

Navigation basics

September 10, 2026

Navigation basics

Overview

Navigation basics is the task of choosing the PAMS work area that matches what you need to do.

A work area is a PAMS starting place for a kind of work: one area provides summary information,

while the personal work area provides work lists and linked work. For shared screen conventions, see

[Understanding the interface](#).

For summary details, see [Summary overview](#). For detailed My Desk work, see [My Desk workspace](#).

If you need to...	Go to...
Review summary information	Summary overview
Open personal work lists and linked work	Workspace guidance
Change the layout of your workspace	Personalizing your workspace
Work with tasks	My Desk tasks
Work with activities	My Desk activities
Read reports	Reports hub

Start with the prerequisites below, then choose the area that matches your work.

Before you start

Prerequisites

- Sign in before opening the summary area. The summary area displays only when the signed-in condition is true.

- Expect the available personal-work areas to depend on your role and subscription. Task, activity, and calendar areas are available only when their corresponding features are included.
- Your available areas and columns depend on your role, subscription, and company layout.
- Use the labels and headers visible on your screen to choose a view and read its contents.

Note: A principal-user setup follows a different My Desk branch. In that branch, the **Tasks**, **Activities**, and **Calendar** tabs are shown as disabled rather than as selectable tabs.

After checking these conditions, choose and open a work area.

Choose and open a work area

Choose the area that matches the question you are answering. Home and My Desk are separate work areas.

Prerequisites

- You are signed in.
- You know whether you need summary information or personal work lists.

Steps

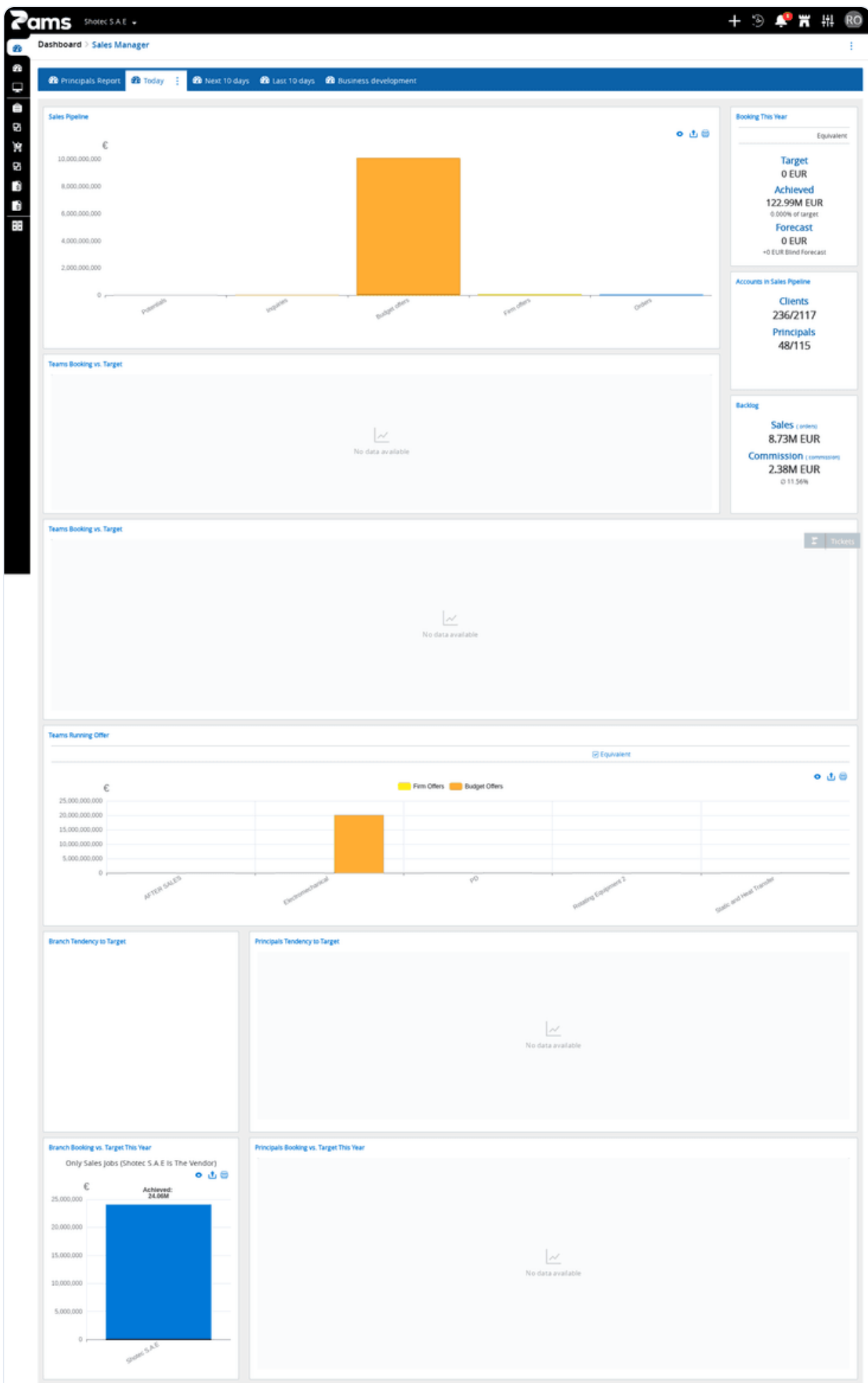
1. Choose one route from the table.

