

PERCEPTION[®]

**Customizing Business
Rules, Reports & Data
Windows**

A Training Tutorial

This training tutorial outlines the features for users to customize the *PERCEPTION* system for their own operations.

This tutorial is a supplement to the user manual entitled “Getting Started With *PERCEPTION*,” which provides more details for the user.

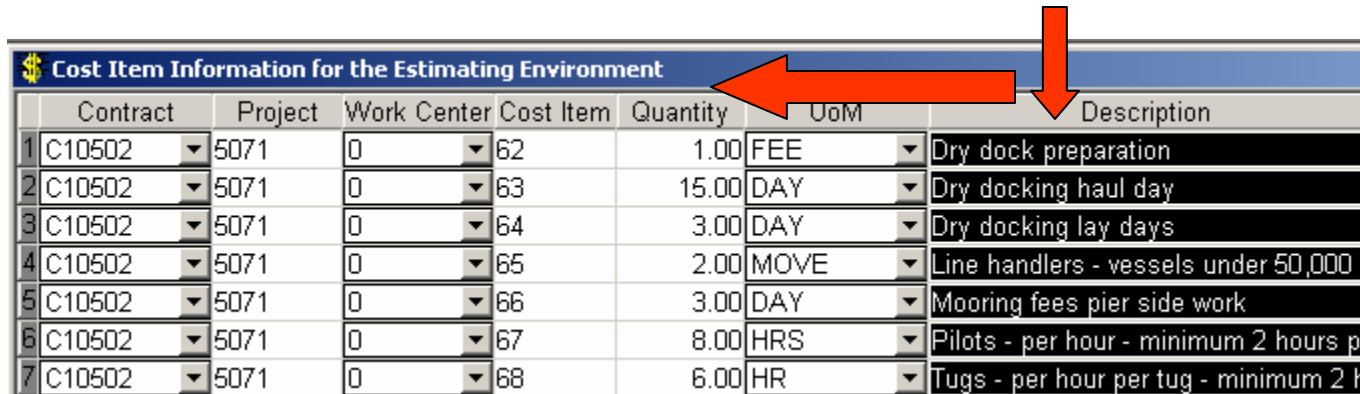
Customizing Worksheet Layouts

PERCEPTION offers a number of features that allows the user to customize the system.

Each worksheet scrolls to the right to display many different columns of information.

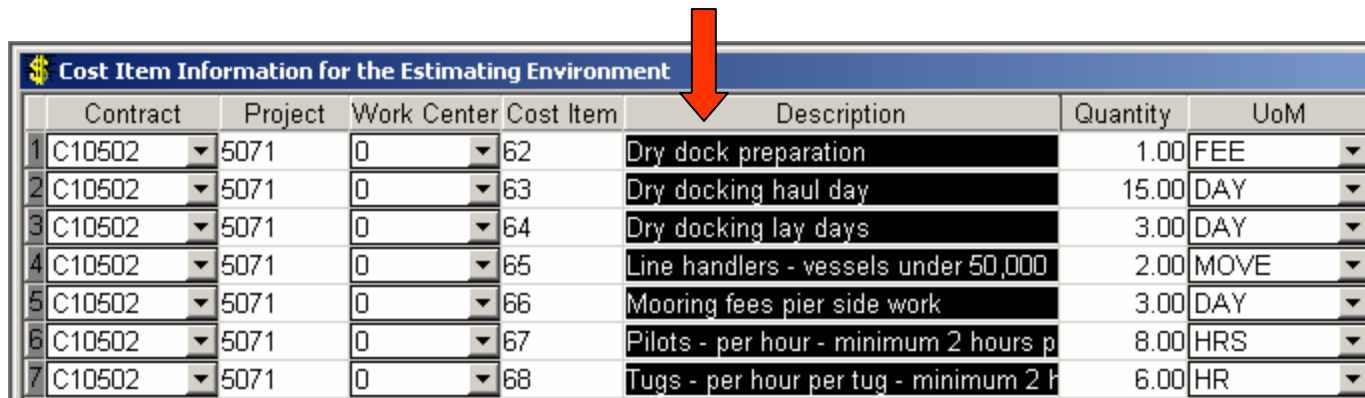
The user can customize each worksheet by **moving columns to any desired position on the worksheet.**

To move a worksheet column, simply click on the column header.



