



APMS Training Manual

APMS Professional





This Getting Started section of the APMS Online Training Manual will deal with items that are general to APMS and not specific to any T30 Types. This section will focus on the following:

- [Accessing the APMS Program](#)
- [APMS Menus and Toolbars](#)
- [The APMS Main Screen](#)
- [APMS Program Options](#)
- [APMS Properties](#)
- [APMS Type 30 Queue Maintenance](#)
- [APMS Transaction Database Purge Control](#)
- [APMS Factory Interface](#)

If you have any problems using the APMS Online Training Manual or need assistance with the APMS program, please contact APMS Technical Support at (541) 367-5086.



Accessing the Program

This manual assumes that you already have literacy in the use of a Personal Computer with Windows95, 98 or NT4.0 or higher. You should also be a skilled user in DST Innovis Type 30 Parameters to be able to fully understand the exercises presented in this training session. We will begin by providing a short orientation to the Automated Parameter Management System (APMS) navigation tools as they relate to the Microsoft operating systems and what you may expect to experience in their use.

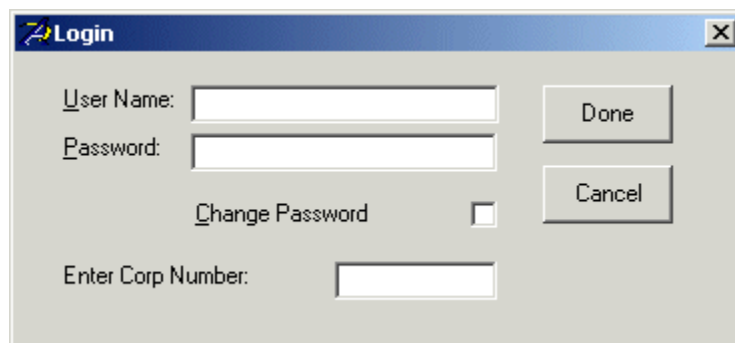
Overview: Windows95, 98, NT4.0 and Windows 2000

APMS installs on your workstation much like any other Windows compatible application that you are familiar with. APMS will install to it's own directory. For ease of use, a shortcut to APMS can be set up to provide point and click access from the desktop.



Security and Accessing T30's

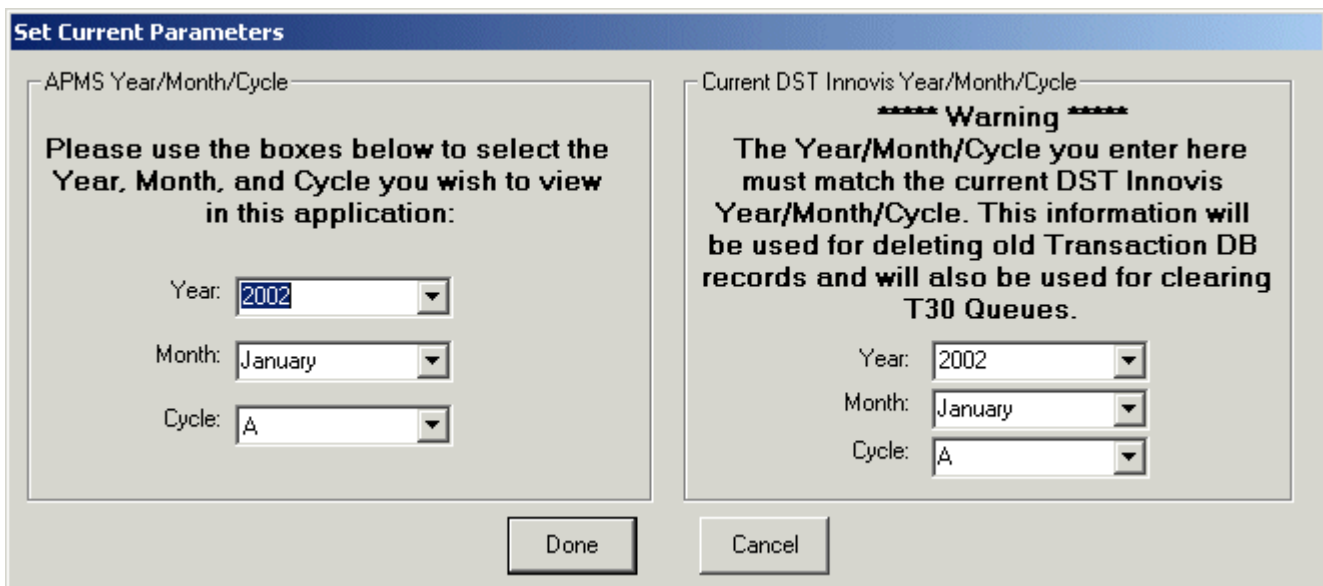
An administrator controls access to the APMS application. Each user needs to be authorized for access through a login process that is controlled by the designated administrator. The administrator will define your "User Name" and initial "Password". You have an option to "Change Password" whenever you feel that it is necessary to preserve the integrity of the changes made under your User Name. All Adds, Deletes, and Changes are recorded to the APMS Change Log by User Name.

A screenshot of a Windows-style dialog box titled "Login". The dialog box has a blue title bar with a close button (X) in the top right corner. It contains the following elements: a "User Name:" label followed by a text input field; a "Password:" label followed by a text input field; a "Change Password" label followed by an unchecked checkbox; and an "Enter Corp Number:" label followed by a text input field. On the right side of the dialog, there are two buttons: "Done" and "Cancel".

When you enter your User Name and password, you will also be prompted to enter the Corp Number for the system you want to access. Upon entry to the APMS program, a check will be made to verify that the user entering APMS has access to the requested corp.

If the user has permission to enter the corp, the program will continue on to the next login step. If the corp being accessed is not setup for the user to access, a message will display informing the user that they are not setup for the corp.

The Set Current Parameters window is presented to allow you to choose the Year, Month, and Cycle for which you want to update parameters and the Current DST Innovis Year/Month/Cycle. Use the appropriate drop-down lists to make your selections.



Set Current Parameters

APMS Year/Month/Cycle

Please use the boxes below to select the Year, Month, and Cycle you wish to view in this application:

Year: 2002

Month: January

Cycle: A

Current DST Innovis Year/Month/Cycle

****** Warning ******

The Year/Month/Cycle you enter here must match the current DST Innovis Year/Month/Cycle. This information will be used for deleting old Transaction DB records and will also be used for clearing T30 Queues.

