



## IDEA YACHT Release 2023.3

In this document we will showcase the most notable changes for IDEA YACHT 2023.3.

**Please note, IDEA YACHT can now be automatically updated if you have an online, non-replicated installation and our maintenance plan via our new auto-updater feature.** If you need to arrange an update please contact [support@idea-data.com](mailto:support@idea-data.com)

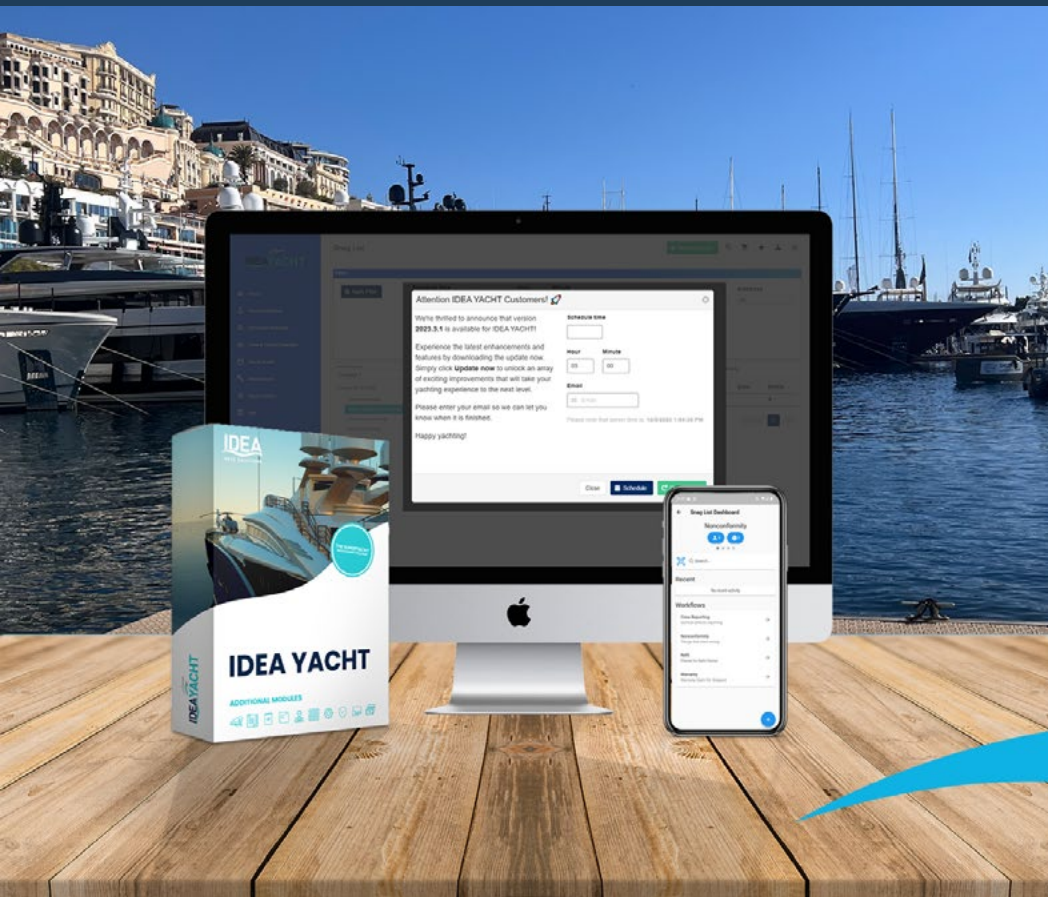
If you want to try out this IDEA YACHT version first, please have a look at our public demo page:

<https://demo.ideavio.com>

## Contents

- [2023.3 Key changes](#)
- [IDEA APP](#)
- [IDEA WEB](#)

## IDEA YACHT Release 2023.3



# UPDATE RELEASE 2023.3

## 2023.3 Key changes

Update 2023.3 IDEA YACHT sees big improvements to our IDEA YACHT App, including more functionality for using NFC Tags, a brand-new module for Standard Operating Procedures, and a raft of improvements and bug fixes. Our web-based platform sees some big developments to our Forms module, a new auto-updater for our software, a new Muster List module, and full support for more Spectro|Jet-Care fluid sample types, amongst a host of other additions and improvements to IDEA YACHT.