Cost Item Information for the Estimating Environment							
	Contract	Project	Work Center	Cost Item	Quantity	UoM	Description
1	C10502	5071	0	62	1.00	FEE	Dry dock preparation
2	C10502	5071	0	63	15.00	DAY	Dry docking haul day
3	C10502	5071	0	64	3.00	DAY	Dry docking lay days
4	C10502	5071	0	65	2.00	MOVE	Line handlers - vessels under 50,000
5	C10502	5071	0	66	3.00	DAY	Mooring fees pier side work
6	C10502	5071	0	67	8.00	HRS	Pilots - per hour - minimum 2 hours p
7	C10502	5071	0	68	6.00	HR	Tugs - per hour per tug - minimum 2 h

... and drag it to the desired position.



Cost Item Information for the Estimating Environment							
	Contract	Project	Work Center	Cost Item	Description	Quantity	UoM
1	C10502	5071	0	62	Dry dock preparation	1.00	FEE
2	C10502	5071	0	63	Dry docking haul day	15.00	DAY
3	C10502	5071	0	64	Dry docking lay days	3.00	DAY
4	C10502	5071	0	65	Line handlers - vessels under 50,000	2.00	MOVE
5	C10502	5071	0	66	Mooring fees pier side work	3.00	DAY
6	C10502	5071	0	67	Pilots - per hour - minimum 2 hours p	8.00	HRS
7	C10502	5071	0	68	Tugs - per hour per tug - minimum 2 h	6.00	HR

Data Window Designer

All columnar worksheets, free-form data windows and most system reports can be edited & customized by the user:

1. **Text Headings & Data Field Labels can be modified to suit specific user requirements. This includes using non-English text and Windows-supported non-English alphabetic characters.**
2. **Un-needed data columns and free-form data fields can be hidden from displayed view.**
3. **Data Fields can be re-arranged and re-sized in free-form data windows.**

Special Note: Version 8 of *PERCEPTION* supports uni-code. This enhancement allows use of complex Asian and Arabic alphabets within the *PERCEPTION* system.

Project Details Information for the Estimating Environment (Designer Mode)

Details Options Milestones Characteristics

Contract 1999-01 Description Sample Ship Repair Project

Project DES-1

Ship Type Contain.

	Labor	Material	SubCon	Travel
Hours	211.90		0.00	
Cost	0.00	294.50	0.00	0.00
Profit	0.00	0.00	0.00	0.00
G&A	0.00	0.00	0.00	0.00
Overhead	0.00	0.00	0.00	0.00
Local Tax	0.00	0.00	0.00	0.00
Federal Tax	0.00	0.00	0.00	0.00
Sub Totals	0.00	294.50	0.00	0.00

Start Date	00/00/0000	Min. Risk	294.50	Weight	
Finish Date	00/00/0000	Total Cost	294.50	Volume	
		Max. Risk	294.50	# of Cost Items	

Before Data Window Designer Changes

After Data Window Designer Changes:

(Data fields hidden, moved, re-sized, and text headings modified)

Project Details Information for the Estimating Environment (Designer Mode)

Details Options Milestones Characteristics

Contract ID 1999-01

Project ID DES-1

Ship Type Contain.

