IDEA YACHT Release 2023.1

In this document we will showcase the most notable changes for IDEA YACHT 2023.1.

Please note, IDEA YACHT will not to be automatically updated except if you are using an IDEA Cloud based solution without replication. To arrange an update please contact support@idea-data.com

If you want to try out this IDEA YACHT version first, please have a look at our public demo page:

https://demo.ideavio.com

Contents

2023.1 Key changes

With 2023.1 IDEA YACHT introduce the all-new IDEA Snag List module, allowing a new level of corporation and flexibility with your IDEA products. No matter if you want to track to-do items for different departments, document your next refit or keep any overview about warranty claims, the IDEA Snag List module can support you in the process. Please find below an overview about the key features included:

- Create custom workflows for your snag lists, each workflow can have multiple states

- Permission by states, setup how can close or create a Snag List entry in your workflows

- Overview page for each workflow, filter Snag List entries to get a quick overview

- Use the two new widgets for your dashboard to create your custom Snag List view

- Snag List entries can be connected to multiple equipment from your vessel database

- Connect one-time or periodic tasks to your Snag List entry

- Use the Android or iOS app for idea yacht to work with Snag List on the go, completely offline

- Each Snag List entry can mark multiple locations on your layout drawings (or on multiple drawings)

- Attach files to Snag List entries

- Add notes or replies to notes to communicate and work together on a Snag List entry

- Use the completely new IDEA CLOUD portal to share any number of snag lists with any body (like a 3rd party contractor or shipyard) no need to provide access to your onboard installation or IDEA YACHT instance *more on that later
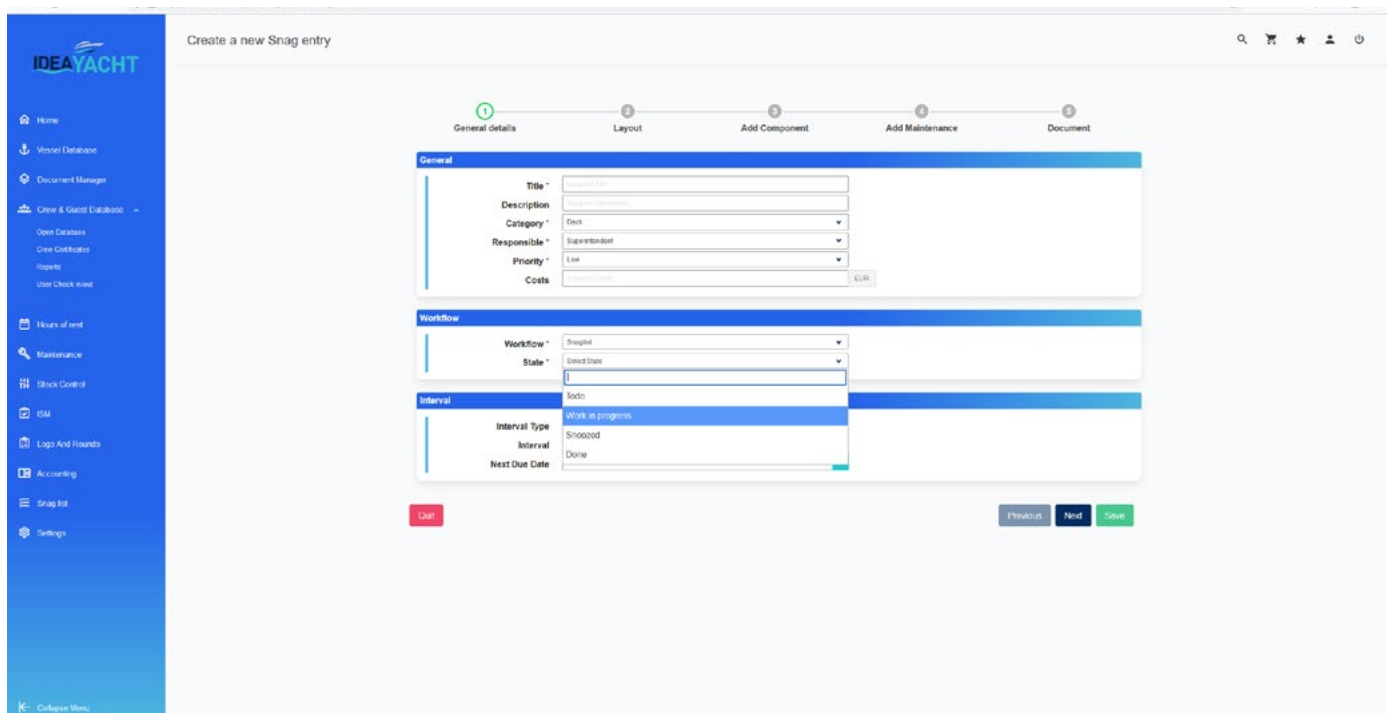
IDEA Snag List

