

# Release 2017.5

We are happy to announce the release of IDEA SBA 2017.5

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".

## SBA 2017.5

As the last major release for 2017, SBA 17.5 adds in the biggest number of new features in this year. Our goal was to add a new functionality that allows a fleet to track and manage their operations even more precise with regards to structure and cost tracking.

Beside the option to use the full purchase module to process work orders, SBA 2017.5 allows you to track maintenance time and costs with your own hourly rates. As spare parts can be cost intense we provide a new tool to the fleet managers to limit and structure the access to spares for a vessel only to the subset of needed spares.

Also, SBA mobile got a huge update including the full support for NFC tags. These tags can be used to pair to a wide range of elements and functions. Using the SBA NFC feature allows to speed up the daily work and reduce the need to search inside your data - one scan and your tasks are on the screen.

The next pages will contain a more detailed description of the changes, there is many more that was added.



## Work orders

Work orders can be used to track costs for operations completed by 3<sup>rd</sup> party companies. In SBA the major idea is to book the costs to a maintenance task either periodic or one time.

To get the most out of the system it is recommended to create the orders in a more general way, of course it is still possible to create a work order with a context to a task or an equipment.

To generate a new work order SBA offers the following options:

Figure 1 Work order creation - overview page

As shown above you can use the work order overview page to generate a new work order. All work orders contain the following data:

- Name: free text will be displayed on all pages using this work order
- Description: free text will only be displayed on detail pages
- Priority dropdown: from low to high can be used to structure and filter data
- Category: free dropdown used to structure and arrange your data

As soon as a work order is created, it is of course possible to manage suppliers with related price information. The work order created is always done with a single step wizard as shown on the next page.

## Create Work Order

1. General

Create New Work Order

Please set all information about a new Work Order.

Name \*

Description

Work Order Priority \*

Work Order Category \*

Select a value

New

Figure 2 Wizard - Work order creation

Beside the general creation shown above SBA also offers you to generate prefilled work orders for an equipment or maintenance task. SBA will add the name of the task/equipment and you can type in the missing part.

The idea behind this is to indicate a relation between this work order and another element. Please note that it is still possible to use this work order also for a task not related to the original equipment or maintenance task.



## Purchase V2

With SBA 2017.5 you can now choose if you want to start a purchase process for spares or work orders. The general workflow is the same: collect, approve, get quotes, order and receive.

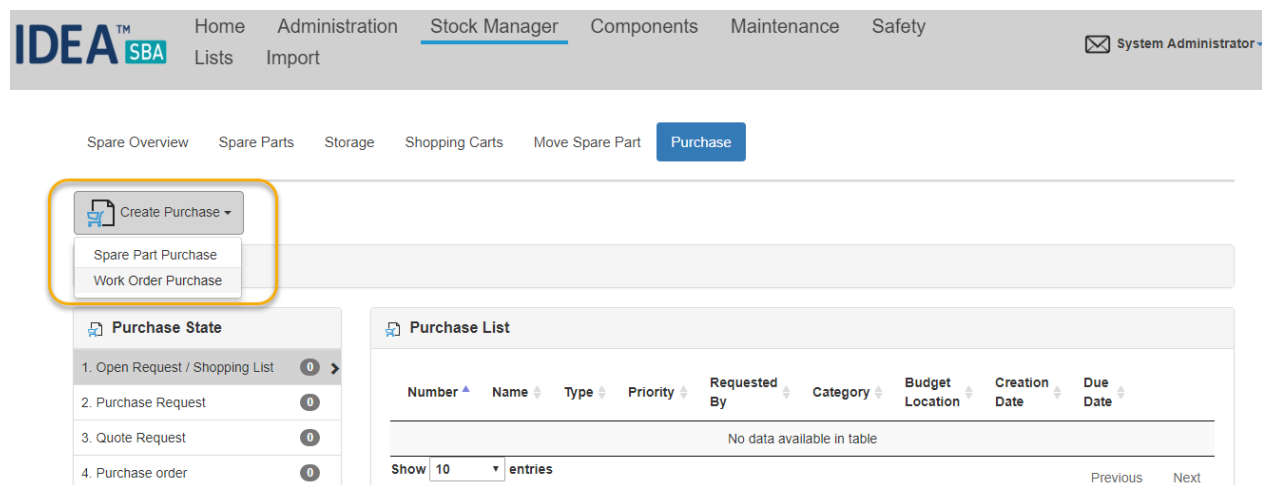


Figure 3 Create work order purchase

Of course, closing a purchase process for a work order is different from one for spare parts, SBA will allow you to book the costs on a maintenance task. You have to choose if you want to add the costs to an existing history record or if you want to create that record with the costs in it.

