

# Three ways to set up SMS operation record (Document)

According to the different execution methods, it is divided into three ways: **Smart Template, Online Editing, and Uploading Attachments**. Among them, the smart template is suitable for the situation that the form content is filled in with a large text, and only the approval comment needs to be filled in the subsequent approval stage. For the situation that the number of forms is large, the content is complex and the number of rows is not fixed, it is not recommended to use the smart template. This kind of form is more suitable for online editing or uploading attachments. Because the smart template cannot increase the number of rows in the form when filling, it will affect the flexibility and efficiency of filling.

## 1. Smart Template

After the user logs in the the OLISS Web side, click "SMS Task Setting", then click "Add", enter the Add interface, select "regular" or "irregular" as needed, fill in the basic information (with \* required), and click "Next" to set the template.

The screenshot shows the OLISS Web interface. The top header includes the company logo (互海科技), a search bar, and user information (Workbench: 20984, Vessel Monitor, Find, Switching System, EN, 朱慧). The left navigation menu includes SMS Management, SMS Files, Audits Management, Security Check, Operation Record, SMS Task, SMS Task Setting (highlighted with a red box and arrow labeled "1. Click 'SMS Task Setting'"), SMS Archive, Customs Affairs Management, Vessel Incident Records, Address Book, and E-Signature. The main content area is titled "SMS Task" and "SMS Task Setting". It features a table with columns: No., File No., Table No., Table Name, Record Time, Vessel Name, Receiving Dept, Effective Time, Upload Perio..., P.I.C of U, and Operation. The table contains several rows of data. Above the table, there are buttons for "Add", "Import", "Export", "Set Expiration Date", and "Copy Vessel". A red arrow labeled "2. Click 'Add'" points to the "Add" button. At the bottom of the page, there is a pagination bar showing "650 Total", "10Total/Page", and a page number selector set to "1".

No.	File No.	Table No.	Table Name	Record Time	Vessel Name	Receiving Dept	Effective Time	Upload Perio...	P.I.C of U	Operation
0	000	cx003-01	新聘和转岗洋葱基 人员职责熟悉记 录表		LINK OCEAN 1		2020-11-09	1Month	船长	Edit   Delete   Off
0	001001	001001-1	船舶SMS报告 (智能模板2.0)		LINK OCEAN ...		2024-01-01	1Month	船长	Edit   Delete   Off
0	0101	0101	船舶SMS检查报 告 (智能模板)		LINK OCEAN ...	体系办	2024-11-14	Irregular	船长	Edit   Delete   Off
0	0101	HH0101990	互海测试管理表 格		LINK OCEAN 1		2024-08-08	Irregular	船长	Edit   Delete   Off
0	06101	01229	船舶SMS报告		LINK OCEAN ...		2024-01-01	Irregular	船长	Edit   Delete   Off
0	091101	091101	excel091101		LINK OCEAN 1		2024-09-11	1Month	采购专员	Edit   Delete   Off

Add ✕

Regular Irregular → 3.select "regular" or "irregular" as needed 4.Fill in the basic information (with \* required)

Basic Info. Template Settings Workflow Settings

<b>File No. *</b> Please enter	<b>Table No. *</b> Please enter	<b>Table Name *</b> Please enter	<b>No. *</b> (The Smaller, The Closer) 0
<b>Effective Time</b> 2024-12-12	<b>Upload Period(Month) *</b> Please enter	<b>Record Time</b> Please enter	<b>Receiving Dept</b> Please enter
<b>Remarks</b> Please enter			
<b>Associated SMS Files</b> Please select SMS files.			
<b>Vessel Name *</b> <input type="checkbox"/> Select All <input type="button" value="Add"/>			

5.Click "Next" to set the template

Smart Template is divided into 2.0 and 1.0 versions:

## (1) Smart Template 2.0


Select "Smart Template 2.0", without modifying the document template, directly click on the upload template (only support .docx format). Click the fill area, right-click to select the appropriate control to insert and then select properties of the field on the right. After all the field setting controls are completed, click "Next" to set the workflow.