License model

Our latest module IDEA Snag List is available as an added subscription to your IDEA YACHT software. If you wish to experience the benefits of the module and how it can help streamline your onboard processes, then get in touch with us at sales@idea-data.com for a one month free trial.

IDEA Snag List is available for replication, therefore, it can be cloud only, or installed onboard only – if your vessel does not allow for cloud-based solutions. All subscriptions come with access to the IDEA Snag List cloud, which we will be releasing in batches following the initial IDEA Snag List release.

Setup Snag List

To create a snag list entry, first you will need to create a workflow. Workflows are built with multiple states. Each state can define who can create and entry in it, and who can close it; this can be determined by their position and seniority.

You can create as many workflows as you want, and Snag List entries can be transferred between these workflows. IDEA YACHT comes with a premade workflow, with predetermined states; to-do, work in progress, snoozed, and done.


To create a snag list, you must assign it to a category, which can identify the department, location or nature of the snag. IDEA YACHT comes with predefined categories of; Administration, Deck, Engine, External, and Interior.

Workflows & Permissions

You can easily define who can alter snag lists to ensure that crew remain accountable for the completion of tasks and repairs. These permissions are changed in the general permissions editor in IDEA YACHT.

To change permissions to specific workflows, this can be done in the workflow manager.
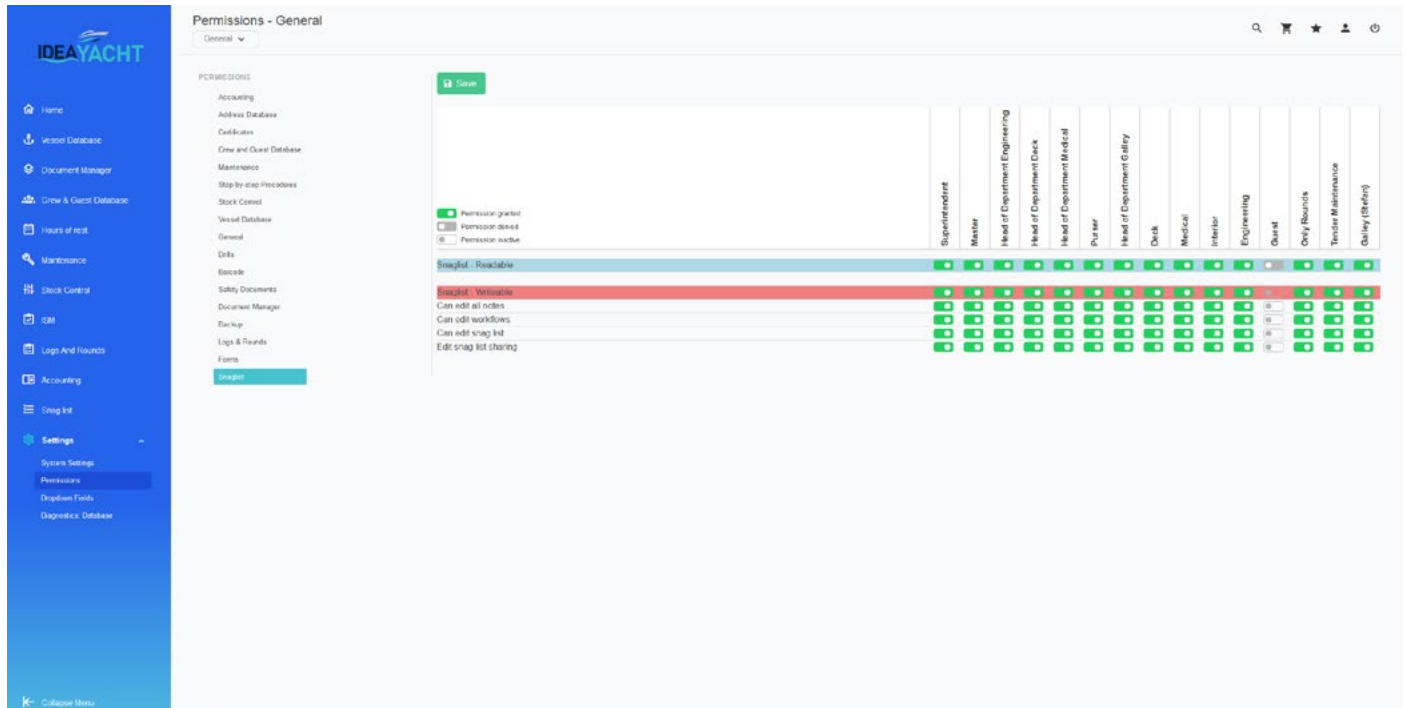