Year: 2002

Month: January

Cycle: A

Done Cancel

The Current DST Innovis Year/Month/Cycle can be different than the Year/Month/Cycle that you are making changes for. APMS needs to know which cycle you are making changes for and what the current DST Innovis cycle is. This information is used in managing the data and transactions that are saved in the APMS Transaction Database and the Type 30 Queue Maintenance program.

- ❑ Paste – This feature is not available and is currently being re-evaluated. If you have any questions about this function’s availability, please contact APMS Technical support.
- ❑ Add Record – For multiple-row Type 30 parameters, such as the Rate Table and the Reporting Center Table, adds a new row to the table.
- ❑ Delete Record – For multiple-row Type 30 parameters, deletes the record from the table. You can also use the ‘-’ button on the tool bar to delete a record.
- ❑ Comments – Opens the Comments window so that you can review or enter comments about a parameter.

Note: All of the functions in the Edit Menu are also available from the Tool Bar.

View

The View menu contains the following items:

- ❑ Tool Bar – Turns the tool bar at the top of the screen on or off.
- ❑ Status Bar – Turns the status bar at the bottom of the screen on or off.
- ❑ Changed Data – Highlights the parameters that you have changed for the month/cycle that you are accessing.
- ❑ Cycle Selector – Displays the Set Current Parameters window so that you can specify a new cycle for updating.
- ❑ Options – Use this option to specify preferences for the APMS program, such as default settings when you start the program and how the record grids appear.

Tools

The Tools menu contains the following items:

- ❑ Spell Checker – This option is no longer used for spell checking in the T20 Messages. T20 message text can be spell checked using the Spell Check button in the T20 Message Add/Edit box.
 - ❑ T30 Interface – Opens the Factory Interface window so you can upload your Type 30 parameter changes to the Tandem at Output Technology Solutions.
 - ❑ Database Administrator – Allows the administrator the options for defining users, adding databases, setting security levels, and printing a report of the people authorized to use the program. This option is available only if you log in to the program using a System Administrator or higher access.
 - ❑ Database Utilities – Compresses or repairs the APMS databases. When you choose this, the program displays a window so that you can choose the database, and whether you want to Compact or Repair the database or both.
 - ❑ Update Software – Use this option to link to Concise Solutions web site so that you can download updates. When you choose this option, the program launches your web browser and directs it to the download area.
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- ❑ Statement Presentation – Use this option to see how a sum code and its related extensions print on a customer's statement. You must first choose a sum code from Type 30-09 (Sum Codes and Extensions) to use this option.
- ❑ ParaCompare – An optional additional program that allows you to compare your DDP Financial parameters to the parameters set up in DDP/SQL. You can choose to compare rate codes, reporting centers, or adjustment reasons.
- ❑ T30 Queue Maintenance – Use this option to review and accept Type 30 parameter changes.
- ❑ Find a Rate Code – Use this option to display parameters on specific rate codes.
- ❑ Copy Corp Files – Use this option to create a play corp for your users with existing data from a live corp. This option is available only if you log in to the program using a System Administrator or higher access.

Help

Use the options on the Help menu to access online Help on APMS and version information.

Toolbar Buttons

While you are working with a Type 30 parameter, the following buttons on the tool bar are available:



Open - Opens a new Database.



Save - This option is unavailable. APMS saves your changes when you click OK when adding a parameter, or when you click outside the field when changing a parameter.



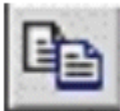
Reports - Opens the Reports dialogue box.



Undo - This function is not now available, and is being reevaluated. If you have any questions about this function's availability, contact APMS Technical Support.



Cut – cuts message text in Type 30-20 (Statement Messages).



Copy – copies messages set up in Type 30-20 (Statement Messages) and text you enter in Type 30-16 (Rate) Table for all formats.



Paste – pastes message text in Type 30-20 (Statement Messages).



Sort - The program displays a window that you use to choose the column for the sort. When you select a column, the program bases the sort on the data in the column you chose.



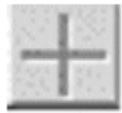
Select - Select certain records from a table. For example, use this to select all rate codes using Reporting Center 03. The program displays a window that you use to choose the column for the select, and the value you want to select on. Then the program highlights the records you specified.



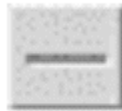
Clear Select - Deselect the records you previously selected.



Changed Records – Select (or highlight) the records that you have changed for the month and cycle that you are accessing.



Add Record - Add a record to a table. The program displays a window for you to specify certain values for the record. Refer to the section on working with the Type 30 parameter for details.



Delete Record - Delete a record from a table. Position the cursor in the record you want to delete. Click this button to delete the record. The program performs certain internal edits, and displays a warning message if the parameter is used by other Type 30 parameters. For example, if you try to delete a sum code extension, the program ensures it is not assigned to any sum codes. APMS stores deleted records for up to five parameter changes.



Add Comment – Position the cursor in the record you want to add comments to, and click this button. The program displays a window in which you can enter a free-form comment. You can also press F3 to have the program insert a date-time stamp. You can print a comment report through the Cross-Reference reports option.



Edit Message Text – Opens the Type 30-20 (Statement Messages) message text window so that you can enter or change the text of a message.



Find Rate Code – Displays the Find Rate Code window. Choose the rate code you want to access through the drop-down menu, and also specify if you want to view it in the single-entry screen, or in the Type 30-16 grid.



Add Available Rate Code – Will provide the user a list of all Rate Codes. Within this list, any rate code that is used will display with its description. This allows the user to determine which codes are in use. Any unused Rate Code can be selected from this window to be added to any format of Rate Code.



Print Selected Items – Allows the user to print a setup report of codes highlighted in any All Record Grid in APMS. Type 30 types that display in a Tab Format cannot use this option.

Type 30 Module Buttons

Each Type 30 module contains buttons such as OK, Cancel, and Apply.