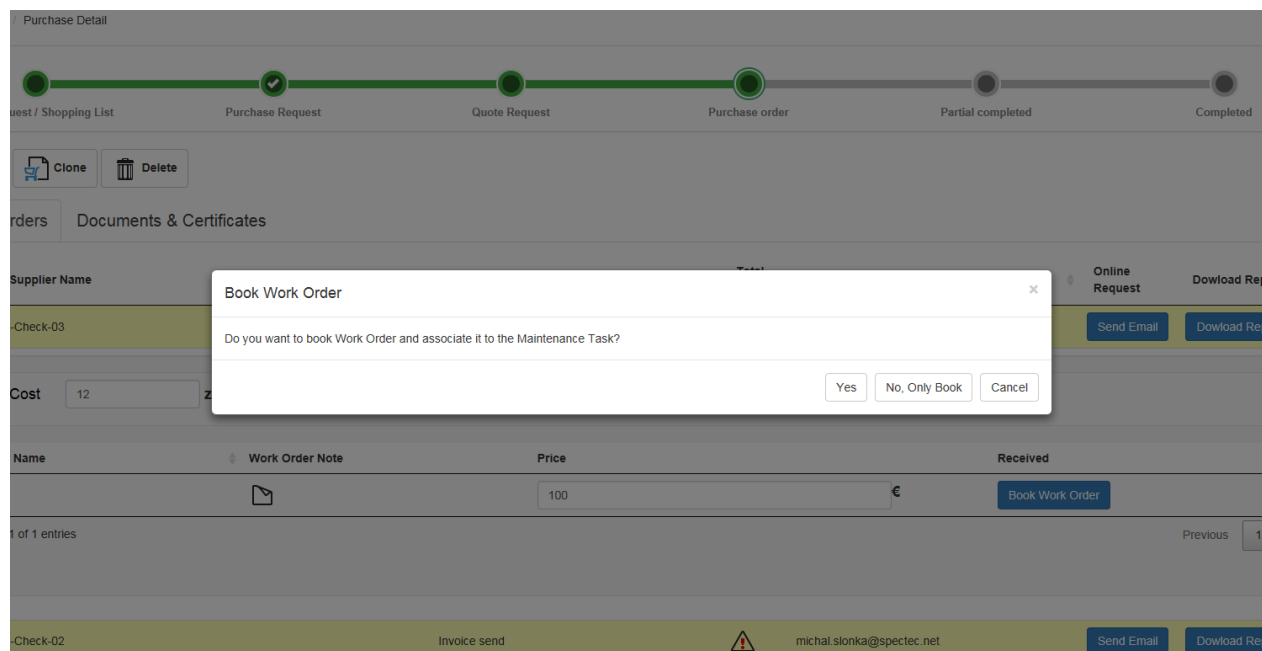


Figure 4 Book a work order

## Shipment

Both spare part and work order purchases are included in the new shipment feature with which you can track multiple shipments by purchase process.

The shipment data is generated automatically and allows you to add invoice related data and any documents like delivery tickets to it. Shipments are available as soon as the first spare part or work order is received.

