

# ZeeBORN

## ZeeBORN Fleet Management

Copyright © 2022 ZeeBORN GmbH  
updated: 10/12/2022

## Table of Contents

<b>1</b>	<b>ZeeBORN Fleet Management Solution</b>	<b>1</b>
<b>2</b>	<b>What's new?</b>	<b>2</b>
<b>3</b>	<b>Installation</b>	<b>3</b>
3.1	Server Installation/Stand-Alone Installation .....	3
3.2	Client Installation .....	6
3.3	Test and Troubleshooting .....	7
3.4	Update Installation .....	8
<b>4</b>	<b>First Login</b>	<b>10</b>
<b>5</b>	<b>General</b>	<b>11</b>
5.1	Checking Correct Time and Time Zone Settings .....	11
5.2	How Tos general .....	11
	How to use Grids .....	11
	How to use "Select my ships" .....	19
5.3	General Commands .....	20
	Share .....	20
	Refresh .....	20
	Search .....	20
	Documents/Attachments .....	20
	Add .....	20
	Show/Delete .....	20
<b>6</b>	<b>Overview/Administration</b>	<b>21</b>
6.1	General Usage .....	21
6.2	Fleet Monitor .....	21
	Fleet Monitoring Service .....	21
	Time Table Overview .....	22
6.3	Site Manager .....	22
	Sites .....	22
	Creating a New Site .....	23
	Modifying Existing Sites .....	23
	Info .....	23
	Details .....	23
	Ship Certificates .....	23
	How to use inactive certificates .....	23
	Timetable .....	24

	Crew List.....	26
	Crew Certificates.....	26
	Budget.....	26
	Task Tracking.....	27
	Maintenance.....	27
	Assignments.....	27
	Insurance.....	27
	Audit.....	27
	Ranklist.....	27
	Critical Equipments.....	28
	Drills.....	28
<b>6.4</b>	<b>Other Modules/Administration .....</b>	<b>28</b>
	<b>Fleet Overview.....</b>	<b>28</b>
	<b>Getting Version Information.....</b>	<b>28</b>
	<b>Gadgets.....</b>	<b>29</b>
	Currency Converter.....	29
	Find Contact.....	29
	Get Newest Exchange Rates.....	29
<b>6.5</b>	<b>User Activities .....</b>	<b>29</b>
<b>7</b>	<b>Configuration/Administration .....</b>	<b>34</b>
<b>7.1</b>	<b>Global .....</b>	<b>34</b>
	Countries.....	34
	Nationalities.....	34
	Currencies and Exchange Rates.....	34
	Official Company Header.....	35
<b>7.2</b>	<b>E-Mail .....</b>	<b>35</b>
	Mail Template Categories.....	35
<b>7.3</b>	<b>Accounting .....</b>	<b>35</b>
	Cost Department/Category/Account.....	35
	Cost Center.....	35
	Cost Transfer Account.....	36
	Periods.....	36
	Earnings/Deductions.....	36
	Payment Conditions.....	36
	Assign Accounts.....	37
	Assign Limits.....	37
	Configure Invoice Registrar.....	37
<b>7.4</b>	<b>Department/Job Names .....</b>	<b>38</b>
	Departments Management.....	38
	Jobs and Ranks Management.....	39

<b>7.5</b>	<b>Traveling</b> .....	<b>39</b>
	Airports.....	39
	Ports.....	40
<b>7.6</b>	<b>Sites/Ships</b> .....	<b>40</b>
	Configuration general.....	40
	Ship Types.....	40
	Site Certificate Groups.....	41
	Certificates/Requirements.....	41
	Assign Certificates to Sites.....	42
	Assign SBM/Component Certificates to Sites.....	42
	Insurance Groups.....	42
	Insurances.....	42
	Insurance Case Categories.....	43
	Assign Insurances to Ship.....	43
	Time Table Status.....	43
	Activities.....	44
	Required Fields.....	44
	Dashbord Items.....	44
	Specified Use.....	45
<b>7.7</b>	<b>Contacts</b> .....	<b>45</b>
	Contact Categories.....	46
	Address Types.....	46
	Correspondence Languages.....	46
	Transportation Types.....	46
	Event Types.....	46
	Event Results.....	46
	Comment Types.....	47
	Activity Categories.....	47
	Rating Types.....	47
	Rating Intervals.....	47
	Rating Warning Level.....	47
<b>7.8</b>	<b>Crewing</b> .....	<b>47</b>
	Training Types.....	47
	Certificate Groups.....	47
	Certificates / Requirements.....	48
	Assign Certificates to Jobs.....	48
	Contract Templates.....	48
	Relationships NOK.....	48
	Assignment Status.....	49
	Accounting Keys.....	49
<b>7.9</b>	<b>Applicant Manager</b> .....	<b>49</b>
	Application Types.....	49
<b>7.10</b>	<b>Purchasing</b> .....	<b>49</b>

Units .....	49
Transportation Details .....	49
Additional Cost Types .....	49
Configuration (general) .....	50
<b>7.11 Task Tracking/Audits &amp; Inspections/Incidents .....</b>	<b>50</b>
Audit Configuration .....	50
Task Tracking Configuration .....	50
Audit Type Groups .....	51
Audit Types .....	51
Audit/Item Categories .....	52
Entities .....	53
Modules .....	53
Audit/Item Status .....	53
Audit/Item Standard .....	54
Audit/Item Groups .....	54
Audit/Item Number .....	54
Root Causes .....	54
Root Cause Categories .....	54
SIRE References .....	54
Accountability .....	55
Regions .....	55
Incident/Accident Types .....	55
Incident/Accident Locations .....	55
Incident/Accident or Audit Position .....	55
Incident/Accident Sea State .....	55
Incident/Accident Source of Lighting .....	56
Incident/Accident Wind Direction .....	56
Incident/Accident Wind Force .....	56
Incident/Accident Weather Type .....	56
Accident Types .....	56
Personal Accident .....	57
Incident Configuration (general) .....	57
Accident Injury (Personal) .....	57
SDR Defect Category .....	57
Configure Incident Report Types .....	57
<b>7.12 Risk Assessment .....</b>	<b>59</b>
Hazard Categories .....	59
Operation Types .....	59
Operation Groups .....	59
Operations .....	59
Risk Matrix .....	60
Risk Assessment Configuration .....	61
Critical Equipment Types .....	62

Further Action Types .....	62
<b>7.13 Dry Docking .....</b>	<b>62</b>
Services .....	63
Material .....	63
Enclosure .....	63
Survey by .....	63
General Configuration .....	63
Catalog Groups .....	63
Catalog (Jobcards) .....	64
Additional Costs .....	64
<b>7.14 Drill Plan .....</b>	<b>64</b>
Drills .....	64
Emergency Equipment .....	64
<b>7.15 System .....</b>	<b>64</b>
User Management .....	64
Using Roles .....	65
E-Mail Account Configuration .....	65
Login .....	66
Reports .....	66
Password Policy .....	67
Configure User Ships .....	72
<b>8 Office Manager .....</b>	<b>74</b>
<b>8.1 Configuration .....</b>	<b>74</b>
<b>8.2 Managing Contacts .....</b>	<b>75</b>
Addresses .....	75
E-Mail Addresses, Phone Number, Fax Numbers ... ..	75
Using Categories .....	75
<b>8.3 Managing Company Contacts And Related Contacts .....</b>	<b>75</b>
<b>8.4 Managing Assistants Contacts .....</b>	<b>76</b>
<b>8.5 Managing Documents .....</b>	<b>76</b>
<b>8.6 E-Mails: Sending, Management .....</b>	<b>77</b>
<b>9 Budgeting .....</b>	<b>78</b>
<b>9.1 Transactions .....</b>	<b>78</b>
<b>9.2 Overview .....</b>	<b>79</b>
Pivot Grid .....	79
<b>10 Purchasing .....</b>	<b>80</b>
<b>10.1 Overview Configuration .....</b>	<b>80</b>
<b>10.2 Requisitions .....</b>	<b>80</b>
Creating/Editing Requisitions .....	80

<b>Overview open Requisitions</b> .....	83
<b>Overview approved Requisitions</b> .....	85
<b>Overview closed Requisitions</b> .....	87
<b>Overview rejected Requisitions</b> .....	88
<b>10.3 Request for Quotation</b> .....	<b>90</b>
<b>Send RfQ again after receiving quotations from suppliers</b> .....	90
<b>Overview open RfQs</b> .....	90
Overview Quotations - open RfQs.....	92
<b>Overview RfQs with Supplier assigned</b> .....	92
Overview Quotations - RfQs with Supplier assigned.....	94
<b>Overview closed RfQs</b> .....	94
Overview Quotations - closed RfQs.....	95
<b>Overview rejected RfQs</b> .....	95
Overview Quotations - rejected RfQs.....	96
<b>10.4 Purchase Orders</b> .....	<b>97</b>
<b>Overview on hold Purchase Orders</b> .....	97
<b>Overview open Purchase Orders</b> .....	99
.Approving Purchase Orders.....	101
<b>Overview approved Purchase Orders</b> .....	101
.Send Document.....	103
<b>Overview closed Purchase Orders</b> .....	103
.Overview sent Purchase Orders.....	106
.Receive Items.....	113
<b>Overview rejected Purchase Orders</b> .....	114
<b>Switch Items</b> .....	116
<b>10.5 Overview Reports</b> .....	<b>116</b>
<b>10.6 Overview Actions</b> .....	<b>117</b>
.Search.....	119
.Stock Search.....	121
<b>10.7 Legend</b> .....	<b>121</b>
<b>10.8 Analysing Budget</b> .....	<b>121</b>
<b>10.9 Overview General</b> .....	<b>122</b>
<b>10.10 How Tos</b> .....	<b>122</b>
. <b>User Dashboard</b> .....	123
. <b>Show last supplier</b> .....	129
. <b>ProForma Invoices</b> .....	131
. <b>Follow Up Purchase Documents</b> .....	136
. <b>Rate Supplier</b> .....	140
.Bad Rating.....	167
. <b>Forward Orders</b> .....	167
. <b>Split POs - Booking Date</b> .....	169
. <b>Default Currency and Discount per Supplier</b> .....	173

<b>11</b>	<b>Planned Maintenance</b>	<b>176</b>
<b>11.1</b>	<b>Crewing</b>	<b>176</b>
	<b>. Configuration</b>	176
	. Pet Types and Requirements	176
	. Special Request Categories	176
	. Category	177
	. E-Mail Templates	177
	<b>. Managing Crew Members</b>	177
	. Certificates	177
	. Additional	177
	. Status	177
	. Bank Details	177
	. Assignments	177
	. Next Of Kin	177
	. Contracts	178
	. Training	178
	. Earnings and Deductions	178
	. Overtime	178
	. Performance Reports	178
	. Master Data	178
	. Special Request	178
	. Medical	178
	. Clothes and Equipment	178
	<b>. Managing Guests</b>	179
	. Pets	179
	. Special Requests	179
	<b>. Crew Planning</b>	179
	. On / Off Signer	179
	. Graphical Planning	179
	. Planning Generator	180
	. Configuration	180
	. Manage Planning Groups	180
	. Manage Required Working Days	181
	. Manage Job Names	181
	. Manage Transportation Details	181
	. Crew Changes	181
	<b>. Status Overview</b>	181
	. Budgeting	181
	<b>. Payroll</b>	181



<b>11.2 Machinery Components</b>	<b>181</b>
. Component Counters	182
. Updating Running Hour Counters	183
. Counter List	184
. Reset Counter	185
. Adjust Counter	185
. Create Maintenance Reports	186
. Create Service Orders	186
. Create Spare Part Orders	186
. Spare Parts	186
. Lists and Reports	187
. Register Component Certificates	187
. "Kozlowski Tools"	187
<b>11.3 Maintenance Jobs</b>	<b>189</b>
. Maintenance Job Schedules	189
. Reporting	190
. Reports	190
. Job Details Editor	191
<b>11.4 Stock Control</b>	<b>192</b>
<b>11.5 Change Requests</b>	<b>192</b>
<b>12 Stock Control</b>	<b>194</b>
<b>12.1 Differences Between Locations and Catalogs</b>	<b>194</b>
<b>12.2 Locations</b>	<b>194</b>
. Managing Locations	194
. Managing Stock Items	195
. Linking Stock Items To Catalog Items	195
. Stock Tracking/Inventory	196
. Importing from Excel	196
. Label Printing	197
<b>12.3 Catalogs</b>	<b>197</b>
. Managing Catalogs	197
. Managing Catalog Items	198
. Importing from Excel	198
<b>12.4 Creating Requisitions</b>	<b>198</b>
<b>13 Document Management</b>	<b>199</b>
<b>13.1 Managing The Library</b>	<b>199</b>
. Configuration	200
<b>13.2 Managing Documents</b>	<b>201</b>
. Creating Documents	201
. Assigning Documents To Sites	202

. Releasing Documents .....	202
. Updating, Distribution of Updates .....	203
. Documents History .....	203
. Batch Release .....	203
<b>13.3 Using Word as Editor .....</b>	<b>204</b>
<b>13.4 Document Editor .....</b>	<b>204</b>
<b>13.5 Reports .....</b>	<b>204</b>
. Documents To Be Released .....	204
. Expiring Documents .....	205
<b>14 Audit and Inspect .....</b>	<b>206</b>
<b>14.1 Overview Configuration .....</b>	<b>206</b>
<b>14.2 Add Inspection Report .....</b>	<b>207</b>
. Follow up Items .....	207
. Complete Inspection Item .....	208
. Status of items .....	208
. Add Inspection Items .....	208
<b>14.3 Handling in office .....</b>	<b>209</b>
<b>14.4 Planned audits .....</b>	<b>210</b>
<b>14.5 Useful functions .....</b>	<b>210</b>
<b>14.6 Reports .....</b>	<b>210</b>
<b>14.7 Add a planned inspection .....</b>	<b>211</b>
<b>14.8 Distribute and review inspection reports .....</b>	<b>211</b>
<b>14.9 VIQ Versioning (Follow up) .....</b>	<b>211</b>
<b>14.10 Import SIRE .....</b>	<b>212</b>
<b>14.11 Audit Reports .....</b>	<b>212</b>
<b>14.12 Audit Status Overview .....</b>	<b>213</b>
<b>15 Risk Assessment .....</b>	<b>215</b>
<b>15.1 Overview Configuration .....</b>	<b>215</b>
<b>15.2 General .....</b>	<b>216</b>
<b>16 Task Tracking .....</b>	<b>217</b>
<b>17 Master Contracts Management .....</b>	<b>218</b>
<b>17.1 Configuration .....</b>	<b>218</b>
<b>17.2 Collection of Contracts .....</b>	<b>218</b>
. New .....	218
. Commands .....	219
. Budget .....	219
<b>18 Invoice Registration .....</b>	<b>221</b>

<b>18.1</b>	<b>Overview Configuration</b>	<b>221</b>
<b>18.2</b>	<b>Registration</b>	<b>222</b>
<b>18.3</b>	<b>Handling</b>	<b>222</b>
<b>18.4</b>	<b>Show Invoices</b>	<b>223</b>
<b>19</b>	<b>Cashbook</b>	<b>224</b>
<b>20</b>	<b>Incident Reporting</b>	<b>225</b>
<b>20.1</b>	<b>Overview Configuration</b>	<b>225</b>
<b>20.2</b>	<b>Creation of a report</b>	<b>226</b>
<b>20.3</b>	<b>Handling in office</b>	<b>227</b>
<b>20.4</b>	<b>Follow-Up of ToDo-Items (ship)</b>	<b>227</b>
<b>20.5</b>	<b>Follow-Up of ToDo-Items (office)</b>	<b>227</b>
<b>20.6</b>	<b>Distribution of the reports</b>	<b>228</b>
<b>20.7</b>	<b>Useful functions</b>	<b>228</b>
<b>20.8</b>	<b>Reports</b>	<b>228</b>
<b>21</b>	<b>Drugs &amp; Alcohol</b>	<b>229</b>
<b>21.1</b>	<b>Overview Configuration</b>	<b>229</b>
<b>21.2</b>	<b>Request Test</b>	<b>229</b>
<b>21.3</b>	<b>Edit Test</b>	<b>229</b>
<b>21.4</b>	<b>Additional Test</b>	<b>230</b>
<b>21.5</b>	<b>External Test</b>	<b>230</b>
<b>21.6</b>	<b>General</b>	<b>230</b>
<b>22</b>	<b>Drill Plan</b>	<b>231</b>
<b>22.1</b>	<b>Overview</b>	<b>231</b>
<b>22.2</b>	<b>Planned Drills</b>	<b>231</b>
<b>22.3</b>	<b>Approve (on board)</b>	<b>232</b>
<b>22.4</b>	<b>Unplanned Drills</b>	<b>232</b>
<b>22.5</b>	<b>Reports</b>	<b>232</b>
<b>23</b>	<b>Tools</b>	<b>233</b>
<b>23.1</b>	<b>Shared Modules</b>	<b>233</b>
	MiniMail	233
	Database Replication	234
	Transferring changes to other sites	234
	Importing changes from other sites	235
	Missing Import Status	235
	Automatic Database Replication	236
	Report Designer	237

.General Data.....	237
.Variables.....	237
.Data.....	237
.Designing the Layout.....	238
.Testing a Report.....	238
<b>23.2 Cleanup .....</b>	<b>238</b>
<b>23.3 XRateUpd .....</b>	<b>238</b>
<b>24 Tutorials .....</b>	<b>240</b>
<b>24.1 Tutorials English .....</b>	<b>240</b>
.Drill Plan Standalone Version (eng).....	240
.Agency Requests .....	257
.Exchange Rate Updater.....	259
.ZeeBORN Tasks (eng).....	265
.How to change accounts.....	271
.VIQ Standards (eng).....	275
.Create on demand jobs.....	281
.Ship Defect Report.....	286
.Site & Component Certificates (eng).....	290
.Copying Ship Data.....	298
<b>24.2 Tutorials Deutsch .....</b>	<b>300</b>
.Agency Requests (deu).....	300
.Copy Ship Data (deu).....	302
.How to change accounts.....	303
.Create on demand jobs.....	308
.Exchange Rate Updater (deu).....	312
.ZeeBORN Tasks (deu).....	318
.VIQ Standards (deu).....	323
.Drill Plan Standalone Version (deu).....	331
<b>25 Knowledge Base .....</b>	<b>349</b>
<b>25.1 General Information .....</b>	<b>349</b>
.Version Numbers.....	349
.00-0001 - Setup doesn't allow to change program path and database path.....	350
.00-0002 - Error message "User limit reached" while starting a module or.....	350
.00-0003 - The "Reports" section of the Application Menu is always empty.....	351
.00-0004 - Some of the features described in the documentation are not.....	351
.00-0005 - I can't update exchange rates using the online update gadget.....	351
.00-0006 - Error while opening database table.....	352
.00-0007 - "Database dictionary not found" message during application startup.....	352
.00-0008 - Meaning of tracking information in detail views.....	353

.00-0009 - "No data in database ..."	354
.00-0010 - Serious error while connecting to database	354
.00-0011 - Couldn't delete file "..."	355
.00-0012 - ADS Error 6420	355
.00-0013 - Database Re-Indexing	356
.00-0014 - Error 7009	357
<b>25.2 Maintenance</b>	<b>357</b>
.02-0001 - Error message "No parent component with own counter found."	357
.02-0002 - Error message "Internal Error [FindComponentInTree] ..."	357
.02-0003 - Warning "The calculated average running time is greater than 24 h."	358
.02-0004 - Maintenance report requires attachment	358
<b>25.3 Data Replication</b>	<b>359</b>
.07-0001 - Not all sites are available for data replication	359
.07-0002 - Import shows warning about time gaps in transfer	359
<b>26 Glossary</b>	<b>360</b>
26.1 ART (average running time)	360
26.2 bcc	360
26.3 cc	360
26.4 Free Line Item	360
26.5 Kozlowski Tools	360
26.6 PO	362
26.7 RfQ	362
26.8 RQ	362
26.9 zbDoc	362
26.10 %ZeeBORNCClient%	363
26.11 %ZeeBORNDData%	363
26.12 %ZeeBORNShared%	364
26.13 .replic	364
26.14 MC	364
<b>27 ZeeBORN Helpdesk</b>	<b>365</b>
<b>28 Support</b>	<b>366</b>

---

# 1 ZeeBORN Fleet Management Solution

---

Welcome to the ZeeBORN Fleet Management Solution manual.

You can also find an online version of this documentation at <https://doc.zeeborn.net>. The online documentation contains additional information resources like tutorials and may also contain updated information not included in this version of the document.

This documentation contains necessary descriptions, instructions and background information for using the single modules of the system.

You may also find newest information about the modules with separate documents coming with the setup program. Usually this is shown as a "Read Me" text while installing the system - there might be also a printed copy of this document.

There might be additional manuals available, issued by your company, that provide more details about company specific work flows.

---


## 2 What's new?

---

An overview about changed and added features can be found in the ZeeBORN tracking system at <https://tracking.zeeborn.net/releasenotes>. There you will find a general overview but also an individual status report about features requested by your company.

---

see also

[Version Numbers](#)  349

## 3 Installation

In this section you find all information about the installation of the system

- in your company network
- on stand-alone machines (e.g. laptops)
- in side offices
- in remote sites (ships, agencies etc.)

In most cases it will be sufficient just to run the setup program, confirm the suggested settings and starting the install process.

The initial installation of the system will be done by our [support team](#) or at least with the guidance from our team. So you will need the explanations on the following pages usually for installing updates to the already installed system.

### Command Line Parameters

The installation program setup.exe supports the following command line parameters:

/auto	performs an automatic installation or update of the software if this is the first installation, default folders will be used
/nocleanup	usually the setup programm will delete the "install" folder before preparing the new setup for further client setups/updates with parameter /nocleanup, the deleting of the "install" folder will be skipped some customers use the install folder for providing additional tools or resources for the client stations that would be deleted without using the /nocleanup parameter

On the following pages you will find further details about each setup type.

### 3.1 Server Installation/Stand-Alone Installation

Server Installation means the installation of all software included in the package together with the basic setup of the database components. These database components can be used later on by other clients as the central access point to all your data.

A typical reason for doing a server installation is the setup on a server to be used as the central database.

Another scenario is the installation of the complete package (including the database) on a laptop if the applications installed on the laptop will be used also while not being connected



to the server via a LAN connection. In these cases you will also install the [Database Replication](#) <sup>234</sup> module for synchronizing your local copy of the data with the database in your head office.

The server installation will be also used for a stand-alone system - a system that will have the programs and the database on one machine without ever being connected to a central server. This could be for instance the case on a single ship where all the management tasks will be done directly on-board without having a head office ashore.

## Database Engine Installation

**Please make sure that the Database Engine is installed and running before installing the ZeeBORN software.**

The ZeeBORN system requires an installed and running instance of the Advantage Database Server version 11.x or newer. A license for the Advantage Database Server will usually be purchased together with the ZeeBORN software. If the Advantage Database Server has been purchased via ZeeBORN GmbH, you will receive a pre-configured setup that already includes all configuration settings required for a proper operation of the ZeeBORN system.

*If you purchase an Advantage Database Server from another supplier or you may already have a version running on your server, please request a separate support document that describes the manual installation and configuration of the database engine.*

If you use the pre-configured setup provided by ZeeBORN GmbH, just choose the proper version for your operating system. 64bit operating systems require the 64bit version of the Advantage Database Server and 32bit operating systems the 32bit version of the database server.

The pre-configured setup just needs to be started and a simple dialog will guide you through the very simple installation process. No special knowledge is required.

## ZeeBORN Software Installation

In the next step just run the setup.exe that contains the ZeeBORN software. This setup program will also guide you through the installation process with simple instructions. In most cases it should be sufficient to choose the default file locations for the installation.

## Preparing for Network Operation

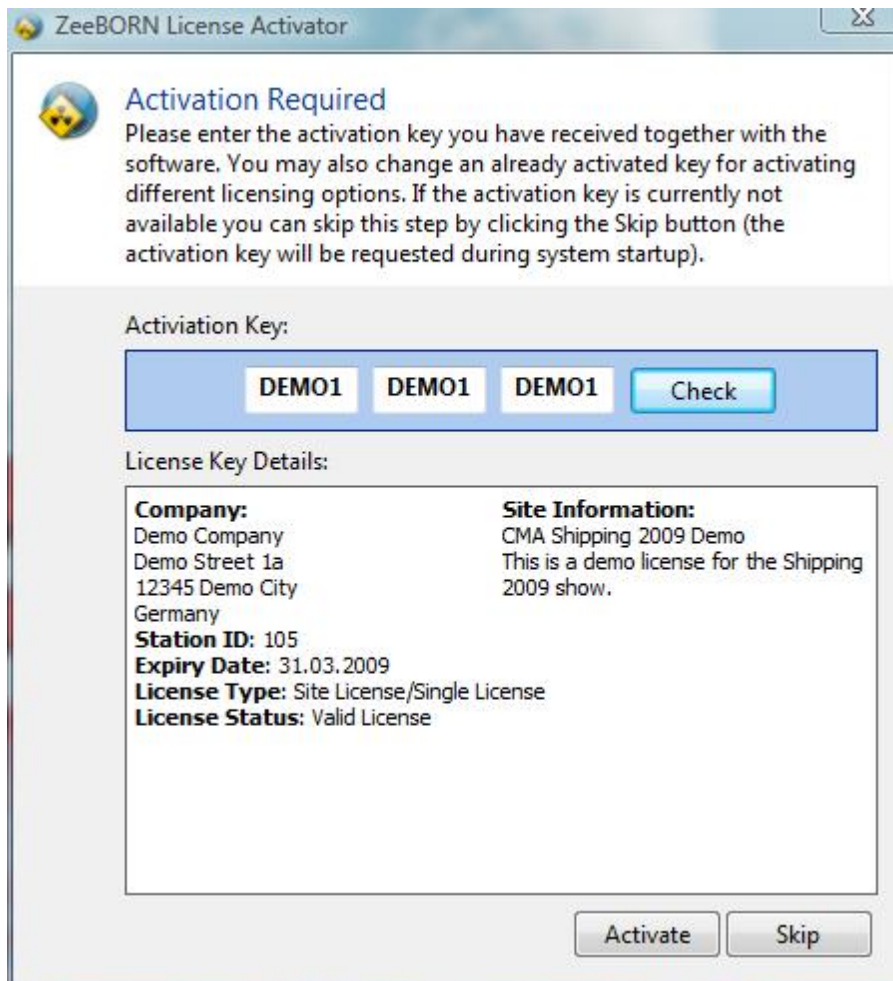
If you want to use the software in a network, please make sure that you share the data folder of the ZeeBORN software to the network and make it fully accessible to all network users. If you kept the default values during the setup, the data folder is C:\ZeeBORNDData. Use the standard Windows network sharing function for enabling the network access to this folder. The installation of the software on other client PCs is described in [Client Installation](#) <sup>6</sup>.