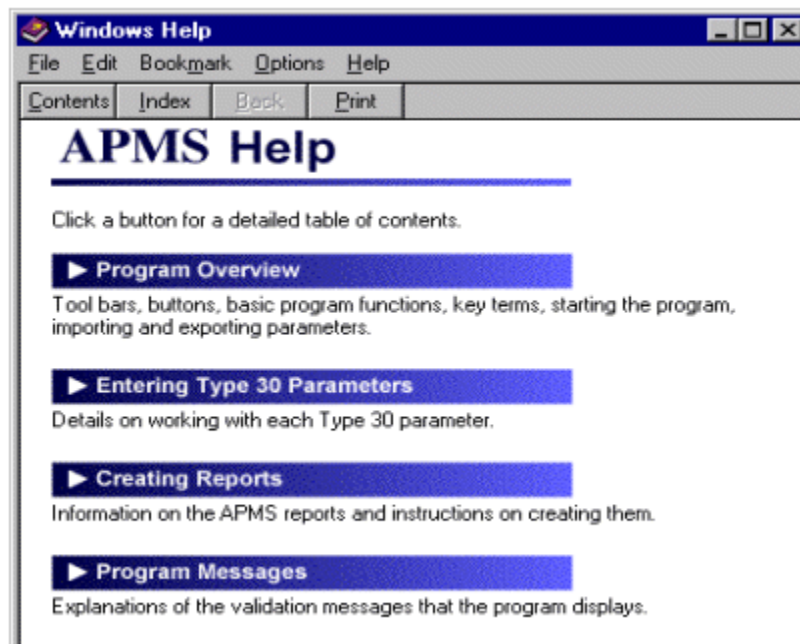
- **OK** and **Cancel** – These two buttons display when a Type 30 module has a single form with no tabs and no continuing screens. **OK** implements the change; **Cancel** leaves the form without implementing the change.
 - **OK, Apply, and Cancel** – These three buttons display when a Type 30 module has a single form with multiple tabs and continuing screens. **OK** implements the outstanding changes and closes the form. **Apply** implements the changes made up to that point but does not close the form. **Cancel** leaves the form without implementing any changes since the last time you pressed **Apply**.
 - **Back, Next, Cancel, and Finish** – These four buttons display when a Type 30 has multiple screens. **Back** returns you to the previous screen. **Next** advances you to the next screen. **Cancel** leaves the form(s) without making any changes. **Finish** goes to the end of the screens using the default values for the intermediate screens.
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Shortcut Keys

When accessing a Type 30 parameter, you can use the following keys to navigate:

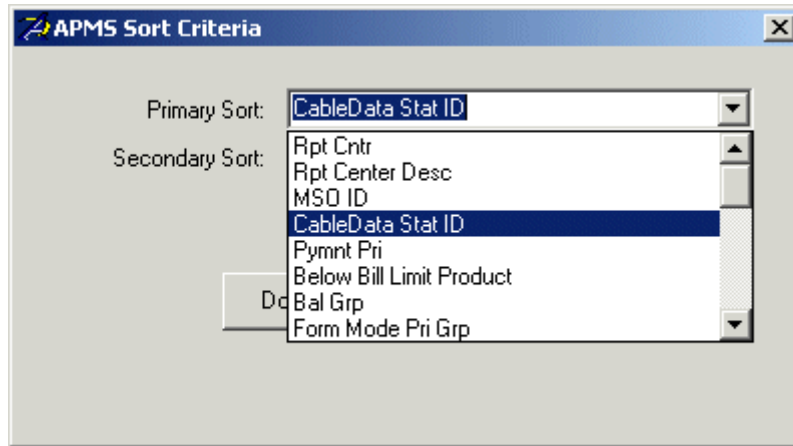
- ❑ tab key - Moves the cursor one cell to the right.
- ❑ Shift+tab key - Moves the cursor one cell to the left.
- ❑ arrow key - Moves the cursor in the direction of the arrow key.
- ❑ Page Up key - Moves the cursor up one page.
- ❑ Page Down key - Moves the cursor down one page.
- ❑ Home key - Moves the cursor to the first column in the table (or the split if the table is split).
- ❑ End key - Moves the cursor to the last column in the table (or the split if the table is split).
- ❑ Ctrl+Home key - Same as Home key, but positions the current row at the first row in the table.
- ❑ Ctrl+End key - Same as End key, but positions the current row at the last row in the table.
- ❑ Alt+down arrow key - Drops down the list box. Use the mouse or arrow keys to navigate within the drop-down list. (You can also left-click on the drop-down list's down arrow to display the drop-down list.)

Special Function Keys

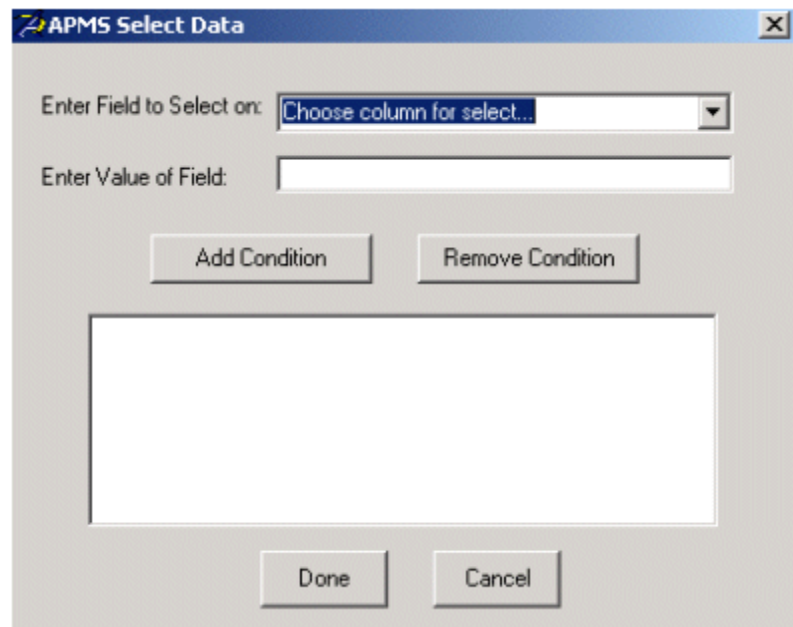


- ❑ **F1 – Access Help.**
 - ❑ **F2 – Enter edit mode** when the cursor is in a description field. This changes the cursor to an insertion point so that you can edit the text in the field.
 - ❑ **F3 – Insert a time stamp** when the cursor is in the Comment field.
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- **F4 – Sort data in a parameter.** The program prompts you for the column to sort on, and then sorts the grid based on the values in the column.



- **F5 – Find or select a parameter value.** This brings up a window where you specify the column you want to search or select on, and the value you want to find or select. The program then highlights all records matching your criteria.



Key Terms

CHANGE REQUEST FORMS – Reports resembling set-up reports with additional flags indicating parameters you have changed and those you have set to delete.