## IDEA YACHT WEB

### **\*NEW FEATURE\*** Update Pilot – Automated IDEA updates:

- IDEA now introduces the Update Pilot feature, which automates the update process. Users will receive prompts to schedule and run updates in the background.
- This results in quicker updates and fixes delivered directly to your onboard server, although currently limited to non-replicating vessels.
- To utilize this feature, an active support plan is required.

## IDEA YACHT Release 2023.3

### Forms support for Tables:

- The update includes comprehensive support for creating and managing forms with built-in editors.
- A new Table control allows the creation of tables with various elements like dropdowns and text boxes.
- Users can implement approval flows and segment forms into multiple sections, each signable by different crew members.
- Forms are now fully accessible on iPads, phones, and web browsers.
- Optionally, you can connect forms to existing documents (e.g., Word files) for a seamless transition to IDEA.

### **\*NEW MODULE\*** Muster List:

- A new module for creating Muster lists has been introduced, allowing users to configure their own muster lists with stations and duty assignments.

### New budget approval matrix:

- IDEA now supports multiple levels for budget approval, enabling complex configurations.
- For example, you can set rules such as purchases up to 1k require no approval, while those between 1k and 5k need department head approval, and purchases above 5k require captain approval.
- Budget codes/accounting codes can also be optionally linked to purchase orders, improving financial tracking.

### **\*NEW MODULE\*** Standard Operating Procedures (APP & WEB):

- A new module has been introduced within the app, allowing users to access and view Standard Operating Procedures (SOPs) directly from their mobile devices.
- SOPs can be designed and configured in the web interface, providing flexibility and accessibility.

### Crew and guest forms/reports updated to reflect current IMO FAL Forms:

- Forms and reports related to crew and guest information have been updated to align with the latest International Maritime Organization (IMO) FAL Forms standards.

## IDEA YACHT Release 2023.3

### Full support for ALL Spectro JET Care sample types:

- IDEA YACHT Web now provides comprehensive support for various Spectro|JET-Care sample types, including oil samples, hydraulic samples, fire mist water samples, fuel samples, and fuel verification samples.

### Updated Forms controls - using tables in your forms (APP & WEB):

- This update introduces enhanced Forms controls, enabling the use of tables within your forms.
- In IDEA YACHT Web, this means you can now create and customize tables within your forms, providing better organization and data structuring.

### \*NEW PRODUCT\* IDEA Direct Order

- A brand-new functionality in IDEA YACHT purchasing pages to allow vessels to request order quotes directly from vendors.
- Seamlessly order spares, parts and inventory from within IDEA YACHT and see comments from your vendors.
- IDEA YACHT will create a quote request from the purchase order and wait for vendor to price the purchase order items and propose an offer.

## IDEA YACHT APP

### NFC support for forms:

- With NFC support, you can swiftly access your frequently used forms by scanning an NFC token.
- This feature streamlines the process of accessing and filling out forms, making it convenient for users on the go.

### New round control:

- The new round control brings significant performance improvements, ensuring smooth operation even when dealing with rounds consisting of 500+ points.
- Users can now pick the next entry point from a list, eliminating the need to navigate through each point individually. This enhances efficiency and usability.

## IDEA YACHT Release 2023.3

### **Improvements and fixes based on your feedback:**

- Thanks to valuable client feedback, a total of 47 issues have been addressed and resolved in the app.
- It's worth noting that sending error reports plays a significant role in identifying and rectifying issues, so your feedback is greatly appreciated and beneficial in enhancing the app's performance and reliability.