## Licensing

When you install the server part of the system you will be asked for an activation key. The activation key's main function is the proper configuration of the system. This includes custom settings like disabling/enabling certain features on customers demand, auto-configure the data replication module, layout features for document printing etc..

The activation keys will be handed out to you as a separate document. In this document you'll find all the offices, agencies and ships that belong to your company and that operate their own local copy of the company's database.

During the setup of the server part you will see the following window:



*Just enter the activation key and click the button **Check** for the activation key validation. If you have entered a valid activation key you will see the related license key details. Click on **Activate** if the activation key and the shown license key details are correct. You may also click the **Skip** button for performing the system activation at a later time. You will be able to continue the installation even without entering the activation key. Entering the activation is mandatory latest while starting the software for the first time.*

## Test and Troubleshooting

After a successful installation of the database server and the ZeeBORN software you will be able to start the ZeeBORN software via the icon on the Windows Desktop. After installing the system for the first time only the Administrator account with password "admin" will be available for log in. As the database usually doesn't contain any further data at this point, you'll only see a message informing you about the missing data in the system. If you reach this point, everything is properly installed and ready to use.

If you find any problems at this stage, please request assistance from our [support team](#)<sup>366</sup>.

## 3.2 Client Installation

**Please note:** the client installation requires Administrator access to the client PC

The client installation will be used on client PCs that are connected to a central database that has been prepared by using the [server installation](#)<sup>3</sup>.

In most cases you just need to start the setup program, confirm the suggested settings and let the setup install all the required components. The setup program for the client installation has been made available on the server during the server setup. The setup program (setup.exe) can usually be found at \\server\ZeeBORNDData\install (where server is the name of your server, and ZeeBORNDData the name of the network share name used for enabling the access to the database folder on the server).

This type of installation will only install components needed for using the database on the central server. A permanent network connection to this server is required for using the single modules of the system.

For laptops that will be used temporarily without being connected to the server you will need to run the server installation and you will also need to setup the [Database Replication](#)<sup>234</sup> module for synchronizing the offline copy of the database with the database in the head office.

### Automatic Client Installation

An automatic installation of the client software can be initiated by calling the setup program with adding the /AUTO parameter to the command line.

Some of our customers use this feature in the clients login script for installing the client software and also for checking for updates. Having this command in the login script will automatically check if the newest version is installed or will update an newer version after the server was updated.

### 3.3 Test and Troubleshooting

After a successful installation of the client software you will be able to start the ZeeBORN software via the icon on the Windows Desktop. After installing the system for the first time only the Administrator account with password "admin" will be available for log in. As the database usually doesn't contain any further data at this point, you'll only see a message informing you about the missing data in the system. If you reach this point, everything is properly installed and ready to use.

#### Solving database access error

There are several potential problems you might have to solve if the software isn't starting as expected.

1. **Firewall Settings:** Please make sure that the firewall on the server allows UDP communication through port 6262. Usually the required settings are automatically added while installing the Advantage Database Server. If you use another firewall solution than the one coming with Windows/Windows Server, you will need to open the port manually in your firewall. Alternatively you may also allow all network communication for the Advantage Database Server executable ads.exe. This can be found in C:\Program Files\Advantage v11.10\Server (depending on installed ADS version).
2. **Client software reports version "0.0.0.0" on the server:** This usually happens if the installation of the client software was executed under a different user account than the currently active user account. Please check if the Windows user currently logged in on the client PC has the necessary access rights for accessing the database on the server.
3. After changes in the firewall configuration you must restart the Advantage Database Server service to make the service aware of the firewall changes.
4. **"Error 5185 - Local server connections are restricted":** This error message may be shown in Terminal Server/Remote Desktop/Citrix environments if the Advantage Database Server isn't properly configured for being used in such environments. Please ask our [support team](#) for assistance.
5. **Other database access problems (e.g. error code 6420):** Below is a list of further things to be considered if you still get database access errors:
  - a. Make sure the SYSTEM account has access to all database folders. The SYSTEM account is used by the Advantage Database Server service for accessing the database.
  - b. Make sure all users have read/write access to the database folders.
  - c. Make sure all users have read/write access for the data network share.
  - d. Make sure the service "Advantage Database Server" is running on the server.
  - e. Please check on the server via the Event Viewer if there are any other problems reported that indicate a general network problem.
  - f. Make sure the database server can be reached via an IPv4 connection. IPv6 is still not supported.
  - g. Check the Windows Event Viewer on the client machine and on the server for any problems that might cause problems with the database connection (e.g. DNS problems, network problems)

#### Solving database performance problems

There are several aspects to be checked for ensuring a good performance of the database server.

1. Set the Power Options on the server to High Performance
2. Use the recommended Advantage Database Server settings as provided by ZeeBORN.
3. Do not use the compression option provided by Windows for the database folders.

## 3.4 Update Installation

All setup files (setup.exe) provided by ZeeBORN can be used for doing the initial installation of the software, but can also be used for updating an already installed version of the ZeeBORN software to the newest version available. It's not necessary to install all other updates released in between as the latest update made available will always be able to update any other version released before.

An update of the ZeeBORN software can be installed with the following procedure:

### Updating the Server

1. Make sure that all users in the network have closed the ZeeBORN software. This will be required if the update may introduce some changes in the database structure.
2. Create a backup of the server - or at least of the ZeeBORN database folder. Please use your normal backup procedure as the ZeeBORN system doesn't include a separate backup tool.
3. Install the update with setup.exe. The installation program will automatically perform a version check. It will prevent an accidental installation if a newer version is already installed.
4. Depending on the number of database structure changes included in the newest version and the amount of data available in the database, the update process can take up to 30 minutes.

### Updating the Clients

If the PC user has the necessary Windows rights for installing software:

1. Every time the ZeeBORN software will be started on a client computer, it automatically checks for available updates on the server.
2. If an update is found on the server, the user will be instructed to update the client software and will be guided to the folder where the update can be found.

If the PC user doesn't have the necessary Windows rights for software installation:

Please use the /AUTO command line parameter for running the setup.exe on the clients PC within your software distribution system.

### Advanced Client Update

During the server installation and update, the setup program creates a client image in folder %ZeeBORNDATA%\install\clientimage. This is an exact copy of the files to be copied to each client PC. Those files may be used for pulling the updated files from the server for instance while the user logs in. But you may also use the client image for pushing the updated client files to each connected PC.

A simple update script executed on a client PC may look like this:

```
xcopy "%ZeeBORNDATA%\install\clientimage\*.*" "%ZeeBORNCIENT%" /D /E /H /R /Y /K
```

Some notes:

1. The user who executes this updated script will need administrative Windows access rights for copying the client update files to the local PC.
2. The environment variables %ZeeBORNCIENT% and %ZeeBORNDATA% are defined per Windows user account and not as a global system variable. If you plan to execute the update script via an administrative account, you may need to replace the variables with the real file locations.

## 4 First Login

After finishing the installation and starting the system for the first time you will see a login screen when starting one of the systems modules. At the beginning there is only a pre-defined account for the Administrator. The Administrator account is the only account in the system that always has all access rights within the system.

The initial password for the Administrator is **admin**.

This password should be changed as soon as possible because this default password will be known very quickly by all users. Latest after reading this document.

*We strongly recommend that you also create and use your own personal user account even if this will not have all the access rights of an Administrator. One reason is: some parts of the system will log the user information while doing some tasks that require an identification who made what changes in the system (e.g. approving a document in the [Documents](#)<sup>[199]</sup> module or sending a Purchase Order in the [Purchasing](#)<sup>[80]</sup> module). Another reason is: some functions available to an Administrator might have an unwanted impact to your data. For instance: in most cases an information in the database will be flagged as archived while using a "Delete" function. The Delete functions available to an Administrator will really remove these data from the database. Of course the real deletion of data might be necessary sometimes - e.g. deleting test data, rubbish data or real outdated information. But we consider this type of deletion an administrative task. So whenever something administrative must be done in the system - use the Administrators user account. During normal operation of the system use your own user account.*

## 5 General

There are functions that are used in every module of our system. These functions are explained in this section.

### 5.1 Checking Correct Time and Time Zone Settings

The correct setting of the system's time and time zone is essential for the correct operation of the ZeeBORN System and especially the included [Data Replication](#) <sup>234</sup> module.

All data in the system will be stored in the database together with a timestamp identifying the time of creation or last modification. This timestamp will be used by the Data Replication module for synchronizing the data between two or more independent sites having their own local copy of the database. An incorrect setting of the time and time zone will lead to wrong or lost data.

Each time you login to the system you will see within the login dialog the current local time and UTC time. Please check especially the UTC time shown during login - this time is used for the data replication. If the shown UTC time isn't correct, please adjust the local time zone and time in the Windows **Control Panel** -> **Date and Time**. Please ask your system administrator before applying any changes to the date/time settings.

### 5.2 How Tos general

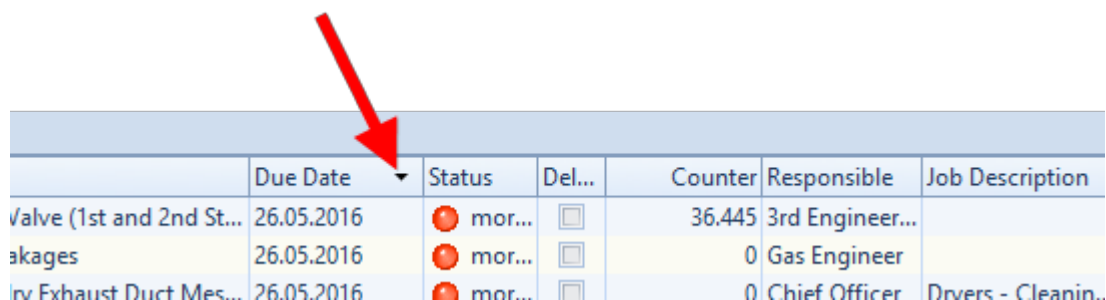
#### 5.2.1 How to use Grids

##### General

All grids in system will start with all data and a default layout. But there are a lot of ways to adapt a grid for your own needs.

##### Sort

To sort the grid by a specific column, you have to click on the column header.

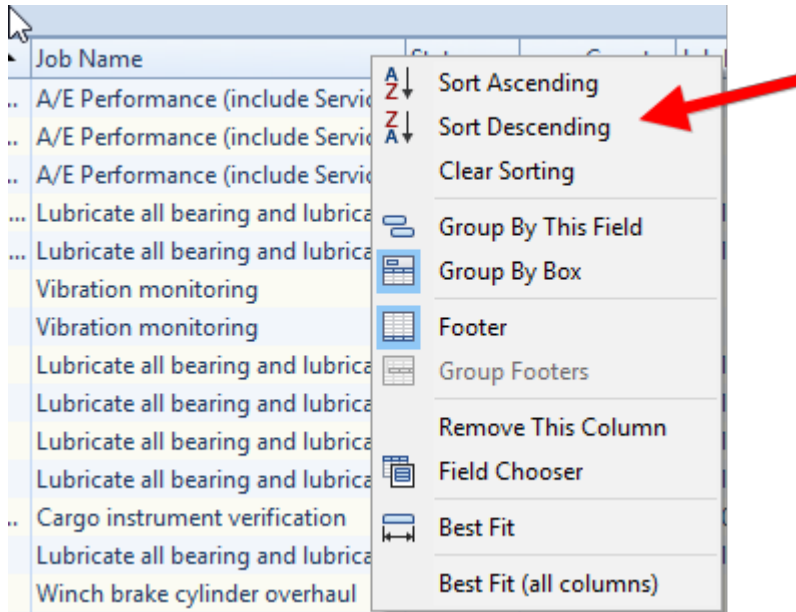


	Due Date	Status	Del...	Counter	Responsible	Job Description
Valve (1st and 2nd St...	26.05.2016	mor...	<input type="checkbox"/>	36.445	3rd Engineer...	
ackages	26.05.2016	mor...	<input type="checkbox"/>	0	Gas Engineer	
lv Exhaust Duct Mes...	26.05.2016	mor...	<input type="checkbox"/>	0	Chief Officer	Drivers - Cleanin..

The appearing triangle shows the sort direction. With another click on column header you can change sort direction.

Another possibility is the right click on the column header. if available the following menu will appear.





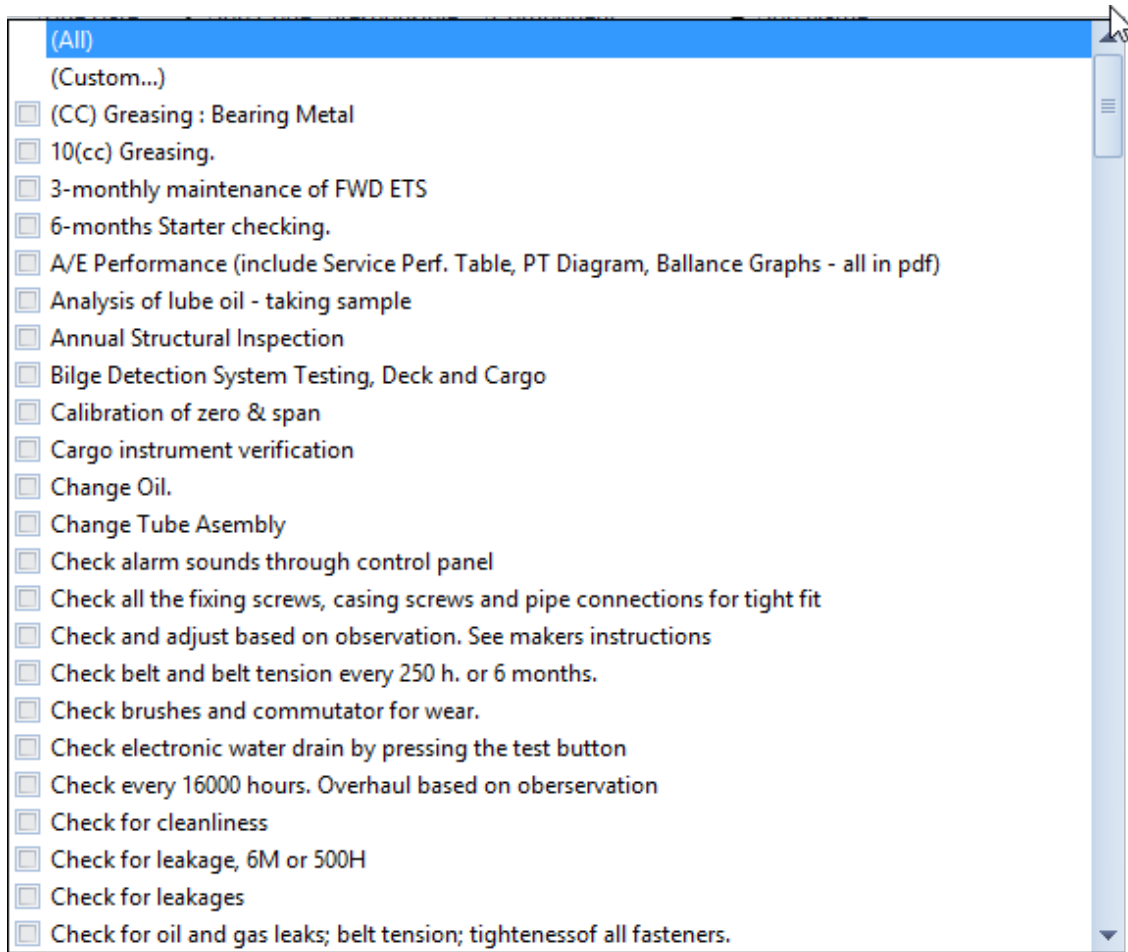
Click the appropriate button.

### Filter

To filter data you have to move mouse over upper right corner of the specific column. A filter symbol will appear.

onent	Job Name	Statu
Compressor No.2 ...	Take the lubricating oil for analy...	🟡

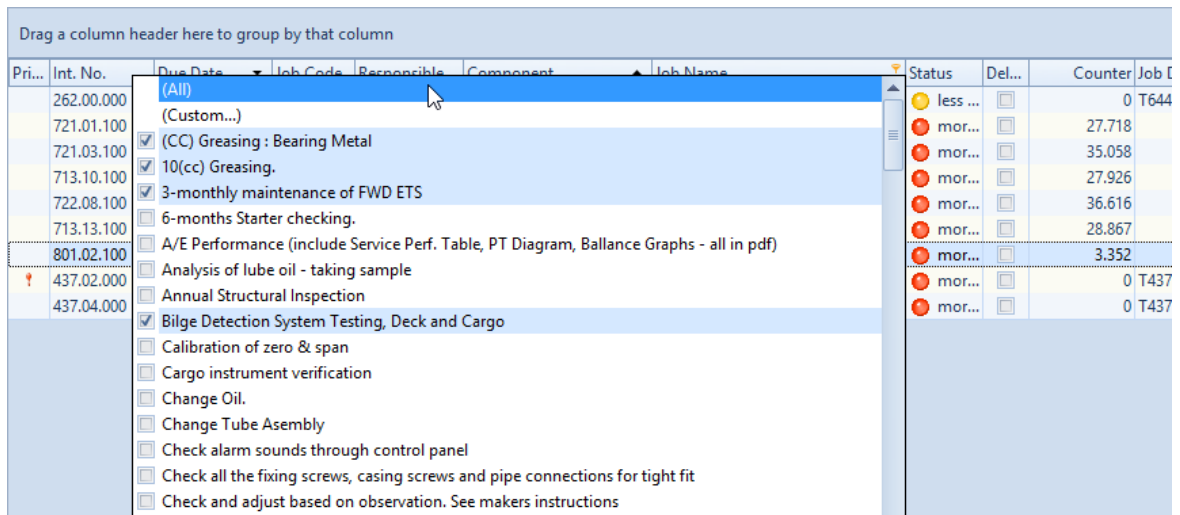
With click on the symbol the following selection will appear:



- (All) - all values will be shown
- (custom) - a custom selection will be shown as described in "[by custom filtering](#)"<sup>14</sup>)
- all available values for selected column with check box ("[by selection](#)"<sup>13</sup>)

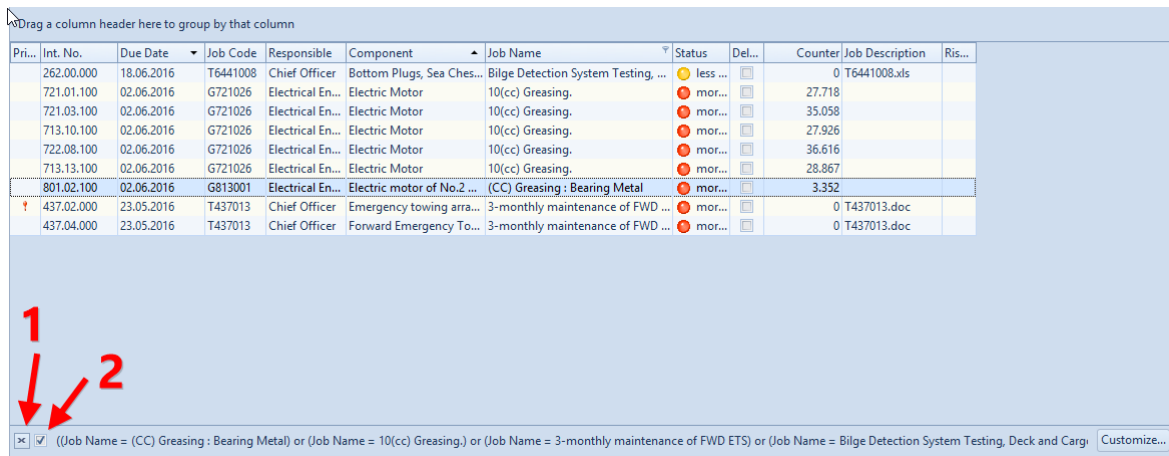
#### by selection

To filter grid on the desired values simply select the appropriate check boxes.



The grid will be updated immediately.

In the bottom of the table you can see the current filter settings.



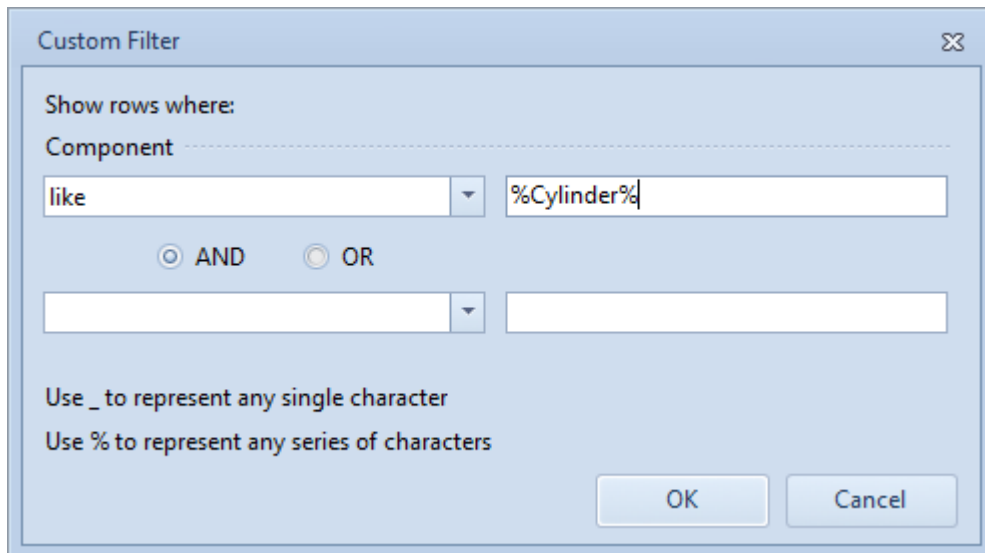
**(1)** With click on the x all previously filter settings will be deleted.

**(2)** With click on the check boy you stop the filtering process and all data will appear in the grid, but the filter settings will still remain. With next click on check box the filter will be set again with the previously assigned filter settings.

**by custom filtering**

A more extensive filtering can be performed by custom filtering.

If you would like to display for example all components that contain "Cylinder" you could either use filtering by selection as described above or you can use custom filtering.



Custom Filter

Show rows where:

Component

like

%Cylinder%

AND  OR

Use \_ to represent any single character

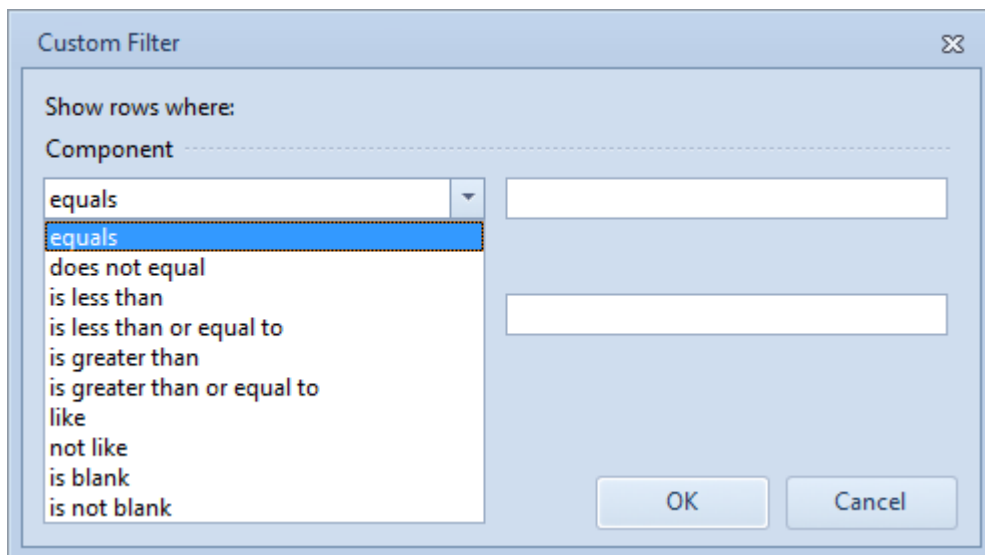
Use % to represent any series of characters

OK Cancel

In this case all components will be shown that contain somewhere "Cylinder".  
Please note: % and \_ are so called wildcards representing one ( \_ ) ore more (%) characters.

%Cylinder shows all components that end with Cylinder: Cylinder, 1st Cylinder e.g.  
Cylinder% shows all components that start with Cylinder: Cylinder, Cylinder Head e.g.  
%Cylinder% shows all components that start or end with Cylinder or have Cylinder  
somewhere in the middle.

There are some more options , but it would take too long here to explain all.



Custom Filter

Show rows where:

Component

equals

equals

does not equal

is less than

is less than or equal to

is greater than

is greater than or equal to

like

not like

is blank

is not blank

OK Cancel

## Group

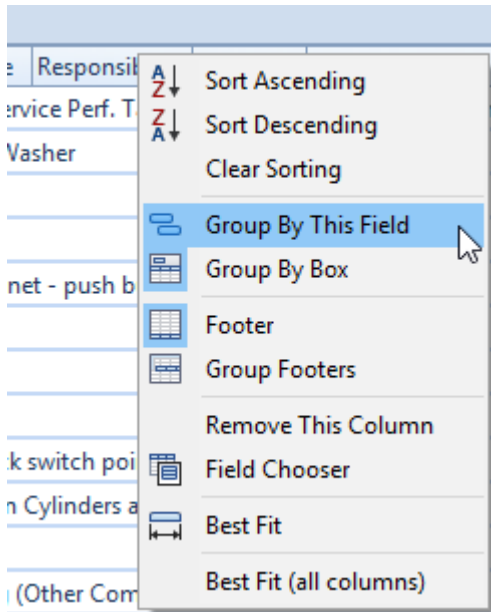
To group by specific column you have to pick the column header with left mouse and move the column in the "Drag a column header here to group by that column" area.

