

# Keppel Steria Consortium (KSC)

## LAND TRANSPORT AUTHORITY



## MAINTENANCE MANAGEMENT SYSTEM

### OPERATION MANUAL COSWIN STANDARD & CONFIGURATION VOLUME 3 OF 11

Ref.: 756/PMP/8029c/-

KSC Version: 2.0

Date: 3 June 2002

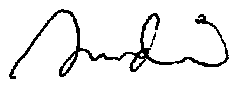
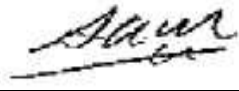

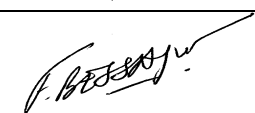
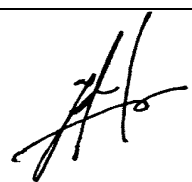
Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: A Date: 3 June 2002

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Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: B Date: 3 June 2002

## PROCESSED BY

	Date:	Initials:
<b>Written by:</b> Chung Sudin Software Engineer	3 June 2002	
<b>Reviewed by:</b> Sam Chuah Deputy Technical Manager	3 June 2002	
<b>Reviewed by:</b> Edwin Dijong Quality Manager	3 June 2002	
<b>Approved by:</b> Francois Bessaguet Deputy Project Manager	3 June 2002	
<b>Approved by:</b> Ho Yaw Meng Project Manager	3 June 2002	

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: i Date: 3 June 2002

# TABLE OF CONTENTS

<b>1. INTRODUCTION.....</b>	<b>1</b>
<b>2. COSWIN STANDARD.....</b>	<b>2</b>
2.1 LOGIN .....	2
2.1.1 Login to COSWIN Application Menu.....	2
2.1.2 Login to COSWIN Configuration Menu.....	3
2.2 STANDARD COSWIN WINDOW CONTENTS .....	3
2.2.1 COSWIN Top label .....	3
2.2.2 The Window Layout .....	4
2.2.3 COSWIN Main Tool Bar.....	5
2.2.4 Standard Buttons.....	7
2.2.5 Non Standard Buttons.....	9
2.2.6 Other Buttons.....	9
2.2.7 Format Tools Bar.....	10
2.3 AVAILABLE ACTIONS ON A FIELD.....	10
2.3.1 Selector Button.....	10
2.3.2 Direct Link.....	12
2.3.3 Dynamic Help Window .....	12
2.4 FILTER IN SELECTORS AND LISTS .....	13
2.4.1 Use of Wild Card Characters .....	14
2.4.2 Available Filter Functions .....	15
2.4.3 Set Filter at Field Column of Selector .....	16
2.5 OTHER FUNCTIONS AVAILABLE AT THE SELECTOR WINDOW .....	16
2.6 ADD INSIDE A LIST .....	18
2.7 ACTION AVAILABLE ON A TEXT FIELD .....	19
2.8 USEFUL MENU FUNCTIONS .....	20
2.8.1 Shortcut Key.....	21
2.8.2 Date fields.....	21
2.8.3 Copy/Paste.....	21
2.9 PREFERENCES .....	22
<b>3. COSWIN SECURITY CONFIGURATION.....</b>	<b>26</b>
3.1 INTRODUCTION.....	26
3.2 DEFINE GROUPS .....	27
3.2.1 Adding a New Group .....	28
3.2.2 Modifying an Existing Group.....	29
3.2.3 Copying from an Existing Group.....	29
3.2.4 Deleting an Existing Group .....	30
3.2.5 Attaching a Screen Configuration.....	30
3.2.6 Assigning Access Right .....	31
3.2.7 Attaching Reports to a Coswin Module for a Group of Users .....	32
3.2.8 Printing the Assigned Access Rights of a Group of Users .....	34
3.2.9 Assigning Data Access Rights for a Group of Users .....	34
3.3 DEFINE USERS .....	38
3.3.1 Adding a New User .....	39
3.3.2 Modifying an Existing User .....	40
3.3.3 Deleting an Existing User.....	40
3.3.4 Attaching a Screen Configuration and Reports, Assigning Access Rights and Data Access .....	40
3.4 CHANGE PASSWORD.....	41
<b>4. COSWIN APPLICATION CONFIGURATION .....</b>	<b>42</b>
4.1 GLOBAL PARAMETERS .....	42
4.1.1 Defining GENERAL PARAMETERS .....	43
4.1.2 Defining ACCOUNTING PERIODS.....	44
4.1.3 Defining SPECIFICATION ATTRIBUTES .....	45
4.1.4 Defining PSION PARAMETERS.....	46

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: ii Date: 3 June 2002

4.1.5	Defining <i>INSTALLATION ADDRESS</i> .....	47
4.2	MAINTENANCE PARAMETERS .....	47
4.2.1	Defining <i>PLANT CALENDAR</i> .....	48
4.2.2	Defining <i>BAR CODES</i> .....	53
4.2.3	Defining <i>DEFAULT CODES</i> .....	55
4.2.4	Defining <i>RATE HEADINGS</i> .....	57
4.2.5	Defining <i>JOB BEHAVIOUR</i> .....	58
4.2.6	Defining <i>JOB PRIORITIES</i> .....	58
4.2.7	Defining <i>JOB TYPE</i> .....	59
4.2.8	Defining <i>JOB CLASS</i> .....	60
4.2.9	Defining <i>JOB IDENTIFIERS</i> .....	61
4.2.10	Defining <i>WORK ORDER TYPE</i> .....	62
4.2.11	Defining <i>WORK ORDER STATUS</i> .....	63
4.2.12	Defining <i>WORK ORDER PRINT OPTIONS</i> .....	64
4.2.13	Defining <i>WORK ORDER PARAMETERS</i> .....	66
4.2.14	Defining <i>DEPRECIATION</i> .....	67
4.2.15	Defining <i>CALENDAR CONTROL</i> .....	68
4.2.16	Defining <i>ANALYSES CONTROL</i> .....	70
4.2.17	Defining <i>JOB REQUEST</i> .....	71
4.2.18	Defining <i>ACTIONS</i> .....	72
4.2.19	Defining <i>HAZARD MONITORING</i> .....	72
4.2.20	Defining <i>WORK PERMIT GENERAL PARAMETER</i> .....	73
4.2.21	Defining <i>WORK PERMIT CODE GENERATION</i> .....	73
4.2.22	Defining <i>ROSTER</i> .....	74
4.3	STORE PARAMETERS .....	74
4.3.1	Defining <i>GENERAL PARAMETERS</i> .....	75
4.3.2	Defining <i>COMPANY</i> .....	77
4.3.3	Defining <i>ITEM PARAMETERS</i> .....	78
4.3.4	Defining <i>ITEMS VAT</i> .....	80
4.3.5	Defining <i>STOCK DEMANDS</i> .....	80
4.3.6	Defining <i>STOCK ISSUES</i> .....	81
4.3.7	Defining <i>STOCK RECEIPTS</i> .....	82
4.3.8	Defining <i>STOCK TRANSFERS</i> .....	84
4.3.9	Defining <i>STOCK COUNTS</i> .....	84
4.4	PURCHASE PARAMETERS .....	85
4.4.1	Defining <i>SUPPLIERS</i> .....	85
4.4.2	Defining <i>PURCHASE REQUESTS</i> .....	86
4.4.3	Defining <i>QUOTATIONS</i> .....	89
4.4.4	Defining <i>PURCHASE ORDERS</i> .....	90
4.4.5	Defining <i>INVOICES</i> .....	92
4.4.6	Defining <i>INVOICE RECONCILIATIONS</i> .....	93
4.4.7	Defining <i>CREDIT NOTES</i> .....	94
4.4.8	Defining <i>SUPPLIER PERFORMANCE</i> .....	95
4.4.9	Defining <i>PACKAGES</i> .....	96
4.5	WORKFLOW PARAMETERS .....	96
4.5.1	Defining <i>WORKFLOW CODE GENERATION</i> .....	97
<b>5.</b>	<b>VALIDATION CIRCUIT AND WORKFLOW</b> .....	<b>98</b>
5.1	VALIDATION CIRCUITS CONFIGURATION (VCCF) .....	98
5.1.1	<i>Purpose</i> .....	98
5.2	VALIDATION CIRCUITS DEFINITION (VCDF) .....	98
5.2.1	<i>Purpose</i> .....	98
5.2.2	<i>To ADD validation Circuits</i> .....	102
5.2.3	<i>To MODIFY an existing validation circuit</i> .....	103
5.2.4	<i>To DELETE an existing Validation Circuit</i> .....	103
5.3	TRANSACTIONS MONITOR (VCTM) .....	104
5.3.1	<i>Purpose</i> .....	104
<b>6.</b>	<b>AUDIT TRAIL</b> .....	<b>109</b>

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: iii Date: 3 June 2002

6.1	GENERAL OVERVIEW .....	109
6.1.1	Activation Of Audit Trail .....	109
6.1.2	List of Modules.....	110
6.1.3	USER INTERFACE.....	110
6.1.4	ExAmple .....	110
6.1.5	Audit Trail Access From COSWIN .....	111
<b>7.</b>	<b>CYCLICAL PRINTING .....</b>	<b>113</b>
7.1	LANCEPRG.....	113
7.1.1	Parameterisation .....	113
7.2	RUNREP .....	114
7.2.1	REPEDT32.INI .....	115
7.3	CMD FILES .....	115
7.4	REPSTAR COMMAND LINE .....	115
7.4.1	General Syntax.....	115
7.4.2	Some Examples .....	116
7.5	ERROR FILE .....	117
<b>8.</b>	<b>LIMITATION ON CREATION OF WORK ORDER .....</b>	<b>118</b>
<b>9.</b>	<b>LIMITATION ON CREATION OF PO .....</b>	<b>119</b>
<b>10.</b>	<b>SWITCH OVER MESSAGE PROMPT.....</b>	<b>120</b>
10.1	SERVER SWITCH OVER MESSAGE .....	120
10.2	LINK FAILURE MESSAGE .....	120
<b>11.</b>	<b>CHECK LOGIN FEATURE .....</b>	<b>121</b>
<b>12.</b>	<b>PAGING .....</b>	<b>122</b>
12.1	CONFIGURATION OF PAGING .....	122
12.2	VERIFICATION OF PAGING.....	123
<b>13.</b>	<b>AUTO FAX .....</b>	<b>127</b>
<b>14.</b>	<b>END OF DOCUMENT .....</b>	<b>129</b>

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 1 Date: 3 June 2002

## 1. INTRODUCTION

The Operation Manual shall describe in details all the functionalities of the Maintenance Management System (MMS).

COSWIN is a maintenance management tool specialised in assisting the monitoring and tracking maintenance works. It provides a set of comprehensive and configurable options for users to customise the software to meet their operational needs.

This document is the COSWIN Standard and Configuration volume of the MMS Operation Manual.

Chapter 1 provides a general introduction to COSWIN.

Chapter 2 explains COSWIN standard window layouts and toolbars.

Chapter 3 describes COSWIN Security Configuration that defines the access right of the each COSWIN user.

Chapter 4 describes COSWIN Application Configuration that determines the behaviour of the software package.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 2 Date: 3 June 2002

## 2. COSWIN STANDARD

### 2.1 LOGIN


Within the COSWIN package, there is an Application section and a Configuration section.

The Application section provides the management on maintenance, stock control, purchasing procurement.

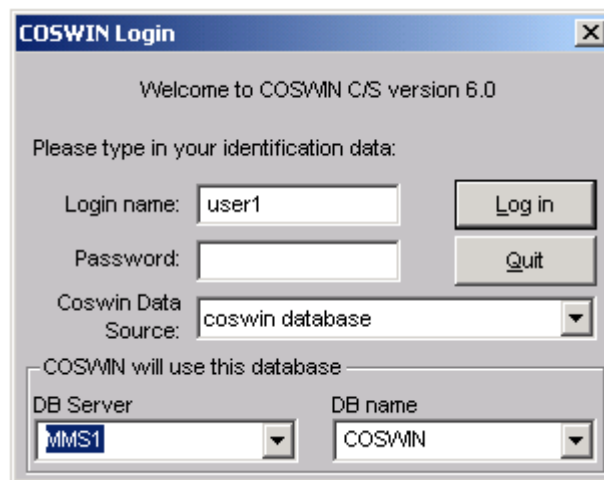
The Configuration section provides the various options in configuring the behaviour of the modules in Application section.

#### 2.1.1 Login to COSWIN Application Menu

Before any user starts using COSWIN, they will be required to login to the application. If

there is a shortcut created on the desktop (which looks like this ) , double click on it to open the COSWIN application. If not, select from the window start menu **Start → Programs → COSWIN → Coswin CS 5.0** to open the COSWIN application.

Once the application is invoked the following login screen will be prompted:




The user will have to key in his/her respective user id and password and Click the **Log in** button.

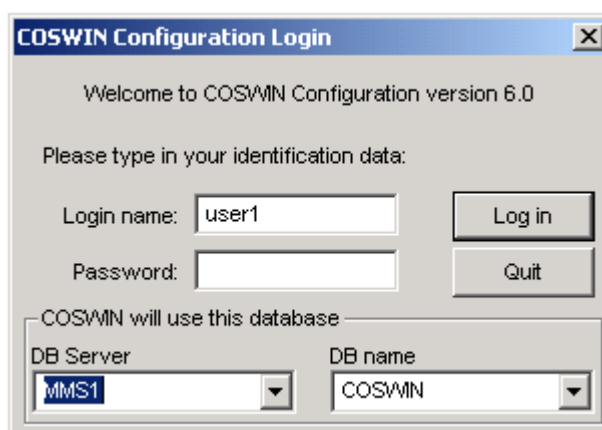


Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 3 Date: 3 June 2002

## 2.1.2 Login to COSWIN Configuration Menu

To login into COSWIN Configuration menu, either click onto the shortcut already created on the desktop (which looks like this ) , or select it from the window start menu **Start → Programs → COSWIN → Coswin CS 5.0 Configuration**.

Once the application is invoked the following login screen will be prompted:



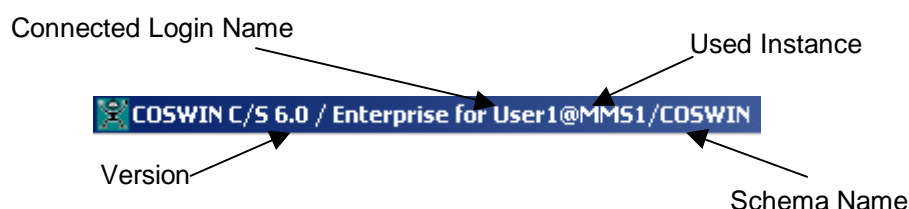
The image shows a Windows-style dialog box titled "COSWIN Configuration Login". It contains the following elements:

- A welcome message: "Welcome to COSWIN Configuration version 6.0".
- A prompt: "Please type in your identification data:".
- Two input fields: "Login name:" with the text "user1" and "Password:" (empty).
- Two buttons: "Log in" and "Quit".
- A section titled "COSWIN will use this database" containing two dropdown menus: "DB Server" (set to "MMS1") and "DB name" (set to "COSWIN").

## 2.2 STANDARD COSWIN WINDOW CONTENTS

### 2.2.1 COSWIN Top label

The label appears at the top of the COSWIN screen indicates the version of the COSWIN software used, the ID of the login user and the database instance being accessed.



## 2.2.2 The Window Layout

System option

Window Title

Window Resizing

Topographical Details

Equipment : CNV-001

Description : Main Conveyor System

Zone : A

Cost : 002

Geo Parent : B1FLOOR0

FLOOR NUMBER 0

Details Movements Remarks Serial No Technical Serves Served By

Bar Code : CNV-001

User Ref :

Incharge Ref :

Eqp Loc. :

Phone :

Type :

Item :

System : 1PL1

Priority : 5

Hst : ☒ As on : 15/11/1998

Tabs

Static field: field label

Active field of the database

**Remark:** In COSWIN, tabs are associated to the main window. They give access to specific functions of the current window.

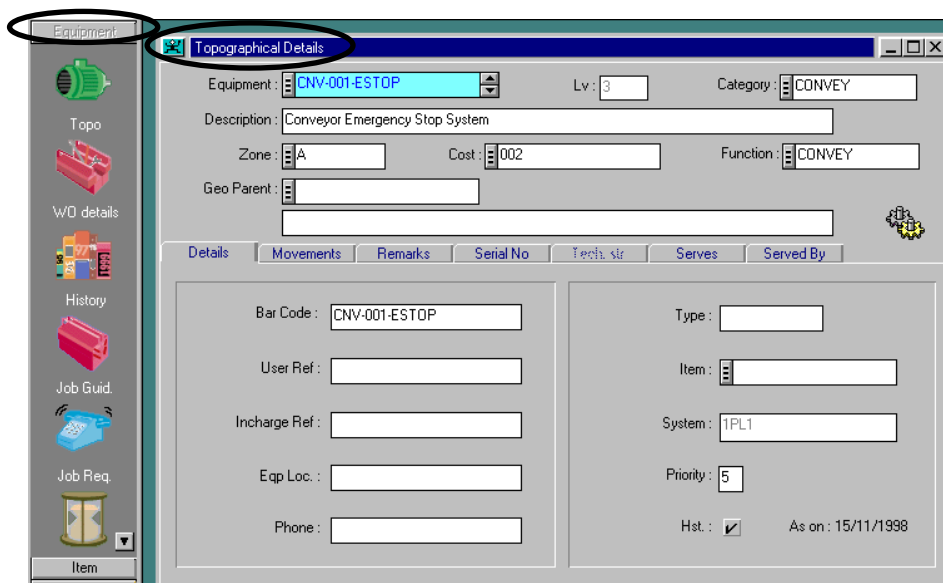
## 2.2.3 COSWIN Main Tool Bar

The COSWIN Main Tool Bar resides along the left side of the COSWIN screen.

This toolbar is divided in 4 parts. Three of them cannot be changed. These correspond to the Maintenance, Stock and Purchase modules and are automatically displayed when the current window displays the main module field (Equipment, Item or Supplier). The position of the icon within the three toolbars can be changed using the drag and drop feature of the mouse.

Click on the menu option Window / Toolbar option / Modules to activates this toolbar.

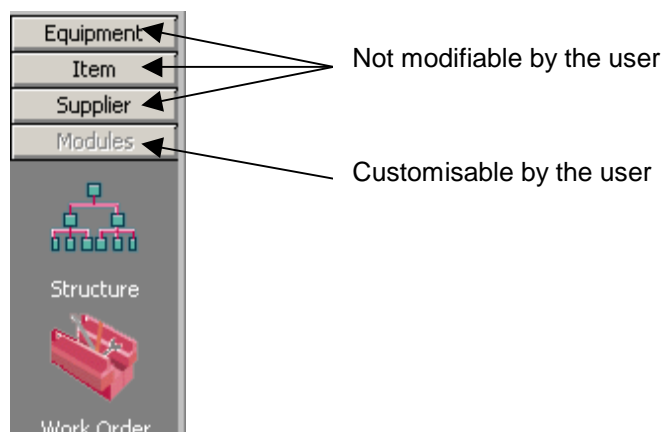
Example: Equipment toolbar is automatically displayed when opening the Topographical Details window.



The function of these toolbars is identical to those in COSWIN horizontal menu. The system takes into account the current record being viewed and opens the newly selected module with the associated record.

### 2.2.3.1 To Customise COSWIN Main Tool Bar

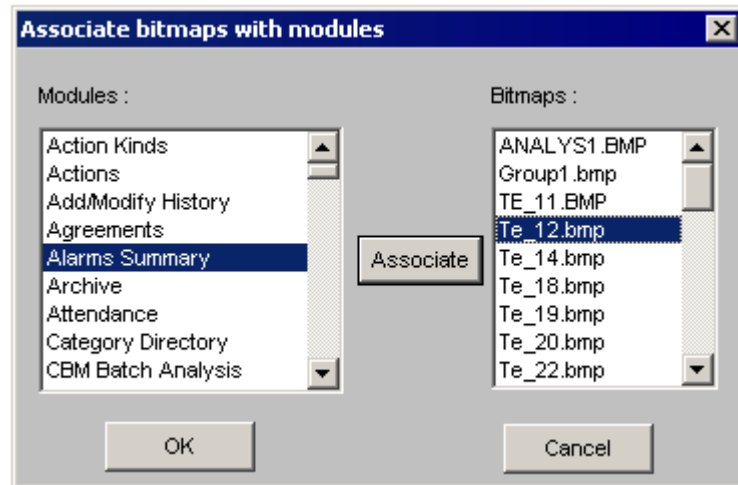
Only the "Modules" section of the Main Tool Bar is user customisable and corresponds to the COSWIN toolbar.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 6 Date: 3 June 2002

**To add a new program to the “Modules” section of the toolbar:**

1. Associate the program to a bitmap using the option under COSWIN menu Window / Toolbar Option / Associate Bitmaps



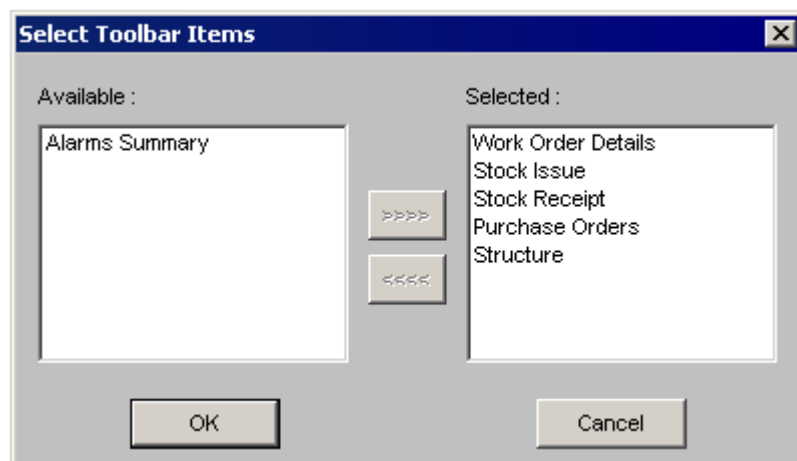
All the COSWIN modules are displayed in the Modules list box at the left column.

All the BITMAPS (\*.BMP files stored in the directory \COSWIN\BMP) not already linked are displayed in the Bitmaps column at the right column.

Select a program from the Modules list box and a bitmap from the Bitmaps list box, and the ASSOCIATE button will be enabled. Click on the ASSOCIATE button to link the program with the bitmap.

When a module is associated to a bitmap, the "Associate" button switches to "Del Assoc.". To unlink the both, click "Del Assoc." and the Bitmap is displayed again.

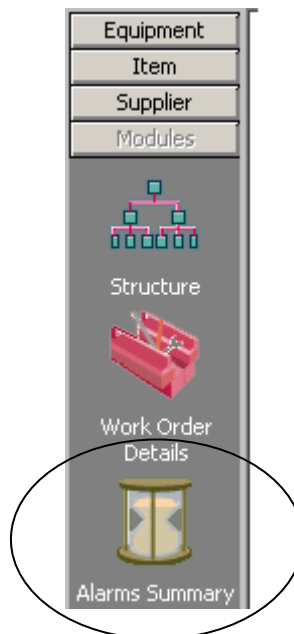
2. Select the program to the Modules toolbar using the option under COSWIN menu Window / Toolbar option / Select modules for toolbar



Click on the "Alarms Summary" in the column "available" and click the button ">>>>" to move "Alarms Summary" to the column "Selected".

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 7 Date: 3 June 2002

The resulting "Modules" toolbar will now include the newly added program:



## 2.2.4 Standard Buttons

Standard buttons are icons in the toolbar located at the top of the main screen. Checking the option "Standard Buttons" in the menu "Window" - "Toolbar Option" activates this toolbar

These buttons correspond to the standard functions like Add, Save, etc which are found in all COSWIN screens.



**Select:** Select the highlighted record in a selector



**Add:** Add a new record



**Save:** (this button is activated in "Add" and "Modify" mode) Save the record and keep the activated window open.



**Close:** Close the activated window.



**Delete:** Delete the current record



**View:** View the existing records in the database

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 8 Date: 3 June 2002



**Repetitive Input:** If selected, keeps the information of the current record on the screen. It is useful when entering in a new record with identical data as current record. To activate it:

1. Select a record to copy from
2. Select the repetitive input check box (must appeared sunken)
3. Click the ADD icon to start the "Repetitive Input"

By default, it is active in Topographical and Stock Item Details.

### 2.2.4.1 Modification of Existing Records

All the COSWIN programs are loaded in "VIEW" mode and with the first record in database displayed.

The current active mode is shown in the status bar located in the bottom right corner of the screen:

VIEW 13-08-2001

To modify a record, you have to view it and then make the required modifications directly onto the related field.

When you change the content of a field (if the modification is authorised), COSWIN switches automatically into "Modify" mode. The mode is shown in the status bar at the right bottom corner of the screen.

MOD 13-08-2001

In the case where the modified field corresponds to a search field, COSWIN wait for the tabulation to switch in "Modify" mode. If the user wishes to search the corresponding selector list to the input data, he will have to use the Up/Down arrows or Home/End keys to scroll the list.

#### EXAMPLE:

*To modify the equipment code of a corrective the work order.*

Display the Work Order.

Select or input the new equipment code.

It is mandatory to use the "Tab" key (switch in modify mode) and save the WO.

*To display the Work Orders of an equipment code.*

Display a WO.

Select or input the equipment code.

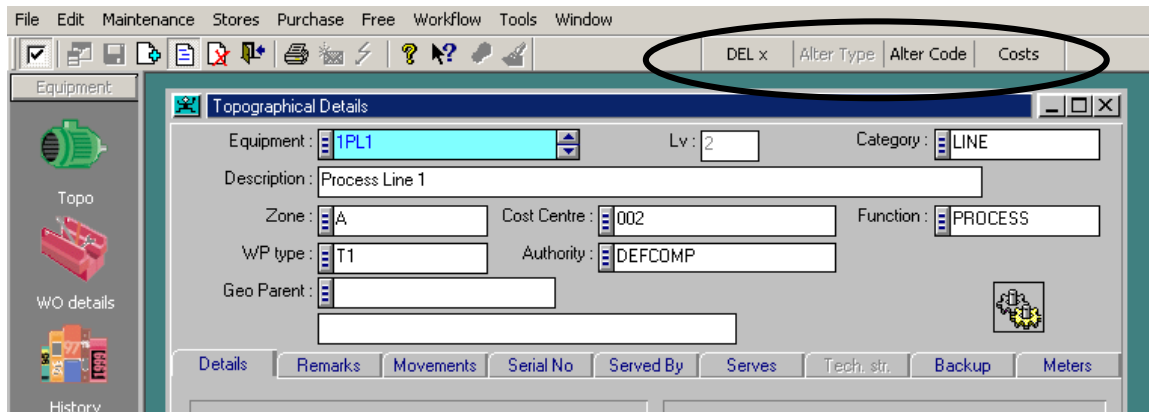
Use the moving arrows Up/Down (Keyboard or window) or Home/End keys.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 9 Date: 3 June 2002

## 2.2.5 Non Standard Buttons

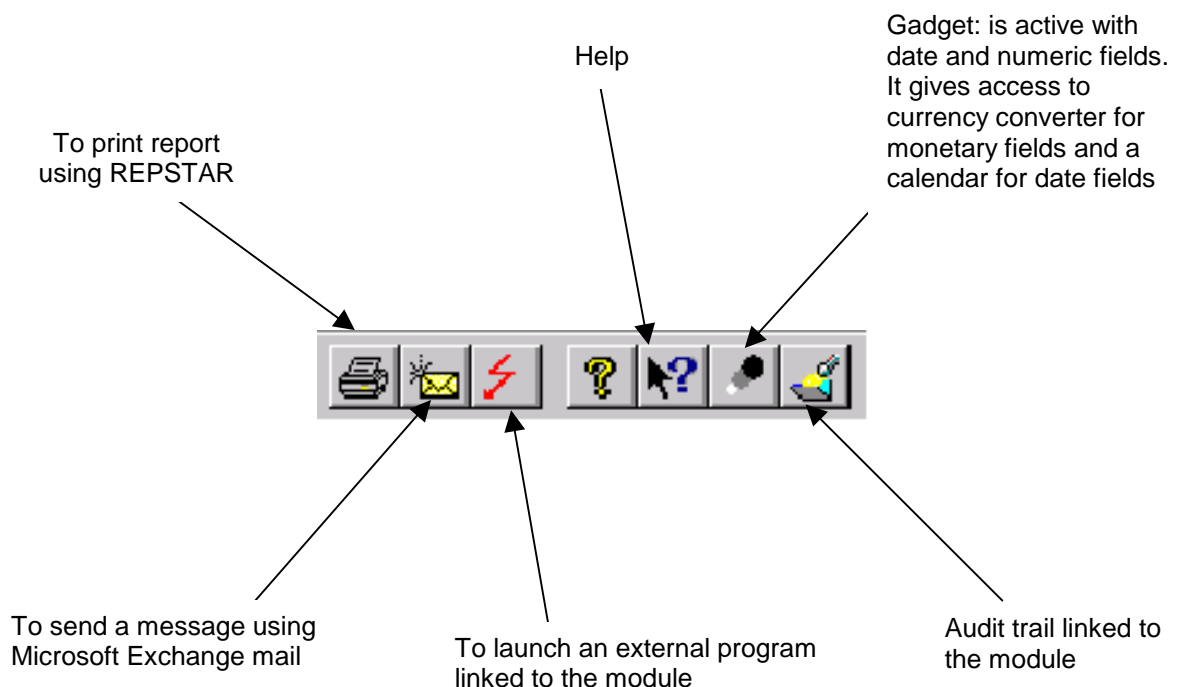
The "Non-standard toolbar" contains button for specific function. The buttons of this toolbar will change according to COSWIN current windows.

Example: Topographical Details window



Select the option "Non standard button" from menu option Window / Toolbar options will activates the "Non standard toolbar".

## 2.2.6 Other Buttons

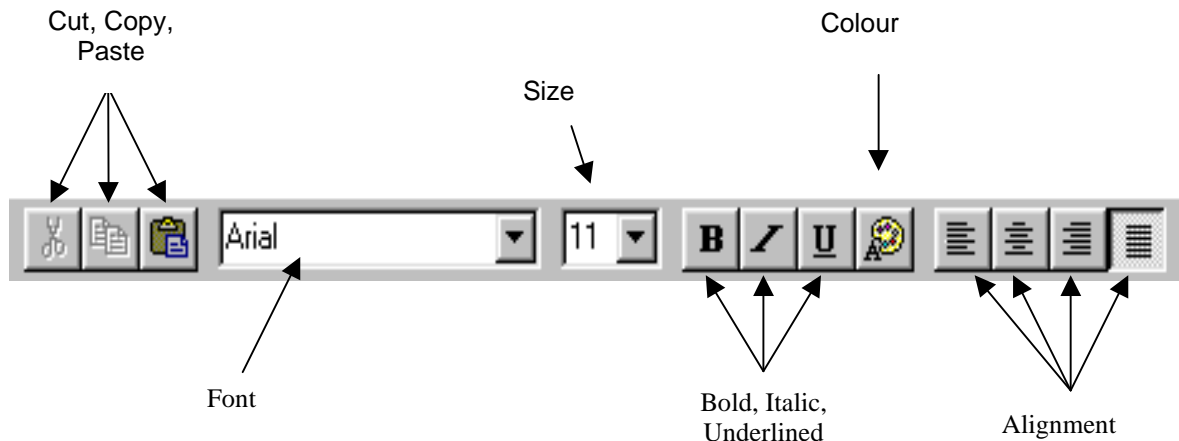


Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 10 Date: 3 June 2002

## 2.2.7 Format Tools Bar

This toolbar gives access to the functions Cut, Copy, Paste, Font, Size, etc...