Overview page

The Overview page provides you with a comprehensive view of your snag lists. You can navigate to this in the menu on the left-hand side. Here we can filter your snag lists based on the criteria you provide in the fields.

With cloud share enabled share multiple snag lists at once with multiple people, you just need an email *will be unlocked soon.

From the overview page you can also create a new snag list using the creation wizard - with more information later in the document.
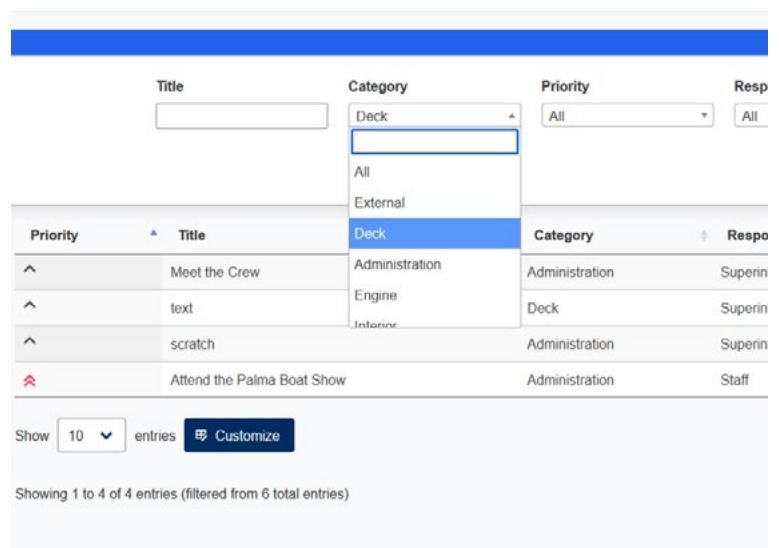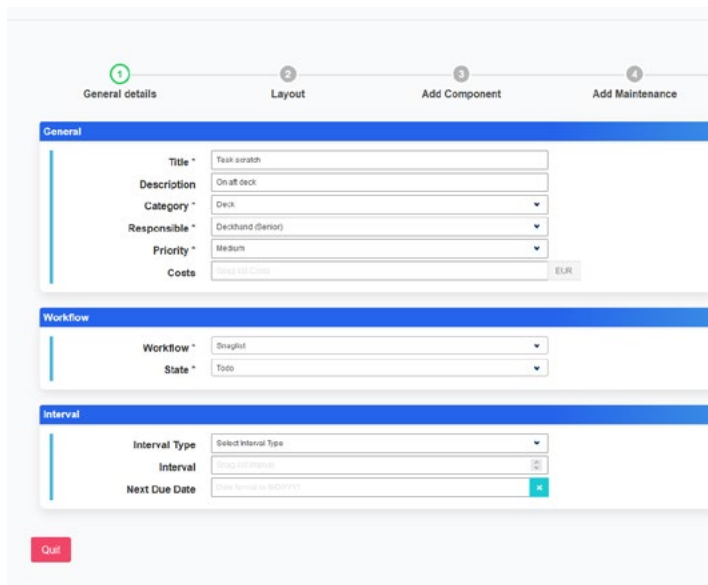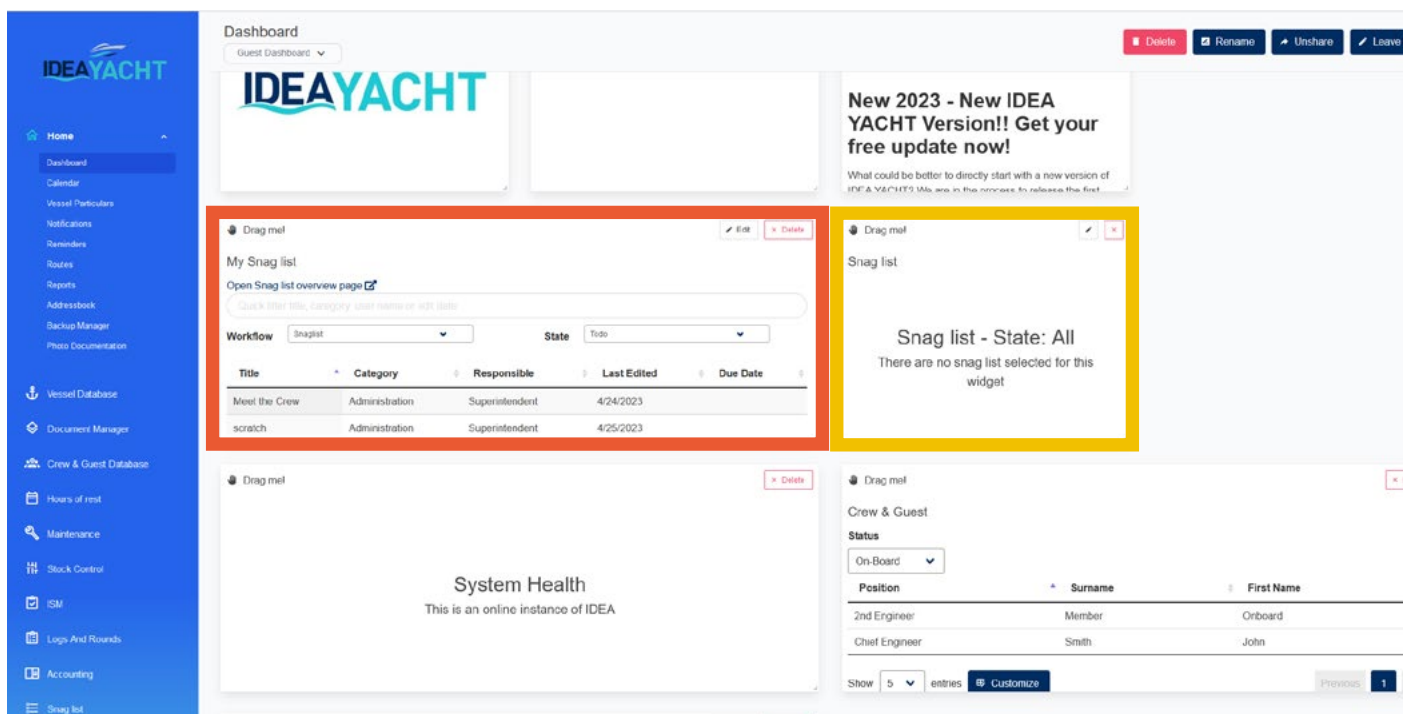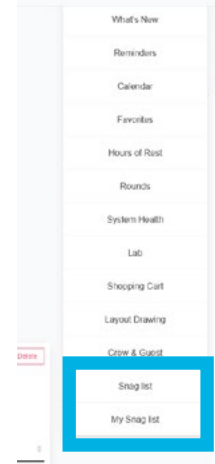
Dashboard widgets