Target Location	Work Order Name	Category	Amount	Price	Accounting Code	Invoice Number	Invoice Date	Detail
M/Y Sydney	Work01	WOCat18	1	165.95 zł	SY	07112017003	07-11-2017	
M/Y Sydney	Work03	WOCat06	1	50 zł	SY	07112017002	07-11-2017	
M/Y Sydney	Work02	WOCat02	1	211.88 zł	SY01	07112017001	07-11-2017	

Shipment Detail

Detail

Document

Document Upload

Invoice Detail

Invoice Number

07112017001

Invoice Date

07-11-2017

Invoice Due Date

30-11-2017

Accounting Code

SY01

Price

211.88

zł

Shipment Detail

Target Location

M/Y Sydney

Item Name

Work02

Amount

1

Close

Confirm

Figure 5 Shipment tab and popup



## Maintenance costs

It is now possible to track the time and costs for each maintenance task in your fleet. To support this, SBA offers hourly rates that can be connected to a user position and is shared between all crew members using this position. If used, SBA will calculate the total costs automatically based on the entered amount of time.

To generate new hourly rates just use the creation wizard located on the hourly rate page in the maintenance section of SBA.

Figure 6 Hourly rate overview page

As mentioned above, hourly rates can be connected to user positions. Beside that they contain the following information:

- Name: free text will be displayed on all pages using this hourly rate
- Description: free text will only be displayed on detail pages
- Category: free dropdown used to structure and arrange your data
- Costs by hour: costs in fleet currency by hour
- User position: if set, only users of this position can use the rate

## Maintenance costs and time

We try to offer as much options as possible to use SBA, because of that you can also manually type in the costs of a task and not use the hourly rates but still track time and costs.

**Maintenance Time Tracking**

Please set all information about Maintenance Time Tracking. Set Hours and Minutes needed for completing your task. You can select one of defined Hourly Rates for auto calculating the Maintenance Cost, if you leave this field empty you can put Maintenance Cost manually

**Used Time** Hour amount [h] Minutes amount [min]

**Hourly Rate** [dropdown]

**Maintenance Cost** Hour amount zł

Calculated by SBA if hourly rates are used

Figure 7 Complete a task time/cost step

Of course, you can also update existing records or even change the details for cost/time at a later stage using the new build in history view for maintenance as shown below.

**Maintenance History Detail**

History Detail Used Spares Time Tracking Documents Upload Documents

**Used Time** 15 [h] 0 [min.]

**Hourly Rate** [dropdown]

**Maintenance Cost** 190.5 €

Save Close

Figure 8 Maintenance history view, time and costs





## Spare request

With SBA 2017.5 we added two new layers with regards to spare part management for your different vessels. The goal of this change is to provide a way to easily limit the possible big amount of spare parts only to the really needed subset for a vessel.

The first change is directly located on the spare part detail page. The new switch “Able to request” allows you to enable or disable this spare part for any vessel in any request. If this switch is set to off, it will override any other configuration.

<b>Spare Name *</b>	<input type="text" value="Bearing 255678"/>	
<b>Spare Description</b>	<input type="text" value="Spare Description"/>	
<b>Spare Group</b>	<input type="text" value="Bearing for Pumps"/>	<input type="button" value="x"/> ▼
<b>Spare Serial</b>	<input type="text" value="255678"/>	
<b>Manufacture Part</b>	<input type="text" value="255678"/>	
<b>SupplierPart</b>	<input type="text"/>	
<b>Spare Manufacturer</b>	<input type="text" value="Select a value"/>	<input type="button" value="New"/>
<b>Spare Critical</b>	<input type="checkbox"/> Off	
<b>Able to request</b>	<input checked="" type="checkbox"/> On	

Figure 9 Spare request switch

## Spare parts for components

The second level that was added with this release allows you to connect any number of spare parts with equipment in your fleet. This list of spare parts will be added to the list of possible spare parts you can request by default.

IDEA™ SBA Home Administration Stock Manager Components Maintenance Safety System Administrator

Components / Component Detail

New Task Change State New Work Order

Component Detail Component History Component Hour Counter Spare Part Maintenance History

Maintenance Intervals Documents & Certificates

Add Spare Part

Name	Group	Serial	Manufacturer
Gasket 57685	Gasket for Pumps	57685	Johnson

Show 10 entries Previous 1 Next

Showing 1 to 1 of 1 entries

Save Back To List

Figure 10 Spare part list for a component

Of course, we try to hand you as many options as possible to complete your work. We also added a way to use the request style that was in place before that allows you to share your complete spare part catalogue - simply grant the new permission “Request All Spare Parts” to all users that should request spares.