It can be displayed by ticking "Formatting" in the "Window" - "Toolbar Options". This toolbar looks like below:



The "Format" function of this toolbar is available for all OLE fields in COSWIN in Modify mode. The Cut, Copy and Paste functions are available for all the fields.

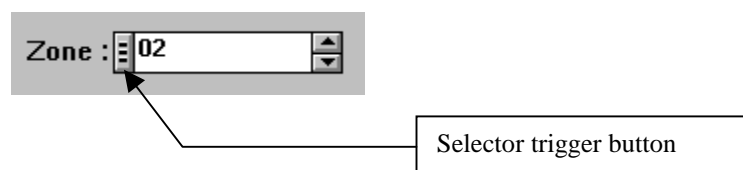
**REMARK:** All the toolbars (except the main one) can be moved around COSWIN C/S 5 screen area.

## 2.3 AVAILABLE ACTIONS ON A FIELD

### 2.3.1 Selector Button

For all the fields corresponding to a reference directory (Zone, Function, Equipment....) a selector (Data list) is available.

The user calls this selector with a specific button of the field (see below) or by pressing the **F2** key.



By default, the called selector displayed all the records of the file, sorted in alphanumeric order.

To move within the selector with the keyboard:

Using the arrows: ↑↓ moves line by line.

The "Page Up" or "Page Down" keys to move by page.

The "End" key goes to the end of the list.

The "Home" key goes to the beginning of the list.

The letters keys go to the records that begin by the corresponding letter.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 11 Date: 3 June 2002

To move within the selector with the mouse:

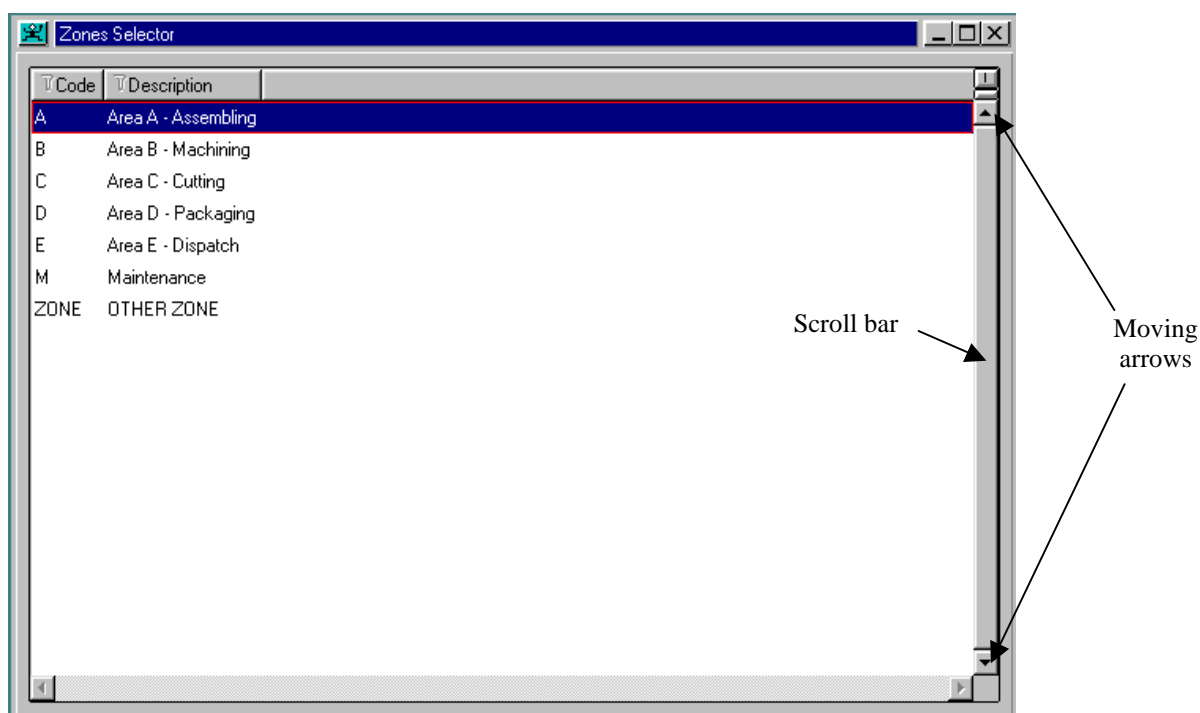
Line by line using the arrows of moving of the "Scroll bar".

Page by page using the top or bottom part of the "Scroll bar".

In all the selectors, the standard functions of the program are available (according the user access right): Add, Modify, and Delete.

Inside the list, it's possible to move with the "Scroll bar". You just have to click on it, To keep the button pushed down and to move the mouse, as you need.

When you open the selector again, it comes back in the same position than during the previous opening. In fact the position is memorised until the module closure.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 12 Date: 3 June 2002

## 2.3.2 Direct Link

When a file is linked to a reference table, a direct link with the corresponding data is available. It is possible to view the details related to the value of the field.

These links are activated with the right button of the mouse or with the **F7** key.

A dynamic help window (see next section) indicates the availability of the direct link.

EXAMPLE: Branching to the WO Details from the Stock Issue Details.

Type : Normal Issue

WO ID : 12

Cost : Z\_CCHARGE

Remarks :

Right button of mouse or key F7

==> The Work Order Details window will be displayed with details of WO number 12:

Work Order Details

WO ID: 12 Stat: 0 Not started Sch.Date: 02-08-2001

Equip: 1PL1 Process Line 1

Job: JOB000004 Pump Repair

Eqp. Catg.

## 2.3.3 Dynamic Help Window

When the cursor is on a field, after 2 or 3 seconds, a dynamic help window (in yellow) that shows all the possible actions on the field (selector, direct link...), will be automatically displayed.

Function : 101

F2 Select from list  
F7 Link to module

## 2.4 FILTER IN SELECTORS AND LISTS

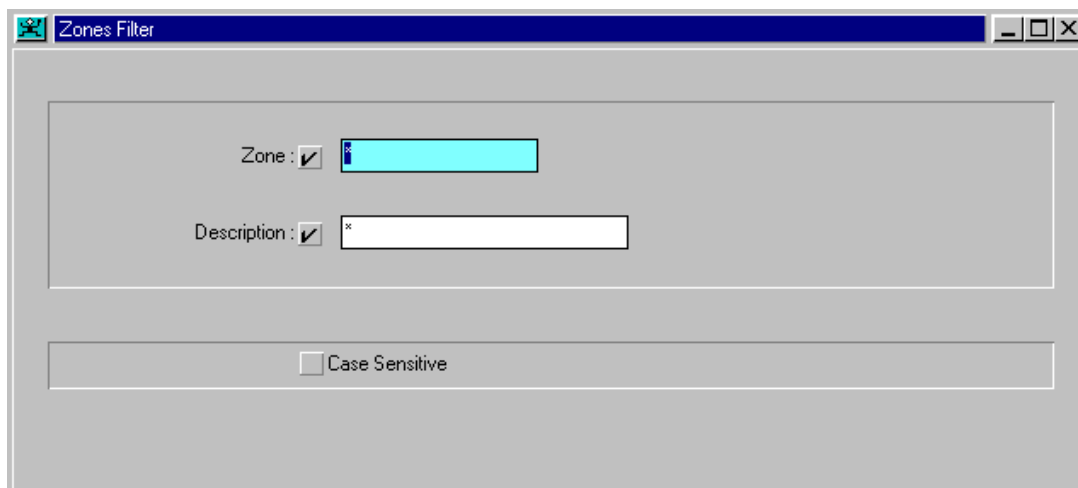
All the selectors and all the list-boxes can be filtered.

The filter allows the selection of records according to selection criterions specified by the user.




On the lists or selectors the filter is called using a specific button or by the key **F11**.

After using the triggering button of the filter or the key **F11**, the following filter will be displayed:

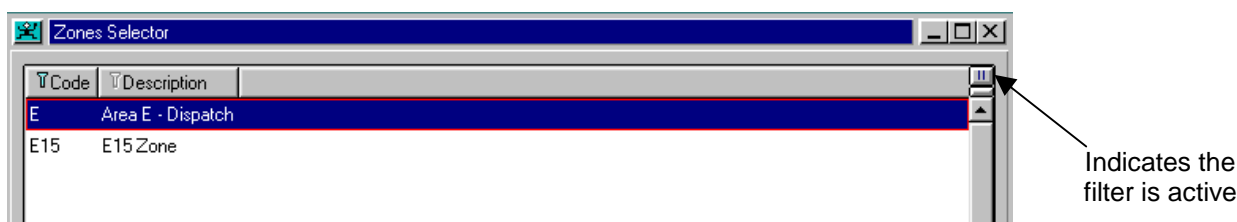


The button "Case Sensitive" determines if system has to take into consideration the Upper Case and the Lower Case (by default it's not taken into account) during filtering.

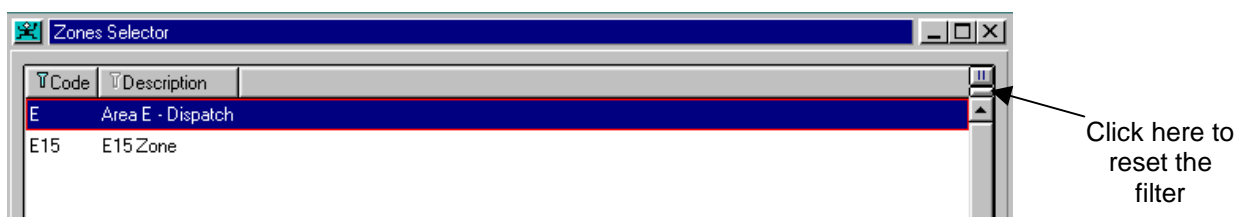
Use the "Esc" key on the keyboard to suspend the execution of the filter.

After specifying the criteria, click on the  icon to activate the filter.

Now the filter triggering button contains the characters "||" which indicates that the filter is currently active on this selector:



To reset the filter, click on the reset button lying just below the filter triggering button:



## 2.4.1 Use of Wild Card Characters

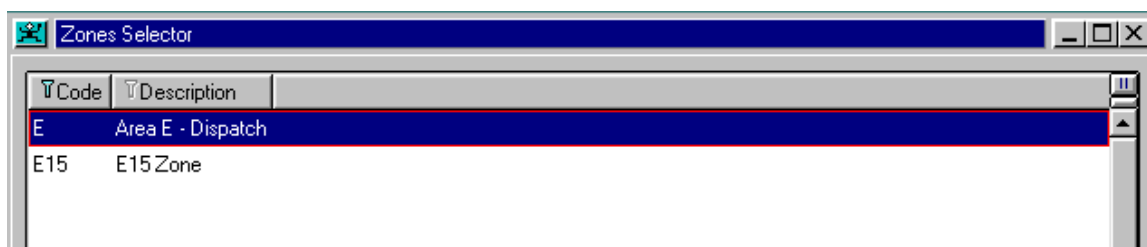
Within the selection criteria, the wild card characters “?” and “\*” can be used.

The character “\*” replaces a string of characters of an undetermined length.

The character “?” replaces one character.

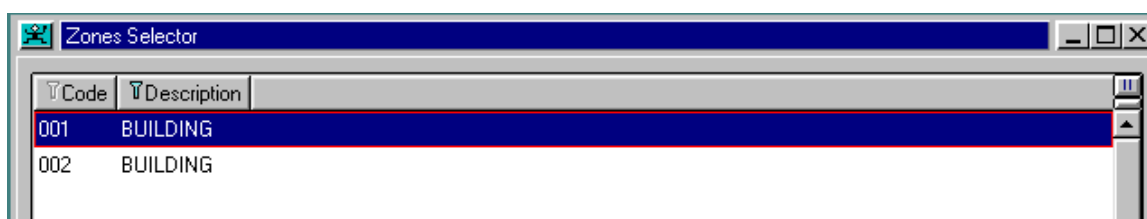
EXAMPLE: If the user specifies ‘E\*’ as the filter criteria for zone:

Only the zone code beginning by the character "E" will be selected. After validation, the selector will be displayed as following:



ANOTHER EXAMPLE: If the user specifies ‘??IL\*’ as the criteria for description:

Only the zone with characters ‘I’ and ‘L’ at the 3<sup>rd</sup> and 4<sup>th</sup> position of the description will be selected. The selector will be displayed as follows:



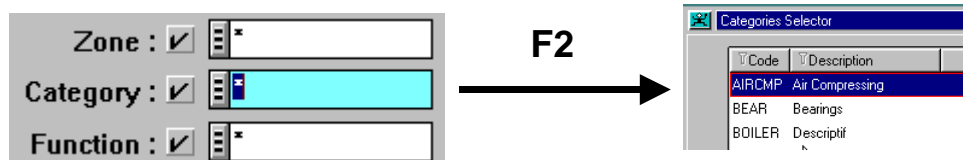
The result of the last filter is kept in memory until we close the corresponding module. If you open the selector again, you will find the result of the last executed filter.

You may reset the filter by click on the small button just below the filter button.

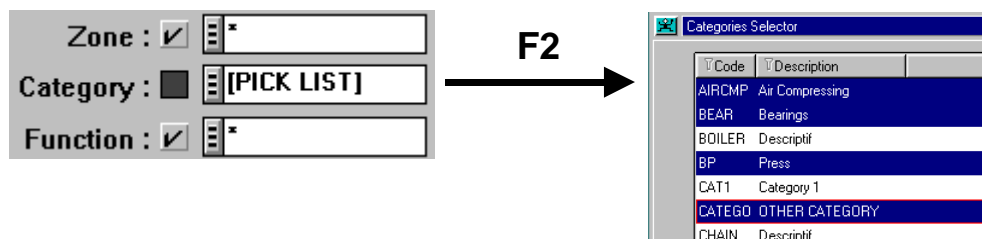
## 2.4.2 Available Filter Functions

Three types of selection modes are available:

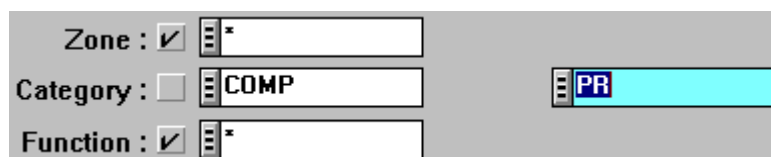
1. *The box is ticked:* It is the default mode, used for search with wild card characters. Using F2 or by click on the selector button, only one value can be selected from the choice list.



2. *The box is black:* It is the "Pick list" mode. The filter is defined for one or several values of the specified criteria. Using F2 or by click on the selector button, it is possible to choose several values from the choice list.



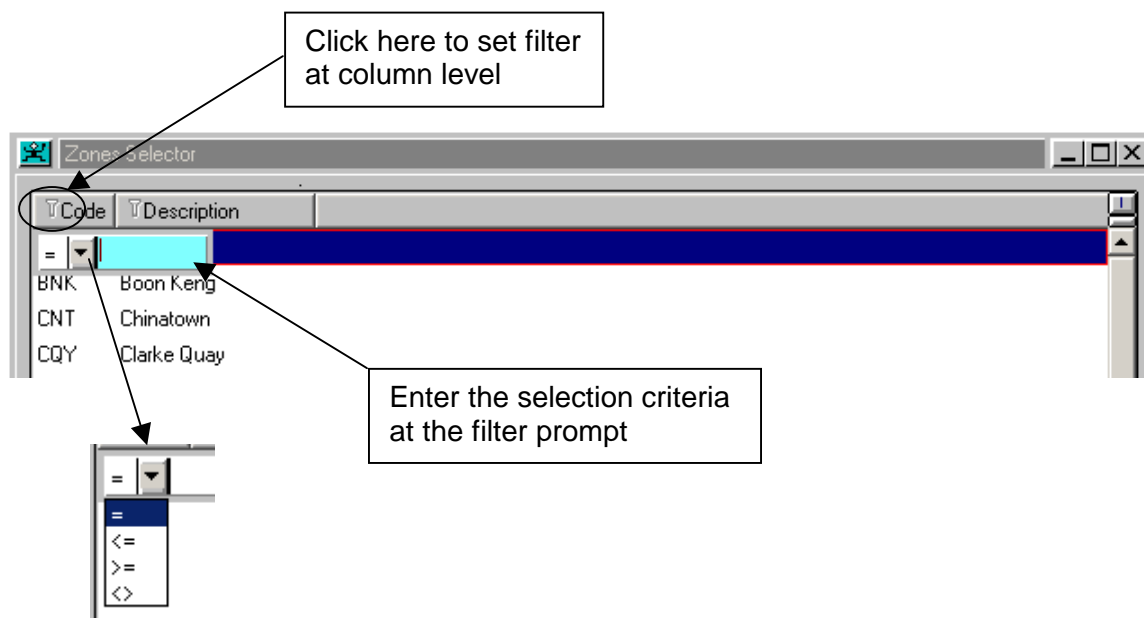
3. *The box is empty:* It is the "Between" mode. It selects the records for which the value lies between the minimum and the maximum of the criteria. Please note that numbers are considered to be smaller than alphabets (in ASCII order).



### 2.4.3 Set Filter at Field Column of Selector

It is also possible to set filter at the individual columns of the selector without using the Filter button.

Click on the 'T' symbol at the header of the column where filter is to be set, and a filter prompt will appear:

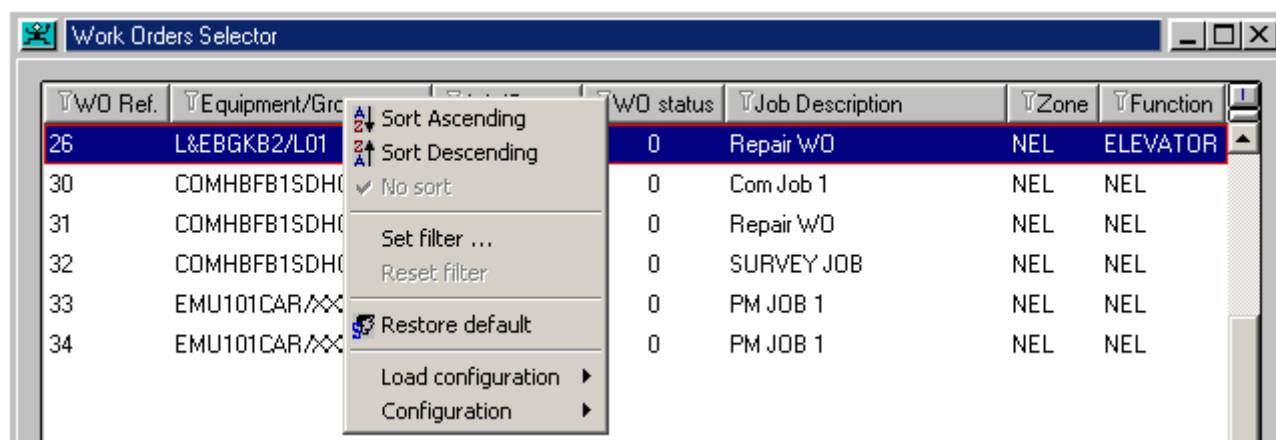


Enter the selection criteria at the filter prompt.

## 2.5 OTHER FUNCTIONS AVAILABLE AT THE SELECTOR WINDOW

There are several standard functions provided at all COSWIN Selector windows.

While placing the mouse cursor at the header of one of the field column in the selector and click on the right-mouse button, the following shortcut window will appear:



#### Sort Ascending

This option, when selected, will sort all records displayed in the selector in ascending order of the selected column.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 17 Date: 3 June 2002

Note: This option can also be activated through a normal left mouse button click on the column header of the field that required to be sorted.

### Sort Descending

This option, when selected, will sort all records displayed in the selector in descending order of the selected column.

### No Sort

This option, when selected, will reset the sorting option selected previously.

### Set Filter

This option, when selected, will activate the filter option for the selected column:



### Reset Filter

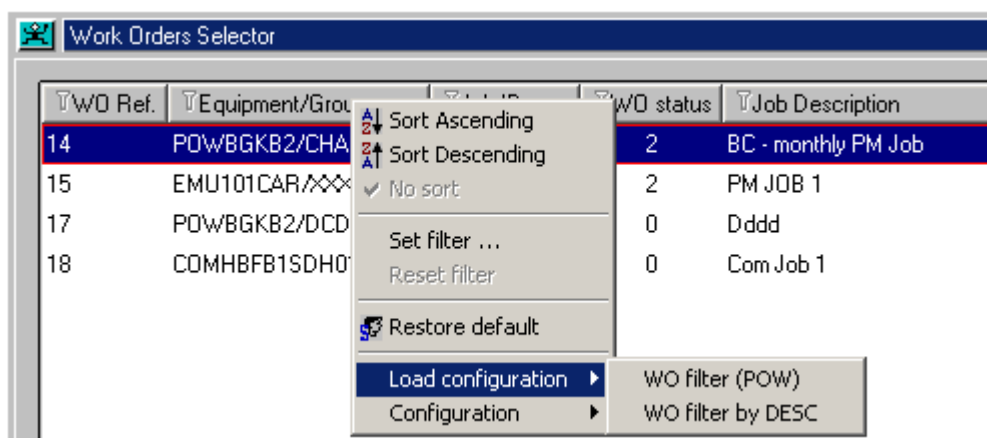
This option, when selected, will reset the filtering effect previously activated.

### Restore Default

This option, when selected, will reset all the filtering and sorting effect that are set previously.

### Load Configuration

This option, when selected, will display the list of previously created configurations on filter and sorting on this selector:

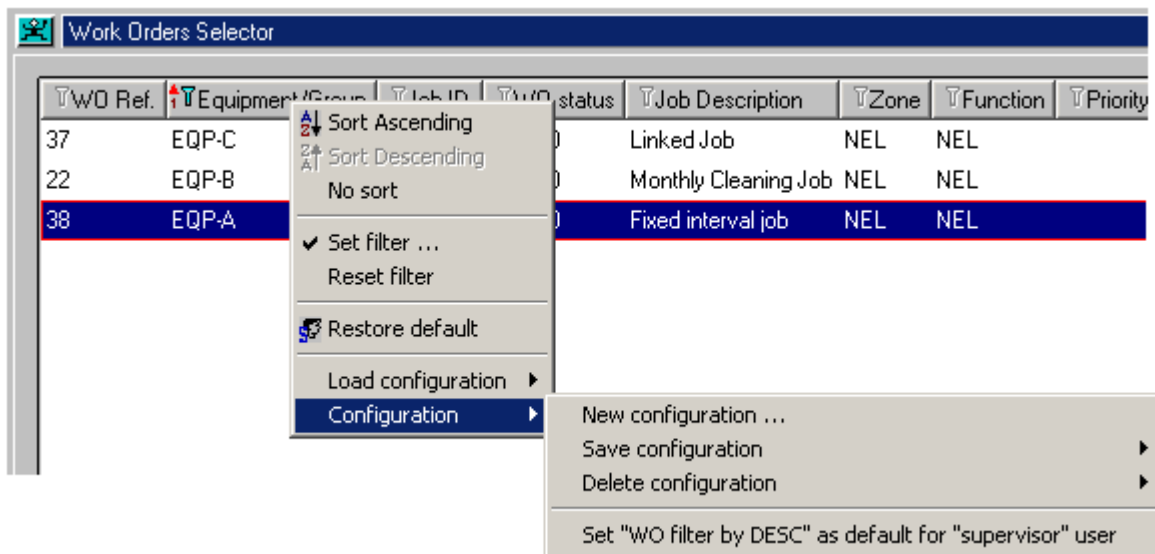


Once one of the configurations is selected, system will apply the filtering and sorting effect defined in the selected configuration to the current selector.

Note: The currently selected (active) configuration will have a 'Tick' symbol appear next to it.

### Configuration

This option allows user to create new configuration, save the modification to the existing configuration and delete the existing configuration, as well as setting the currently active configuration for the current login user.



**New configuration** is to create new configuration based on the currently set filters and sorting.

**Save configuration** is to update one of the existing configurations.

**Delete configuration** is to delete one of the existing configurations.

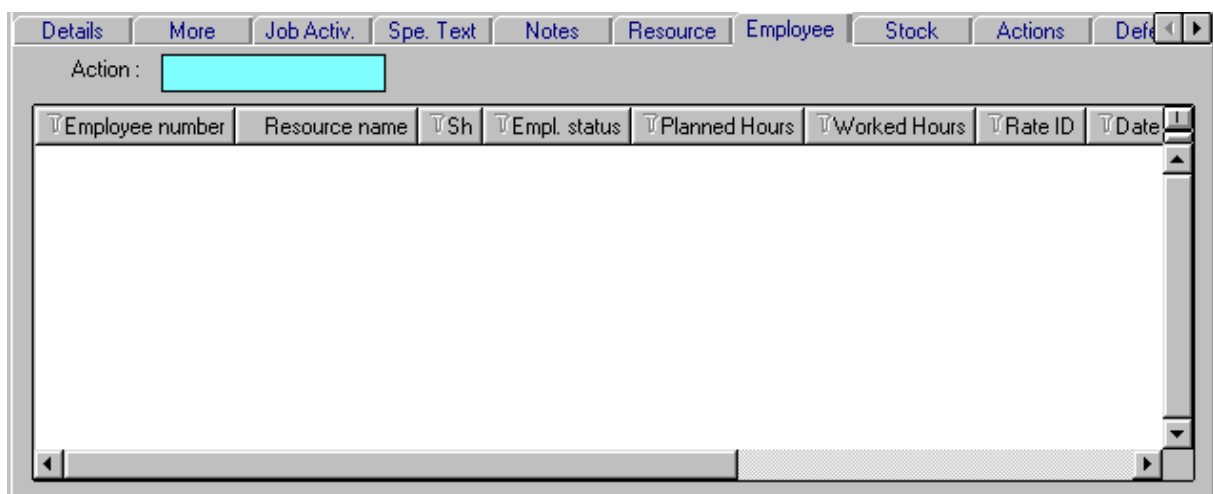
Note: if the currently active configuration at the selector is not the default configuration, then an option is available to set it as the default configuration for this user at this selector.


## 2.6 ADD INSIDE A LIST

It is necessary to use a detail window to add data to a list. It is impossible to enter data directly into the list window.

**EXAMPLE:** To add employee usage for a WO.

In the WO Details, choose the Employee tab and the following window is displayed:



To add a feedback record to the Work Order, click the  button and the Employee Feedback detail window will be displayed:

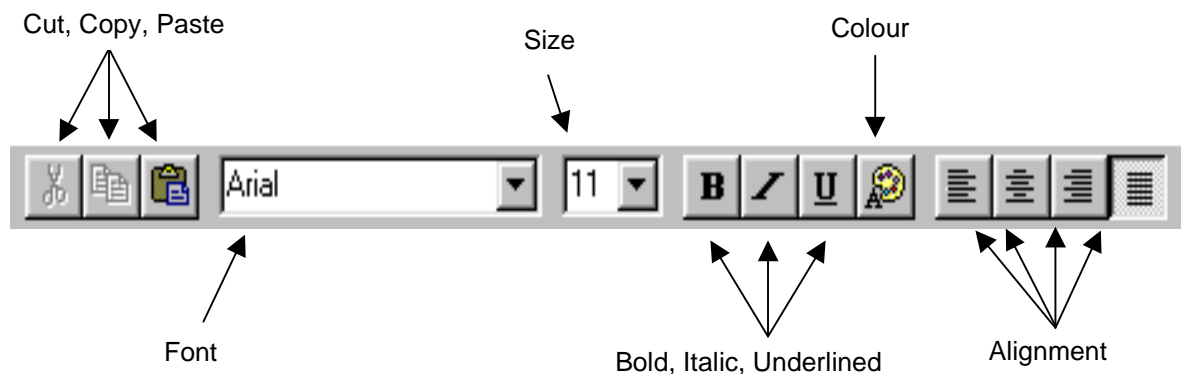


Or click on the right mouse button and the Online Employee feedback window will be displayed:

## 2.7 ACTION AVAILABLE ON A TEXT FIELD

This toolbar giving access to the functions Cut, Copy, Paste, Font, Size, etc...

It can be activated by selecting the menu option Window / Toolbar Options / Formatting. This toolbar looks like below:



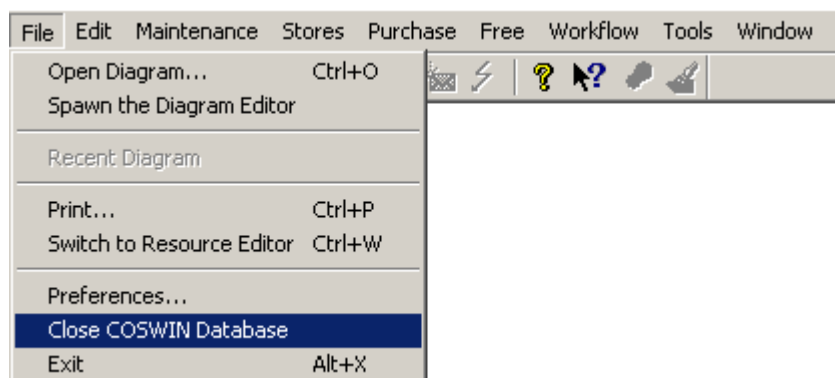
The "Format" function of this toolbar is available for all OLE fields in COSWIN in Modify mode. The Cut, Copy and Paste functions are available for all the fields.

