register > Addresses > 'Code'
Description	Gives users the ability to edit the Address Code.
Other Required Access	Edit access to the Address Register.
Job Descriptions - Code	
Path	File > Open Register > Maintenance > Job Descriptions > 'Code'
Description	Gives users the ability to edit the Job Description Code.
Other Required Access	Edit access to the Job Description Register.
Report Work - Mark Work Order as Completed	
Path(s)	Maintenance > Work Orders > Options > Report Work > 'Mark Work Order as Required'; Maintenance > Report Work > 'Mark Work Order as Completed'
Description	Gives users the ability to toggle the 'Mark Work Order as Completed' field on the work order's Details tab when reporting work.
Work Order - Number	
Path	Maintenance > Work Orders > 'Number'
Description	Gives users the ability to edit the Work Order Number.
Other Required Access	Edit access to the Work Order Register.

Fields - Maintenance

Component Type - Marpol Fields	
Path	Maintenance > Component Types > 'IMO', 'Marpol'
Description	Gives users the ability to edit the Component Type user-defined fields for IMO Number and Marpol.
Other Required Access	Edit access to the Component Type register.
Component Type - Number	
Path	Maintenance > Component Types > 'Number'
Description	Gives users the ability to edit the Component Type Number.
Other Required Access	Edit access to the Component Type register.
Component, Counters - Calc. Average Field	
Path	Maintenance > Components > Counters *tab* > 'Calculate Average'
Description	Gives users the ability to toggle the 'Calculate Average' checkbox on the Components window Counters tab and enter an 'Average' counter value without requiring Edit access to the Component register (tab level access).
Component, Counter - Counter	
Path	Maintenance > Components > Counters *tab* > 'Counter' drop-down
Description	Gives users the ability to change the type of 'Counter' on the Counters tab without requiring Edit access to the Component register (tab level access).
Component, Counter - Current Fields	
Path	Maintenance > Components > Counters *tab* > 'Date Read', 'Current Value'
Description	Gives users the ability to edit the 'Date Read' and 'Current Value' fields without having Edit access to the Component register (tab level access).
Component, Counter - Depends On	
Path	Maintenance > Components > Counters *tab* > 'Depends On'
Description	Gives users the ability to edit the 'Depends On' field. The user does not need Edit access to the Component register; however, the Component lookup list will not work without it.
Component, Counter - Start fields	
Path	Maintenance > Components > Counters *tab* > 'Start Date', 'Latest Start Value'
Description	Gives users the ability to edit the 'Start Date' and 'Latest Start Value' fields without having Edit access to the Component register (tab level access).

Component, Counter - Zeroed fields	
Path	Maintenance > Components > Counters *tab* > 'Latest Zeroed Date', 'Total at Zeroed'
Description	Gives users the ability to edit the 'Latest Zeroed Date' and 'Total at Zeroed' fields.
Other Required Access	Edit access to the Component register.
Component - Number	
Path	Maintenance > Components > 'Number'
Description	Gives users the ability to edit the Component 'Number'.
Other Required Access	Edit access to the Component register.
Functions - Function Number	
Path(s)	Maintenance > Functions/Function Hierarchy > 'Number'
Description	Gives users the ability to edit the Function 'Number'.
Other Required Access	Edit access to the Function register.
Project - Estimated Duration Locked	
Path(s)	Maintenance > Projects > 'Locked'
Description	Gives users the ability to lock a project's 'Estimated Duration' field by toggling the 'Locked' checkbox.
Other Required Access	Read and Edit access to the Project register and to the individual project itself.
Projects - Number	
Path	Maintenance > Projects > 'Project No'
Description	Gives users ability to edit the Project 'Number'.
Other Required Access	Read and Edit access to the Project register and to the individual project itself.
Rounds - Code	
Path	Maintenance > Rounds > 'Code'
Description	Gives users the ability to edit the Round 'Code'.
Other Required Access	Edit access to Rounds register.

Fields - Stock

Current Stock	
Path	Stock > Stock Items > 'Current Stock'
Description	Gives users the ability to edit the 'Current Stock' field on the Stock Item window.
Other Required Access	Edit access to the Stock Item register and Execute accesson the function 'Update Stock Quantity'.

Stock Type - Marpol Fields	
Path	Stock > Stock Types > 'IMO', 'Marpol'
Description	Gives users the ability to edit the Stock Type user-defined fields for 'IMO Number' and 'Marpol'.
Other Required Access	Edit access to the Stock Types register.
Stock Type - Number	
Path(s)	Stock > Stock Types/Items > 'Number'
Description	Gives users the ability to edit the Stock Type or Item 'Number'.
Other Required Access	Edit access to the Stock Types register.
Stock Type - Alter Stocked Item	
Path	Stock > Stock Types > Available Stock *tab* > 'Stocked Item'
Description	Gives users the ability to toggle the 'Stocked Item' checkbox on the Stock Types window Available Stock tab.
Other Required Access	Edit access to the Stock Types register.
Transfer Document - Number	
Path	Stock > Transfer Documents > 'Number'
Description	Gives users the ability to edit the Transfer Document 'Number'.
Other Required Access	Edit access to the Transfer Document register.

Fields - Purchase

Contract - Number	
Path	Purchase > Contracts > 'Number'
Description	Gives users the ability to edit the Contract 'Number'-
Other Required Access	Edit access to the Contracts register.
Delivery - Portal Queue	
Path	Purchase > Forms > Options > Deliveries > 'Portal Queue'
Description	Gives users the ability to flag the Delivery window 'Portal Queue' field, and so mark the Transport.QueuedForBusinessToBusiness field in the database. This marks the delivery to be sent with the next portal export.
Other Required Access	Edit access to Forms and Deliveries.
Form - Generic Queue	
Path	Purchase >Forms > 'Generic Queue'
Description	Gives users the ability to flag the Forms window 'Generic Queue' field, and so mark the OrderForm.QueuedForTransfer field in the database.
Other Required Access	Edit access to the Order Form register.

Form - Number	
Path	Purchase > Forms > 'Number'
Description	Gives users the ability to edit the Order Form 'Number'.
Other Required Access	Edit access to the Order Form register.
Form - Ordered Date	
Path	Purchase > Forms > 'Ordered'
Description	Gives users the ability to edit the Form 'Ordered' Date.
Other Required Access	Edit access to the Order Form register.
Form - Portal Queue	
Path	Purchase > Forms > 'Portal Queue'
Description	Gives users the ability to flag the Form's 'Portal Queue' field, and so mark the OrderForm.QueuedForBusinessToBusiness field in the database. This marks the form to be sent with the next portal export.
Other Required Access	Edit access to Forms and Purchase Orders.
Quotation - Portal Queue	
Path	Purchase > Forms > Options > Quotations > 'Portal Queue'
Description	Gives users the ability to flag the Quotation's 'Portal Queue' field, and so mark the Quotation.QueuedForBusinessToBusiness field in the database. This marks the query to be sent with the next portal export.
Other Required Access	Edit access to Forms, Queries and Quotations.
Transport Document - Document No.	
Path	Purchase > Transport Documents > 'Document No.'
Description	Gives users the ability to edit the Transport Document 'Number'.
Other Required Access	Edit access to the Transport Document register.

Fields - Financial

Budget Group - Approval Limit	
Path	Financial > Budget Hierarchy > 'Approval Limit'
Description	Gives users the ability to edit the budget group's 'Approval Limit'.
Other Required Access	Edit access to the Budget Code register.
Budget Group - Approval Warning	
Path	Financial > Budget Hierarchy > 'Approval Warning'
Description	Gives users the ability to edit the budget group's 'Approval Limit'.
Other Required Access	Edit access to the Budget Code register.

Voucher - Voucher No.	
Path	Financial > Voucher > 'Voucher No.'
Description	Gives users the ability to edit the Voucher 'Number'.
Other Required Access	Edit access to the Voucher register.

Fields - Quality

Circular Number	
Path	Quality > Circular > 'Number'
Description	Gives users the ability to edit the circular 'Number'.
Other Required Access	Edit access to the Circulars register.
Claim No	
Path	Quality > Claims > 'Claim Number'
Description	Gives users the ability to edit the 'Claim Number'.
Other Required Access	Edit access to the Claim register.
Incident No	
Path	Quality > Incidents > 'Incident No.'
Description	Gives users the ability to edit the 'Incident No.'.
Non Conformity - Number	
Path	Quality > Non Conformity > Non Conformity > 'Number'
Description	Gives users the ability to edit the non conformity 'Number'.
Other Required Access	Edit access to the Non Conformity register.

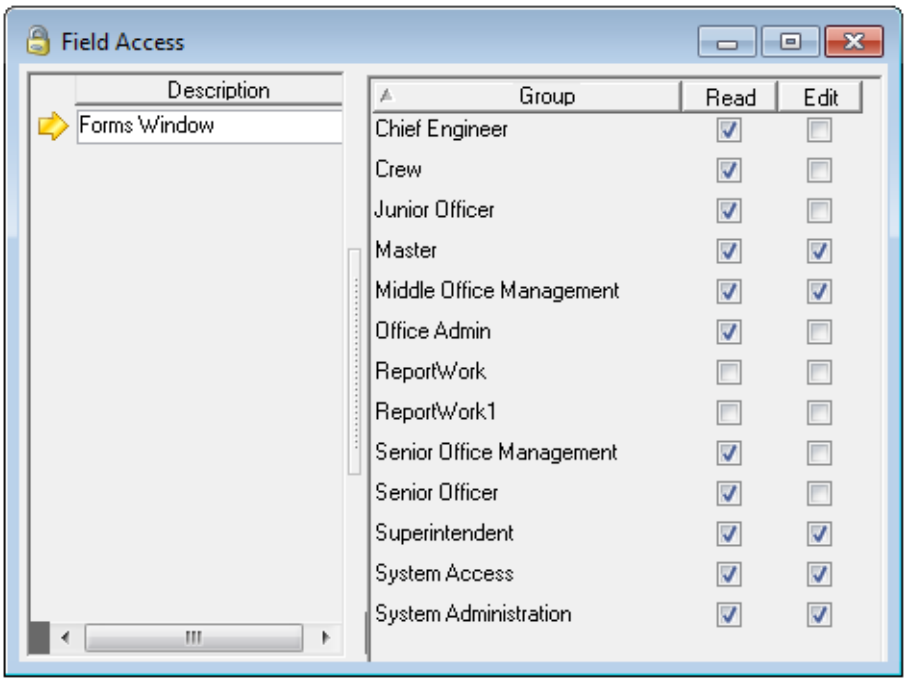
Fields - Personnel

Contract Termination	
Path	Crewing > Employee > Contract *tab* > 'Termination'
Description	The lookup field for selecting a termination reason on an employee's contract.
Other Required Access	Edit access to the Employee Contract register.
Crewing - Filter hidden	
Path	Crewing > Employee > Filter > Basic *tab* > 'Show Hidden' drop-down
Description	The drop-down field to select 'Yes' or 'No' to see hidden employee records when filtering the Employee Overview window. Note that selecting to view hidden records makes the resulting window read-only.