## Spare deletion

With 2017.5 you get a new wizard to completely remove spare parts from your fleet. Users with the needed permission will see the delete icon/button on the related pages (spare part list, spare part detail page).

Filter						
Name	Group	Serial	Manufacturer	Supplier		
Bearing 255678	Bearing for Pumps	255678				
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					Previous	Next

Figure 11 Spare part delete function on overview page

A spare part can only be deleted if it is not used in an active request/movement and none completed purchase order. If you delete a spare part, all quantities will be removed from related storages and tasks that make use of this spare part will be updated to no longer use it.

All pages will now use the form shown below:

Figure 12 Create/Select a supplier



## 3<sup>rd</sup> party support

### Maintenance

We added a new interface that can be used to interact with a wide range of monitoring systems or can be easily changed to fit your needs.

Beside the possibility to update running hours we also added a system that allows external systems to raise tasks in your SBA portal. Either raising events or even creating one-time tasks is not a problem at all.

### Purchase

We also worked on the integration of our purchase system into different other systems, as more or less all purchase related exports are different. The current base can be easily changed and adopted to any required format or structure.

### New service endpoint

SBA now offers a new service endpoint for server to server or hardware communication. One of the advantages of the new endpoint is that we can easily extend the functionality without the need to change other interfaces (for example our mobile client interface).



## Notification file exchange

Notifications now allow a user to connect a list of files to a message. As before the message can be sent to a single user or a complete vessel/warehouse.

You can always from any page in SBA create a new notification. Just use the top right context menu and click "Send Notification". Of course, you can also use the button located in your inbox, either Home -> Notifications or if you have new notifications by just clicking on the letter icon next to your name.