If you need to...	Open
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| Review summary information and page text | the summary area |
 | Open current or archived work lists and related views | the personal work area |

2. Open the route you chose.
3. Check the address bar for the route you opened.

Result: The selected area opens with its summary or work-list content. After opening a work area, identify its visible areas and controls.





Understand the visible work area

The summary area lists Principals Report ,

Today , Next 10 days , Last 10 days , Business development , Sales Pipeline , Potentials ,
Inquiries , Budget offers , Firm offers , Orders , Booking This Year , Equivalent , Target ,
Achieved , and Forecast .

The summary area also shows three named controls: **Sort by Booking**,
Sort by Target, and **Sort by Achievement**. None carries a required marker.

The summary area has no visible data columns and no buttons.

On My Desk, the main choices are **Current** , **Archived** , **Graphs** , **Tasks**, **Activities**, and **Calendar**. The views show the following headers and choices.

View	Headers or calendar days	Other visible choices
Tasks	Title , Owner , Start date , Due date , Status , Importance	All
Activities	Title , Visitors , Activity purpose , Company , Startdate , Status , Importance	All, Visits, Email, Meetings, Call
Calendar	Sun , Mon , Tue , Wed , Thu , Fri , Sat	Today, September 2026, Day, Week, Month, Task

The **Tasks** view shows six data columns. **Activities** shows its listed columns and controls.

Use these visible choices to select the view for your next task.

Select a view and navigate

The personal work area groups work by status and by the kind of work you need to review. **Current** is

the starting group; **Archived** groups the archived work. The other tabs select the work view in the centre of the screen.

Prerequisites

- You have opened the personal work area.
- The required feature is included if you need **Tasks**, **Activities**, or scheduled work.

Steps

1. Select the view that matches your next task.

If you need to...	Select
Review current work	Current
Review archived work	Archived
Review summary graphs	Graphs
Review tasks	Tasks
Review activities	Activities
Review scheduled work	Calendar

Result: The selected view appears in the centre of the personal work area, with its headers or calendar controls.

If an area or tab differs, compare the role, subscription, and layout conditions before continuing.

Current Archived

Current Archived

Sales jobs

Potentials	300.00K € 359
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Inquiries 14.74M € 472 ▾

Budget Offe 10 098 € 185 ▼

Firm Offers 53.53M € 911 ▼

Orders 34,95M 6 103

Sales Invoices

Due 3.81K € 2 ▾

Overdue 213.84K € 23 ▾

Commission Invoices

Due 28.59K € 2 ▾

Overdue	43.56K € 8
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Principals Invoices