Sickness Recovery	
Path	Crewing > Employee > Medical Info. *tab* > Sickness *button* > Recovered 'Date'
Description	A calendar field for recording the date an employee recovers from a registered illness.
Other Required Access	Edit access to the Employee Medical register.

Granting Access to Protected Fields

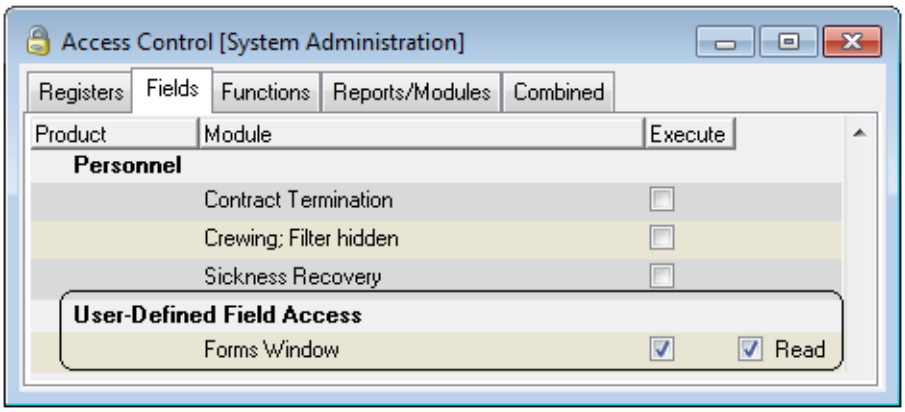
Once you add a field/tab reference to a field access configuration, it is protected and inaccessible until you grant certain user groups access to it. This can be done directly in the Field Access window: after saving the first field access configuration, user groups are listed on the right side of the window. Select a field access configuration and flag **Read** and/**or Edit** access by **Group**:



Checking **Edit** automatically grants **Read** access as well. Checking **Read** allows the user group read only access to the field grouping. The field(s)/tab(s) will be protected from everyone else automatically.

If you've already defined access on one of your field groupings and want to copy exactly those settings to another grouping, select the first one with the defined access. Go to **Options > Copy Access From** and then choose the grouping whose rights you want to copy. When you click **OK** you'll return to the main window and see the access checkboxes flagged on the selected grouping.

Defined access groupings are also listed in the Access Control window Fields tab, accessible from the Groups window:



Select a field access configuration and flag **Read** and/or **Execute** access.

How Does it Work?

- When **Read** and **Execute** are checked, the users in that group will be able to see and edit the relevant fields, according to their group access rights. If they do not have edit access on the window already and you grant edit access on the protected field grouping, the field(s) still remain read-only.
- When only **Read** is checked the users will be able to read but not edit the relevant fields even if they have Edit access rights in that window - unless an expression has been defined on the field allowing editing also.
- If you do not check **Read** (i.e. neither box is checked) the field will be completely hidden even if the group has Read or Edit access for the relevant window. In the case that a tab is defined as unreadable, set the parameter 'Hide Inaccessible Menu Entries' to True to hide the tab. Set it to False to render the tab visible but disabled.

Fields - Risk Management

Scenario Code	
Path	Assessment > Risk Scenario > 'Code'
Description	Gives users the ability to edit the risk scenario 'Code'.
Other Required Access	Edit access to the Scenario register.
Scenario Type Code	
Path	Assessment > Risk Scenario Type > 'Risk Scenario Type'
Description	Gives users the ability to edit the risk scenario type 'Risk Scenario Type' code.
Other Required Access	Edit access to the Scenario Type register.

Functions Tab

The Access Control window Functions tab is for granting rights to execute individual functions throughout the system.

Functions - Common

Access to all disciplines of W.O.	
Path	Maintenance > Work Orders
Description	Overrides the option to 'Auto-filter WO by Discipline' so that users can see all work orders for all disciplines.
Access to all Mailboxes	
Path	Tools > Configuration > Users > Options > Mailbox Access
Description	Gives users the ability to see objects like order forms, work orders, etc., regardless of whose mailbox the objects are in. This function applies only to work flow objects. The advantage to using this function is that it is not necessary to enter which users can see into other user's mailboxes - the access is granted to all the relevant group's members.
Address Convert	
Table	AddressConvert
Path	File > Open Register > Addresses > Options > Convert
Description	Provides the ability to convert an address from the unlocked state to a locked state, as long as the user has Edit access to the Address register. Users with access to 'Edit Locked Addresses' will also be able to convert the address from locked to unlocked.
Other Requirements	Edit access to the Address register.
Allow Windows Login Verification	
Description	Rather than setting the corresponding system parameter which allows global usage of the Windows login functionality, flag this option to set access at user group level instead.
Approve Maintenance Job Descriptions	
Table	JobDescriptionRevisionApproval
Path	File > Open Register > Maintenance > Job Descriptions > Revisions *tab* > Approve *button*
Description	Gives users the ability to approve job description revisions.
Other Requirements	Read access to the Job Description register. The parameter 'Job Description Revision Control' must be set to TRUE for this function to be available.
Audit Trail Log	
Table	AuditTrailLog
Path	Tools > Audit Trail Log
Description	Gives users the ability to view the Audit Trail Log.
Other Requirements	User requires access to the tables specified in the Audit Trail configuration.
Audit Trail Trigger Generation	
Path	Tools > Configuration > Audit Trail Configuration > Options > Generate Triggers...
Description	Gives users the ability to generate the triggers that will populate the Audit Trail Log.

Change Password	
Table	ChangePassword
Path	Tools > Change Password
Description	Gives users the ability to change their own password.
Define Group Field List	
Path	Tools > Options > Predefined Fields *tab*
Description	Gives users the ability to define specific columns (a list of fields) that differ from the default list for a particular screen, and select the group(s) who will see these default columns upon opening that screen.
Define Group Filter Criteria	
Path	Tools > Options > Predefined Filters *tab*
Description	Gives users the ability to define specific filter criteria that differs from the default criteria for a particular filter, and select the group(s) who will see these default criteria when they open that filter.
Define Group Views	
Path	Tools > Options > Views *tab*
Description	Gives users the ability to define specific 'Views' which capture certain filter criteria and field lists, and select the group(s) who will be able to select these views.
Define Private Field List	
Path	Tools > Options > Predefined Fields *tab*
Description	Gives users the ability to define specific columns (a list of fields) that differ from the default list for a particular screen, and that will only apply to the same individual user when he/she opens that screen.
Define Private Filter Criteria	
Path	Tools > Options > Predefined Filters *tab*
Description	Gives users the ability to define specific filter criteria that differs from the default criteria for a particular filter, and that will apply only to the same individual user when he/she opens that filter.
Define Private Views	
Path	Tools > Options> Views *tab*
Description	Gives users the ability to define specific 'Views' which capture certain filter criteria and field lists and that only the same individual user will be able to select to view.
Define System Views	
Path	Tools > Options > Views *tab*
Description	Gives users the ability to define specific 'Views' that capture certain filter criteria and field lists and that will be available for any user to select.
Define System Wide Field List	
Path	Tools > Options > Predefined Fields *tab*
Description	Gives users the ability to define specific columns (a list of fields) that differ from the default list for a particular screen, and that will be apply to all users who can access that screen.

Define System Wide Filter Criteria	
Path	Tools > Options > Predefined Filters *tab*
Description	Gives users the ability to define specific filter criteria that differs from the default criteria for a particular filter, and that will apply to all users who can access that filter.
Delegate Mailbox Access	
Tables	WorkFlowMailboxDelegate; WorkFlowMailboxLog
Paths	Tools > Delegate Mailbox Access; Tools > Mailbox Access Log
Description	Provides the ability to delegate the objects in any user's mailbox to another mailbox. This function applies only to work flow objects, and includes the ability to 'Delegate Private Mailbox Access'.
Delegate Private Mailbox Access	
Tables	WorkFlowMailboxDelegate; WorkFlowMailboxLog
Path	Tools > Delegate Mailbox Access; Tools > Mailbox Access Log
Description	Provides the ability to delegate objects in your own individual mailbox to another user. This function applies only to work flow objects.
Edit Locked Addresses	
Path	File > Open Register > Addressess
Description	Gives Edit access to 'Locked' addresses.
Export	
Table	ManualExport
Path	File > Export/Import > Export
Description	Provides the ability to export data.
Hand Terminal Interface	
Table	HandTerminalInterface
Path	Tools > Hand Terminal Interface
Description	Gives the ability to import a hand terminal file.
Import	
Table	ManualImport
Path	File > Export/Import > Import
Description	Provides the ability to import data.
Maintenance and Stock Analysis	
Paths	Maintenance > Workload Analysis Stock > Stock Analysis
Description	Provides ability to estimate the work load by discipline, or the stock usage for future work.