CROSS-REFERENCE REPORTS – Reports providing further details on your parameters for research. You choose from the following types: parameters used and not used, parameters associated with other parameters (for example, the rate codes associated with each reporting center), or comments about the parameters.



APMS SOURCE DATABASE – The database containing information that the APMS program uses to accept your changes, display the parameters, and generate reports.

CORP TRANSACTION DATABASE – The database containing your changes to your parameters. When you request a change request form, the program prints formatted records from the transaction database.

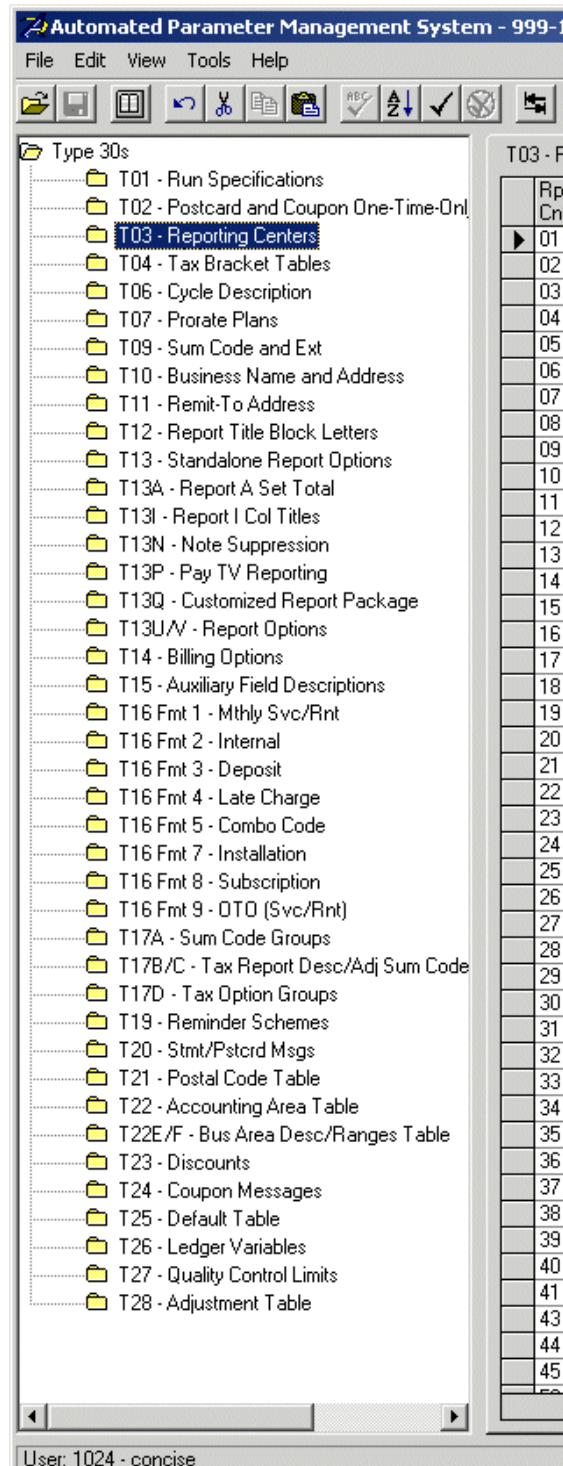
VALIDATION DATABASE – The database containing default values for the Type 30 parameters, as well as valid entries for each field. When you access a field with a drop-down menu, the program reads this database for the values to display.

CORP DATA DATABASE – Contains the Type 30 parameter values specific to the DST Innovis corp.



APMS Main Screen

Type 30 Parameters Drop Down



Automated Parameter Management System - 999-1

File Edit View Tools Help

Type 30s

- T01 - Run Specifications
- T02 - Postcard and Coupon One-Time-Onl
- T03 - Reporting Centers**
- T04 - Tax Bracket Tables
- T06 - Cycle Description
- T07 - Prorate Plans
- T09 - Sum Code and Ext
- T10 - Business Name and Address
- T11 - Remit-To Address
- T12 - Report Title Block Letters
- T13 - Standalone Report Options
- T13A - Report A Set Total
- T13I - Report I Col Titles
- T13N - Note Suppression
- T13P - Pay TV Reporting
- T13Q - Customized Report Package
- T13U/V - Report Options
- T14 - Billing Options
- T15 - Auxiliary Field Descriptions
- T16 Fmt 1 - Mthly Svc/Rnt
- T16 Fmt 2 - Internal
- T16 Fmt 3 - Deposit
- T16 Fmt 4 - Late Charge
- T16 Fmt 5 - Combo Code
- T16 Fmt 7 - Installation
- T16 Fmt 8 - Subscription
- T16 Fmt 9 - OTO (Svc/Rnt)
- T17A - Sum Code Groups
- T17B/C - Tax Report Desc/Adj Sum Code
- T17D - Tax Option Groups
- T19 - Reminder Schemes
- T20 - Stmt/Pstord Msgs
- T21 - Postal Code Table
- T22 - Accounting Area Table
- T22E/F - Bus Area Desc/Ranges Table
- T23 - Discounts
- T24 - Coupon Messages
- T25 - Default Table
- T26 - Ledger Variables
- T27 - Quality Control Limits
- T28 - Adjustment Table

T03 - F

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User: 1024 - concise

Once you have selected the cycle and the database, a drop-down list of parameters is displayed to give you access to the Type 30 options for add, change, or delete. By selecting a specific type 30 option, that option is displayed and available for your use.