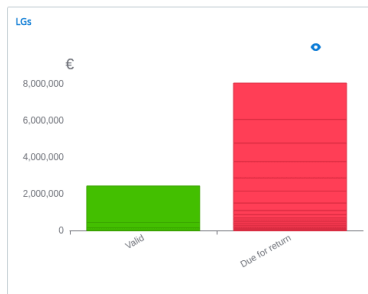
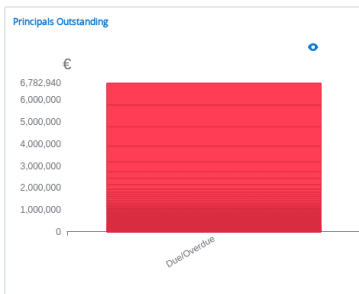
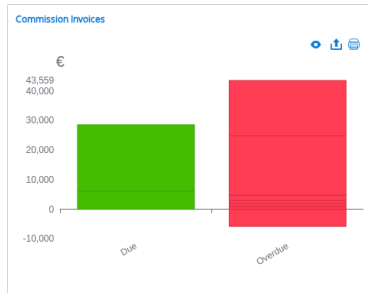
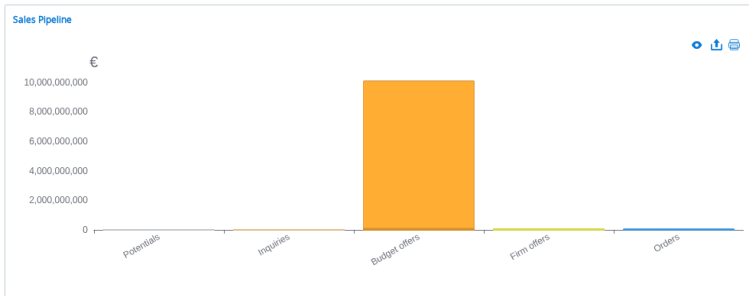
Due/overdue 7.09M € 116 ▾

LGS

Active 2.43M 9

Due for Ret... 8.02M .م.ج. 32 ▾

 Graphs
 Tasks
 Activities
 Calendar



Tickets

Current Archived

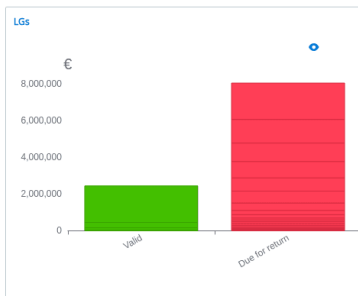
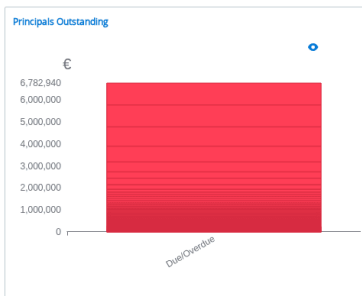
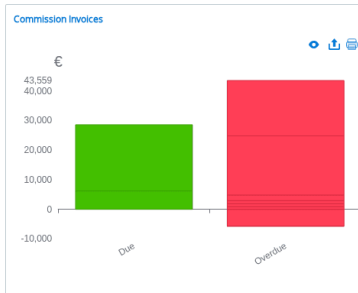
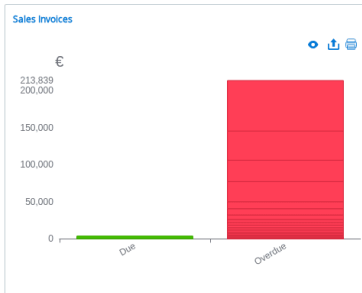
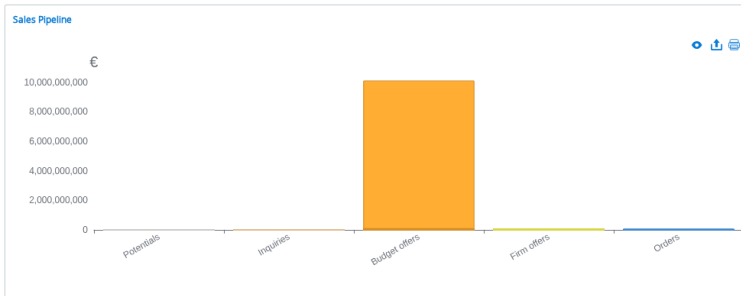
Sales Jobs