Component				
Pri...	Int. No.	Job Code	Job Name	Due Date
Component : Cylinder No.7 Fuel Injection Valve				
	654.05.270	B600184	Remove injection valves, check ...	04.02.2016
Component : Deck stand roller				
Component : Discharge Pump 1				

You can group this selection by another group by repeating the first step.

Component										
Job Code										
Priority	Int. No.	Due Date	Responsible	Job Name	Status	Del...	Counter	Job Description	Ris...	
Component : Electomotor										
Component : Electric Motor										
Job Code : B731002										
	366.01.510	14.07.2027	Electrical En...	Renew El. Motor. Bearings.	OK	<input checked="" type="checkbox"/>	4.247			
	366.01.110	13.07.2027	Electrical En...	Renew El. Motor. Bearings.	OK	<input checked="" type="checkbox"/>	5.512			
	366.01.610	09.04.2024	Electrical En...	Renew El. Motor. Bearings.	OK	<input checked="" type="checkbox"/>	5.085			
	366.01.410	09.04.2024	Electrical En...	Renew El. Motor. Bearings.	OK	<input checked="" type="checkbox"/>	5.393			
	366.01.310	30.09.2016	Electrical En...	Renew El. Motor. Bearings.	OK	<input checked="" type="checkbox"/>	0			
Job Code : G721026										
	721.01.100	02.06.2016	Electrical En...	10(cc) Greasing.	mor...	<input type="checkbox"/>	27.718			
	721.03.100	02.06.2016	Electrical En...	10(cc) Greasing.	mor...	<input type="checkbox"/>	35.058			
	713.10.100	02.06.2016	Electrical En...	10(cc) Greasing.	mor...	<input type="checkbox"/>	27.926			
	722.08.100	02.06.2016	Electrical En...	10(cc) Greasing.	mor...	<input type="checkbox"/>	36.616			
	713.13.100	02.06.2016	Electrical En...	10(cc) Greasing.	mor...	<input type="checkbox"/>	28.867			
Job Code : G731002										

Another possibility is the right click on the column header. if available the following menu will appear.



Hit button "Group by this field".

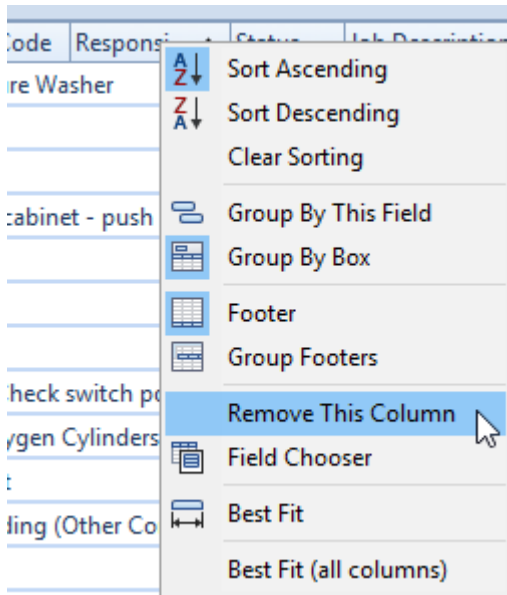
### Rearrange

If the column sequence isn't in a suitable order you can easily rearrange order by picking the column header with left mouse and moving it to the correct position.

To hide a column drag selected column in the right lower area of the grid.

onent	Job Name	Status	Counter	Job Description	Risk Ass...
Log	Monthly Report	mor...	0		
tory of Zero and ...	Monthly Report	mor...	0		
matic Shut-Off D...	Maintenance/checks	mor...	0	Damper Mainte...	
4600 manual oper...	Check tightness of inspection co...	less ...	0		
o.1 Performance ...	A/E Performance (include Servic...	mor...	0		
o.2 Performance ...	A/E Performance (include Servic...	mor...	0		
o.3 Performance ...	A/E Performance (include Servic...	mor...	0		
o.4 Performance ...	A/E Performance (include Servic...	mor...	0		
o.5 Performance ...	A/E Performance (include Servic...	mor...	0		
nmodation Ladde...	Lubricate all bearing and lubricat...	mor...	0	L431020.xls	
nmodation Ladde...	Lubricate all bearing and lubricat...	mor...	0	L431020.xls	

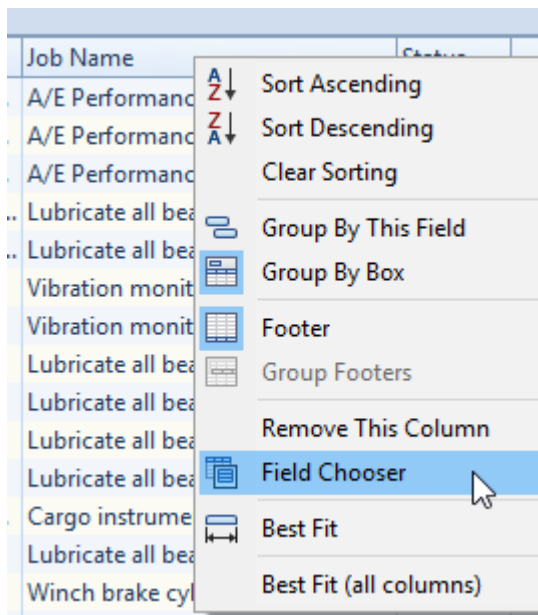
Another possibility is the right click on the column header. if available the following menu will appear.



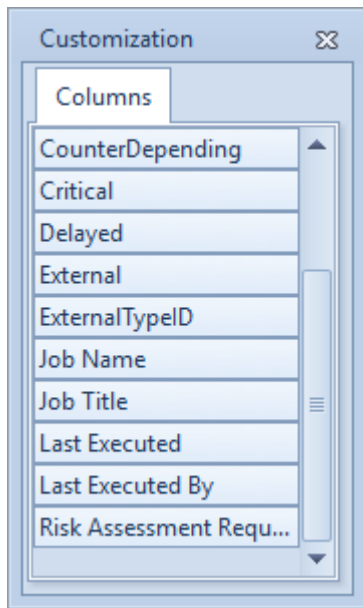
Hit button "Remove This Column"

### Field Chooser

If available you can use the field chooser. To access the field chooser hit right mouse on a column header.



Via the field chooser you have access to hidden or additional columns.



Drag selected column in the grid.

### Share

You can use the "share" Button either to save the grid to file (xlsx, xls, html, xml) or send it to printer.

### Grid Layout

#### Save

You can save the layout adjustments by using button "Grid Layout" -> "Save". Hit "New" and enter a meaningful name.

User name and creation date of layout will be stored in the database.

#### Load

You can load your own layout by using button "Grid Layout" -> "Load". Select the desired layout from the list and grid layout will be updated. The selected layout remains until the end of the session or until a new layout is loaded.

## 5.2.2 How to use "Select my ships"

For an easier work with our system, we have the function "Select my Ships". With one click all preferred ships are selected.

### Configuration

Hit either button "Admin Tools/Configuration" in the overview or "Configuration" in the other modules in the office.

In the configuration tree you'll find the configuration in part "System".



Hit button "Edit" to choose your needed ships. With save all changes will be taken over. Hit "cancel" and all changes will be ignored.

### **Use "Select my Ships" in the modules**

Hit button "Select my Ships" to preselect your preferred ships.

## **5.3 General Commands**

### **5.3.1 Share**

The Share Button is nearly overall available in the system and gives you the possibility to export the data regarding the appropriate data format.  
hot key "CTRL + P"

### **5.3.2 Refresh**

Das Modul bzw. die Ansicht können aktualisiert werden.  
Keyboard function key "F5"

### **5.3.3 Search**

Es kann nach Wörtern oder Satzteilen in einem Modul gesucht werden.  
Keyboard function key "F3"

### **5.3.4 Documents/Attachments**

#### **5.3.4.1 Add**

You can add documents/files

- from scanner
- from file
- from file with deleting (original file will be deleted from disk and will be available only in ZeeBORN System)
- multiple files
- multiple files with deleting
- link to ZeeBORN Documents (if available for this module)

#### **5.3.4.2 Show/Delete**

Shows all assigned documents.

If you have the corresponding user right you can delete document(s).

## 6 Overview/Administration

---

This is the normal starting point of the application. Here you have access to all other main modules of the system (depending on the purchased license options and depending on the assigned user access rights).

### 6.1 General Usage

In the left part of the screen you see the list of **Main Modules**. Just choose the section you are interested in and you will see in the **Modules** part of the screen the available programs and documents.

Starting a module is done by double-clicking its icon. The same is true for the online help and documents shown in the Modules part of the screen.

There is also a **Gadgets** section in the **Main Modules** list. This section gives you access to mini applications installed on your computer.

The **Reports** section provides access to favorite reports made available via the ZeeBORN Fleet Management.

Initially the Menu shows only the modules available to every user working on the current PC. You can use the button **Login for more modules** to see the modules that have been enabled for you.

### 6.2 Fleet Monitor

The Fleet Monitor shows the current status of all ships in your fleet. The actual updating of the status information will be done by the [Fleet Monitoring Service](#)<sup>21</sup>. The area itself just shows the results of the analysis.

#### 6.2.1 Fleet Monitoring Service

The Fleet Monitor requires a permanent analysis of all existing data in the Fleet Management database for providing the status information to the user.

Due to the huge amount of data to be analysed during the creation of the status information, this updating of the status will be done in the background in a pre-defined interval (by default every hour).

#### Possible Problems

If this Fleet Monitoring Service is not running, the status information for the fleet will not be updated and the Fleet Monitor gadget will show outdated values. If this is the case you will see a warning message in the Fleet Monitor gadget ("Warning: The Fleet Monitoring Service is not running on the database server. All shown values are outdated.").

#### Solutions

Click the **Request Update** button for forcing a status update by the Fleet Monitoring Service. After a few minutes you can re-open the Fleet Monitor Gadget and you will see the updated status information.

Please find an overview about all available check items here: [Dashboard Items](#)<sup>[44]</sup>

## 6.2.2 Time Table Overview

There is the option to display a time table overview for all ships or an individual ship. For this purpose, you have to select the required ship for monitoring the time table of this selected ship.

Select "[Configuration -> Site/Ships -> Specified Use](#)<sup>[45]</sup>" and assign "Time table overview"

The overview shows all existing Time Table entries. Therefore, the status of entries has to be assigned in the configuration before (see [Configuration -> Time Table Status](#)<sup>[43]</sup>) as well as the end date has to be assigned within a specified period (today + Preview Days).

### Preview Days

The user's own, self-selected Preview Days will be managed and displayed in the Time Table Overview.

Use Fleet Status -> Configuration.

Choose TAB „Time Table“ to get an overview of the current time table status.

In a similar form, this overview may be presented on a large-screen TV. This function gives all employees the opportunity to get an overview about the time table of all ships of the fleet and the status of all activities on board.

## 6.3 Site Manager

Beside the applications and modules itself the Overview screen provides also access to status information of all ships in your fleet(s).

In addition to the main Info screen with the general status overview for a selected ship you have also easy access to more details either by clicking the **Show Details** button in the ships status report or by clicking on one of the available tabs.

### 6.3.1 Sites

The Sites Overview screen gives you access to all details of all ships and sites in your system. Via the Info tab you get an immediate overview of the current site status. If this status overview shows warnings or problems you can switch directly to the related module in the system.

### 6.3.1.1 Creating a New Site

In the main menu of the Site Management click the button **New**. This button allows you to create a new entry for an office, an agency or a ship. Depending on your selection the program will request all the required data from you for creating the database record.

### 6.3.1.2 Modifying Existing Sites

- For modifying an existing site record you can choose a site from the site tree view.
- After selecting the site you will see the details of this site in the right part of the management screen.
- After clicking the **Edit** button you can change all entries of the selected site. For finishing the modification you will have to click the button **Save** for saving the changes to the database or click the button **Cancel** if you don't want to save the changes to the database.

### 6.3.1.3 Info

The Info screen gives you a per ship status view for all main areas of the ship. Areas that require your attention will be highlighted in red. Click the button **Show Details** for further details. In some cases the program will simply switch to another view with more details or the relevant module might be called up to allow a top down analysis of the shown problems.

Please find an overview about all available check items here: [Dashboard Items](#)<sup>44</sup>

*Please note: Due to the huge amount of data to be analysed, the Info screen will be update every 10 minutes only.*

### 6.3.1.4 Details

The Details screen shows all known details of the selected ship. If you have the necessary access rights you will also see a toolbar that allows you the modification of the shown data. For more details about modifying the ship details please see the chapter [Office Manager](#)<sup>74</sup>.

### 6.3.1.5 Ship Certificates

The Site Certificates screen shows you all known certificates and other similar documents that are important for the selected ship. You will also see an overview of already expired documents or documents that will expire soon.

#### *How to use inactive certificates*

#### **Set as inactive / Exclude certificate from Certificates Check**

To set certificate as "exclude from certificates check/inactive" hit checkbox in certificates edit form. Certificates with this checkmark will not be part of certificates check.

#### **Certificates Overview**

Certificates checked as "inactive" will be shown in Overview with black status balls and the certificate name in italic font style.

#### **Certificates Details**

In certificates details tree Certificates checked as “inactive” will be shown in italic font





### Report

A report shows for all / selected ship(s) certificates marked as “inactive”. Hit Button “Include Certificate in Check” for quick reactivation of selected certificate

#### 6.3.1.6 Timetable

The Timetable screen shows you the timetable of the selected ship. If you have the necessary access rights you will also see a toolbar with functions allowing you to modify and extend the shown timetable.

### Configuration

Function	Description
<a href="#">Ports &amp; Agents</a> 	Manage Ports and assign agents to ports (agents will be managed in <a href="#">contacts manager</a>  )
<a href="#">Time Table Status</a> 	Manage Time Table Stati.
Time Table Report Types	Manage Time Table Report Types (Noon Report, Arrival Report e.g.)
<a href="#">Port Activities</a> 	Manage Port Activities

#### Set Preview Days

The Time Table allows you to decide how many days in advance do you like to see.

Use „Configuration” -> choose “Set Preview Days” and make your entry.

The value is set to zero by default. It means only the actual day will be displayed.

#### Set Time Precision

This function displays time value which can be shown in:

- minutes
- hours

### Record of individual positions/Port Stays

Hit „New” -> a new Position Entry will be generated in the time table.

If a Time Table Entry already exists for a ship, some data will be taken over from the last existed time table entry. These are the following data:

- (1) the last port

(2) the last end date will be set as new start date

Depending on the selection of the status the form will be changed.

Is the status a „One Port“ status (see [Configuration – Time Table Status](#)<sup>[43]</sup>), the areas „Start“ and „End“ will be replaced by an individual area „Port“.

The area „Crew Change“ will be displayed only if the status has been assigned before (see [Configuration – Time Table Status](#)<sup>[43]</sup>) and a crew change will be allowed.

Once a Port containing a default Agent is selected, you can choose the item by default.

There is the option to change the selection you made.

If the configuration of the status does not manage the berthing time so it is only necessary to record the Start and End date.

### Assign Port Activities

To assign Activities to a Time Table Entry, please select the entry in the overview and hit button „Activities -> Assign“.

Choose „[Activity](#)“<sup>[44]</sup> and if necessary you can add „Remark(s)“.

All allocated Activities are displayed in the time table entry overview including all remarks.

Hit button „Activities -> Manage/Show“ to edit/delete allocated Activities.

### To be confirmed

It is not clear whether the date of the Time Table Entry or the Port is confirmed, so the entry can be set as „to be confirmed“.

If the check box is activated, so the entry is displayed in italics and gray in the overview. The message

„To be confirmed“ written in red appears in the HTML-view.

To confirm an entry you have to delete the check box by clicking „Edit“ or hit the button „Confirm“ (the latter is only possible after finalization of user's entry).

### Edit of an already-registered entry

If you want to edit an entry, first the system checks all existing entries which are prior to or after them.

The system will automatically customize all entries after confirmation.

### Additional Buttons – Overview

#### Time Frame

Hit „Load“ to get the listed Time Table Data for the certain period. The system calculates the end date from [Set Preview Days](#).<sup>[24]</sup>

#### Show All

Hit button „Show All“ to display all available Time Table entries for the required ship.

#### Without Missing

By clicking the button „Without Missing“, only the existing entries are displayed and otherwise the missing entries will be displayed too:

#### Show History

History of detailed entries will be displayed here.

#### **Confirm and Undo Confirmation**

Once an entry has been marked with „to be confirmed“. The process can be confirmed and will be completed.

#### **Generate Position Entries**

The system generates an intermediate Time Table Entry for two existing entries. Therefore use the button „Generate Position Entries“. Select the desired entries in the following form, choose the status of the generating entry and hit button „Generate and Close“.

#### **Dashboard and Fleet Monitor**

To check the available Time Tables, please select the required items as follows:

Configuration -> Sites/Ships -> [Dashboard Items](#)<sup>[44]</sup>

There are two verification routines:

- Time Table: check, if time table is available and completed.
- Time Table (confirmed): check, if all entries till today are confirmed.

The result of the check will be displayed either for the ship -> [Tab Info](#)<sup>[23]</sup> or will be displayed under the [Tab „Fleet Status“](#)<sup>[21]</sup>.

#### **6.3.1.7 Crew List**

The Crew List screen shows the current crew list of a selected ships. The relevant crew assignments can be modified in the [Crewing](#)<sup>[176]</sup> module.

#### **6.3.1.8 Crew Certificates**

The Crew Certificates shows all crew certificates that are about to expire soon and certificates that are already expired. Further details can be found in the [Crewing](#)<sup>[176]</sup> module.

#### **6.3.1.9 Budget**

The Budget screen shows you all budgeting accounts that have exceeded their limits. A further analysis of the relevant transaction data can be done in the [Budgeting](#)<sup>[78]</sup> module.

### 6.3.1.10 Task Tracking

The Task Tracking screen shows all tasks having a due date set and that have not been reported as completed yet. For modifications of the shown tasks please call up the [Task Tracking](#) <sup>[217]</sup> module.

### 6.3.1.11 Maintenance

The Maintenance screen shows you all overdue maintenance jobs for the selected ship. Further details can be seen by calling up the [Planned Maintenance](#) <sup>[176]</sup> module.

### 6.3.1.12 Assignments

The Assignments screen shows you all positions on board that do not have a related crew assignment in the Crewing module. The list shows the number of crew per given rank. Please use the [Crewing](#) <sup>[176]</sup> module to assign crew to the vacant positions on board.

### 6.3.1.13 Insurance

The Insurance screen shows you the status of all known insurances of the selected ship.

### 6.3.1.14 Audit

The audits screen shows all inspections which are overdue (due date / review dates)

### 6.3.1.15 Ranklist

In the Rank Management module you can define on a per ship base the number and type of required rank. The definition is done by selecting a single ship and assigning the required crew with a mouse click the the ships rank list.

#### Creating

A new rank list is defined by selecting a ship from the **Ship** combo box. After selecting the ship you can use the button **Assign** and **Remove** for assigning ranks from the list **Available Departments and Ranks** to the ship and for removing ranks from the rank list that are no longer required.

In the **Details** area of the list **Departments and Ranks** you can define the number of persons required for the selected rank (e.g. enter 8 if you need 8 times the rank Steward on board).

#### Copy rank list to other ship

A rank list can be copied to another ship by clicking the button **Copy to other ship** in the main screen of the Rank List module.

After clicking this button you will be asked for the ship to be used as a destination of the rank list to be copied. After clicking the button OK all data from the current ships rank list will be copied to the selected ship. Already existing data at the destination ship will be overwritten.



### 6.3.1.16 Critical Equipments

The critical equipments screen shows all parts - assigned to critical components - where available quantity is less than required minimum quantity.

### 6.3.1.17 Drills

The drills screen shows all planned overdue drills.

## 6.4 Other Modules/Administration

The Other Modules/Administration screen gives you access to further modules that are not integrated into the ZeeBORN System.

Here you can find

- **Programs:** a list of further programs that might be relevant to a selected part of our customers
- **Gadgets:** gadgets are usually little tools that provide customized features that are not part of the system; a gadget could be also a shortcut to a feature within a system providing quick access to a feature without the need of many mouse clicks. Please read also chapter [Gadgets](#)<sup>[29]</sup>.
- **Reports:** beside the included reports that are available directly in the single modules you can find here additional reports that are a) customized or b) to be made available without the need of starting the relevant module
- **Manuals:** beside the standard manual for the ZeeBORN System you might find here further manuals that might be important for the proper operation of the system.
- **Administration:** in the section you have access to typical administrative functions like database replication, license management and customized data conversion tools
- **Inhouse Tools:** this section is visible only when inhouse tools exist on the system. An inhouse tool is typically an application that will be provided by <%COMPOSHORT%> without further guaranties. So normally this button is usually not visible.

### 6.4.1 Fleet Overview

The Fleet Overview gadget is a monitoring tool for smaller companies having only a few ships to monitor. Companies with more than 5 ships will have the [Fleet Monitor](#)<sup>[21]</sup> gadget instead and also the ZeeBORN Fleet Menu on the Desktop as a replacement for the normal [ZeeBORN Application Menu](#)<sup>[21]</sup>

### 6.4.2 Getting Version Information

Most modules made available via the ZeeBORN Fleet Management provide additional information like [version number](#)<sup>[349]</sup> and the file date. This allows a checking if the newest modules are already installed on your computer.

Version information can be seen in the lower part of the Modules area after selecting an modules icon. You can also change to a list view by clicking the Show as List button. This will change the modules view to a list showing the modules plus additional version information.

### 6.4.3 Gadgets

The ZeeBORN Gadgets collection provides easy and fast access to selected features also found in the ZeeBORN modules.

#### 6.4.3.1 Currency Converter

The Currency Converter is a simple gadget for converting currency values. The conversion is done based on the currently known exchange rates and will be provided only for currencies that have been defined as "Active" (see [Administrator | Currencies and Exchange Rates](#)<sup>34</sup> for more details).

For each conversion the Currency Converter shows the status information when the exchange rate was updated. You may want to update the exchange rates first before using the converter - this can be done by using the [Get Newest Exchange Rates](#)<sup>29</sup> gadget.

#### 6.4.3.2 Find Contact

The Find Contact gadget provides easy and fast access to contact information.

#### 6.4.3.3 Get Newest Exchange Rates

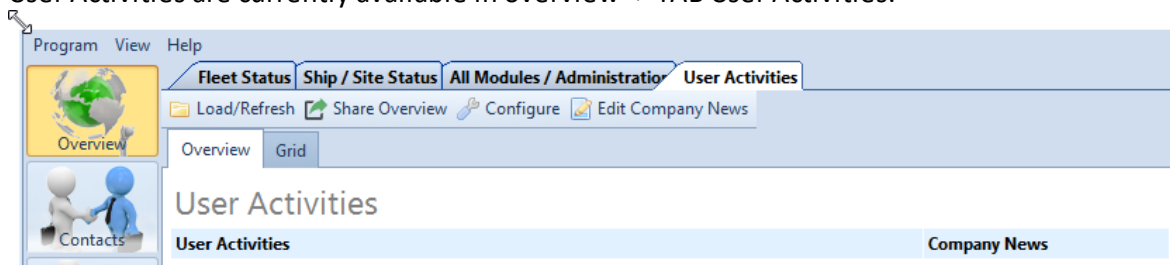
This gadget tries to update the exchange rates for all currencies in the database that have been set to "Active" by retrieving the newest updates from the online service CurrencySource.com. Please note that CurrencySource.com provides the exchange rates only for some selected currencies.

Please see also the Knowledge Base article "[00-0005 - I can't update exchange rates using the online update gadget](#)"<sup>351</sup>.

## 6.5 User Activities

The ZeeBORN User Activity side gives a personalized overview of actual projects and shows information and changes to be noted.

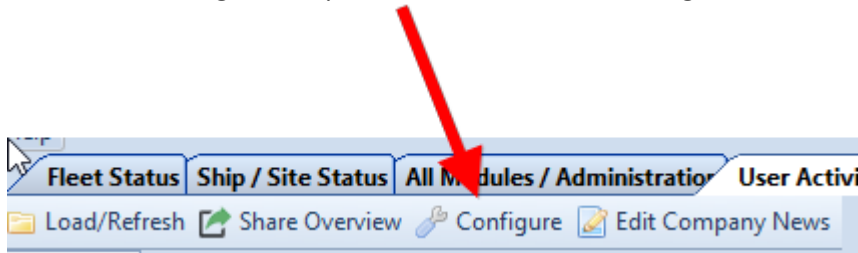
User Activities are currently available in overview -> TAB User Activities.



### Configuration

Each registered user has the opportunity to configure „User Activities“, only if he has the respectively rights, where he is responsible for. By take over from work or ships is it easy to change the configuration.

To start the configuration process hit the button „Configure“:



## General

Depending on the authorization you will find different TABs in the configuration field.

All settings where vessels have to be allocated, please note the following points:

First you have to select the checkbox on the right side for preparation the ships with the

checkbox on the left side. If checkbox is not selected, so the settings for vessels are blocked.

## Audits

### Unread Audits

If the company uses the following function „Select Audits as read“ there is the possibility to display the „unread Audits“ for selected vessels.

Activate the option by click on checkbox „Unread Audits / Office only“ and select your required and individual vessel shown in the grid on the right side.

By using the right mouse button you can choose the mentioned options: „Select all“, „Select none“ and „Invert selection“.

## Drills

These setting are only available in the office version.

### Overdue Drills

In Overdue Drills you can select on which vessel(s) the review should be done. All drills will be displayed which in the module Drill Plan are available in the folder „Previous“.

### Unapproved Drills

All drills that shown in folder „Approved on board“ will be displayed here. Choose all vessels you like to see.

## Task Tracking

In this part all Task are available from the modules, Task Tracking, Audit & Inspect, Incident Report and Risk Assessment, in order of the available modules in your company. All Task are marked from which module they are.

There are three option which can be used:

- to check the tasks are assigned for the current user
- to check the tasks assigned for his own role.
- to check all task which are not assigned to users or roles or have no due date

### Overdue Tasks/Items/Deficiencies

The user can see all tasks/items/deficiencies that are overdue.  
In addition, you can activate the checkbox “Due in x days” for a forecast of the next task, which have to be done.

## **Certificates**

### **Overdue Site Certificates**

The function “Overdue Site Certificates” is used to check if the date of Time Frame Start, the Survey Date or the Expiry Date of a certificate of the selected vessel is smaller than the current date.