Add ✕

Regular Irregular 6.Select "Smart Template 2.0", without modifying the document template, directly click on the upload template (only support .docx format)

Basic Info. Template Settings Workflow Settings Tips: If template setup is skipped, execution can only be completed by uploading attachments.

Execution Method: Smart Template2.0



Please upload the template first. It supports DOCX format.

Click or Drag The File Here to Upload

Execution Method: Online Editing

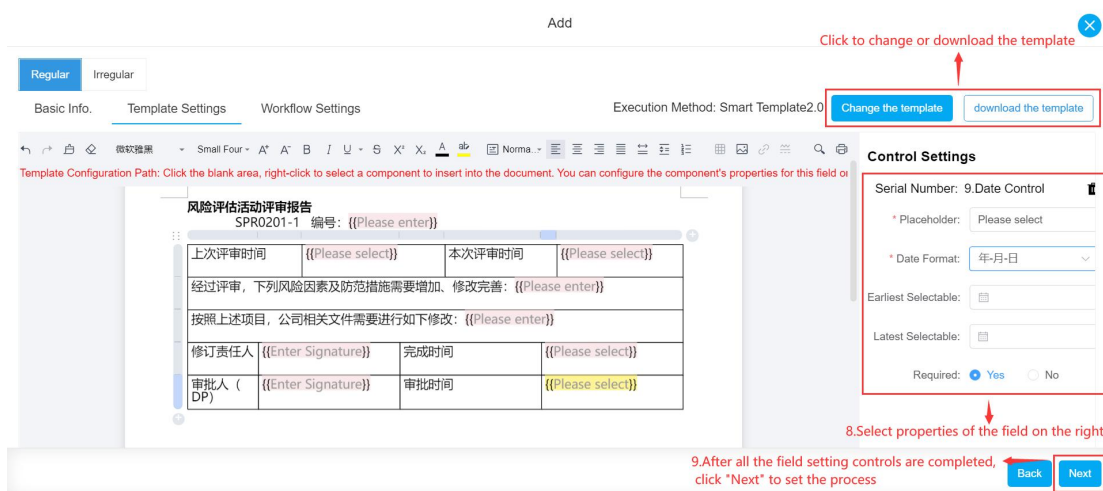
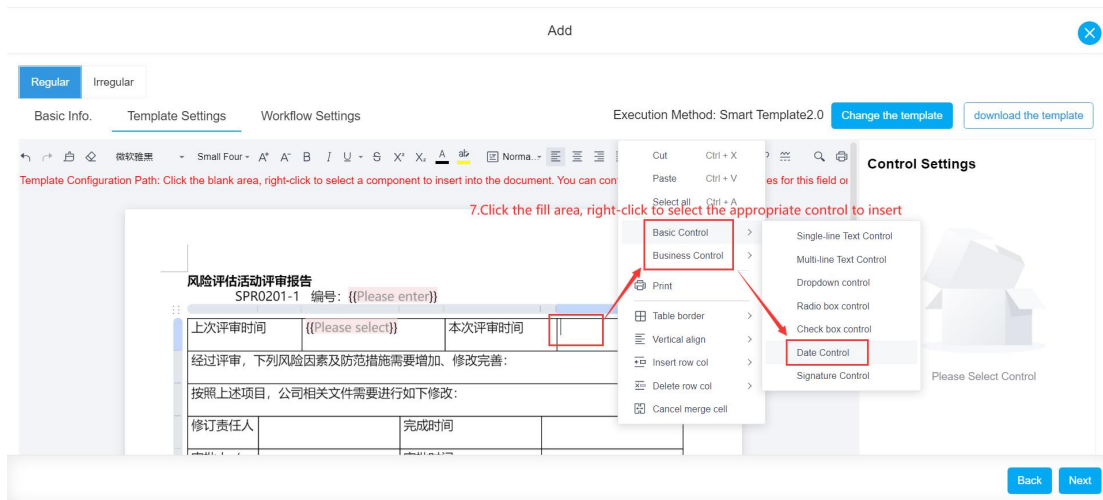
**SMS Files**