Maintenance and Stock Forecast	
Tables	AnalysisWorkload; AnalysisStock
Paths	Maintenance > Workload Forecast Stock > Stock Forecast
Description	Provides the ability to forecast the workload by discipline, or the stock usage for future work.
Move Address References	
Table	AddressSelect
Path	File > Open Register > Addresses > Options > Move Address References
Description	Provides the ability to stamp all data belonging to one vendor with another vendor's primary key. This is useful when you have multiple entries for one vendor and you want to consolidate them.
Move User References	
Path	Tools > Configuration > Access Control > Users > Options > Move User References
Description	Provides the ability to stamp all data belonging to one user with another user's primary key. This is useful when you have many entries for users who are no longer with the company and you want to consolidate those users. Usually reserved for system administrators.
Overview Panels Viewer	
Tables	OverviewPanelSelect; OverviewPanelViewer
Path	Tools > Overview Panels
Description	Provides users with the ability to review and select from a list of overview panels to which they have access.
Other Requirements	Access rights to view individual overview panels is set in the Overview Panels Configuration window.
Parameters	
Table	Switch
Path	Tools > Configuration > Parameters
Description	Gives the ability to modify the system's parameters. Usually reserved to system administrators.
Password Crypting	
Table	PasswordScrambler
Path	Tools > Utilities > Password Scrambling
Description	Gives users the right to encrypt the password used to connect to the database.
Permits to Work Issuing	
Table	ChangeWorkPermitStatus
Path	Maintenance > Work Orders > Options > Change Status of Permit to Work
Description	Gives users the right to issue a permit to work in order to report on a work order.

Print Labels	
Tables	NoOfLabels; UsrLabels
Paths	Stock > Stock Items > Options > Print Label Purchase > Forms > Options > Print Label Purchase > Forms > Options > Receive
Description	Gives the ability to print labels for stock items. Requires Read and Edit access to Forms in order to select either the 'Ordered Quantity' or 'Quantity' radio buttons on the list of order forms.
Report Work; Detailed	
Tables	WorkDoneSelect; WorkDone
Paths	Maintenance > Components/Component Hierarchy > Options > Report Work; Maintenance > Function Hierarchy > Options > Report Work; Maintenance > Report Work; Maintenance > Work Orders > Options > Report Work
Description	Gives the ability to report work.
Reports	
Table	RunReport
Path	Tools > Reports
Description	Gives access to the list of standard reports in the system.
Other Requirements	The ability to execute those standard reports is controlled by the settings on the Reports/Modules tab in the Access Control window.
Reschedule Work Orders	
Path	Maintenance > Work Orders
Description	Allows users to edit the 'Due Date' on work orders.
Select View	
Table	ScreenConfigSelect
Path	Tools > Select View
Description	Gives the ability to use shortcuts to access customized views.
Set Idle Time Out	
Path	Tools > Options > General *tab*
Description	Gives the ability to enter a number in the 'Idle Time Out (Min)' box. This number can fall between 0 (no timeout) and 999. Regardless of the entry here, the parameter setting 'Idle Timeout' takes precedence.
Set Multiple Address Type	
Table	AddressSetAddressType
Path	File > Open Register > Addresses > Options > Set Address Type
Description	Gives the ability to open the Set Address Type dialog and define multiple address types for one or more flagged addresses.

Switch Department	
Tables	SelectDepartment; SwitchDepartment
Path	File > Switch Department
Description	Gives users the ability to change from one department to another.
System Administration (Execute SQL)	
Tables	ExecuteSQL; DBAdmin
Paths	Tools > Utilities > Execute SQL/Execute SQL (File)
Description	Allows users to execute SQL scripts in a window within AMOS by using the <Ctrl><Shift><F10> key combination; usually reserved to system administrators.
Other Requirements	The <Ctrl><Shift><F9> key combination allows you to run SQL commands placed in a file with a DBA extension, but to do this you must have Execute access to the Complete System, which gives you access to the entire system regardless.
System Administration (General Info)	
Table	GeneralInfo
Description	Allows users to bring up the General Info. window within AMOS by using the <Ctrl><Shift><F8> key combination; usually reserved to system administrators.
Task Server	
Table	TaskServer2
Path	File > Export/Import > Task Server
Description	Provides the ability to run the task server.
Tasks; Perform Task	
Path	File > Export/Import > Tasks
Description	Provides the ability to run tasks.
Update System License	
Tables	UpdateSystemLicense
Path	File > Update System License...
Description	Gives users the ability to update the system license in the event that new options have been added to the license file; ususally reserved to system administrators. Upgrading functionality requires users to log out of the system before the functionality appears. Downgrading functionality does not.
User Options	
Tables	UserOptions; ScreenConfigSave
Path	Tools > Options
Description	GIves users the ability to change their options and create customised views for looking at data.
User Options; Remote Work Flow	
Path	Tools > Options
Description	Gives users the option to flag the 'Remote Work Flow' checkbox on the General tab. Doing so allows the user to receive remote work flow notifications.

View Image	
Description	Provides the ability to view attachments linked to any of the data registers.
View Price Information; Account Transactions	
Path	Tools > Account Transactions
Description	Provides the ability to view price and currency from the Account Transactions window.
View PSR Reports	
Table	ViewPSRFile
Path	Tools > View PSR Reports
Description	Provides the ability to view reports saved as type PowerSoft Report.
Work Flow, Approve	
Table	WorkFlowApprove
Path	Tools > Configuration > Work Flow > Revision tab > Approve button
Description	Lets users click the button to open the Approve dialog from the Work Flow Configuration window, and approve a new revision.
Other Requirements	Work Flow Configuration revisioning must be in use - set the 'Use Revision' parameter to TRUE.
Work Order Control	
Path	Maintenance > Work Orders
Description	Gives chief engineer the ability to 'control' work orders; that is, to review them upon completion.
Other Requirements	Edit access to the Work Order register.
Work Order Filed	
Path	Maintenance > Work Orders
Description	Gives users the ability to toggle the 'Filed' checkbox on a work order.
Other Requirements	Edit access to the Work Order register.
Work Order Issuing	
Path	Maintenance > Work Orders
Description	Lets users issue work orders.
Other Requirements	Edit access to the Work Order register.
Work Orders Cancellation	
Path	Maintenance > Work Orders
Description	Lets users cancel work orders.
Other Requirements	Edit access to the Work Order register.

Functions - Maintenance

Branch Sort, Component Hierarchy	
Path	Maintenance > Component Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Branch Sort, Component Type Hierarchy	
Path	Maintenance > Component Types Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Branch Sort, Function Hierarchy	
Path	Maintenance > Functions Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Change Component Status	
Table	ComponentChangeStatus
Paths	Maintenance > Components > Options > Change Status; Maintenance > Component Status Log
Description	Provides the ability to change a component's status, assuming that the component is not already 'In Use' in a centralised database. The 'Work Order' field allows for associating the action with an existing work order.
Change Functions Status	
Table	FunctionsChangeStatus
Paths	Maintenance > Functions/Function Hierarchy > Options > Change Status
Description	Provides the ability to change a function's status to 'In Use' or 'Scrapped'.
Change Transferred Component Status	
Table	ComponentChangeStatus
Path	Maintenance > Components > Options > Change Status
Description	Provides the ability to change the status of a 'Transferred' component.
Component Copy	
Path	Maintenance > Components > Options > Copy
Description	Gives the ability to copy components.

Component Job; Field Linkage to Type	
Paths *Description*	Maintenance > Components > Options > Show Indicators/Link All to Type/Remove All Links to Type/ Copy Link from Selected Gives ability to toggle the 'Show Indicators' option. If 'Show Indicators' is flagged, then the user has the ability to select the 'Link All to Type', 'Remove All Links to Type', and 'Copy Link from Selected' options.
Copy Component Type	
Path *Description*	Maintenance > Component Types > Options > Copy Gives the ability to copy component types, as well as registering one component for the new component type.
Counter Log	
Table *Path* *Description*	CompCounterLog Maintenance > Counters > Counter Log Allows user to review logged counter information.
Counters; Overview	
Table *Path* *Description*	CompCounterLog Maintenance > Counters > Overview Allows users to see an overview of current counter information.
Counters; Replace	
Table *Path* *Description*	ComponentsCountersReplace Maintenance > Components > Counters *tab* > Replace *button* Alllows users to replace a counter that does not have a dependency.
Counters; Set Start	
Tables *Path* *Description*	ComponentsCounterSetStart Maintenance > Components > Counters *tab* > Set Start *button* Allows users to set the 'Start Date' and 'Latest Start Value' on a counter. If the 'New Latest Start Value' is not zero then you will see the computed 'Change in Current Value'. To change the 'Current Value' of the counter flag the 'Adjust Current Value' checkbox. To update these values for dependant components, flag the 'Update Depending Counters' checkbox.
Counters; Set Start - Counters with Dependency	
Path *Description* *Other Require-ments*	Maintenance > Components > Counters *tab* > Set Start *button* Allows users to set the 'Start Date' and 'Latest Start Value' on a counter that depends on another counter. Access to the function 'Counters: Set Start'

Counters; Update	
Table	CompCounterUpdate
Paths	Maintenance > Components > Counters *tab* > Update *button*; Maintenance > Counters > Update
Description	Allows users to update the 'Current Value' and 'Date Read' for a counter by entering the 'Current Value' and 'Current Date'. To update these values for dependent components, flag the 'Update Depending Counters' checkbox.
Counters; Update - Counters with Dependency	
Paths	Maintenance > Components > Counters *tab* > Update *button*; Maintenance > Counters > Update
Description	Gives ability to update the 'Current Value' and 'Date Read' on a counter that depends on another counter.
Other Requirements	Access to the function 'Counters: Update'.
Delete Maintenance Task	
Path	Maintenance > Work Planning > Options > Delete Maintenance Tasks
Description	Gives the ability to delete maintenance tasks which do not have any requests for materials attached to them.
Delete Work Order Assessment	
Path	Maintenance > Work Orders > Risk Assessments *tab*
Description	Gives the ability to delete risk assessments listed on the Work Orders window Risk Assessments tab. Allows for deletion of assessments even without delete access on the Work Orders window itself.
Other Requirements	Read and Edit access on the Work Orders register.
Function; Install Component	
Tables	RotationLog
Paths	Maintenance > Functions/Function Hierarchy > Options > Install Component
Description	Gives the ability to install a component on a function.
Function; Remove Component	
Tables	RotationLog
Path	Maintenance > Functions/Function Hierarchy > Options > Remove Component
Description	Gives the ability to remove a component from a function.
Generate Maintenance Task	
Path	Maintenance > Work Planning > Options > Generate Maintenance Tasks
Description	Gives the ability to generate, or create a series of, maintenance tasks.
Job Requisition on Work Order	
Path	Maintenance > Work Orders > Options > Requisition Work on Work Order/Included Jobs *tab* > Requisition *button*
Description	Allows users to create new Requisition work orders directly from any existing maintenance work order and from any included job on a Round work order.