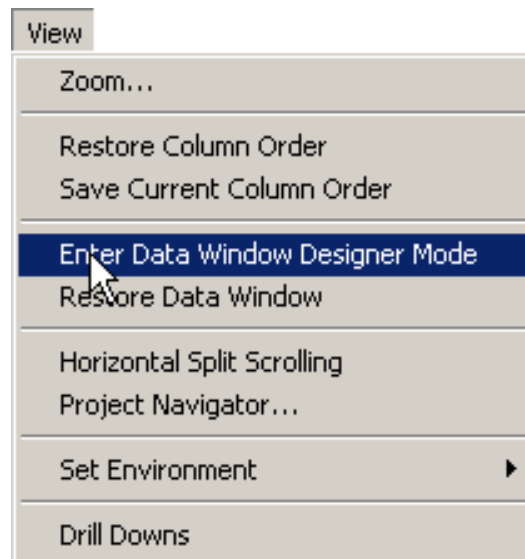
	Labor	Material	
Hours	211.90		
Cost	0.00	294.50	
Profit	0.00	0.00	
G&A	0.00	0.00	
Overhead	0.00	0.00	

Project Description
Sample Ship Repair Project

Sub Totals	0.00	294.50	
Start Date	00/00/0000	Min. Risk	294.50
Finish Date	00/00/0000	Total Cost	294.50
		Max. Risk	294.50
		# of Cost Items	9

Begin using the Data Window Designer by opening the data window (or report) requiring modification.

Then, click on View/Enter Data Window Designer Mode from the main menu.



You will notice that all elements of the data window are re-displayed as distinct modifiable elements.

Project Details Information for the Estimating Environment (Designer Mode)

Details | Options | Milestones | Characteristics

Contraia ID: R-27

Projete ID: 270

	O trabalho	Material
As horas	551,752.50	
O custo	5,517,525.00	9,375,711.92
O lucro	926,944.26	566,058.72
Custos Administrativo	993,154.53	738,337.37
As despesas gerais Custom	2,758,762.50	0.00
Imposto local	0.00	234,392.92
Subtotals	10,196,386.29	10,914,500.93

Projete Descrição

Lead ship (Sample Detail Estimate)

Comece Data	00/00/0000	Custo total	Risco mínimo	21,110,887.22
A Data de acabamento	00/00/0000	21,110,887.22	Risco máximo	21,110,887.22

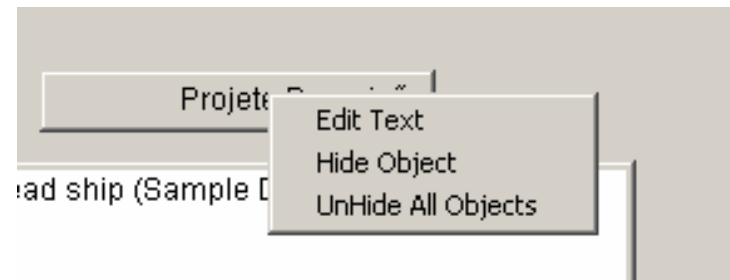
The Data Window Designer has a number of features for modifying the data window:

Moving Data Elements: Position the cursor over the element, press down on the left mouse button and drag the element to the desired new location in the data window.

Re-Sizing Data Elements: Each element can be re-sized by moving the cursor over an edge of the element to display the re-sizing double arrows that appears in lieu of the cursor. When the double arrows appear, press down on the left mouse button and move the edge to the desired new position.

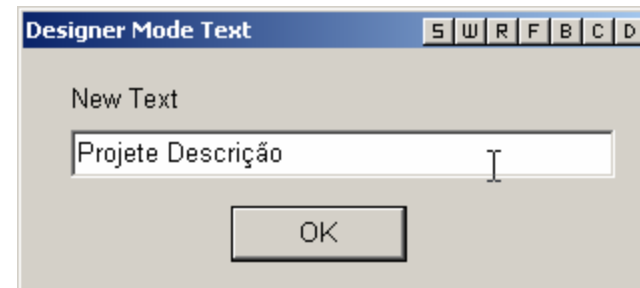
To Edit Element Titles: Position the cursor over the element and press down on the right mouse button. A pop-up menu will display with the following options:

- Edit Test,
- Hide Object, or
- Unhide All Objects



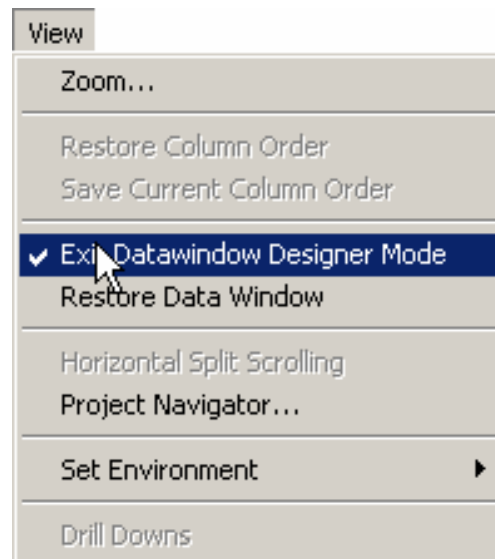
If **Edit Text** is selected, another pop-up window will appear for editing the text of the element.

If **Hide Object** is selected, the element will simply disappear from the data window.



Once all modifications have been made to the data window, click on *View/Exit Data Window Designer Mode* from the main menu.

The original layout of the data window can be restored simply by clicking on *View/Restore Data Window* from the main menu.



Modified Data Window

\$ Project Details Information for the Estimating Environment (Designer Mode)

Details | Options | Milestones | Characteristics

Contract R-27

Project 270

Ship Type CAF

	Labor	Material	Project Description	
Hours	551,752.50		Lead ship (Sample Detail Estimate)	
Cost	5,517,525.00	9,375,711.92		
Profit	926,944.26	566,058.72		
G&A	993,154.53	738,337.37		
Overhead	2,758,762.50	0.00		
Local Tax	0.00	234,392.92		
Federal Tax	0.00	0.00		
Sub Totals	10,196,386.29	10,914,500.93		
Start Date	00/00/0000	Min. Risk		21,110,887.22
Finish Date	00/00/0000	Total Cost		21,110,887.22
		Max. Risk	21,110,887.22	

Modified Data Window (En el español)

Project Details Information for the Estimating Environment			
Details	Options	Milestones	Characteristics
La identificación del contrato	<input type="text" value="R-27"/>		
identificación de Proyecto	<input type="text" value="270"/>		
	El trabajo	la Materia	
Las horas	<input type="text" value="551,752.50"/>		
El costo	<input type="text" value="5,517,525.00"/>	<input type="text" value="9,375,711.92"/>	
La ganancia	<input type="text" value="926,944.26"/>	<input type="text" value="566,058.72"/>	
Los Costos Administrativos	<input type="text" value="993,154.53"/>	<input type="text" value="738,337.37"/>	
El Costo de arriba	<input type="text" value="2,758,762.50"/>	<input type="text" value="0.00"/>	
El impuesto local	<input type="text" value="0.00"/>	<input type="text" value="234,392.92"/>	
Los subtotales	<input type="text" value="10,196,386.29"/>	<input type="text" value="10,914,500.93"/>	
La Fecha del comienzo	<input type="text" value="00/00/0000"/>	El Coste total	<input type="text" value="21,110,887.22"/>
La Fecha del fin	<input type="text" value="00/00/0000"/>	<input type="text" value="21,110,887.22"/>	El Riesgo mínimo <input type="text" value="21,110,887.22"/>
			El Riesgo máximo <input type="text" value="21,110,887.22"/>

Proyete la Descripción

Lead ship (Sample Detail Estimate)

Modified Data Window (En français)

Project Details Information for the Estimating Environment					
Details		Options		Milestones	Characteristics
LA pièce d'identité de contrat		<input type="text" value="R-27"/>			
la pièce d'identité de Projet		<input type="text" value="271"/>			
	in-d'oeuvre	le Matériel			
Heures	<input type="text" value="545,192.02"/>				
Coût	<input type="text" value="5,451,920.20"/>	<input type="text" value="9,375,711.92"/>			
Profit	<input type="text" value="0.00"/>	<input type="text" value="561,745.74"/>			
Les Coûts Administratifs	<input type="text" value="0.00"/>	<input type="text" value="736,778.41"/>			
Coût d'haut	<input type="text" value="2,725,960.10"/>	<input type="text" value="0.00"/>			
Impôt local	<input type="text" value="0.00"/>	<input type="text" value="234,392.92"/>			
Totaux partiels	<input type="text" value="8,177,880.30"/>	<input type="text" value="10,908,628.99"/>			
Date de début	<input type="text" value="00/00/0000"/>	Coût total	Risque minimum	<input type="text" value="19,086,509.29"/>	
Date terminée	<input type="text" value="00/00/0000"/>	<input type="text" value="19,086,509.29"/>	Risque maximum	<input type="text" value="19,086,509.29"/>	