**REMARK:** All the toolbars (except the main one) can be moved around COSWIN C/S 5 screen area.

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Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 20 Date: 3 June 2002

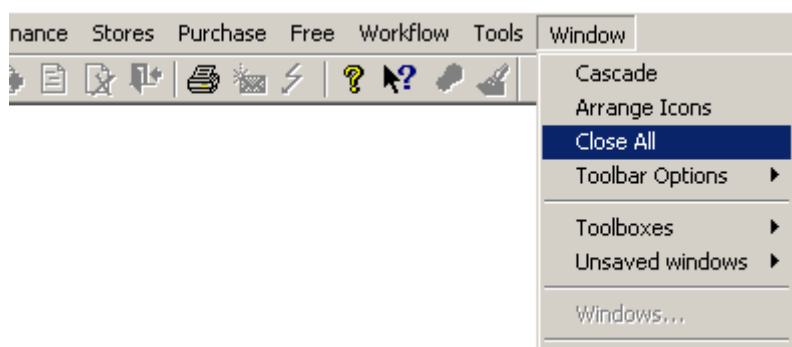
## 2.8 USEFUL MENU FUNCTIONS

Option **FILE** – Closes COSWIN database



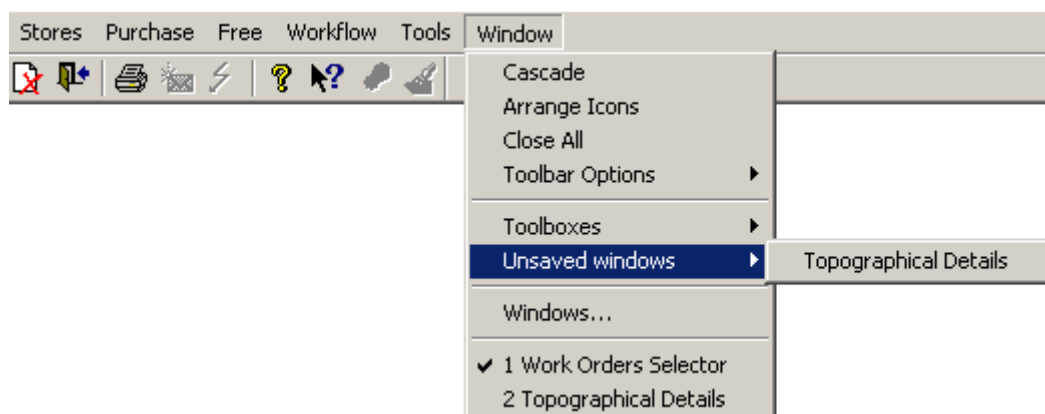
Closes the COSWIN database, without closing COSWIN. It can be useful to protect an unused computer station from illegal access without closing completely COSWIN.

Option **WINDOW** – Closes all



Closes all the opened windows using one single action.

Option **WINDOW** – Unsaved windows



Shows the list of windows have been modified but not been saved yet.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 21 Date: 3 June 2002

## 2.8.1 Shortcut Key

CTRL+L Load a record

CTRL+D Delete a record

CTRL+N Create a new record

CTRL+P Print

CTRL+S Save a record

CTRL+F Open directly the filter of the active field from a details window

## 2.8.2 Date fields

The date fields have all a prefixed format, It is just necessary to input the numbers, the separators "/" are automatically placed.

The F3 key on a date field allows to get the current date and the key F4 opens a calendar from which it is possible to choose the required date (equal to the "Gadget" button of the standard toolbar).

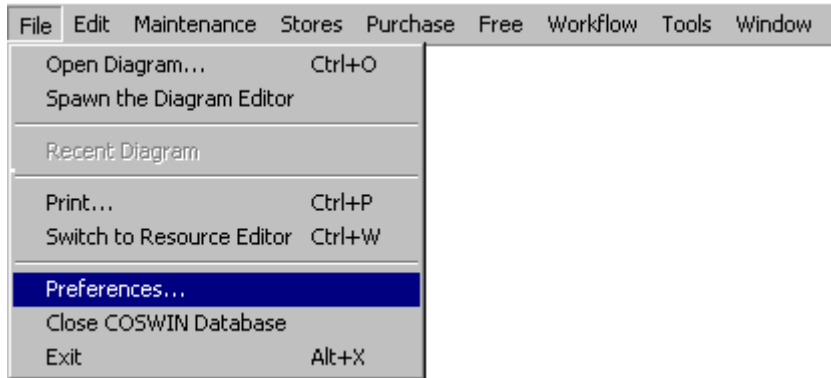
## 2.8.3 Copy/Paste

These classic functions of Windows world can be used via the edit menu and the "Formatting" toolbar.

The sequences "Ctrl + C" (copy) and "Ctrl + V" (Paste) are available inside COSWIN.

## 2.9 PREFERENCES

"Preferences" is placed in the COSWIN menu option File \ Preferences.

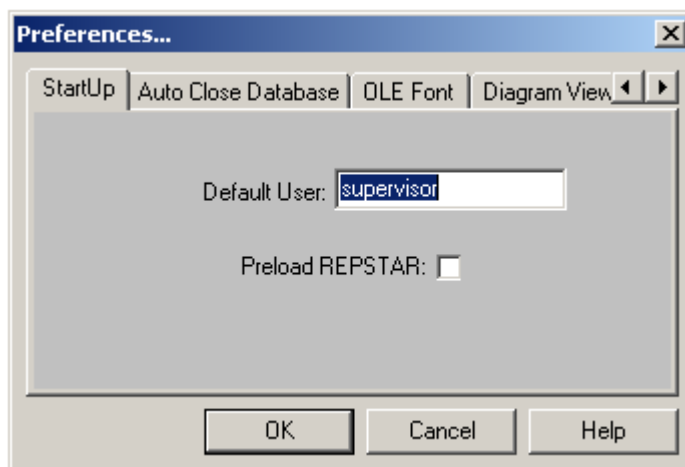


### StartUp tab:

It is possible to define the following parameters:

The default user that will be displayed in the Login window of COSWIN

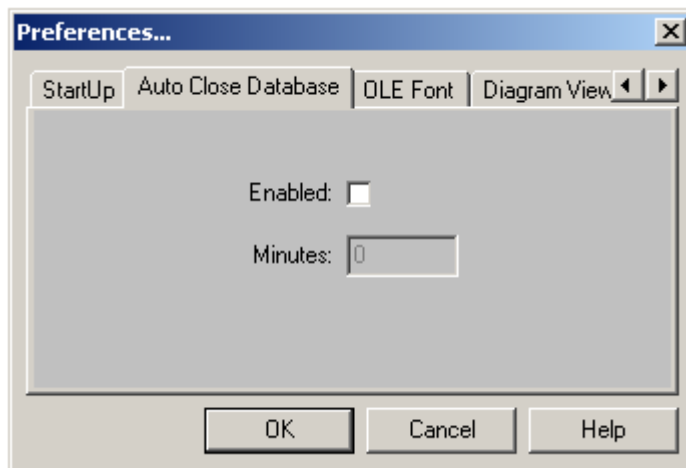
The automatic loading of REPSTAR upon launching of COSWIN.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 23 Date: 3 June 2002

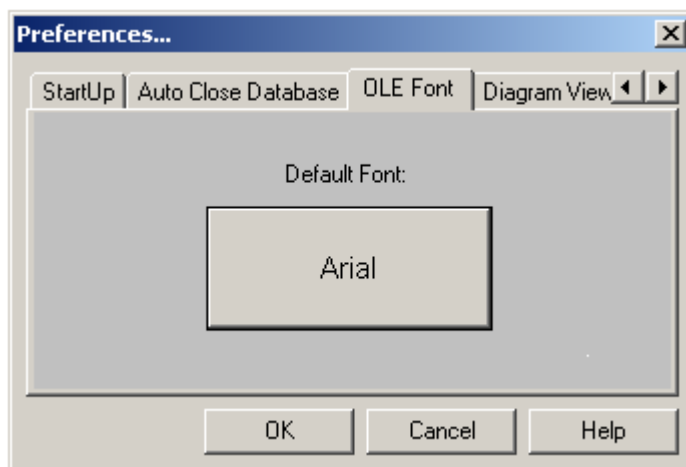
#### Auto Close Database tab:

This option allows to logout automatically COSWIN from the database after a prefix time without actions.



#### OLE Font tab:

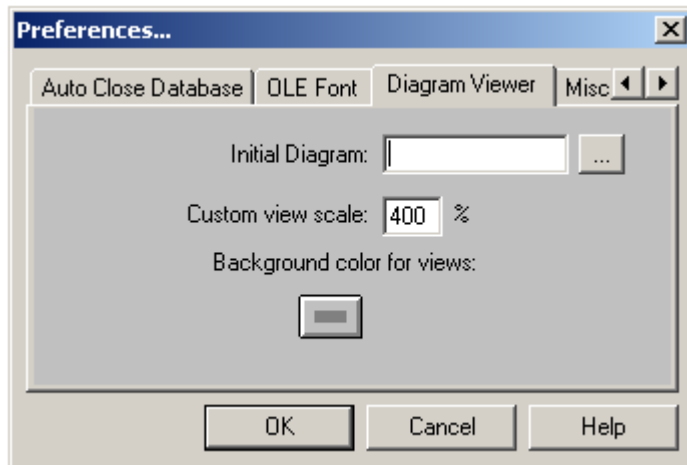
This tab defines the default Font used for all the OLE text areas of COSWIN.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 24 Date: 3 June 2002

#### Diagram Viewer tab:

This option allows loading of a given diagram directly upon the launch of COSWIN.



#### Miscellaneous tab:

Various options available:

Shows the help box (Yellow contextual menu available after a few moment on a field)

Opens the modules in "Details" mode or open their selectors.

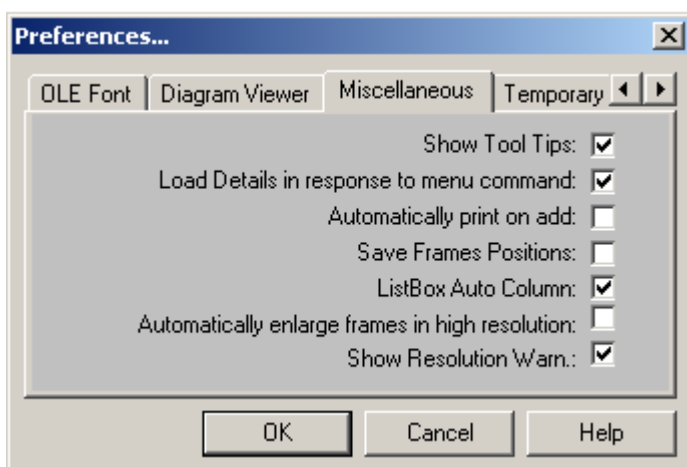
Activates automatic printing after a record is added.

Keeps in memory the last windows positions.

Adjusts automatically the size of the selector columns according to their contents.

Enlarges frame automatically in the high resolution.

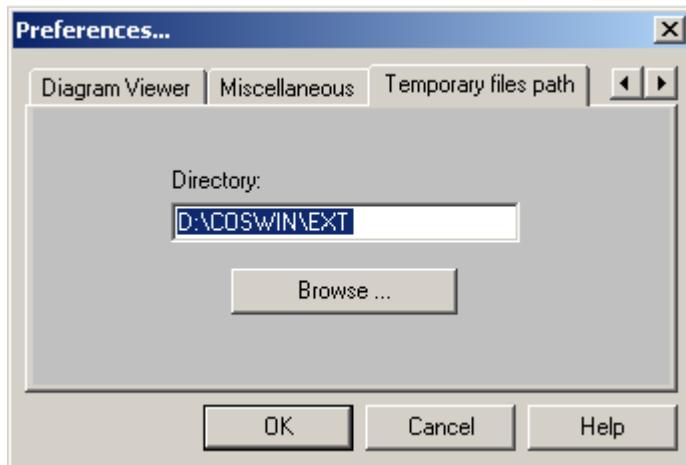
Displays resolution warnings.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 25 Date: 3 June 2002

### Temporary files path:

This defines the directory in which the COSWIN temporary files will be stored.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 26 Date: 3 June 2002

### 3. COSWIN SECURITY CONFIGURATION

#### 3.1 INTRODUCTION

Whether you are using COSWIN in single user or multi-users version, there could be many users using the package. You may wish to restrict entry into certain modules or restrict operations in these modules. You can do this through the **Security** options from COSWIN Configuration.

Each COSWIN user will be assigned with the following details:

LOGIN NAME which identifies the user at login and cannot be changed.

PASSWORD to authenticate the user during login.


The GROUP to which the user is assigned.

ACCESS RIGHTS which define the COSWIN modules and/or the functionality of the modules which the user is given the access.

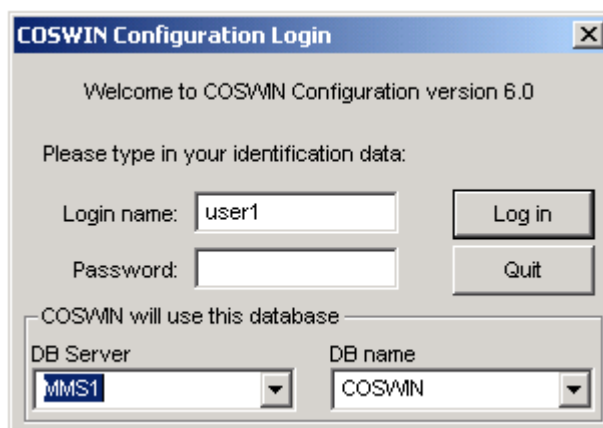
By default, a user ID "supervisor" and a group code "everybody" are defined in the database. They both have all the access rights in conformity with the licence and cannot be deleted from the database.

The supervisor ID is not a member of any group. He always has the maximum rights in conformity with the licence and these rights cannot be modified.

#### Login to COSWIN Configuration Menu

To log onto COSWIN Configuration menu, either click onto the shortcut  if it already created on the desktop, or select it from the window start menu **Start → Programs → COSWIN → Coswin CS 5.0 Configuration**.

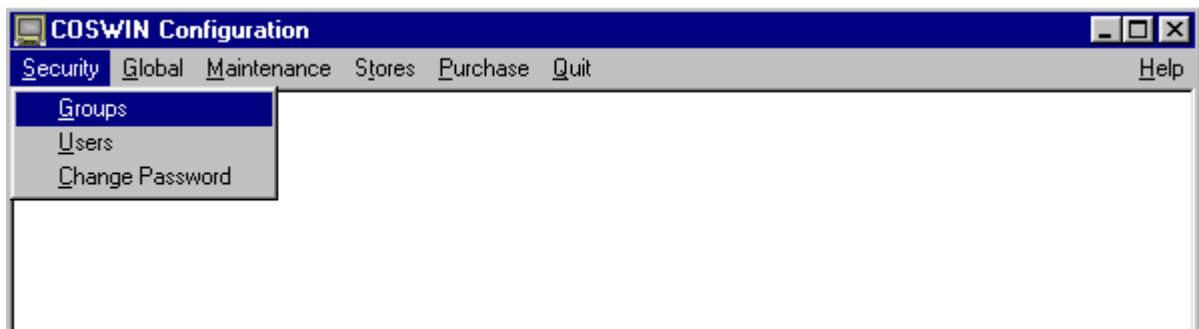
Once the application is invoked the following login screen will be prompted:



The user will have to key in his/her respective login name and password and click the **Log in** button.



Select **Security** option in the **COSWIN Configuration** menu.



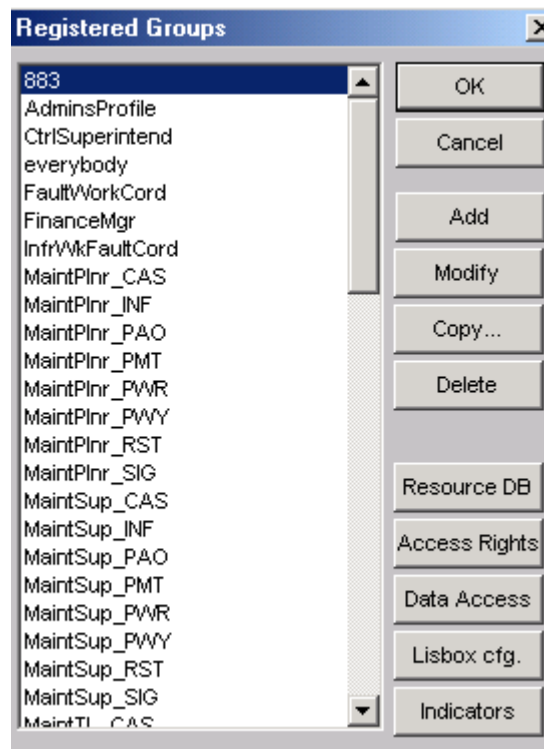
Only Supervisor ID is able to access the **Groups** and **Users** commands.

For the other users, the **Security** option will only contain the **Change Password** command.

## 3.2 DEFINE GROUPS

*Path:* Security/ Groups

COSWIN allows defining groups for collection of users sharing similar access rights.



### 3.2.1 Adding a New Group

Click on the **Add** button, and the following window appears:

#### Group name

It is the name of the group. It can be any alphanumeric characters not more than 15 characters.

#### Company Entity

This denotes the company entity that the group belongs to. It is an optional information.

#### Count Active Time

If checked, the users belonging to this group will only be permitted to use the COSWIN session within the time frame specified in the Max Active Time field.

#### Max Active Time

This specifies the maximum duration of time in minutes that the group is allowed to use COSWIN.

#### Count Inactive Time

If checked, the users belonging to this group will have their sessions terminated by COSWIN once their sessions are left inactive or idle for more than the maximum limit specified in Max Inactive Time field.

#### Max Inactive Time

This specifies the maximum limit of time in minutes that the session is allowed to be inactive or idle before COSWIN terminates the session.

### 3.2.2 Modifying an Existing Group

Select the group to be modified and click on the **Modify** button. A window similar to that of addition will appear. All fields can be modified except the Group Name.

### 3.2.3 Copying from an Existing Group

Select the group to copy from and click on the **Copy** button. The following screen will appear:

#### To Group

It must be an existing group different from the From Group.

#### Copy Rights

If checked, COSWIN will copy all the access rights of the From Group to that of the To Group.

#### Update Users

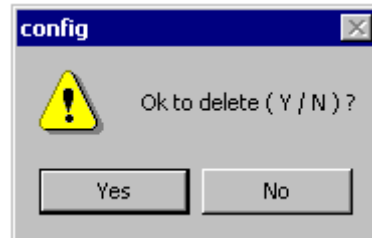
If checked, COSWIN will the update the users belonging to the To Group with the changes copied to the To Group.

#### Copy Reports

If checked, COSWIN will copy all the reports assigned to the From Group to that of To Group.

### 3.2.4 Deleting an Existing Group

Select the group to be deleted and click on the **Delete** button. The following window will appear to prompt the user to confirm the deletion:



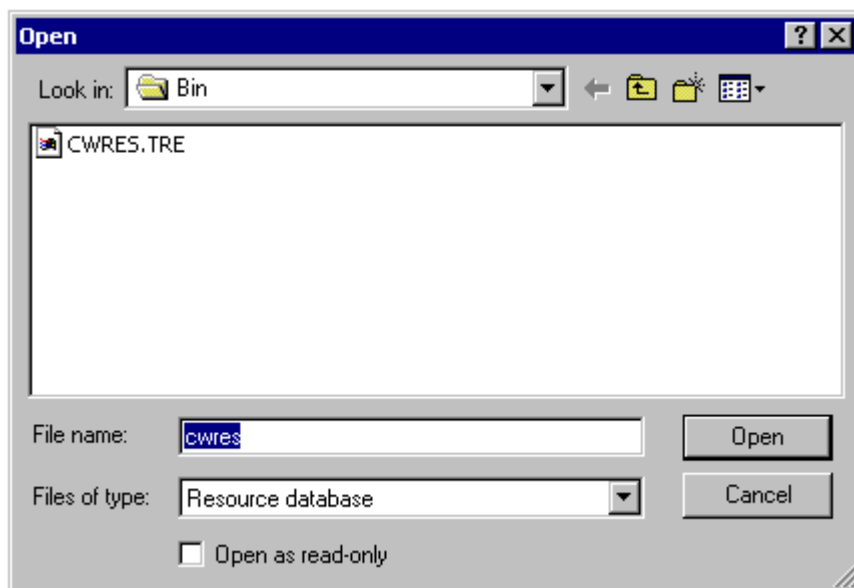
If **Yes** button is selected, the group will be deleted.

### 3.2.5 Attaching a Screen Configuration

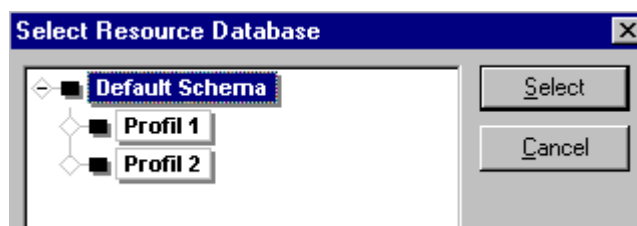
Screen Configuration determines the looks and feels of COSWIN applications modules.

All COSWIN groups and users will be assigned with the default screen configuration by default. It is possible to create customised screen configurations and attached them to the groups/users. The screen configurations can be modified using Resource Editor of COSWIN (Refer to Resource Editor documentation for details).

To change the screen configuration assigned to the group, click on the **Resource DB** button. The following window will appear:



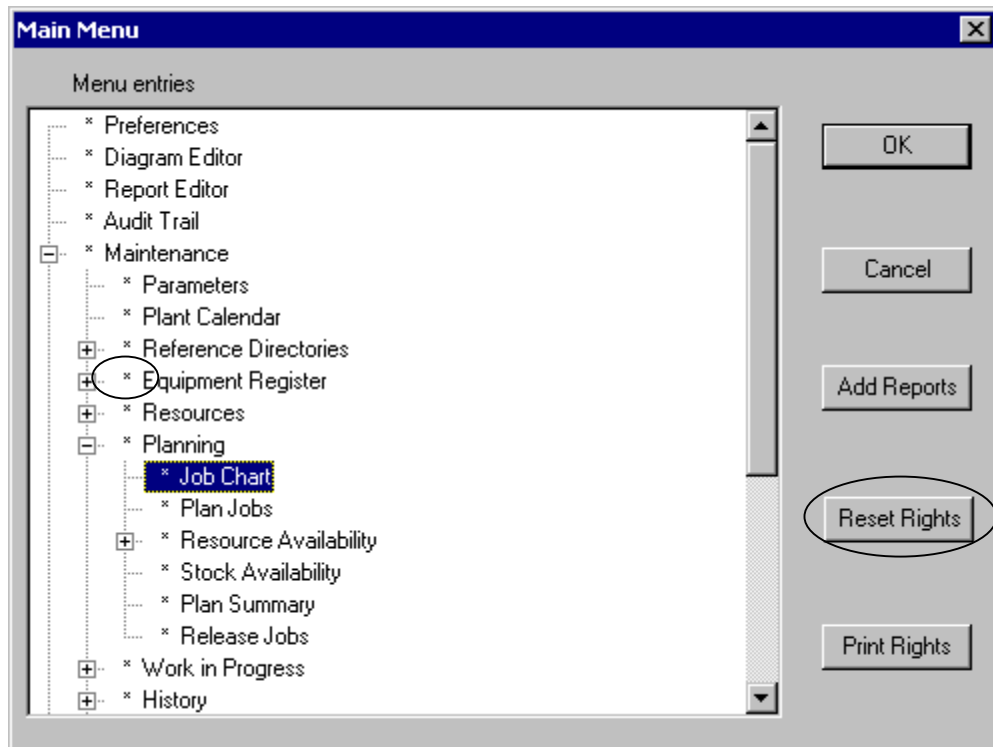
Select the resource file to attach and click the **Open** button.



If sub-schemas have been defined in the default schema, then you select the specific sub-schema to assign to the group.

### 3.2.6 Assigning Access Right

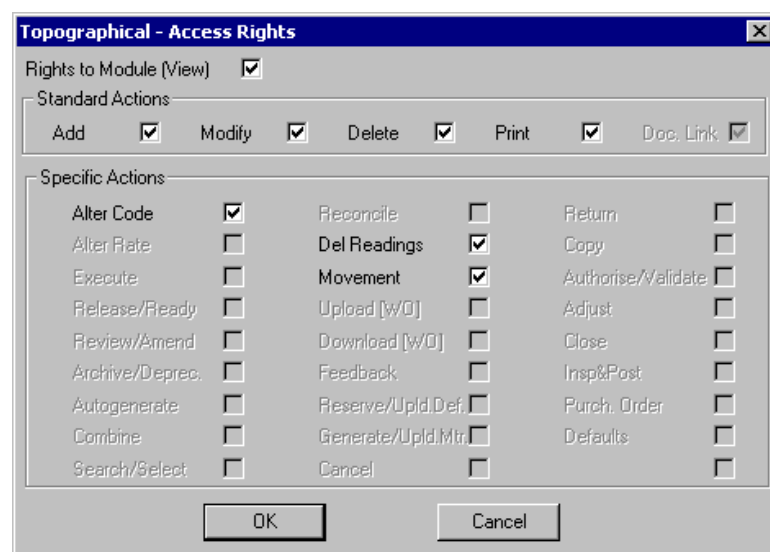
Select the group to modify and click on the **Access Rights** button. A window listing all the COSWIN modules will be displayed:



An asterisk (\*) beside the module name indicates that access right to that module has been granted.

To un-assign the access right, click on the **Reset Rights** button.

Double click on any of the module's name, the detail Access Right window will be displayed:



User can checked on any of the available options to activate the respective access rights.

### 3.2.7 Attaching Reports to a Coswin Module for a Group of Users

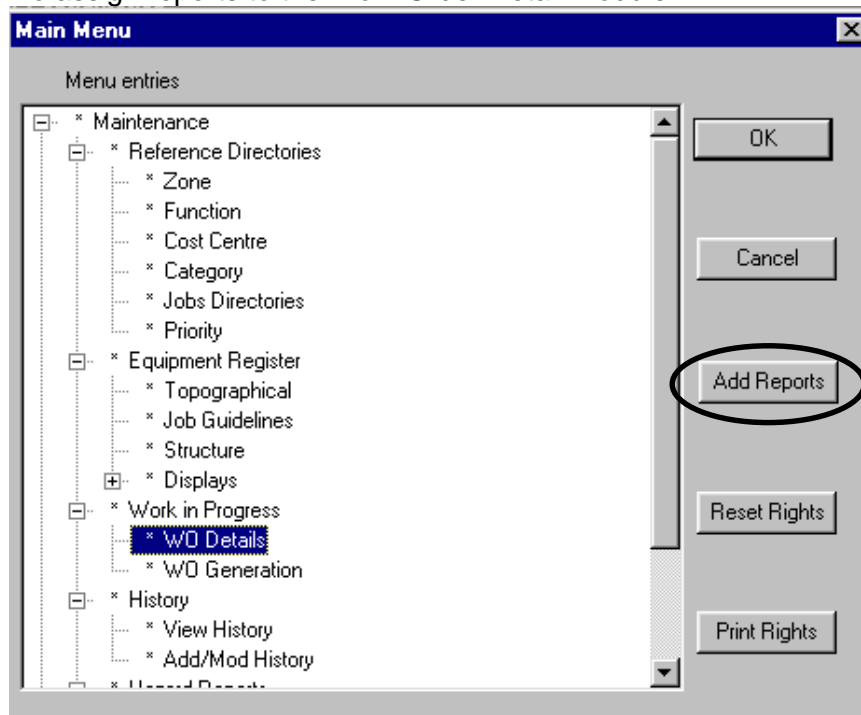
All reports created with REPSTAR can be integrated into COSWIN. It is also possible to attach reports to any COSWIN module for certain groups or certain users.

All reports attached to any group of users can be accessed by the Supervisor.

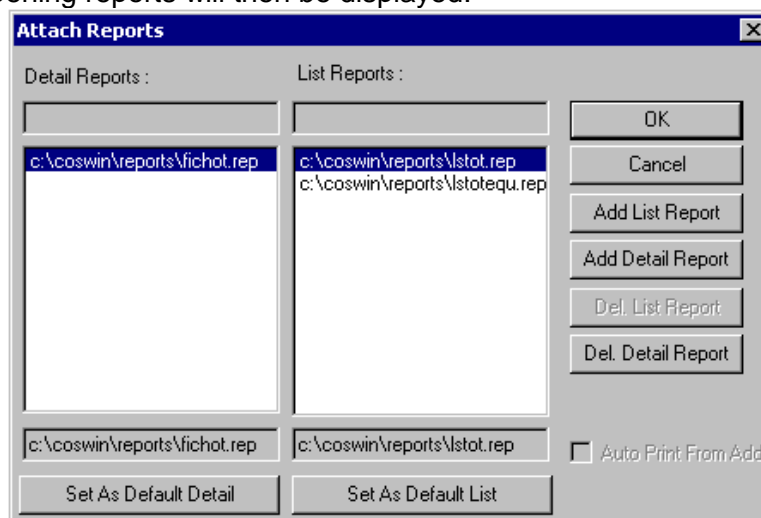
All reports attached to the group "everybody" are also accessible for all the other users, regardless of the group.

The "everybody" group should have all standard reports attached in all respective modules.

EXAMPLE: To assign reports to the Work Order Detail module:



From this window, select the WO Details module and click the **Add Reports** button. The window for opening reports will then be displayed:



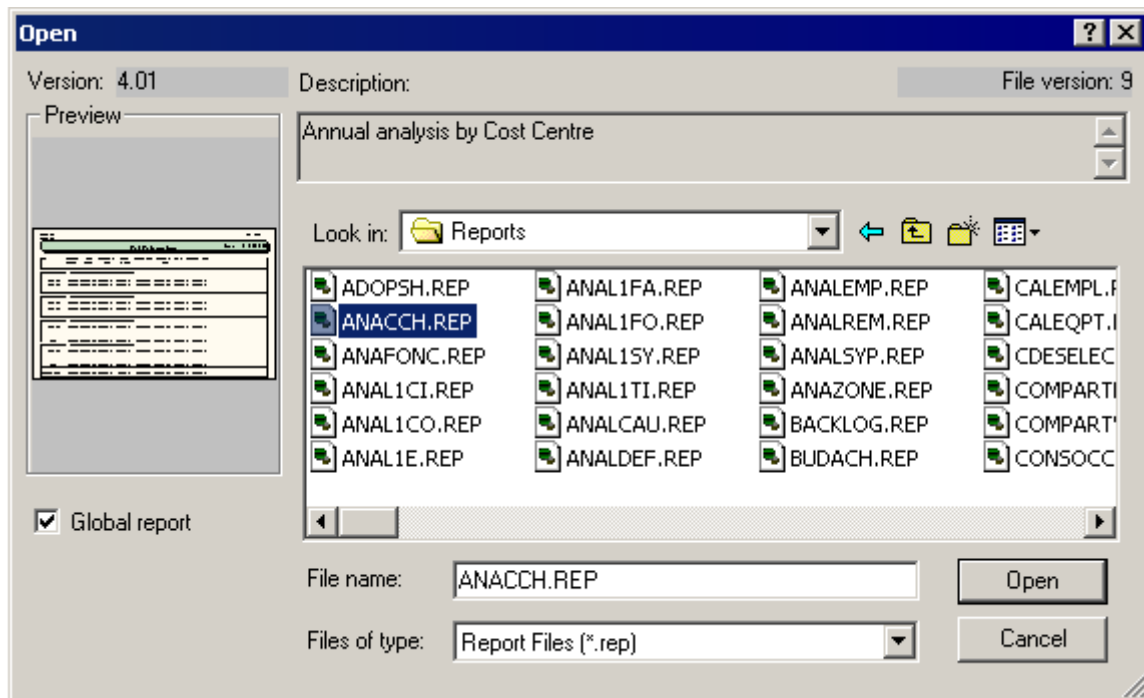
Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 33 Date: 3 June 2002

**Detail Reports** window displays the list of detailed reports provided when printing is requested from the module.

**List Reports** window displays the list of listing reports provided when printing is requested from the module.

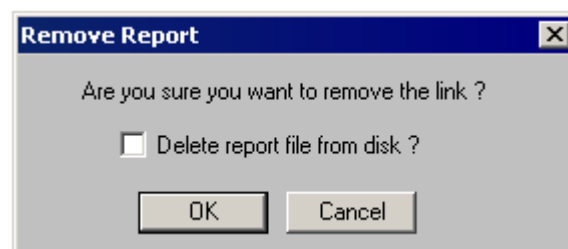
The **Add List Report** button will add a report to the **List Reports** window and the **Add Detail Report** button will add a report to the **Detail Reports** window.