In addition, you can activate the checkbox “Due in x days” for a forecast of the Site certificates, which re will be overdue.

### **Overdue Component Certificates**

See „Overdue Site Certificates”

## **Other**

### **Show Contact Activities**

All Activities from contacts will be shown, which have not been yet closed and are allocated the current user.

## **Maintenance**

### **Check Critical Equipment**

All critical spare parts and spare part assigned to critical components where the stock is under defined minimum quantity will be shown for selected ships.

### **Check Overdue Jobs**

All overdue jobs for the selected vessels will be shown. The jobs can be displayed in different sort orders.

### **Change Requests available**

If your company use the function “change request” in the module maintenance all change requests for jobs, components or spare parts for the selected vessels will been shown.

## **Drugs**




### **Check planned external tests**

This function is used to check if there are planned external tests within the next x days for the selected vessels.

## **Incident Reports**

### **Overdue Incidents**

This is an overview for all incidents for the selected vessels which are older than 30 days but initially not approved. Note the following issues:

Status Explanation	
Status	Overdue Days
	30..59
	60..89
	>= 90

### Purchase

#### Purchase documents – Follow Up/Pinned to User Activities

All requisitions, requests for quotations or purchase orders will be displayed after confirming with „Follow up“ by current user.

#### Open Requisitions (Office only)

All open requisitions of the selected vessels are shown here. In next step, you have opportunity to approve open requisitions in „User Activities“.

### Risk Assessment

#### Open Risk Assessments

All open Risk Assessments not approved in Office of the selected vessels will be displayed here.

When your configuration is finished with “save” all changes will be taken over.

### Results

The working area can be displayed in HTML format in TAB “overview”

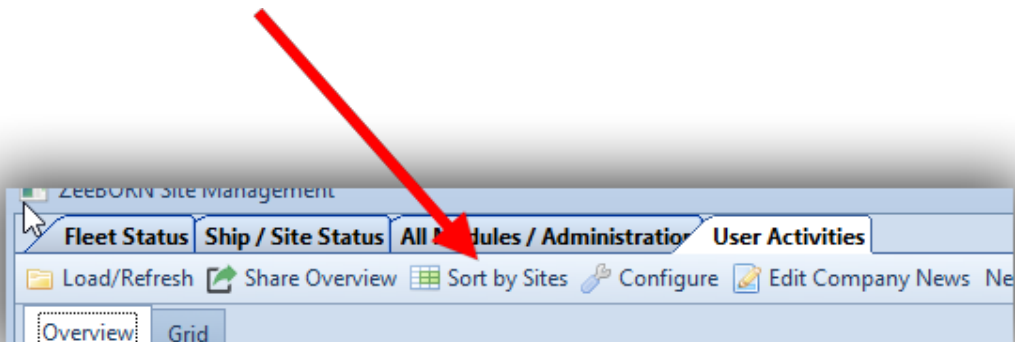
Fleet Status				Ship / Site Status		All Modules / Administration		User Activities	
<span>Load/Refresh</span> <span>Share Overview</span> <span>Configure</span> <span>Edit Company News</span>									
<span>Overview</span> <span>Grid</span>									
06.05.2011	PSM 100 Ship Visit	MT Stella Maris	YSM - FD 100 Ship Visit - Cameron LNG Terminal - 110506						
16.07.2013	PSM 100 Ship Visit	MT Stella Maris	YSM - FD 100 Ship Visit - Escobar, ArYSMntina - 130716						
14.04.2012	PSM 100 Ship Visit	MT Stella Maris	YSM - FD 100 Ship Visit - Higashi Ohgishima - 120414						
07.11.2012	PSM 100 Ship Visit	MT Stella Maris	YSM - FD 100 Ship Visit - Himeji - 121107						
<b>Critical Equipment</b>									
Site	Component	Spare Part		Minimum	Remaining				
MT Stella Maris	ME LO Circulating Pump No. 1 Starter (S)	Transformer(4110120002)		1	0				
MT Stella Maris	ME LO Circulating Pump No. 1 Starter (S)	Thermal relay(4110120001)		1	0				
MT Stella Maris	St. Gear Hydraulic Pump Starter No. 01	Motor relay(2110220017)		1	0				
MT Stella Maris	St. Gear Hydraulic Pump Starter No. 01	Transformer(2110220016)		1	0				
MT Stella Maris	St. Gear Hydraulic Pump Starter No. 01	Thermal relay(2110220004)		1	0				
MT Stella Maris	St. Gear Hydraulic Pump Starter No. 01	Magnetic contactor(2110220003)		1	0				
MT Stella Maris	ME Pneumatic Control System	Double non-return valve(3011801027)		1	0				
MT Stella Maris	ME Pneumatic Control System	3/2-way valve(3011801026)		1	0				
MT Stella Maris	ME Pneumatic Control System	Repair kit - 3/4 way valve(3011801023)		1	0				
MT Stella Maris	Pressure Controller - HDR14	PRESSURE CONTROLLER HDR 14(3811010001)		1	0				
MT Stella Maris	Water Level Gauge (Reflex Type)	WATER LEVEL GAUGE (R-Z 9+ 5)(3811002001)		1	0				
<b>Overdue Drills</b>									
Expected Date	Drill		Site						
25.5 - 31.5 (2016)	Bomb Threat		MT Stella Maris						
9.5 - 16.5 (2016)	Bomb Threat		MT Stella Maris						

or in a table in TAB "Grid".

The screenshot shows the 'All Modules / Administration' tab with a table of activities. The table has columns for 'Assigned By', 'Activity', 'Descripti...', 'Assigning Date', 'Type', 'Estimate...', and 'Specification'. The data is grouped by activity type, including Audit, Critical Equipment MT Stella Maris, Drill, Office Manager - Contact Activities, and SiteCertificate.

Assigned By	Activity	Descripti...	Assigning Date	Type	Estimate...	Specification
>	Activity Type : Audit					
>	Activity Type : Critical Equipment MT Stella Maris					
>	Activity Type : Drill					
>	Activity Type : Office Manager - Contact Activities					
(unknown)	Briefing			Meeting		
(unknown)	new assi...			Phone Call		
(unknown)	Invitation...			Phone Call	13.10.2011	
(unknown)	Invitation...			Phone Call	13.10.2011	
(unknown)	call to +4...			Phone Call		
(unknown)				E-Mail		
(unknown)				E-Mail		
(unknown)	Meeting ...			Direct Contact		
(unknown)				E-Mail		
(unknown)				E-Mail		
(unknown)				E-Mail		
(unknown)				E-Mail		
(unknown)	Payroll M...			Phone Call	23.09.2011	
(unknown)	call to +4...			Phone Call		
(unknown)	call to +4...			Phone Call		
>	Activity Type : SiteCertificate					
	Internati...			Class Society		overdue
	Tonnage			Class Society		overdue

Hit button „Sort by Sites“ to display both views sort by vessels.



## 7 Configuration/Administration

The Configuration/Administration module gives you access to all main configuration data that are important for the operation of the system.

Beside these configuration settings you will also find a separate Configuration option in most of the systems modules. Access to the modules configuration settings is provided via a button beside the Help button in the modules toolbar.

### 7.1 Global

The Global section contains configuration settings that apply to most of the modules of the system.

#### 7.1.1 Countries

All ZeeBORN modules come with a pre-defined country list containing all known countries and their codes according to ISO 3166 standard.

The list of countries cannot be changed - the list shown is for information only.

Whenever you find an error in the list, please inform the ZeeBORN support (see also [Support](#)<sup>[366]</sup>).

#### 7.1.2 Nationalities

All ZeeBORN modules come with a pre-defined list of nationalities. The editor contained in the administration tool can be used for maintaining and updating the list of nationalities. Whenever you find any necessary updated to be applied to this list, please inform also the [ZeeBORN Support](#)<sup>[366]</sup>. The support will take care that the requested changes will be part of the next system update.

#### 7.1.3 Currencies and Exchange Rates

In the Currency and Exchange Rates part of the Administrator module you can choose the currencies to be used in the system. The system itself contains nearly all currencies of the world but in most cases you will need a small selection of them.

Just set the currencies to be shown in the related modules (e.g. line item prices in Purchasing module) for making the selection of currencies much easier in these modules.

*Please note: The [online updating](#)<sup>[29]</sup> of exchange rates will be done only for currently active currencies.*

In the Exchange Rates part of this module you have access to the exchange rates for all currencies. You can enter current rates manually but you can also use the online update for getting the newest exchange rates for all currencies that have been set to "Active". The online updating of the exchange rates will be done by calling up the [Online Update](#)<sup>[29]</sup> gadget.

### 7.1.4 Official Company Header

This part of the configuration allows you to define the layout and logo to be used for the header in all created documents. Please note: this applies not to all created documents but only to documents intended to have a company header.

## 7.2 E-Mail

The E-Mail section contains configuration settings that apply to e-mail functionality.

### 7.2.1 Mail Template Categories

All mail templates can be grouped by Categories. All Categories are arbitrary. For adding and changing the Categories use "New" and "Rename". Only Categories which are not in use can be deleted.

## 7.3 Accounting

The Accounting section gives access to all settings that are relevant for the Budgeting and Purchasing module.

### 7.3.1 Cost Department/Category/Account

Create and manage you systems cost departments, accounts and categories by using the provided editing features.

First you will need to define the accounts/categories/departments to be used by the Fleet Management.

Each account in the system is defined by an account code and an account name. Fleet Management supports numerical and alpha-numerical account codes.

The account database is a simple list of account codes and their names. Use the functions on the right for adding, modifying or deleting accounts. As soon as an account has been used in the system, the account can no longer be deleted and the **Delete** button will no longer be available.

### 7.3.2 Cost Center

All Cost Center can be added with "New". They have to be defined by "Cost Center Name" and "Cost Center Code". Description can be insert. All Cost Center are arbitrary. Only Cost Center which are not in use can be deleted. All Cost Center which are no longer in use, have to be closed.



### 7.3.3 Cost Transfer Account

For Cost Transfer Account are "Cost Transfer Category", Cost Transfer Department" and "Cost Transfer Account" are predefined by system. Name and Code can be edited for "Cost Transfer Category", Cost Transfer Department" and "Cost Transfer Account". For "Cost Transfer Department" the short can also be edited.

### 7.3.4 Periods

The Fleet Management manages the budget based on budget limits within given periods. A period can be defined for handling monthly budgets but also for budgets per year.

Each period is defined by a start date, an end date and a title. If you prefer annual budgets you will set the start date to the 1st of January and the 31st of December. For a monthly budget use the first and last day of each month.

The title of a period is a free text. Enter you own title or leave it empty if you want to have the title automatically created by the program. The automatic generation of the title will just take the start date end end date of the period as title (e.g. "01.01.2007 - 31.12.2007").

### 7.3.5 Earnings/Deductions

It will define all earnings and deductions. Each category can only be either or. It can be marked, whether taxes are paid for.

### 7.3.6 Payment Conditions

All "Payment Conditions" are arbitrary. For each Condition a "Title", "Number", "Type", "Net Payment Term", "Skonto in percent" and "Skonto Days" can be defined. The "Title" and "Number" are mandatory.

Function	Description
Net Payment Term	How many days only the net cash has to be paid
Skonto in percent	How many percent is the cash discount
Skonto days	How many days the cash discount will be allowed

Skonto ☑ cash discount

### 7.3.7 Assign Accounts

For assigning the accounts, please choose “Site” and all assigned accounts will be visible. On right side all already assigned accounts will be displayed and on left side all not assigned accounts will be displayed. Left side you have to choose the Cost Department for seeing the accounts of this department. With “Assign” Accounts can be assigned to list and with “Remove” accounts can be erased from list. Accounts which are in use cannot be erased from list. This accounts have to be set as “Inactive” (see [Configuration – Cost Accounts](#)<sup>[35]</sup>). If accounts have to be used again, you can set as active in [Configuration – Cost Accounts](#)<sup>[35]</sup> or by clicking “Set as Active”. In [Configuration – Cost Accounts](#)<sup>[35]</sup> the account will be active for whole company and with “Set as Active” the account will be active only for this site.

### 7.3.8 Assign Limits

Budget limits are defined per site, period and account.

For the definition of budget limits you must first select a site from the **Sites** list. After selecting a site you will see the available periods, accounts and limits that might have been defined already. Click the button **Edit** for starting the editing of the budgets per account. Click the button **Save** for saving the changes to the database (this can take some seconds if the data will be saved for the first time) or click the button **Cancel** if you want to restore the data that have been valid before starting the editing of the budget limits.

### 7.3.9 Configure Invoice Registrator

Function	Description
Manage Payment Conditions	If <a href="#">Payment Conditions</a> <sup>[36]</sup> are configured, these conditions can be insert for Invoice Registrator. If payment conditions are predefined for companies, the conditions can be entered in <a href="#">Contact-Company Details</a> <sup>[75]</sup> . Or can be insert in Invoice Registrator for Supplier and Biller.
Send to Accounting (Simba)	Only if the accounting system “Simba” is in use in your company, “Send to Accounting” can be used. All data of registered invoices will be sent via file for importing in accounting system.
Use Customer Number	Our system has a unique number for each company in <a href="#">Contact Manager</a> <sup>[74]</sup> . The number will be given by system and cannot be changed.
Register and approve in one step	If the registration of the invoices will be done by user from Purchasing, register and approve

Function	Description
	of invoices can be done in one step.
Invoice Number mandatory	All invoices have an invoice number and the number has to be insert if checkbox is marked.
Use Pre Payment	If a prepayment has to be possible, the checkbox has to be marked.
Pay Day	If the payments in your company will be on the same business day at all times, please choose this business day from the list.

## 7.4 Department/Job Names

The Department/Job Names sections contains configuration settings for the Crewing module but also for Purchasing and Budgeting.

### 7.4.1 Departments Management

In the Department Management module you can define and configure the departments to be used on your ships.

The definition of departments will be done at this stage independent on what departments you will need on each ship. The department per ship will be defined at a later stage. The central department management just assures that the same departments on different ships will have the correct cost location assigned to.

#### New

For creating a new department first you will have to select the Departments root entry in the tree view.

This enables the **New** button in the detail data area. Just click the button **New** for creating a new department.

#### Edit

If you want to modify the details of an existing department just select the department in the tree view and click the button **Edit** for allowing the modification of the department details. After finishing the modification you'll have to click the button **Save** for saving the changed data to the database or **Cancel** if you want to restore the original content of the department record without saving the changes.

## 7.4.2 Jobs and Ranks Management

The Job Management module allows the definition of ranks to be used on board your ships. These definitions will be used in the Crewing module but also in other modules with relations to the ship's crew (e.g. responsible person for a maintenance job).

The Job Management module manages the jobs for all ships in a global view. The ranks and number of positions on each ship will be defined separately in the Rank List.

### new

A new job can be created in the Job Management main screen by clicking the button **New**. This activates the edit mode of the details area for entering the related information. After finishing the input click the button **Save** for saving the changes to the database or click the button **Cancel** if you don't want to save the changes.

### Details of a Job

<b>Office</b>	Activate this checkbox if the job represents an officers rank.
<b>Job Name</b>	The name of the job (e.g. Captain etc.)
<b>Abbreviation</b>	Some printouts use the abbreviation instead of printing the full name.
<b>Cost Location</b>	Enter the cost location account number of the job.
<b>Department</b>	Assign the job to a department (additional departments can be created by clicking the button Manage Departments)
<b>Job Description</b>	With the button Attach, Show and Delete you can manage the job description document that can be attached to each job defined in the list.

### Job Descriptions

The job lists allows you to attach a job description document to each each job shown in the list. The job description can be in any file format you prefer or at least in a file format that all of your colleagues can open and read on their PCs.

You can use the button **Check Job Descriptions** for getting a list of all jobs in the database that have no job description attached to them. After clicking this button you will see the list of all affected ranks. Choose a rank a click the button **Go to Job** to navigate directly to the selected job in the editor and for being able to attach the job description document.

## 7.5 Traveling

The Traveling sections contains configuration settings mainly used by the Crewing module.

### 7.5.1 Airports

In the Airports editor you can define the airports to be available in the system.

#### Deleting Airports

The deleting of an airport will be blocked by the system as soon as an airports entry has been used by the system modules (e.g. airport is assigned to a crew member in the Crewing module).

## 7.5.2 Ports

In the Ports Editor you can define the ports to be available in the system.

All ports in the list are organized by country and may also provide further information like relevant airports and agents.

### Deleting Ports

The deleting of a port will be blocked by the system as soon as a ports entry has been used by the system modules (e.g. port is assigned to a time table entry or port of delivery in the Purchasing module).

### Relevant Airports

The list of relevant airports contains all the airports that might be relevant for instance for crew changes in a selected port. This list can contain one or more airports and you may also define one of the airports as the default airport to be used.

The list of airports must be already filled with valid data before an airport can be assigned to a port. See also "[Airports](#)<sup>[39]</sup>".

### Relevant Agents

The list of relevant agents contains all the agents that might be relevant for instance for crew changes or other tasks in a selected port. This list can contain one or more agents and you may also define one of the agents as the default agent to be used.

The agents must be already defined in the system configuration.  
Hit button "Set as default" for preselection of an agent.

## 7.6 Sites/Ships

### 7.6.1 Configuration general

Enter topic text here.

### 7.6.2 Ship Types

For all sites a ship type can be managed (see [Ship/Site Status-Details](#)<sup>[23]</sup>). The ship types are arbitrary. With "New" a ship type can be added and with "Rename" the name of the ship type can be changed. Only ship types which are not in use can be deleted.

### 7.6.3 Site Certificate Groups

All Site Certificate can be sorted by Groups. All Groups are arbitrary. For adding and changing the Groups use “New” and “Edit”. Only Groups which are not in use can be deleted. For all groups the name and Code are mandatory. With field “Sort Order” the groups can be sorted. If no sort order is insert, the groups will be displayed in alphabetical order.

### 7.6.4 Certificates/Requirements

All certificates can be added, edited or deleted (if not in use). For certificates the name, Code and Group are mandatory. A new certificate can be added as a “Certificate” or “Sub Certificate”. For Sub Certificates the parent certificate has to be chosen before it can be added. If sort order will be used, the sort order is only active in the group of this certificate. Pre-warning days give the information at which time system starts with warning. With “Search” you can be looking for certificates by inserting letters or part of certificate names.

“Refresh” makes a refresh of the screen.

[“Assign Certificates to Sites”](#)<sup>42</sup> will show you the configuration part for assigning site certificates.

Function	Description
Expiry date input is mandatory	If checkbox is marked, an expired date has to be insert.
Issue date input is mandatory	If checkbox is marked, an issued date has to be insert.
Expected expire date in months	If issue date is mandatory, the expired date can be calculated by system. Expired date will be filled in with same day of issue date and issue date month plus insert months.
Range dates for renewal mandatory	If checkbox is marked, range dates have to be insert.
Range Start before in months	If system has to calculate the range dates, the Start and End in months have to be given. Dates are calculated: same day as issue date and issue date month plus or minus months.
Range End after in months	
Manage survey date (mandatory)	If checkbox is marked, a survey date has to be insert.
Is Site Certificate	Checkbox is marked per default. If the inserted certificate is a SBM or Component certificate, please erase the mark from checkbox.

Function	Description
Description	A description can be given.
Use Description in Printout	If a description is given, the description will be shown on printout.

### 7.6.5 Assign Certificates to Sites

On left side of screen all sites will be shown and on right side all site certificates sorted by groups will be available.

Select site and with "Edit" all site certificates can be allocated. With "Save" all changes will be written in system and with "Cancel" all changes will be refused.

With "copy" all allocated certificates can be copied to other sites.

Select site(s) to copy certificate requirements to - hit replace, if you want to replace a former assignment.

### 7.6.6 Assign SBM/Component Certificates to Sites

On left side of screen all sites will be shown and on right side all SBM/component certificates sorted by groups will be available.

Select site and with "Edit" all SBM/component certificates can be allocated. With "Save" all changes will be written in system and with "Cancel" all changes will be refused.

With "copy" all allocated certificates can be copied to other sites.

Select site(s) to copy certificate requirements to - hit replace, if you want to replace a former assignment.

### 7.6.7 Insurance Groups

All Insurances can be sorted by Groups. All Groups are arbitrary. For adding and changing the Groups use "New" and "Rename". Only Groups which are not in use can be deleted.

The groups will be displayed in alphabetical order.

### 7.6.8 Insurances

On the left side of the screen you will see the insurances. In TAB "Sort by Name" all insurances will be shown in alphabetical order. Click on TAB "Sort by Group" and the insurances will be shown sort by group. On the right side the details of the selected insurance will be shown.

For adding and changing Insurances use “New” and “Edit”. Only Groups which are not in use can be deleted. With “Cancel” all changes will be ignored and with “Save” all changes will be added. Only insurances which are not in use can be deleted.

With “Assign Insurance to ship” you can switch directly to [Configuration – Assign Insurance to Ships](#)<sup>43</sup>.

With “Manage Ship Insurance Groups” you can switch to [Configuration – Insurance Groups](#)<sup>42</sup>.

### 7.6.9 Insurance Case Categories

Manage Case categories used for insurance cases.

### 7.6.10 Assign Insurances to Ship

On left side of screen all sites will be shown and on right side all insurances sorted by groups will be available.

Select site and with “Edit” all insurances can be allocated. With “Save” all changes will be written in system and with “Cancel” all changes will be refused. With “copy” all allocated certificates can be copied to other sites.

### 7.6.11 Time Table Status

On left side of screen all Time Table States will be shown and on right side the states of time table states will be visible and editable.

New Time Table States van be added with “New”. Select Time Table State and with “Edit” all states of the time table states can be allocated. With “Save” all changes will be written in system and with “Cancel” all changes will be refused.

Only not in use time table states can be deleted.

Function	Description
Crew change allowed	<b>Is needed for Crewing</b> in this state it is allowed to change the crew.
One port	If the state is only in one port this point has to be marked for correct view in time table
Activities allowed	When checkbox marked, activities can be assigned here
Show in overview	State will be visible in <a href="#">time table overview</a> <sup>22</sup>
Berthing information	If a berthing time has to be documented in time table, check box has to be marked
Is sea time	If time table state is only sea time, please set checkbox as marked



Function	Description
Short	A short code can be given for time tabl state
Color	Set the color with which the the table state will be visible in calendar (not in use currently)

### 7.6.12 Activities

With “New” an activity can be added and with “edit” the details of activities can be changed. Only activities which are not in use can be deleted. For all activities a remark can de added.

### 7.6.13 Required Fields

For the input of contacts (Crew, guests, supplier etc.) requirements can be established..

### 7.6.14 Dashbord Items

Dashboard Item	Description
Details	check, if all required details (configuration via administration) are filled
Assignments	check, if all required positions on board are assigned correctly
Ranklist	check, if ranklist is assigned to site
Ship Certificates	check, if all required ship certificates are available and not overdue.
Ship Insurance	check, if all required ship insurances are available.
Task Tracking	check, if open or overdue tasks are available.
Time Table	check, if time table is available and completed.
Time Table (confirmed)	check, if all entries till today are confirmed.
Maintenance	check, if overdue maintenance jobs are available.
Critical Equipments	check, if quantity of parts assigned to critical components is less than required minimum

Dashboard Item	Description
	quantity.
Budget	check, if cost account value is exceeds the limit (if no limit is assigned, limit will be set to zero.
Budget (limits only)	check, if cost account value is exceeds the limit (limit has to be assigned)
Budget (Category check)	check, if cost category value is exceeds the limit (limit has to be assigned)
Crew Certificates	check, if certificates of current crew on board are correct.
Crew Certificates Onsigner	check, if certificates of Onsigner are correct.
Data Replication	check, if data replication is correct
Audit and Inspect	check, if all inspections are correct (no overdue due date / review dates)
Drills	check, if no planned drill is overdue.
Drugs and Alcohol	check, if no drug test is overdue.
Component Certificates	check, if all component certificates are available not overdue.

### 7.6.15 Specified Use

To have only needed sites in the modules, please select all modules for each site. Select site and hit "edit" for changes. With "Get from License" you can insert the configurations as per license paid.

"Not relevant for Budget" is for all site which are used in Purchase and no budget information are needed.

## 7.7 Contacts

In the Contacts section you'll find all settings that are relevant for contact management.

### 7.7.1 Contact Categories

All Contact Categories can be used for Company contact, crewing or purchase contacts. **Categories in gray letter are system categories and name cannot be changed.**

With "New" a new category can be added and with "Edit/Rename" all categories can be changed.

Only categories which are not in use can be deleted.

System categories can never be deleted.

**Responsibilities** are available for Contacts only (not for companies).

### 7.7.2 Address Types

**Address types in gray letter are system types and name cannot be changed.**

With "New" a new type can be added and with "Rename" the name of the type can be changed. Only address types which are not in use or system type can be deleted.

### 7.7.3 Correspondence Languages

All languages that are needed in the system have to collect here. This is not for languages in which the system is installed.

### 7.7.4 Transportation Types

**Only available in Crewing!**

For all crew changes a transportation type can be managed. The transportation types are arbitrary. With "New" a transportation type can be added and with "Rename/Edit" the name of the transportation type can be changed. Only transportation types which are not in use can be deleted.

### 7.7.5 Event Types

Event types are in use for all communication notes. The names of event types are arbitrary. With "New" an event type can be added and with "Rename" the name of the event type can be changed. Only event types which are not in use can be deleted.

### 7.7.6 Event Results

All possible results of events can be added with "New" and names can be changed with "Rename". Only event results which are not in use can be deleted.

### 7.7.7 Comment Types

For all comments in the system, types have to be used. All possible comment types can be added with "New" and can be changed with "Edit". Only comment types which are not in use can be deleted. For each comment type a Right Level has to be given.

### 7.7.8 Activity Categories

All Activity Categories are arbitrary. For adding and changing the Categories use "New" and "Rename". Only Categories which are not in use can be deleted.

### 7.7.9 Rating Types

All Rating Types are arbitrary. For adding and changing the types use "New" and "Edit". Only Rating Types which are not in use can be deleted.

### 7.7.10 Rating Intervals

All Rating Intervals are arbitrary. For adding and changing the types use "New" and "Edit". Only Rating intervals which are not in use can be deleted.

All rating intervals has a start and end decimal number. As all ratings are an average of all rater, the rating result will be mostly a decimal number.