File Name	Operation
N/A	

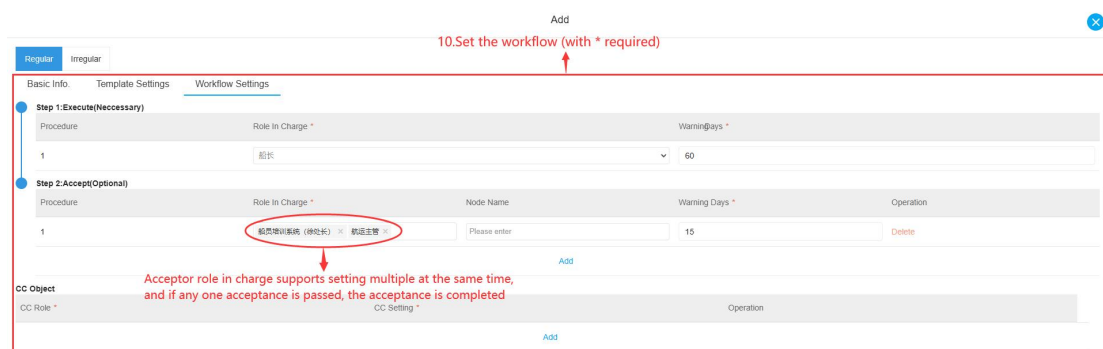
**Non-System Document Template**

Supports Word, Excel, and PPT Format Files

**Tips:**  
1. Please upload a docx format file after Word 2007 version.



After setting the workflow, click "Confirm" (Acceptor role in charge supports setting multiple at the same time, and if any one acceptance is passed, the acceptance is completed).

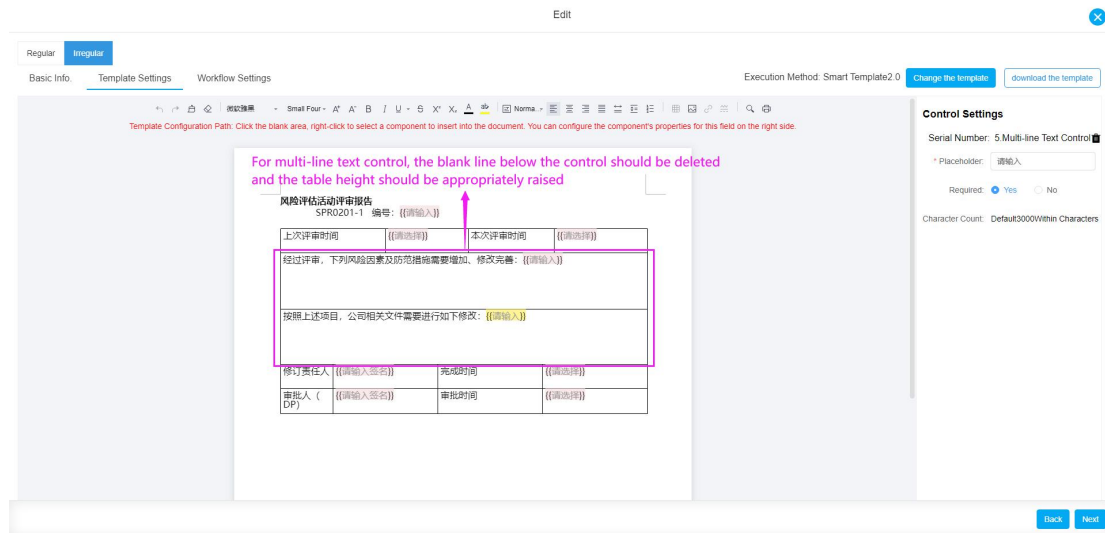


**Note:**

During the setting process of Smart Template 2.0, **For multi-line text control, the**

**blank line below the control should be deleted and the table height should be appropriately raised.** In this way, when filling in the content, if the content in the control is not enough to fill the table, it will be displayed at the set line-height; and when the content of the control is filled in more, the line will also be automatically raised.