Archived

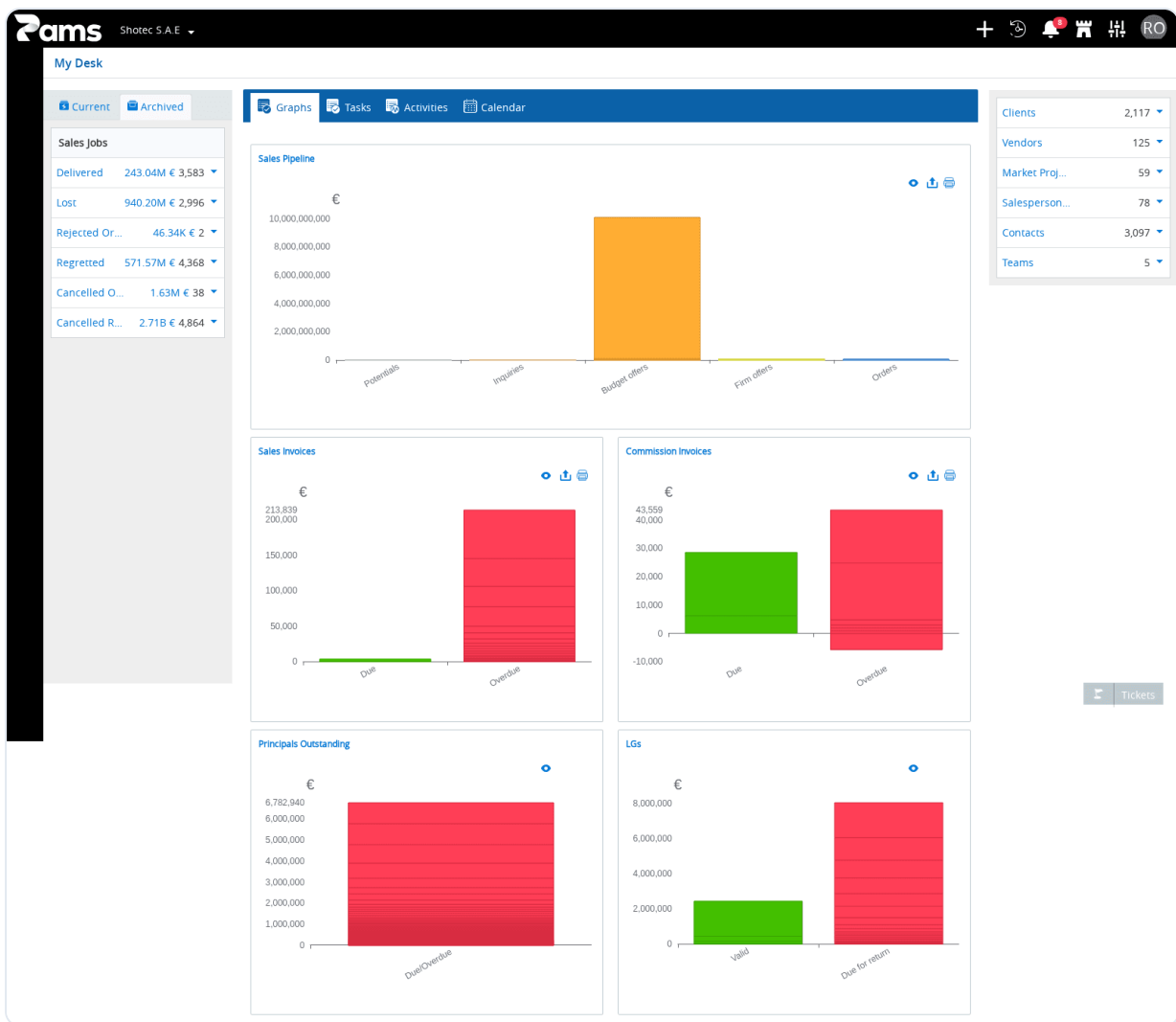
Sales jobs

Delivered	243.04M €	3,583
Lost	940.20M €	2,996
Rejected Or...	46.34K €	2
Regretted	571.57M €	4,368
Cancelled O...	1.63M €	38
Cancelled R...	2.71B €	4,864

