

Release 2017.3

We are happy to announce the release of IDEA SBA 2017.3.

This document will give you an overview regarding the changes and new functionality provided within this release. As always, you can find the current SBA version online at our demo portal:

[IDEA SBA Demo](#)

As a password, please use "12345678".

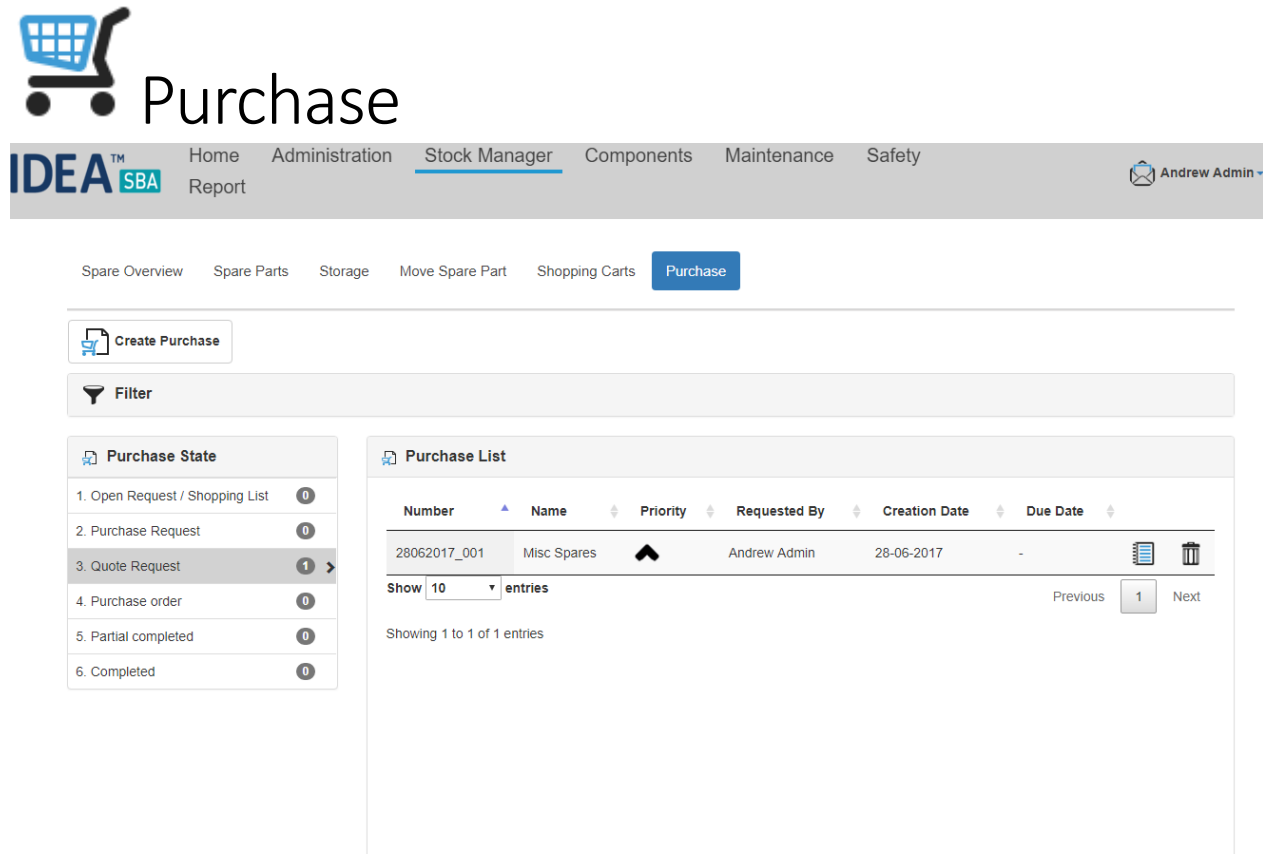
Important notice

All SBA pages will get this update at the 05.07.2017 - please note that during the time from 09:00 am to 10:00 am CET your SBA portal will be unavailable.

SBA Data center edition

Introduction

SBA 2017.3 is a major update to SBA including a complete new module for purchasing, new sets of permission and different changes to the user interface that should make the usage of SBA faster and easier.