### 7.7.11 Rating Warning Level

For Purchase and Crewing a decimal number can be given. Supplier or Agents which are under this average rating level will be displayed in System "Please note ... rating is bad!".

## 7.8 Crewing

### 7.8.1 Training Types

General trainings types will define. If trainings types are unique, certificates can also be registered. The certificate wills gives, if the training has been completed successfully. As soon as a final test or examination is required, this training can be marked with "result required".

### 7.8.2 Certificate Groups

All certificates can be sorted by groups. All Certificate Groups are arbitrary. For adding and changing the Categories use "New" and "Edit/Rename". Only groups which are not in use can be deleted.

### 7.8.3 Certificates / Requirements

All certificates are given with Abbreviation letters and are assigned to a group. Every certificate can be marked as a travel document. With this the system can be verified whether this certificate is valid.

Either all certificates are declared with expiry date, as unlimited or with date of issue.

All unlimited certificates must be given once and keeps her validity for the whole time in that an employee is active.

Every certificate with an expiry date has a pre warning time. This is directed afterwards how long it takes to renew the certificate.

All certificates which have a date of issue are checked by the day of the rise whether at that time that the condition certificate is not older than x days is fulfilled.

Certificates can have defined level and Limitations. These are freely determinable and the system checks also the level and limitation for the application.

Because as some certificates must be circumscribed for the respective flag states, there is an Importance level included. With this level it can be defined, if a certificate has to be issued or only had to be applied.

A short description can be given for every certificate.

Certificates can be assigned to a certificate and it will be valid with the renewal of the parent certificate too.

### 7.8.4 Assign Certificates to Jobs

#### **TAB Assign several certificates to job**

On left side of screen all jobs will be shown and on right side all certificates sorted by groups will be available.

Select job and with "Edit" all certificates can be allocated. With "Save" all changes will be written in system and with "Cancel" all changes will be refused.

#### **TAB Assign certificate to several jobs**

On left side of screen all certificates will be shown and on right side all jobs sorted by departments will be available.

Select certificate and with "Edit" all jobs can be allocated. With "Save" all changes will be written in system and with "Cancel" all changes will be refused.

### 7.8.5 Contract Templates

All contract documents are sorted by nationality.

### 7.8.6 Relationships NOK

Relationships are already included in the system. In addition, data needed, can be individually entered.

### 7.8.7 Assignment Status

For all statuses of the following characteristics can be identified:

- a site must be entered
- can be a crew change at the beginning or end of the assignment
- a statement must be entered with the keeping of this assignment
- On / Off Signer relevant
- Assignment have to be unaffected in the planning
- overtimes can be occurred during this assignment

### 7.8.8 Accounting Keys

The accounting keys are designed to facilitate the interfaces to external billing systems. Values can be defined for passing directly into the external system.

## 7.9 Applicant Manager

### 7.9.1 Application Types

All application types are arbitrary. For adding and changing the application types use “New” and “Rename”. Only types which are not in use can be deleted.

## 7.10 Purchasing

### 7.10.1 Units

All units are arbitrary. For adding and changing the units use “New” and “Rename”. Only units which are not in use can be deleted.

### 7.10.2 Transportation Details

All transportation details are arbitrary. For adding and changing the transportation details use “New” and “Rename”. Only transportation details which are not in use can be deleted.

### 7.10.3 Additional Cost Types

All additional cost types are arbitrary. For adding and changing the additional cost types use “New” and “Rename”. Only additional cost types which are not in use can be deleted.

### 7.10.4 Configuration (general)

Manage mail texts for sending purchase documents per mail.

#### Individual Signature

To use individual signatures for RQ, RfQ and PO Mail Text hit check box "Add individual signature to Mail text" in Configuration (general).

The individual signature is then built from name, mail and phone number of the logged in user.

## 7.11 Task Tracking/Audits & Inspections/Incidents

All Hazard Categories are arbitrary. For adding and changing the Hazard Categories use "New" and "Edit". For each Category a Code can be given. Used Categories can be set inactive with mark the checkbox "Inactive". Only Hazard Categories which are not in use can be deleted. The Hazard Categories can be exported to Excel with "Export to Excel".

### 7.11.1 Audit Configuration

There are some details for Audits that have to be configured.

"Final Verification Remark is Mandatory" If checkbox is marked, a remark has to be given by final verification.

"Complete Last Item -> Send Audit automatically to Final Verification"

**This point is only needed for Office.** If checkbox is marked, the audit will be switched to folder "Final Verification" without approving.

"Final Verification and Closing in one Step" If checkbox is marked, the audit will be closed automatically and cannot be distributed to other ships.

### 7.11.2 Task Tracking Configuration

For Module "Task Tracking", items in Audit and items in Incident can be configured, that the due date can be changed also in a past date by marking the checkbox "Assigning Due in past is allowed".

### 7.11.3 Audit Type Groups

All Audit Types can be sorted by Groups. All Groups are arbitrary. For adding and changing the Groups use “New” and “Rename”. Only Groups which are not in use can be deleted.

### 7.11.4 Audit Types

There are three pre-defined system audit types. All other audit types are arbitrary. For all types is it possible to predefine distributing sites, Item Categories and Item Groups. Also it is possible to configure the visibility of the item number. For every type a time frame and the period between two inspections can be defined. All types for use in the Audit Check Report have to be marked in the configuration. If type don't need to be planned, it has to be marked too.

For adding a Type use “New”. All Audit Types in gray are system types and cannot renamed or deleted. Only Audit Types which are not in use can be deleted.

Function	Description
Days till next inspection	Has to filled in the days between two audits or inspections of this type has to be executed.
Days before (Time Frame)	How many days before the planned date the inspection/audit can be executed.
Days after (Time Frame)	How many days after the planned date the inspection/audit can be executed.
Exclude from next audit planning	If checkbox is marked, no automatically planning is done and the part above do not have to filled in.
Show item numbers (if item groups are assigned) / Mandatory	Item numbers can be shown in report if item groups are assigned. And if checkbox “mandatory” is marked, the item number has to be shown and item groups must be assigned.
Set as inactive	All types which are in use can be set as inactive, that they cannot be chosen in further.
Show regions	If checkbox is marked, regions has to be filled in.

Item Categories, Item Groups and Sites for Distributing can be selected for each Audit Type when edit is in use by clicking on the corresponding TAB and clicking on needed Category, group or site.



### 7.11.5 Audit/Item Categories

For adding a Category use “New”, name and Abbreviation has to be given. All Audit/item Categories in gray are system types and cannot renamed or deleted. All other Item Categories are arbitrary. Only Categories which are not in use can be deleted.

The Item Categories are also available in Task Tracking and Incident Report if predefined.

Mark checkbox “is inspection category”, if the category has to be available in module “Audit & Inspection”. If checkbox “use in Inspection Check Report” is marked, the category is included in Inspection Check Report.

Mark checkbox “is incident report category”, if the category has to be available in module “Incidents”.

Mark checkbox “Possible consequences mandatory” that in reports the possible consequences has to be filled in.

#### Corrective/ Preventive Action

Function	Description
No Corrective/preventive action	If checkbox is marked, no actions have to be filled in.
Show corrective/preventive action as free text	A free text can be filled in for corrective and for preventive action.
Show Immediate Action as free text	A free text can be filled in for immediate action
Actions are mandatory	If checkbox is marked all actions have to be filled in.
Corrective/preventive action as single track items	If checkbox is marked, the corrective and preventive actions will be filled in as items (which are under the report but a of the report).

#### Root Cause & Analysis

Function	Description
Show Root Cause as Drop Down List	If checkbox is marked, the list of defined root causes will be available
Show (additional) Root Cause as free Text / Mandatory	Additionally, the checkbox can be marked, for a root cause as free text. If “mandatory” is marked, the free text has to be given.
Show additional risk analysis/accountab. / Mandatory	Additionally, a risk analysis and accountability will be shown, when checkbox

Function	Description
	is marked. If "mandatory" is marked, the free text has to be given.
Show additional SIRE reference / Mandatory	Additionally, the list of predefined SIRE references will be shown, if checkbox is marked. If "mandatory" is marked, the free text has to be given.

### Due Date

Function	Description
Remark mandatory when postponing due date	If checkbox is marked, a remark has to be given for postpone of the due date.
Due date mandatory	Due date must be filled in, when checkbox is marked.
Due Date Default days	If a number will be insert, the system will set the due day. Execute date + default days

### 7.11.6 Entities

All modules can be sorted by entities. All Entities are arbitrary. For adding and changing the entities use "New" and "Edit". A short to each entity has to be given. Only entities which are not in use can be deleted.

### 7.11.7 Modules

All modules are arbitrary. For adding and changing the entities use "New" and "Edit". A description to each module can be given. Only modules which are not in use can be deleted.

### 7.11.8 Audit/Item Status

These are all system statuses. The visibility of the statuses can only be defined and changed.

### 7.11.9 Audit/Item Standard

Use item standards for grouping and versioning item groups and numbers, for instance VIQ 6, VIQ 7.

Please find more detailed information under:

<https://doc.zeeborn.net/viq-standards.htm>

### 7.11.10 Audit/Item Groups

Item Groups are arbitrary. Descriptions for Item Groups are needed.

### 7.11.11 Audit/Item Number

Item Numbers are arbitrary. The Item Number has to be allocated to an item Group. All item numbers will be sorted by Item groups. With “New” a new item number can be added. For all item numbers a title and description can be insert. With “Edit” on all item numbers can be worked. Only item numbers which are not in use can be deleted.

### 7.11.12 Root Causes

All root causes are sorted by Root Cause Categories. All root causes are arbitrary. For adding and changing the root causes use “New” and “Edit”. A description to each root cause can be given. Only root causes which are not in use can be deleted.

### 7.11.12. Root Cause Categories

All root causes are sorted by Root Cause Categories. All root cause categories are arbitrary. For adding and changing the categories use “New” and “Edit”. A description to each category can be given. Only root cause categories which are not in use can be deleted.

### 7.11.13 SIRE References

All SIRE references are arbitrary. For adding and changing the SIRE references use “New” and “Edit”. A description to each SIRE reference can be given. Only SIRE references which are not in use can be deleted.

### **7.11.14 Accountability**

All Accountabilities are arbitrary. For adding and changing the accountabilities use "New" and "Rename". Only accountabilities which are not in use can be deleted.

### **7.11.15 Regions**

All Regions are arbitrary. For adding and changing the regions use "New" and "Rename". Only regions which are not in use can be deleted. The regions can be printed and saved with "share".

### **7.11.16 Incident/Accident Types**

All Incident /Accident Types are arbitrary. For adding and changing the Incident /Accident Types use "New" and "Edit". A description to each Incident /Accident Type can be given. Only Incident /Accident Types which are not in use can be deleted. The Incident /Accident Types can be printed and saved with "share".

### **7.11.17 Incident/Accident Locations**

All Incident /Accident Locations are arbitrary. For adding and changing the Incident /Accident Locations use "New" and "Edit". Only Incident /Accident Locations which are not in use can be deleted. The Incident /Accident Locations can be printed and saved with "share".

### **7.11.18 Incident/Accident or Audit Position**

All Incident /Accident or Audit Positions are arbitrary. For adding and changing the Incident /Accident or Audit Positions use "New" and "Edit". For each Incident / Accident or Audit Position has to be marked, if position is a port, on sea or both. Only Incident /Accident or Audit Positions which are not in use can be deleted. The Incident /Accident or Audit Positions can be printed and saved with "Share".

### **7.11.19 Incident/Accident Sea State**

All Incident /Accident Sea States are arbitrary. For adding and changing the Incident /Accident Sea States use "New" and "Rename". Only Incident /Accident Sea States which are not in use can be deleted. The Incident /Accident Sea States can be printed and saved with "Share".

### 7.11.20 Incident/Accident Source of Lighting

All Incident /Accident Source of Lightings are arbitrary. For adding and changing the Incident /Accident Source of Lightings use “New” and “Rename”. Only Incident /Accident Source of Lightings which are not in use can be deleted. The Incident /Accident Source of Lightings can be printed and saved with “Share”.

### 7.11.21 Incident/Accident Wind Direction

All Incident /Accident Wind Directions are arbitrary. For adding and changing the Incident /Accident Wind Directions use “New” and “Rename”. Only Incident /Accident Wind Directions which are not in use can be deleted. The Incident /Accident Wind Directions can be printed and saved with “Share”.

### 7.11.22 Incident/Accident Wind Force

All Incident /Accident Wind Forces are arbitrary. For adding and changing the Incident /Accident Wind Forces use “New” and “Rename”. Only Incident /Accident Wind Forces which are not in use can be deleted. The Incident /Accident Wind Forces can be printed and saved with “Share”.

### 7.11.23 Incident/Accident Weather Type

All Incident /Accident Weather Types are arbitrary. For adding and changing the Incident /Accident Weather Types use “New” and “Rename”. Only Incident /Accident Weather Types which are not in use can be deleted. The Incident /Accident Weather Types can be printed and saved with “Share”.

### 7.11.24 Accident Types

All Accident Types are arbitrary. For adding and changing the Accident Types use “New” and “Rename”. Accident Types marked “As system type” are system type and cannot be deleted or edited. All accident Types which are in use can be set as inactive or can be set as active. Only one of the buttons will be visible. An active type only can be set inactive and an inactive type only can be set active. Only Accident Types which are not in use can be deleted. The Accident Types can be printed and saved with “Share”.

### 7.11.25 Personal Accident

All Personal Accidents are arbitrary. For adding and changing the Personal Accidents use "New" and "Rename". Only Personal Accidents which are not in use can be deleted. The Personal Accidents can be printed and saved with "Share".

### 7.11.26 Incident Configuration (general)

If checkbox "Types in closed Folder" is marked, all reports will be shown under Incident type. Default the reports will be shown in closed folder sorted by year and month. For Incident a help manual can be added and shown in module.

### 7.11.27 Accident Injury (Personal)

All Accident Injuries are arbitrary. For adding and changing the Accident Injuries use "New" and "Rename". Only Accident Injuries which are not in use can be deleted. The Accident Injuries can be printed and saved with "Share".

### 7.11.28 SDR Defect Category

All SDR Defect Categories are arbitrary. For adding and changing the SDR Defect Categories use "New" and "Rename". Only SDR Defect Categories which are not in use can be deleted. The SDR Defect Categories can be printed and saved with "Share".

### 7.11.29 Configure Incident Report Types

With "Edit" all incident reports can be prepared.

#### TAB Details

##### Corrective/ Preventive Action

Function	Description
No Corrective/preventive action	If checkbox is marked, no actions have to be filled in.
Show corrective/preventive action as free text	A free text can be filled in for corrective and for preventive action.
Show Immediate Action	A free text can be filled in for immediate action. Is only eligible, when "Show

Function	Description
	corrective/preventive action as free text” was be chosen.
Corrective/preventive action as single track items	If checkbox is marked, the corrective and preventive actions will be filled in as items(which are under the report but a of the report.
Actions are mandatory	If checkbox is marked all actions have to be filled in.

### Root Cause & Analysis

Function	Description
Show Root Cause as Drop Down List	If checkbox is marked, the list of defined root causes will be available
Show (additional) Root Cause as free Text	Additionally, the checkbox can be marked, for a root cause as free text.
Show additional risk analysis.	Additionally, a risk analysis and accountability will be shown, when checkbox is marked.
Show additional SIRE reference	Additionally, the list of predefined SIRE references will be shown, if checkbox is marked.

### General

Function	Description
Distribute to all sites Review required	If checkbox is marked, Incident Reports can be distributed to other sites. If “Review required” is marked, it possible to request a review mark from site.
Approval in Office Remark is mandatory	If checkbox is marked, a remark must be given.
Show environmental Details	If checkbox is marked, the environmental details have to be filled in.
Show Jobname (reported by)	If checkbox is marked, in area “Reported by” not only names can be given also jobnames from system can be added.

Function	Description
Show Priority	If checkbox is marked, a priority of report can be given.
Show Accident TAB	If checkbox is marked, the TAB "Accident Type" will be shown and can be filled in.
Show additional problems TAB	If checkbox is marked, the TAB "Additional Problems" will be shown.

## 7.12 Risk Assessment

### 7.12.1 Hazard Categories

All Hazards are sorted by Hazard Categories. All Hazards are arbitrary. For adding and changing the Hazards use "New" and "Edit". A description to each Hazards can be given. Used Hazards can be set inactive with mark the checkbox "Inactive". Only Hazards which are not in use can be deleted. With "Merge Duplicates" Hazards can be merged to one. For that the hazard which will be in system has to selected and all other marked hazards will be merged into this hazard. Hit "Search" for looking after hazards.

### 7.12.2 Operation Types

All Operation Types are arbitrary. For adding and changing the Operation Types use "New" and "Edit". For each Operation Type a Code can be given. Used Operation Types can be set inactive with mark the checkbox "Inactive". Only Operation Types which are not in use can be deleted. The Operation Types can be exported to Excel with "Export to Excel".

### 7.12.3 Operation Groups

All Operation Groups are arbitrary. For adding and changing the Operation Groups use "New" and "Edit". For each Operation Group a Code can be given. Used Operation Groups can be set inactive with mark the checkbox "Inactive". Only Operation Groups which are not in use can be deleted. The Operation Groups can be exported to Excel with "Export to Excel".

### 7.12.4 Operations

All Operations are arbitrary. For adding an operation use "New". For each operation, a type and a group has to be given. In addition, Operations code, can be added. The operations can be linked to components (TAB Assigned to Components) and to Job Codes (Tab Assigned to Job Codes). You can assign more than one job code and more than one component and both too. With "edit" changes can be made. Only operations which are not in use can be deleted.



All other operations will be set as inactive with “Set as inactive” and can be activated with “Set as active”. Only one of these buttons will be visible in order of the status. The operations can be printed and saved with “Share”.

### 7.12.5 Risk Matrix

Hit “New” for adding a new Risk Matrix. The Risk Matrix can be added as new, can be copied from existing Matrix or can be created a new version of existing Risk Matrix. A name, severities, likelihoods, risk level and the matrix has to be given. The risk matrix can be approved with “approve” and one of the approved matrices can be set as default with marking the relevant checkbox. Old version can be closed. And in screen only active matrices will be shown, when checkbox “Show active only” is marked. Only matrices which are not in use can be deleted.

#### Severity

All Severities are arbitrary. For adding and changing the Severities use “New” and “Edit”. Only Severities which are not in use can be deleted. The Severities can be printed and saved with “Share”.

For all Severities, a name and sort order has to be given, and Description, Health/Safety, Environment, Operational Impact and Media Attentions can be given.

#### Likelihood

All Likelihoods are arbitrary. For adding and changing the Likelihoods use “New” and “Edit”. Only Likelihoods which are not in use can be deleted. The Likelihoods can be printed and saved with “Share”.

For all Likelihoods, a name and sort order has to be given, and Description can be given.

#### RiskLevel

All Risk Levels are arbitrary. For adding and changing the Risk Levels use “New” and “Edit”. Only Risk Levels which are not in use can be deleted. The Risk Levels can be printed and saved with “Share”.

For all Risk Levels, a name, a color and sort order has to be given, and Reassess in days and actions can be given. With “Set as High Risk Level” a risk level can be set as high level risk.

#### Matrix

For changing the Risk Matrix use “Edit”. Approved Risk Matrices cannot be changed. Hit “Show complete matrix” to see all information to this matrix. The Risk Matrix can be printed and saved with “Share”.

### 7.12.6 Risk Assessment Configuration

For Module "Risk Assessment" general configuration can be edited.

Function	Description
Reopening Days Check for Re-Opening	If checkbox is marked, RA will be checked for automatically reopening after days which are insert in "reopening days".
Send Additional Measure Tasks to Audit & Inspection	If checkbox is marked, approved additional measure will be sent to Audit & Inspection. Info Text at approving will be displayed with corresponding to this rule.
Rate Hazards	If checkbox is marked, the hazards has to be rated too.
Show Details (Description /Alternate Method mandatory)	First page of preparation of, RA will be displayed with description and alternate method, when checkbox is marked.
Show Further Action Types	If checkbox is marked, further action types will be displayed. Checkbox will be visible, when checkbox "Show Further Actions" is marked.
Show Further Actions	If checkbox is marked, TAB "Further Actions" will be displayed.
Show Authorization	If checkbox is marked, TAB "Authorization" will be displayed.
Show Assessment Conditions	If checkbox is marked, TAB "Risk Conditions" will be displayed.
Use Templates	If checkbox is marked, templates can be used.
Clean Hazard Assignments (in case of copying from template/version controlled RA)	If checkbox is marked, all data from templates will be deleted.
SMS Form mandatory	If checkbox is marked, SMS Form has to be attached.
SMS Sections mandatory	If checkbox is marked, SMS Section has to be attached.
Show Operation Code (in Tree and Operation Selection form)	When checkbox is marked, the operation code will be displayed in tree of operations.
Approval Remark mandatory	If checkbox is marked, a remark must be given during approval.

Function	Description
Approve and close in one step	If checkbox is marked, a RA will be closed in same step when RA will be approved.
Use extra ordinary risk assessments	If checkbox is marked, the area extra ordinary risk assessments will be displayed.
Warn if RA for selected Operation already exists	When checkbox is marked, a warning will be given, when an actual RA for the operation already exists.
Reviewed by mandatory	Checkbox can only be chosen, when checkbox "Show Authorization" is marked. When checkbox is marked, fill in of "Review By " is mandatory.
Reported by mandatory	Checkbox can only be chosen, when checkbox "Show Authorization" is marked. When checkbox is marked, fill in of "Reported By " is mandatory.

### 7.12.7 Critical Equipment Types

All Critical Equipment Types are arbitrary. For adding and changing the Critical Equipment Types use "New" and "Rename". Only Critical Equipment Types which are not in use can be deleted. The Critical Equipment Types can be printed and saved with "Share".

### 7.12.8 Further Action Types

All Further Action Types are arbitrary. For adding and changing the Further Action Types use "New" and "Rename". Only Further Action Types which are not in use can be deleted. The Further Action Types can be printed and saved with "Share".

## 7.13 Dry Docking

All Drill Groups are arbitrary. For adding and changing the Drill Groups use "New" and "Edit". For each drill group a description can be given. Only Drill Groups which are not in use can be deleted.

### 7.13.1 Services

All Services are arbitrary. For adding and changing the Services use “New” and “Rename”. Only Services which are not in use can be deleted.

### 7.13.2 Material

All Materials are arbitrary. For adding and changing the Materials use “New” and “Rename”. Only Materials which are not in use can be deleted.

### 7.13.3 Enclosure

All Enclosures are arbitrary. For adding and changing the Enclosures use “New” and “Rename”. Only Enclosures which are not in use can be deleted.

### 7.13.4 Survey by

All Survey by names are arbitrary. For adding and changing the Survey by names use “New” and “Rename”. Only Survey by names which are not in use can be deleted.

### 7.13.5 General Configuration

For Module “Dry Docking” general configuration can be edited.

Function	Description
Use Catalog Job Cards	If checkbox is marked, it is possible to use <a href="#">Catalog Job cards</a> .
Specification is mandatory	If checkbox is marked, a Specification must be given.

### 7.13.6 Catalog Groups

All Catalog Groups are arbitrary. For adding and changing the Catalog Groups use “New” and “Edit”. For each Catalog Group a code must be given and a description can be given. Only Catalog Groups which are not in use can be deleted. The Catalog Groups can be printed and saved with “Share”.

### 7.13.7 Catalog (Jobcards)

For each catalog job card all information can be predefined. Hit "New" for add a Job Card. Choose Catalog group and the numbering will be insert automatically. A title has to be given and all other information can be given. Numbering of job Cards will be given in order of the inserting.

### 7.13.8 Additional Costs

All Additional Costs are arbitrary. For adding and changing the Additional Costs use "New" and "Edit". For each Additional Cost a description can be given. Only Additional Costs which are not in use can be deleted. The Additional Costs can be printed and saved with "Share".

## 7.14 Drill Plan

### 7.14.1 Drills

All Drills are arbitrary. For adding and changing the Drills use "New" and "Edit". For each drill a description and Check days (unplanned drills) can be given. If check days are defined, all unplanned drills of this type will be checked, if a planned drill is in this days available for Execution. If checkbox "set as inactive" will be marked, the drill will be set inactive. For each drill documents, can be attached. Only Drills which are not in use can be deleted. To each Job card one or more Sub Job cards can be added. With "Share Overview" all job cards can be printed and saved. With "Share selected Details" all details of a job card can be printed or saved.

### 7.14.2 Emergency Equipment

All Emergency Equipment are arbitrary. For adding and changing the Emergency Equipment use "New" and "Edit". Or Emergency Equipment a sort order can be given. Only Emergency Equipment which are not in use can be deleted.

## 7.15 System

### 7.15.1 User Management

The User Management module is the central place for defining the access rights for all users in all ZeeBORN modules.

### 7.15.1.1 Using Roles

The ZeeBORN User Management allows the management of users access rights by using roles.

#### The Basic Concept

For just a few users it might not be a big problem to manage the access rights user by user. But with an increasing number of users it's very suitable having the access rights management via roles. Instead of managing the access rights for each single user you can create a role, set the access rights for this role and then you just assign this role to selected users. Every user you assign this role to will automatically get the access rights of this role.

Example: Let's assume you have to assign a selected number of access rights to all masters in your database. Instead from choosing each master in the user list and modifying his access rights according to the requirements you can create a role called "Masters" and you define the access rights for this role - only once. After having the role ready you assign this role to each master in the user list. By doing so each master will have the access rights as defined in the role.

Maybe later on a decision has been made that all masters will get an additional access right. Instead of finding all the masters in the user list and updating their access rights accordingly you just choose the "Master" role and change the access rights their. The changes in the "Master" role will automatically assigned to all masters in the user list having the "Master" role

#### But if ...

there is only one master who will get one additional access right that other masters don't have the role concept might not work. But that's not a problem. You can still individually decide what access rights are to be assigned to each single user. So in this case just go to the related master in the user list and assign the access right you want. This concept also works for removing an access right from a user even if it was given to him by assigning a role that includes this access right.

### 7.15.1.2 E-Mail Account Configuration

In the details screen for the user details you can also call up the configuration screen for setting up an e-mail account for this user. Creating an e-mail account for a user will allow him to send e-mails with the related features available within the ZeeBORN System.