This setting can ensure that the form can be displayed flexibly and efficiently during the filling process, regardless of whether the content is small or large. It can not only improve the aesthetics of the form, but also avoid the problem of non-standard content display caused by too many blank lines.



## (2) Smart Template 1.0

Before uploading the template, use "`{{field name}}`" to identify the required contents, such as "`{{number}}`". Select "Smart Template 1.0" in the execution method, click upload the set template (only supporting .docx format), the system will automatically parse the fields in the template and set the data type of each field as needed. For example, "Last Review Time" can be set to "Date Selection" type. After the setting, click "Next" to set the workflow.

### Note:

- (1) "`{{}}`" is output by the English input method;
- (2) If the placeholder in the document is not correctly identified (i. e. "`{{XXXX}}`"), you can try to manually input again, but the placeholder is still not identified, please contact the technical personnel for processing.

## 风险评估活动评审报告

SPR0201-1 编号: {{编号}}

上次评审时间	{{上次评审时间}}	本次评审时间	{{本次评审时间}}
经过评审，下列风险因素及防范措施需要增加、修改完善：{{经过评审，下列风险因素及防范措施需要增加、修改完善}}		经过评审，下列风险因素及防范措施需要增加、修改完善：{{经过评审，下列风险因素及防范措施需要增加、修改完善}}	
<b>6. Before uploading the template, use "{{field name}}" to identify the required contents</b>			
按照上述项目，公司相关文件需要进行如下修改：{{按照上述项目，公司相关文件需要进行如下修改}}			
修订责任人	{{修订责任人}}	完成时间	{{完成时间}}
审批人 (DP)	{{审批人 (DP)}}	审批时间	{{审批时间}}

Add


×

RegularIrregular

Basic Info.Template SettingsWorkflow Settings

7. Select "Smart Template 1.0" in the execution method, click upload the template (only supporting .docx format)

Execution Method: Smart Template1.0

  
Please upload the template first. It supports DOCX format.  
Click or Drag The File Here to Upload