When the **Add List Report** button or the **Add Detail Report** button is pressed, the following File Open dialog box will be opened to select reports for addition:



The **Del. List Report** button will delete a report from the **List Reports** window and the **Del. Detail Report** button will delete a report from the **Detail Reports** window.

To delete a report, choose a report from a list and press the respective delete button. The following window will be displayed to prompt for confirmation of deletion:



The **Delete report file from disk** option is unchecked by default. If checked, COSWIN will physically remove the report file from hard disk.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 34 Date: 3 June 2002

As it is possible to attach several different reports to the same module, COSWIN has provided 2 buttons, **Set As Default Detail** and **Set As Default List**, to set one of them as the default reports when printing option is requested from COSWIN module. Select a report from the display window and click on the respective “Set As Default” button will set the selected reports as default. The text boxes above the “Set As Default” buttons display the reports currently being selected as default.

The **Auto Print from Add** checkbox when checked, allows the automatic printing the Default Details Report, every time a new record is added in the COSWIN module.

### 3.2.8 Printing the Assigned Access Rights of a Group of Users

To print a hardcopy listing of the access rights assigned to a group of user, click on the **Print Rights** button on the **Access Rights** main window.

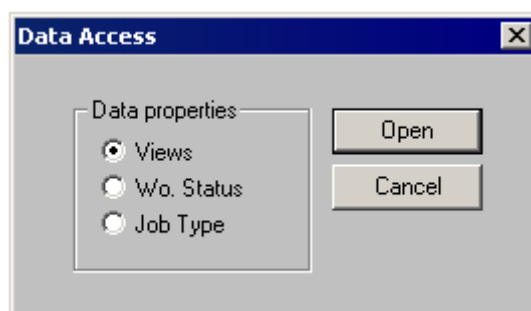
### 3.2.9 Assigning Data Access Rights for a Group of Users

By default, all users are able to view all the data exist in the modules as long as they are given access right to the module. However, it is also possible to restrict the access to certain group of data for some group of users.

There are 3 main type of data access control available in COSWIN:

- Views (of entity, zone, function, store)
- Work Order Status
- Job Type

Click on the **Data Access** button on the Registered Group main window and the following window appears:





### 3.2.9.1 Data Access Control by View:

Options:

DIR\_ZONE  
DIR\_UNIT  
STORES  
COH\_ENTITY

Options:

=  
<>  
>=  
<=  
>  
<  
LIKE  
NOT LIKE  
IN  
NOT IN

To create a data access control to restrict view on Zone such that only equipment belonging to Zone 'BGK' can be viewed:

1. Select the 'DIR\_ZONE' under Table combo field.
2. Select '=' under the Operator combo field.
3. Input the value 'BGK' under the Value text field.
4. Click on the Add button and the statement ZO\_ZONE = 'BGK' will be added to the view window.

4 Table options for data access control are available, namely:

**DIR\_ZONE** for access control through Zone

**DIR\_UNIT** for access control through Function

**STORES** for access control through Store

**COH\_ENTITY** for access control through Company Entity

### 3.2.9.2 Data Access Control by WO Status:

Wo. Status for Group

Validate: ☒

Group:

Status	Description	Syst. Code

OK  
Add  
Delete  
Cancel

This is to restrict the group of users to accessing only the Work Orders with specified status.

If the **Validate** checkbox is ticked, the selected group have access only to the work orders whose status present in the list.

After the Add button is clicked, a list of WO Status is displayed for selection:

WO Status

Status	Description	Syst. Code
0	Not Started	0
1	In Progress	1
2	Finished	2
3	Archivable	3

OK  
Cancel  
Add  
Modify  
Select

Select the desired WO status, click on **Select** button to mark the status for selection and click **OK** button when finished.

### 3.2.9.3 Data Access Control by Job Type:

Job Type for Group

Validate: ☐

Group:

Job Type	Job Type Description	Pty.	Bhv.

OK  
Add  
Delete  
Cancel

This is to restrict the group of users to accessing only the Work Orders of specified job type.

If the **Validate** checkbox is ticked, the selected group have access only to the work orders whose job type is present in the list.

After the Add button is clicked, a list of Job Type is displayed for selection:

Job Type

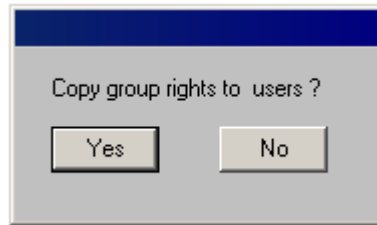
Job Type	Job Type Description	Pty.	Bhv.
ACC	Accident	5	0
CBM	Condition Based Mt	5	0
CM	Corrective Maint	5	0
DW	Daily Wash Rinse	0	0
DWD	Daily Wash Detergent	0	0
NW	No Wash	0	0
PM	Preventive Maint	5	1
SRM	Safety Related Mod	5	0
TI	Tech Investi/Trials	5	0
WW	Weekly Wash	0	0

OK  
Cancel  
Add  
Modify  
Select

Select the desired Job Type, click on **Select** button to mark the selection and click **OK** button when finished.

### 3.2.9.4 Copying the Access Rights of the Group to its Associated Users

Once the access rights of the group has been modified and saved, COSWIN will prompt whether to copy the changes made to the users:

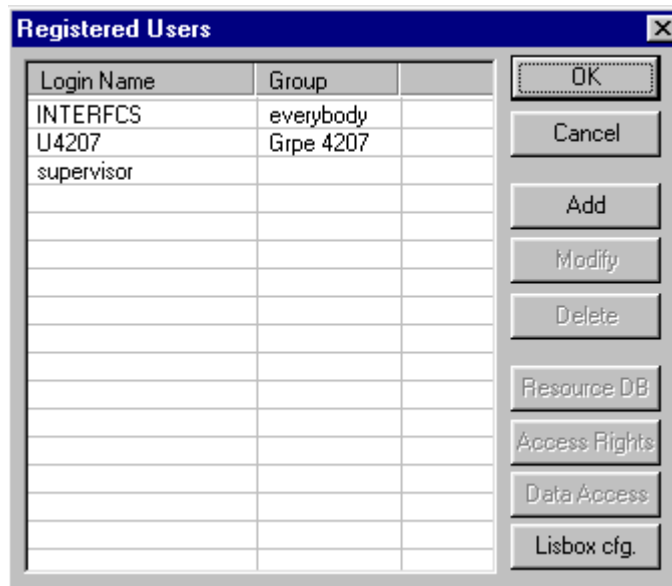


Selecting the **Yes** option will copy the access rights of the group to all the associated users.

## 3.3 DEFINE USERS

Any new user ID must be assigned with an existing group. The added user will inherit the access rights of the group and it is possible to customise the access rights for the user. His maximum rights are as that of the group which he is assigned to.

*Path:* Security/ Users



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 39 Date: 3 June 2002

### 3.3.1 Adding a New User

Click on the **Add** button, and the following window appears:

#### Login Name

It can be any alphanumeric or special characters except space, with a maximum of 15 characters.

#### Owner Group

It is the group that the user belongs to. It must be an existing group has been previously defined.

#### Change Password, Confirm password

It must be minimum of 5 alphanumeric characters.

#### Company Entity

This denotes the company entity that the user belongs to. It is an optional information.

#### Signature

This is the full descriptive name of the user.

#### Count Active Time

If checked, the users belonging to this group will only be permitted to use the COSWIN session within the time frame specified in the Max Active Time field.

#### Max Active Time

This specifies the maximum duration of time in minutes that the group is allowed to use COSWIN.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 40 Date: 3 June 2002

### Auto Load Monitor

This checkbox, if checked, indicates the Transaction Monitor module will be enabled for this user.

### Check Interval

This rule bar indicates the time interval in minutes that the system will check and update the status of Transaction Monitor for the user. The time interval can be increased by dragging the indicator rightward, or decreased by dragging leftward.

## 3.3.2 Modifying an Existing User

Select the user to be modified and click on the **Modify** button. A window similar to that of addition will appear. All fields can be modified except the Login Name.

## 3.3.3 Deleting an Existing User

Select the user to be deleted and click on the **Delete** button. The following window will appear to prompt the user to confirm the deletion:



If **Yes** button is selected, the user will be deleted.

## 3.3.4 Attaching a Screen Configuration and Reports, Assigning Access Rights and Data Access

These functions are similar to that defined for Group. Please refer to the respective sections under Group for details.

### 3.4 CHANGE PASSWORD

*Path:* Security/ Change Password

The module allows users to change their own login password.

The **Change Password** field is the new password and must be at least 5 alphanumeric characters.

The **Confirm Password** must be the same as the Change Password field.


**NOTE:** For the Supervisor to change the password for other users, use the Modify User detail option to assign new password.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 42 Date: 3 June 2002

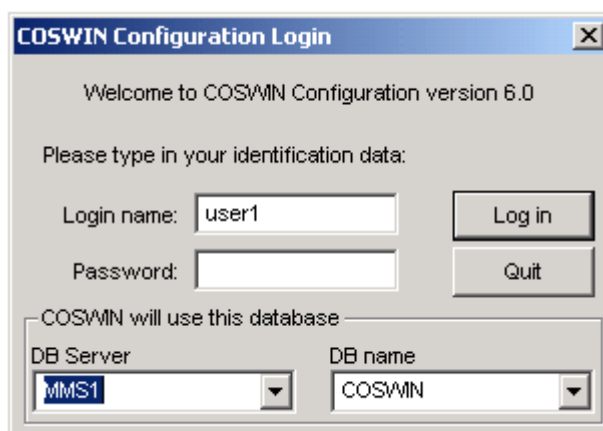
## 4. COSWIN APPLICATION CONFIGURATION

This chapter describes how the various parameters in COSWIN Configuration affect the behaviour of COSWIN modules.

### Login to COSWIN Configuration Menu

To log onto COSWIN Configuration menu, either click onto the shortcut  if it already created on the desktop, or select it from the window start menu **Start → Programs → COSWIN → Coswin CS 5.0 Configuration**.

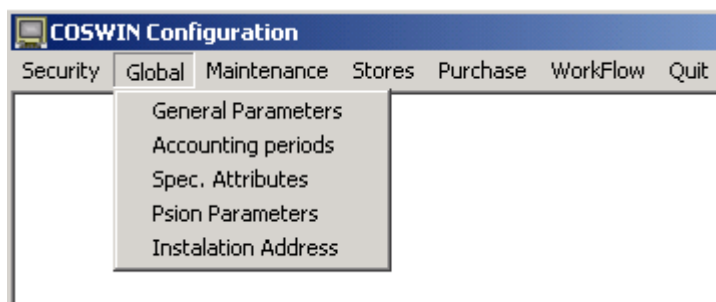
Once the application is invoked the following login screen will be prompted:



The image shows a 'COSWIN Configuration Login' dialog box. It has a title bar with a close button. The text inside says 'Welcome to COSWIN Configuration version 6.0'. Below this, it says 'Please type in your identification data:'. There are two input fields: 'Login name:' with 'user1' entered, and 'Password:' which is empty. To the right of these fields are two buttons: 'Log in' and 'Quit'. Below the input fields, it says 'COSWIN will use this database'. There are two dropdown menus: 'DB Server' with 'MMS1' selected, and 'DB name' with 'COSWIN' selected.

The user will have to key in his/her respective login name and password and click the **Log in** button.

### 4.1 GLOBAL PARAMETERS





Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 43 Date: 3 June 2002

### 4.1.1 Defining GENERAL PARAMETERS

*Path:* Global / General Parameters

#### Character for Yes

This is a one character code used for confirming an action. Default is set to 'Y'. *Once defined, subsequent modification of this parameter is not possible.*

#### Word for Yes

This is the word you use for confirmation. This is used only for display purposes.

#### Character for No

This is a one character code used for negating an action. Default is set to 'N'. *Once defined, subsequent modification of this parameter is not possible.*

#### Word for No

This is the word you use for negating. This is used only for display purposes.

#### Standard Currency

You will always be dealing with one standard currency while using COSWIN. Normally it could be your country's currency. Enter the currency code. You can enter this field only once. *Once defined, subsequent modification of this parameter is not possible.*

#### No. of digits

Select the number of digits after the decimal separator you will use for the currency you declared above. It affects all cost relation figures, like cost analysis for Zone, Function, Cost Centre, Budget; Contract Cost, etc.

#### Pivot Currency

This is the Conversion currency mandatory for those countries adopting the European Monetary System.

### Beginning month of the financial year

You can declare the first month of your financial year as any one of the 12 months. The first month need not be January. If you declare the first month as April, the financial year will be treated as April of year 1 to March of year 2. It is visible in the Stores\Reference Directories\Cost Centres (More tab). *Once defined, subsequent modification of this parameter is not possible.*

### Use the Validation Circuit

This checkbox, if checked, will activate the validation circuit used for transaction monitoring.

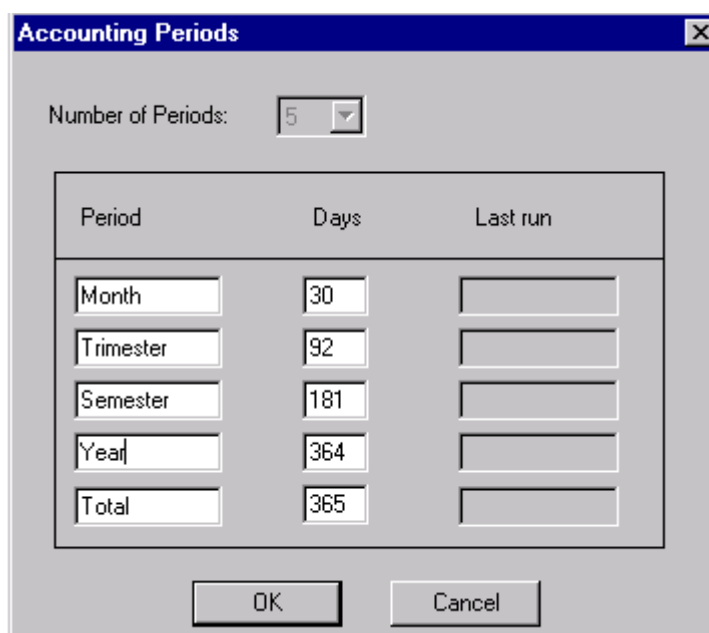
### Default Path

It is used to define the reference path of all COSWIN external files (like reports and results of searching in history). COSWIN will check first this parameter and if it is not specified will look in the current installation path.

## 4.1.2 Defining ACCOUNTING PERIODS

*Path:* Global / Accounting Periods

COSWIN allows 5 accounting periods to be defined. Cost will be tracked through each of the period defined. Each period must be reset using the Period end processing module.



The dialog box titled "Accounting Periods" has a "Number of Periods:" dropdown set to 5. Below is a table with columns "Period", "Days", and "Last run".

Period	Days	Last run
Month	30	
Trimester	92	
Semester	181	
Year	364	
Total	365	

At the bottom are "OK" and "Cancel" buttons.

### Number of Periods

You can select the number of periods to be between 2 and 5. *Once defined, subsequent modification of this parameter is not possible.*

### Period

This is the description for each period and is used only for your information on reports and displays. It can be changed at any time.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 45 Date: 3 June 2002

### Days

Enter a numeric value corresponding to the number of days for each period. Except for the requirement of two values equivalent to a month and a year, you can enter any value. This will be used for period end processing and can be changed at any time.

### Last Run

This is a display field. It shows the date on which the last period end processing was carried out.

## 4.1.3 Defining SPECIFICATION ATTRIBUTES

*Path:* Global / Specification Attributes

Technical specifications form an essential part of Equipment and/or item related data. Often these technical specifications are categorised into different classes like Mechanical, Physical, Chemical, Electrical Specifications, etc. COSWIN supports a maximum of 999 different classes of specification. Within each of these specification classes, 20 attributes can be defined.

Code	Description	
1	Engines	

### 4.1.3.1 Adding new Specification Class

You may add a class and its attributes by selecting the **Add** button in the main window for **Specification Attributes**. A secondary window (as shown below) is displayed.

The class code is automatically incremented by adding new classes of attributes.

**Description:** This is a 21 characters field.

**Attributes:** 20 fields of 21 characters each.

#### 4.1.3.2 Modifying existing Specification Class

Select a class of attributes from the displayed window and then press the **Modify** button. You may change the Description and each of the 20 attributes of the class.

**Specification Attributes - Modify**

Code:  Description:

Attributes:

Power In	
Power Out	
Voltage	

OK Cancel

#### 4.1.4 Defining PSION PARAMETERS

*Path:* Global / Psion Parameters

**PSION Parameters**

Use PSION for feedback: ☐

Size of PSION RAM:

Feedback on:

Datapack Size:

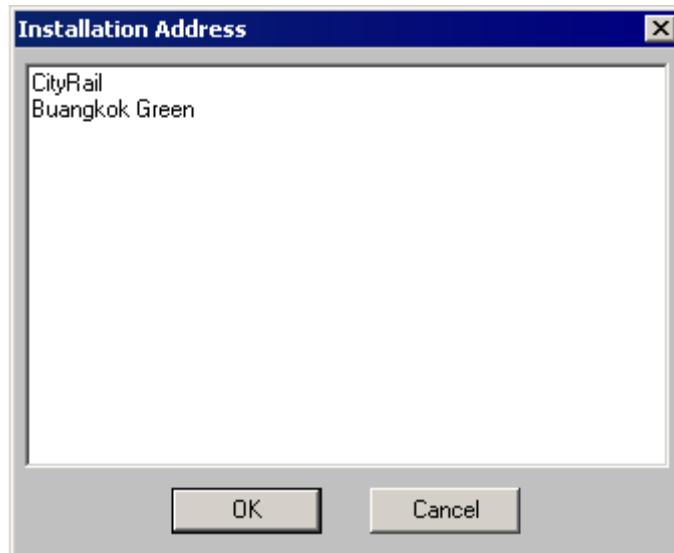
OK Cancel

Older version of COSWIN support using PSION hand held computer for feedback on Work Orders and recording defect incidence and meter readings.

***However this option is not used in newer version of COSWIN.***

## 4.1.5 Defining INSTALLATION ADDRESS

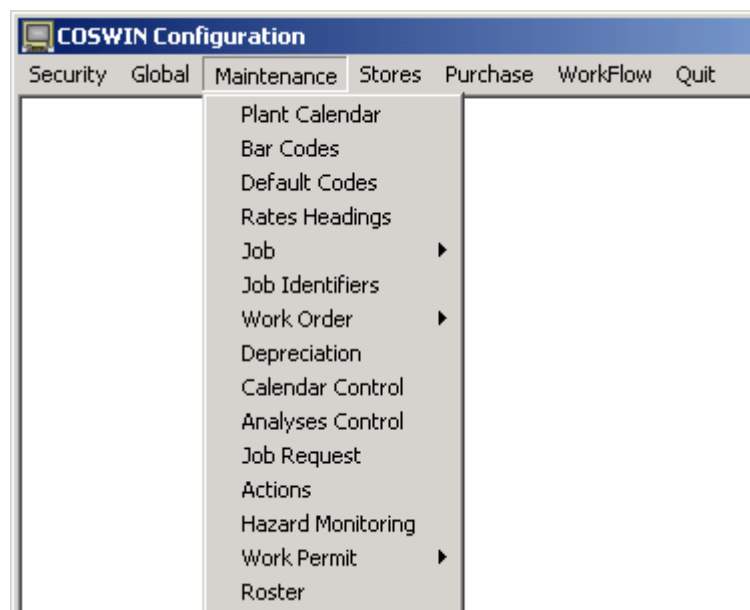
*Path:* Global / Installation Address



This is to specify the name and address of the organisation. It may be printed as a standard header in reports, if the reports have been formatted accordingly.

## 4.2 MAINTENANCE PARAMETERS

This section defines the various parameters to be used in the Maintenance module, also known as Asset and Work module.



## 4.2.1 Defining PLANT CALENDAR

*Path:* Maintenance / Plant Calendar

Plant Calendar is the main calendar of a plant in COSWIN.

It is mandatory to define Plant Calendar. Unless you define Plant Calendar, the option 'Calendar control ' or other options on "Maintenance" menu like 'Equipment Register', 'Planning', etc. cannot be invoked.

Plant Calendar is used at various places throughout the system. Some of its usage's are:

- Next job's date computation in Job Guidelines module for shutdown jobs
- Next job's date forecasting in the Planning module
- As the default calendars for Employees and Equipment's/Group.
- Display of Equipment status in 'Release' and 'Job Chart' modules.

Considering its wide usage, it is necessary that the Plant Calendar is kept updated to reflect the latest status indicated by the production department.

You can create and maintain Plant Calendar for one or more years. If you create Plant Calendar for more than one year, then the period should be one block of contiguous years. With the closing of a year, you must ensure that Plant Calendar is added for the new year. It is suggested that at any point of time, you should maintain Plant Calendar for three years period consisting of current year, previous year and next year.

The screenshot displays the 'Calendar - Plant' application window. It features a menu bar with 'File', 'View', and 'Modify'. Below the menu is a toolbar with buttons for 'OK', 'Cancel', 'Save', 'Add', 'Delete', 'Go To...', 'Up', and 'Down'. A legend on the right side identifies color-coded status categories: Normal (black), Peak (pink), Shutdown (green), Holiday (blue), and Wk Off (red). The main area contains a grid of monthly calendars for the years 2000 and 2001. The months shown are Juillet, Août, Septembre, Octobre, Novembre, Décembre for 2000, and Janvier, Février, Mars for 2001. Each calendar shows the days of the week (L, M, M, J, V, S, D) and the dates. Some dates are highlighted in red, indicating they are 'Wk Off' (Work Off).

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 49 Date: 3 June 2002

#### Keys active in Calendar:

<b>&lt;Left Arrow&gt;</b>	:	Move cursor left on current row
<b>&lt;Right Arrow&gt;</b>	:	Move cursor right on current row
<b>&lt;Up Arrow&gt;</b>	:	Move cursor up on current column
<b>&lt;Down Arrow&gt;</b>	:	Move cursor down on current column
<b>SHIFT + &lt;Left Arrow&gt;</b>	:	Select the previous dates on a period
<b>SHIFT + &lt;Right Arrow&gt;</b>	:	Select the next dates on a period
<b>SHIFT + &lt;Up Arrow&gt;</b>	:	Select the previous weeks on a period
<b>SHIFT + &lt;Down Arrow&gt;</b>	:	Select the next weeks on a period

#### Buttons active in Calendar:

<b>OK, Cancel</b>	:	The same meaning as in all COSWIN windows
<b>Save</b>	:	Save the added or modified information
<b>Add</b>	:	Add years to the calendar
<b>Delete</b>	:	Delete years from the calendar
<b>Go To...</b>	:	Display a certain year
<b>Up</b>	:	Move 2 months backwards
<b>Down</b>	:	Move 2 months forward
<b>Normal</b>	:	Declare Normal production period
<b>Peak</b>	:	Declare Peak production period
<b>Shtdown</b>	:	Declare Shutdown period
<b>Holiday</b>	:	Declare Holiday period
<b>Wk Off</b>	:	Declare Weekly Off period

#### Menu options available in Calendar:

<b>File</b>	:	Save, Close or Cancel the calendar
<b>View</b>	:	Go to a certain year for being displayed
<b>Modify</b>	:	Modify the calendar: add and delete years; change the days types

#### 4.2.1.1 View Plant Calendar

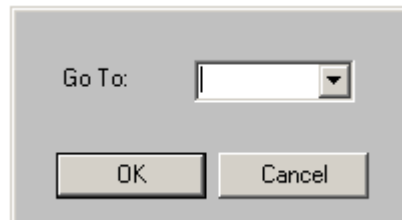
Using this option, you can view the Plant Calendar, 2, 3 or 6 months at a time (on a VGA display) or 9 months at a time (on a SVGA display). This maximum amount of months is obtained maximizing the window. System initially displays the calendar for current month (as indicated by the system date).

The cursor is placed inside the Calendar and you can use the various keys and buttons to move around the calendar.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 50 Date: 3 June 2002

Along with the Calendar, the system also displays the period (Exists From : XXXX To : XXXX) for which Calendar has been defined. However in view mode, you can view Calendar for any year between year 1950 to year 2049.

To display the calendar for a certain year press the **Go To...** button or choose the **Go To...** sub-option from the **View** option of the menu. The following window is displayed:

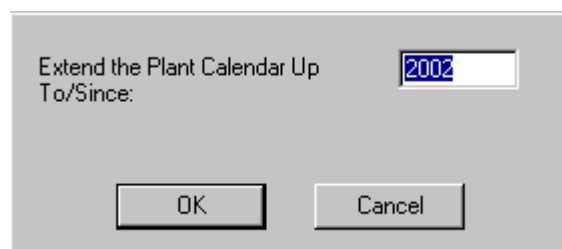


You must enter or select (from the combo-box) the desired year.

#### 4.2.1.2 Add Plant Calendar

This mode is available by pressing the **Add** button (from the right side of the window) or choosing the option **Modify** from the Calendar menu and then the sub-option **Add**.

In both cases, the following window is displayed, asking you the extension year.



Using **Add** mode, you can add Plant Calendar for one or more years. While adding, you must ensure that Plant Calendar is defined for one contiguous block of period. For example, if Calendar already exists from 1989 to 1997, adding Calendar for 1988 to 1988 or 1997 to 1998 is permitted while adding Calendar for year 1999 to 1999 or 1987 to 1987 is NOT permitted. System sets up Calendar by declaring Monday to Friday as normal production days and Saturday to Sunday as Weekly Offs. You can modify these declarations using **Modify** option.

#### 4.2.1.3 Modify Plant Calendar

You can change the following on Calendar:

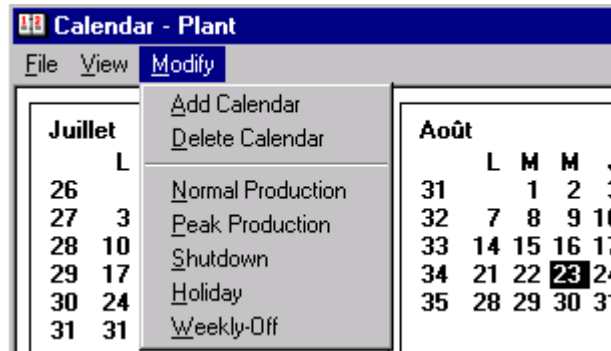
- Normal Production period
- Peak Production period
- Shutdown period
- Holidays period and
- Weekly Offs.



It may be noted that any changes made in Plant Calendar are NOT copied to existing Calendars for Equipment/Group.

The modifications made by default begin with the current date, but you may choose any other date to perform the changes on.

The **Modify** mode can be chosen either from the Calendar menu (choose Modify) and in this case we'll see the following window:



Alternatively, you may work directly with the buttons available on the right side of the main window.

Before making the changes, you must select the desired period. For doing this, position the cursor on the start day and then select the days of the period either by

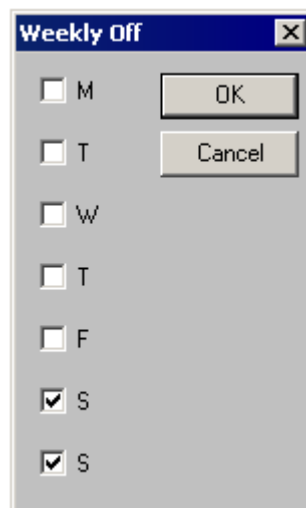
- Pressing simultaneously the SHIFT and <Left Arrow> or <Right Arrow> or <Up Arrow> or <Down Arrow> keys, until the whole period is selected, or
- Holding down the mouse left button, dragging the mouse on the whole period and then dropping the mouse on the final date.

The system updates the days for all the weeks between these two dates.

You are permitted to do the following changes:

### Weekly Off declaration

Choose **Weekly-Off** sub-option of the **Modify** option or press the **Wk Off** button. System displays a list of seven weekdays in a window on the screen.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 52 Date: 3 June 2002

You can mark the days to be declared as Weekly Offs by navigating from one field (day) to the other and pressing the **Space Bar** or by clicking with the mouse on that day. You can choose any number of days as Weekly Offs and these need not be continuous days. To unmark a day, press **Space Bar** or click on the day once more.

Once all the desired days have been properly marked, press the **OK** button to continue or (**ESC**) or the **Cancel** button to quit the changes.

### Holiday declaration

Choose **Holiday** sub-option of the **Modify** menu or press the **Holiday** button. The system marks all the dates between these two dates as holidays.

### Peak production declaration

Choose **Peak production** sub-option of the **Modify** menu or press the **Peak** button. The system marks all the dates between these two dates as holidays.

### Normal production declaration

Choose **Normal production** sub-option of the **Modify** menu or press the **Normal** button. The system marks all the dates between these two dates as normal production days.

### Shutdown declaration

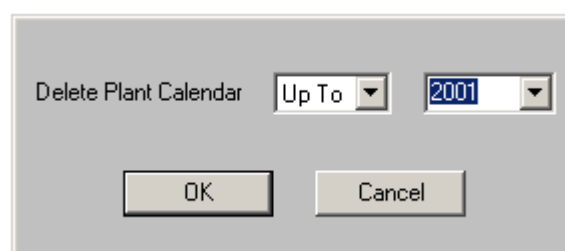
Choose **Shutdown** sub-option of the **Modify** menu or press the **Shutdown** button. The system marks all the days between these two dates as shutdown days.

### Delete Plant Calendar

Using **Delete** sub-option from the **Modify** menu or pressing the '**Delete**' button, you can delete Plant Calendar for one or more years. While deleting, you must ensure that Plant Calendar remains defined for a contiguous block of period.

In addition to the above checks, the system also ensures that the Plant Calendar is not deleted for any such year that is part of the **Mandatory Period**, as defined in Maintenance-Calendar Control.