Projeter la Description

Modified Data Window (Auf deutsch)

\$ **Project Details Information for the Estimating Environment**

Details |
 Options |
 Milestones |
 Characteristics

Verkürzen Sie IDENTIFIZIERUNG R-27

PROJEKTIDENTIFIZIERUNG 270

	Arbeit	Material	
Stunden	551,752.50		
Kosten	5,517,525.00	9,375,711.92	
Gewinn	926,944.26	566,058.72	
Allgemeine Administrative	993,154.53	738,337.37	
Hochliegende Kosten	2,758,762.50	0.00	
Örtliche Steuer	0.00	234,392.92	
Zwischensummen	10,196,386.29	10,914,500.93	

Projektbeschreibung

Lead ship (Sample Detail Estimate)

Fangen Sie Datum an	00/00/0000	Gesamte Kosten	
		21,110,887.22	
Beenden Sie Datum	00/00/0000	Mindestrisiko	21,110,887.22
		Maximales Risiko	21,110,887.22

Modified Data Window (Nell'italiano)

\$ Project Details Information for the Estimating Environment

Details | Options | Milestones | Characteristics

L'ID di contratto

l'ID di Progetto

	La mano d'opera	il Materiale
Le ore	<input type="text" value="551,752.50"/>	
Il costo	<input type="text" value="5,517,525.00"/>	<input type="text" value="9,375,711.92"/>
Il profitto	<input type="text" value="926,944.26"/>	<input type="text" value="566,058.72"/>
Generale	<input type="text" value="993,154.53"/>	<input type="text" value="738,337.37"/>
Amministrativo		
In alto il Costo	<input type="text" value="2,758,762.50"/>	<input type="text" value="0.00"/>
La tassa locale	<input type="text" value="0.00"/>	<input type="text" value="234,392.92"/>
I totali parziali	<input type="text" value="10,196,386.29"/>	<input type="text" value="10,914,500.93"/>

Progettare la Descrizione

La Data di inizio	<input type="text" value="00/00/0000"/>	Il Costo totale	<input type="text" value="21,110,887.22"/>	Il Rischio minimo	<input type="text" value="21,110,887.22"/>
La Data di fine	<input type="text" value="00/00/0000"/>		<input type="text" value="21,110,887.22"/>	Il Rischio massimo	<input type="text" value="21,110,887.22"/>

Modified Data Window (In Nederlands)

Project Details Information for the Estimating Environment

Details | Options | Milestones | Characteristics

Trek IDENTIFICATIE samen

Richt IDENTIFICATIE

	Werk	Materiaal
Uur	<input type="text" value="551,752.50"/>	
Kosten	<input type="text" value="5,517,525.00"/>	<input type="text" value="9,375,711.92"/>
Winst	<input type="text" value="926,944.26"/>	<input type="text" value="566,058.72"/>
Algemeen Administratieve	<input type="text" value="993,154.53"/>	<input type="text" value="738,337.37"/>
Hoge Kosten	<input type="text" value="2,758,762.50"/>	<input type="text" value="0.00"/>
Maatselijke Belasting	<input type="text" value="0.00"/>	<input type="text" value="234,392.92"/>
Subtotals	<input type="text" value="10,196,386.29"/>	<input type="text" value="10,914,500.93"/>

Richt Beschrijving

Lead ship (Sample Detail Estimate)

Begin Datum	<input type="text" value="00/00/0000"/>	Totale Kosten	<input type="text" value="21,110,887.22"/>	Minimumrisico	<input type="text" value="21,110,887.22"/>
Beëindig Datum	<input type="text" value="00/00/0000"/>		<input type="text" value="21,110,887.22"/>	Maximaal Risico	<input type="text" value="21,110,887.22"/>