Execution Method: Online Editing

**SMS Files**

File Name	Operation
	N/A

**Non-System Document Template**

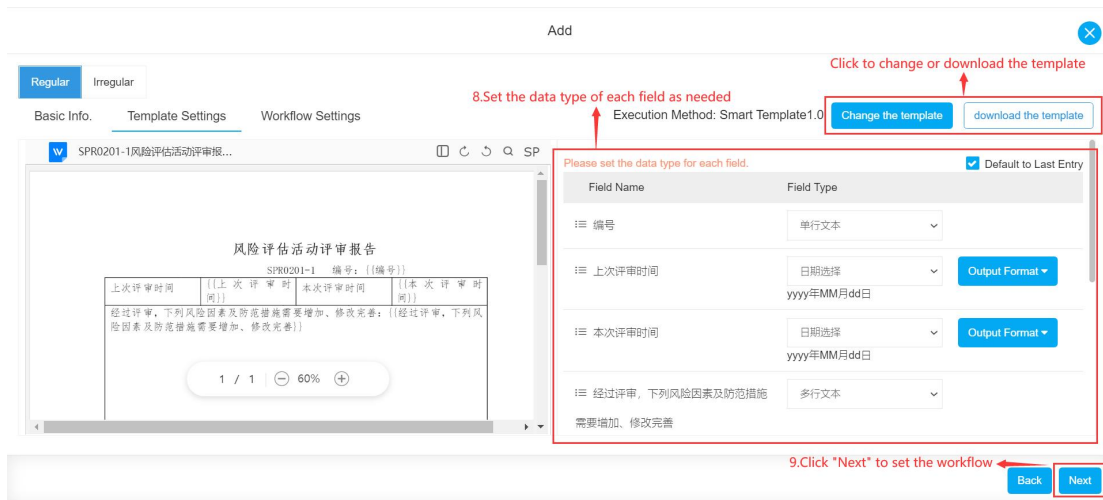
Upload

Supports Word, Excel, and PPT Format Files

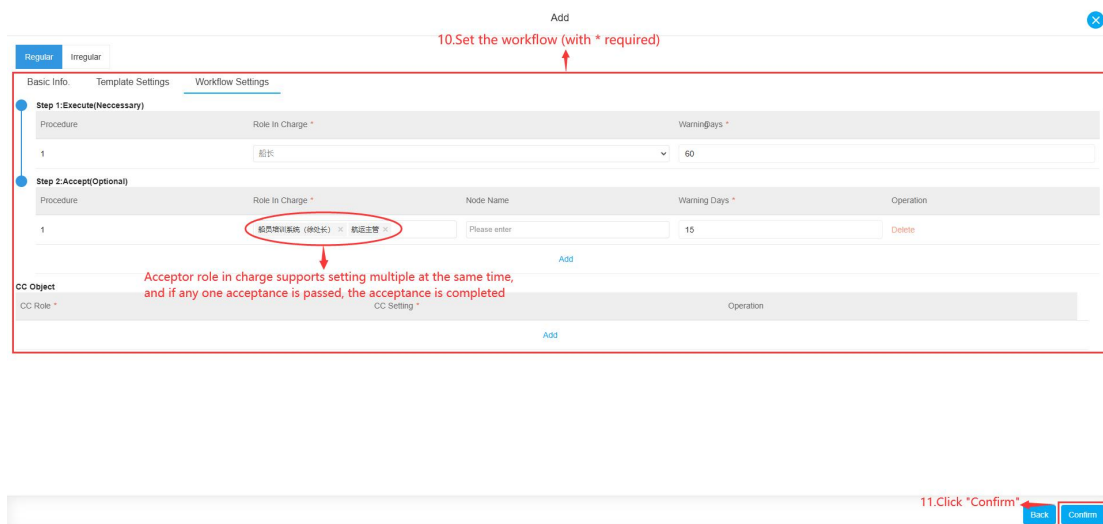
**Tips:**

- Before uploading the template, please use "{(Field Name)}" to identify the content that needs to be filled in. [Click to View Legend](#).
- If the placeholders in the document (i.e., "{(XXXX)}") are not correctly recognized, please

BackNext



After setting the process, click "OK" (Acceptor role in charge supports setting multiple at the same time, and if any one acceptance is passed, the acceptance is completed).



## 2. Online Editing

After the user logs in the the OLISS Web side, click "SMS Task Setting", then click "Add" to enter the Add interface, select "regular" or "irregular" as needed, fill in the basic information (with \* required), select the associated SMS files and applicable vessels, and click "Next" to set the template.

**Note:** When selecting the associated system file, if the selected system file has an attachment, the attachment can be used as a template for online editing.

互海科技 Workbench 20984 Vessel Monitor Find Switching System EN 朱慧

SMS Management SMS Task SMS Task Setting

2. Click "Add"

1. Click "SMS Task Setting"

No.	File No.	Table No.	Table Name	Record Time	Vessel Name	Receiving Dept	Effective Time	Upload Period	P.I.C of U	Operation
0	000	cx003-01	新聘和转岗岸基人员职责熟悉记录表		LINK OCEAN 1		2020-11-09	1Month	船长	Edit Delete Off
0	001001	001001-1	船舶SMS报告 (智能模板2.0)		LINK OCEAN ...		2024-01-01	1Month	船长	Edit Delete Off
0	0101	0101	船舶SMS检查报告 (智能模板)		LINK OCEAN ...	体系办	2024-11-14	Irregular	船长	Edit Delete Off
0	0101	HH0101990	互海测试管理表格		LINK OCEAN 1		2024-08-08	Irregular	船长	Edit Delete Off
0	06101	01229	船舶SMS报告		LINK OCEAN ...		2024-01-01	Irregular	船长	Edit Delete Off
0	091101	091101	excel091101		LINK OCEAN 1		2024-09-11	1Month	采购专员	Edit Delete Off