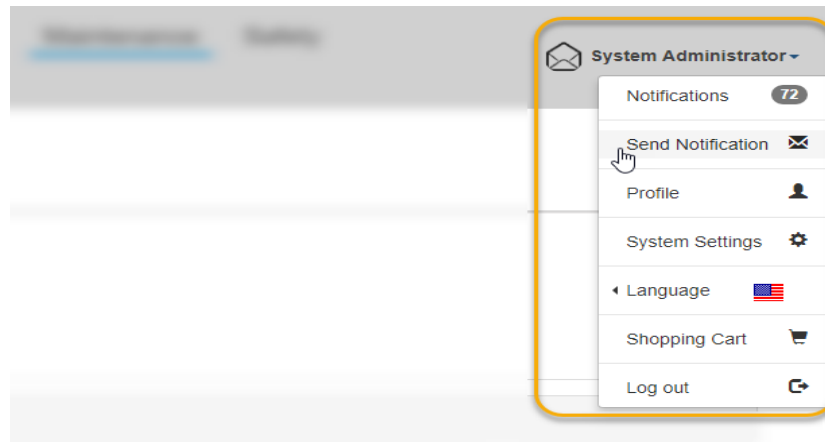


Figure 13 Top right context menu

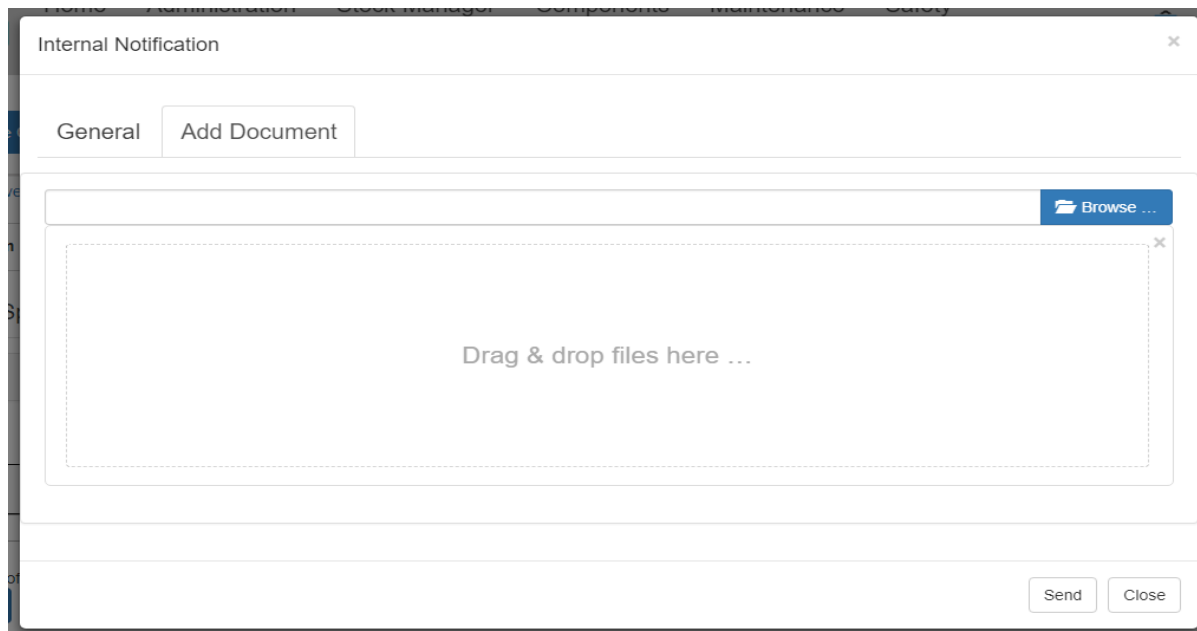


Figure 14 New notification add files



## SBA Mobile – NFC

SBA Mobile 2017.5 got different updates to support the changes we introduced for SBA Web. This includes the maintenance time and cost tracking, hourly rates and updates for our backend to support current software and hardware options used by Android.

The major and unique feature for SBA Mobile is the support of NFC tags, sticker or any type of NFC token.

What is NFC

NFC chips are small and flat chips that do not require a power supply to operate. They are powered wireless by the phone as soon as you are close enough to the chip. These chips can store information and communicate with your phone. Currently only Android supports the usage of NFC chips by any developer.



Figure 15 NFC Tags

## Advantage over barcodes

NFC chips do not require an optical scanner and will work under all light conditions. Depending on the type of the tag you can even wash them or expose them to high temperatures without harm. A tag once configured will work on all phones without the need to synchronize any data between your devices - all needed information are stored on the chip.

To use NFC your phone needs an NFC-ready built in which most of the current Android phones and tablets already have. In case you are not sure check the manufacture page or contact us and we try to get the information for you.

Of course, you can still use barcodes and you can even combine the two worlds to get the best out of both if you want to.

## How to use it

Got a new tag? Great, just hold your phone to it and in two steps you have configured it with a new function that you want.

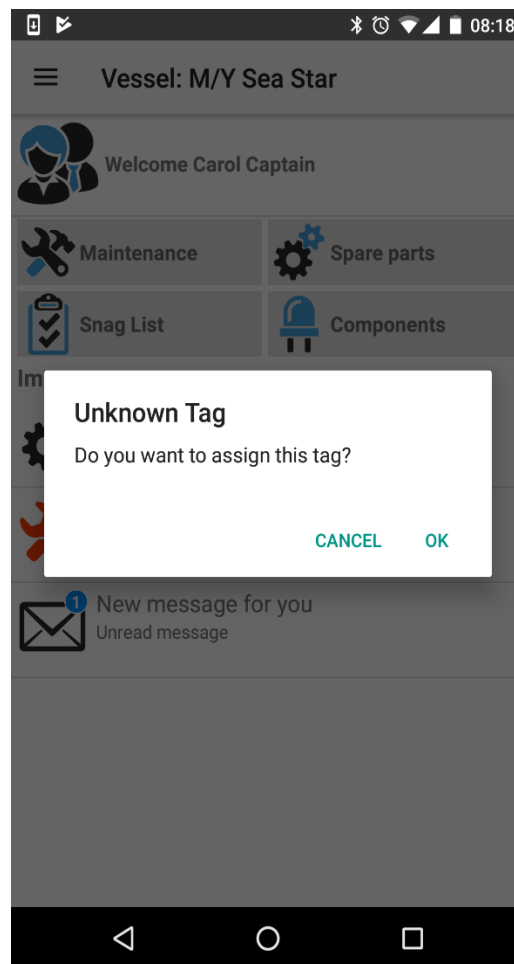


Figure 16 New tag found



How to use it

Now SBA will show you a list of actions that you can connect with this tag, for example you could connect it to your main engine.