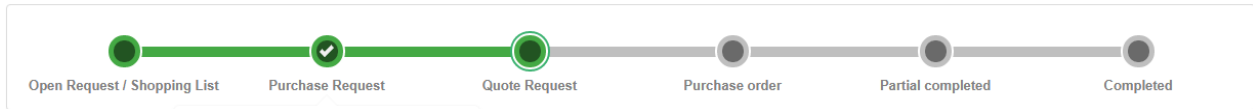


The screenshot shows the SBA Purchase module interface. At the top, there is a navigation bar with the IDEA SBA logo and links to Home, Administration, Stock Manager (highlighted), Components, Maintenance, and Safety. A user profile for Andrew Admin is visible on the right. Below the navigation bar, there is a sub-navigation bar with links to Spare Overview, Spare Parts, Storage, Move Spare Part, Shopping Carts, and a prominent blue Purchase button. The main content area is divided into two sections. On the left, there is a 'Purchase State' sidebar with a list of states: 1. Open Request / Shopping List (0), 2. Purchase Request (0), 3. Quote Request (1), 4. Purchase order (0), 5. Partial completed (0), and 6. Completed (0). The 'Quote Request' state is selected. On the right, there is a 'Purchase List' section. It features a table with columns: Number, Name, Priority, Requested By, Creation Date, and Due Date. The table contains one entry: Number 28062017_001, Name Misc Spares, Priority (indicated by an upward arrow), Requested By Andrew Admin, Creation Date 28-06-2017, and Due Date -. Below the table, there is a 'Show 10 entries' dropdown and a 'Showing 1 to 1 of 1 entries' message. Navigation buttons for Previous, 1, and Next are also present.

General information

Our new purchase module allows you to manage orders for your spare parts inside of SBA. The design idea behind this module is to implement a process that fits your needs and can be changed anytime. As with all other SBA modules, we tried to make it as flexible as possible – for example, you can collect different lists of items and order directly from your default supplier or you can also separate the orders, ask for quotes and get the different costs tracked and approved – you see, the system allows a wide range of options to be used.

The module is included in each SBA Fleet solution for now, SBA Single Vessel doesn't offer the module yet – but we will provide more information soon.



Purchase process

Every purchase order in SBA follows the same process that defines the state of the purchase. These states can be changed to fit your needs, you can easily re-name and configure who is able to set a purchase order or use its functions in a given state.

The overview page provides two break downs about all purchase orders in your system – the left side shows the number by state and the right panel shows the details for the current selected state.

As for all the views in SBA, you can use the filter panel at the top to filter these views and even be able to configure your own custom default view or load filters made by other users.

Filter

Purchase State

1. Open Request / Shopping List 0

2. Purchase Request 0

3. Quote Request 1 >

4. Purchase order 0

5. Partial completed 0

6. Completed 0

Purchase List

| Number | Name | Priority | Requested By | Creation Date | Due Date | |
|--------------|-------------|----------|--------------|---------------|----------|--|
| 28062017_001 | Misc Spares | | Andrew Admin | 28-06-2017 | - | |

Show 10 entries

Previous 1 Next

Showing 1 to 1 of 1 entries

Figure 1 Purchase overview

Purchase permission

To customize your purchase process, please have a look at your system setting page. A new tab guides you into the process of setting permissions and names for the process states. The screenshot below shows the management page, the orange marked buttons can be used to customize the state name. To work on the permissions for this step, click on the buttons highlighted in green.

User Management Location Permissions **System Settings** Translations Budget Address book Dropdowns License

General Color and Warning Report **Purchase State**

| Expand Permission | Name | System Role | Order State |
|-------------------|------------------------------|---------------------|-------------|
| | Open Request / Shopping List | Open cart | 1 |
| | Purchase Request | Approval | 2 |
| | Quote Request | Waiting for quote | 3 |
| | Purchase order | Purchase order send | 4 |
| | Partial completed | Partial Completed | 5 |
| | Completed | Completed | 6 |

Showing 1 to 6 of 6 entries

Previous 1 Next

Additional to the permission above there are also some general purchase permissions included in the permission editor. This can be configured as for any other module in SBA.

Drill Crew and Guest Spare Part **Purchase** Location Maintenance Component Storage System

| | Master | Inventory Purchase | Administrator | Deck | Engineer Vessel | Read Only | Engineer Shore |
|------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Create budgets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Create Purchase | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete budgets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete Purchase | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete Shopping Cart | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit budgets | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit Purchase | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit Shopping Cart | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| See All Purchase | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| See All shopping carts | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Show 10 entries

Previous 1 2 Next

Purchase reports

SBA allows you to keep your own set of custom reports. As purchase related reports are hard to be designed to fit everybody's needs, we do offer custom reports for you. Feel free to contact us to describe your needs for the report.



Purchase by example

To create a new purchase request, you can either do it from the purchase overview page or from the shopping cart page.