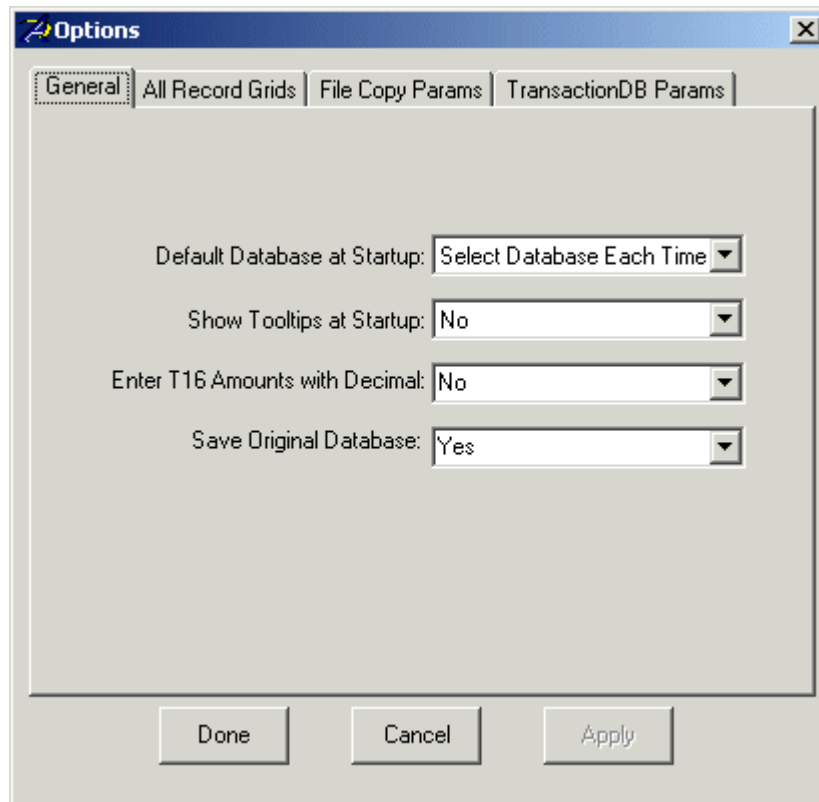
Status Bar



The Status Bar displays at the bottom of the screen. It always contains the following information: The Type 30 parameter you currently have open, the month, year, and code of the cycle for which you are updating Type 30 parameters, and the current date and time. Depending on the Type 30 you are accessing, additional information displays in this line. Refer to the topic on the specific Type 30 for additional information.

Program Options

Use the Options window from the View menu to specify preferences for the APMS program, such as default settings for startup and how the All Records tabs appear.



General Tab

Use these parameters to specify default settings for startup.

Default Database at Startup - Use this field to choose the default database: the last database you accessed or a new one you select.

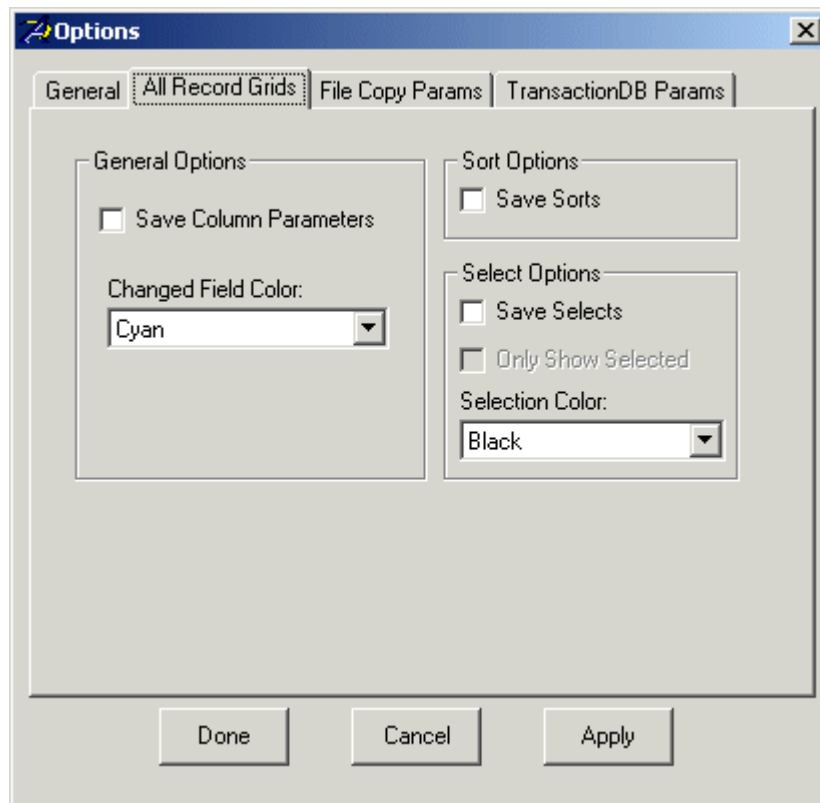
Show Tooltips at Startup - Use this field to show or not show the Tip of the Day window when you start the program.

Enter T16 Amounts with Decimal - Use this field to specify if you will enter the T16 Rate Amount with or without a decimal. As an example:

If you have this field set to No, an entry of 500 in a Rate Amount field will become \$5.00.

If you have this field set to “Yes”, an entry of 500 in a Rate Amount field will become \$500.00.

Save Original Database – Use this field to create a back up copy of the files you are opening when you select a corp to access in APMS. This feature creates duplicate Corp Data and Transaction Databases on the server upon opening of the corp.



All Record Grids Tab

Use these parameters to customize the appearance of multiple-row parameters, such as the Rate Table and the Reporting Center table.

Save Column Parameters – Select this option to have the program retain your changes to a record grid, for example, if you change the sizes of the columns

Changed Field Color – Use this field to specify the highlight color for changed fields.

Sort Options: Save Sorts – Select this option to have the program retain your sorts of record grids.

Select Options: Save Selects – Select this option to have the program retain your selects

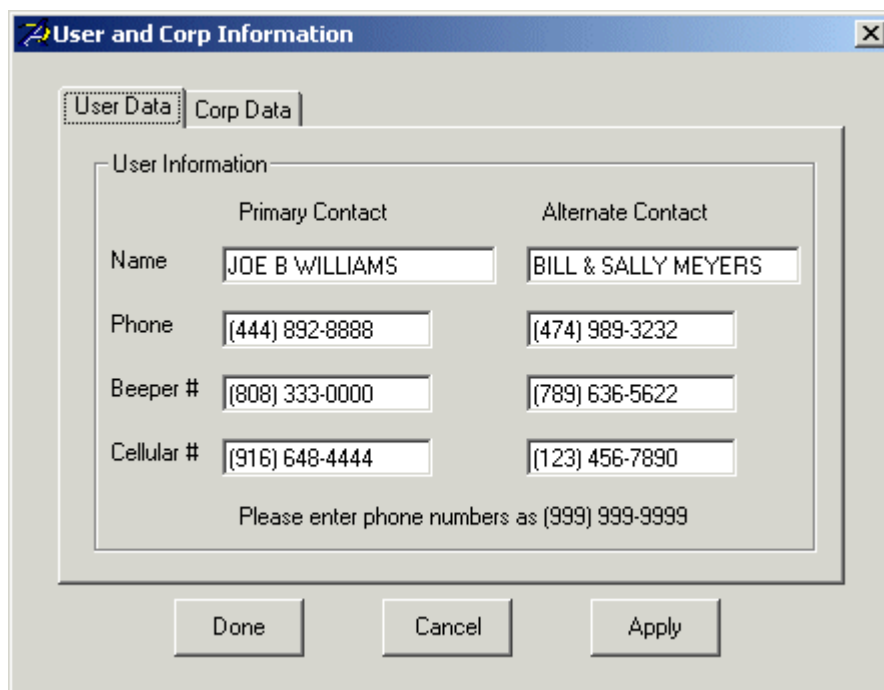
Selection Color – Use this field to specify the highlight color for selected records.