### **\*NEW MODULE\* Standard Operating Procedures (APP & WEB)**

### **Updated Forms controls - using tables in your forms (APP & WEB)**

**SEE FOLLOWING PAGES FOR FURTHER DETAILS**

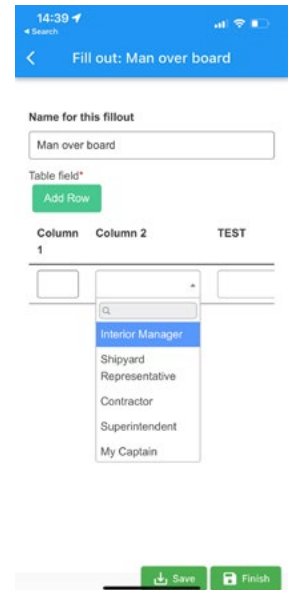
## IDEA APP

### Updated Forms Controls with Tables:

This update introduces improved Forms controls, allowing you to incorporate tables into your forms.

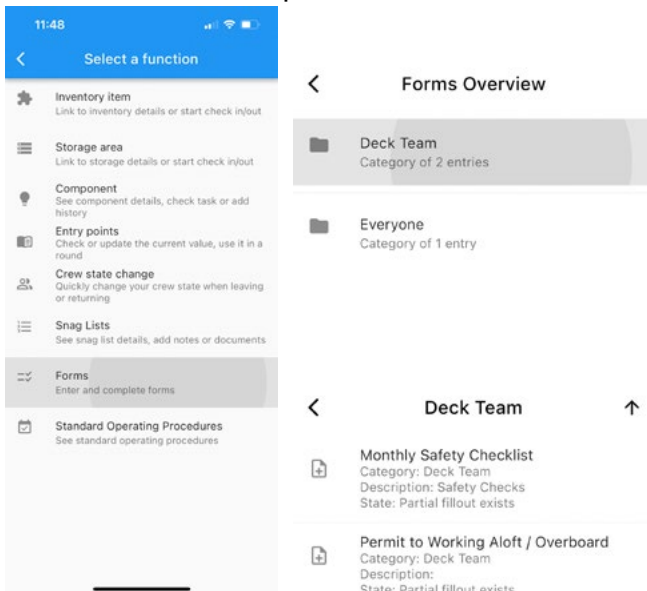
This enhancement enables better organization and data structuring within your forms.

For users of the IDEA YACHT Web, you can now create and customize tables within your forms, offering greater flexibility in managing your data, please note that these are not editable within the app.



### NFC Support for Forms:

We've added NFC (Near Field Communication) support to streamline the form-filling process. With NFC support, you can quickly access your frequently used forms by simply scanning an NFC token. This feature is designed for users on the move, making it more convenient than ever to access and complete forms.



To assign an NFC Tag to a form, head to your settings, click Forms and select the form you would like to allocate to your tag, then scan the NFC Tag to upload and assign it.



### New Round Control:

Our new round control in IDEA YACHT comes with significant performance improvements. It ensures a smooth experience, even when dealing with rounds that consist of 500 or more points. Users can now easily select the next entry point from a list, eliminating the need to navigate through each point individually. This enhancement enhances both efficiency and usability.