Left Screenshot: Shopping Carts

Navigation: Home, Administration, Stock Manager, Components, Report

Sub-navigation: Spare Overview, Spare Parts, Storage, Move Spare Part, **Shopping Carts**

Buttons: Create Purchase

| Name | Creation Date |
|---------------------|---------------|
| Resort beach spares | 28.6.2017 |
| Winter Refit cart | 28.6.2017 |

Show 10 entries

Showing 1 to 2 of 2 entries

Right Screenshot: Purchase

Navigation: Home, Administration, Stock Manager, Components, Report

Sub-navigation: Spare Overview, Spare Parts, Storage, Move Spare Part, Shopping Carts, **Purchase**

Buttons: Create Purchase

Filter

Purchase State

- Open Request / Shopping List
- Purchase Request
- Quote Request**
- Purchase order
- Partial completed
- Completed

Purchase List

| Number | Name | Priority |
|--------------|-------------|----------|
| 28062017_001 | Misc Spares | |

Show 10 entries

Showing 1 to 1 of 1 entries

It is not required to have items to start a purchase request, nevertheless SBA offers two ways on how you can collect items to use them in the purchase – the shopping cart system and the spare part catalogue.

Shopping carts can be added by location (for example, when each vessel collects needed spares), by user or globally for everybody.

To move an item into a shopping cart you have different options, but all are using the cart symbol as shown in the examples below:

Navigation: Spare Overview, **Spare Parts**, Storage, Move Spare Part, Shopping Carts, Purchase

Buttons: New Spare Part, Barcodes

Filter

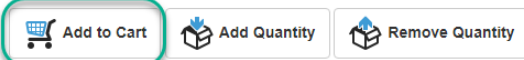
| Name | Group | Serial | Manufacturer | Supplier | |
|----------------|-------------------|----------|--------------|------------|--|
| Bearing 255678 | Bearing for Pumps | 255678 | Johnson | XYZ Spares | |
| Gasket 57685 | Gasket for Pumps | 57685 | Johnson | XYZ Spares | |
| O-Ring 12598 | O-Rings for Pumps | 12598 | Johnson | XYZ Spares | |
| Valve 14051601 | Valves for Pumps | 14051601 | Johnson | XYZ Spares | |

Show 10 entries

Showing 1 to 4 of 4 entries

Previous 1 Next

Figure 2 Spare part overview, shopping cart



General Information

General Information

Image



Figure 3 Spare part detail page

Additional to the pages related to a spare part, SBA also offers you the option to add requested spares to a shopping cart in case you do not have enough spares available in your storages as shown below:

| | | | |
|-----------------------------|-----------------------|--------------------------|--------------------|
| User Name | Repair Crew | Target Location | M/S Beach 1 |
| Total request amount | 8 | Request Timestamp | 28-06-2017 1:36 PM |
| Comment | request for later use | | |

The request includes the following details: 1 spare parts. Please choose source from the available data center storages

1. Valve 14051601

| Spare Part n.1 - Valve 14051601 Spare Description | | | |
|---|---------------------|--------------------|--|
| Target Location | Target Storage | Requested Quantity | |
| M/S Beach 1 | M/S Beach 1 Default | 8 | |

Following the data center storages where requested spare part is available. Please choose the source storages adding the quantity to move from.

| Storage | Current Qty | Quantity to move |
|----------------------------|-------------|------------------|
| No data available in table | | |

Showing 0 to 0 of 0 entries

Previous Next

Previous **Confirm**

Figure 4 Spare request, shopping cart

The shopping cart dialogue allows you to add an item, set the amount and shopping cart you want to use and also lets you create a new cart on the fly if needed.