Job Requisitioning	
Table	JobRequisition
Paths	Maintenance > Components/Component Hierarchy/Functions/Function Hierarchy > Options > Requisition Work; Maintenance > Requisition Work
Description	Allows users to create ad hoc work requests for one-time jobs like installation or breakdown maintenance.
Link to Component	
Path	Stock > Stock Items > Options > Link to Component
Description	Gives the ability to link a stock type to a component type from the Stock Items window. Useful in a non-centralised database configuration.
Maintenance Job Planning	
Table	xComponentJobPlanning
Path	Maintenance > Job Planning
Description	Gives access to the graphical Job Planning interface.
Maintenance Planning	
Path	Maintenance > Work Planning.
Description	Gives access to the graphical Work Planning interface.
Manually Trigger Work Order	
Path	Maintenance > Components > Jobs > Options > Create Work Order
Description	Gives users the ability to create a work order directly from the Component Jobs window. Useful in situations where there is counter-based maintenance but no counter readings recorded yet and so, no average running time. In order for the job to show up in the backlog, a work order needs to be generated manually.
Measure Point Log	
Table	CompMeasurePointLog
Path	Maintenance > Measure Points > Measure Point Log
Description	Allows users to review logged measure point information.
Measure Points; Overview	
Table	CompMeasurePointOverview
Path	Maintenance > Measure Points > Overview
Description	Allows users to see an overview of current measure point information.
Measure Points; Update	
Table	CompMeasurePointUpdate
Paths	Maintenance > Components > Measure Points *tab* > Update; Maintenance > Measure Points > Update
Description	Allows users to enter measure point information.

Move Job References	
Path	File > Open Register > Job Descriptions > Options > Move Job References
Description	Provides the ability to stamp all data belonging to one job with another job's primary key. Useful for cleaning up job list.
Order Spares from Maintenance Task	
Path	Maintenance > Work Planning > Options > Order Parts
Description	Gives users the ability to order the required parts attached to a maintenance task.
Other Requirements	Insert access to Forms and to the particular type of Form they want to create (Requisition, Purchase Order, Query).
Project; Copy Project	
Path	Maintenance > Projects > Options > Copy Project...
Description	Allows users access to the Copy Project dialog; to select and copy parts or all of a project.
Project; Create Job(s) from Job Description(s)	
Path	Maintenance > Projects > Options > Create Job(s) from Job Description(s)
Description	Gives access to the menu entry and then the wizard to add job descriptions to project sections.
Project; Create Project Specification	
Path	Maintenance > Projects > Options > Create Project Specification...
Description	Gives access to create and save a project specification.
Project; Move Project Job	
Path	Maintenance > Projects > Options > Move Project Job...
Description	Gives access to the dialog for moving project jobs to another section.
Reschedule Maintenance Task Outside Limit	
Path	Maintenance > Work Planning > Maintenance Tasks > Planned Due Date
Description	Gives the ability to move a task prior to the limit defined in the reschedule limit for that component job. It is not possible to move a job into the future beyond its reschedule limit.
Round; Create Work Order	
Path	Maintenance > Rounds > Options > Create Work Order
Description	Gives the ability to create a work order directly from the Rounds window. One important point to remember when creating round work orders is that there may already be existing work orders in the backlog for jobs that have been attached to the round. These work orders must be cancelled or else there will be a duplication of effort.
Transfer Component In	
Table	ComponentTransferIn
Path	Maintenance > Components > Options > Transfer In
Description	Gives the ability to send a component marked as 'Transferred' to a new department.

Transfer Component Out	
Path	Maintenance > Components > Options > Change Status
Description	Gives the ability to mark a component as 'Transferred'.
Trigger Jobs	
Path	Maintenance > Trigger Jobs
Description	Gives the ability to trigger maintenance jobs that are event-based (as opposed to periodic) to generate work orders for them.
View Measure Point Trend	
Path	Maintenance > Measure Points > Update > Options > Measure Point Trend
Description	Gives access to the Measure Point Trend window.
View Price Information; Report Work	
Paths	Maintenance > Work Orders > Options > Report Work > Stock Used tab; Maintenance > Report Work > Stock Used tab
Description	Provides the ability to view price and currency from the Stock Used tab while reporting work.
Work Order Generation	
Path	Maintenance > Generate Work Orders
Description	Allows users to generate new work orders after a new job has been attached to a component; a new round has been created; or, a component's run-time has been updated and it now has an average value. Useful when a new database is to be installed and the maintenance parameter 'Automatically Reschedule Work Orders' has been switched from TRUE to FALSE.
Works Orders; Copy	
Path	Maintenance > Work Orders > Options > Copy
Description	Gives the ability to copy work orders.
Work Orders; Create Order Form	
Path	Maintenance > Work Orders > Options > Order
Description	Gives the ability to create service line items on order forms from a work order.
Work Orders; Create Sub-Work Order	
Path	Maintenance > Work Orders > Options > Create Sub-Work Order
Description	Gives the ability to create sub-work orders. Sub-work orders receive the same number as their parent work order with a letter designation at the end (-a, b, c, etc.). The main work order cannot be reported on til all subs are completed and filed.

Functions - Stock

Branch Sort, Stock Hierarchy	
Path	Stock > Stock Types Hierarchy
Description	Provides ability to define a custom sort in the hierarchy, to keep groups of items together irrespective of their Name or Number. Allows users to edit the parent fields, drag and drop records to new parents, and change the sort order.
Comp Spare Status	
Table	SpareSetStatus
Path	Maintenance > Component Types > Parts *tab* > Set Status *button*
Description	Gives the ability to change a spare part's status in reference to a component type it is a part of, in the Component Type window. The new status can be applied onto the stock type itself, provided the stock is not registered as an active part of any other equipment.
Depreciation Levels	
Table	SpareDepreciation
Path	Tools > Configuration > Depreciation Levels
Description	Gives access to the global table that lists the five depreciation levels.
Edit Inactive Stock Details	
Path	Stock > Stock Types
Description	Provides the ability to edit the details on inactive stock types (types with status set to Scrapped or Obsolete).
Other Require-ments	Access to 'View Inactive Stock Details'
Edit Submitted Transfer Documents	
Path	Stock > Transfer Documents
Description	Gives the ability to edit transfer documents after they have been submitted.
Permit to take a Spare Even When Over-booked	
Paths	Stock > Stock Items > Options > In/Out of Stock; Stock > Control; Stock > In/Out of Stock
Description	Gives the ability to take out stock items that have been booked on work orders.
Reverse Stock Transaction	
Path	Stock > Transactions > Options > Reverse Transaction
Description	Gives users the ability to reverse stock transactions in case of error. Usually reserved to system administrators.

Stock Control	
Table	InventoryControl
Paths	Stock > Stock Items > Options > In/Out of Stock/Move; Stock > Control; Stock > In/Out of Stock
Description	Gives users the ability to update inventory.
Stock Item Status	
Table	SpareSetStatus
Path	Stock > Stock Items > Options > Set Status
Description	Gives the ability to change the status on one or more selected individual stock items.
Stock Optimiser	
Path	Stock > Stock Optimiser
Description	Gives users the ability to run the Stock Optimiser program.
Stock Type Status	
Table	SpareSetStatus
Path	Stock > Stock Types > Options > Set Status
Description	Gives the ability to change the status on one or more stock types. The status change can reflected on items of the type.
Stock Type; Link to Component Type	
Path	Stock > Stock Types > Options > Link to Component
Description	Gives users the ability to link a stock type to a component type from the Stock Type window. Useful in a centralised database configuration.
Stock Type; Register as Stock Item	
Path	Stock > Stock Types > Options > Register as Stock Item
Description	Gives the ability to register a stock type as a stock item.
Stock Wanted	
Table	Requisition
Path	Stock > Wanted
Description	Gives the ability to use the Stock Wanted list for ordering.
Stock Wanted; Calculate Wanted	
Table	RequisitioningAuto
Path	Stock > Wanted > Options > Calculate Wanted Quantities
Description	Gives the ability to calculate the 'wanted' stock quantity based on reorder level/re-order quantity/minimum level/maximum level.
Transfer Document; Approve	
Path	Stock > Transfer Documents > Options > Change Approval
Description	Gives the ability to approve transfer documents after they have been submitted.

Transfer Document; Receive	
Table	TransferLineReceive
Path	Stock > Transfer Documents > Options > Receive
Description	Gives the ability to receive transfer documents at the recipient installation.
Transfer Document; Submit	
Path	Stock > Transfer Documents > Options > Submit
Description	Gives the ability to submit transfer documents.
Transfer Document; Transfer	
Table	TransferLineTransfer
Path	Stock > Transfer Documents > Options > Transfer
Description	Gives ability to edit transfer documents after they have been submitted.
Transfer Documents; Create Order Form	
Path	Stock > Transfer Documents > Options > Line Items > Options > Create Order Form
Description	Gives the ability to create order forms from the Line Items on transfer documents.
Update Stock Quantity	
Path	Stock > Stock Items
Description	Gives users the ability to update the 'Current Stock' field on the Stock Items window. Generally to be avoided because all quantity updates should create a stock transaction and updating this field does not do that.
Other Requirements	Edit access to the Stock Items register and access to the 'Current Stock' field.
View Component Type; Stock Items	
Path	Maintenance > Component Types > Parts *tab* > View *button*
Description	Provides the ability to view stock items from the Component Type's Parts tab.
View Inactive Stock Details	
Paths	Stock > Stock Types/Items
Description	Provides the ability to view inactive stock types/items (stock with status set to Scrapped or Obsolete).
View Price information; In/Out of Stock	
Path	Stock > In/Out of Stock
Description	Provides the ability to view price and currency from the In/Out of Stock window.
View Price Information; Multi Vendor	
Paths	Stock > Stock Types/Items > Vendors *tab*
Description	Provides the ability to view price and currency from the Stock Types/Items window Vendors tab.