APMS Properties

Use the Properties window from the File menu to specify user information, and information about the parameters you are entering.

User Data

Use this tab to enter your name, an alternate contact name, and telephone and beeper numbers.



The screenshot shows a dialog box titled "User and Corp Information" with a close button (X) in the top right corner. It has two tabs: "User Data" (selected) and "Corp Data". The "User Data" tab contains a "User Information" section with two columns: "Primary Contact" and "Alternate Contact". Each column has four text input fields for "Name", "Phone", "Beeper #", and "Cellular #". Below the input fields is a note: "Please enter phone numbers as (999) 999-9999". At the bottom of the dialog are three buttons: "Done", "Cancel", and "Apply".

	Primary Contact	Alternate Contact
Name	JOE B WILLIAMS	BILL & SALLY MEYERS
Phone	(444) 892-8888	(474) 989-3232
Beeper #	(808) 333-0000	(789) 636-5622
Cellular #	(916) 648-4444	(123) 456-7890

Please enter phone numbers as (999) 999-9999

Corp Data

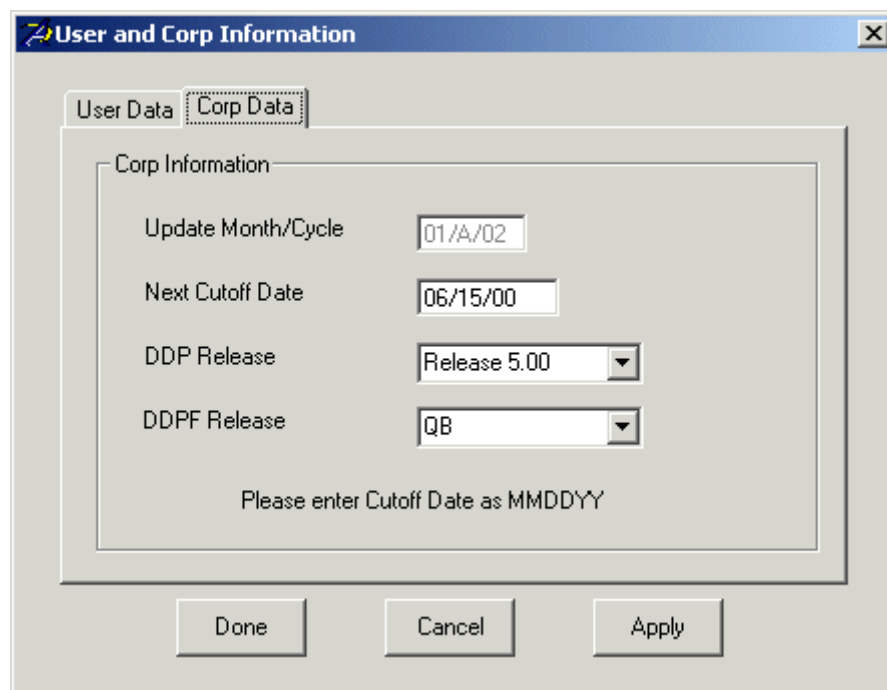
Use this tab to specify information about the DDPF update run that you are entering parameters for.

Update Month/Cycle – The program displays the month, cycle, and year you chose in the Set Current Parameters window when you started the program.

Next Cutoff Date – Enter the default date for the change request forms. When you create a change request form, you can use this date or specify another.

DDP Release – If needed, choose a new release number. Use caution when changing this value, since it controls edits that the APMS program uses when verifying your parameter entries. If you set this to an incorrect value, you could have database problems during your next DDP-F update.

DDPF Release – If needed, choose a new DDPF Release. This field will control aspects of corp specific DDPF Data (i.e. changing from Release QB to Release RA will give Tennessee Users the ability to enter the T22M Graduated Tax data).