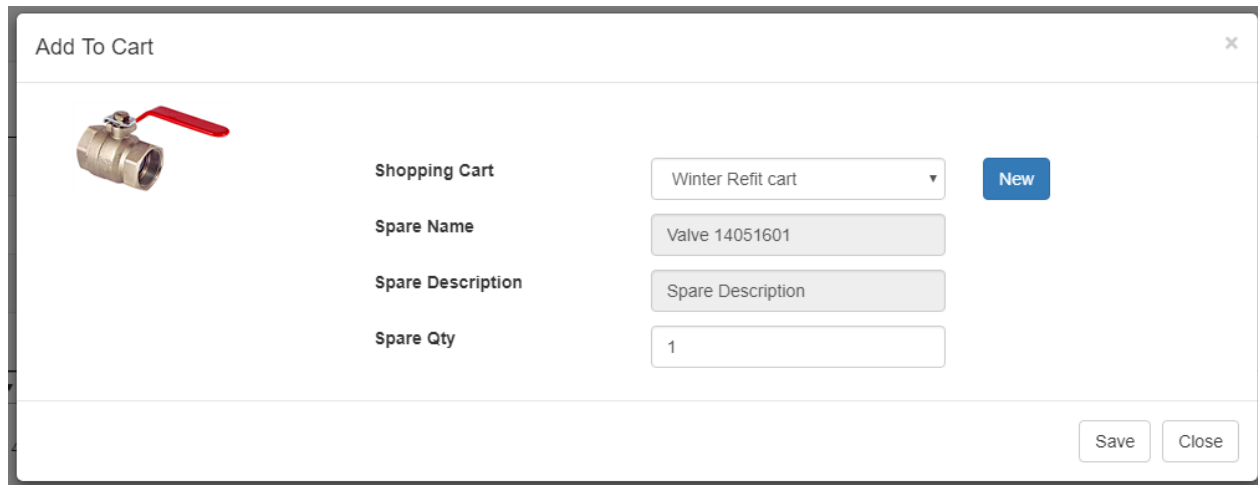
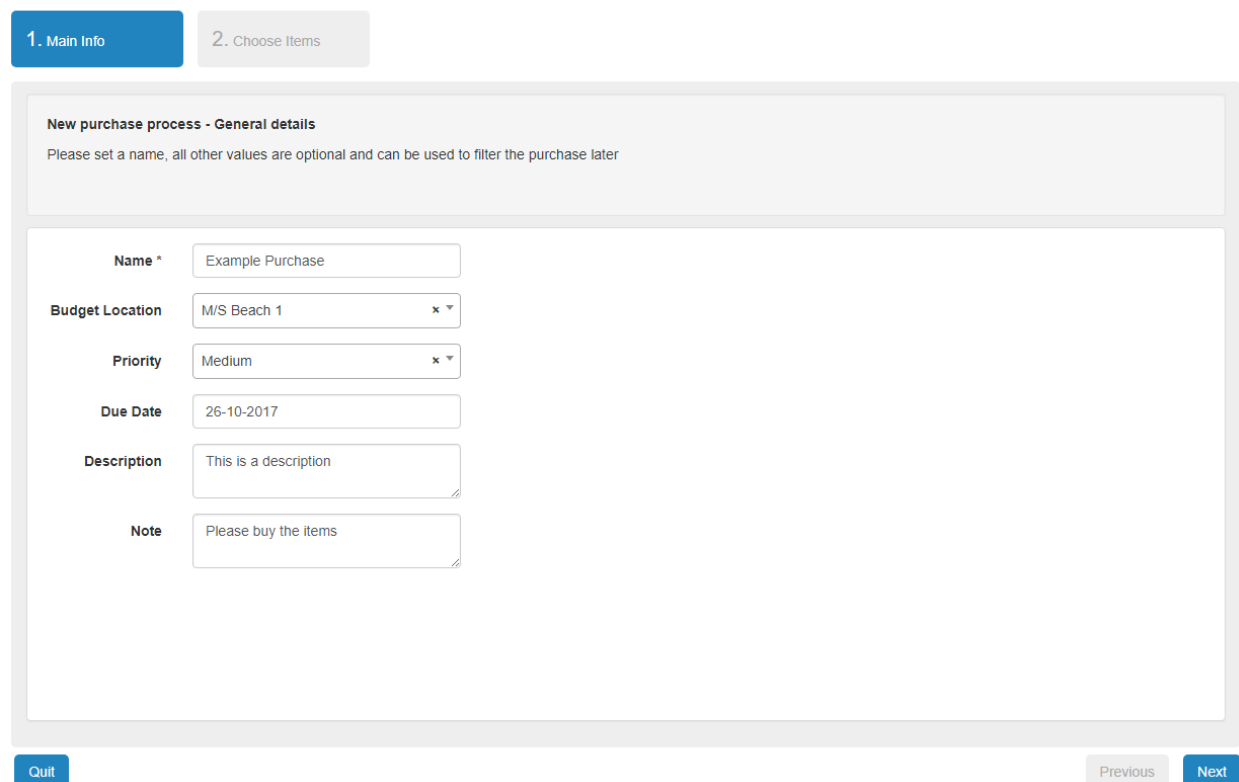


Figure 5 Add spare parts to shopping cart

As mentioned in the beginning, the shopping carts can be used to collect a list of spares to later start a purchase process and take them out of the carts. The purchase creation is based on two steps – a general one that defines details about the purchase like names or the budget location (more details later) and the second step which allows you to add items from your shopping carts. See the following two screenshots for an example:

Create Purchase



Create Purchase

1. Main Info

2. Choose Items

Add items from shopping cart

Select the items you would like to add into the purchase. This items can be changed later.

| Name | Created By | Check All |
|---|----------------|--|
|  Winter Refit cart | Storage Worker | <input checked="" type="checkbox"/> On |

| Shopping Item Name | Added By | Cart Quantity | Take All | Set Quantity |
|-----------------------------|----------------|---------------|--|--|
| O-Ring 12598 | Storage Worker | 8 | <input checked="" type="checkbox"/> On | <input type="text" value="8"/> |
| Showing 1 to 1 of 1 entries | | | | Previous <input type="text" value="1"/> Next |