View Price Information; Stock	
Path	Stock > Stock Items
Description	Provides the ability to view the 'Last Purchase Price' and currency, and 'Average Price' and currency from the Stock Item window.
View Price Information; Stock Transactions	
Path	Stock > Stock Transactions
Description	Provides the ability to view a transaction's price and currency from the Stock Transactions window.
View Price Information; Stock Type	
Path	Stock > Stock Types
Description	Provides the ability to view the 'Last Purchase Price' and currency from the Stock Types window.
View Price Information; Stock Wanted	
Path	Stock > Wanted
Description	Provides the ability to view the 'Last Purchase Price' and currency from the Stock Wanted window.

Functions - Purchase

Allow Editing Forms of all Origin	
Path	Purchase > Forms
Description	If one or more form 'origins' is assigned to a user or his/her group, he/she can only edit forms coming from those origins, as well any forms without an origin assigned. Flag this setting to allow users to edit any purchase form regardless of its origin.
Allow Selecting Blacklisted Vendors	
Paths	Purchase > Forms; Purchase > Forms > Options > Quotations
Description	Provides an additional lookup button next to the 'Vendor' field on the Forms window and Quotations window. Clicking this button will open a vendor list which includes blacklisted vendors (otherwise unavailable for selection).
Approve Purchase Order Beyond Budget Control Limit	
Path	Purchase > Forms
Description	When budget control limits are in place, flagging this setting allows users to bypass budget value limits and warnings defined against a budget group and approve purchase order forms which are over the limit.
Other Requirements	Access to 'Forms Approval Purchase Orders'.
Approve Quotation Scenario	
Path	Purchase > Forms > Options > Quotations > Options > Compare > Options > Approve...
Description	Allows users to select 'approve' on a quotation comparison scenario, thereby making it available for possible selection.

Approve Requisition Form Beyond Budget Control Limit	
Path	Purchase > Forms
Description	When budget control limits are in place, flagging this setting allows users to bypass budget value limits and warnings defined against a budget group and approve requisition forms which are over the limit. Access to 'Forms Approval Requisition Forms'.
Contract Approval	
Table	ContractApproval
Path	Purchase > Contracts > Options > Approve...
Description	Allows users to grant approval to purchase contracts.
Contract Issuing	
Table	ContractIssuing
Path	Purchase > Contracts > Options > Issue
Description	Provides the ability to issue purchase contracts.
e-Business Portal; Tamper Control	
Table	PortalTamperControl
Path	Tools > Configuration > e-Business Portals > Options > Tamper Control
Description	Provides the ability to check if an e-Business document has been tampered with. If the portal setting AddCheckSum is TRUE, then a comment used for tamper control is inserted into the document. If the result of a tamper control check is 'No CRC' or 'Tampered', then the file has been tampered with.
Other Requirements	If the portal setting AddCheckSum is FALSE, then checking for tampering is meaningless.
Edit Approved Purchase Orders	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock Approved Purchase Orders' allowing users to edit purchase orders after approval.
Edit Approved Purchase Orders Below Approval Limit	
Path	Purchase > Forms
Description	Provides the ability to edit approved purchase orders below the approval limit of the group the user belongs to. Revoking approval is not possible without ability to 'Edit Approved Purchase Orders', 'Forms Approval Purchase Orders' and 'Approve Purchase Orders Beyond Budget Control Limit'.
Edit Approved Requisition Below Approval Limit	
Path	Purchase > Forms
Description	Provides the ability to edit approved requisition forms below the approval limit of the group the user belongs to. Revoking approval is not possible without the ability to 'Edit Approved Requisition Forms', 'Forms Approval Requisition Forms', and 'Approve Requisition Forms Beyond Budget Control Limit'.

Edit Approved Requisition Forms	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock Approved Requisition Forms' allowing users to edit requisitions after approval.
Edit Exported Requisition Forms	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock Exported Requisition Forms' allowing users to edit requisition forms after export.
Edit 'Ordered' Form Fields	
Path	Purchase > Forms
Description	Overrides parameter to 'Lock 'Ordered' Form Fields' allowing users to edit these fields after a form has been ordered.
Form Release From Contract	
Table	OrderFormReleaseContract
Path	Purchase > Forms > Options > Release from Contract
Description	Gives users the ability to release an order form from a purchase contract.
Forms Approval Purchase Orders	
Table	OrderFormApproval
Path	Purchase > Forms > Options > Approve
Description	Gives users the ability to approve queries/purchase orders, the second level of approval prior to actual purchase.
Forms Approval Requisition Forms	
Table	OrderFormApproval
Path	Purchase > Forms > Options > Approve
Description	Gives users the ability to approve requisition forms, the first level of approval, usually on-board a vessel.
Forms Convert	
Table	ConfirmConvert
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert order forms.
Forms Convert Purchase Orders	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert purchase orders.
Forms Convert Queries	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert queries.

Forms Convert Requisition Forms	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert requisition forms.
Forms Convert to Purchase Orders Active	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to an active purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Cancelled	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a cancelled purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Filed	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a filed purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Parked	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a parked purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Purchase Orders Split	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a split purchase order.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Active	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to an active query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Cancelled	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a cancelled query.
Other Requirements	Edit access to the type and status of form being converted.

Forms Convert to Queries Filed	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a filed query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Parked	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a parked query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Queries Split	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a split query.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Active	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to an active requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Cancelled	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a cancelled requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Filed	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a filed requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Convert to Requisition Form Parked	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a parked requisition form.
Other Requirements	Edit access to the type and status of form being converted.

Forms Convert to Requisition Form Split	
Path	Purchase > Forms > Options > Convert
Description	Gives the ability to convert a form to a split requisition form.
Other Requirements	Edit access to the type and status of form being converted.
Forms Copy	
Table	OrderFormCopy
Path	Purchase > Forms > Options > Copy
Description	Gives ability to copy order forms.
Forms Deliveries; Split	
Table	DeliveriesSplit
Path	Purchase > Forms > Options> Deliveries > Options > Line Items > Options > Split Deliveries
Description	Gives ability to split line items from one delivery to another.
Forms Print Copy Letter of Rejection	
Path	Purchase > Forms > Options > Print > Printer Form (Copy) > Letter of Rejection
Description	Provides ability to print copies of Letters of Rejection for quotations which were not accepted by the buyers.
Forms Print Copy Purchase Orders	
Path	Purchase > Forms > Options > Print > Printed Form (Copy) > Form/Reclamation Claim
Description	Provides ability to print copies of purchase orders and reclamation claims.
Forms Print Copy Queries	
Path	Purchase > Forms > Options > Print > Printer Form (Copy) > Form
Description	Provides ability to print copies of queries.
Forms Print List Letter of Rejection	
Path	Purchase > Forms > Options > Print > List > Letter of Rejection
Description	Provides ability to print a list of Letters of Rejection for quotations that have not been accepted by the buyers.
Forms Print List Purchase Orders	
Path	Purchase > Forms > Options > Print > List
Description	Gives ability to print a list of purchase orders.
Forms Print List Queries	
Path	Purchase > Forms > Options > Print > List
Description	Gives ability to print a list of queries.

Forms Print List Requisition	
Path	Purchase > Forms > Options > Print > List
Description	Gives ability to print a list of requisition forms.
Forms Print Original Letter of Rejection	
Path	Purchase > Forms > Options > Print > Printed Form (Original) > Letter of Rejection
Description	Provides ability to print originals of Letters of Rejection for quotations that have not been accepted by the buyers. Printing an original Letter of Rejection populates the 'Rejected' date field (Quotation.RejectedDate) in the History section of the Quotation header. It is a good idea to enter the name of the person rejecting the quote using the drop-down list beside the date prior to printing.
Forms Print Original Purchase Orders	
Path *Description*	Purchase > Forms > Options > Print > Printed Form (Original) > Form/Reclamation Claim Provides ability to print original purchase orders and reclamation claims. Printing an original purchase order populates the 'Ordered' date field (OrderForm.OrderedDate) in the History section of the Form header. Printing an original reclamation claim populates the 'Claims Date' field (QualityCheckLog.ClaimDate) on the line item's Quality Check tab.
Forms Print Original Queries	
Path	Purchase > Forms > Options > Print > Printed Form (Original) > Form
Description	Provides ability to print original queries. Printing an original query populates the 'Sent' date field (Quotation.SentDate) in the History section of the Quotation header.
Forms Print Requisition	
Path	Purchase > Forms > Options > Print
Description	Gives users access to print originals or copies of requisition forms. Since requisitions are not considered legal documents in AMOS and no fields are populated when the forms are printed, there are not separate options to print originals and queries.
Forms Printing	
Table	OrderFormPrint
Path	Purchase > Forms > Options > Print
Description	Gives users access to the Print option for Order Forms.
Other Requirements	Access to individual print functions to allow printing.
Forms Quotation Select	
Path	Purchase > Forms > Options > Quotations > Options > Select
Description	Gives users the opportunity to select the quotation with the best combination of prices and delivery times.

Forms Receive	
Table	OrderFormReceipt
Path	Purchase > Forms > Options > Receive
Description	Gives users the ability to receive purchase orders.
Forms; Allow Spot Buy Off Contracts	
Path	Purchase > Forms > Options > Line Items > New
Description	Gives ability to select both contracted and noncontracted stock items on order forms not based upon a contract. If you only want contracted stock items to be purchased on order forms that have a contract applied to them, then do not allow this access. Order forms that are based upon a contract typically allow only contracted stock items to be selected.
Order Lines; Sort Items	
Path	Purchase > Forms > Options > Line Items > Options > Sort Items
Description	Gives ability to sort order lines.
Propose Quotation Scenario	
Path	Purchase > Forms > Options > Quotations > Options > Compare > Options > Propose...
Description	Allows users to select 'propose' on a quotation comparison scenario, thereby making it available for possible approval and selection.
Quotation Compare, Line Quantity	
Table	QuantityRequest
Path	Purchase > Forms > Options > Quotations > Options > Compare > Award *button*
Description	Allows access to the Specify Quantity dialog in the Quotation Compare window, for awarding a quantity of a line item to a particular vendor.
Other Requirements	Flag 'Awarded Quantity' on the Configuration tab to show the button in the Compare tab.
Quotation Compare, History Add	
Path	Purchase > Forms > Options > Quotations > Options > Compare > History *tab* > New *button*
Description	Gives access to the New button on the Quotation Compare window History tab so the user can add history to a comparison, regardless of access to the Quotation Compare window itself.
Quotation Compare, History Delete	
Path	Purchase > Forms > Options > Quotations > Options > Compare > History *tab*> Delete *button*
Description	Gives access to the Delete button on the Quotation Compare window History tab so the user can remove history from a comparison, regardless of access to the Quotation Compare window itself.