When you invoke the **Delete** option, system displays a window:



There is 2 ways of deleting calendar, either with '**Up To**' option or '**Since**' option.

'**Up To**' option allows you to delete all calendar years not later than the specified year.

'**Since**' option allows you to delete all calendar year on and later than the specified year.

## 4.2.2 Defining BAR CODES

*Path:* Maintenance / Bar Codes

You can define the requirement of bar code option, the method of generation and method of printing for equipment's, employees and work orders.

**Bar Code:** This field contains 3 check boxes: 'For equipment', 'For employee' and 'For work order'. The first and the second boxes are checked by default and are disabled once defined. This means that bar codes are generated by default for equipment's and employees. You may check or clear only the third box i.e. if you want or not to generate bar code for Work Orders.

**Method of generation:** You may choose one of the methods 0, 1, or 2 by editing the corresponding combo-boxes for Equipment and Employee.

**Method of printing:** This is the option used to define the method of printing the bar code. The default method (you can't change it) is '1 Interleaved 2 of 5'.

**Equipment Bar code base No:** This number specifies the starting number for Equipment bar codes. This input is required if the option for Method of generation for equipment bar code is 1.

**Employee Bar code base No:** This number specifies the starting number for Employee bar codes. This input is required if the option for Method of generation for employee bar code is 1.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 54 Date: 3 June 2002

#### 4.2.2.1 Method of generating Bar codes

In order to generate the unique code, one of the following three methods is to be used.

**Method - 0:** Maintain the bar code same as the Equipment code or Employee code.

**Method - 1:** System generated serial number based on a given starting number. The serial number will be automatically incremented by 1 each time a new bar code to be issued.

**Method - 2:** System generated number devised from calculating date + time + station-ID.

## 4.2.3 Defining DEFAULT CODES

Path: Maintenance / Default Codes

Type	Code	Description
Day	D	Days
Week	W	Weeks
Zone	NEL	NEL
Function	NEL	Automatisation
Cost Center	5211110	OCS CC
Category	NEL	NEL
Remarks		Eqp Creation
Job Class C1	NEL	NEL
Action Kind	MAINT	Maint
Company Type	CMY	Company
Company Entity	NEL	NEL

OK Cancel

Some of the most frequently used parameters and other information are defined with a default value.

### Day

Specify the code and description of duration for day. For example, this will be used when defining duration in Job guidelines for Equipment. The code is a single character field and is normally the first alphabet of the description. *Once defined, subsequent modification of this parameter is not possible.*

### Week

Specify the code and description of duration for week. For example, this will be used when defining duration in Job guidelines for Equipment. The code is a single character field and is always the first alphabet of the description. *Once defined, subsequent modification of this parameter is not possible.*

### Zone

Specify the default zone. The default zone code will be prompted wherever relevant particularly during establishing Topographical details of equipment.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 56 Date: 3 June 2002

If the specified zone code already exists in the zone directory, the zone description will be automatically displayed and you may modify the description. If the zone code does not present in the zone directory, an entry will be automatically created.

### **Function**

Specify the default function. The default function code will be prompted wherever relevant particularly during establishing Topographical details of equipment.

If the specified function code already exists in the function directory, the function description will be automatically displayed and you may modify the description. If the function code does not present in function directory, an entry will be automatically created.

### **Cost Centre**

Specify the default cost centre. The default cost centre code will be prompted wherever relevant particularly during establishing Topographical details of equipment.

If the specified cost centre code already exists in the cost centre directory, the cost centre description will be automatically displayed and you may modify the description. If the code does not present in cost centre directory, an entry will be automatically created.

### **Category**

Specify the default category. If the specified category code already exists in the category directory, the category description will be automatically displayed and you may modify the description. If the category code does not present in category directory, an entry will be automatically created.

### **Remarks**

Specify the default remarks line that will be used in creating default "movement records" of the Equipment when establishing Topographical details for the first time.

### **Job Class**

Specify the default job class. The default job class code will be prompted wherever relevant particularly during work order feedback. If the job class code already exists in the job class directory, the job class description will be automatically displayed and you may modify the description. If the code does not present in job class directory, an entry will be automatically created.

## 4.2.4 Defining RATE HEADINGS

*Path:* Maintenance / Rate Headings

Code	Description
1	Std rate
2	Night rate
3	W-E rates
4	Rates- 4
5	Rates- 5
6	Rates- 6
7	Rates - 7
8	Rates - 8
9	Rates- 9

OK Cancel

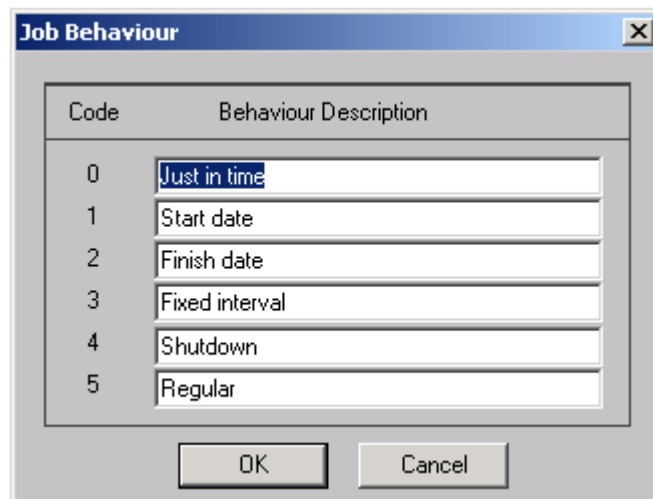
This option allows you to define up to 9 different types of pay rate for employee.

## 4.2.5 Defining JOB BEHAVIOUR

*Path:* Maintenance / Job / Behaviour

This option allows you to specify the descriptions for the various behaviours of jobs. The meaning and context of the behaviours will remain regardless of the descriptions given.

Refer to the section on Planned Maintenance for detailed understanding of each behaviour.



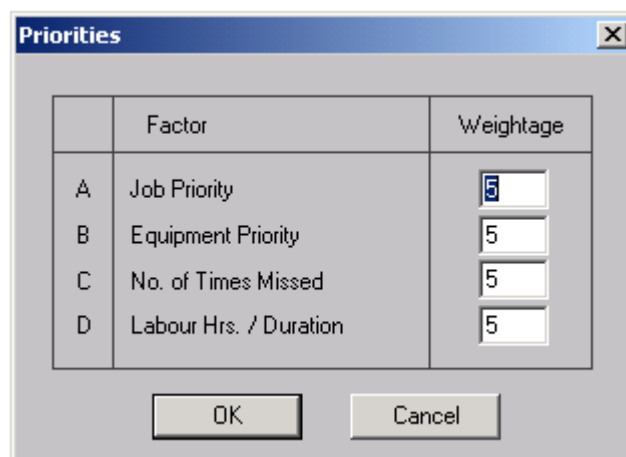
The 'Job Behaviour' dialog box contains a table with two columns: 'Code' and 'Behaviour Description'. The table lists six behaviours with their corresponding codes. The 'Just in time' behaviour (code 0) is currently selected and highlighted in blue. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Code	Behaviour Description
0	Just in time
1	Start date
2	Finish date
3	Fixed interval
4	Shutdown
5	Regular

## 4.2.6 Defining JOB PRIORITIES

*Path:* Maintenance / Job / Priorities

This option defines the default weightage given to each of the four factors used in computing the priority during job planning.



The 'Priorities' dialog box contains a table with three columns: 'Factor', 'Weightage', and an unlabeled column for the factor code. The table lists four factors: Job Priority (A), Equipment Priority (B), No. of Times Missed (C), and Labour Hrs. / Duration (D). Each factor has a weightage of 5. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

	Factor	Weightage
A	Job Priority	5
B	Equipment Priority	5
C	No. of Times Missed	5
D	Labour Hrs. / Duration	5



## 4.2.7 Defining JOB TYPE

*Path:* Maintenance / Job / Type

Job Type indicates whether the job is a breakdown Job, preventive maintenance, mandatory job and so on.

Job Type	Job Type Description	Pty.	Bhv.	
ACC	Accident	5	0	
CBM	Condition Based Mt	5	0	
CM	Corrective Maint	5	0	
PM	Preventive Maint	5	1	
SRM	Safety Related Mod	5	0	
TI	Tech Investi/Trials	5	0	

### Job type

This code uniquely identifies the Job Type.

### Job Type Description

This is the description of the job type.

### Pty

This is the default job Priority associated with the Job type.

### Bhv

This is the behaviour code associated with the Job-type.

Use the **Add** button to define new job type. You can define up to 25 job types.

Use the **Modify** button to modify an existing job type. Job type code once defined cannot be modified.

Deletion of existing job types is not allowed.

The associated priority and behaviour code will be used as default values when you choose a Job-type for a Job. Modifying default priority and default behaviour will not have any effect on the existing jobs using that Job type.

#### 4.2.8 Defining JOB CLASS

*Path:* Maintenance / Job / Class

The Job Class indicates the nature of Job carried out after a work order has been completed. This can be used effectively to classify and analyse the various work orders and the cost of maintenance. Examples of Job classes are Lubrication, Replacement, Inspection, etc.

Code	Description
INSP	Inspection
LUB	Lubrication
REPL	Replacement

## Job class

This code uniquely identifies the Job class.

### Job-class description

This is the description of the job class.

Use the **Add** button to define new job class. You can define up to 25 Job classes.

Use the **Modify** button to modify an existing job class. Job class code once defined cannot be modified.

Deletion of existing Job Classes is not allowed.

## 4.2.9 Defining JOB IDENTIFIERS

*Path:* Maintenance / Job Identifiers

Job Prefix	Job Suffix
NET	1
AUTO	2

In this option you will define the prefixes and suffixes of the various job identifiers that are to be generated from Job Guidelines module using 'AUTO GENERATE' option.

### 4.2.9.1 Adding Job Identifiers

Press the **Add** button from the main window and the following window appears:

You may enter a 4 characters string representing the **Job prefix**.

You are then expected to introduce a number of at most 6 digits for the **Job Suffix**. This will be the starting number of the job when it is generated automatically with the corresponding prefix.

For example, if you enter the prefix UPLN and the suffix 1, COSWIN will scan the jobs directory for jobs with same prefix. If, for example, these jobs identifiers are found:

UPLN000088, UPLN000081, UPLN000009.

Then COSWIN will propose 89 as the suffix value.

If you press Enter in the suffix field, the first available number is displayed and consequently saved in the database.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 62 Date: 3 June 2002

NOTE: If in Job Guidelines, WO Details or Job Request module that a job identifier such as UPLN000200 has been created manually or automatically, the suffix corresponding to the prefix UPLN defined in **Maintenance/Job Identifiers** will be updated accordingly. That is, it will be 201.

#### 4.2.9.2 Deleting Job Identifiers

You may do this by selecting the identifier code to be deleted and press the **Delete** button from the main window.

#### 4.2.10 Defining WORK ORDER TYPE

*Path: Maintenance / Work Order / Type*

Type	Description
P	Planned
U	Unplanned
O	Others

OK Cancel

You can have three types of Work orders, namely

P – Planned

U – Unplanned

O – Others

You may define your own code and descriptions but the meaning and context will be retained as above and in that order.

*Once defined, subsequent modification of the code of WO Type is not possible.*

## 4.2.11 Defining WORK ORDER STATUS

*Path:* Maintenance / Work Order / Status

Status	Description	Syst. Code
0	Not Started	0
1	In progress	1
2	Finished	2
3	Archivable	3
W	Waiting for spares	1
X	Canceled	3

In this option, you will define all the status that a Work orders can have.

### Status

The user defined status for work order. It is a single character code and can have any alphanumeric value.

### Description

This is the Description of the status. For example, status 'A' could have description as 'Archive'. Status 'N' could have description as 'Not Started' and so on. You may also have a status to indicate 'Held-up due to resources' etc.

### System Code

This is a single digit number that identifies one of the four stages of the Work order status:

- 0 – Not started
- 1 – In progress
- 2 – Completed (awaiting Feedback)
- 3 – To Archive (Feedback over)

Each user-defined status must correspond to one of the four system codes.

You may define up to 36 status codes for Work orders.

Once added, you are permitted to modify only the Description.

Deletion of existing WO Status Codes is not allowed.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 64 Date: 3 June 2002

## 4.2.12 Defining WORK ORDER PRINT OPTIONS

*Path:* Maintenance / Work Order / Print Options

In this option you will define the default options to be selected when printing Work orders. Please note that users are still able to modify any of the options proposed during work order printing.

### WO bar code

This checkbox, if checked, indicates to print the bar codes for the work orders. This option can be chosen only if the bar code option for Work order is checked in Bar-Code-Parameters.

Based on the method of printing you have chosen, the bar codes will be printed on the Work orders.

### Planned Hours

This checkbox, if checked, indicates that the planned hours of the job to be printed on the work order.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 65 Date: 3 June 2002

### **Job Activities**

This checkbox, if checked, indicates that the Job Activities defined in job guideline of the work order's equipment job to be printed on the work order.

### **Specific text**

This checkbox, if checked, indicates that the Specific Text defined in job guidelines of the work order's equipment job to be printed on the work order.

### **Notes**

This checkbox, if checked, indicates that the Feedback Notes specified in the Work Order Details module to be printed on the work order.

### **Equipment Remarks**

This checkbox, if checked, indicates that the remarks defined for the work order's equipment to be printed on the work order.

### **Do's and Don'ts**

This checkbox, if checked, indicates that the Do's and Don'ts defined for the work order's equipment to be printed on the work order.

### **Resource Requirements**

This checkbox, if checked, indicates that the Resource Requirements defined in job guidelines of the work order's equipment job to be printed on the work order.

### **Stock Requirements**

This checkbox, if checked, indicates that the Stock Requirements defined in job guidelines of the work order's equipment job to be printed on the work order.

### **Print Actions**

This checkbox, if checked, indicates that the Actions defined in job guidelines of the work order's equipment job to be printed on the work order.

### **Print Allocated Employees**

This checkbox, if checked, indicates that the list of the employee allocated to the work order to be printed on the work order.

### **Print Facility Requirement**

This checkbox, if checked, indicates that the Facility Requirements defined in job guidelines of the work order's equipment job to be printed on the work order.

### **Print group of Equipments**

This checkbox, if checked, indicates that the list of equipments belonging to the equipment group (if the work order is to work on an equipment group) to be printed on the work order.

## 4.2.13 Defining WORK ORDER PARAMETERS

*Path:* Maintenance / Work Order / Parameters

In this option you will define the options that determine the behaviour of the Work orders.

### Split WO Notes

This checkbox, if checked, will configure the feedback note tab of the Work Order Details into 2 sections. The left section allows users to enter new feedback. The right section displays the feedback made by the user and forbids any modification to the feedback provided.

If this checkbox is unchecked, then the feedback note tab of Work Order Details module will only has one section and users is able to add and modify the content in the tab.

### Warranty Management

This checkbox, if checked, indicates that the Warranty Management in COSWIN will be activated.

### Skip Subcontracted Jobs

This checkbox determines if the sub-contracted job is to be skipped during work order creation.

It is the default value of the **Skip Subcontracted Jobs** option in the various COSWIN modules like Work Order Details, Release Planned Jobs, and Planner Review.

### Check Skills

This checkbox determines if the skills of the employees allocated to the work order is to be verified against the specified skills requirement.

It is the default value of the **Check Skills** option in the various COSWIN modules like Work Order Details, Release Planned Jobs, and Planner Review.

### Allocate Employees

This checkbox determines if employee is to be automatically allocated by system during work order creation.

It is the default value of the **Allocate Employees** option in the various COSWIN modules like Work Order Details, Release Planned Jobs, and Planner Review.



### Restrict Feedback

This checkbox, if checked, will display a warning message and allow rejection when an allocated employee with rejected status tries to provide time feedback to the work order.

### Reserve Items in Planning

This checkbox determines if stock items requested by equipment jobs are to be reserved automatically by system during planning.

It is the default value of the **Reserve Items** option in the Release Planned Jobs module.

### Remind Interval

This field denotes the numbers of days after the warranty for equipment has expired that system will still display warning message about equipment warranty expiry when releasing jobs.

## 4.2.14 Defining DEPRECIATION

*Path:* Maintenance / Depreciation

In this option, you can specify the co-efficient rate used to compute depreciation for equipment at different periods.

From Life	To Life	Rate Coeff.
	2	1.50
3	5	3.50
6	9	8.50
10		9.00

Last dep. date:

### 4.2.14.1 Add/Modify Periods and Co-efficient

A maximum of five co-efficient rates can be defined, one for each rows.

In each row, the From Life and To Life values specify a period within which the co-efficient value will be used for calculating the depreciation rate.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 68 Date: 3 June 2002

### From Life

This data item specifies the beginning year of the period. The first row value is always 0. The **From Life** value in the table will always be one year greater than the previous row's **To Life** value.

### To Life

This data item specifies the ending year of the period. If you leave this field as blank, it is assumed that the co-efficient value that you enter at this row is for the period starting from the **From Life** and onwards. This field must be greater than zero, must be greater than the **From Life** value, and must be blank if it is at the last row of the table.

### Co-efficient Value

This data item specifies the co-efficient value for the given period in **From Life** and **To Life** fields. This field must be greater than zero, must be less than the value in **To Life** field if **To Life** field is not blank, and must be less than the value in **From Life** field if **To Life** field is blank.

When you modify the depreciation parameters, you will be asked whether you want to save the modifications. If agreed, the equipment's depreciation data will be adjusted with the new parameters.

## 4.2.15 Defining CALENDAR CONTROL

*Path:* Maintenance / Calendar Control

This option is used to extend, reduce or even define a new calendar period for

- All equipment's for which calendars has already been defined
- All employees

Calendar Records Control		
Maintain Data From Year: <input style="width: 50px;" type="text" value="1999"/> To: <input style="width: 50px;" type="text" value="2001"/>		
Record Type	Total	Scanned
Function	<input style="width: 50px;" type="text" value="1"/>	<input style="width: 50px;" type="text"/>
Zone	<input style="width: 50px;" type="text" value="1"/>	<input style="width: 50px;" type="text"/>
Equipments	<input style="width: 50px;" type="text" value="0"/>	<input style="width: 50px;" type="text"/>
Resources	<input style="width: 50px;" type="text" value="0"/>	<input style="width: 50px;" type="text"/>
Employees	<input style="width: 50px;" type="text" value="0"/>	<input style="width: 50px;" type="text"/>
Heading	Legend	
Normal Production	<input style="width: 50px;" type="text" value="N"/>	
Peak Production	<input style="width: 50px;" type="text" value="P"/>	
Shutdown	<input style="width: 50px;" type="text" value="S"/>	
Weekly Off	<input style="width: 50px;" type="text" value="W"/>	
Holiday	<input style="width: 50px;" type="text" value="H"/>	
<input style="width: 60px;" type="button" value="OK"/> <input style="width: 60px;" type="button" value="Cancel"/>		

As a prerequisite, plant calendar must exist for the period for which calendar data should be maintained for equipment's and employees.

It also creates and deletes records used in the Resource Availability module.

The From Year and To Year represent the beginning and the ending year of the mandatory period.

### **Mandatory Period**

The period that you specify for calendar creation is known as Mandatory Period. It is the period for which planning can be carried out.

The mandatory period can be modified to add new calendars and delete old ones. On modifying this period, the system deletes the calendar that exists in the previous mandatory period but not in the current period, retains the calendar that lies in both the previous and the current mandatory periods and adds new calendar for the additional period.

This module also defines the indicators for the type of day used in Release Jobs module for

- Normal Production Days
- Peak Production Days
- Shutdown Days
- Weekly Offs
- Holidays

## 4.2.16 Defining ANALYSES CONTROL

*Path:* Maintenance / Analyses Control

Using this option, you can define a period in years for which analysis data needs to be maintained. COSWIN builds up analysis data at Annual Level for the following entities:

Zone, Function, Cost Centre, Budget Centre, Equipment/Group, Contract.

Following details are maintained at annual level and to-date level according to Planned, Unplanned and Other work orders:

Actual Labour Cost, Actual Material Cost, Actual Miscellaneous Cost, No. of work orders, Down Time (in Hours), Production Loss (in Hours), Planned Hours, Actual Hours.

Record Type	Total	Scanned
Zones	1	0
Functions	1	0
Cost Centres	2	0
Budget Centres	0	0
Equipments	0	0
Sub-Contracts	0	0

When you define the period of your interest, the system sets up blank analysis records for each of the entities described above. Analysis data is accumulated in these records when you archive work orders from Work In Progress to History. Therefore it is necessary that before you archive work orders, you should set up analysis records using this option for the appropriate period. In addition at the closing of year, you must revise the period (From Year/To Year) using this option.

Unlike many other parameters, setting of analysis control parameter is not mandatory, Analysis control parameter can be set at the time of installation and can be modified from time to time to change the analysis period.

If the analysis period is defined for the second time or anytime after that, previous period analysis data are dumped into an ASCII file for future reference and deleted from the database. The ASCII files are created in COSWIN\ANALYSIS directory of the current drive. If no such directory exists in the current disk drive, the directory is created and then the following files are created in the directory:

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 71 Date: 3 June 2002

Name of file	Type of analysis data
zone_ana.dat	Zone related data
func_ana.dat	Function related data
cost_ana.dat	Cost Centre related data
budc_ana.dat	Budget Centre related data
eqpt_ana.dat	Equipment related data
scont_ana.dat	Contract related data

The From Year and To Year represent the beginning and ending year of the analysis period.  
The Current Year represents the current year and must be within the analysis period.

The First Month field is for display purpose only. The value represents the First Month of the Financial Year as specified in GLOBAL/General Parameters.

The system also displays the total number of Zones, Functions, Equipment's, Cost Centres, Budget Centres and Sub-Contracts existing in the system.

## 4.2.17 Defining JOB REQUEST

*Path:* Maintenance / Job Request

### Default Job Request Prefix

Specify the prefix (maximum 4 alphanumeric characters) to be used when a job request reference is auto-generated by the system.

### Last Job Request srl. No.

Specify the running serial number to start with, when a job request reference number is auto-generated. The Last Job Request serial number once used cannot be modified subsequently.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 72 Date: 3 June 2002

## 4.2.18 Defining ACTIONS

*Path:* Maintenance / Actions

### Default Action Prefix

Specify the prefix (maximum 4 alphanumeric characters) to be used when an action reference is auto-generated by the system.

### Last Action srl. No.

Specify the running serial number to start with, when an action reference number is auto-generated. The Last Action serial number once used cannot be modified subsequently.

## 4.2.19 Defining HAZARD MONITORING

*Path:* Maintenance / Hazard Monitoring

### Code prefix

Specify the prefix (maximum 4 alphanumeric characters) to be used when a hazard report reference is auto-generated by the system.

### Code suffix.

Specify the running serial number to start with, when a hazard report reference number is auto-generated.

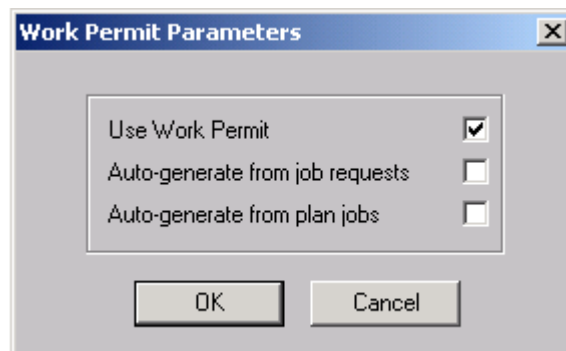
Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 73 Date: 3 June 2002

### Disable Automatic Closure

If selected, COSWIN will not automatically close the hazard report if its follow-up work order or job request closes. The code suffix once used cannot be modified subsequently.

## 4.2.20 Defining WORK PERMIT GENERAL PARAMETER

*Path:* Maintenance / Work Permit / General Parameter



### Use Work Permit

If selected, COSWIN will activate the Work Permit module.

### Auto-generate from job requests

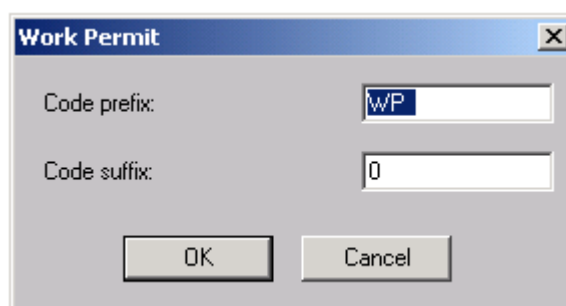
If selected, COSWIN will automatically generate a work permit from job request if the job request involves an equipment that requires work permit.

### Auto-generate from plan jobs

If selected, COSWIN will automatically generate a work permit from planning if the job involves an equipment that requires work permit.

## 4.2.21 Defining WORK PERMIT CODE GENERATION

*Path:* Maintenance / Work Permit / Code Generation



### Code prefix

Specify the prefix (maximum 4 alphanumeric characters) to be used when a work permit reference is auto-generated by the system.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 74 Date: 3 June 2002

### Code suffix.

Specify the running serial number to start with, when a work permit reference number is auto-generated. The code suffix once used cannot be modified subsequently.

## 4.2.22 Defining ROSTER

*Path:* Maintenance / Roster

### Prefix for Roster

Specify the prefix (maximum 4 alphanumeric characters) to be used when a roster reference is auto-generated by the system.

### Last Roster srl no

Specify the running serial number to start with, when a roster reference number is auto-generated. The serial number once used cannot be modified subsequently.

### Day-off shift

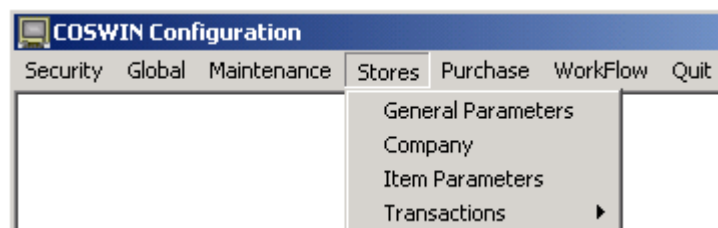
Specify the code and description for the day-off shift.

### Use Default shift management

Default shift management refers to the managing of employee without creating a Roster List.

If checked, indicate that the system will not require a Roster list to allocate employee to work order.

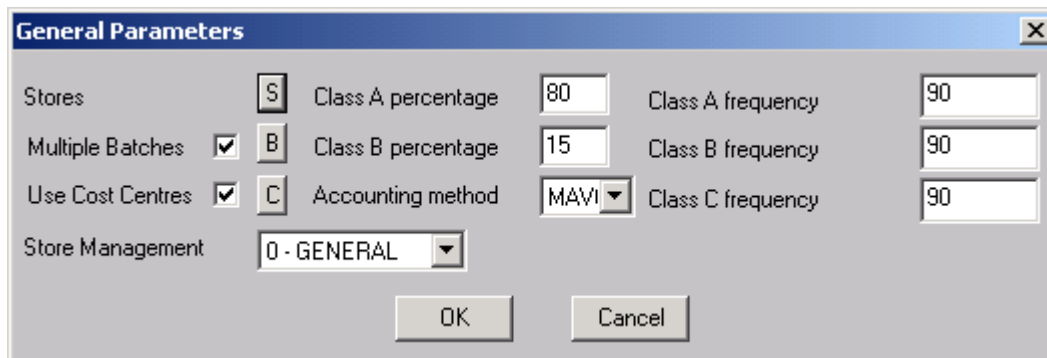
## 4.3 STORE PARAMETERS





### 4.3.1 Defining GENERAL PARAMETERS

Path: Store / General Parameters



The 'General Parameters' dialog box contains the following fields and controls:

- Stores:** A button labeled 'S'.
- Multiple Batches:** A checked checkbox and a button labeled 'B'.
- Use Cost Centres:** A checked checkbox and a button labeled 'C'.
- Store Management:** A dropdown menu showing '0 - GENERAL'.
- Class A percentage:** A text box with the value '80'.
- Class B percentage:** A text box with the value '15'.
- Accounting method:** A dropdown menu showing 'MAVI'.
- Class A frequency:** A text box with the value '90'.
- Class B frequency:** A text box with the value '90'.
- Class C frequency:** A text box with the value '90'.
- Buttons:** 'OK' and 'Cancel' at the bottom.

#### Stores

By default Multiple Stores exist.

Pressing the **S** button besides the Stores option, a window is displayed to define the default store and its description.



The 'Default Stores' dialog box contains the following fields and controls:

- Default Store code:** A text box with the value 'SDS'.
- Store name:** A text box with the value 'SDS'.
- Buttons:** 'OK' and 'Cancel' at the bottom.

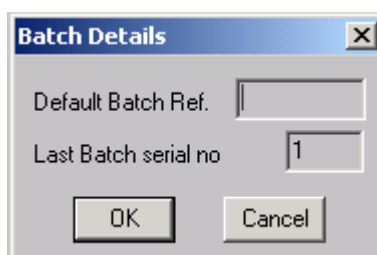
This is to specify a default store and its description. When creating a new stock item, system will propose this default store as the main store for the item.

Selection list facility is available on **Default store code** field by pressing the **F2** key. If there is no store defined in the database, it is mandatory to add one, by pressing the **ADD** button within the selection list window.

#### Multiple Batches

If selected, it will be possible to have multiple batches for stock items. *Once updated, subsequent modification of this parameter is not possible.*

Pressing the **B** button besides the Multiple Batches, a window is displayed to define the batches reference number:



The 'Batch Details' dialog box contains the following fields and controls:

- Default Batch Ref.:** A text box.
- Last Batch serial no:** A text box with the value '1'.
- Buttons:** 'OK' and 'Cancel' at the bottom.

You can only enter information in the **Default Batch Ref** field if **Multiple Batches** checkbox is not selected. Both values once updated, cannot be modified subsequently.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 76 Date: 3 June 2002

## Use Cost Centres

This option allows you to define whether you will have the Cost Centre database. If you don't select the check box, nowhere in the stock and purchase module will you be asked for Cost Centres. Thus you cannot have Cost Centre facility in Purchase Orders, Invoices, Demands, Issues, etc. *Once updated, subsequent modification of this parameter is not possible.*

Pressing the **C** button besides the Cost Centres option, a window is displayed to define some default cost centre codes:

Both the Default Cost Centre and Suspense Cost Centre are mandatory. When creating a new Stock Item, system will propose this Default Cost Centre as the cost centre for the stock item.

Selection lists facility is available on these fields by pressing **F2** key. Or, you can create the new Cost Centres by pressing the **ADD** button within the selection list window.

## Add consumption details

Select the check box to indicate manual input of monthly consumption details for the Cost Centre.

## Cost decimal digits

You can specify the number of digits to be displayed and processed after the decimal point. You can select the number by using the combo box.

## Store management

Two options are available, namely, 0 – GENERAL, 1 – INDIVIDUAL. The '0 – GENERAL' implies that the accounting method MAVG selected will apply to the entire database whereas the option '1 – INDIVIDUAL' implies the method will apply at individual store level.