Showing 1 to 1 of 1 entries Previous Next

Quit

Previous

Save

[Spare Overview](#)
[Spare Parts](#)
[Storage](#)
[Move Spare Part](#)
[Shopping Carts](#)
[Purchase](#)

[Purchase Overview](#) / [Purchase Detail](#)

Open Request / Shopping List
Purchase Request
Quote Request
Purchase order
Partial completed
Completed

Actions
Clone
Delete

Details
Items
Documents & Certificates

Name *

Spares

Purchase Number

29062017_001

Purchase State

Open Request / Shopping List

Creation Date

6/29/2017 8:26:31 AM

Requested By

Andrew Admin

Budget Location

M/S Sun down

Priority

Medium

Due Date

30-09-2017

Description

This is a description

Note

This is a note

Save

Back To List

Figure 6 Purchase detail

SBA offers a number system for purchases as shown above. This number can also be customized to fit your accounting system. Each purchase does have its own unique number to identify it in the system or, if required, to provide information over API's by any of your systems. The newly created purchase now still allows you to add items to it and until a purchase has been approved, the content can still be changed.

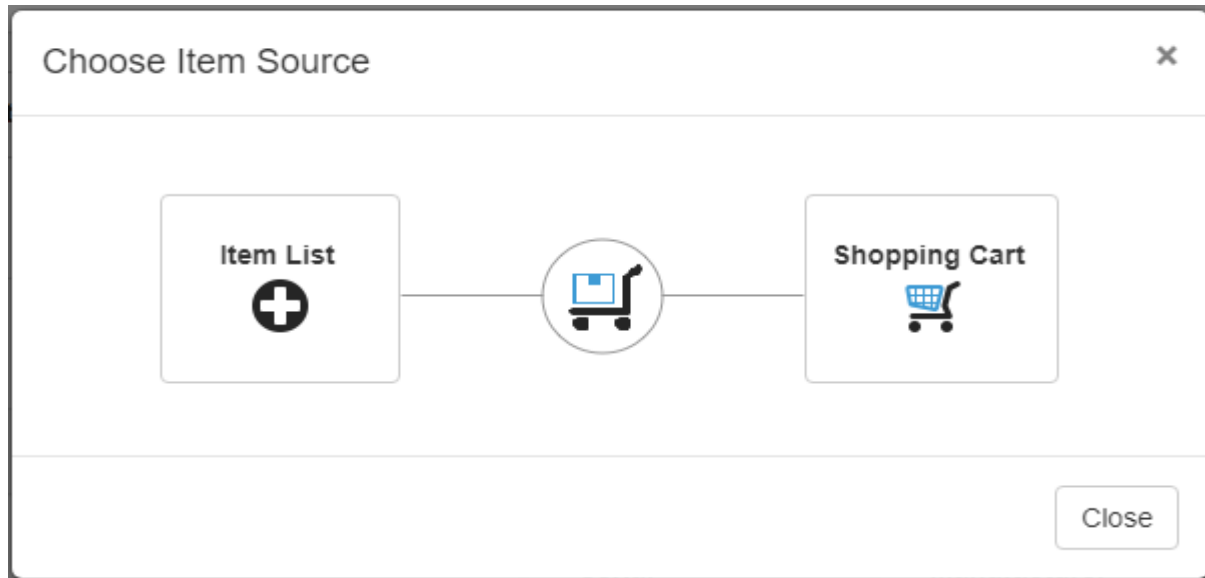
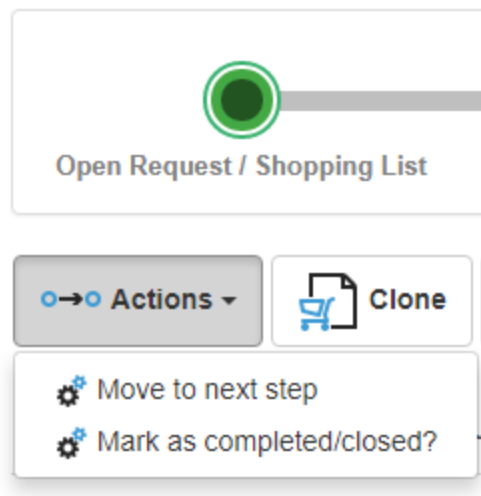


Figure 7 Add items to a purchase

Work with the purchase process

As soon as the order is ready you can proceed with using the action button at the purchase detail page. The action button always offers all of its functions – you can either proceed in the flow for the purchase or use functions offered by the step.



In case you need to separate purchase orders or cut/copy parts into a new order, you can use the clone tool.