Following parameters must be set for using the e-mail account:

<b>Name</b>	Name of the user to be displayed as the sender of an e-mail.
<b>E-Mail</b>	The e-mail address of the user.
<b>Server Requires Login:</b>	Most e-mail servers required to authenticate before sending an e-mail. Tick this checkbox if this also applies to the e-mail system used by your company.
<b>SMTP Account Settings: Server Name</b>	Full name of your e-mail server (SMTP server) used for outgoing e-mails.

**SMTP Account Settings:** User identifier to be used for logging in to the e-mail server  
**Login Name**  
**SMTP Account Settings:** Password to be used for the login.  
**Password**

### 7.15.1.3 Login

If you see the login screen for the first time, please read "[First Login](#)". There you will find further information about the default password after a fresh installation of the system and also some general guidelines for managing the Administrator user account.

Usually you will choose your name from the **Name** list and enter your password. The checking of your account details will start as soon as you press the **Login** button. If the selected name and the entered password are correct, you will get access to the application or module you have started.

#### **Changing a Password**

Before pressing the **Login** button you may also change your current password by clicking the **Change Password** button. The program will guide you through the process of changing the password for your user account.

### 7.15.1.4 Reports

#### **User and Role Rights**

Overview about all user rights assigned to selected role compared to role rights. A review (current assignment) can be saved. History overview per user available.

#### **User and Role Rights (Excel)**

There is a new report regarding the user rights.  
The data will be immediately loaded into an Excel format.  
The rights are structured as a tree and the first line has been fixed.  
The data can be easily exported to EXCEL via "Share".

#### **Role Rights Overview**

Shows all rights in system and if right is assigned to selected role.

#### **Rights Overview**

On the left site all available rights will be displayed, on the right site the user having the selected right assigned.

#### **Assign Right(s) to Users/Roles**

Assign selected right(s) to selected user(s)/roles(s).

#### **Review Overview**

## Assign Password Change Requirements to Roles

## Assign Password Change Requirements to Users

## Check Password Change Requirements

### 7.15.1.5 Password Policy

#### Password Policy

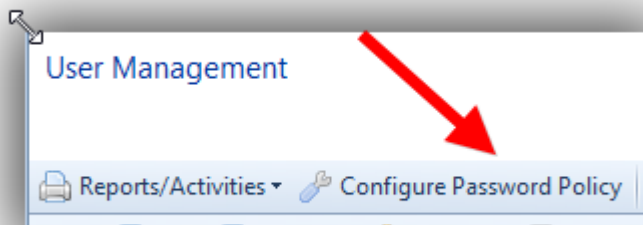
You have the option to configure the password requirements in the system.

The system checks the following variants:

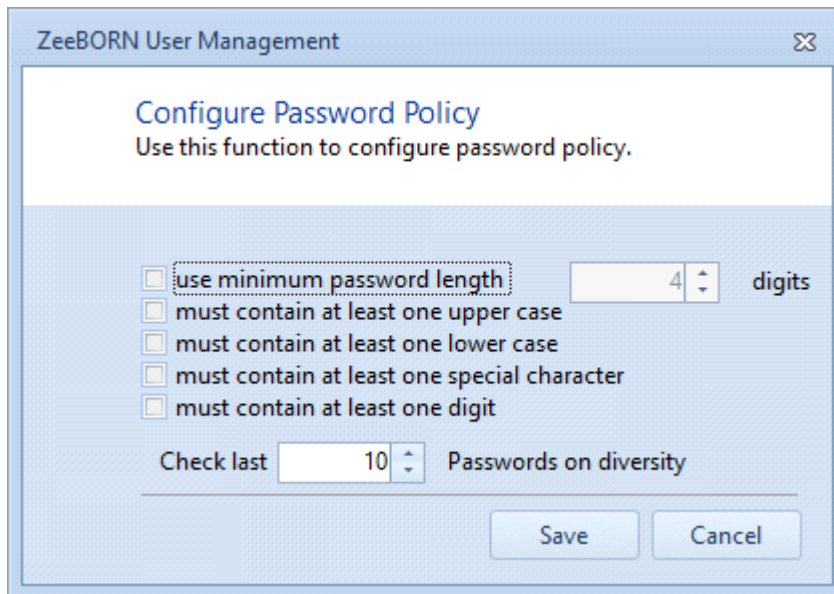
- the minimum password length
- Password should contain uppercase letters
- Password should contain lowercase letters
- Password should contain digit
- Password should contain special characters ( , . / ! @ # \$ % ^ & \* " ' ; \_ ( ) : | [ ] )

These can be varied at any time according to requirements.

In the User Management, there is the button „Configure Password Policy“. Use this button to define Password Policy.







Furthermore, you can define here how many passwords should be checked for equality. The minimum is here 1 (this means that the actual password does not conform to the new one), currently the maximum is 10. A password history will be enabled.

Following user's right is needed:

*Administration -> User Management -> Configure Password Policy*

## Password Change

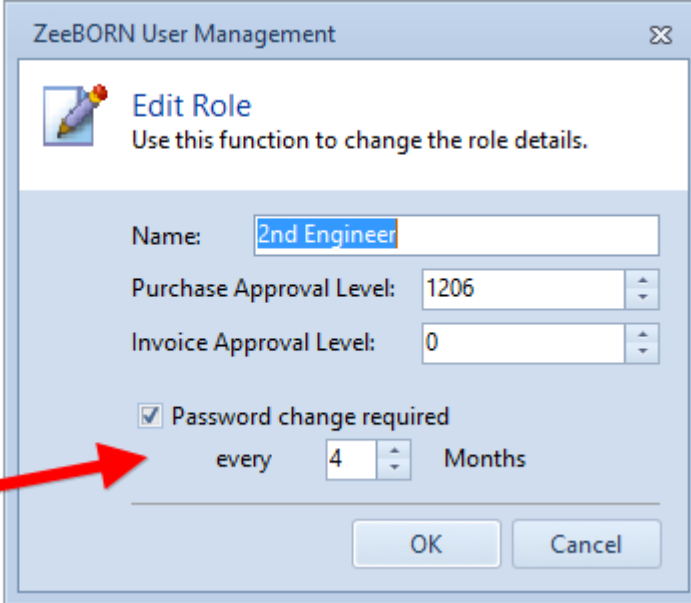
### Requirements Per Role

The system will contain roles with different settings i.e. some roles need a password change every x months and other roles do not need the password change in the same period. We have therefore provided the possibility in the system how often the password has to be changed per role.


This can be done either per role or per report for all activated roles.

#### By single Role

Hit button „Edit Role“ to set the requirement pro role and use this function to change customization here.



ZeeBORN User Management

 **Edit Role**  
Use this function to change the role details.

Name:

Purchase Approval Level:

Invoice Approval Level:

Password change required  
every  Months

**By Report**

To making adjustments for all roles at the same time hit button „Assign Password Change Requirements to Roles“ which you find under Reports. Here you can edit all adjustments for required roles:

ZeeBORN User Management

Save Cancel

Drag a column header here to group by that column

Name	Password Change Requ	Password Change Months
Accounting	<input checked="" type="checkbox"/>	12
Invoice Registrator	<input checked="" type="checkbox"/>	12
(not assigned)	<input type="checkbox"/>	0
Purchasing	<input checked="" type="checkbox"/>	5
Superintendent	<input type="checkbox"/>	0
Managing Director	<input type="checkbox"/>	0
Chief Engineer	<input type="checkbox"/>	0
Fleet Manager	<input checked="" type="checkbox"/>	2
Master	<input type="checkbox"/>	0
2nd Engineer	<input checked="" type="checkbox"/>	4
Chief Officer	<input type="checkbox"/>	0
Gas Engineer	<input type="checkbox"/>	0
Electrical Engineer	<input type="checkbox"/>	0
2nd Officer	<input checked="" type="checkbox"/>	1
3rd Officer	<input type="checkbox"/>	0
3rd Engineer	<input type="checkbox"/>	0
4th Engineer	<input type="checkbox"/>	0
Zeeborn Engineer	<input type="checkbox"/>	0
Commercial	<input type="checkbox"/>	0
hzhhh	<input type="checkbox"/>	0
Zeeborn Assistant	<input type="checkbox"/>	0

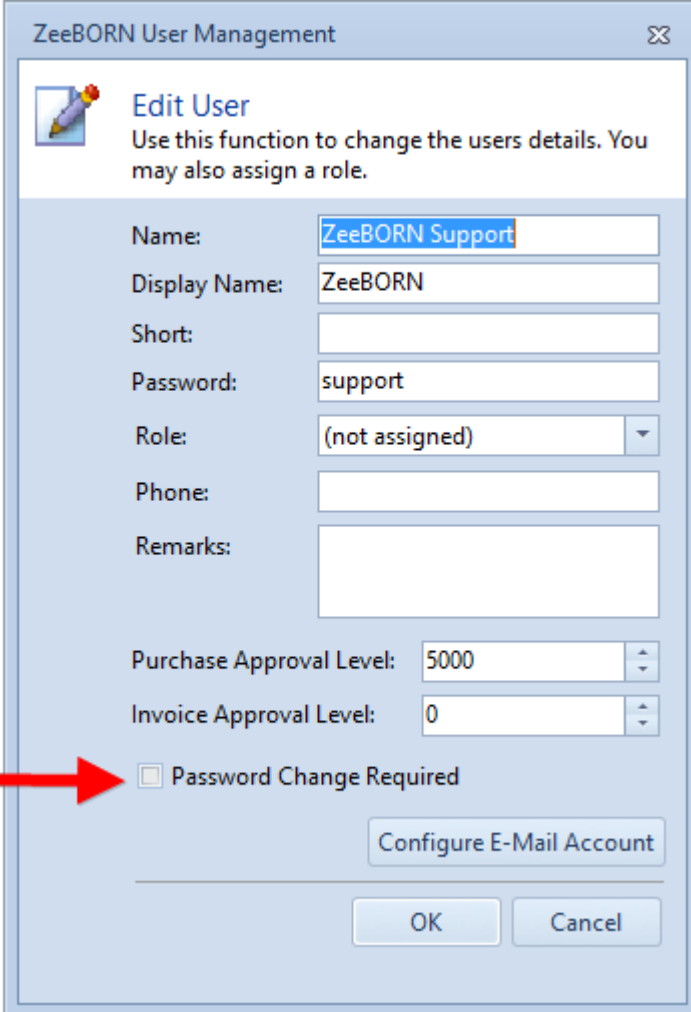
**Requirement per User**

When a new user was created or if there are any other reasons which are necessary to change the password, so you have two options to assign this requirement:


- Directly at the user
- Per report on all activated users

**Directly at the User**

In the form „Edit User“ you have to click the check box „Password Change Required“ for require a new password for this user.



**ZeeBORN User Management** ✕

 **Edit User**  
Use this function to change the users details. You may also assign a role.

Name:

Display Name:

Short:

Password:

Role:  ▾

Phone:

Remarks:

Purchase Approval Level:  ▾

Invoice Approval Level:  ▾

Password Change Required

**Attention:** If the check box is clicked and the user has not the right to change the password, a warning message appears.

#### Per Report on all activated Users

To making adjustments for all activated users at the same time hit button „Assign Password Change Requirements to Users“ which you find under Reports. Here you can edit all adjustments for required users:

ZeeBORN Overview

Save Cancel

Drag a column header here to group by that column

Name	Password	Password Change Requ
Quast,Andreas	admin	<input type="checkbox"/>
Schwieger,Andreas	admin	<input type="checkbox"/>
Vogt,Armin	admin	<input type="checkbox"/>
Kindler,Austin	admin	<input type="checkbox"/>
Schirra,Bernd	admin	<input type="checkbox"/>
Kuschel,Björn	admin	<input type="checkbox"/>
Walker,Carter	admin	<input type="checkbox"/>
Arngrim,Donald	admin	<input type="checkbox"/>
Gilmore,Hill	admin	<input type="checkbox"/>
Ziegler-Vladarski,Karsten	admin	<input type="checkbox"/>
Keatley,Liam	admin	<input type="checkbox"/>
Wolpert,Andrea	admin	<input type="checkbox"/>
Conway,Carter	admin	<input type="checkbox"/>
Assel,Kai	admin	<input type="checkbox"/>
Baganz,Norman	admin	<input type="checkbox"/>
Grauer,Wolfgang	admin	<input type="checkbox"/>
Palmer,Zachary	admin	<input type="checkbox"/>
Bonner,Warrick	admin	<input type="checkbox"/>
Gulberg,Rene	admin	<input type="checkbox"/>
Van Deutekom,Lena	admin	<input type="checkbox"/>
Cadion,Cris Michael	admin	<input type="checkbox"/>
Carpio,Donato	admin	<input type="checkbox"/>
Cox,Luca	admin	<input type="checkbox"/>
Williams,Olivier	admin	<input type="checkbox"/>
Fry,Peter	admin	<input type="checkbox"/>
O'Harea,John	admin	<input type="checkbox"/>

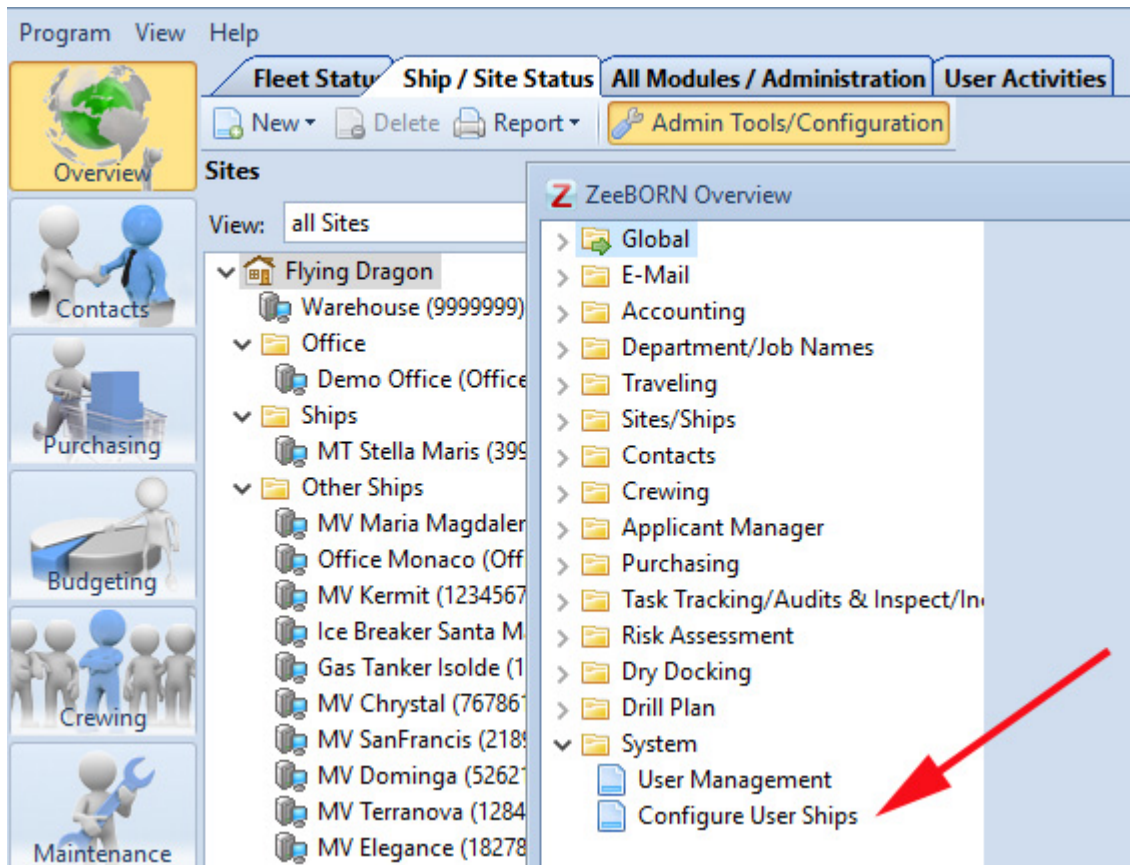
For all above adaption listed in paragraph 2 the user right „Add, edit or delete users/Roles“ is required which you find under Administration -> User Management.

### 7.15.2 Configure User Ships

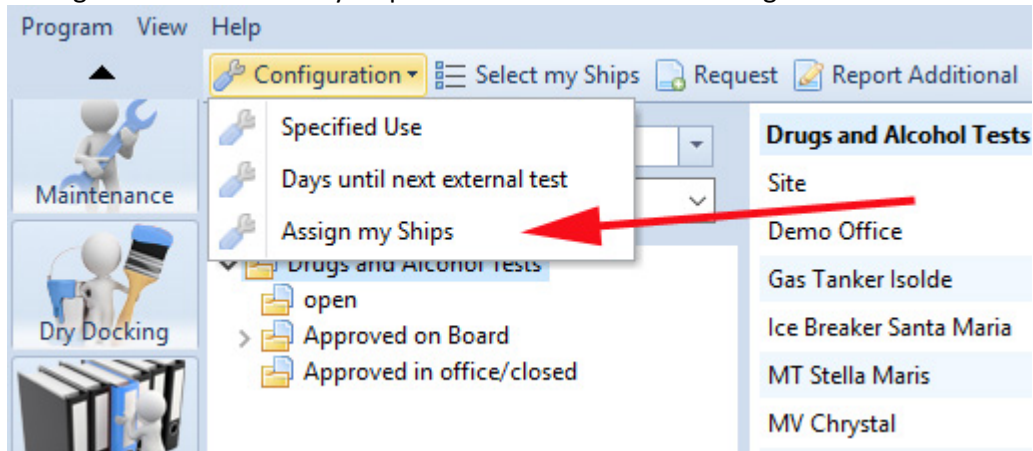
For an easier work with our system, we have the function “select my ships”. With one click all needed ships are selected.

#### Configuration

In TAB “Admin Tools/Configuration” is the configuration for “Select my Ships”. In the tree you find the configuration in part “System”.



Configuration of “Select my ships” is also available in all configurations of the modules.



Use “edit” to choose all needed ships. With save all changes will be taken over. Hit “cancel” and all changes will be ignored.

## 8 Office Manager












The Office Manager module gives you centralized access to all contacts managed in the ZeeBORN system. You may find similar functions for managing contact details in the Purchasing module, Crewing module or in other modules using contact data, but finally the functions made available there represent always a subset of contact management features from the Office Manager module.

All other modules of the ZeeBORN system will provide a reference to the Office Manager when it comes to the management of contact details and the usage of contact related features.

### 8.1 Configuration

The Office Manager Configuration feature allows the management of office management related basic data like contact categories, address types and correspondence languages. Please note that some entries in the configuration module are blocked against modification or deletion. These are so called system entries that are used internally by the ZeeBORN system.

[Configuration Office Manager](#) 

Function	Description
<a href="#">Category</a> 	Manage contact categories e.g. supplier, crew member, agents etc.
<a href="#">Correspondence Language</a> 	Manage active correspondence language.
<a href="#">Address Types</a> 	Manage address types used in system, e.g. home address, business address.
<a href="#">Comment Types</a> 	Manage comment types.
<a href="#">Transportation Types</a> 	Manage contacts transportation types.
<a href="#">Required Fields</a> 	Manage contact details required fields e.g. lastname etc.
<a href="#">E-Mail Template Categories</a> 	Manage E-Mail templates categories.
E-Mail Templates	Manage E-Mail Templates.
<a href="#">Event Types</a> 	Manage Event Types for activities.
<a href="#">Event Results</a> 	Manage Event Results for activities.
<a href="#">Activity Categories</a> 	Manage Activity Categories.
Activity Templates	Manage Activity Templates.
<a href="#">Rating Types</a> 	Manage Rating Types for contact rating.

## 8.2 Managing Contacts

This chapter describes the general principles behind the management of contact data in the system. As most of these principles also apply to specific contact details like crew data, supplier details etc. all modules with contact management feature will refer to this chapter.

### 8.2.1 Addresses

Each contact in the system can have more than one address. A typical example is having a business address and private address for a single person. The ZeeBORN system comes with pre-defined address categories you can use for collecting address data.

If you collect more than one address for a contact you can define a default address. This default address will be used as the preferred address in printouts and reports and while assigning contact data to a document (e.g. assigning a supplier to an purchase order document).

### 8.2.2 E-Mail Addresses, Phone Number, Fax Numbers ...

For each contact record you can collect an unlimited number of communication details like e-mail addresses and phone numbers. The ZeeBORN system comes with a set of pre-defined list of communication detail types that can be extended on demand. Based on the communication type you assign to an entry the system knows for instance what entries to be used as an e-mail address for creating e-mail messages.

### 8.2.3 Using Categories

All contacts in the system can be organized in categories. The assignment of a contact record to a category can be done manually. In many cases you will also see that contact records will be assigned automatically to a category. This happens for instance while creating a new crew records in the Crewing module or while choosing a contact record as a supplier for a purchase order in the Purchasing module. Some of these automatically assigned categories are so called system categories (like in the given example for a crew member that will be assigned to category "Crew"). Usually these system categories cannot be modified by the user since the categories are also used for the internal assignment of contact data to the single modules in the ZeeBORN system.

## 8.3 Managing Company Contacts And Related Contacts

The ZeeBORN system allows the structured management of contact details. One of these supported structures is the management of contacts within a company. In fact the structure of a company and the contacts within a company is created very simple by creating first a contact that will be flagged as a company record (button **New Company Address**). Later on you can create normal contact records (button **New Contact**) and while entering the contacts details you can also choose one of the available company contact records from the database.



If assign a contact record to a company you will be asked if you want to take over address details and communication details from the company contact record. You can copy all available address and communication details or only a part of the available data. After copying these details from the assigned company contact you can change these data without affecting the original details in the company contact record.

## 8.4 Managing Assistants Contacts

For most of the contact records in the system you can also assign an assistant contact. If you want to use this feature, you will need to create the assistants contact record first before being able to assign this as an assistant to another contact in the database.

## 8.5 Managing Documents

For each contact record in the database you can manage an unlimited amount of documents (to be more precise: document files). With the menu button **Documents** you have access to all the function in the system for managing the documents for a contact.

A document can be any file that is available on your hard disk or in your local area network (e.g. Excel files, PDF files). There is no restriction to the file format of the document file. The only requirement is, that a suitable application is installed on your computer for opening and viewing the document.

When adding a document to a contacts record, you will usually copy this document file to the database without affecting the original file you have selected for import. After adding the document to a contact you may delete the original file - the system will always use the documents copy from the database.

If regularly add documents to a contact record without keeping the original files you can also use the document functions that have been marked with "(Delete Source)". In this case the selected document(s) will be imported to the database and will be deleted immediately from the hard disk after a successful import.

### Using a Scanner for Import

The Office Manager module includes a simplified scanning tool for importing a document via a supported scanner. You just choose the scanner you want to use (if more than one scanner is available), you choose if the document is to be scanned as b/w or color image and finally you choose if the document consists of more than one page. All other setting like scanning resolutions and other related parameters will be automatically set by the integrated scanning module.

In some cases you might have documents that will need more fine-tuning during the scanning process (e.g. old fax copies or other hard to read documents). For these cases we recommend using the software that you have received together with your scanner. Scan the document to a file and later on you can use the file import functions for adding the document to the contact record.

## 8.6 E-Mails: Sending, Management

You can create and send e-mails directly from a selected contact record. With the function **E-Mails** you have access to all functions for sending e-mails and for viewing e-mails that have been sent or received before.

The ZeeBORN system provides an integrated e-mail client but also supports your existing e-mail client as long as this supports the MAPI standard. The availability of the integrated e-mail client depends on your license.

While using a MAPI compliant e-mail client like Microsoft Outlook, Thunderbird or similar, the system will only store the e-mail text to the database as it has been created by the system and has been transmitted to the MAPI e-mail client. The system will not be able to detect if the e-mail content has been changed before sending it. The full tracking of e-mail content is only available with the integrated e-mail client.

Further information about the integrated e-mail client can be found at [MiniMail](#)<sup>233</sup>.

## 9 Budgeting

---

The ZeeBORN Budgeting module is the central module for managing and checking your budgets. The module could be used as a standalone application but the preferred use is the implementation of the module into an existing system via the interfaces coming with the module.

The interfaces of the Budgeting allow the gathering of data from other applications but also enables other applications to send their relevant data to the Budgeting. All relevant ZeeBORN applications will send their budget related data to the budget module.

Further interfaces can be developed on demand.

### 9.1 Transactions

In most cases you won't use the Fleet Management as a standalone module. Normally the Fleet Management module will receive the necessary information via the interfaces provided with the module. That means: ZeeBORN applications will take care automatically for providing budget relevant information automatically. But 3rd party applications may require the manual import of budget relevant data (see related documentation).

#### Main Window

The main window shows all single budget records by default grouped by sites (ships, offices, agencies etc.). You may use the configuration features of the data grid for defining other presentations of the data (you might know this feature from other applications like Microsoft Outlook). A click with the right mouse button on the column headers of the grid will show you the options available for changing the way how the data are shown.

Depending on your needs you may in addition provide extra data to the Fleet Management. Beside the data already received from other applications you can add additional booking records to the database.

Bookings can be exported to excel. A search function is available.

#### Manual Booking

If you want to add a budget record or you want to modify an existing record you will have to choose the **Transactions** tab sheet in the main window. Click the button **New** if you want to add a new record or click the button **Edit** for modifying an existing, manually record. The availability of these functions depends on the access rights assigned to your user account.

In the details view you will have to choose the site, a booking date and a account first. Enter a title to be shown in the budget overviews and the relevant cost values. Entering a description is optional. All entries will be entered in your main currency of your company. Foreign currency values received from external applications will be automatically converted to your main currency.

## 9.2 Overview

Provides a quick overview of the individual sites with their respective cost accounts, limits, and the sum of the allocated booking.

### 9.2.1 Pivot Grid

If you want to check the current status of your budgets, use the tab **Pivot Grid** in the main window to see a list of all accounts with their limits and accumulated booking entries and resulting remaining budget. As the preparation of this list may take some time you will have to click the button load for selecting the desired report and for starting the evaluation of the available data.

if you click the button **Show Chart**, the lower part of the results screen shows than the status of your accounts as a chart. The size of the data grid and the chart can be adjusted by moving the splitter control available between the list and the chart.

## 10 Purchasing

The ZeeBORN Purchasing module is the main module for managing requisitions and purchase orders.