650 Total 10Total/Page 1 2 3 ... 65 Go To 1 Page

3. Select "regular" or "irregular" as needed

Add

4. Fill in the basic information (with \* required)

Regular Irregular

Basic Info. Template Settings Workflow Settings

File No. \* Table No. \* Table Name \* No. \* (The Smaller, The Closer)

Effective Time Upload Period(Month) \* Record Time Receiving Dept

Remarks

Associated SMS Files

Please select SMS files.

Vessel Name \*  Select All Add

Next

Associated SMS Files If the selected SMS file comes with attachments, this attachment can be used as a template for online editing

6. Select the relevant SMS files as needed

Please select File Grouping Search Clear

File Classificatio...	File No.	安全	×	Responsible Dept.	Appx No.	Yes	Effective Date	Uploader
<input checked="" type="checkbox"/> Procedure Manua		安全管理程序文件目录(Catalog Of Safety Management Procedures)				Yes		CruzDing
<input type="checkbox"/> Management Manual	SMM-2021	安全管理手册				Yes	2021-08-18	沈雪飞
<input type="checkbox"/> Management Form	LW9.27.4	甲板部安全设施检查表				Yes		杨芬芬
<input type="checkbox"/> Management Form	LW16.1.3	安全生产标准化管理综合评价与改进报告				Yes		沈雪飞

4 Total 10Total/Page

7. Click "OK"

Confirm

Add ✕

ZUZ4-TZ-TZ 1 Please enter Please enter

**Remarks**  
Please enter

**Associated SMS Files**  
Please select SMS files.

File No.	File Name	Appendix	Operation
	安全管理程序文件目录(Catalog Of Safety Management Procedures)		<span style="color: red;">✕</span>

Vessel Name \*  Select All Add

Vessel	Initial Upload Date	Deadline	Operation
LINK OCEAN 1	2024-12-12	Please select	<span style="color: red;">Delete</span>

8. After selecting the applicable vessels, click "Next" Next

You can choose the attachment of the associated system file as the template for online editing, or you can upload the file as the template (support Word, Excel, PPT format files), and click "Next" to set up the workflow.

Add ✕

Regular Irregular

Basic Info. Template Settings Workflow Settings

Tips: If template setup is skipped, execution can only be completed by uploading attachments.

Execution Method: Smart Template2.0

Please upload the template first. It supports DOCX format.  
Click or Drag The File Here to Upload

Tips:  
1. Please upload a docx format file after Word 2007 version.

Execution Method: Online Editing

**SMS Files**

File Name	Operation
SMS培训计划.docx	<input type="radio"/> Set As Template

**Non-System Document Template**

Upload → 9. You can choose the attachment of the associated system file as the template for online editing, or you can upload the file as the template (support Word, Excel, PPT format files)

Supports Word, Excel, and PPT files

Back Next

Add ✕

Regular Irregular

Basic Info. Template Settings Workflow Settings

Execution Method: Online Editing

Click to change or download the template

Change the template
download the template

SPR0201-2风险评估活动评审报...

### 风险评估活动评审报告

SPR0201-1 编号:

上次评审时间	本次评审时间	
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经过评审, 下列风险因素及防范措施需要增加、修改完善:

10. Click "Next" Next

After setting the workflow, finally click "Confirm"(Acceptor role in charge supports setting multiple at the same time, and if any one acceptance is passed, the acceptance is completed).