## Class A percentage

This field indicates the Class A threshold percentage for the classification of items in ABC analysis.

## Class B percentage

This field indicates the Class B threshold percentage for the classification of items in ABC analysis. The sum of Class A and Class B percentage values must be less than or equal to 100.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 77 Date: 3 June 2002

### Accounting method

This field defines the default accounting method for the installation. The available options are:

- LIFO: Last in first out
- FIFO: First in first out
- MAVG: Moving average
- SRAT: Standard rate
- LAST: Last rate

*Once updated, subsequent modification of this parameter is not possible.*

### Class A frequency

This indicates how often in terms of day, that the Class A stock be counted. It is the default value proposed when new item are created.

### Class B frequency

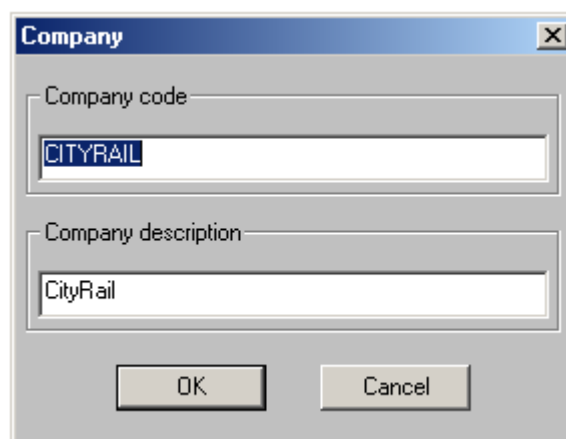
This indicates how often in terms of day, that the Class B stock be counted. It is the default value proposed when new item are created.

### Class C frequency

This indicates how often in terms of day, that the Class C stock be counted. It is the default value proposed when new item are created.

## 4.3.2 Defining COMPANY

*Path: Store / Company*



The screenshot shows a standard Windows-style dialog box titled 'Company'. It has two text input fields. The first field, labeled 'Company code', contains the text 'CITYRAIL'. The second field, labeled 'Company description', contains the text 'CityRail'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

This represents the company for which the COSWIN installation is used. This field is used when COSWIN trigger the automatic receipts to move the repairable items into store. COSWIN uses the company code as the supplier of such receipt.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 78 Date: 3 June 2002

### 4.3.3 Defining ITEM PARAMETERS

*Path:* Store / Items / Parameters

The 'Items' dialog box contains the following parameters:

- Use Item Groups: ☒
- Allow Reservation: ☒
- Inspect Items: ☐
- Whether Imported: ☐
- Whether Insured: ☐
- Change Suppliers: ☒
- Adjustm. while adding: ☒
- Use Bar codes for items: ☒ B
- Use Plan Ahead Days: ☐ 20
- Quantity Digits: 3

Buttons: OK, Cancel

#### Use item Groups

Select this checkbox if items to be classified into groups. *Once updated, subsequent modification of this parameter is not possible.*

#### Allow Reservation

This checkbox determines if the item can be reserved automatically upon release of the work orders requiring the items. Leaving the checkbox unselected implies that the item cannot be reserved automatically.

It is the default value of the **Auto reserve?** option in the Item Group details module proposed by system during creation of new item group.

#### Inspect Items

This checkbox determines if the stock item requires inspection upon receipt from suppliers.

It is the default value of the **Inspect?** option in the Item Group details module proposed by system during creation of new item group.

#### Whether Imported

This checkbox determines if the stock items are imported items by default.

It is the default value proposed to the **Imported Item?** option of the Attribute tab of the Item Generalities module when new stock item is created.

#### Whether Insured

This checkbox determines if the stock items are covered under insurances by default.

It is the default value proposed to the **Insured?** option of the Attribute tab of the Item Generalities module when new stock item is created.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 79 Date: 3 June 2002

## Change Suppliers

This checkbox determines if the supplier for the item can be changed.

It is the default value proposed to the **Change supplier?** option of the Attribute tab of the Item Generalities module when new stock item is created.

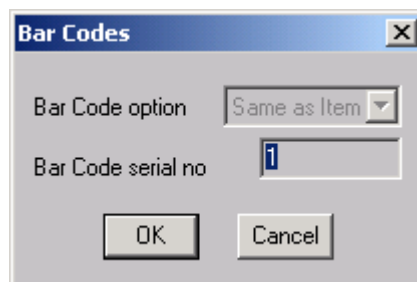
## Adjustm. while adding

Select this check box if an adjustment record is to be created while adding a stock item. Otherwise, leave it unchecked. *Once update, subsequent modification of this parameter is not possible.*

## Use Bar codes for items

Select this checkbox if you want to use the bar code facility for stock items. *Once updated, subsequent modification of this parameter is possible.*

By pressing the **B** button besides the field, a window will be displayed as shown below.



**Bar Code option:** You can select the type of bar code to be generated by COSWIN for each stock item. By default, it is set on type **Serial no** (serial number).

**Bar Code serial no:** This is a field that can be accessed only if the value for the above field is **Serial no**. By default it is set to 1. You can change it if you wish.

*Once updated, both fields cannot be modified subsequently.*

## Use Plan Ahead Days

The checkbox indicates if the Plan Ahead Days is to be used, and the text field indicates the number of Plan Ahead Days. However, both fields are purely informative. The number of Plan Ahead Days defined here is proposed as default value for the **Plan Ahead** field in More tab of Stock Register module during stock item creation.

*Once updated, both fields cannot be modified subsequently.*

## Quantity Digits

Specifies the number of digits to be displayed after the decimal point for stock item quantities. The input here should be a number in the range from 0 to 6.

It is the default value proposed to the **Qty digits** field in Details tab of Stock Register module during creation of consumable and non-consumable stock items.

#### 4.3.4 Defining ITEMS VAT

*Path:* Store / Items / VAT

Code	Description
0	3.0 %
1	
2	
3	
4	
5	
6	
7	
8	
9	

OK Cancel

This window allows user to define up to 10 VAT rates. These rates will be selectable at the **VAT** field in the More tab of Stock Register module.

#### 4.3.5 Defining STOCK DEMANDS

*Path:* Store / Transactions / Demands

Default Demand prefix: DEM

Last Demand serial no: 1

☐ Need Validation

OK Cancel

##### Default Demand prefix

Specify the prefix to be used when a demand reference is autogenerated by the system. Entry of this field is optional.

##### Last Demand serial no.

Specify the running serial no. to start with, when a demand is autogenerated.

##### Need Validation

If selected, all stock demands must be validated before issues can be made against it.

### 4.3.6 Defining STOCK ISSUES

Path: Store / Transactions / Issues

#### Default Issue prefix

Specify the prefix to be used when an issue reference is auto-generated by the system.

#### Last Issue serial no

Specify the serial number to start with, when an issue is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*

#### Default Return prefix

Specify the prefix to be used when a return on a stock issue is auto-generated by the system.

#### Last Return serial no

Specify the serial number to start with when a return reference on a stock issue is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*

#### Averaging method:

Available options are 'PMP' and 'Weight Factor'.

Specify a 'PMP' to use the weighted average method to calculate the last average issue price and last average issue quantity.

Specify a 'Weight Factor' to use the ratio based method to calculate last average issue price and last average issue quantity.

#### Old avg. weight factor

This option is only enabled for Averaging method = "Weight Factor". It is the weight factor to be used in the computation.

#### Create Issue from Work Order

If checked, it is possible to automatically issue stock from the Work Order Details module using the **ISSUE WO** non-standard button.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 82 Date: 3 June 2002

### 4.3.7 Defining STOCK RECEIPTS

Path: Store / Transactions / Receipts

#### Default Delivery Note prefix

Specify the prefix to be used when a delivery note reference is auto-generated by the system.

#### Last Delivery Note srl no

Specify the serial number to start with, when a delivery note reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*

#### Last Inspection srl no

Specify the serial number to start with, when an Inspection reference is auto-generated by system. *Once updated, subsequent modification of this parameter is not possible.*

#### Default GRN prefix

Specify the prefix to be used when a GRN reference is auto-generated by the system.

#### Last GRN srl no

Specify the serial number to start with, when a GRN reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 83 Date: 3 June 2002

### Averaging method

Available options are '**PMP**' and '**Weight Factor**'.

Select '**PMP**' to use the weighted average method to calculate the last average issue price and last average issue quantity.

Select '**Weight Factor**' to use the ratio based average method to calculate the last average issue price and last average issue quantity.

### Receipt averaging factor

This option is only enabled for Averaging method = "Weight Factor". It is the weight factor to be used in the computation.

### Reject value(%)

This is the percentage of rejected value/quantity upon total received value/quantity, beyond which the rejection count of the supplier will be incremented by one.

### Compute Receipt Value:

Select the check box if the receipt value for a stock item is to be calculated automatically by the system. If unselected, the receipt value for a stock item has to be entered manually.

### Default RET prefix

Specify the prefix to be used when a return reference on a receipt is auto-generated by the system.

### Last RET srl no

Specify the serial number to start with, when a return reference on a receipt is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*

### Use Main Store

This checkbox, if checked, will make the main store defined in the respective Stock Register as the preferred store for stock issue and receipt.

### Copy Header Free Fields

If selected, COSWIN will copy the content of the free fields saved at the header level of Purchase Order module to that of the Stock Receipt when Stock Receipt is made against a Purchase Order.

### Copy Item Line Free Fields

If selected, COSWIN will copy the content of the free fields saved at the item details level of Purchase Order module to that of the Stock Receipt when Stock Receipt is made against a Purchase Order.

### Auto Add Batch

This checkbox, if checked, will automatically create a new batch for each stock receipt.

### Validate all item

This checkbox, if checked, will consider all items in stock receipt automatically validated. Otherwise, user will need to validate each item specifically by checking the Validate checkbox in Stock Receipt Item Details window.

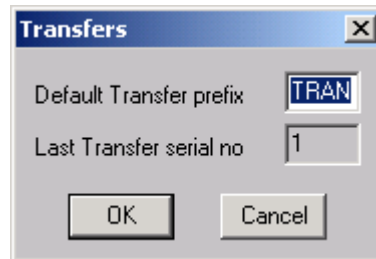
### Use order quantity

This checkbox, if checked, will propose the quantity state in Purchase Order as the received quantity during stock receipt.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 84 Date: 3 June 2002

### 4.3.8 Defining STOCK TRANSFERS

*Path:* Store / Transactions / Transfers



#### **Default Transfer prefix**

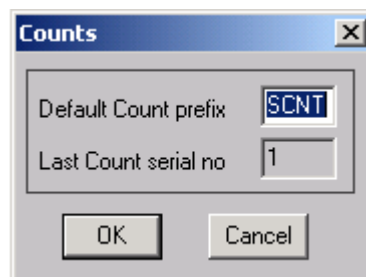
Specify the prefix (maximum 4 alphanumeric characters) to be used when a transfer reference is auto-generated by the system.

#### **Last Transfer serial no**

Specify the serial number to start with, when a transfer reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*

### 4.3.9 Defining STOCK COUNTS

*Path:* Store / Transactions / Counts



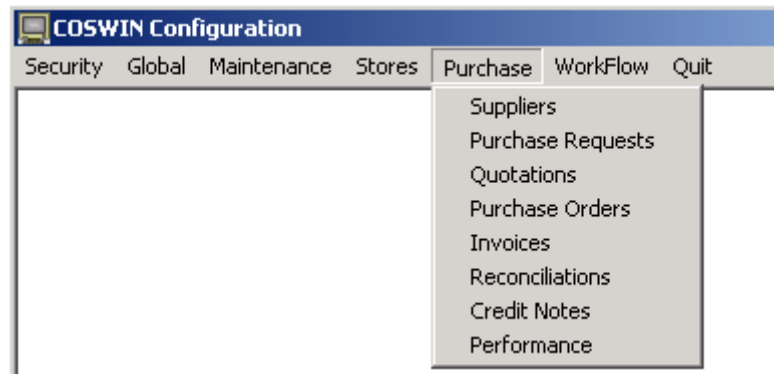
#### **Default Count prefix**

Specify the prefix (maximum 4 alphanumeric characters) to be used when a stock count reference is auto-generated by the system.

#### **Last Count serial no**

Specify the serial number to start with, when a stock count reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is not possible.*

## 4.4 PURCHASE PARAMETERS



### 4.4.1 Defining SUPPLIERS

*Path:* Purchase / Suppliers

The 'Supply Delays' dialog box contains input fields for early and late delivery counts. The 'Early' section has two fields: 'Early - 1' with a value of 15 and 'Early - 2' with a value of 30. The 'Late' section has four fields: 'Late - 1' (15), 'Late - 2' (30), 'Late - 3' (45), and 'Late - 4' (60). At the bottom are 'OK' and 'Cancel' buttons.

Category	Field	Value
Early	Early - 1	15
	Early - 2	30
Late	Late - 1	15
	Late - 2	30
	Late - 3	45
	Late - 4	60

#### Early:

You can specify two different early counts, Early - 1 and Early - 2.

Example, Early - 1 can be 10 days in duration and Early - 2 can be 20 days.

If the delivery is made before schedule, either Early - 1 or Early - 2 count is incremented depending on how many days before the scheduled date the delivery was made.

#### Late

You can specify four different late counts: Late - 1, Late - 2, Late - 3 and Late - 4.

Example Late - 1 is 15 days in duration, Late - 2 is 30 days in duration,

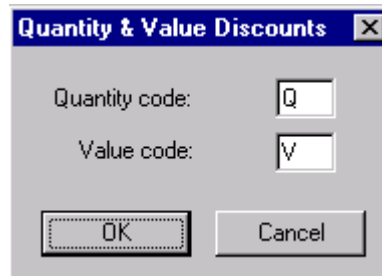
Late - 3 is 45 days in duration, and Late - 4 is 60 days and more.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 86 Date: 3 June 2002

If the delivery is made after the scheduled date, one of the four late counts is incremented depending on the number of days after the scheduled date the delivery was made.

#### 4.4.1.1 Quantity and Value Codes

Upon pressing the **OK** button of the Supplier parameters, another window will be displayed:



The dialog box titled "Quantity & Value Discounts" contains two input fields: "Quantity code:" with the value "Q" and "Value code:" with the value "V". At the bottom, there are "OK" and "Cancel" buttons.

Some costs, like total freight cost of a PO or invoice, may need to be distributed among all items in a PO/invoice using a pro-rata method based on Quantity or Value of each item. To keep COSWIN free from the spoken languages, this parameter asks one character code for Quantity and Value.

##### Quantity code

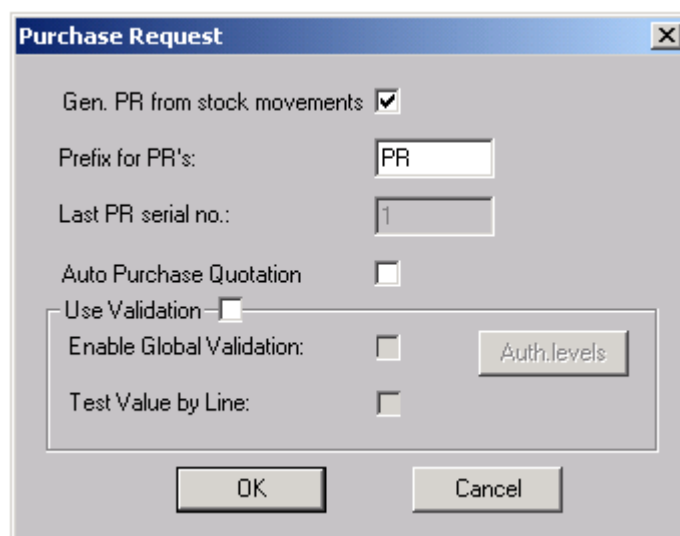
Specify a single character code for quantity, for example, 'Q'.

##### Value code

Specify a single character code for value, for example, 'V'.

#### 4.4.2 Defining PURCHASE REQUESTS

*Path:* Purchase / Purchase Requests



The "Purchase Request" dialog box contains several settings: "Gen. PR from stock movements" is checked; "Prefix for PR's:" is "PR"; "Last PR serial no.:" is "1"; "Auto Purchase Quotation" is unchecked; "Use Validation" is unchecked; "Enable Global Validation:" is unchecked with an "Auth.levels" button next to it; and "Test Value by Line:" is unchecked. At the bottom are "OK" and "Cancel" buttons.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 87 Date: 3 June 2002

### Gen PR from stock movement

If selected, COSWIN will prompt whether to generate Purchase Request whenever stock level is low due to a stock movement, like stock reservation, stock issue, transfer, etc.

### Prefix for PR's

Specify a prefix (maximum 4 alphanumeric characters) to be used when a purchase request reference is auto-generated by the system.

### Last PR serial no.

Specify the serial number to start with, when a purchase request reference is auto-generated by the system. Once updated, subsequent modification of this parameter is not possible.

### Auto Purchase Quotation

If selected, COSWIN will automatically create a Purchase Quotation whenever a Purchase Request is created.

### Authorisation levels

#### Use Validation

Specify if the authorization have to be activated for the Purchase Request. If this box is not selected, the others boxes are not accessible.

#### Enable Global Validation

If selected, COSWIN will prompt, during the validation of a PR, whether to validate automatically all the lines corresponding to the authorization level of the user.

If this box is not ticked, it will be mandatory to pass on all the lines.

#### Test value by line

The control is made following the amount of each line.

If this box is not ticked, the control is made following the total amount of the PR.

Enable Global Validation	Test value by line	COSWIN action
Yes	Yes	Propose to validate in one shot all the lines that are inside the range following the line value.
No	Yes	Oblige to validate line by line and not accept the line that are not inside the range following the line value.
Yes	No	Propose to validate in one shot all the line following the total value of the PR that has to be inside the authorization range
No	No	Oblige to validate line by line following the total value of the PR that has to be inside the authorization range.  <u>Remark:</u> If the first line is not accepted, the others lines will be neither accepted.  The interest is to oblige the user to validate one by one all the line even if the PR have an acceptable amount.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 88 Date: 3 June 2002

When click on the '**Auth. levels**' button, the following window appears for defining the Authorisation levels:

### **Define Authorisation levels:**

#### **Base value**

COSWIN begin the management of the authorization at this amount.

#### **Level**

Maximum of 5 levels may be defined.

#### **Value**

Indicate the high limit of authorization at that level.

#### **Authorized users**

List of the users that can authorize the Purchase Request whose amount value lies between the "Base Value" And "Level Value"

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 89 Date: 3 June 2002

### 4.4.3 Defining QUOTATIONS

*Path:* Purchase / Quotations

The screenshot shows a 'Quotations' dialog box with the following fields and values:

- Prefix for Quotation: PQ
- Last Quotation srl no: 1
- Copy Header Free Fields: ☐
- Copy Item Line Free Fields: ☐

Buttons: OK, Cancel

#### **Prefix for Quotation**

Specify the prefix to be used when a Quotation is auto-generated by the system (maximum 3 alphanumeric characters).

#### **Last Quotation srl no.**

Specify the last serial number when a quotation is auto-generated.

#### **Copy Header Free Fields**

If selected, COSWIN will copy the content of the free fields saved at the header level of Quotation module to that of the Purchase Order when Purchase Order is created from a Quotation.

#### **Copy Item Line Free Fields**

If selected, COSWIN will copy the content of the free fields saved at the item details level of Quotation module to that of the Purchase Order when Purchase Order is created from a Quotation.

#### 4.4.4 Defining PURCHASE ORDERS

*Path:* Purchase / Purchase Orders

##### Prefix for POs

Specify a prefix of (maximum 4 alphanumeric characters) to be used when a purchase order reference is auto-generated by the system.

##### Last PO serial no.

Specify the serial number to start with, when a purchase order reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

##### Chrono. Number

If checked, the Purchase Order number will only be issued after the new Purchase Order record is saved. This is to avoid having missing PO number due to aborted creations.

##### Copy Header Free Fields

If selected, COSWIN will copy the content of the free fields saved at the header level of Purchase Request module to that of the Purchase Order when Purchase Order is made against a Purchase Request.

##### Copy Item Line Free Fields

If selected, COSWIN will copy the content of the free fields saved at the item details level of Purchase Request module to that of the Purchase Order when Purchase Order is made against a Purchase Request.

**Print After Authorization:** If selected, purchase order will be printed upon a purchase order being authorised.

##### Use Authorization

Specify if the authorization have to be activated for the Purchase Order. That is, if selected, all purchase orders must first be authorised before it can proceed to order.

When click on the '**Auth. levels**' button, the following window appears for defining the Authorisation levels:



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 91 Date: 3 June 2002

#### **Define Authorisation levels:**

##### **Base value**

COSWIN begin the management of the authorization at this amount.

##### **Level**

Maximum of 5 levels may be defined.

##### **Value**

Indicate the high limit of authorization at that level.

##### **Authorized users**

List of the users that can authorize the Purchase Order whose amount value lies between the "Base Value" And "Level Value"

Upon clicking the **Ok** button, the following window will be displayed to specify the default ship-to and bill-to address of a purchase order:

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 92 Date: 3 June 2002

**Ship To Address:** Specify the address to which the consignment must be shipped.

**Bill To Address:** Specify the address to which the invoice must be despatched.

## 4.4.5 Defining INVOICES

*Path:* Purchase / Invoices

### Prefix for Invoices

Specify a prefix of (maximum 4 alphanumeric characters) to be used when an invoice reference is auto-generated by the system.

### Last Invoice srl no.

Specify the serial number to start with, when an invoice reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

### Copy Header Free Fields

If selected, COSWIN will copy the content of the free fields saved at the header level of Purchase Order module to that of the Invoice when Invoice is issued against a Purchase Order.

### Copy Item Line Free Fields

If selected, COSWIN will copy the content of the free fields saved at the item details level of Purchase Order module to that of the Invoice when Invoice is issued against a Purchase Order.

### Use Authorization

Specify if the authorization have to be activated for the Invoice.

When click on the '**Auth. levels**' button, the following window appears for defining the Authorisation levels:

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 93 Date: 3 June 2002

#### **Define Authorisation levels:**

##### **Base value**

COSWIN begin the management of the authorization at this amount.

##### **Level**

Maximum of 5 levels may be defined.

##### **Value**

Indicate the high limit of authorization at that level.

##### **Authorized users**

List of the users that can authorize the Invoice whose amount value lies between the "Base Value" And "Level Value"

## **4.4.6 Defining INVOICE RECONCILIATIONS**

*Path:* Purchase / Reconciliations

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 94 Date: 3 June 2002

### Prefix for Invoices

Specify a prefix of (maximum 4 alphanumeric characters) to be used when an invoice reconciliation reference is auto-generated by the system.

### Last Invoice srl no.

Specify the serial number to start with, when an invoice reconciliation reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

## 4.4.7 Defining CREDIT NOTES

*Path:* Purchase / Credit Notes

### Prefix for Credit Note

Specify a prefix of (maximum 4 alphanumeric characters) to be used when a credit note reference is auto-generated by the system.

### Last credit note srl no.

Specify the serial number to start with, when a credit note reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

### Use Authorization

Specify if the authorization have to be activated for the Credit Note.

When click on the '**Auth. levels**' button, the following window appears for defining the Authorisation levels:

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 95 Date: 3 June 2002

#### **Define Authorisation levels:**

##### **Base value**

COSWIN begin the management of the authorization at this amount.

##### **Level**

Maximum of 5 levels may be defined.

##### **Value**

Indicate the high limit of authorization at that level.

##### **Authorized users**

List of the users that can authorize the Credit Note whose amount value lies between the "Base Value" And "Level Value"

## **4.4.8 Defining SUPPLIER PERFORMANCE**

*Path:* Purchase / Performance

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 96 Date: 3 June 2002

### Prefix for Supplier Performance

Specify a prefix of (maximum 4 alphanumeric characters) to be used when a supplier performance reference is auto-generated by the system.

### Last Supplier Performance srl no.

Specify the serial number to start with, when a Supplier Performance reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

## 4.4.9 Defining PACKAGES

*Path:* Purchase / Packages

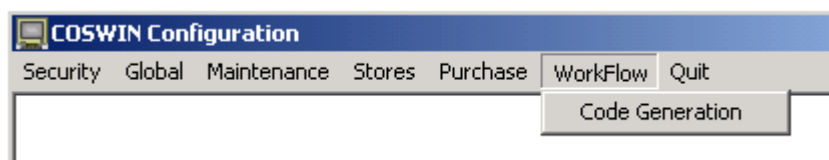
### Prefix for Package

Specify a prefix of (maximum 4 alphanumeric characters) to be used when a package reference is auto-generated by the system.

### Last Package srl no.

Specify the serial number to start with, when a Package Reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

## 4.5 WORKFLOW PARAMETERS



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 97 Date: 3 June 2002

## 4.5.1 Defining WORKFLOW CODE GENERATION

*Path:* Workflow / Code Generation

### Prefix for Work Flow

Specify a prefix of (maximum 4 alphanumeric characters) to be used when a work flow reference is auto-generated by the system.

### Code Suffix

Specify the serial number to start with, when a work flow reference is auto-generated by the system. *Once updated, subsequent modification of this parameter is NOT possible.*

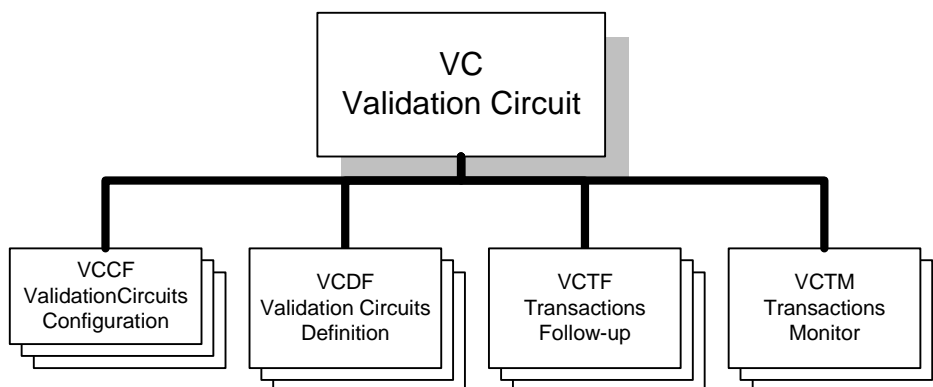
Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 98 Date: 3 June 2002

## 5. VALIDATION CIRCUIT AND WORKFLOW

The purpose of Validation Circuit function is to provide the user the facilities:

- to define the validation circuits to be used
- to notify the users about the different transactions that have to be validated
- to perform the steps of the circuit (validate the transactions)

The functional breakdown of the Validation Circuit function is presented in the following diagram:



### 5.1 VALIDATION CIRCUITS CONFIGURATION (VCCF)

#### 5.1.1 Purpose

The purpose of Validation Circuits Configuration function is

- to turn on/off the mechanisms of validation circuits
- to establish the prefix and suffix to be used in the validation circuit auto-generated codes
- to personalize the use of the Transactions Monitor function by COSWIN users

### 5.2 VALIDATION CIRCUITS DEFINITION (VCDF)

#### 5.2.1 Purpose

The purpose of Validation Circuits Definition function is to define the circuits of validation used by the different company entities for the different transactions they create. The following types of transactions will be considered as candidates of the validation circuit:

- Job request
- Work order
- Work permit
- Stock demand



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 99 Date: 3 June 2002

- Stock transfer
- Purchase request
- Purchase order
- Purchase invoice

Each circuit definition consists of two parts: the general data (header) and a number of validation steps.

The following information is stored in the general data of the circuit definition:

- Code – the reference code of the validation circuit
- Description – short description (name) of the validation circuit
- Creator – the login name of the user that created the validation circuit
- Comments – comments (long description) about the validation circuit
- Status – the status of the validation circuit with the following values: 0 – CREATED, 1 – STARTED and 2 – CLOSED.
- As on – date/time of creation or last update of the validation circuit
- Type – the type of COSWIN transaction to which the circuit will be applied
- Authority – the link with company entity that will use the validation circuit
- Size – the number of steps in the validation circuit
- To process – the number of transactions currently in the validation circuit
- Processed – the number of transactions that successfully passed the validation circuit

There shall not be several circuits 0 – CREATED or 1 – STARTED defined for the same company entity and the same transaction.

A list of steps can be defined to each validation circuit. Each step defines the users that have to receive notifications about the transactions being progressed into the step.

The following information is stored for each validation step:

- Index – the index of the validation step (the first step is indexed 0)
- Notifications – the number of users notified by the validation step
- To process – the number of transactions currently in the validation step
- Processed – the number of transactions that successfully passed the validation step

By default the Validation Circuit screen looks as follows:

Workflow Validation Circuit

Code : VC00000101 Test

Company : AFC Automatic Fare Collection System

Created by : SUPERVISOR Type : 5. Purchase request Status : 0. Created

Size : 1 To process : 0 Processed : 0

As on date : 11-09-2002 As on time : 11:05

Specifications Condition Comments

Index	Type	Notifications	To Process	Processed
0	0	1	0.	0.

## Field Level Descriptions

### Code

This is the reference code of validation circuit, mandatory information. The validation circuit code is unique among the validation circuits in the system.

### Description

This is the short description of the validation circuit. It is mandatory information.

**Authority** This is the company entity for which the validation circuit is created, mandatory information. Selection list facility shall be available.

### As On Date

This is the date of the definition or last update of the validation circuit, read-only information automatically managed by the system.

### As On Time

This is the time of the definition or last update of the validation circuit, read-only information automatically managed by the system.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 101 Date: 3 June 2002

### Creator

This is the login name of the user that created the validation circuit, read-only information automatically managed by the system.

### Status

This is the status of the validation circuit, mandatory information having the following values:

0. CREATED
1. STARTED (at least one transaction has been processed or is in the process of validation)
2. CLOSED

Information is not while adding a new validation circuit.

### Type

This is the type of transaction for which the validation circuit is defined, mandatory information. The combo-box shall allow to define the following types:

0. Job request
1. Work order
2. Work permit
3. Stock demand
4. Stock transfer
5. Purchase request
6. Purchase order
7. Purchase invoice

### Size

This is the number of steps in the validation circuit, read-only information automatically managed by the system.

### To Process

This is the number of transactions currently followed in the validation circuit, read-only information automatically managed by the system.

### Processed

This is the number of transactions that successfully passed the validation circuit, read-only information automatically managed by the system.

### Comments

This OLE multi-line enables the user to provide in extent information about the validation circuit steps to be taken. The interface consists of the drawing layout, where the user can write text and / or append pictures, drawings, spreadsheets and any other form of OLE information.

## Steps Tab

Specifications				
Condition				
Comments				
T Index	T Type	Notifications	T To Process	T Processed
0	0	1	0.	0.