You can select the "Snag List" widget or the "My Snag list" widget. You can filter for Snag list entries where your current position is marked as responsible.

Both widgets can be initialized with a workflow and state but allow switching them in the dashboard.

Both widgets have a full text search and allow you to jump to the snag list detail page.

Creation wizard

You can save the wizard at any point, no need to complete it to the end if you are waiting for or don't require further information.

A snag list must have a name, target workflow and state, and you can add any number of components and tasks

You can mark any number of layouts for points related to this snag list.
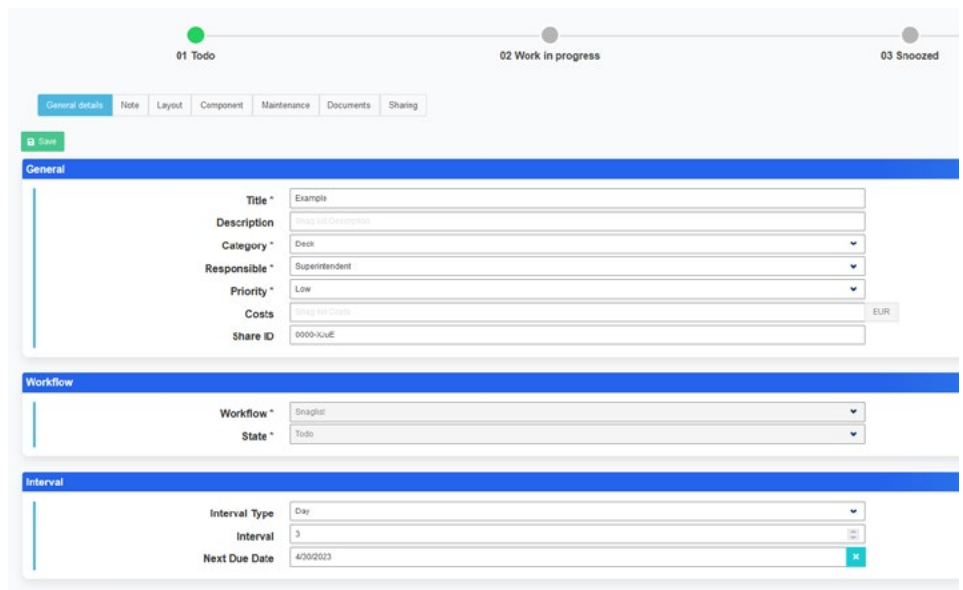
Adding a task will also add the component to the list.

You can upload any number of files to your snag, from pdf and text files, to videos and photographs of the issue.

You can also assign snag list entries an interval.
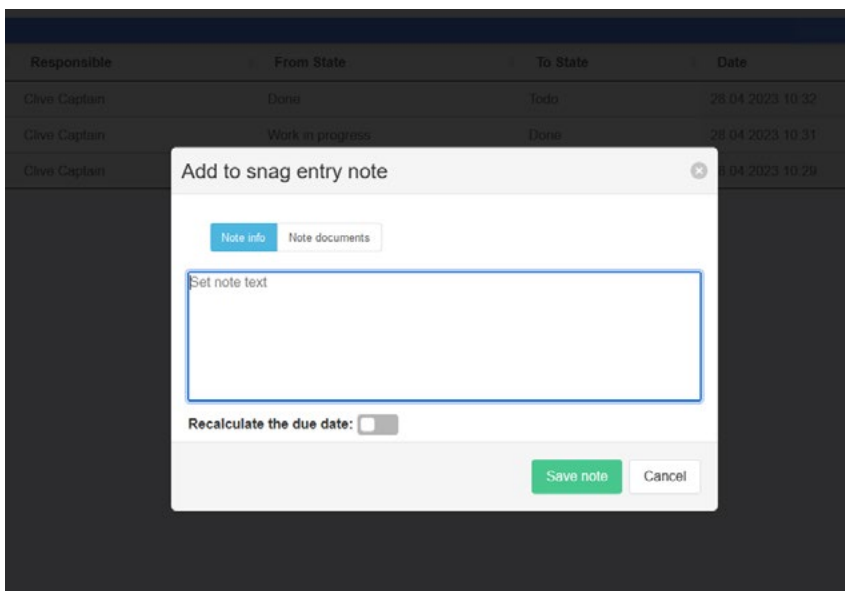
Snag List detail page

The Snag List detail page provides you with a complete view of a snag and allows you to:

- See the current state of snag in a workflow

- Delete, move a snag entry

- Share with cloud / manage shares

- Add a note

- Browse through the data based on the different tabs

- You can add/remove further components and tasks for the Snag List entry

Notes & replies

To ensure good communication practices amongst crew whilst snagging, snag entry notes are a good way of ensuring all communications are in one place. You can create new notes and attach files to elaborate on conversations.

To easier navigate you can reply to a note (with both text and files), much like other messaging apps.