Add

11.Set the workflow (with \* required)

Regular Irregular

Basic Info. Template Settings Workflow Settings

**Step 1:Execute(Necessary)**

Procedure: Role in Charge \* Warning Days \*

1 船长 60

**Step 2:Accept(Optional)**

Procedure: Role in Charge \* Node Name Warning Days \* Operation

1 船员培训系统 (船长) 航运主管 Please enter 15 Delete

CC Object

CC Role \* CC Setting \* Operation

Add

Accepter role in charge supports setting multiple at the same time, and if any one acceptance is passed, the acceptance is completed

12.Click "Confirm"

Back Confirm

### 3.Uploading Attachments

After the user logs in the the OLISS Web side, click "SMS Task Setting", then click "Add" to enter the Add interface, select "regular" or "irregular" as needed, fill in the basic information (with \* required), and click "Next" to set the template.

互海科技 Workbench 20984 Vessel Monitor Find Switching System EN 朱慧

SMS Management SMS Task SMS Task Setting

Add Import Export Set Expiration Date Copy Vessel Valid Associated SMS Files Execution Method Keywords Searching Search Reset

No.	File No.	Table No.	Table Name	Record Time	Vessel Name	Receiving Dept	Effective Time	Upload Perio...	P.I.C of U	Operation
0	000	cx003-01	新聘和转岗岸基人员职责熟悉记录表		LINK OCEAN 1		2020-11-09	1Month	船长	Edit Delete Off
0	001001	001001-1	船舶SMS报告 (智能模板2.0)		LINK OCEAN ...		2024-01-01	1Month	船长	Edit Delete Off
0	0101	0101	船舶SMS检查报告 (智能模板)		LINK OCEAN ...	体系办	2024-11-14	Irregular	船长	Edit Delete Off
0	0101	HH0101990	互海测试管理表格		LINK OCEAN 1		2024-08-08	Irregular	船长	Edit Delete Off
0	06101	01229	船舶SMS报告		LINK OCEAN ...		2024-01-01	Irregular	船长	Edit Delete Off
0	091101	091101	excel091101		LINK OCEAN 1		2024-09-11	1Month	采购专员	Edit Delete Off

650 Total 10Total/Page < 1 2 3 ... 65 > Go To 1 Page

Add

Regular Irregular → 3.select "regular" or "irregular" as needed

4.Fill in the basic information (with \* required)

Basic Info. Template Settings Workflow Settings

File No. \* Table No. \* Table Name \* No. \* (The Smaller, The Closer)

Please enter Please enter Please enter 0

Effective Time Upload Period(Month) \* Record Time Receiving Dept

2024-12-12 Please enter Please enter Please enter

Remarks

Please enter

Associated SMS Files

Please select SMS files.

Vessel Name \*  Select All Add

5.Click "Next" to set the template ← Next

Due to the method of uploading attachments, directly skip the template Settings and click "Next" to set the workflow.

Add ✕

Regular Irregular

Basic Info. Template Settings Workflow Settings

Tips: If template setup is skipped, execution can only be completed by uploading attachments.

Execution Method: Smart Template2.0

⬆

Please upload the template first. It supports DOCX format.

Click or Drag The File Here to Upload

Tips:  
1. Please upload a docx format file after Word 2007 version.

Execution Method: Online Editing

**SMS Files**

File Name	Operation
N/A	

**Non-System Document Template**

Upload

Supports Word, Excel, and PPT Format Files

6. Directly skip the Template Settings and click "Next" to set the workflow

Back Next

After setting the workflow, finally click "Confirm" (Accepter role in charge supports setting multiple at the same time, and if any one acceptance is passed, the acceptance is completed).

Add ✕

7. Set the workflow (with \* required)

Regular Irregular

Basic Info. Template Settings Workflow Settings

**Step 1: Execute(Necessary)**

Procedure	Role In Charge *	Warning Days *
1	船长	60

**Step 2: Accept(Optional)**

Procedure	Role In Charge *	Node Name	Warning Days *	Operation
1	船类培训教员 (船类长)	Please enter	15	Delete

Add

**CC Object**

CC Role *	CC Setting *	Operation

Add

Accepter role in charge supports setting multiple at the same time, and if any one acceptance is passed, the acceptance is completed

8. Click "Confirm"

Back Confirm