### 10.1 Overview Configuration

Function	Description
<a href="#">Manage Suppliers</a>  74	Add, edit purchase contacts (suppliers e.g.).
<a href="#">Accounts -&gt; Cost Departments</a>  35	Manage cost departments.
<a href="#">Accounts -&gt; Cost Categories</a>  35	Manage cost categories.
<a href="#">Accounts -&gt; Cost Accounts</a>  35	Manage cost accounts.
<a href="#">Accounts -&gt; Cost Transfer Account</a>  36	Manage cost transfer account (if used).
<a href="#">Accounts -&gt; Budget Periods</a>  36	Manage budget periods.
<a href="#">Accounts -&gt; Cost Center</a>  36	Manage cost centers. Cost centers are for collecting special costs through different cost accounts.
<a href="#">Accounts -&gt; Assign Accounts to Site</a>  37	Assign used accounts to selected ship.
<a href="#">Currencies</a>  34	Manage active currencies.
<a href="#">Transportation Types</a>  49	Manage transportation details types.
<a href="#">Manage Ports</a>  40	Manage active ports.
<a href="#">Additional Cost Types</a>  49	Manage additional cost types.
<a href="#">Manage Units</a>  74	Manage units.
<a href="#">Assign my Ships</a>  74	Select ships you are responsible for.
<a href="#">General</a>  50	Manage mail texts for sending per mail.

### 10.2 Requisitions

The Requisition-Center is used for generating and approving new requisitions.

#### 10.2.1 Creating/Editing Requisitions

Creating requisitions can be done via:

1. Clicking button "New Requisition"
2. Distributing from existing requisition, request for quotation or purchase order

3. Copying from standing order -> Create new requisition by copying an existing and as standing order marked documents (RQ, RfQ, PO).

Creating agency requests can be done via:

1. Clicking button "New Agency Request"
2. Distributing from existing agency request, request for quotation of an agency request or purchase order of an agency request
3. Copying from standing order -> Create new agency request by copying an existing and as standing order marked documents (RQ-A, RfQ-A, PO-A).

Creating forward order can be done via:

1. Clicking button "New Forward Order"
2. Distributing from existing requisition, request for quotation or purchase order
3. Copying from standing order -> Create new requisition by copying an existing and as standing order marked documents (RQ-FW, RfQ-FW, PO-FW).

Creating service order (Office) can be done via:

1. Clicking button "New Service Order (Office)"
2. Distributing from existing service order, request for quotation of service order or purchase order
3. Copying from standing order -> Create new requisition by copying an existing and as standing order marked documents (SQ, SRfQ, SO).

**NOTE: We have two different service orders:**

1. **Service Orders linked to module "Maintenance"**
2. **Service Order created in Purchase with free jobs or catalog jobs and no linking to module "Maintenance"**

## General

Title: must be different from default "(new)".

[Cost Department and Cost account](#)<sup>[35]</sup> are mandatory fields and must be filled in before assigning items.

The field 'Internal Remark' serves as communication platform between ship and office and shall be used to explain e.g. reason of ordering.

External remarks are visible in all screens and printouts. This field shall be used for any information which you consider helpful for the suppliers.

Delivery Date: planned date for receiving items.

Booking Date: Date for booking requisition/purchase order into [budget](#)<sup>[78]</sup> (can be empty, then purchase order sent date is booking date).

The field 'Assigned User' can be used in case a responsibility for this RQ shall be defined. It is only an information field between ship and office. If the check box 'Hold' is marked, this is advising you that no activities are planned for the next time.

Supplier-/Delivery Address can be inserted in each requisition. The Invoice Address is set per default.

## Prices

You can administrate several prices for items and requisition.

*Estimated price:*

Estimated price is available for several items and for the whole requisition. Estimated prices are for internal use only. If "use estimated price" is checked this price will be stored in budget in case of sending purchase order.

*Manual price:*

Manual price is available only for requisition/purchase order, not for items.

*Item Prices:*

Known prices for items, system will calculating total for requisition using discounts.

Note: Use estimated price is only possible, if "for all items" is checked.

## Items

The requisition has to be filled by clicking on 'New Item' and choosing from the following:

- free line item
- get spare part from [location](#)<sup>194</sup>
- get spare part from [component](#)<sup>186</sup>
- get [component](#)<sup>181</sup>
- get article from [catalog](#)<sup>197</sup>

Please use the external remark field of the item in case you want to add relevant information for the office or the supplier.

Once a requisition is created, you find it under the folder 'open'. In this status any information is still editable. When ordering from Component or Stock, articles can either be added to an existing requisition (this applies to all RQs which are open on board) or inserted into a new one.

Requisition has to be approved before further processing. If ship has created the requisition, it will be appear in the office as OoB (open on board) and can not be edited in the office until ship has approved.

## Budget

In the Purchasing Module you will see a budget ball on the upper right corner of the screen. This feature shall serve as information.

The color (green/orange/red) is indicating the present status of the budget for current ship based on the limits assigned per cost account.

## Further Processing

After approving requisition you can either create:





- a [request for quotation](#) <sup>90</sup> (RfQ) to several suppliers (as PDF or in a special interactive [ZeeBORN Format zbDoc](#) <sup>362</sup>) or
- directly a [purchase order](#) <sup>97</sup>. In case of creation purchase order a supplier is mandatory.

There is the possibility to approve and create RfQs for multiple RQs. Use button "Assign Supplier to several RQs" under "Actions". There you have to select several RQs, assign supplier and than hit button "Approve and create RfQ".

## 10.2.2 Overview open Requisitions

Function	Description	Further Information
OoB	Open on board	
Show Details	Only available in office for open on board requisitions (OoB). Show details overview as read only – no editing allowed.	
Edit	Edit details. Not available for OoB RQs in the office.	<a href="#">Edit RQ Details</a> <sup>80</sup>
Split	Split selected items to new sub requisition.	
Switch Items	Only available for RQ (not for SQ). Switch selected items to existing requisition for same site. You can either copy or move items.	
Reject	Reject requisition. Requisition will remain in system.	
Delete	Delete requisition. Please note: Requisition and all relevant documents (attachments, history, eventually created purchase orders etc.) will be deleted completely from system and will no longer be available.	
Approve	Approve requisition. Requisition slides from folder "open" to folder "approved". Only approved requisitions can be finished.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too).	









Function	Description	Further Information
	The history is divided into several tabs for a better overview.	
Attachments -> Attach	Add documents to requisition. Attached documents will be sent to the supplier along with the requisition and stay in the system.	<a href="#">Add Documents</a> 
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> 
Distribute	Only available for RQs (currently). Allows to copy requisition to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Set as Standing Order	Set the requisition to the standing order list. Mark requisition as template.	<a href="#">Copy from standing order</a> 
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments..	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Send	Send official report as pdf to printer, per mail or to queue. Information will be stored in history.	<a href="#">Queue</a> 
Add Remark to History	Add remark manual to history of selected document.	
Link to Dry Dock Job Card	You can link requisition to selected dry dock job card. Requisition will remain in open status – only a link between job card and requisition will be stored. Link information is available in requisitions HTML overview.	
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and requisition.	
Rearrange Position	After assigning new items you can click “rearrange position” – the order of the items will be redefined depending of the assigned components.	
Get valid TAN	Only visible, if system detects invalid TAN.	
Follow up / Pin to User Activities -> Follow up	Follow up for RQ can be given.	

Function	Description	Further Information
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RQ can be deleted.	
Hold		
Get Stock Article Changes	All changes from Stock will be overtaken in RQ.	

### 10.2.3 Overview approved Requisitions

Function	Description	Further Information
Edit	Edit details.	<a href="#">Edit RQ Details</a> <sup>80</sup>
Split	Split selected items to new sub requisition.	
Switch Items	Only available for RQ (not for SQ). Switch selected items to existing requisition for same site. You can either copy or move items.	
Reject	Reject requisition. Requisition will remain in system.	
Delete	Delete requisition. Please note: Requisition and all relevant documents (attachments, history, eventually created purchase orders etc.) will be deleted completely from system and will no longer be available.	
Undo Approve	Undo approve requisition. Requisition slides from folder "approved" to folder "open". If requisition was created on board, new status is "approved on board", otherwise new status is "open".	
Create -> Request for Quotations	Select one or more suppliers and create Requests for quotations. Please note: if supplier is already assigned to approved requisitions this supplier will be preselected for creation process.	<a href="#">Request for Quotations</a> <sup>90</sup>
Create -> Purchase Order	You can create a purchase order – either with already assigned supplier or you have to select supplier for purchase order.	<a href="#">Purchase Order</a> <sup>97</sup>

Function	Description	Further Information
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Attachments -> Attach	Add documents to requisition.	<a href="#">Add Documents</a> 
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> 
Distribute	Only available for RQs (currently). Allows to copy requisition to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Set as standing order	Set the requisition to the standing order list.	<a href="#">Copy from standing order</a> 
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Send	Send official report as pdf to printer, per mail or to queue. Information will be stored in history.	<a href="#">Queue</a> 
Add Remark to History	Add remark manual to history of selected document.	
Internal Remark -> Add Internal Remark	Quick adding of an internal remark without using Button "Edit".	<a href="#">Edit RQ Details</a> 
Internal Remark -> Edit Internal Remark	Quick access to already added internal remark without using Button "Edit".	<a href="#">Edit RQ Details</a> 
Link to Dry Dock Job Card	You can link requisition to selected dry dock job card. Requisition will remain in open status – only a link between job card and requisition will be stored. Link information is available in requisitions HTML overview.	

Function	Description	Further Information
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and requisition.	
Rearrange Position	After assigning new items you can click "rearrange position" – the order of the items will be redefined depending of the assigned components.	
Follow up / Pin to User Activities -> Follow up	Follow up for RQ can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RQ can be deleted.	
Get Stock Article Changes	All changes from Stock will be overtaken in RQ.	


#### 10.2.4 Overview closed Requisitions

Function	Description	Further Information
Show Details	Show details overview as read only – no editing allowed.	
Copy Items	Only available for RQ (not for SQ). Copy selected items to existing requisition.	
Delete	Delete requisition. Please note: Requisition and all relevant documents (attachments, history, eventually created purchase orders etc.) will be deleted completely from system and will no longer be available.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Show Attachments	Show available documents. No deleting possible.	
Distribute	Only available for RQs (currently). Allows to copy requisition to other/same ship. If no equivalent	

Function	Description	Further Information
	spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Set as Standing Order	Set the requisition to the standing order list.	<a href="#">Copy from standing order</a> <sup>122</sup>
Create data transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Add Remark to History	Add remark manual to history of selected document.	
Internal Remark -> Add Internal Remark	Quick adding of an internal remark.	
Internal Remark -> Edit Internal Remark	Quick access to already added internal remark.	
Follow up / Pin to User Activities -> Follow up	Follow up for RQ can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RQ can be deleted.	

### 10.2.5 Overview rejected Requisitions

Function	Description	Further Information
Show Details	Show details overview as read only – no editing allowed.	
Copy Items	Only available for RQ (not for SQ). Copy selected items to existing requisition.	
Delete	Delete requisition. Please note: Requisition and all relevant documents (attachments, history, eventually created purchase orders etc.) will be deleted completely from system and will no longer be available.	

Function	Description	Further Information
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Show Attachments	Show available documents. No deleting possible.	
Distribute		
Set as Standing Order	Set the requisition to the standing order list.	<a href="#">Copy from standing order</a> 
Create data transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create data transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Add Remark to History	Add remark manual to history of selected document.	
Internal Remark -> Add Internal Remark	Quick adding of an internal remark.	
Internal Remark -> Edit Internal Remark	Quick access to already added internal remark.	
Undo Reject	Undo reject requisition. Requisition slides from folder "rejected" to folder "open". If requisition was created on board, new status is "approved on board", otherwise new status is "open".	
Get valid TAN	Only visible, if system detects invalid TAN.	
Follow up / Pin to User Activities -> Follow up	Follow up for RQ can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RQ can be deleted.	

## 10.3 Request for Quotation

Quotation-Center is used for collecting and comparing quotations from several suppliers.

Quotation can be entered into system on two several ways.

1. In case you've sent the quotation in [zbDoc-Format](#)<sup>[362]</sup> you are able to import the quotation into the system.
2. Otherwise you can enter information manually.

If one or several quotations are filled in you can either compare the quotations and select the suitable supplier(s) or you can use one supplier for the whole quotation and create purchase order directly.

In case of comparing and assigning supplier(s) the quotation will be stored under "Supplier assigned".

If you selected more than one supplier and create purchase orders, one or more sub purchase orders will be created in addition to the general purchase order.

### 10.3.1 Send RfQ again after receiving quotations from suppliers

If you send a Request for Quotation again, the system now will copy previously entered values (price, discount, remarks and quotation number) from the old quotation to the new created one. The old quotation will be set to inactive and will no longer appear in the tree.

The status of the quotation will be set back to "new".

We don't update the total prices and the offered quantity in the new quotation if the quantity of an item was changed. The original quotation data remain unchanged even if there is a change of quantities in the updated requests for quotation (e.g. if the previous RfQ version requested a quotation for 2 units, received an offer for 2 units but the RfQ will be updated to 3 units; the offer still shows the prices for 2 units; as originally offered by the supplier). It should always be clear that already existing data in supplier's quotations may still show values related to a previous version of an RfQ that might have requested different quantities.

### 10.3.2 Overview open RfQs

Function	Description	Further Information
Edit	Edit details. After editing you can send RfQs again to suppliers. Quotations will be updated.	<a href="#">Edit Details</a> <sup>[80]</sup>
Attachments -> Attach	Add documents to requisition.	<a href="#">Add Documents</a> <sup>[20]</sup>
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> <sup>[20]</sup>

Function	Description	Further Information
Set as closed	Set status of RfQ as closed without any further actions – no purchase order will be created.	
Reject	Reject request for requisition. RfQ will remain in system in folder “rejected”.	
Delete	Delete request for quotation. Please note: RfQ and all relevant documents (attachments, history, eventually created purchase orders, requisition etc.) will be deleted completely from system and will no longer be available.	
Select Suppliers	Gives an overview about all Quotations you already received from supplier. A default supplier can be assigned – all items will be marked as selected for this supplier. You can select supplier for each item. You can select more than one supplier -> in this case purchase order will be split. After selection the RfQ slides from Folder “open” to “supplier assigned”.	
Send to Excel	Send supplier overview (select supplier) to excel.	
Clear Selection	Deletes an existing selection.	
Add Supplier	Add new supplier to RfQ. A new quotation will be send to selected supplier.	
Distribute	Only available for RfQs (currently). Allows to copy RfQ to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Add Remark to History	Add remark manual to history of selected document.	
Link to Dry Dock Job Card	You can link RfQ to selected dry dock job card. RfQ will remain in open status – only a link between job card and RfQ will be stored. Link information is available in RfQ html overview.	
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and RfQ.	






Function	Description	Further Information
Follow up / Pin to User Activities -> Follow up	Follow up for RfQ can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RfQ can be deleted.	

### 10.3.2.1 Overview Quotations - open RfQs

Function	Description
Edit Quotation	Edit quotation details. You may enter prices, quotation number, delivery date and remarks from supplier.
Delete	Delete selected quotation only.
Send RfQ again	Possibility to send quotation again.
Create Purchase Order	Create purchase order with quotations supplier. Former suppliers selection will be deleted.
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.

### 10.3.3 Overview RfQs with Supplier assigned

Function	Description	Further Information
Edit	Edit details. After editing you can send RfQs again to suppliers. Quotations will be updated.	<a href="#">Edit Details</a> 
Attachments -> Attach	Add documents to requisition.	<a href="#">Add Documents</a> 
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> 
Set as Closed	Set status of RfQ as closed without any further actions – no purchase order will be created.	
Reject	Reject request for requisition. RfQ will remain in system in folder “rejected”.	

Function	Description	Further Information
Delete	Delete request for quotation. Please note: RfQ and all relevant documents (attachments, history, eventually created purchase orders, requisition etc.) will be deleted completely from system and will no longer be available.	
Select Suppliers	Gives an overview about all Quotations you already received from supplier. A default supplier can be assigned – all items will be marked as selected for this supplier. You can select supplier for each item. You can select more than one supplier -> in this case purchase order will be split.	
Send to Excel	Send supplier overview (select supplier) to excel.	
Clear Selection	Deletes an existing selection.	
Add Supplier	Add new supplier to RfQ. A new quotation will be send to selected supplier.	
Distribute	Only available for RfQs (currently). Allows to copy RfQ to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Create Purchase Order		
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Add Remark to History	Add remark manual to history of selected document.	
Link to Dry Dock Job Card	You can link RfQ to selected dry dock job card. RfQ will remain in open status – only a link between job card and RfQ will be stored. Link information is available in RfQ HTML overview.	
Remove Link to Dry Dock Job Card		
Follow up / Pin to User Activities -> Follow up	Follow up for RfQ can be given.	

Function	Description	Further Information
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RfQ can be deleted.	

### 10.3.3.1 Overview Quotations - RfQs with Supplier assigned

Function	Description
Edit Quotation	Edit quotation details. You may enter prices, quotation number, delivery date and remarks from supplier.
Delete	Delete selected quotation only.
Send RfQ again	Possibility to send quotation again.
Create Purchase Order	Create purchase order with quotations supplier. Former suppliers selection will be deleted.
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.

### 10.3.4 Overview closed RfQs

Function	Description
Show Details	Show details overview as read only – no editing allowed.
Show Attachments	Show available documents. No deleting possible.
Delete	Delete request for quotation. Please note: RfQ and all relevant documents (attachments, history, eventually created purchase orders, requisition etc.) will be deleted completely from system and will no longer be available.
Distribute	Only available for RfQs (currently). Allows to copy RfQ to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.

Function	Description
Add Remark to History	Add remark manual to history of selected document.
Internal Remark - > Add Internal Remark	Quick adding of an internal remark.
Internal Remark - > Edit Internal Remark	Quick access to already added internal remark.
Follow up / Pin to User Activities -> Follow up	Follow up for RfQ can be given.
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RfQ can be deleted.

#### 10.3.4.1 Overview Quotations - closed RfQs

Function	Description
Show Details	Show details overview as read only - no editing allowed.
Show Attachments	Show available documents. No deleting possible.
Delete	Delete request for quotation. Please note: RfQ and all relevant documents (attachments, history, eventually created purchase orders, requisition etc.) will be deleted completely from system and will no longer be available.
Distribute	Only available for RfQs (currently). Allows to copy RfQ to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.
Add Remark to History	Add remark manual to history of selected document.

#### 10.3.5 Overview rejected RfQs

Function	Description
Show Details	Show details overview as read only – no editing allowed.

Function	Description
Show Attachments	Show available documents. No deleting possible.
Delete	Delete request for quotation. Please note: RfQ and all relevant documents (attachments, history, eventually created purchase orders, requisition etc.) will be deleted completely from system and will no longer be available.
Undo Reject	Undo reject RfQ. RfQ slides from folder "rejected" to folder "open".
Distribute	Only available for RfQs (currently). Allows to copy RfQ to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.
Add Remark to History	Add remark manual to history of selected document.
Internal Remark -> Add Internal Remark	Quick adding of an internal remark.
Internal Remark -> Edit Internal Remark	Quick access to already added internal remark.
Follow up / Pin to User Activities -> Follow up	Follow up for RfQ can be given.
Follow up / Pin to User Activities -> Clear Follow up	Follow up for RfQ can be deleted.


### 10.3.5.1 Overview Quotations - rejected RfQs






Function	Description
Delete	Delete selected quotation only.
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.

## 10.4 Purchase Orders

Purchase Order-Center is used for handling purchase orders including receiving and invoicing.


### 10.4.1 Overview on hold Purchase Orders

Function	Description	Further Information
Edit PO	Edit details.	<a href="#">Edit Details</a> 
Show	Show official report.	
Update Quotation Number	An update of quotation number can be given.	
Approve	Only available if company decides to have a "approved" folder. Approve purchase order. Any approval level will be checked. PO slides from "open" folder to "approved" folder.	
Approve & Send	Only available if company decides to have no "approved" folder. Approving and sending PO to supplier in one step.	
Back to RQ	As long as PO has not been edited and no RfQ is available you can undo creation of PO. Related RQ will be set as "approved" and will slide from "closed" folder back to "approved" folder. PO will be deleted.	
Back to RfQ	As long as PO has not been edited and no RfQ is available you can undo creation of PO. Related RfQ will be set as "approved" and will slide from "closed" folder back to "approved" folder. PO will be deleted. A reason for undo has to be given.	
Reject	Reject purchase order. PO will remain in system in folder "rejected".	
Delete	Delete purchase order. Please note: PO and all relevant documents (attachments, history, eventually created RfQs, requisition etc.) will be deleted completely from system and will no longer be available.	
Set as Standing Order	Set the PO to the standing order list.	<a href="#">Copy from standing</a>

Function	Description	Further Information
		<a href="#">order</a> 
Distribute	Only available for POs (currently). Allows to copy PO to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Switch Items to existing RQ	Only available for PO (not for SO). Switch selected items to existing requisition for same site. You can either copy or move items.	<a href="#">Switch Items</a> 
Split PO	Split selected items to new sub purchase order.	
Switch Items to existing PO	Only available for PO (not for SO). Switch selected items to existing purchase order for same site. You can either copy or move items.	<a href="#">Switch Items</a> 
Rate Supplier	You can rate supplier assigned to PO directly from purchase module.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Attachments -> Attach	Add documents to requisition.	<a href="#">Add Documents</a> 
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> 
Add Remark to History	Add remark manual to history of selected document.	
Follow up / Pin to User Activities -> Follow up	Follow up for PO can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for PO can be deleted.	

Function	Description	Further Information
Rearrange Position	Position number of spare parts will be changed to numbering in sort order.	
Change latest send date	Latest send date can be changed.	
Check POs for merging	Check all POs to same supplier for merging.	

#### 10.4.2 Overview open Purchase Orders

Function	Description	Further Information
Edit PO	Edit details.	<a href="#">Edit Details</a> 
Show	Show official report.	
Update Quotation Number	An update of Quotation number can be given.	
Approve	Approve purchase order. Any approval level will be checked. PO slides from "open" folder to "approved" folder.	
Approve & Send	Only available if company decides to have no "approved" folder. Approving and sending PO to supplier in one step.	
Back to RQ	As long as PO has not been edited and no RfQ is available you can undo creation of PO. Related RQ will be set as "approved" and will slide from "closed" folder back to "approved" folder. PO will be deleted.	
Back to RfQ	As long as PO has not been edited and no RfQ is available you can undo creation of PO. Related RfQ will be set as "approved" and will slide from "closed" folder back to "approved" folder. PO will be deleted. A reason for undo has to be given.	
Reject	Reject purchase order. PO will remain in system in folder "rejected".	
Delete	Delete purchase order. Please note: PO and all relevant documents (attachments, history,	





Function	Description	Further Information
	eventually created RfQs, requisition etc.) will be deleted completely from system and will no longer be available.	
Set as Standing Order	Set the PO to the standing order list.	<a href="#">Copy from standing order</a> <sup>[122]</sup>
Distribute	Only available for POs (currently). Allows to copy PO to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Switch Items to existing RQ	Only available for PO (not for SO). Switch selected items to existing requisition for same site. You can either copy or move items.	<a href="#">Switch Items</a> <sup>[116]</sup>
Split PO	Split selected items to new sub purchase order.	
Switch Items to existing PO	Only available for PO (not for SO). Switch selected items to existing purchase order for same site. You can either copy or move items.	<a href="#">Switch Items</a> <sup>[116]</sup>
Rate Supplier	You can rate supplier assigned to PO directly from purchase module.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Attachments -> Attach	Add documents to requisition.	<a href="#">Add Documents</a> <sup>[20]</sup>
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> <sup>[20]</sup>
Add Remark to History	Add remark manual to history of selected document.	
Link to Dry Dock Job Card	You can link requisition to selected dry dock job card. Requisition will remain in open status – only	




Function	Description	Further Information
	a link between job card and requisition will be stored. Link information is available in requisitions HTML overview.	
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and requisition.	
Follow up / Pin to User Activities -> Follow up	Follow up for PO can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for PO can be deleted.	
Rearrange Position		
Hold until sending		
Check POs for merging		

#### 10.4.2.1 Approving Purchase Orders

As long as purchase order isn't approved you are able to editing the purchase order. The approving of POs is depending on several approval levels.

#### 10.4.3 Overview approved Purchase Orders

Function	Description	Further Information
Edit PO	Edit details.	<a href="#">Edit Details</a> 
Show	Show official report without sending.	
Send	Send Purchase Order to supplier. After sending values will be booked into budget.	<a href="#">Send Document</a> 
Reject	Reject purchase order. PO will remain in system in folder "rejected".	
Delete	Delete purchase order. Please note: PO and all relevant documents (attachments, history, eventually created RfQs, requisition etc.) will be deleted completely from system and will no longer be available.	

Set as Standing Order	Set the PO to the standing order list.	<a href="#">Copy from standing order</a> 
Distribute	Only available for POs (currently). Allows to copy PO to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Split PO	Split selected items to new sub purchase order.	
Switch Items to existing PO	Only available for PO (not for SO). Switch selected items to existing purchase order for same site. You can either copy or move items.	
Rate Supplier	You can rate supplier assigned to PO directly from purchase module.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Attachments -> Attach	Add documents to requisition.	<a href="#">Add Documents</a> 
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	<a href="#">Show/Delete Documents</a> 
Add Remark to History	Add remark manual to history of selected document.	
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and PO.	
Link to Dry Dock Job Card	You can link PO to selected dry dock job card. PO will remain in open status – only a link between job card and PO will be stored. Link information is available in PO html overview.	
Follow up / Pin to User Activities -> Follow up	Follow up for PO can be given.	

Follow up / Pin to User Activities -> Clear Follow up	Follow up for PO can be deleted.	
Rearrange Position	Position number of spare parts will be changed to numbering in sort order.	
Check POs for merging	All on hold POs will be checked for merging with other POs.	