Select Quotation Scenario	
Path	Purchase > Forms > Options > Quotations > Options > Compare > Options > Select...
Description	Allows users to 'select' a quotation comparison scenario.
View Price information; Forms Receive	
Path	Purchase > Forms > Options > Receive
Description	Provides the ability to view the price and currency when receiving forms.
View Price information; Line Items	
Path	Purchase > Forms > Options > Line Items
Description	Provides the ability to view the line item price and currency.
View Purchase History	
Table	SparePartLogPurchase
Path	Stock > Stock Items/Stock Types > Options > Purchase History Purchase > Forms > Options > Line Items > Options > Purchase History
Description	Gives access to open and view the records in the Purchase History window.

Functions - Financial

Allow to Update Order Form Budget from Voucher	
Path	Financial > Voucher
Description	Gives access to open a lookup from the 'Budget Code' field on the Voucher window. Budget codes are usually inherited read-only from the order form the voucher belongs to. Access to the lookup gives the user ability to override the order form budget from the Voucher window.
Budget Approve Codes	
Path	Financial > Budget > Options > Convert
Description	Gives users the ability to convert budget codes to an 'Approved' status.
Budget Breakdown	
Tables	BudgetBreakdownPurchase/Stock/Maintenance
Path	Financial > Budget > Options > Breakdown
Description	Gives access to the three (Maintenance, Stock and Purchase, according to budget class) Budget Breakdown windows.
Budget Convert Codes	
Table	BudgetConvert
Path	Financial > Budget > Options > Convert
Description	Gives users the ability to convert budget codes from a 'Preliminary' to a 'Parked' status and vice-versa, but not to an 'Approved' status. Execute access on 'Budget Approve Codes' is required to convert to approved status.
Other Requirements	Edit access to the Budget register to use this option.

Budget Copy	
Table	BudgetCodeCopy
Path	Financial > Budget > Options > Copy
Description	Provides ability to copy budget codes, most often used to generate new budget codes for the upcoming financial year based on the previous year's budget codes.
Budget Modify Approved Codes	
Path	Financial > Budget
Description	Provides ability to modify information on 'Approved' budget codes.
Budget Prognosis Approve	
Path	Financial > Budget > Options > Prognosis > Options > Convert
Description	Gives users the ability to convert budget code prognoses to an 'Approved' status.
Budget Prognosis Convert	
Table	BudgetPrognosisConvert
Path	Financial > Options > Prognosis > Options > Convert
Description	Gives users the ability to convert budget code prognoses from a 'Preliminary' to a 'Parked' status and vice-versa.
Budget Prognosis Modify Approved	
Path	Financial > Budget > Options > Prognosis
Description	Gives ability to edit information on 'Approved' budget code prognoses.
Budget Recalculate	
Table	BudgetCodeRecalc
Path	Financial > Budget > Options > Copy
Description	Gives ability to recalcuate the Committed, Paid and Total columns in the event that the existing amounts are incorrect.

Functions - Quality

Incident Report Close	
Path	Quality > Incidents > Options > Close
Description	Activates the option to close currently open incident reports.
Incident Report Reopen	
Path	Quality > Incidents > Options > Reopen
Description	Activates the option to reopen incident reports which have already been closed.
Manual Export	
Table	QSManualExport
Path	Quality > Manuals > Options > Export...
Description	Gives the ability to export a manual and choose the location for it.

Procedure Document	
Table	ProcedureDocument
Path	Quality > Procedures
Description	Allows a user without any access to the Procedures register, to open the Procedures window for read-only viewing of the currently issued revision of each procedure document. There is no Revisions tab on the window and the Documents tab only displays the actual document itself and no list of revisions or options to compare. Jobs, Manuals and Conventions, References and Attachments are listed in read-only format and no record of distribution is available.
Other Requirements	To maintain the read-only procedure document view, do not assign any access to the Procedures register itself.
Procedure Print	
Table	PrintProc
Path	Quality > Procedures > Print *button*/File > Print
Description	Gives the ability to select and print out procedure documents.
Trigger Jobs	
Table	TriggerJob
Path	Quality > Trigger Jobs
Description	Gives the ability to trigger jobs and so create quality work orders for procedure jobs linked to triggers.
Work Order Generation	
Table	QWOGeneration
Path	Quality > Generate Work Orders
Description	Gives the ability to generate the first quality work orders for periodic procedure jobs.

Functions - Voyage Management

Add Cargo to Voyage	
Path	Voyage > Cargoes > Options > Assign Cargo to Voyage
Description	Allows users to add a cargo registration to a defined voyage, in the Cargoes window.
Change Port Call Status	
Path	Voyage > Voyages > Port Calls *tab* > Details *button* > Options > Change Port Call Status
Description	Allows users to change the status on the port call selected in the Port Calls tab on the Voyages window.
Change Voyage Status	
Path	Voyage > Voyages > Options > Change Voyage Status
Description	Allows users to change the status on a voyage selected in the Voyages window.

Create Planned Cargo Operation	
Path	Voyage > Voyages > Port Calls *tab* > Details *button* > Cargo *tab* > Report Cargo *button* > (Report Cargo window) New Cargo Operations *button*
Description	Allows users to access and create planned cargo operations.
Create Voyage from Cargo	
Path	Voyage > Cargoes > Options > Voyage from Cargo
Description	Allows users to create a voyage from a defined cargo, in the Cargoes window.
Remove Cargo	
Path	Voyage > Cargoes > Options > Remove Cargo from Voyage
Description	Allows users to remove a cargo registration from a defined voyage, in the Cargoes window.
Tender, Notice of Readiness	
Path	Voyage > Voyages > Port Calls *tab* > Details *button* > Cargo *tab* > Tender NoR *button*
Description	Allows access to the Tender, Notice of Readiness report.

Functions - Personnel

Add and Remove Employee Documents	
Path	Crewing > Employee
Description	Activates the New and Delete buttons in the relevant tabs to allow users to add and remove employee documents like medical certificates, passports, licenses, etc.
Other Requirements	Adding/Removing medical documents (Medical Info. tab) requires Insert/Delete access to the 'Employee Medical' register. Adding/Removing licences and certificates (Educ./Lic. tab) and passports or visas (Pass./Visa tab) requires Insert/Delete access to the 'Employee Licenses' register.
Check Expiry	
Table	DocumentExpiry
Path	Crewing > Expired > Licenses/Medical Certificates/ID Books/Services
Description	Gives access to the four Document Expired windows.
Close Period	
Table	ClosePeriod
Paths	Crewing > Payroll > Close Period Crewing > Employee > Options > Close Period
Description	Lets users close the current payroll period.
Generate and Confirm Service	
Tables	NewService; CrewChange
Paths	Crewing > Employee > Service *tab* > Generate *button* Crewing > Planning > View Employee/Rank Plan > Options > Generate Service
Description	Allows access to the Generate Service dialog.

List Unplanned Crew	
Path	Crewing > Employee > *filter*
Description	Allows access to the 'Unplanned Crew' checkbox on the bottom right corner of the Employee window filter. Flagging it will include crew members without a service plan in place, in the filtered Employee window.
Run Payroll	
Path	Crewing > Employee > Options > Run Payroll; Crewing > Payroll > Worksets > Options > Run Payroll
Description	Activates the option to run payroll for selected employees and worksets.

Functions - Mobile

Mobile Access	
Description	Gives users the ability to access AMOS Mobile on the designated handheld device. Mobile devices are listed at Tools > Mobile > Mobile Registration.

Reports and Modules Tab

The Access Control window Reports and Modules tab is for granting rights to run standard reports and user-defined reports and external modules.

Reports/Modules - Common

Address Reports	
Path	Tools > Reports > Address Reports
Description	Gives the ability to run all standard reports in the Address Reports folder.
MARPOL	
Path	Tools > Reports > MARPOL Reports
Description	Gives the ability to run all standard reports in the MARPOL Reports folder.

Reports/Modules - Maintenance

Bureau Veritas, Audit Trail Reports	
Path	Tools > Reports > Bureau Veritas - Audit Trail Reports
Description	Gives the ability to run all standard reports in the Audit Trail Reports folder.
Component Reports	
Path	Tools > Reports > Component Reports
Description	Gives the ability to run all standard reports in the Component Reports folder.

History Reports	
Path	Tools > Reports > History Reports
Description	Gives the ability to run all standard reports in the History Reports folder.
Jobs	
Path	Tools > Reports > Jobs Reports
Description	Gives the ability to run all standard reports in the Jobs Reports folder.
Maintenance Reports	
Path	Tools > Reports > Maintenance Reports
Description	Gives the ability to run all standard reports in the Maintenance Reports folder.

Reports/Modules - Stock

Stock Items	
Path	Tools > Reports > Stock Items Reports
Description	Gives the ability to run all standard reports in the Stock Items Reports folder.

Reports/Modules - Purchase

Custom Clearance	
Path	Tools > Reports > Custom Clearance Reports
Description	Gives the ability to run all standard reports in the Custom Clearance Reports folder.
Forms and Requisitioning	
Path	Tools > Reports > Forms and Requisitioning Reports
Description	Gives the ability to run all standard reports in the Forms and Requisitioning Reports folder.
Transport Documents	
Path	Tools > Reports > Transport Documents Reports
Description	Gives the ability to run all standard reports in the Transport Documents Reports folder.