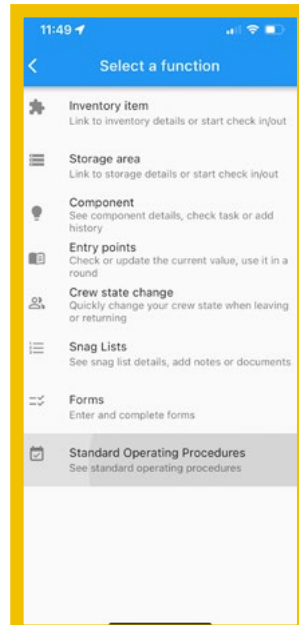
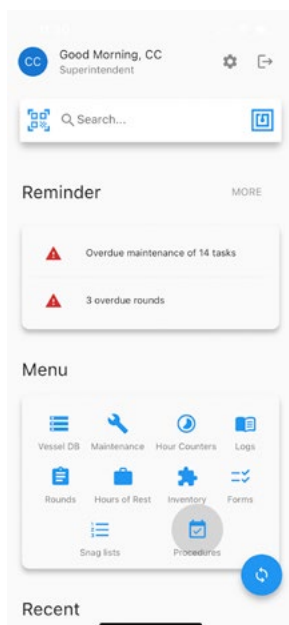
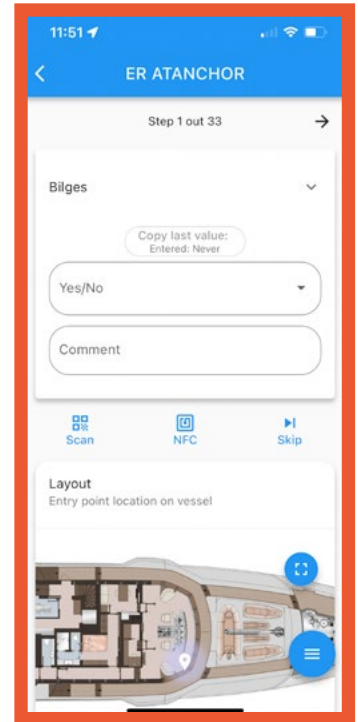
## IDEA YACHT Release 2023.3

To navigate the new view, select Rounds from your APP menu, you will see the layout has changed and you can view your GA, and also any comments made on the round itself.

### New Module: Standard Operating Procedures (SOPs) (APP & WEB)

We've introduced a brand-new module within the app, allowing users to access and view Standard Operating Procedures (SOPs) directly from their mobile devices. SOPs can be designed and configured using the web interface, offering flexibility and accessibility. This module streamlines SOP management and access.

Accessing your Standard Operating Procedures in the IDEA YACHT APP is simple. Find the icon on your dashboard, from here you will be taken to the next page where you can organise your procedures into folders. Click into the folder and you will see all your procedures in that section. You can assign pictures to the procedures and can **turn these on and off via the APP settings**.

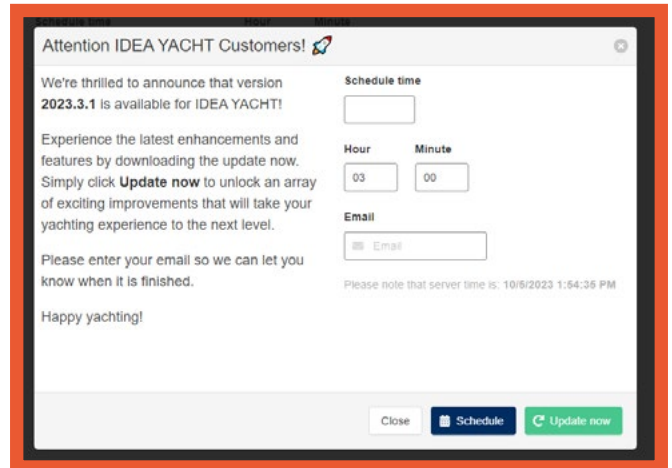


## IDEA WEB

### **\*NEW FEATURE\*** Update Pilot – Automated IDEA updates:

IDEA has introduced the Update Pilot feature to automate the update process. Users will receive prompts to schedule and run updates in the background, ensuring quicker delivery of updates and fixes directly to your onboard server.

It's important to note that this feature is currently limited to non-replicating vessels. To access this functionality, an active support plan is required.