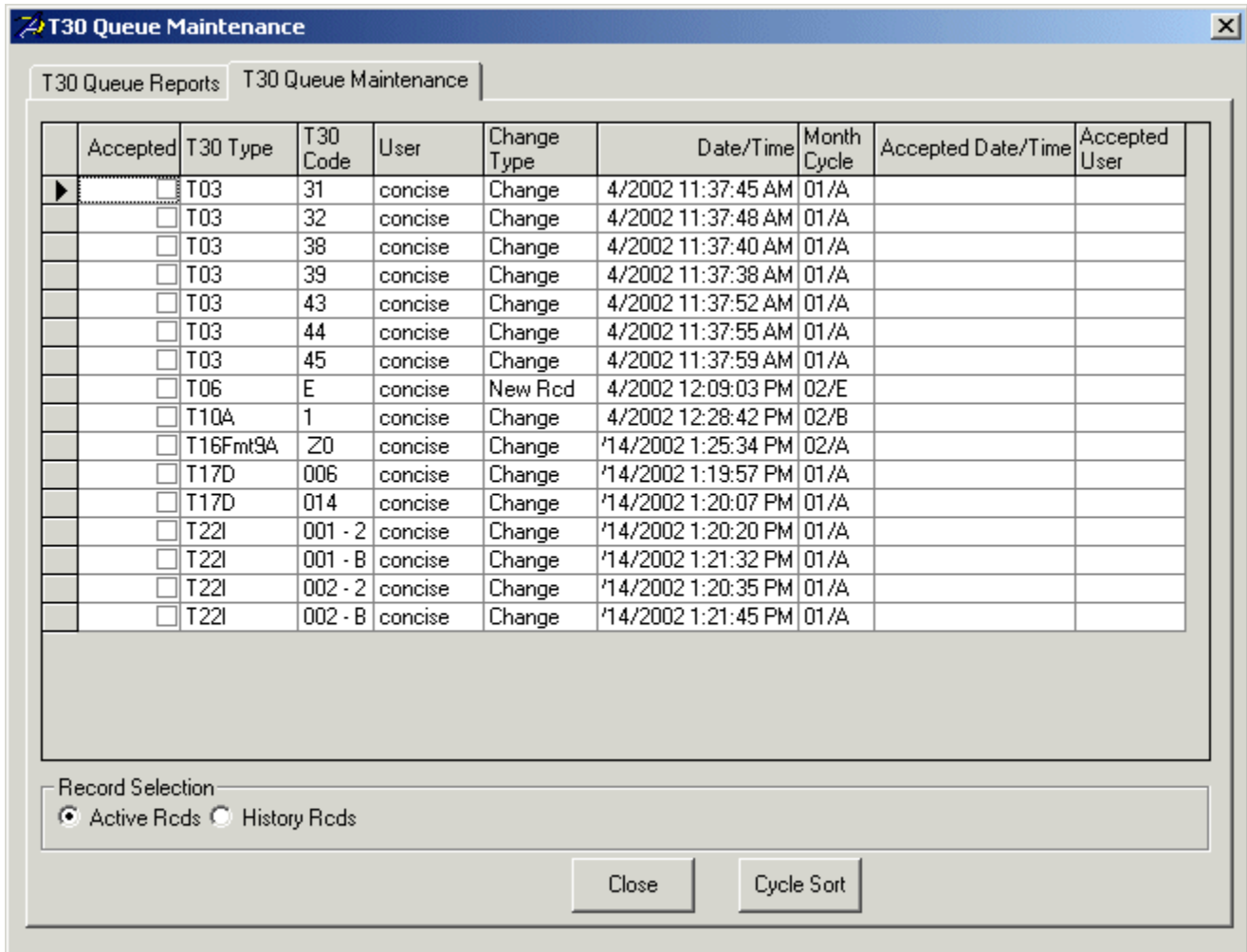


The screenshot shows a dialog box titled "User and Corp Information" with a close button in the top right corner. It has two tabs: "User Data" and "Corp Data", with "Corp Data" being the active tab. Inside the "Corp Data" tab, there is a section titled "Corp Information" containing four fields: "Update Month/Cycle" with the value "01/A/02", "Next Cutoff Date" with the value "06/15/00", "DDP Release" with a dropdown menu showing "Release 5.00", and "DDPF Release" with a dropdown menu showing "QB". Below these fields is a note: "Please enter Cutoff Date as MMDDYY". At the bottom of the dialog box are three buttons: "Done", "Cancel", and "Apply".

APMS Type 30 Queue Maintenance

When you select T30 Queue Maintenance from the Tools menu, the program displays two tabs:

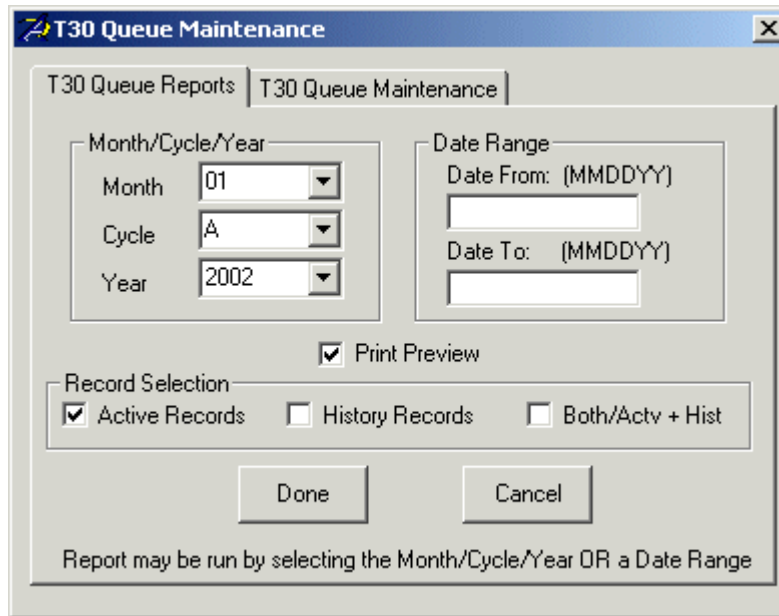
T30 Queue Maintenance - Use this tab to verify and accept Type 30 changes.



Accepted	T30 Type	T30 Code	User	Change Type	Date/Time	Month Cycle	Accepted Date/Time	Accepted User
<input type="checkbox"/>	T03	31	concise	Change	4/2002 11:37:45 AM	01/A		
<input type="checkbox"/>	T03	32	concise	Change	4/2002 11:37:48 AM	01/A		
<input type="checkbox"/>	T03	38	concise	Change	4/2002 11:37:40 AM	01/A		
<input type="checkbox"/>	T03	39	concise	Change	4/2002 11:37:38 AM	01/A		
<input type="checkbox"/>	T03	43	concise	Change	4/2002 11:37:52 AM	01/A		
<input type="checkbox"/>	T03	44	concise	Change	4/2002 11:37:55 AM	01/A		
<input type="checkbox"/>	T03	45	concise	Change	4/2002 11:37:59 AM	01/A		
<input type="checkbox"/>	T06	E	concise	New Rcd	4/2002 12:09:03 PM	02/E		
<input type="checkbox"/>	T10A	1	concise	Change	4/2002 12:28:42 PM	02/B		
<input type="checkbox"/>	T16Fmt9A	Z0	concise	Change	'14/2002 1:25:34 PM	02/A		
<input type="checkbox"/>	T17D	006	concise	Change	'14/2002 1:19:57 PM	01/A		
<input type="checkbox"/>	T17D	014	concise	Change	'14/2002 1:20:07 PM	01/A		
<input type="checkbox"/>	T22I	001 - 2	concise	Change	'14/2002 1:20:20 PM	01/A		
<input type="checkbox"/>	T22I	001 - B	concise	Change	'14/2002 1:21:32 PM	01/A		
<input type="checkbox"/>	T22I	002 - 2	concise	Change	'14/2002 1:20:35 PM	01/A		
<input type="checkbox"/>	T22I	002 - B	concise	Change	'14/2002 1:21:45 PM	01/A		

Record Selection
 Active Rcds History Rcds

T30 Queue Reports - Use this tab to print reports of Type 30 changes.