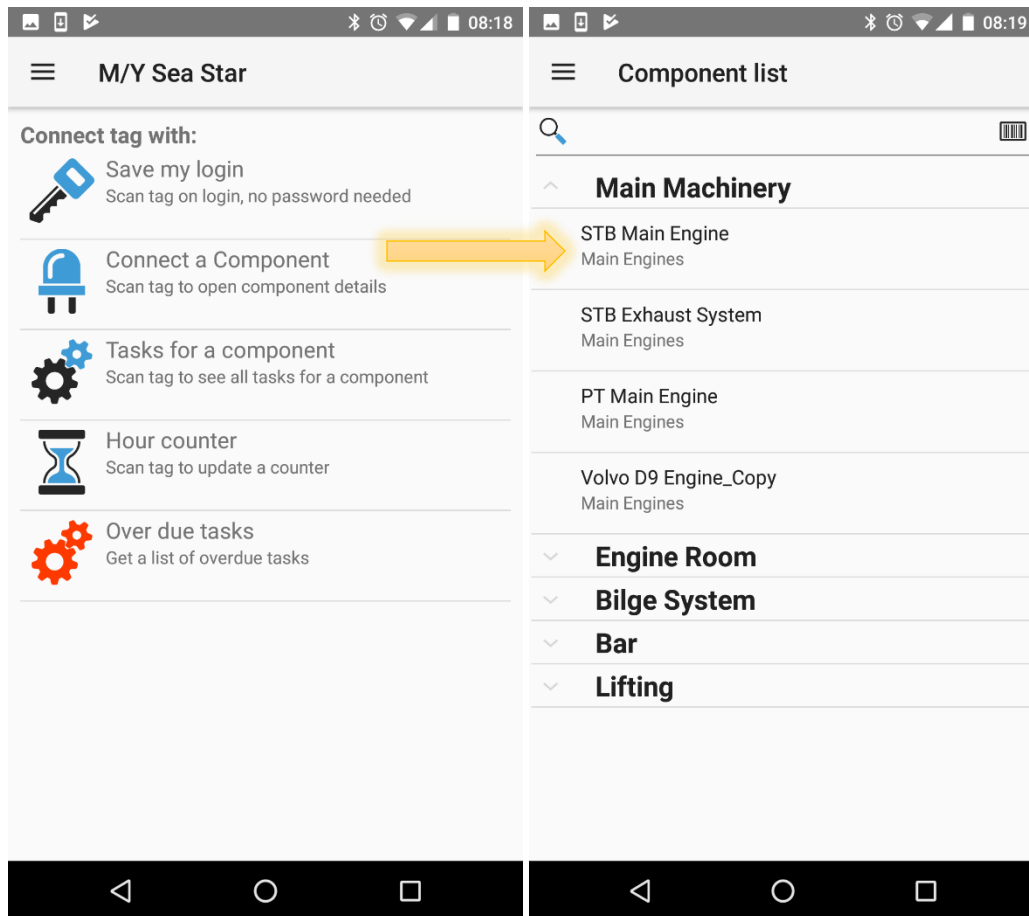
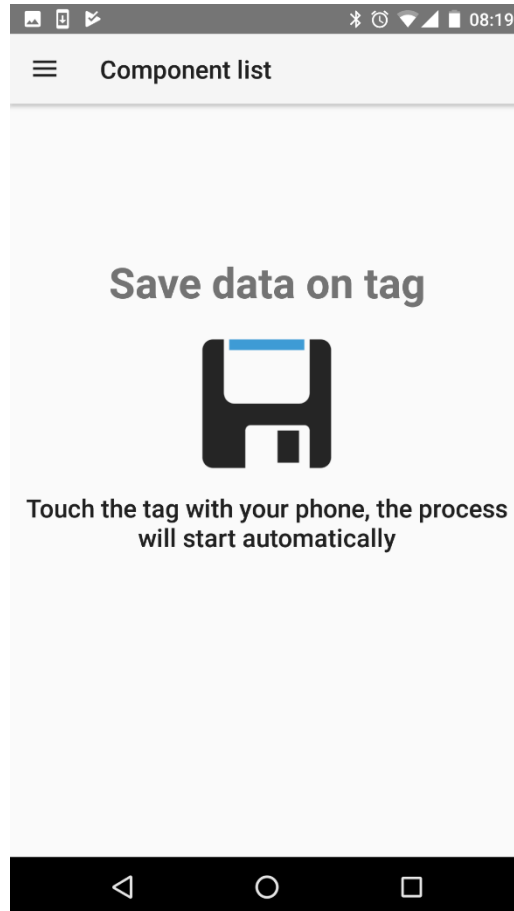