Reports/Modules - Financial

Budget Reports	
Path	Tools > Reports > Budget Reports
Description	Gives the ability to run all standard reports in the Budget Reports folder.

Reports/Modules - Quality

Emergency Response System	
Path	Tools > Reports > Emergency Response System
Description	Gives the ability to run all standard reports in the Emergency Response System folder.
Non-Conformities	
Path	Tools > Reports > Non Conformities
Description	Gives the ability to run all standard reports in the Non Conformities folder.
Quality Procedures	
Path	Tools > Reports > Quality Procedures
Description	Gives the ability to run all standard reports in the Quality Procedures folder.

Reports/Modules - Personnel

Employee Reports	
Path	Tools > Reports > Employee Reports
Description	Gives the ability to run all standard reports in the Employee Reports folder.
Personnel Office Reports	
Path	Tools > Reports > Personnel Office Reports
Description	Gives the ability to run all standard reports in the Personnel Office Reports folder.
Personnel Onboard Reports	
Path	Tools > Reports > Personnel Onboard Reports
Description	Gives the ability to run all standard reports in the Personnel Onboard Reports folder.

Reports/Modules - Self Assessment

Statistics N/A	
Path	Tools > Reports > Statistics Reports
Description	Gives the ability to run all standard reports in the Statistics Reports folder.

INDEX

A

Access Control 94
- Common Fields 357
- Common Functions 365
- Common Registers 330
- Financial Fields 361
- Financial Functions 389
- Financial Registers 346
- Maintenance Fields 358
- Maintenance Functions 372
- Maintenance Registers 337
- Mobile Functions 393
- Mobile Registers 356
- Personnel Fields 362
- Personnel Functions 392
- Personnel Registers 351
- Purchase Fields 360
- Purchase Functions 381
- Purchase Registers 342
- Quality Fields 362
- Quality Functions 390
- Quality Registers 347
- Risk Management Fields 364
- Risk Management Registers 356
- Self Assessment Registers 355
- Stock Fields 359
- Stock Functions 378
- Stock Registers 340
- Voyage Management 391
- Voyage Management Registers 350

Access Control Combined Access 98

Access Control Fields Tab 98, 357

Access Control for Reports and Modules 98, 393

Access Control Functions Tab 98, 364

Access Control on Fields 98, 357

Access Control on Functions 98, 364

Access Control Reports, Modules Tab 98, 393

Access Control to Registers Tab 98, 330

Access Modules 308
- Group Access 310

Access on Templates 293

Access Rights to Templates 293

SpecTec

Access to Action 162
Access to Audit Trails 181
Access to Transformations 162
Account Code Categories 177
Account Code Categories Register 67, 177
Account Codes 177-178
Account Codes Register 23
Account Transactions 176, 178
Accounting Parameters 131
Accumulators Register 65
Activate Job Description 25
Activate Reason Codes 24
Activate Revision Functionality 166
Activate User Defined Fields 158
Activating an Audit Trail 189
Activating Installations/Departments 74
Activating Work Flow Configuration Revisions 167
Activity Register 58
Add a Report to the Hierarchy 304
Add Attachments with the New Button 275
Add Attachments without a Reference 272
Adding a Department to an Installation 74
Adding Attachments 272, 275-277
Adding Columns to a Form 289
Adding Computed Fields to a Form 289
Adding Fields to a Field Access Grouping 101
Adding Installations to Groups 75
Adding Scrollbars to a Form 289
Adding Tabs to a Field Access Grouping 101
Adding User Defined Reports 304
Adding Users to Groups 78, 90
Additional Costs Register 20
Address Contacts 5
Address Products 5
Address References 12
Address Register 5
Address Relation Types 10
Address Relationships 10-11
Address Type QA Grades 7
Address Types 6
Addresses Mobile Phone Numbers 263
Airport Register 58
Alert Emails 208, 217
Alert Expression 213
Alert Gauges 208, 217
Alert Groups 211
Alerts
- Define New 212
- Expression 214
- Gauges 208, 217
- Notification 215
- Notifications 208, 217
- Threshold 215
- Thresholds 208, 217

Alerts Overview 211
AMOS Action Send SMS 264
AMOS Actions 162
AMOS User Passwords 81
amosw.ini 227
Applying Transaction Codes 68
Applying Translated Text in AMOS 227
Approval Limits 89
Approval Limits Register 66
Assign a Template to a Tab 294
Assign a User Password 81
Assign Group Approval Limits 89
Assigning a Password 81
Assigning Users to Groups 90
Attachment Drag and Drop 277
Attachment References Library 47, 269
Attachment References Register 47, 269
Attachment Registers 47
Attachments File Operation 272
Attachments Maximum Size 272
Attachments Oversize Action 272

Attachments Store in Database 272
Audit Trail
Reason Code Register 185
Audit Trail Access Rights 181
Audit Trail Change Reasons 184
Audit Trail Log 189
Audit Trail Reason Codes 24, 185
Audit Trail Reports 183
Audit Trail Tabs 189-190
Auto Numbering 109
Automated Export 231
Automated Import 231

B

Balance 67
Banks Register 65
Barcodes 311
Barcodes on Labels 311
Bargain Agreements Register 65
Berth Management 25
Berth Type Register 25
Blacklisted Vendors 7
Browser Support for Remote Work Flow 171
Budget Code Access 91
Budget Codes Register 67
Bureau Veritas 183
BV Audit Trail Reports 183

C

Cargo Attribute Type Register 57
Cargo Group Register 57
Cargo Type Register 57
Category Register 58
CBM Alarm Interface 259
CBM References 258
Change a User Password 81
Change a View 199
Change Status 168
Change Templates 294
Change Work Flow Status 168
Changing Audited Fields 188
Claims 52
Class of Cost 67
Clean up the Address Register 12
Clean Up Users in the Database 84
Combined Access 98
Company Management 76
Company Register 58
Complete System Access 99
Component Classes Register 27
Composite Counters 16
Configure Predefined Fields 200
Configure Work Flow Revisions 166
Configuring a Work Flow 160
Configuring Account Transactions 176
Configuring an Audit Trail 180
Configuring Audit Trails 179
Configuring Overview Panels 221
Configuring Predefined Filters 202
Configuring Remote Work Flow 172
Confirm on Exit 195
Conflicting Predefined Fields 200
Conflicting Predefined Filters 202
Connect e-Business Vendors 248
Connect Forms and Templates 291
Connecting a Mobile Phone 263
Contacts 5
Contract Leave Days Register 58
Convert Basic Template to Enhanced 292
Convert Templates 292
Convert Work Flow Status 165
Converting a Unit 19
Copy Access Control 95
Copy Access Settings 94
Copy Translation to Excel 223
Copying Access in the Work Flow 163

Copying Access to AMOS Actions 163
Copying Group Access 94
Copying Group Access Controls 94
Cost Centre Access 92, 177
Cost Centre Register 67
Cost Centres 177
Counter Types Register 16
Countries Register 24
Creating a Field Access Grouping 101
Creating a New Department 74
Creating a New Group 88
Creating a New Installation 74
Creating a New Installation Group 75
Creating a New User 78
Creating a New View 197
Creating a Notification Task 262
Creating Access Sections on a Template 293
Crew Effect Type Register 58
Criticality Degrees 28
Currency Codes Register 17
Currency Rates Register 14
Currency Rounding Register 65
Custom Clearance Contract Expense Types 45
Custom Clearance Finalise Types 45
Customise e-Business Files 252
Customise HTML Files 252
Customising Appearance 209

D

Dashboard 205
- Image 206
- URL 206

Dashboard Check Interval 195
Dashboard Image 206-207
Dashboard Parameters 113
Dashboard User Options 205
Dashboard Webpage 206
Database Parameters 113
Deactivating Installations/Departments 74
Default Addtional Costs 20
Default Association 272
Default Mailboxes 161
Default Origin 83
Default Payment Terms 38
Default Settings 113
Default Templates 110, 294
Default View 196
Define a Job Description 25
Defining a Stock Grade 21
Defining Access to Cost Centres 177
Defining Access to Templates 293
Defining Tabbing Order on a Form 289
Defining Work Flow Actions 160
Defining Work Flow Statuses 161
Defining Work Flow Transformations 161
Delay Activity Register 57
Delay Reason Register 57
Delegate Mailbox Access 169
Deleting Duplicates in a Translation 223
Delivery Locations Register 44
Delivery Terms Register 37
Department Access 88, 94
Departments 74
Depreciation Levels Register 71
dest.cry files 224
Directories 110
Disability Grade Register 58
Disable Dashboard 206
Disabling Users 78
Disciplines Register 16
Document Templates Register 50
Drag and Drop Attachments 277
Duplicated Addresses 12

E

e-Business Access Rights 240

e-Business Custom Templates 251
e-Business Customisation 252
e-Business HTML Concepts 253
e-Business Import/Export Tasks 249
e-Business Parameters 240
e-Business Portal Driver 253
e-Business Portal Formats 243
e-Business Portal Settings 244
e-Business Sharing Parameters 240
e-Business Tamper Control 244
e-Business Users 241
e-Business Vendors 248
Edit Formula 66
Edit Wage Scale 65
Editor 117
Email Notifications 208, 217
Emergency Response System 51
Employee Address Type Register 58
Employee Details Register 58
Employees Register 12
Enable an Alert on Dashboard 207, 216
Enable Dashboard 206
Enabling Remote Work Flow 174
Enabling Users 78
Enforce Complex Passwords 83
Enforce Password History 83
Enhanced Templates 292
ERS 51
Evaluation Criteria Register 58
Evaulation Grade Register 58
Event Type Register 57
Expense Type Register 45
Expense Types 45
Export Log 238
Export Task Error Notifications 266
Export Tasks 230
Expressions 161
Extension Features 297
  Access Modules 308
  External Modules 307
  Reports Menu 304
External Discipline 16
External Modules 307
  Defining 307
External Programs 307

