

# S08 — Archive (Reports & Records) — Screen Spec (MVP)

Nav label: \*\*Archive\*\*

Page title: \*\*Reports & Records\*\*

Status: Draft (MVP scope locked)

P26-02-20

Depends on: S01 Defects, S02 Tasks & Work Orders, S03 WOT Reports, S04 Inventory & Requisitions, S05 PM Matrix, S06 Daily Log, S07 DOS, E&M; (Equipment & Machinery), Projects (Jobs) screen (planned)

Feeds: DOS aggregates + dashboards, export packs, compliance evidence, audits

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## 1) Purpose

Archive (Reports & Records) is the system's **long-term record vault** and the place where users:

- Search and retrieve submitted/closed records (WOT reports, checklists, closed WOs, defect history, purchasing history).
- Produce management-ready exports (weekly/monthly packs, handover packs).
- View financial rollups (Accounting) and cost allocations (Projects/Jobs).
- Maintain an accountable audit trail via Activities Log.

Engineer-first intent:

- Fast search + filters first.
- “Recently Submitted” remains a convenience view on WOT Reports; **Archive is the full archive.**
- Submissions are immutable by default (edits require elevated permission + audit log).

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## 2) Inputs (what the user does here)

Archive is mostly read-only, but supports:

- Search, filter, sort, tag, and export.
- Generate report packs (exports) from selected date ranges and sections.
- Add notes to records (optional, if allowed) without altering original submitted content.
- Admin actions (permissioned):

- Corrective edit (rare) with mandatory reason
- Reclassify/link record to correct equipment/project
- Manage vendor list references (optional)

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### 3) Outputs (what it creates/updates elsewhere)

- Generates **Export Packs** and stores them in Archive → Exports & Packs.
- Updates/maintains **cached aggregates** used by DOS (daily/weekly/monthly rollups) for speed.
- Records all overrides, mutes, and corrective edits into **Activities Log**.

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### 4) Tabs / sections / subviews (layout)

#### A) Top-level tabs (MVP)

- 1) Search (Global)
- 2) WOT Reports
- 3) Routine Checklists
- 4) Work Orders & Tasks
- 5) Defects
- 6) PM Compliance
- 7) Inventory & Purchases
- 8) Subscriptions
- 9) Accounting
- 10) Project Cost Projections
- 11) Activities Log
- 12) Exports & Packs

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### 5) Tab definitions (what each contains)

#### 5.1 Search (Global)

- Unified search bar with advanced filters:

- Date range, category, equipment, project/job, vendor, user, status, priority
- Results grouped by record type (WOT, checklist, WO, defect, purchase, etc.)
- “Open record” deep link to read-only viewer or source view.

## **5.2 WOT Reports (full archive)**

- All submitted WOT reports, including unresolved chains
- Filters: date, system, equipment, WO type, priority, resolver, vendor/contractor
- Displays: labor time, parts used, costs, attachments
- Links: WO, defect(s), purchases

## **5.3 Routine Checklists**

- Stored submissions from Daily Log: daily/weekly/biweekly/monthly/6m/12m/24m
- Missed submissions and override reasons
- Export-ready.

## **5.4 Work Orders & Tasks (history)**

- Closed/cancelled/reopened records
- Basic time-to-close metrics
- Links to WOT report(s) and purchase items.

## **5.5 Defects (history)**

- Closed defects, de-escalations, reopen chains
- Links to WO request and final WOT report.

## **5.6 PM Compliance**

- Completed PM instances by interval/equipment
- Skips/deferrals with reasons (audit)
- Compliance rollups (MVP: monthly)
- Links: PM Matrix row + WO/Task.

## **5.7 Inventory & Purchases**

- Requisitions lifecycle: created → approved → ordered → received
- Delivery timelines + attachments (quotes/invoices/receipts if captured)
- Consumption events (incl. fast consume)
- Allocation links: WO/Task, Defect, Project/Job, Equipment

## 5.8 Subscriptions

- Subscription register: service, renewal dates, cost, owner (optional)
- Notifications history (renewal due/overdue)
- Links to originating entry in Inventory & Requisitions.

## 5.9 Accounting (rollups)

- Daily/weekly/month-to-date totals
- Category totals, vendor totals
- Project totals (linked purchases + linked WO labor/parts)
- Export tables (phase 2), saved in Exports & Packs.

## 5.10 Project Cost Projections

- Budget vs actual vs forecast per Project/Job
- Source of truth: Projects/Jobs screen (planned)
- Actuals: linked purchases + linked WO/WOT totals
- Forecast remaining (MVP): budget - actual (optional manual adjustment later)

## 5.11 Activities Log (audit trail)

- Timestamp, user, action type, object type, object ID, summary diff
- Mandatory reason for overrides/mutes/skips/corrective edits
- Filters: date, user, object, action, overrides-only, "my actions".

## Sea Service Records

Derived logbook-style records generated only from **submitted Daily Logs**:

- Daily record: date + status (underway/anchor/dock/shipyard) + who submitted + submission timestamp
- Rollups: MTD/YTD totals by status
- Export: "Sea Service Summary" pack (phase 2) stored in Exports & Packs
- Audit: corrections/re-submissions write an Activities Log entry

## 5.12 Exports & Packs

- Stored pack definitions and generated bundles
- Weekly performance pack / monthly management pack / engineer handover pack
- Stores: date range, sections included, who generated, files (phase 2)

- DOS can show “recent packs” but storage lives here.

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## **6) Rules & behaviors (automations + triggers)**

### **A) Immutability and audit**

- Submitted records immutable by default.
- Corrections require admin permission + reason + Activities Log entry.

### **B) Aggregates for DOS (performance + speed)**

- Archive maintains cached rollups used by DOS:
  - daily/weekly/monthly fuel usage, hours, spend, compliance, completions
- Rollups update on events:
  - Daily Log submitted
  - WOT report submitted
  - Requisition received/posted
  - PM instance closed
  - Optional nightly recompute

### **C) Export generation**

- Export packs generated from date range + selected sections
- Every export saved as a Pack record.

### **D) Data integrity and linking**

- Records can link to: Equipment (E&M;), WO/Task, Defect, Vendor, Project/Job
- Re-linking allowed only with audit trail.

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## **MVP notes**

- MVP focus: search/filters, read-only viewers, Activities Log, Accounting rollups, Packs (records).
- Full file bundle export can be phase 2; MVP can store pack definition + basic tables.

## **Certificates & Documents (File Vault)**

Long-term storage for PDFs, scanned copies, and documents used as compliance evidence.

- Fields (MVP):
  - Document name
  - Category (Class/Flag/Safety/Fire/Radio/Environmental/Medical/Other)
  - Expiry date (optional but recommended)
  - Linked Compliance item (optional link to PM → Compliance)
  - Linked vendor (optional)
  - Tags + notes
- Behaviors:
  - Expiry reminders feed DOS counters and notifications
  - Documents are immutable by default; edits require permission + Activities Log entry
- **Compliance Records:** completed compliance items saved here with sign-off and evidence links.