Verifying and Accepting Type 30 Changes

Click the T30 Queue Maintenance tab. On this tab, the program displays the following:

- ❑ the Type 30 type that was changed
- ❑ the Type 30 code where applicable, for example, '30' for a change to Reporting Center 30
- ❑ the name of the operator who made the change
- ❑ the type of change (new record, deleted record, changed record)
- ❑ the date and time of the change

After verifying a change, click in the Accept column. The program removes this queue entry from the screen and writes the Type 30 change to the History file along with the date and time you accepted the change, and your name.

Use the Record Selection button to choose whether to display the pending records in the queue or the accepted records in the History file. If you choose History file records, the program prompts you to enter the date range for when the change was made.

Note: If the Factory Interface finds any unaccepted Type 30 changes for the corp, month, cycle, and year, it halts and does not transmit any parameter changes to OTS.



Printing Type 30 Changes

Click the T30 Queue Reports tab. You can either choose a month, cycle, or year for the report, or enter a date range for when the change was made. Check the Print Preview box if you want to display the report. Finally, choose one of the following types of records for the report:

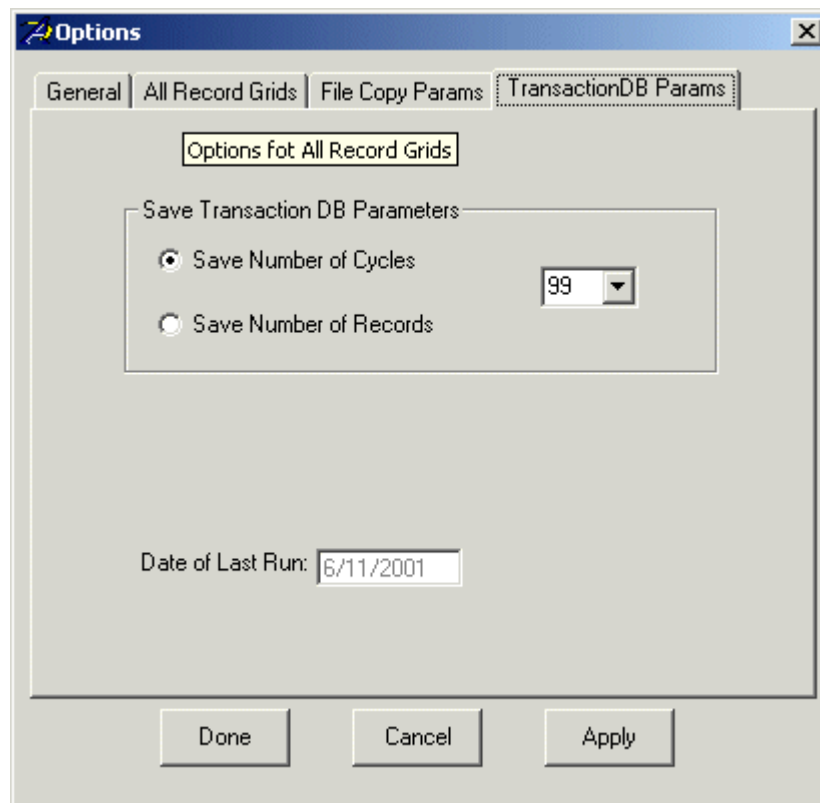
- Active Records - Print only those records still in the Type 30 Queue
- History Records - Print accepted records that are in the History file
- Both/Actv + Hist - Include both types of records in the report.

Click **OK** to print the report; **Cancel** to exit the window without printing the report.



APMS Transaction Database Purge Control

APMS allows the user to go forward or backward to specific cycle to not only control the parameters in the future but to allow research into changes made in the past. As a result the amount of information stored in the Transaction Database can become quite large over a period of time. Transaction Database Purge Control allows you to delete (purge) old historical entries from the Transaction Database.



- Upon entry into APMS, the user is not only asked for the month/cycle they want to work in, but also the current DST Innovis month/cycle for the corp.
- Once in APMS, access the View/Options menu. In this Options box, there is a tab called TransactionDB Params. On this tab, select how you want to handle the database historical purge. You have the option of deleting records that are 'so many' month/cycles in the past or deleting old records to keep them under a limit of how many records they choose to keep. Concise Solutions recommends the 'number of cycles' option.

Upon closing APMS, the corp transaction database will be compared to the settings for purging historical entries and remove any that meet the criteria setup.

Note: This is a secured option. The default settings are to save records for 99 Cycles. If you want to change these setting, please contact Concise Solutions APMS Technical Support.



APMS Factory Interface

Access the T30 Interface option from the Tools menu to update the Tandem at Output Technology Solutions with your parameter changes.

Before accessing this option, use T30 Queue Maintenance from the Tools menu to verify and accept your parameter changes. If the Factory Interface finds any unaccepted Type 30 changes for the corp, month, cycle, and year, it halts and does not transmit any parameter changes to OTS.

Notes:

- ❑ The Factory Interface field must be set to “Yes” to use the Factory Interface. This field is in the Options window from the View menu.
- ❑ The first time you access this option you must set up certain parameters. Please contact Concise Solutions APMS Technical Support to verify the setup of the Factory Interface program.

When you access this option, the Factory Interface window displays. The display-only fields in this window show your ID as an Online Type 30 Parameters user, your corp number, and the month, year, and cycle of the parameters you are transmitting. The program uses the bottom line of this window to display status messages during the update.

After you click Begin, the program does the following:

1. Creates an audit log file, giving it a name in the format Auditlog_yymmddhhmm.txt, where yy is the year, mm is the month, dd is the day, hh is the hour and mm is the minute the file was created.
 2. Creates an export file, giving it a name in the format cmm#####, where c is the cycle, mm is the month and ##### is your corp number.
 3. Establishes a PPP (point-to-point protocol) connection to the Tandem at Output Technology Solutions (OTS), and transmits the file.
 4. A program running on the Tandem at OTS recognizes when the file has been completed through the PPP connection and automatically initiates the program that merges the Type 30 data from APMS into the Tandem Type 30 file. As the Type 30s are being merged, a Transaction Log file (TL file) is being created that shows the progress of the Type 30's during processing.
 5. After a set amount of time, the Factory Interface program will contact the Tandem at OTS through the PPP connection and will attempt to locate the completed TL file. Once the completed TL file is located, the program
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will copy it back to the user's PC. From this file, the program will display onscreen whether or not the merging of the T30 data completed successfully.

Note: If the program encounters a problem when transmitting your parameters to OTS, it writes the error to the audit log. This helps Customer Care personnel in diagnosing and fixing the problem.