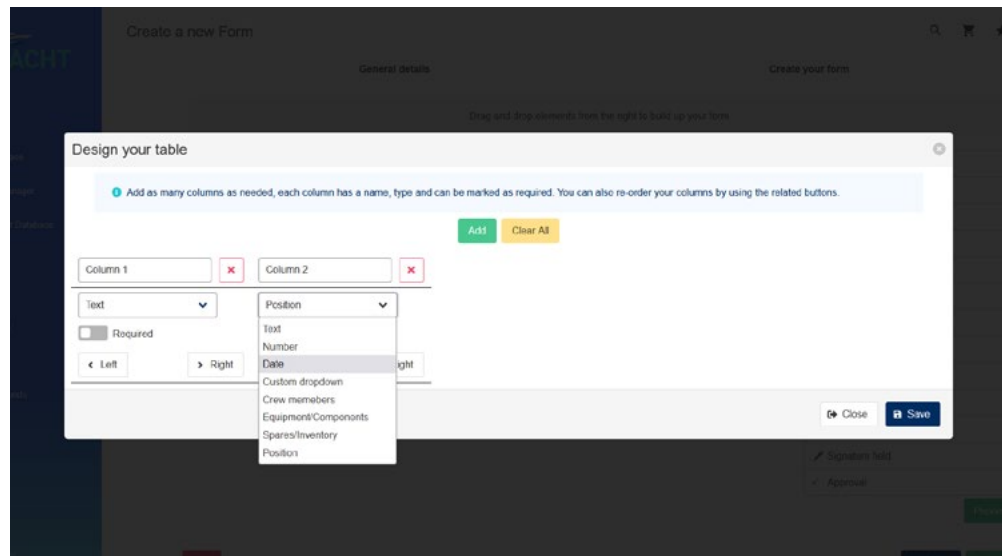


When an update is available **you will see this prompt**. You can either update immediately or schedule in an update for later.

### Forms support for Tables:

This update brings extensive support for creating and managing forms using built-in editors. A new Table control allows you to easily create tables with elements like dropdowns and text boxes.

You can now implement approval workflows and divide forms into multiple sections, each signable by different crew members.



These forms are now accessible on various devices, including iPads, phones, and web browsers. Additionally, you have the option to connect your forms to existing documents, such as Word files, for a seamless transition to IDEA.

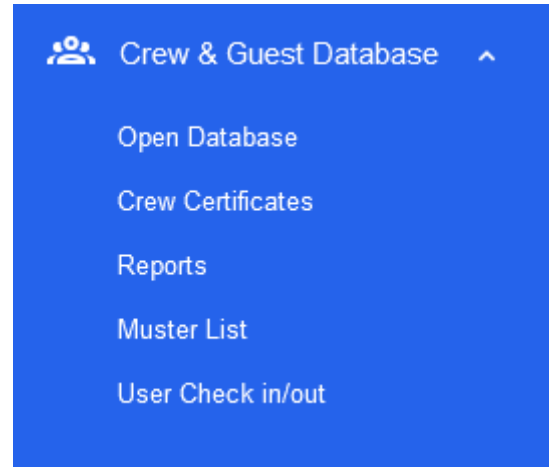


## IDEA YACHT Release 2023.3

### \*NEW MODULE\* Muster List

A yacht muster list is a vital safety document that details the roles, responsibilities, and locations of all passengers and crew members on a yacht. In the event of an emergency, it serves as a checklist to account for individuals and ensure their safe evacuation or rescue, enhancing onboard safety. We've introduced a new module for creating Muster lists, giving users the ability to configure their own lists with stations and duty assignments. This module streamlines the management of muster lists.

You need the Crew and Guest module to enable it. If you are interested in consolidating and streamlining your Muster List, then contact our sales team on [sales@idea-data.com](mailto:sales@idea-data.com)



### New budget approval matrix:

IDEA now supports multi-level budget approval, allowing for complex configurations. For example, you can set rules like purchases up to 1k require no approval, while those between 1k and 5k need department head approval, and purchases above 5k require captain approval. Furthermore, budget codes and accounting codes can be optionally linked to purchase orders, enhancing financial tracking.

### \*NEW MODULE\* Standard Operating Procedures (APP & WEB):

A brand new module that enables users to access and view Standard Operating Procedures (SOPs) directly from their mobile devices. These SOPs can be designed and configured through the web interface, providing flexibility and easy access for users.