F

Failure Descriptors Register 33
Failure Detection Methods Register 33
Failure Effects Register 33
Failure Modes Register 32
Failure Severity Register 34
Family Relation Register 58
Field Access
  Add Fields and Tabs 102
Field Level Access Expressions 105
Field Level Access Rights 105, 363
File Extensions 120, 233
Filter Defaults on Work Flow 161
Filter Wage Types by Identification 66
Finalise Type Register 45
Financial Parameters 132
Find File Button 276
Find Out Where Attachments are Used 272
Force a Password Change 81
Form Designer Window 288
Form Identification 45-46
Form Origin 83
Framework Registers 15
Function Criticality 28
Function Criticality Indicator Register 28
Function Criticality Register 28
Future Wage Scale 65

G

Gauges 208, 217

General System Access 99

Generating Audit Trail Triggers 189

Ghostscript 300

Global Access 88, 94

Global Search 128

Grant Access at Field Level 105, 363

Graphical View 161

Group Access

- Access Modules 310

Group Access on AMOS Actions 163

Group Approval Limits 89

Group Priority 201, 204

Group Priority on Predefined Fields 199

Group Priority on Predefined Filters 202

Group Scope 196, 199, 202

Groups 88

- Set Access Rights 91

H

Hand Terminal Interface File Formats 260

Hiding the Table ID Column on a Form 289

How to Configure a Work Flow 160

How to Configure an Audit Trail 180

How to Define a Job Description 25

How to Set Up Field Level Access 101

HTML Types 171, 253

HTML/JSON 171, 254

HTML/No Script 255

HTML/XML 171, 253

I

Icon Bar 192-193

Idle Time Out 195

Import Attachments 279

Import Form to Templates Register 291

Import Images 279

Import Selection Files 235

Import Task Error Notifications 266

Import Tasks 230

In Use QA Grades 21

Initial Work Flow Locks 164

Initial Work Flow Status 164

Installation Groups 75

Installations 74

Institute Register 58

Insurance 52

Insurance Category Register 52

Interace Options

- Views 196

J

Job Class Access 91

Job Classes Register 21

Job Description Revision Control 25

Job Descriptions Register 25

Job Descriptions Used in Component Types 25

Job Triggers Register 20

JSON Library 171

L

Leave Days Register 58

Let Users Change Their Own Password 81

Linking Account Codes to Cost Centres 178

Linking Employees and Users Together 78

Linking Quality Codes and Quality Resolution Codes 18

List Bar 192-193

Listing Work Flow Actions 160

Listing Work Flow Statuses 161

Local Access 88

Locations Register 13

Lock Access 165

Lock an Address 12

Lock the Work Flow 165

Login Audit Log 190
Logon with Windows Password 85

M

Mailbox Access Log 85, 169
Mailbox Check Interval 195
Maintenance and Purchase Registers 25
Maintenance Causes Register 32
Maintenance Classes Register 31
Maintenance Criteria Register 30
Maintenance Task Reschedule Limits 30
Maintenance Types Register 30
Make a Template Obsolete 15
Manage Companies 76
Mandatory Alerts 212
Mandatory Fields 175
Manning Agents Register 58
Manual Alert Definition 213
Manual Export 232
Marital Status Register 58
Mark an External Discipline 16
Measure Point Types Register 16
Mobile Phone Notifications 263
Mobile Phones 263
Modify Strings 306
Moving Address References 12
Moving Job References 25
Moving User References 84
Multi Company Management 76

N

New Attachments 275
New Cost Centres 177
Non Conformity Category Register 50
Non Conformity Causes Register 51
Non Conformity Severity Register 51
Non Conformity Types Register 50
Not in Use QA Grades 21
Notification
  SMS 262
Notification Mobile Phone Number 263
Notification Recipients 263
Number Series 158

O

Opening a Form in the Form Designer 288
Opening an Overview Panel 221
Order Form Content Register 45
Order Form Origin Access 93
Order Form Origin Register 46
Order Priority Register 37
Overview Panels 221

P

Parameters
  Auto Numbering 109
  Dashboard 113
  Default Settings 113
  Default Templates 110
  Directories 110
  Editor 117
  File Extensions 120
  Maintenance 134
  Payroll 143
  Personnel 144
  Portals 121
  Purchase 145
  Reports 124
  Search 125
  Self Assessment 153
  Stock 153
  System Access 125
  Voyage 156
Password Age 83
Password Length 83
Password Parameters 83

Passwords 81
Allow a User to Change PW 82
Changing 81
Creating 81
Force Change 82
Payment Terms Register 38
Payroll Periods 66
Payroll Registers 65
Period Register 66
Permits to Work Register 14
Personnel Registers 58
Portal Formats 243
Portal Settings 244
Portal Tamper Control 244
Portals 121
Ports Register 25
Powersoft Reports 303
Predefined Fields 199
Group Priority 201, 204
Scope 199
Predefined Filters 202
Group Priority 201, 204
Scope 202
Predefined Reason Codes 24, 185
Price Classes Register 36
Print Barcodes 311
Printer Tasks 311
Printing a Report 298
Private Scope 196, 199, 202
Procedure Categories Register 49
Procedure Category Access 92
Product Types Register 17
Products 5
Project Categories Register 29
Providing a Change Reason on an Audited Field 188
PSR Reports 303

Q

QA Grades 7
QA Grades on Address Types 7-8
QA Grades on Stock 8
QA Grades Register 21
Quality and Safety Registers 49
Quality Codes Register 18
Quality Job Descriptions Register 49
Quality Resolution Codes Register 18
Quotation Compare Item Code Register 46

R

Rank Register 58
Rank Type Register 58
Reason Code Register 24
Reason Codes 184
Reasons on Audit Trails 188
Receipt Status Register 45
Register a Portal 244
Register a Portal for e-Business 244
Registers
Berth Type 25
Currency Rounding 65
Depreciation Levels 71
Expense Types 45
Failure Modes 32
Non Conformity Cause 51
Order Form Content 45
Procedure Categories 49
Product Types 17
Quality Job Descriptions 49
Relating Addresses 11
Remote Work Flow 170
Remote Work Flow Browser Support 171
Remote Work Flow Parameters 170
Report Work by Employee 12-13

Reports 124
Ghostscript 300
Modify Strings 306
Preview 298
Running and Printing 298
Save to PDF 300
Reports Hierarchy
Add a Report 304
Require a Password Change 81
Reschedule Limits Register 30
Resource Activity Register 34
Resource Activity Status Register 34
Restricting Address Availability 6
Results of an Audit Trail 189
Revise Job Description 25
Revising a Work Flow 166
Running a Report 298

S

Sailing Period Register 58
Saving a Form in the Form Designer 288
Saving a Report to PDF 300
Scope
Conflicts 200, 202
Predefined Fields 199
Predefined Filters 202
Views 196
Scope on a View 196
Scope on Predefined Fields 199
Scope on Predefined Filters 202
Search 125
Select View 199
Send SMS via Work Flow 264-265
Set e-Business Access Rights 240
Set e-Business Parameters 240
Set e-Business Sharing 240
Set Labels for User Defined Fields 158
Setting Group Access Rights 91
Setting Group Approval Limits 89
Setting up e-Business Users 241
Ship Category Register 58
Ship Store Type Register 58
Show a Webpage on the Dashboard 206
Show an Image on the Dashboard 206
Sickness Nature Register 58
Sickness Register 58
Sickness Type Register 58
Slopchest Department and Locations Register 58
Slopchest Stock Class Register 58
SMS Notification 262-263
SMS Notification Phone Numbers 263
SMS Notification Tasks 262
SMS Work Flow 265
Sort Order on Work Flow 161
Souce Files 223
Souce Unit 19
source.cry files 223
sourcep.cry files 223, 227
Spell Checking a Translation 223
srcupdt.cry files 223, 228
Standard Document Register 58
Standard Document Type Register 58
Stock Class Access 93
Stock Classes Register 35
Stock Grade Categories Register 70
Stock Grade Indicators 21
Stock Grade Print Description 21
Stock Grades Register 21
Store Attachments in the Database 47, 269
Store in DB 47, 269
Switch Departments 75
System Access 125
System Parameters
WorkFlow 122
System Scope 196, 199, 202

T

Tab and Field Access 101
Tab Appearance 192
Tamper Control 244
Task Bar 192
  Position 210
Task Server 231
Task Server Notifications 262, 266
Tasks 230
  Printer 311
Templates
  Default 294
Templates Register 15
Termination Reason Register 58
Text Location 225, 227
Themes 209
Threshold 215
Toolbar Position 192
Toolbar Text 192, 195
Toolbar Tips 192, 195
Tools Menu Registers 66
Tooltips 195
Tracking Account Transactions 178
Trade Register 58
Trade Union Register 58
Transaction Code Parameters 68
Transaction Code Values 68
Transaction Codes Register 68
Transfer Directory 233
Transfer Mailbox Contents 169
Transfer Reasons Register 36
Translating Text with Locations 227
Translation 223
  cry and dest source files 223
  Special Characters 228
  Spell Checker 226
  srcupdt.cry files 228
  Update 228
  Validation 228
Translation in the ini file 227

U

Unacceptable QA Grades 7
Unit Conversion Expression 19
Units Register 19
Unlock an Address 12
Unlock the Work Flow 165
Updating a View 198
Use Order Priority on Deliveries 37
Use Revisions 166
User Defined Fields 158
User Defined Reports 304
User Groups 88
User Mailbox Access 85
Users 78
  Default Origin 83

V

Validation and Special Characters 228
Vendor Payment Terms 38
Vessel Characteristic Type Register 58
Vessel Department Register 58
Vessel Details Register 15
Vessel Register 58
Vessel Types Register 20
Viewing an Audit Trail 189
Views 196
  Default 196
  Scope 196
  Select 199
Voucher Category Register 45
Voyage Management Registers 57

W

Wage Formula 66
Wage Type Identification 66

Wage Type Register 66
Warning on Filter without Given Criteria 195
What is a Reschedule Limit 30
Windowing Mode 195
Windows Credentials 85
Work Flow Access to Action 162
Work Flow Actions 160, 162
Work Flow Cancel Action 161
Work Flow Configuration 160-161, 166
Work Flow Configuration Revisions 166
Work Flow Lock Types 165
Work Flow Notifications 169
Work Flow Revisions 166
Work Flow SMS 264
Work Flow Statuses 161
Work Flow Transformations 161
WorkFlow Parameters 122
World Regions Register 24