This list displays the steps in the validation circuit. The following information is displayed for each validation step:

- **Index** – the index of the validation step (the first step is indexed 0)
- **Notifications** – the number of users notified by the validation step
- **To Process** – the number of transactions currently in the validation step
- **Processed** – the number of transactions processed and already passed the validation step

## 5.2.2 To ADD validation Circuits

Minimum information required to add a new validation circuit is:

- Code
- Description
- Authority
- Type
- At least one validation step

The system will automatically propose the following information when a new validation circuit is created:

- 0 – CREATED as Status
- User login ID as Creator
- Current date and time as As On Date and As On Time

The system will automatically generate a reference code for the validation circuit when the user does not fill in a code.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 103 Date: 3 June 2002

### 5.2.3 To MODIFY an existing validation circuit

The information that can be modified, is:

- Description
- Authority
- Type
- Status
- Comments

Authority and Type can be modified only if the validation circuit has not been already started (no transactions have been processed or are already in the process of validation for the current circuit, i.e. **Status is 0 – CREATED**).

The system will automatically modify Status to **1 – STARTED** when the first transaction start to be followed using the validation circuit. Status cannot be modified back to **0 – CREATED**.

Status cannot be modified to **2 – CLOSED** if transactions are currently processed. Status cannot be manually modified back to **1 – STARTED** if there is already a validation circuit for the same transaction and authority having the status **0 – CREATED** or **1 – STARTED**.

The system will automatically update the As On Date and As On Time.

### 5.2.4 To DELETE an existing Validation Circuit

Only closed validation circuits can be deleted. All the validation steps are also deleted in this case

On double clicking on any of the line item in the step window the following screen is displayed:

The screenshot shows a software window titled 'Specifications' with three tabs: 'Condition', 'Comments', and 'Notifications'. The 'Condition' tab is active. It contains the following fields:

- Index:** A numeric input field with the value '0'.
- Notifications:** A numeric input field with the value '1'.
- To process:** A numeric input field with the value '0'.
- Processed:** A numeric input field with the value '0'.
- Type:** A dropdown menu showing '0. Disjunctive(OR)'.

Below the 'Condition' tab is a 'Notification' section containing a table with two columns: 'User name' and 'Group or User'.

User name	Group or User
SMG	0. User

The table has a blue header and a single data row. The 'User name' column is highlighted in blue. The table is scrollable, as indicated by the scrollbar on the right.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 104 Date: 3 June 2002

## Index

This is the index of the validation step, a positive integer number. The first step is indexed 0.

## Notifications

This is the number of users notified by the validation step, read-only information automatically managed by the system.

## To Process

This is the number of transactions currently in the validation step, read-only information automatically managed by the system.

## Processed

This is the number of transactions processed that already passed the validation step

## Notified Users

This is the list of COSWIN users that will be notified in the validation step.

## 5.3 TRANSACTIONS MONITOR (VCTM)

### 5.3.1 Purpose

The purpose of Transactions Monitor function is to check for pending transactions (transactions that need their validation), inform the users about existence of pending transactions and provide horizontal navigation to the modules that process and validates the pending transactions.

This module shall be auto-loadable (opened automatically) by COSWIN users having defined this option in COSWIN Configuration.

The module implements a timer function to check for the pending transactions. The interval of the timer is user definable in COSWIN Configuration.

The module informs graphically the user about:

- the existence of new transactions to be validated (transactions that became pending from the last check performed)
- the existence of old transactions to be validated (transactions that are not new but still pending)

The module process (scan) the notifications and present the user the list of notifications received. The notifications will be the elements created when pending transactions gets validated and therefore progressed to a new step in the circuit. When a pending transaction is validated, notifications will be sent to all the users attached to the next step in the validation circuit.

A transaction T is pending to a user U if and only if:

1. a notification N was addressed to the user U concerning the transaction T
2. a notification N was addressed to the group of users G concerning the transaction T and the user U is member in the group G

The module allows filtering the list to display only certain types of pending transactions (work orders, purchase orders, etc.). The module allows sorting the pending transactions by their date.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 105 Date: 3 June 2002

The screen by default looks as follows:

Reference	TEtat	Type of Transaction	Current step	TAbsent	TAcknowledge Date	TAcknowledge Time
JBRQ070735	2	0. Job request	0	0	23-09-2002	10:33

## Transaction

This is a radio-button specifying the type of the transactions to be displayed in the list of pending transactions (notifications). The possible positions of the radio-button are:

- ALL
- Job request
- Work order
- Work permit
- Stock demand
- Stock transfer
- Purchase request
- Purchase order
- Purchase invoice

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 106 Date: 3 June 2002

## User

This is the name of the user that currently uses the application. It is read-only information.

## Group

This is the group of the current user. It is read-only information.

## Refresh every minute

This is the time interval between two refreshes of the notification list as defined in the COSWIN configuration, expressed in minutes. It is read-only information.

## Last check

This is the time of the last read of the notification list. It is read-only information.

## Notifications List Box

This list displays the notifications currently pending for the current user. The following information is displayed for each notification:

- **Reference:** This is the reference of the transaction
- **Etat:** This is the status of the signature
  - 0 : To be Signed
  - 1 : To be signed by the next user
  - 2 : Refused by the previous user
  - 3 : Refused and removed from the workflow
  - 4 : Transaction returned to the creator
  - 5 : Transaction re-introduced in the workflow by the creator
- **Type of Transaction** – The type of the pending transaction with the following convention:
  - 0. JOB REQUEST
  - 1. WORK ORDER
  - 2. WORK PERMIT
  - 3. DEMAND
  - 4. TRANSFER
  - 5. REQUEST
  - 6. ORDER
  - 7. INVOICE
- **Current Step** – the number of the step in the validation circuit in which the pending transaction currently is
- **Creation date/time** – the date and time when the notification was created
- **Acknowledge date/time** – the date and time when the user was first informed about the pending transaction



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 107 Date: 3 June 2002

The Transactions Monitor window allows horizontal navigation to the COSWIN specific module that manage the pending transactions. Horizontal navigation is performed like in all the other COSWIN modules when double clicking a line in the list-box or when pressing F7.

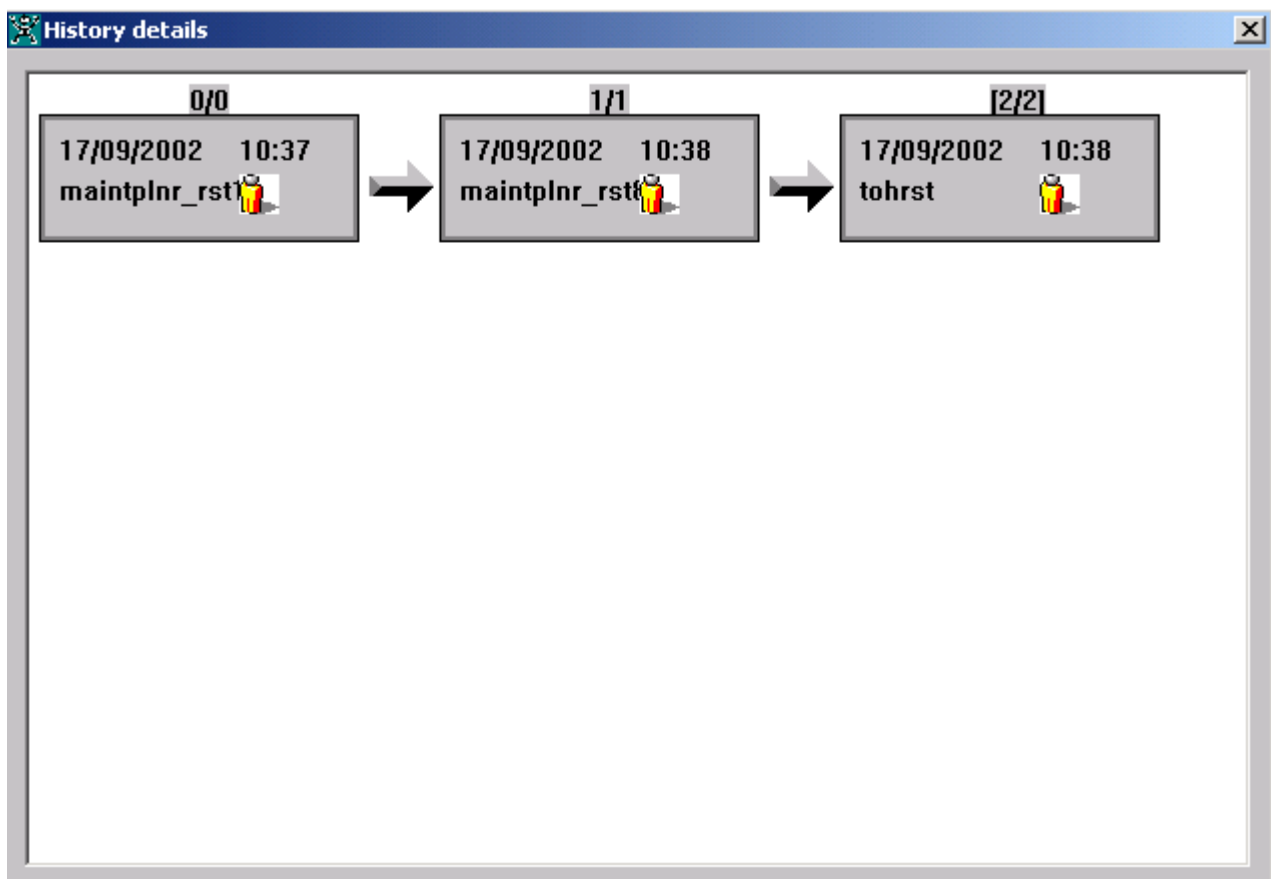
## OPERATIONS

These operations are accessible via the standard buttons in the associated toolbar:



**History:** 

By pushing this button you will open a dialog containing a graphical representation of the list of already made or validations to be made for the current transaction.



In this dialog we can see:

For a transaction that has just entered the validation:

- \* All the notified users in the validation circuit.

For each step of a transaction already in the validation circuit:

- \* The notification date for each notified user
- \* The validation date for each notified user
- \* Grey arrows for the validation steps performed
- \* Red arrows for transaction rejection. In this case it is possible to see the rejection reason by clicking on the graphical representation of the rejected validation step.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 108 Date: 3 June 2002

**Sign:** 

By pushing this button you will validate the transaction and pass it to the next validation step (if no other validation is required from other notified users in the validation step). Once validated, the transaction will be displayed (with status 1) as long as the next validation step was not performed.

**Reject:** 

By pushing this button you will reject the transaction. This means that you will send the transaction to the notified users of the previous validation step or to the user that created the transaction (when the 1st validation step is rejected).

There will be prompt to enter Comments for rejection whenever any transaction is rejected.

### **Important Note:**

The functionalities History, Sign and Reject are available in the standard toolbar reflecting the possible actions for each transaction and each user.

These 3 functionalities are also available in all COSWIN modules having a validation circuit in progress. They will be enabled or disabled according to the current user and the validation step for the current transaction.

Additionally, the History function is still available for transactions that finished their validation circuit. The function is available in the corresponding COSWIN module and allows to consult the history of the different validation steps.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 109 Date: 3 June 2002

## 6. AUDIT TRAIL

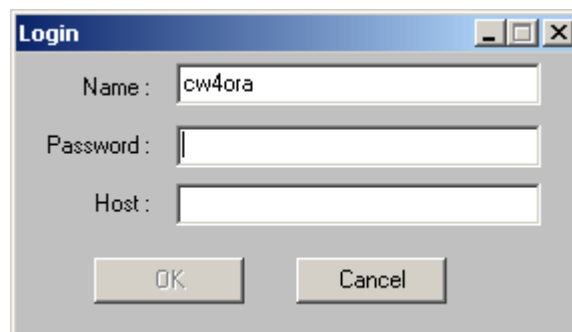
### 6.1 GENERAL OVERVIEW

This module allows to follow actions (Add, Modify, Delete) performed on COSWIN transactions.

#### 6.1.1 Activation Of Audit Trail

From Windows menu, click on « Start – Run » and enter the following command line:

"C:\Coswin\Bin\Audit.exe"



A Windows-style dialog box titled "Login". It contains three text input fields: "Name:" with the text "cw4ora" entered, "Password:" which is empty, and "Host:" which is empty. Below the fields are two buttons: "OK" and "Cancel".

Enter the name of the schema (coswin by default), the corresponding password (coswin by default) and the alias name :



A Windows-style dialog box titled "Audit". It features a list box containing the following items: "Equipment Topographical", "Job Directory", "Job Guidelines", "Plan Jobs", "Work Orders", "Job Request", "PMP Data", "Stock Register", and "Stock Receipt". Below the list box are three checked checkboxes: "Insert", "Update", and "Delete", followed by a "Set" button. Underneath is a section labeled "Remove Old Data" containing an "Until:" text field, a "dd/mm/yyyy" date format indicator, and a "Delete" button. At the bottom are two radio buttons: "For all modules" (unselected) and "For current module" (selected), followed by "OK" and "Cancel" buttons.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 110 Date: 3 June 2002

### 6.1.2 List of Modules

Audit Trail in COSWIN is provided for the following modules :

1. Equipment Topographical
2. Job directory
3. Job Guidelines
4. Plan Jobs
5. Work Orders
6. Job Request
7. PMP Data
8. Stock Register
9. Stock Receipt
10. Stock Demand
11. Stock Issue
12. Stock Adjustment
13. Supplier Register
14. Purchase Request
15. Purchase Quotation
16. Purchase Order
17. Invoice
18. History Work Order

### 6.1.3 USER INTERFACE

<b>List of modules:</b>	Correspond a list of modules for which Audit Trail is possible.
<b>Insert:</b>	Record the ADD mode
<b>Update:</b>	Record the MODify mode
<b>Delete:</b>	Record the DELeTe mode
<b>Set</b>	Save the audit configuration

<b><u>Remove Old Data:</u></b>	Reset the audit information
<b>Until:</b>	limit date of deletion
<b>For All Modules:</b>	for all Audit modules
<b>For Current Module:</b>	for the selected Audit module
<b>Delete:</b>	Start deletion process

### 6.1.4 ExAmple


How to activate the audit of modifications and deletions of Topographical details module?

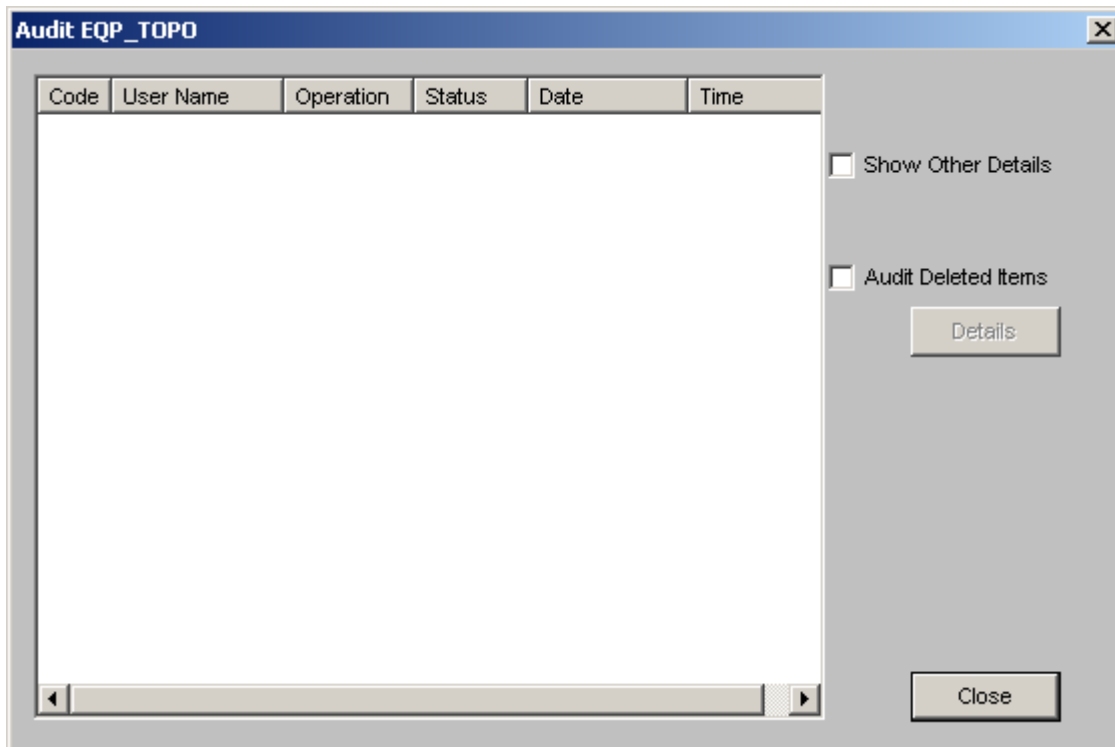
- Select « Equipment Topographical” in the list
- Check “Update“ and "Delete"
- Click on « Set »

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 111 Date: 3 June 2002

- Click on « Ok » to Exit

### 6.1.5 Audit Trail Access From COSWIN

Open a COSWIN module (Topographical details, Word Order details, ...) and click on the icon 



Code	User Name	Operation	Status	Date	Time
------	-----------	-----------	--------	------	------

☐ Show Other Details

☐ Audit Deleted Items

Details

Close

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 112 Date: 3 June 2002

<b>Code:</b>	Displays the code of the record concerned by the action
<b>User name:</b>	Displays the COSWIN login name that performed the action
<b>Operation:</b>	Displays the mode used
<b>Status:</b>	Displays the status of the transaction (e.g. WO status, purchase order status, ...)
<b>Date:</b>	Displays the date of action
<b>Time:</b>	Displays the time of action
<b>Show other details:</b>	Displays a supplementary column "Details" in the list. This column displays the database column(s) impacted by the action
<b>Audit deleted items:</b>	Displays the list of deleted records
<b>Details:</b>	Displays the history of the selected record

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 113 Date: 3 June 2002

## 7. CYCLICAL PRINTING

Cyclical printing can be achieved by using Lanceprg and Runrep applications. Both of these applications must be installed in the following directories:

**C:\Coswin\Interflanceprg\LANCEPRG.exe & C:\Coswin\Interflrunrep\RUNREP.exe** respectively.

### 7.1 LANCEPRG

LANCEPRG is executed as background task and is used to run (automatically) one or several programs defined in the program ini file (LANCEPRG.INI ).

It is used to execute periodically either every period (defined in minutes) or every day at a given time (format **HH:MM**).

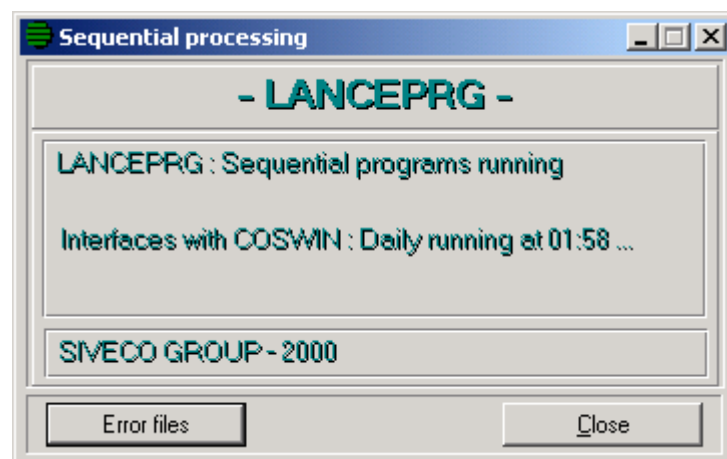
#### **Remarks:**

For a daily execution, "HEURE" parameter, the hour HH must be between 00 and 23, and the minutes MM must be between 00 and 59).

The workstation can be used when LANCEPRG is executed as a background task or when the programs are executed by LANCEPRG.

List of programs to be run is defined in LANCEPRG.INI file. Before execution, check the content of the file to ensure that the proper programs are executed and in the proper order.

To execute the program, run **LANCEPRG.EXE** in C:\Coswin\Interflanceprg



The main window is immediately reduced in the task bar just after execution.

#### 7.1.1 Parameterisation

This is done in the INI file of the program (LANCEPRG.INI) located in the same directory as LANCEPRG.EXE.

Example of LANCEPRG.INI content :

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 114 Date: 3 June 2002

```
[SIVECO]
n:\coswin\interf\login511\login.exe=
n:\coswin\interf\cliclac511\cliclac.exe=
n:\coswin\interf\ide511\ide.exe=

[LOGIN]
PARAMS=AUTO

[CLICLAC]
PARAMS=art

[IDE]
PARAMS=AUTO

[PARAMETRES]
PERIODE=
HEURE=01:00
```

In the section [SIVECO] the full path and name of each program (one line per program) must be defined. The character “=” at the end of each line is to be added, as in the example

For each program, a specific section containing the keyword “PARAMS” used to define the list of parameters used.

By default, the parameter is “AUTO”.

If one of the programs needs more than one parameter, then they must be defined in the same way as in the command line.

For example:

If the program n:\coswin\interf\progr\progr.exe is run with: *progr.exe param1 param2*  
It must be defined as following in LANCEPRG.INI :

```
[SIVECO]
c:\coswin\interf\progr\progr.exe=

[progr]
PARAMS=param1 param2
```

## 7.2 RUNREP

Some data need to be parameterised before running RUNREP.EXE.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 115 Date: 3 June 2002

## 7.2.1 REPEDT32.INI

REPSTAR ini file is located in the WINDOWS directory of the work station.

Edit REPEDT32.INI and add in section [GENERAL ] the following line :

**Connection string=DSN=COSWIN**

**Database;SERVER=<Instance>;SCHEMA=<Schema>;UID=<UserId>;PWD=<Password>**

where

<Instance> is the instance name of the COSWIN database

<Schema> is the schema name of the COSWIN database

<UserId> is one ORACLE user of the COSWIN database

<Password> is the corresponding password

NB: supervisor is mapped to schema\_admin (ex. Coswin\_admin)

For example :

**Connection string=DSN=COSWIN**

**database;SERVER=coswincs;SCHEMA=coswin;UID=coswin\_admin;PWD supervisor**

This will allow the REPSTAR reports to be opened / generated without entering the user, password and alias.

## 7.3 CMD FILES

CMD files used by RUNREP must be located in same directory as RUNREP.EXE (example \COSWIN\INTERF\RUNREP\)

## 7.4 REPSTAR COMMAND LINE

### 7.4.1 General Syntax

The general syntax for REPSTAR command line is the following

**[Full path of Repedt32.exe] [Full path of report] /@:[Action] /VAR [Variables]**

Where

**[Full path of report]** = directory and name of the report to execute

Example : C:\COSWIN\REPORT\RAPORT1.REP

**[Action ]** = REPSTAR actions to be done

G = Generate the report

P = Print the report

EX = Export the result in a ASCII file

S = Save the result in a PRR format

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 116 Date: 3 June 2002

! = Close REPSTAR after execution

Remark : if no action is defined, then the report is just opened.

**[Variable]** = Variables that can be used in the report

Remark : Variables can be defined in the command line or grouped in a external file or in REPEDT32.INI (See REPSTAR documentation)

## 7.4.2 Some Examples

### 1. C:\COSWIN\REP32\REPEDT32.EXE V:\COSWIN\REPORT\RAPPOR1.REP

Open REPSTAR with the report RAPPOR1.REP

### 2. C:\COSWIN\REP32\REPEDT32.EXE V:\COSWIN\REPORT\RAPPOR1.REP /@:G

Open REPSTAR with the report RAPPOR1.REP and generate the report

### 3. C:\COSWIN\REP32\REPEDT32.EXE V:\COSWIN\REPORT\RAPPOR1.REP /@:GP

Open REPSTAR with the report RAPPOR1.REP and generate/print the report

### 4. C:\COSWIN\REP32\REPEDT32.EXE V:\COSWIN\REPORT\RAPPOR1.REP /@:GP!

Open REPSTAR with the report RAPPOR1.REP and generate/print the report. Then close REPSTAR

### 5.C:\COSWIN\REP32\REPEDT32.EXE V:\COSWIN\REPORT\RAPPOR1.REP /VAR Zone= "Z1"

Open REPSTAR with the report RAPPOR1.REP.

The variable Zone with the value Z1 is then available in the list of external variables within REPSTAR.

### 6.C:\COSWIN\REP32\REPEDT32.EXE V:\COSWIN\REPORT\RAPPOR1.REP /@:EX /Q:'Query' /S:'v:\coswin\report\conf.spf' /F:'c:\coswin\report\RESULT.TXT'

Open REPSTAR with the report RAPPOR1.REP and generate the result in a ASCII file.

/Q:'Query' = name of the query to export

/S:'v:\coswin\report\conf.spf' = name and path of export specification file

/F:'c:\coswin\report\RESULT.TXT' = name and path of the result file

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 117 Date: 3 June 2002

## 7.5 ERROR FILE

RUNREP generate in his directory a log file named RUNREP.ERR.

This log file is updated to keep the full history of execution (date and time)

Subsequently, its size increase at each time. To purge it, you can delete it  
If the execution of a query failed, then this is reported in RUNREP.ERR.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 118 Date: 3 June 2002

## 8. LIMITATION ON CREATION OF WORK ORDER

COSWIN does not allow adding a new WO if the number of employee already allocated on WO for that station (based on Character 4, 5 and 6 of the Equipment Code), for that day (schedule date) and WO status = 0 - Created or 1 – In Progress, is higher than the pre-defined limit.

The program that is used to set the limit is MAJ\_BASE.dll. This can be found in the following folder: **Coswin/Interf/MAJ\_Base/MAJ\_BASE.dll**. The limit on the number of employee allocated to a station can be modified at the Resource Editor and the limit if changed affects all stations.

The link between the specific program and the Work Order Module must be defined under the “External Program” option of Resource Editor.

**Program Name:** C:\Coswin\Interf\MAJ\_Base\MAJ\_BASE.dll

**Program Arguments:** C:\Coswin\Interf\MAJ\_Base\|PROC\_CHKWO|<Eqpt Code>|<Schedule Date>|<DBName>|5

(NOTE: The number “5” indicated in the Program Arguments is the definition of the limit.)

**Program Alias:** MAJ\_BASE

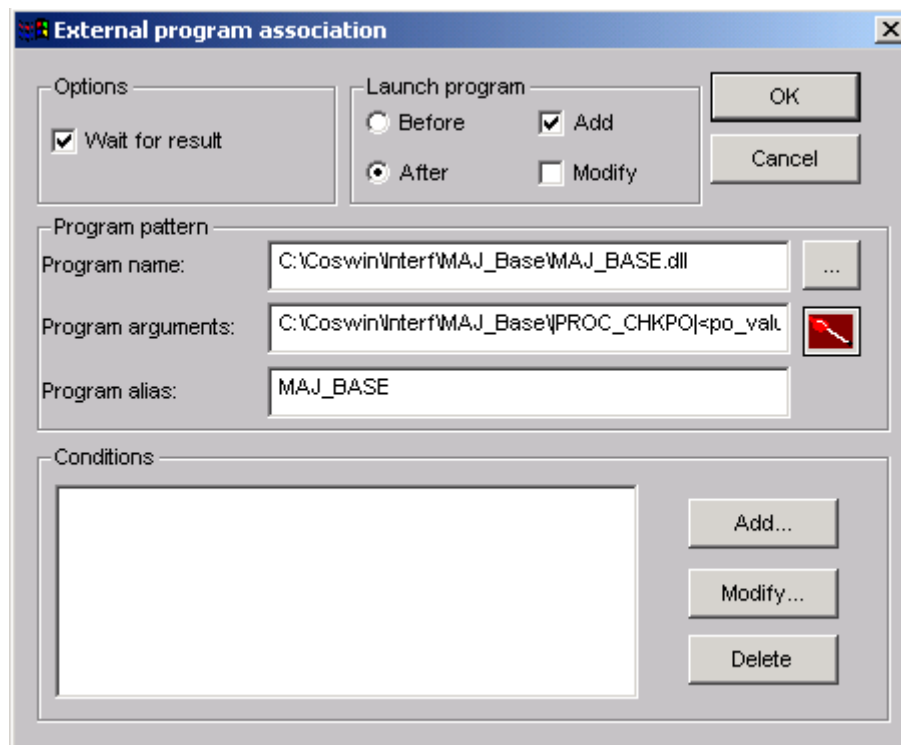
Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 119 Date: 3 June 2002

## 9. LIMITATION ON CREATION OF PO

COSWIN does not allow adding new PO if the value is higher than the defined value and if there is no Purchase Quotation for the PO.

The program that is used to set the limit is MAJ\_BASE.dll. This can be found in the following folder: **Coswin/Interf/MAJ\_Base/MAJ\_BASE.dll**. The limit on the PO value can be modified at the Resource Editor.

The link between the specific program and the Purchase Order Module must be defined under the “External Program” option of Resource Editor.



**Program Name:** C:\Coswin\Interf\MAJ\_Base\MAJ\_BASE.dll

**Program Arguments:** C:\Coswin\Interf\MAJ\_Base\PROC\_CHKPO|<po\_value>|<PO No>|<DBName>|10000

(NOTE: The number “10000” indicated in the Program Arguments is the definition of the limit.)

**Program Alias:** MAJ\_BASE

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM COSWIN STANDARD & CONFIGURATION	Page: 120 Date: 3 June 2002

## 10. SWITCH OVER MESSAGE PROMPT

### 10.1 SERVER SWITCH OVER MESSAGE

Upon switch over of the cluster a message shall warn the user that a switch-over occurs, and that he must login again. The following message shall be displayed:

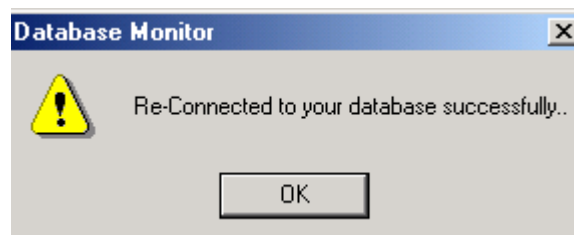
“WARNING: A switch-over of the servers occurs, you may be logged out, please login again into the MMS application”

### 10.2 LINK FAILURE MESSAGE

When there is a link failure to the MMS server, the following message appears:



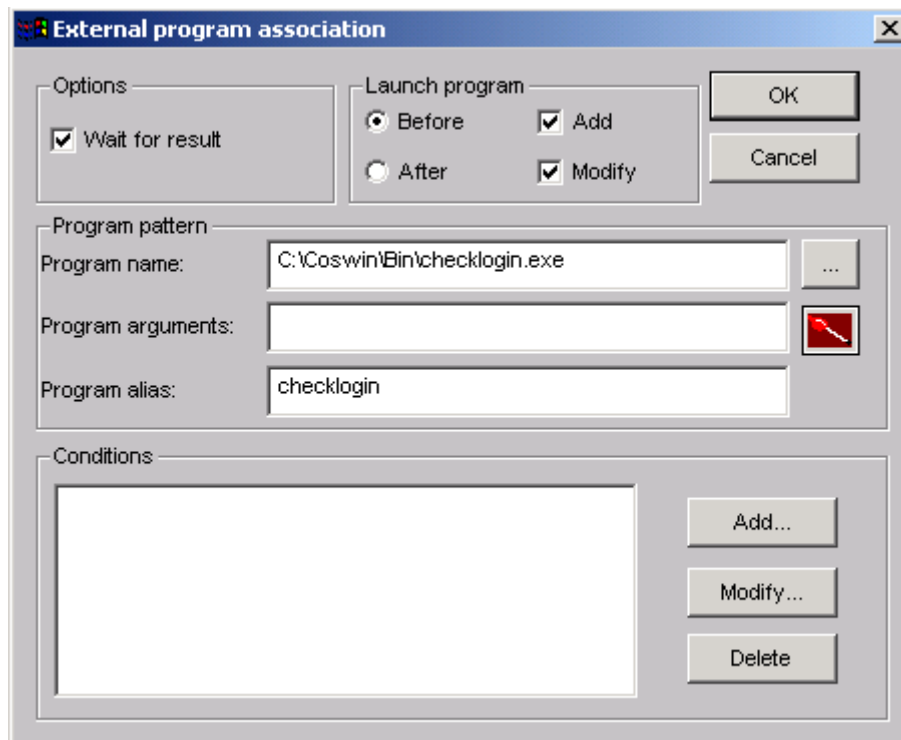
When the link is successfully established the following message appears:



## 11. CHECK LOGIN FEATURE

The system allows the administrator to configure the modules to cross verify with the users password before the transaction is saved. This can be achieved by the “checklogin” program.