Asking for quotes

SBA allows you to track multiple suppliers with price and part numbers for each item. During the purchase process, you can ask for a quote from any supplier connected to the item or even create a new one on the fly. The quote system offers an interface for your suppliers that allows them to easily fill out your quote requests online – no additional software, API integration or services are needed to use this function.

SBA will send out an e-mail with the details for the supplier but additionally you can of course update the data manually and download a quote report to send it to your suppliers.

Quote request

Note

Leave a note for the complete order...

| Deliverable | Item name | Manufacturer number | Your number | Amount | Single Price | Currency | Note |
|-------------------------------------|--------------|---------------------|-------------|--------|--------------|-----------------|---------------------|
| <input checked="" type="checkbox"/> | O-Ring 12598 | 12598 | 336033 | 2 | 59,59 | USD - US Dollar | Notes for this item |

Submit

Figure 8 Supplier web interface

The purchase detail page will keep you updated about the current state of your quotes.

Open Request / Shopping List Purchase Request **Quote Request** Purchase order Partial completed Completed

Actions Clone Delete

Details **Quotes** Documents & Certificates

| Supplier Name | State | Mail | Note | Online Request | Download Report | Quote State |
|---------------|-------|------------------------------|------|----------------|-----------------|-------------|
| XYZ Spares | SP | christian.muhrle@spectec.net | | Send Email | Download Report | Quote send |

Showing 1 to 1 of 1 entries Previous 1 Next

Back To List

Figure 9 Quote view

As shown in figure 10, a supplier updated this quote request – the item price is now shown including notes for the order and the item itself (highlighted in green).

| Supplier Name | State | Mail | Note | Online Request | Download Report | Quote State |
|---------------|-------|-----------------------------|------|-----------------------------|----------------------------------|----------------------------------|
| XYZ Spares | IS | christian.muhle@spectec.net | | <button>Send Email</button> | <button>Download Report</button> | <button>Supplier update</button> |

| Spare Name | Spare Note | Delivarable | Quantity | Price | Total Price | Currency |
|--------------|------------|-----------------------------|----------|-------|-------------|-----------------|
| O-Ring 12598 | | <input type="checkbox"/> On | 2 | 59.59 | 119.18 \$ | USD - US Dollar |

Showing 1 to 1 of 1 entries

Update Price Previous 1 Next

Figure 10 Updated quote by a supplier

Currency and exchange rates

SBA is able to manage one system currency that is used by you (of course you can configure this on the system settings page) and maintain a daily automatically updated list of exchange rates. The example below shows a purchase using a different currency than the one in the fleet.

| Spare Name | Serial | Manufacturer | Max Qty | Ordered Qty | Tot. Price | Selected Suppliers (Qty) |
|--------------|--------|--------------|---------|-------------|------------|--------------------------|
| O-Ring 12598 | 12598 | Johnson | 2 | 2 | 104.49 € | XYZ Spares (2) ✓ |

| State | Default | Supplier Name | Ordered Qty | Unit Price | Tot Price |
|-------|---------|---------------|--------------------------------------|--------------------|----------------------|
| IS | ✓ | XYZ Spares | 2 <input type="button" value="All"/> | 59.59 \$ (52.25 €) | 119.18 \$ (104.49 €) |

Showing 1 to 1 of 1 entries

Previous 1 Next

Budgets are always tracked in the system currency and all calculations are also presented in the system currency in case a different currency is used. The total amount is displayed in brackets behind it.

Spare prices and supplier data

SBA is able to track the following information for each supplier and spare part:

- Contact and address details of the supplier
- Price information with currency used by the supplier
- Spare part number / Supplier number for the item

The suppliers for a given spare part can be managed directly from the spare part detail page as shown below, the full information for the item are shown when you expand the view using the green button in the first column.

The screenshot shows the IDEA SBA Stock Manager interface. The top navigation bar includes links for Home, Administration, Stock Manager (active), Components, and Maintenance. A user profile for Andrew Admin is visible on the right. Below the navigation bar, there are tabs for Spare Overview, Spare Parts (active), Storage, Move Spare Part, Shopping Carts, and Purchase. The main content area is titled 'Spare Parts / Spare part details' and contains buttons for 'Add to Cart', 'Add Quantity', and 'Remove Quantity'. Below these are tabs for Spare Detail, Storage Overview, Supplier (active and highlighted with a green circle), Movement, Request, Stock History, and Documents & Certificates. Under the 'Supplier' tab, there is an 'Add Supplier' button and a table of suppliers. The table has columns for State, Supplier Name, Email, Telephone, City, Set Default, and Delete. One supplier is listed: 'XYZ Spares' with email 'christian.muhle@spectec.net'. A green circle highlights a green play button icon in the first column of the table. Below the table, it says 'Showing 1 to 1 of 1 entries' and there are 'Previous', '1', and 'Next' navigation links. A 'Back To List' button is at the bottom left.