You can navigate to Standard Operating Procedures under the ISM menu item. SOPs are only editable in the web version of IDEA YACHT, but can be viewed in the APP.



### Crew and guest forms/reports updated to reflect current IMO FAL Forms:

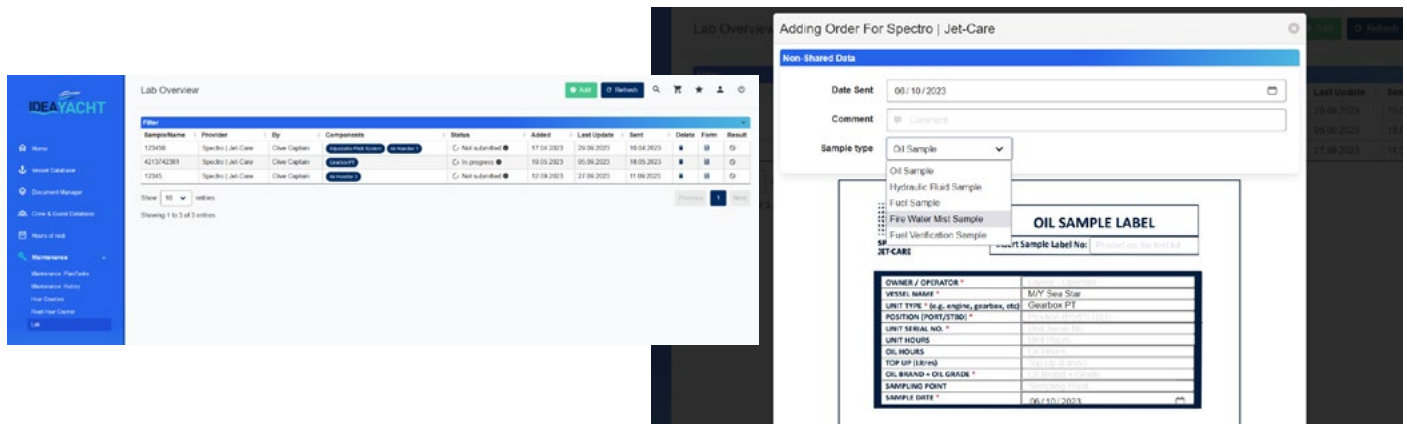
Forms and reports related to crew and guest information have been updated to align with the latest standards from the International Maritime Organization (IMO) for FAL Forms, ensuring compliance and accuracy.

## IDEA YACHT Release 2023.3

### Full Spectro|Jet-Care Sample Type Support:

IDEA YACHT Web now offers comprehensive support for a wide range of Spectro|JET-Care sample types, including oil samples, hydraulic samples, fire mist water samples, fuel samples, and fuel verification samples, enhancing your data collection capabilities.

You'll find our Spectro|Jet-Care integration under the 'Labs' section in the menu.



### \*NEW PRODUCT\* IDEA Direct Order

The introduction of IDEA Direct Order within our purchasing page offers several significant advantages. It streamlines the ordering process by enabling vessels to request order quotes directly from vendors, making procurement more efficient. This feature is accessible to vessels with subscription licenses (sp10, sp11, sp12, sp13, sp14), expanding its reach and usability.

IDEA Direct Order promotes collaboration with vendors as it initiates the creation of a Quote Request from the Purchase Order, allowing vendors to price items and propose offers. Your crew can easily accept vendor offers, seamlessly integrating new pricing information into their purchase orders. Additionally, the system facilitates order tracking, enabling crew members to monitor order progress via the provided shipping code. Effective communication is also fostered, with IDEA and third-party vendor users able to interact effortlessly through the comments tab within the Quote Request.

IDEA Direct Order enhances the procurement process, streamlines communication, and simplifies ordering, making it a valuable addition to our platform. If you are interested in a demo, whether a vessel or a vendor, then contact our experts on [sales@idea-data.com](mailto:sales@idea-data.com)