The link between the program and the modules have to be done in the Resource Editor.

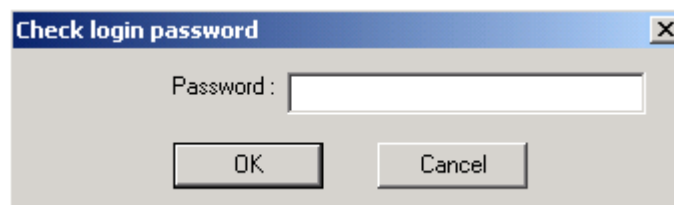


**Program Name:** C:\Coswin\Bin\checklogin.exe

**Program Arguments:**

**Program alias:** checklogin

In this case at each time the user attempts to save the record, the program will prompt the user for the login and save only if the entered password is correct.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 122 Date: 3 June 2002

## 12. **PAGING**

MMS allows the relevant staff to be paged for a particular maintenance action.

In COSWIN, paging is linked to the Job Request Module. The Maintenance planner shall modify the Job Request in Planner Review Module. This will allow the Maintenance Planner to amend the Problem Report, the Job Request priority or the Actioning Authority when necessary.

The pager number of the person to be paged will be defined at the level of the Authority using the Company Hierarchy module. The pager number and pager message shall be defined in the Commercial telex field and the Technical telex field of the Contacts tab in the Company Entity screen respectively.

It has to be noted that if the pager is an alphanumeric one, then the pager message will have to be prefixed with the character "A" followed by a space. Eg., **A** pls return call.

If the pager is a numeric one then in the place of the pager message it is recommended that the telephone number to which the page has to be returned be stored. Also it has to be noted that the number will have to be prefixed with the character "N" followed by a space. Eg., **N** 64132274

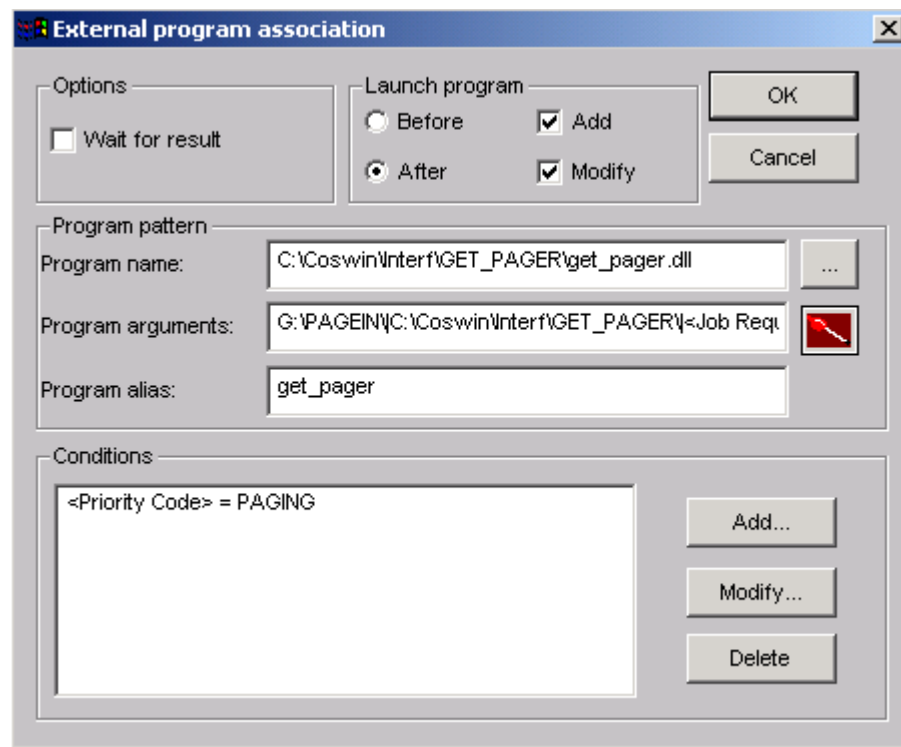
The administrator is to ensure that the folder **Paging** of the **MMSSvr** has to be linked as the **G** drive in all the PC's which would use the Paging feature.

### 12.1 CONFIGURATION OF PAGING

The program that is used is GET\_PAGER.DLL. This can be found in the following folder: **C:\Coswin\Interf\GET\_PAGER\GET\_PAGER.DLL**. The link between the program and the Planner Review Module can be done at the Resource Editor.

The link between the specific program and the Planner Review Module must be defined under the "External Program" option of Resource Editor.





**Program Name:** C:\Coswin\Interf\GET\_PAGER\get\_pager.dll

**Program Arguments:** GET\_PAGER needs 3 parameters separated by a pipe ( | ) character.

These parameters are :

- The extracted file path (here C:\)
- The location path of GET\_PAGER.SQL
- The job request number (use the special stick to get this information on planner review window)

G:\PAGEIN\C:\Coswin\Interf\GET\_PAGER\|<Job Request No>|<DBName>

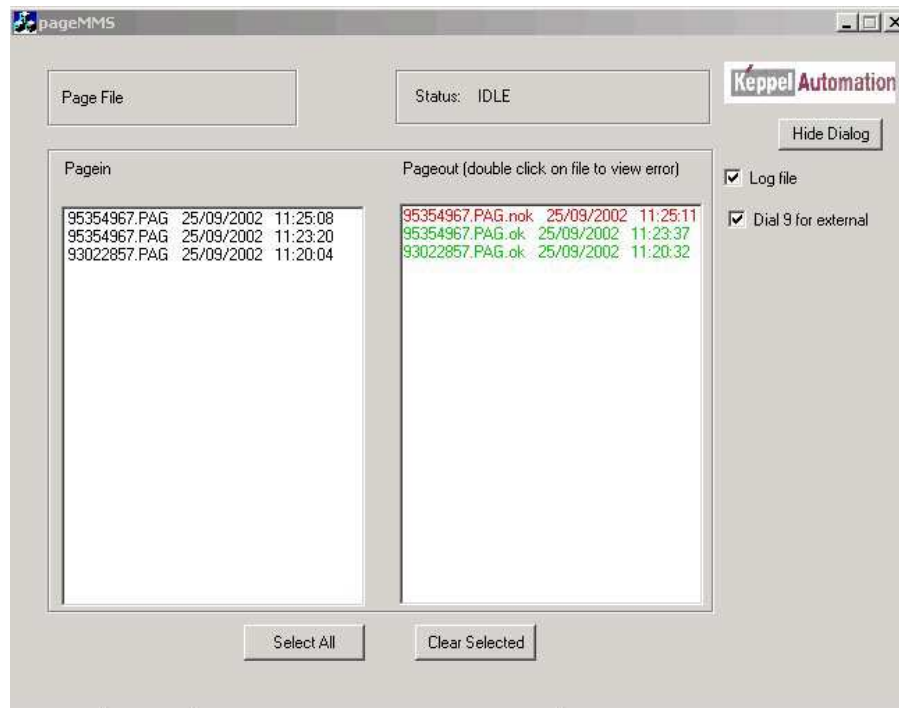
**Program Alias:** get\_pager

**Conditions:** <Priority Code> = PAGING

## 12.2 VERIFICATION OF PAGING

The software PageMMS.exe will be installed only on the Administration Terminal for paging. Administrator will have to ensure that the external program get\_pager.dll is linked to the Job Request Module.

To view the status of any paging the PageMMS application will have to be launched. The screen will look as displayed below:



### Page File

If there is a page that is being done when this screen is opened, then the number that is being paged will be displayed alongside the Page File.

### Status

- IDLE – when there is no paging
- PAGING – when there is paging

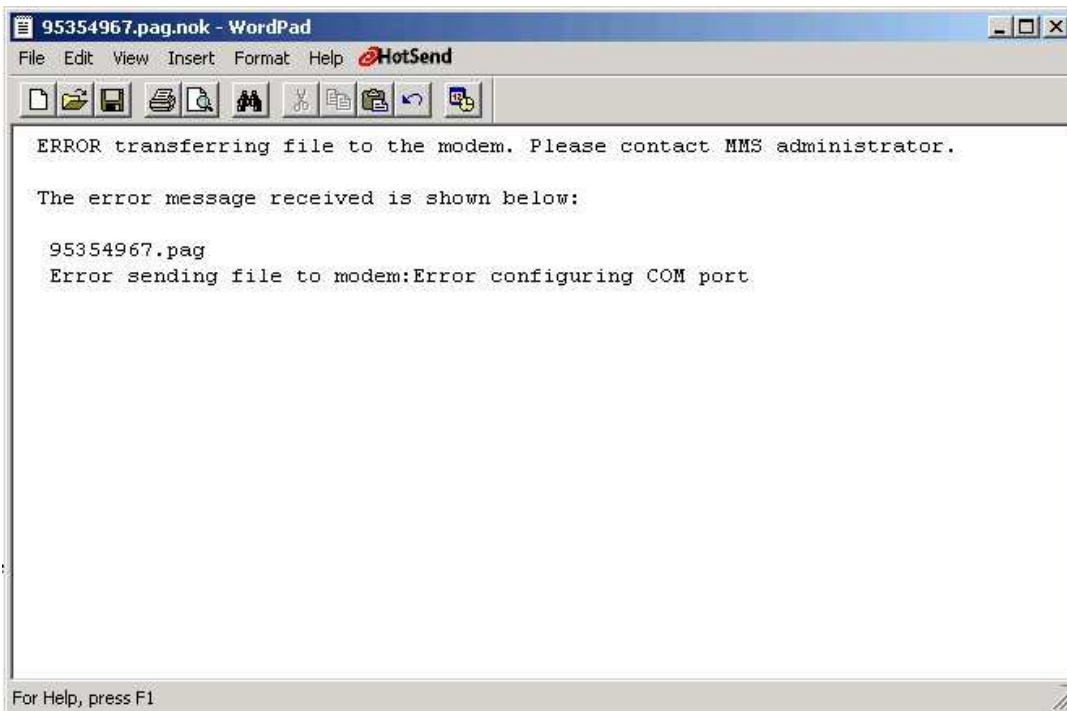
### Pagein Listbox

After the paging is complete, the details will be displayed in the pagein listbox.

### Pagout Listbox

If the paging is successful, page message will be displayed in green and an unsuccessful paging will be displayed in red.

If the paging is unsuccessful, there will be an error file that will be created. On double clicking on the failed transaction, the following error file will be displayed:



### Hide Dialog

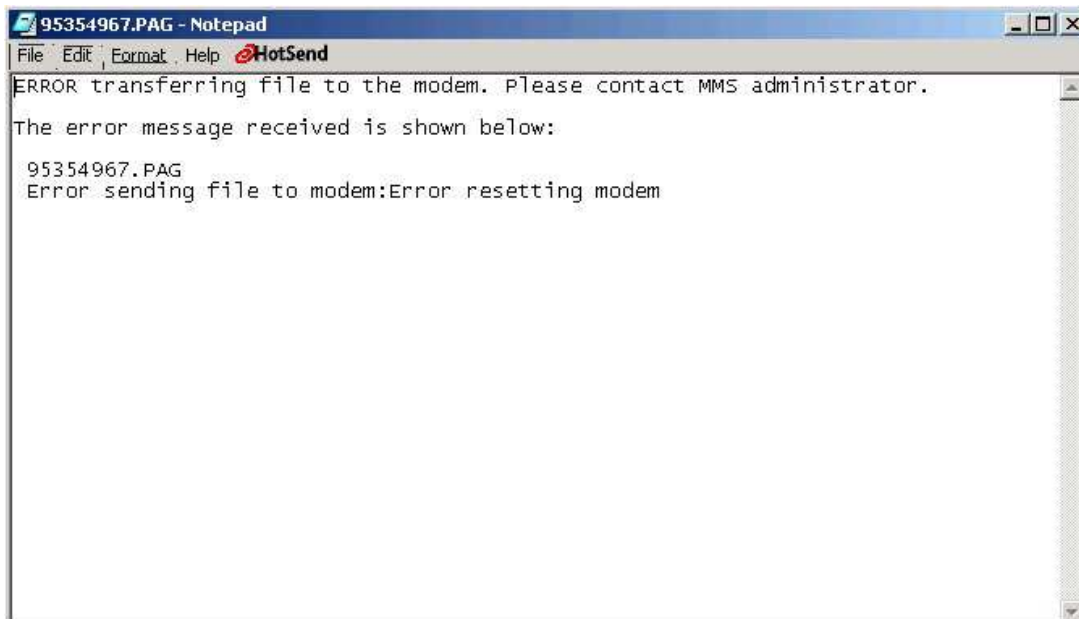
When this button is clicked the screen closes and gets displayed as an icon at the task bar as highlighted. In order to reopen the screen, use the right mouse click and the option "Maximise Control" at the icon.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 126 Date: 3 June 2002

## LogFile

To create a Log file have the option of “Log File” in the PageMMS screen checked. The log file is as shown below:



## Dial 9 for external

This check box should always be checked for external dialling.

## Select All

This button selects all the transactions that are displayed in the Pagein and Pageout list boxes.

## Clear Selected

This button clears all the transactions that are selected. If the “Select All” button has been used for selection all the transactions get cleared. If only a few transactions are to be cleared, the selection can be made with the mouse.

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 127 Date: 3 June 2002

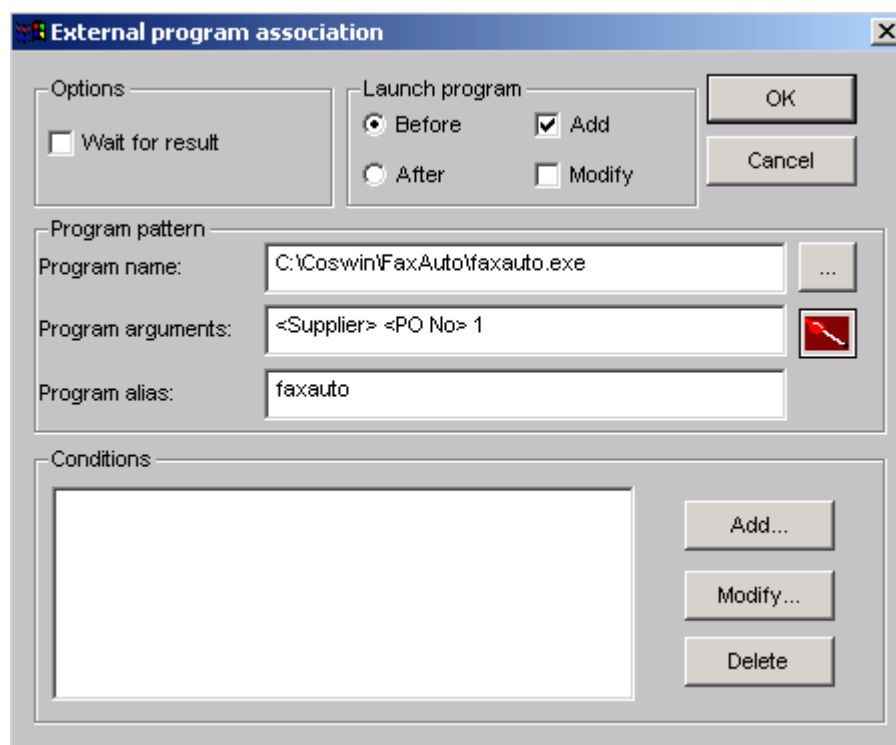
## 13. AUTO FAX

The system allows the administrator to configure the modules that can use auto faxing. The program has to be installed for this purpose under C:\Coswin\FaxAuto.

To fax, this program has to be first configured in Coswin Resources Editor. There are two modules to which this has to be configured:

1. Purchase Order
2. Purchase Quotation

### 1. Purchase Order



**Program Name:** C:\Coswin\FaxAuto\xfaxauto.exe

**Program Arguments:** <Supplier> <PO No> 1

**Program Alias:** faxauto

### 2. Purchase Quotation:

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 128 Date: 3 June 2002

**Program Name:** C:\Coswin\FaxAuto\faxauto.exe

**Program Arguments:** <Supplier> <PQ No> 0

**Program Alias:** faxauto

The files C:\Coswin\FaxAuto\faxnumber.ini and C:\Coswin\FaxAuto\faxnumberone.ini allow the configuration of the following:

- Oracle connection information,
- report name (full path is necessary),
- Repstar full path,
- name of the parameter in the report (which will be for the quotation number in faxnumber.ini and the PO number in faxnumberone.ini).

## 14. INSTALLATION OF SOFTWARE – TO BE COMPLETED

Along with COSWIN there the following applications have to be installed at each individual PC.

### 14.1 COSWIN

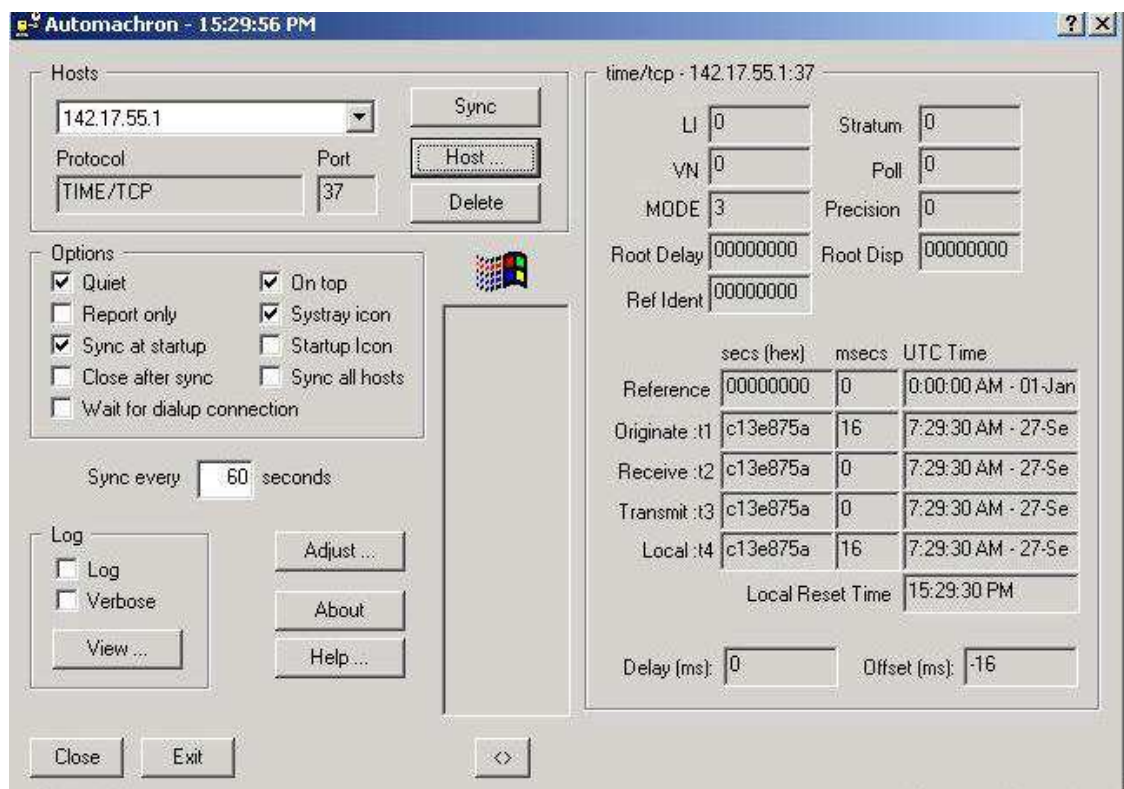
#### 14.1.1 Creation of Empty Database on the Server

Refer to **Section 4.3 Appendix C: Creating MMS Database Instance in System Maintenance Manual**

#### 14.1.2 Creation of Schema

### 14.2 ACHRON

- This folder is found under the name of **Achron\_v4\_006** on the CD.
- Copy this folder from the CD to the local drive of the PC.
- Create a shortcut for the **achron.exe** in the Startup folder of under the Start Menu Programs.
- Double click the exe to run the program. The following screen is displayed:



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 130 Date: 3 June 2002

The options that are to be configured are the **Host** to indicate which server the time should be synchronized with and **Sync every** to indicate the interval in which every synchronization should take place. Once closed it will be displayed as an icon in the

Windows task bar. 



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 131 Date: 3 June 2002

### 14.3 ADOBEACROBAT\_4\_0\_0318

- This folder is found under the name of **AdobeAcrobat\_4\_0\_0318** on the CD.
- Double click on the **Acrobat Reader 4.exe** that is present in the folder on the CD the application will be installed locally on the PC

### 14.4 DATABASEMOINTOR

- This folder is found under the name **databasemonitor\_v1\_0** on the CD
- Create a directory named databasemonitor under COSWIN.
- Copy the contents of the directory on the CD to C:\Coswin\databasemonitor.
- Copy the DBMON.ini that is present in the same folder on the CD to Windows directory.
- Change the parameters of the DBMON.ini appropriately as required. The main parameters to be configured here are the USERID, PASSWORD and the CONNECTSTRING. If the instance of the database to be accessed is other than 'MMS3' the CONNECTSTRING parameter in the ini file will have to be modified.

```
[DBMON]
#db user id
USERID=coswin

#db password
PASSWORD=cityrail

#dbconnectstring
CONNECTSTRING=mms3

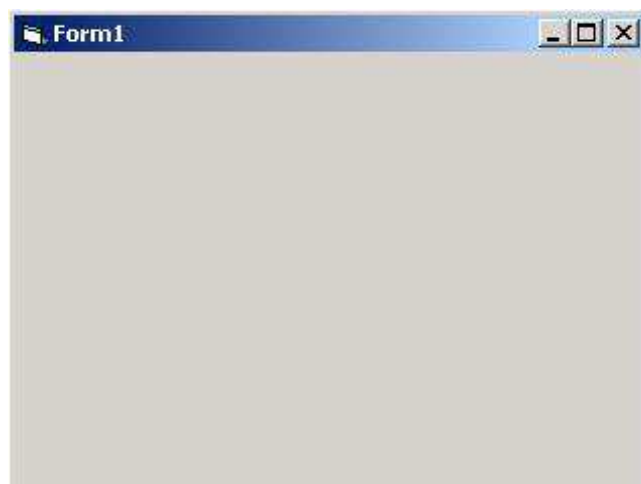
#INTERVAL IN MILLISECONDS
INTERVAL=5000

#databasename
DATABASENAME=CS54

#servername
SERVERNAME=MMS_SERVER
```

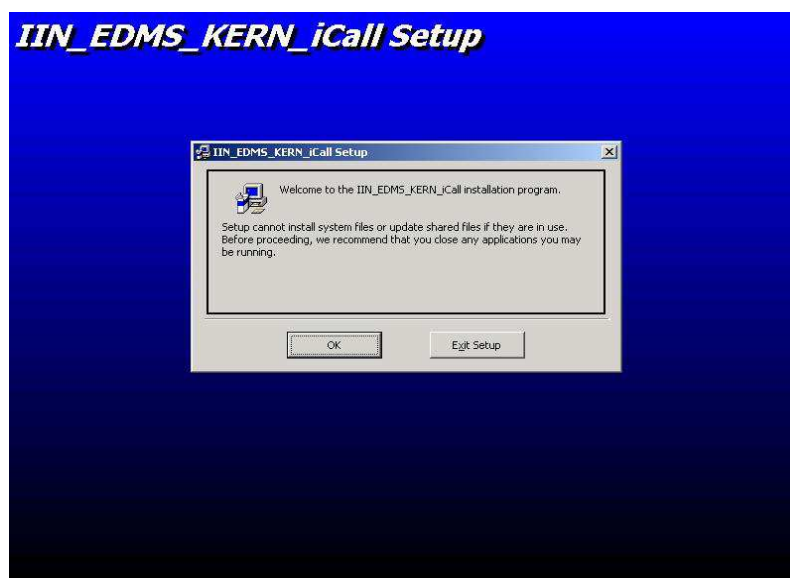
- Run **coswinstartcheck.exe**. The following form will be displayed. Close the form and restart the PC

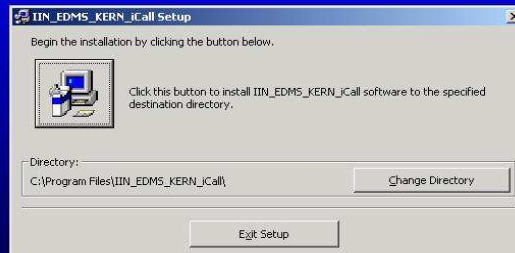
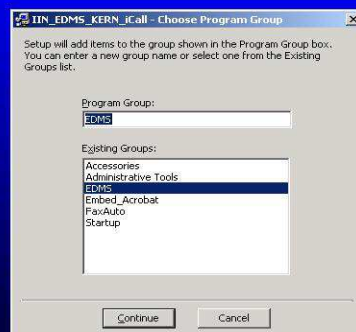
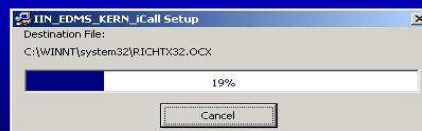
Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 132 Date: 3 June 2002



## 14.5 EDMS\_KERN

- This folder is found under the name **EDMS-KERN\_v1\_0** on the CD
- Run the setup.exe in \EDMS-KERN\_v1\_0\Setup folder. Follow the steps as shown below:



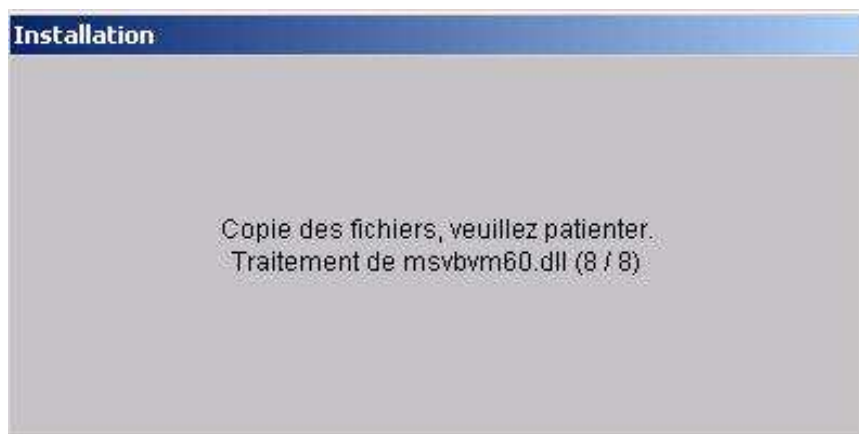
**IIN\_EDMS\_KERN\_iCall Setup****IIN\_EDMS\_KERN\_iCall Setup****IIN\_EDMS\_KERN\_iCall Setup**

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 134 Date: 3 June 2002



## 14.6 EMBEDACROBAT

- This folder is found under the name **EmbedAcrobat\_v1\_0** on the CD
- Run the setup.exe in. Follow the steps as shown below:



**Installation de Embed\_Acrobat****Installation de Embed\_Acrobat****Installation de Embed\_Acrobat**

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 136 Date: 3 June 2002



## 14.7 FAXAUTO

Select the FaxAuto directory and run the setup.exe to install locally on the PC.

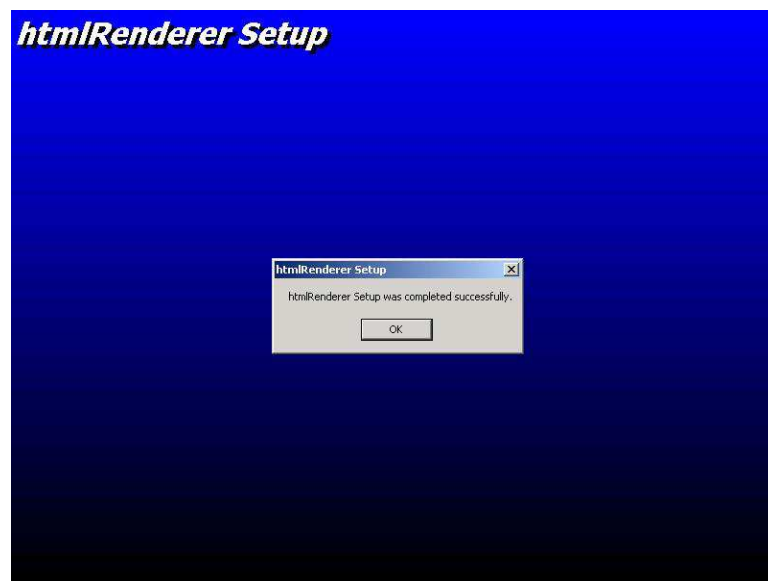
## 14.8 HTMLRENDERER

- c. This folder is found under the name **htmlRenderer\_v1\_0** on the CD
- d. Run the setup.exe in \htmlRenderer\_v1\_0\setup folder. Follow the steps as shown below:



**htmlRenderer Setup****htmlRenderer Setup****htmlRenderer Setup**

Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 138 Date: 3 June 2002



## 14.9 LAUNCHGRAPH

Select the LaunchGraph directory and run the setup.exe to install locally on the PC.

## 14.10 LCC

Copy the entire directory to the local drive.

## 14.11 TAS

Copy the entire directory to the local drive.



Keppel Steria Consortium (KSC)		C756
Reference: 756/PMP/8029c/- KSC Version: 2.0	MAINTENANCE MANAGEMENT SYSTEM <b>COSWIN STANDARD &amp; CONFIGURATION</b>	Page: 139 Date: 3 June 2002

## 15. END OF DOCUMENT

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