Budgets in SBA

Budgets can be used as an optional step inside of the SBA Purchase module. We do offer two types of budgets:

- Level budgets
- Amount budgets

Each budget can be configured to have a timeframe, location and/or position its valid for. Amount budgets also have an optional interval that can be defined.

Create Budget

Name *

Type

Amount

Location

Select a value

User Position

Select a value

Amount (€) *

0

Time Plan

Periodic

Start Date

29-06-2017

Expiry Date

Time Interval

Day

Interval value

1

Who can approve the budget

| | | |
|---|--|---|
| <input type="checkbox"/> Admin | <input type="checkbox"/> Captain | <input type="checkbox"/> Deck |
| <input type="checkbox"/> Engineer Shore | <input type="checkbox"/> Engineer Vessel | <input type="checkbox"/> Fleet SuperIntendent |
| <input type="checkbox"/> Interior | <input type="checkbox"/> ReadOnly | <input type="checkbox"/> Shoreside Inventory |

Close

Save

Below are some examples you could setup with this system:

- Every engineer is allowed to place a purchase below 120\$ without approval, everything above requires an approval
- All users on the Warehouse A share a monthly budget of 2000\$ that can be spend without approval but every order above 500\$ still requires an approval

The budget system allows any combination for the type of the budgets and allows you to create a wide range of structures to fit your needs.

Creating orders

To generate purchase orders, you need at least one supplier to send the order to and a delivery address. Again SBA can use the “online order” feature to automatically send an order report to your supplier like the online quote system. You can still download the report later or send it via mail.

During the order process you can select which supplier should get the order. SBA offers two “quick order” functions:

- Default supplier by item
- Cheapest supplier

Auto Order ▼ Total Items: 1 Pending Items: 0 Total Costs: 104.49 €

- \$ Order cheapest price
- 👤 Order from default Suppliers
- ✖ Reset All

| Manufacturer | Max Qty | Ordered Qty | Tot. Price | Selected Suppliers (Qty) |
|--------------|---------|-------------|------------|--------------------------|
| Johnson | 2 | 2 | 104.49 € | XYZ Spares (2) ✓ |

| State | Default | Supplier Name | Ordered Qty | Unit Price | Tot Price |
|-------|---------|---------------|-------------|--------------------|----------------------|
| 🔄 | ✓ | XYZ Spares | 2 All | 59.59 \$ (52.25 €) | 119.18 \$ (104.49 €) |

Showing 1 to 1 of 1 entries Previous 1 Next

Figure 11 Creating an order

It is also possible to manually select which supplier should be used for a specific item. The order process is based on 3 steps using the SBA “Wizard” system. The first step as shown in figure 11 lets you choose what you want to order, the second step informs you about budgets effected by this order and possible required approvals for this. The last step provides a summary about the order and allows you to define how the order should be handled (online to the supplier/manually) and asks if you want to copy over the price information into your price catalog.

The order dialogue will also ask for a delivery address that can be selected from your location list – in case it is not yet set or you want to edit the information, you can do this directly in the dialogue.



Quick changes

- SBA now allows you to use the system in Portuguese for Brazil
- All “SBA Grid picker dialogues” can now be triggered by either clicking on the select button next to them or simply by clicking in the related field