Figure 17 Connect the tag with a component

## How to use it

Please note that you do not have to hold the tag the complete time to your phone. As soon as you see the screen below SBA is ready to write data to the tag. Just hold the tag to the phone and wait until the screen disappears.



*Figure 18 Waiting for tag to write data*

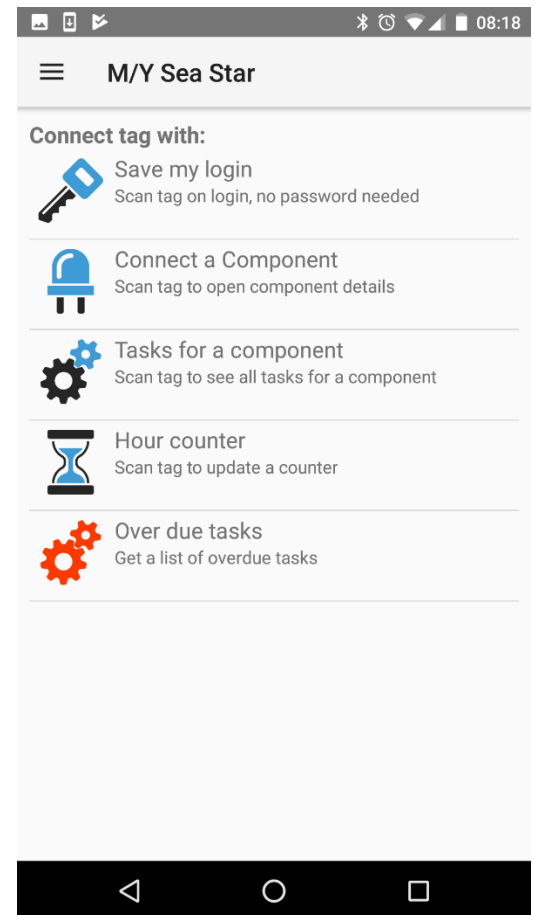
Great, that was all you need to do! You can now at any screen in SBA hold the phone to the tag and SBA will show you the details of your component.

## Available NFC functions

As shown on the image, you can connect a tag with the following options:

- Create a login token
- Connect it to a component
- Connect it to all tasks for a component
- Connect it to an hour counter
- See all overdue tasks for a component

Please note that you can override the current function of a tag at any time, just expand the main menu and choose “Write Tag”.





## Quick changes

- New filter option called "Type" added to purchase overview page
- Changed type of filter field called "Purchase Number" to a multiselect drop-down list
- Hide the button from "Movements" tab in case that the "Perform Movements" permission is disabled
- Wrong view of the multiselect filter fields in some cases
- Clear layout coordinates after moving a component between locations
- Filter from fleet overview do not show the right subset of tasks
- Improve the location remove wizard - add actions for purchases, snag list tasks and drills
- Allow to update the complete price of an order if you have the price update permission
- Show spare request with missing QT in the overview in red
- Add a field to the address database called "Internal Name"
- Extend the purchase overview filter
- Display proper values inside the "Critical" filter at the component overview page
- Fixed error after loading the component overview page and click on the workflow button
- Duplicated field inside the supplier details in the "Supplier" tab at the spare part detail page
- Solved a problem with saving changes for the spare parts which have default location set as location for which the current user has no permissions