Modified Data Window (Em português)

Project Details Information for the Estimating Environment							
Details		Options		Milestones		Characteristics	
Contraia ID		<input type="text" value="R-27"/>					
Projete ID		<input type="text" value="270"/>					
		O trabalho		Material			
As horas	<input type="text" value="551,752.50"/>						
O custo	<input type="text" value="5,517,525.00"/>	<input type="text" value="9,375,711.92"/>					
O lucro	<input type="text" value="926,944.26"/>	<input type="text" value="566,058.72"/>					
Custos Administrativo	<input type="text" value="993,154.53"/>	<input type="text" value="738,337.37"/>					
As despesas gerais Custom	<input type="text" value="2,758,762.50"/>	<input type="text" value="0.00"/>					
Imposto local	<input type="text" value="0.00"/>	<input type="text" value="234,392.92"/>					
Subtotals	<input type="text" value="10,196,386.29"/>	<input type="text" value="10,914,500.93"/>					
Comece Data		<input type="text" value="00/00/0000"/>		Custo total		Risco mínimo	
A Data de acabamento		<input type="text" value="00/00/0000"/>		<input type="text" value="21,110,887.22"/>		<input type="text" value="21,110,887.22"/>	
						Projete Descrição	
						<input type="text" value="Lead ship (Sample Detail Estimate)"/>	

Managing Business Rules

Each shipyard has a preferred way of doing business. For example, larger yards may require that material requisitions be formally approved before they can be processed for purchase orders. Smaller companies, on the other hand may not want such strict procedures.

PERCEPTION provides a series of operating rules that can be tailored specifically to the way the shipyard wishes to do business.

Click on *System Administration/Managing Business Rules* on the main menu, and the system will display the various rules that can be turned on or off (next slide).

Each of the business rules can be turned on or off by clicking on the *Yes* or *No* options.

Modifiable System Business Rules

- Customer Bills that have been Posted can be deleted
- Bills that are Approved can be edited
- Bills must be Approved before they can be issued to the customer
- Drawings that are Approved can be edited
- BOMs can be deleted from already approved drawings
- Create new location when material is withdrawn from a location that does not exist
- Pallets that are Approved can be edited
- Items can be deleted from already approved pallets
- Drawings must be Approved before they can be referenced on a pallet
- Requisition Items must be Authorized before they can be referenced on a pallet item
- Requisitions must be Authorized before they can be referenced on a pallet
- Purchase Orders that are Approved by Owner can be edited
- Purchase Orders that are Authorized can be edited
- Items can be deleted from already approved Purchase Orders
- Items can be deleted from Purchase Orders that are Authorized by Owner
- Issued Purchase Orders must be Amended before they can be changed
- Purchase Orders must be Authorized before they can be issued
- Purchase Orders must be Approved by Owner before they can be issued
- Requisition Items must be Authorized before they can be purchased
- When the Contract is entered on a new record, the Project is automatically set to the same value
- When an error is encountered on a Recipient List, continue sending to remaining names on list
- Create new location when material is received to location that does not exist
- Requisitions that are Authorized can be edited
- Items can be deleted from already authorized requisitions
- BOMs must be Approved before they can be referenced on a requisition Item
- Drawings must be Approved before they can be referenced on a requisition
- Inform user of Time Card data entry errors before leaving the column.
- Restrict Time Card Posting to Accounting or Production Engineering
- Re-Retrieve the rows after a save - recommend yes
- Show the Database connection, Userid, Environment, and Active Window status bar at the bottom of the screen.
- Validates the data before rows are saved - recommend yes
- Work Orders that are Issued or Complete can still be edited

Once the rules have been determined, click on the *Save* button to store them onto the database and to make them active for subsequent use of the system. These changes take effect immediately and will affect all users of the software.

These business rules are managed by the system administrator, who can modify them by turning them on or off as necessary.