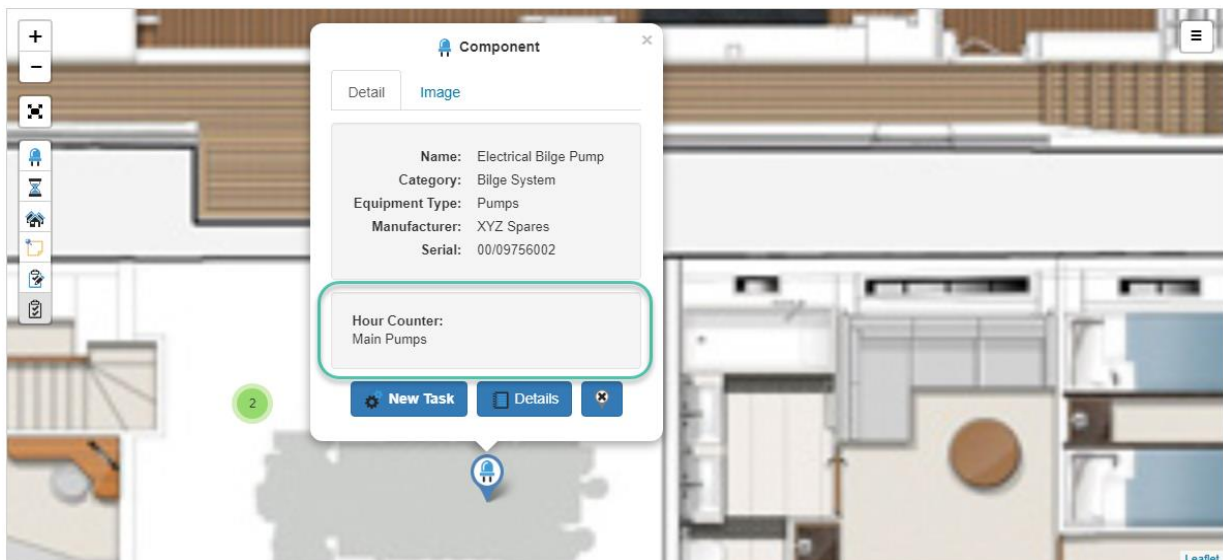
Please insert basic component data

Insert the basic information regarding the new component. The Component Name and Current Location are mandatory.

| | | | | |
|--------------------|--|------------------|---|------------------------------------|
| Component Name * | <input type="text"/> | Supplier | <input type="text" value="Johnson"/> x v | <input type="button" value="New"/> |
| Current location * | <input type="text"/> <input type="button" value="Select"/> | Manufacturer | <input type="text" value="Johnson"/> x v | <input type="button" value="New"/> |
| Serial | <input type="text"/> | Category * | <input type="text" value="Bilge System"/> | <input type="button" value="New"/> |
| Description | <input type="text"/> | Equipment Type * | <input type="text" value="General"/> | <input type="button" value="New"/> |
| Critical | <input type="checkbox"/> Off | | | |

Trigger the dialog to select a location

- Offer a ‘x’ for the smart dropdowns in SBA to quickly clear the content
- Drill categories can now be edited using the dropdown editor
- You can clone components to the same location as they are currently in
- Passport fields do allow any characters now
- The maintenance screen now shows the related location, not only in the filter anymore
- New locations will automatically create a default storage during the setup process
- The layout drawing shows all connected hour counters for components







Document system

All document uploads now allow you to set a description and expiry date for the document you want to attach. You can also change the expiry date for already uploaded documents by simply clicking on the icon next to it.

General
Layout
Devices
Documents & Certificates

Filter

| Filename | Description | Expire date | Upload date | |
|------------|---|--|-------------|---|
| report.pdf |  | 29-11-2018  | 29-06-2017 |   |

Show 10 entries
Previous 1 Next

Showing 1 to 1 of 1 entries

Attach new documents

Select a file





Datei auswählen
Keine ausgewählt

Upload

Expire date

Document Description

The document tab will also show expired documents in a red color to indicate an expired document.

| Filename | Description | Expire date | Upload date | |
|------------|---|--|-------------|---|
| report.pdf |  | 01-05-2017  | 29-06-2017 |   |

Show 10 entries
Previous 1 Next

To get a description text for a document just click the icon in the related row and SBA will show you the text in a new window.



Storages

With the version 2017.3 SBA offers a new deletion wizard for storages. In case your user has the permission to use it, the storage view will show a new icon.

IDEA™ SBA

[Home](#)
[Administration](#)
[Stock Manager](#)
[Components](#)
[Maintenance](#)

[Safety](#)
[Report](#)

Andrew Adm

[Spare Overview](#)
[Spare Parts](#)
[Storage](#)
[Move Spare Part](#)
[Shopping Carts](#)
[Purchase](#)

New Storage

Filter

| Name | Position | Location | Default Storage | | |
|--------|------------------|--------------------|-----------------|--|--|
| Box A1 | Next to the door | Resort Palm tree 1 | | | |
| Box A1 | Next to the door | Resort Sea Side 2 | | | |
| Box A1 | Next to the door | Resort Beach 2 | | | |
| Box A1 | Next to the door | Resort Sea Side 1 | | | |
| Box A1 | Next to the door | Resort Palm tree 2 | | | |
| Box A1 | Next to the door | Resort Blue 1 | | | |
| Box A1 | Next to the door | Resort Beach 1 | | | |
| Box A1 | Next to the door | Resort Blue 2 | | | |
| Box B2 | | Resort Palm tree 1 | | | |
| Box B2 | | Resort Blue 1 | | | |

Show 10 entries

Previous
1
2
3
4
Next

Please note that you can delete the default storage of a location

After a click on the icon you can choose what should happen with the items that are currently connected to this storage.

Please choose

×

Please decide where you want to move the items, if any, after the storage is removed.
Should we move all items to the default storage?

Yes

No, clear quantity too

No, Custom

Cancel

If you want to let SBA do the work, all items will be moved to the default storage of the location. Additionally you can also decide to remove any quantities inside the storage or do it completely on your own.