 Graphs
 Tasks
 Activities
 Calendar



Tickets



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My Desk

Current Archived

Sales Jobs

- Delivered 243.04M € 3,583
- Lost 940.20M € 2,996
- Rejected Or... 46.34K € 2
- Regretted 571.57M € 4,368
- Cancelled O... 1.63M € 38
- Cancelled R... 2.71B € 4,864

Graphs Tasks Activities Calendar

All My Tasks View completed tasks

	Title	Owner	Start date	Due date	Status	Importance	
☐	Testing 2	Ramy Othman	14 Oct 2025	15 Oct 2025	Overdue	Medium	...
☐	Testing 3	Ramy Othman	14 Oct 2025	15 Oct 2025	Overdue	Low	...
☐	Tester 22	Ramy Othman	07 Oct 2025	08 Oct 2025	Overdue	High	...
☐	Testing 2	Ramy Othman	01 Oct 2025	02 Oct 2025	Overdue	Medium	...
☐	Testing Tasks	Ramy Othman	01 Oct 2025	02 Oct 2025	Overdue	High	...
☐	Testing Tasks 2	Ramy Othman	01 Oct 2025	02 Oct 2025	Overdue	High	...
☐	Testing3	Ramy Othman	30 Sep 2025	01 Oct 2025	Overdue	High	...
☐	Testing 2026	Ramy Othman	30 Sep 2025	01 Oct 2025	Overdue	High	...
☐	Testing 2027	Ramy Othman	30 Sep 2025	01 Oct 2025	Overdue	High	...

Count: 9

< 1 >

Clients 2,117
Vendors 125
Market Proj... 59
Salesperson... 78
Contacts 3,097
Teams 5

Tickets

Handle role, subscription, and layout differences

Your role, subscription, and company layout determine which work areas and tabs appear. The summary area appears under its configuration and subscription conditions. The personal work area uses a separate principal-user branch and checks the subscription for its task, activity, and calendar tabs.

What changes	What to expect
Summary-area condition	The summary area shows its configured content when the condition and tabs are present.
Subscription	Tasks, Activities, and Calendar appear when their corresponding features are included.
Principal-user branch	This branch shows these tabs as disabled. The personal-work branch shows them as selectable when available.
Company layout	The available columns and left-column contents follow the saved company layout.
Task filter options	Following is not available in the current task template.

Result: The tabs and columns on your screen reflect the role, subscription, and saved layout

that apply to your work area.

If one of these left-column controls is unavailable, review the role, subscription, and company-layout conditions above before continuing.

When navigation does not match

Use the message text and the visible work area to decide what to do next. **Sort by Booking** is

visible on **Home**, but selecting it does not activate the control. Continue with the other visible controls.

The following messages can appear while you work in **Home** or **My Desk**. Match the message on screen before you choose what to do next.

Message	What to do
Your request was completed successfully	Continue from the updated screen.
An error occurred while processing your request	Review the action and try it again.
Forbidden characters detected. Please remove them and try again.	Remove the disallowed characters and retry.
Action not allowed	Stop and use the available action for your role or current screen.

The principal-report message belongs to the report area rather than navigation orientation.

Out of scope

Message	Owning area
Please choose one or more principals	Principal report

After reading the message or resolving **Sort by Booking**, continue to the destination for the work.

The **Current**, **Archived**, **Graphs**, and **Tasks** views showed no visible controls at the time of checking. **Activities** and **Calendar** showed their controls. No dialog or message appeared.

Some work-area content depends on company setup. Use the labels and headers visible on your screen rather than assuming that every possible widget, data column, or tab appears in every work area.

Continue from the work area

Navigation ends when you have opened the work area and selected the view that matches your next job. Continue to the destination that covers that work:

- Use [Summary guidance](#) for summary areas and widgets.
- Use [Workspace guidance](#) for linked records and workspace navigation.
- Use [Task guidance](#) for task-list work.
- Use [Activity guidance](#) for activity-list work.

- Use [Workspace-layout guidance](#) for layout changes.
- Use [Reporting guidance](#) or [Reports guidance](#) for reporting.
- Use [Help guidance](#) when a route or surface remains unavailable.

Result: You are in the work area and view that match the work you need to continue.