Moving a snag from one state to another will create a note, and you may use a note to advance the schedule for a snag .
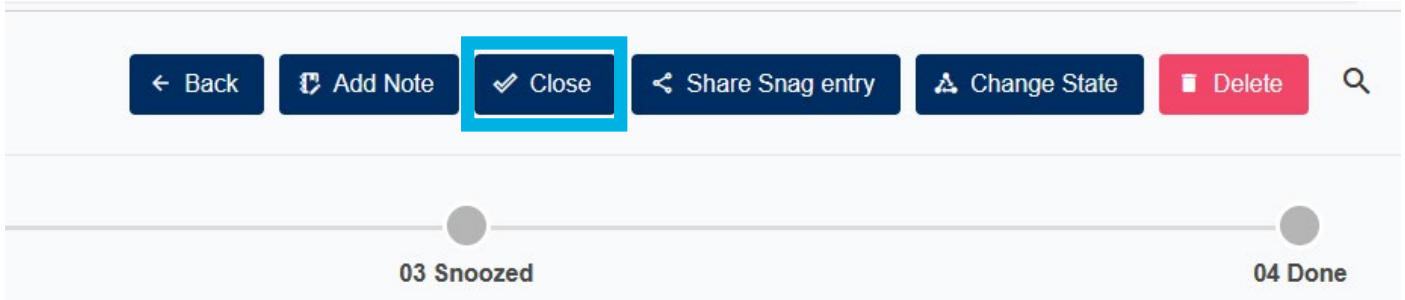
Closing a Snag List entry

If you have the adequate permissions, you can close a snag from the detail page

Snag List entries can be re-opened if closed in error or if there are additional actions to be completed for a snag. If the Snag List entry is in the closed state it is read-only and cannot be edited. You need to have permission in the state that matches those in the snag list to close the snag.

Mobile Snag List

In the IDEA YACHT mobile app you can:

- Find Snag lists using the global search

- Create new snag list entries

- Edit existing snag list entries

- Create new notes or reply to existing once

- Download and attach files to the snag list or notes

- Modify layout drawing points

- Quick creation wizard (like on the web) to generate new Snag List entries
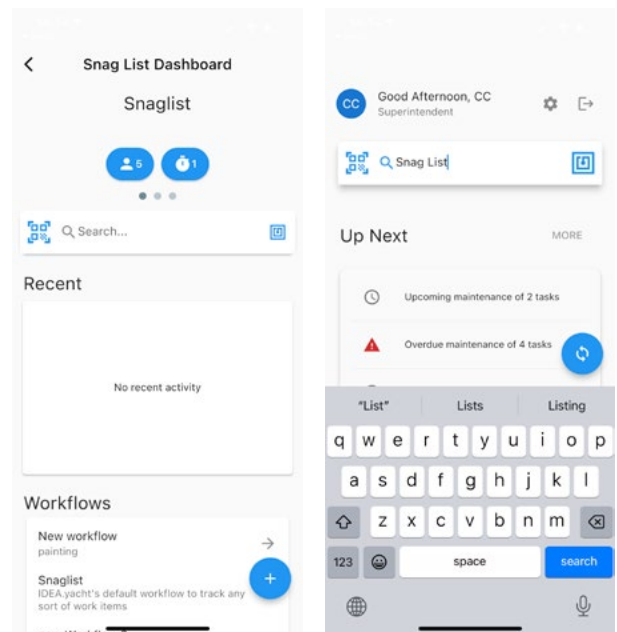
NFC Support

You can use the IDEA NFC tokens to quickly open up a Snag List record by just putting your phone to the token.
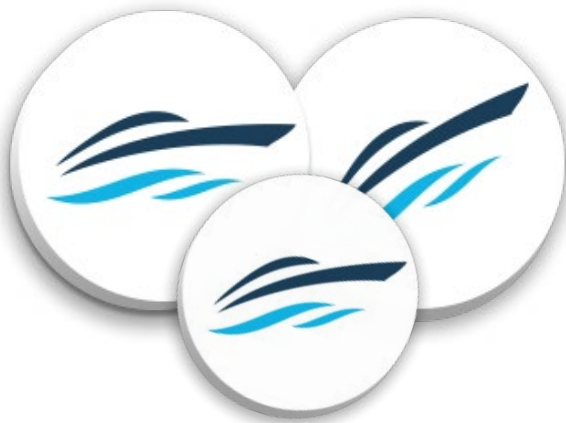
IDEA Cloud

Alongside the launch of IDEA Snag List is the launch of IDEA Cloud.

IDEA Cloud allows you to share information with anyone, whether you have an onboard installation of IDEA YACHT or cloud based. This means that you can communicate and share information with simply via providing an email address. This information can be logged and shared whether you are online or offline, such as purchase orders and notes etc, to enable the completion of snags and allowing true versatility no matter where you are on a vessel.

IDEA Cloud comes with all IDEA Snag List subscriptions and will have extra finctionality added in future releases.