#### 10.4.3.1 Send Document

You can either send document

- to printer
- per E-Mail
- to [Queue](#)<sup>[122]</sup>

#### 10.4.4 Overview closed Purchase Orders

Function	Description	Further Information
Show Details	Shows the edit form with read only right.	
Show	Displays the PO as it has been sent to the Supplier	
Delete	Delete purchase order. Please note: PO and all relevant documents (attachments, history, eventually created RfQs, requisition etc.) will be deleted completely from system and will no longer be available.	
Set as standing order	Set the PO to the standing order list.	<a href="#">Copy from standing order</a> <sup>[122]</sup>
Update -> Booking Date	Change booking date. Booking date indicates the date on which the value is booked into budget.	
Update -> Change Cost Account / Department	Change cost account / department after booking PO into budget. Budget will be updated.	
Update -> Prices	Update PO Prices. You can either update manual price (total without reservation), item prices or estimated price (total with reservation). Budget will be updated.	
Update -> Delivery Costs	Update delivery costs. Budget will be updated.	
Update -> Delivery Date	Change expected delivery date.	

Function	Description	Further Information
Update -> Internal Remark -> Add	Quick adding of an internal remark.	
Update -> Internal Remark -> Edit	Quick access to already added internal remark.	
Update -> Convert Free Line Items	If free line items are available in PO you can convert them either to new or to existing spare parts. Stock will be updated with received quantity. If you convert item to existing spare part, PO will be updated with new article information.	
Update -> Update Quotation Number	Update Quotation number after sending PO to supplier.	
<i>Paying</i>	<i>Currently not implemented</i>	
Receiving/Reporting -> Set as completely received / reported	Only the receiving status of a PO will be set as "completely received". Please use carefully. Stock will not be updated. Only available if system detects that receiving status of PO is not completely received.	
Receiving/Reporting -> Set as partially received	The receiving status of a PO will be set as "partially received". Please use carefully. Stock will not be updated. Only available if system detects that receiving status of PO is not partially received. Status of PO will be set as "sent" - you can use this button for reopening closed PO.	
Receiving/Reporting -> Set as not received	The receiving status of a PO will be set as "not received". Please use carefully. Stock will not be updated. Only available if system detects that receiving status of PO is received. Status of PO will be set as "sent" - you can use this button for reopening closed PO.	
Invoicing	Only available if your company use the Invoicing Module.	
Undo: No Invoice expected	Undo "no invoice expected". Invoice can be assigned to PO. Status of PO will be set as "sent" - you can use this button for reopening closed PO.	
Invoicing -> Set Invoice Type	You can change type of assigned invoices (partially, completely). Budget will be updated. Invoicing status will not be updated.	

Function	Description	Further Information
Invoicing -> No Invoice expected	Mark PO invoicing status with "no invoice expected". No invoice can be assigned to this PO. Only available if PO is not marked with "No invoice expected".	
E-Mails	If you sent PO to supplier out of the system all sent emails will be shown here.	
Distribute	Only available for POs (currently). Allows to copy PO to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Copy Items to RQ	Only available for PO (not for SO). Copy selected items to existing requisition for same site. You can either only copy then items.	
Rate Supplier	Add manual rating for supplier.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Show Attachments	Show available documents. No deleting possible.	
Set as Capital Asset	Mark selected items as capital assets.	<a href="#">Capital Asset Report</a> <sup>116</sup>
Add remark to history	Add remark manual to history of selected document.	
Print Article Label	If a dymo printer is assigned you can print article label for selected spare parts.	
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and PO.	
Link to Dry Dock Job Card	You can link PO to selected dry dock job card. PO will remain in open status – only a link between	

Function	Description	Further Information
	job card and PO will be stored. Link information is available in PO HTML overview.	
Cost Center -> Assign Cost Center	Assign Cost Center to PO.	
Cost Center -> Clear Cost Center	Clear Cost Center from PO.	
Follow up / Pin to User Activities -> Follow up	Follow up for PO can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for PO can be deleted.	





#### 10.4.4.1 Overview sent Purchase Orders


Function	Description	Further Information
Show Details	Shows the edit form with read only right.	
Show	Displays the PO as it has been sent to the supplier	
Send PO to XML (Kloska)		
Order Confirmation -> Import Order Confirmation XML (Kloska)		
Order Confirmation -> Add/Edit	A order confirmation can be added or edited. A remark can be added, but you do not have to. Today's date is predefined.	
Order Confirmation -> Delete	The order confirmation can be deleted.	
Delete	Delete purchase order. Please note: PO and all relevant documents (attachments, history, eventually created RfQs, requisition etc.) will be	

Function	Description	Further Information
	deleted completely from system and will no longer be available.	
Cancel PO	Cancel PO. Is not possible, if invoices are already assigned. Cancellation information will be send to supplier. <a href="#">If PO is linked to dry dock job card</a> <sup>113</sup> , link will be removed. Budget will be updated.	
Set as Standing Order	Set the PO to the standing order list.	<a href="#">Copy from standing order</a> <sup>122</sup>
Update -> Update Prices	Update PO Prices. You can either update manual price (total without reservation), item prices or estimated price (total with reservation). Budget will be updated.	
Update -> Update Delivery Costs	Update delivery costs. Budget will be updated.	
Update -> Update Additional Costs	Update additional costs. Budget will be updated.	
Update -> Update Booking Date	Change booking date. Booking date indicates the date on which the value is booked into budget.	
Update -> Update Delivery Date	Change expected delivery date.	
Update -> Internal Remark -> Add Internal Remark	Quick adding of an internal remark.	
Update -> Internal Remark -> Edit Internal Remark	Quick access to already added internal remark.	
Update -> External Remark -> Add External Remark	Quick adding of an external remark.	
Update -> External Remark -> Edit External Remark	Quick access to already added external remark.	
Update -> Change Priority	The Priority can be changed after sending to supplier. If necessary please inform supplier.	



Function	Description	Further Information
Update -> Change Site/Ship	Change Site after sending PO to supplier. Please use carefully. Budget will be updated.	
Update -> Change Cost Account/Department	Change cost account / department after booking PO into budget. Budget will be updated.	
Update -> Change Supplier	Allows you to change supplier without any further action (e.g. Cancellation and new creation). If an invoice already is assigned, changing is not possible. Please use button very carefully and only in exceptional cases.  <b>We highly recommend to cancel PO and create new one with new supplier instead.</b>	
Update -> Change Delivery Address	Change delivery address after sending PO to supplier. If necessary please inform supplier.	
Update -> Change Invoice Address	Change Invoice address after sending PO to supplier. If necessary please inform supplier.	
Update -> Convert Free Line Items	If free line items are available in PO you can convert them either to new or to existing spare parts. Stock will be updated with received quantity. If you convert item to existing spare part, PO will be updated with new article information.	
Update -> Update Quotation Number	Update Quotation number after sending PO to supplier.	
Update -> Update Title	Update title after sending PO to supplier.	
Update -> Add/Edit Item External Remark	Add or edit external item remark after sending PO to supplier.	
Update -> Split PO (Booking Date)	PO can be split for different booking dates. A split PO is marked with X.	
Paying -> Pay Invoice	Attached invoice can be paid in our system.	
Paying -> Paying -> Set as unpaid	PO can be set as unpaid.	

Function	Description	Further Information
Paying -> Paying -> Set as partially paid	PO can be set as partially paid.	
Paying -> Paying -> Set as completely paid	PO can be set as completely paid.	
Receiving/Reporting -> Receive Items	Receive ordered items. Stock will be updated if spare parts are effected. Button only visible for PO (not for SO).	<a href="#">Receive Items</a>  113
Receiving/Reporting -> Report Job	Report job. Maintenance will be updated. Button only visible for SO (not for PO).	
Receiving/Reporting -> Storage & Transportation -> Storage Received in Warehouse	Mark PO as received in selected warehouse - either completely or partially. Warehouse information will be shown in internal remarks.	<a href="#">Warehouse Overview</a>  117
Receiving/Reporting -> Storage & Transportation -> Storage Edit (received in Warehouse)	Edit assigned warehouse information.	<a href="#">Warehouse Overview</a>  117
Receiving/Reporting -> Storage & Transportation -> Storage Delete (Received in Warehouse)	Delete assigned warehouse information.	
Receiving/Reporting -> Storage & Transportation -> Transportation Add Transportation Details	Assign transportation details for selected PO. Transportation information will be shown in internal remarks. You can mark all items as dispatched from warehouse if PO	<a href="#">Transportation Details Overview</a>  117

Function	Description	Further Information
Receiving/Reporting -> Storage & Transportation -> Transportation Edit Transportation Details	Edit assigned transportation details.	<a href="#">Transportation Details Overview</a> 
Receiving/Reporting -> Storage & Transportation -> Transportation Delete Transportation Details	Delete assigned transportation details.	
Receiving/Reporting -> Set as not received / reported	Only the receiving status of a PO will be set as "not received". Please use carefully. Stock will not be updated.	
Receiving/Reporting -> Set as partially received / reported	Only the receiving status of a PO will be set as "partially received". Please use carefully. Stock will not be updated.	
Receiving/Reporting -> Set as completely received / reported	Only the receiving status of a PO will be set as "completely received". Please use carefully. Stock will not be updated. If PO is completely invoiced (in case your company use invoices), PO will be closed.	
Invoicing	Only available if your company use the Invoicing Module.	
Invoicing -> Set Invoice Type	You can change type of assigned invoices (partially, completely). Budget will be updated.	
Invoicing -> No Invoice expected	Mark PO invoicing status with "no invoice expected". No invoice can be assigned to this PO.	
Invoicing -> Undo no Invoice expected	Undo "no invoice expected". Invoice can be assigned to PO.	

Function	Description	Further Information
Invoicing -> Show Invoice Overview	Gives an overview about all invoices assigned to selected PO.	
Invoicing -> Handle non approved invoices	If an invoice is assigned to selected PO and not approved yet, you can approve invoice directly out of the Purchase Module without using the invoice registration.	
Invoicing -> Assign Invoice -> Add completed Invoice		
Invoicing -> Assign Invoice -> Add partial Invoice		
Invoicing -> Assign Invoice -> Credit Note		
Invoicing -> Assign Invoice -> Remove Invoice		
Create Sub -> New Requisition	As long as PO is not completely received you can create sub Requisition for items supplier is not able to deliver. You can switch either complete item (switch quantity = ordered quantity: item will be removed from PO) or a part of the ordered quantity (switch quantity < ordered quantity: item with quantity ordered minus switched will remain in source PO, new item with switch quantity will be assigned to new Sub RQ). New created requisition will be linked to PO. The TAN is the same marked with a running letter as suffix.	
Create Sub -> New Purchase Order	As long as PO is not completely received you can create sub Purchase Order (if the new supplier is known) for items supplier is not able to deliver. You can switch either complete item (switch quantity = ordered quantity: item will be removed from source PO) or a part of the ordered quantity (switch quantity < ordered quantity: item with quantity ordered minus switched will remain in source PO, new item with switch quantity will be assigned to new Sub PO).	

Function	Description	Further Information
	New created PO will be linked to source PO. The TAN is the same marked with a running letter as suffix.	
Create Sub -> set PO as closed	Mark PO as closed. Please note: only status will be changed. No effects for stock e.g.	
Resend	Resend PO again to supplier with entry in history.	
E-Mails	If you sent PO to supplier out of the system all sent emails will be shown here.	
Distribute	Only available for POs (currently). Allows to copy PO to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Copy Items to RQ	Only available for PO (not for SO). Copy selected items to existing requisition for same site. You can either only copy then items.	
Rate Supplier	Add manual rating for supplier.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Create Data Transfer (without attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Attachments -> Attach	Add documents to requisition.	Add Documents
Attachments -> Show/Delete	Show all assigned documents with possibility to delete attachments.	
Set Capital Asset	Mark selected items as capital assets.	<a href="#">Capital Asset Report</a> <sup>[116]</sup>
Add Remark to History	Add remark manual to history of selected document.	
Check Closing Status	Check after data transfer if PO can be closed. Normally this will be done by special tool "Once a	

Function	Description	Further Information
	day".	
Print Article Label	If a dymo printer is assigned you can print article label for selected spare parts.	
Remove Link to Dry Dock Job Card	Remove link between dry dock job card and PO.	
Link to Dry Dock Job Card	You can link PO to selected dry dock job card. PO will remain in open status – only a link between job card and PO will be stored. Link information is available in PO html overview.	
Cost Center -> Assign Cost Center	Assign Cost Center to PO.	
Cost Center -> Clear Cost Center	Clear Cost Center from PO.	
Follow up / Pin to User Activities -> Follow up	Follow up for PO can be given.	
Follow up / Pin to User Activities -> Clear Follow up	Follow up for PO can be deleted.	

### ***Receive Items***

Once a Purchase Order has the status 'Sent', it can be received from ship's side. Upon complete receipt the PO will be closed on board.

Only the needed function will be displayed when using this button: A Purchase Order can only be 'received', a Service Order can only be 'reported' (unless Spare Parts have been ordered in the same SO).

When receiving items, a date can be recorded. As default the current date is shown, but can be overwritten.

#### **Complete receipt of a PO**

Per default the system will fill the column 'Quantities Received' with the quantities ordered. If you want to completely receive the PO, just click on 'Save' and the PO will be closed with the quantities given. Delivery Note Number and Receiving Remarks can be entered in the same window. All completely received items will be displayed in green letters.

#### **Partial receipt of a PO**

If you want to partially receive a PO respectively some items, please adjust the quantity in the Receiving screen to the correct quantity received and click 'Save'. Partially received items are displayed in orange, not received items kept in black. Once outstanding items are delivered, the PO can be completely received by clicking again 'Receive Items' and 'Save'.

**No further delivery expected for Item**

You have the possibility to close a PO although the quantity received is less the quantity ordered. This is mostly important for orders containing chemicals, paint or lubeoil where the stock in the system shall always show the correct figures. In these cases please always state the correct quantity received and click on 'No further delivery expected for item'. In the following window you have two choices:

- If you click 'Yes' the quantity which you entered will be saved.
- If you click 'No' the quantity received will be set to zero.

In both cases the items will be set as completely received and appear in green letters afterwards.

Receive multiple items possible – hit Actions -> Receive multiple POs. **Receive multiple only available for completely receiving.** Select POs, you want to receive completely, enter necessary details (receive date e.g.) and hit button “receive selected completely”

#### 10.4.5 Overview rejected Purchase Orders

Function	Description	Further Information
Show Details	Shows the edit form with read only right.	
Show	Displays the PO as it has been sent to the Supplier	
Undo Reject	Undo reject PO. PO slides from folder “rejected” to folder “open”.	
Delete	Delete purchase order. Please note: PO and all relevant documents (attachments, history, eventually created RfQs, requisition etc.) will be deleted completely from system and will no longer be available.	
Set as Standing Order	Set the PO to the standing order list.	<a href="#">Copy from standing order</a> <sub>122</sub>
Update -> Internal Remark -> Add	Quick adding of an internal remark.	
Update -> Internal Remark -> Edit	Quick access to already added internal remark.	

Function	Description	Further Information
Update -> Update Quotation Number		
Update -> Title		
Update -> Add/Edit Item External Remark		
E-Mails	If you sent PO to supplier out of the system all sent emails will be shown here.	
Distribute	Only available for POs (currently). Allows to copy PO to other/same ship. If no equivalent spare part is found on the destination site, all ship specific spare parts will be copied as free line item.	
Copy items to RQ	Only available for PO (not for SO). Copy selected items to existing requisition for same site. You can either only copy then items.	
Rate Supplier	Add manual rating for supplier.	
Show History	Access to the whole history of the selected purchase document including all associated documents (for instance, if you want to see the history of a purchase order, you have access to the history of the associated requisition too). The history is divided into several tabs for a better overview.	
Create Data Transfer (without Attachments)	Generates an unscheduled immediate data transfer without available attachments.	
Create Data Transfer (with Attachments)	Generates an unscheduled immediate data transfer with available attachments.	
Show Attachments	Show available documents. No deleting possible.	
Add Remark to History	Add remark manual to history of selected document.	
Print Article Label	If a dymo printer is assigned you can print article label for selected spare parts.	



### 10.4.6 Switch Items

Switch items to existing requisition for the same ship.

You can select either to move items (they will no longer appear in the source document) or to copy items (they will appear in both documents).

*Requisitions:*

Items from Requisitions can only be switched to other requisitions.

*Purchase Orders:*

As long as a purchase order is open, the items can be switched to other requisitions or to other purchase orders.

The destination purchase order must not be sent to a supplier.



Once a purchase order is approved, the items can only be switched to another purchase order.


## 10.5 Overview Reports

Function	Description	Further information
Open POs	Overview about all sent or received and not completely invoiced purchase orders for selected time frame - use for provision.	
Unapproved Invoices	You can call up a list of all unapproved invoices. Open Invoice Registrators "Handling" Tab for handling unapproved invoices.	
Show Overview	After selecting of loading options (Types: RQ, RfQ, PO; Status: open, sent etc.; Ships) you will get an overview about all relevant documents.	
Unreceived Items	Gives an overview about all not completely received purchase orders for all or selected ship(s).	
Capital Assets	Gives an overview about all purchase orders with items marked as "capital asset" for selected time frame and all or selected ship(s).	<a href="#">Set capital assets</a> <sup>112</sup>

Function	Description	Further information
Expenses per Supplier	Gives for all or selected supplier(s) for special time frame an overview about all expenses.	
Warehouse/Transportation - > Warehouse	Gives for a selected warehouse an overview about all purchase orders marked as "received in warehouse". Here you can assign transportation details to selected purchase orders and mark them as "dispatched from warehouse" with possibility of creating pro forma invoice.	
Warehouse/Transportation - > Warehouse to ship	Gives an overview about all purchase orders for selected ship which are received in warehouse and not completely received on board.	
Warehouse/Transportation - > Transportation Details	Gives an overview about all transportation details for selected time frame.	

## 10.6 Overview Actions

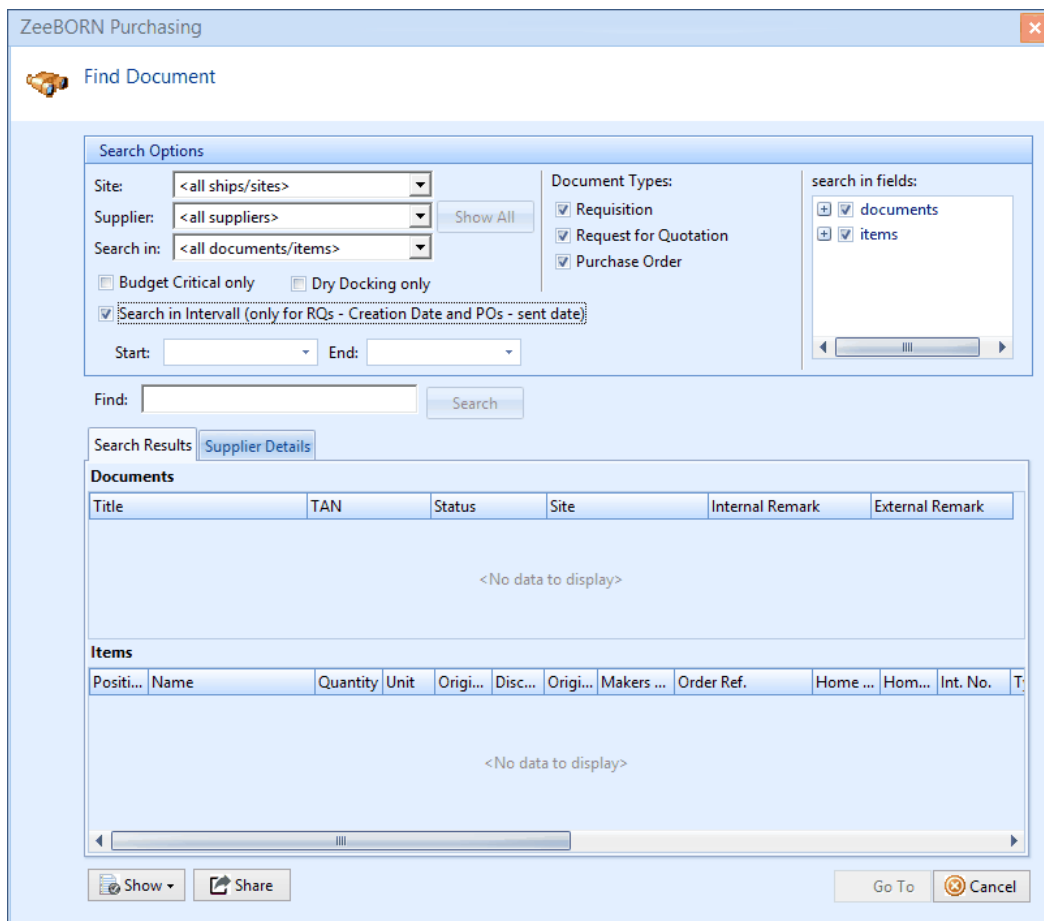
Function	Shortcut	Description	Further Information
Share	Ctrl + P	Share document overview to ZeeBORN Document, pdf or send to printer.	<a href="#">Share</a> 
Refresh	F5	Refresh tree view. If the current changes are not visible on the screen, please hit "Refresh".	
Show Legend		Show overview about all used icons.	
Show inactive sites only		After clicking the button only inactive sites will be shown in Purchase Module.	
Search	F3	Search in Purchase Module.	<a href="#">Search</a> 

Function	Shortcut	Description	Further Information
Stock Search	F4	Search spare parts in purchasing module or in stock.	<a href="#">Stock Search</a> 
Receive multiple POs			
Contact Details to Clipboard		Allows copying of selected contact details (Address, Phone etc.) for selected supplier to clipboard.	
Send Feedback		Allows user to send change request or error information direct to ZeeBORN Support.	
Check Stock Changes		Check stock changes for all approved on board requisitions. If stock changes were detected they will be assigned to checked requisition.	
Check Closing Status		Check the closing status of all sent and not closed purchase orders. If necessary, a new status will be assigned.	
Convert free line items to spare parts		System will show all requisitions containing free line items and created within selected time frame for selected ship. After selecting items to be convert to spare parts system will create new parts in the ships database and replace the free line items in the requisition by the newly created articles.	
Check Jobs (Skip Until Service = true, Service deleted)		In former versions the service information for delayed jobs were not deleted in case of rejecting/deleting associated service quotation/order. With this functionality the service information can be deleted.	
Check POs (completely invoiced, but Value in invoiced <> value booked in budget)		Show overview about all purchase orders which are marked as completely invoiced where invoiced value in budget differs from budget value.	
Check Jobs - wrong Service Information			
Assign Supplier to several RQs			

Function	Shortcut	Description	Further Information
Sent Agency Request Overview/Close multiple			

### 10.6.1 Search

You will find the search function under the button “action” -> “Search” or you can use the shortcut F3.



#### Search Options

<b>Site:</b>	You can select one ship or search over all ships.
--------------	---

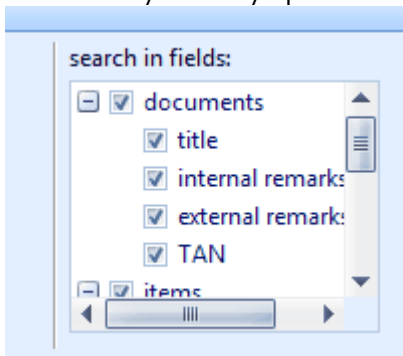
<b>Supplier:</b>	You can either select one specific supplier or you can search over all suppliers. Please note: Once you've selected one supplier, the button "Show all" is enabled. If you hit this button, all documents (RQ etc.) from this supplier will be shown.
<b>Search in:</b>	You can select if you want to search in the main document, in the items or in both types.
<b>Budget critical only:</b>	Searching only in documents where budget critical is checked.
<b>Dry Docking only:</b>	Searching only in documents where dry docking is checked
<b>Search in interval:</b>	If you check "Search in interval..." you have to enter start and end of interval date – the system will then search only Requisitions which creation date is within the selected interval or purchase orders with a sent date within the interval.

### Document Types

As default all types (requisition, request for quotation, purchase order) are selected. You can uncheck types you don't need for your specific search.

### Search in fields

As default all fields are checked. If you want to fasten up the search you can uncheck unnecessary fields by open the list via clicking the plus.



For the main documents you can search in:

- Title
- Internal remarks
- External remark
- TAN

For the items you can search in:

- Title
- Internal remarks
- External remark
- Internal number
- Type description
- Article Number
- Makers Reference

The more specific the search options are the faster is the search.  
Once you find searched document, you can either view details directly by hitting button "Show" or you can go to the document in the tree via Button "Go To".

### 10.6.2 Stock Search

Search for articles in stock or purchase transactions.

## 10.7 Legend

Shows list of icons used in purchase module.

## 10.8 Analysing Budget

If you are using the [ZeeBORN Budget Module](#)<sup>78</sup>, you are able to check if a purchase document exceeds a given limit.

green ball = limit not exceeded

yellow ball = daily limit exceeded, but yearly limit not


red ball = complete limit exceeded

## 10.9 Overview General

Function	Description	Further Information
New Requisition	Generate new Requisition. If you create requisition in office a ship has to be selected for create RQ to.	<a href="#">Creating/Editing Requisitions</a> <sup>80</sup>
New Agency Request	Generate a new Agency Request. Function is only available in office.	
New Forward Order	Generate a new Forward Order for separate delivery costs. Function is only available in office.	
New Service Order (Office)	Generate a new Service Order. Function is only available in office. Order information are shown only in Purchase module.	
Select my Ships	Available in Office only. With "select my ships" system is selecting only ships in tree you selected under " <a href="#">Configuration - Assign my Ships</a> " <sup>72</sup>	
Copy from standing order	Create new requisition by copying an existing and as standing order marked documents (RQ, RfQ, PO). (see more information)	<a href="#">Set as standing order</a> <sup>84</sup>
Send Queue	Sending of all collected documents to the respective supplier.	
Send complete Queue	Sending of all collected documents to the respective supplier from all user.	

## 10.10 How Tos

How To	Description
<a href="#">Show last supplier</a> <sup>129</sup>	Show last supplier for purchase article.
<a href="#">Follow Up Purchase Document</a> <sup>136</sup>	How to use the functionality to follow a purchase document and show the document in user activities.
<a href="#">Agency Requests</a> <sup>257</sup>	How to use and configure agency requests.
<a href="#">Pro Forma Invoices</a> <sup>131</sup>	How to mark Purchase Order as received in warehouse, send from warehouse to ship and generate pro forma invoice.

How To	Description
<a href="#">Rate Supplier</a> 	How to rate supplier via contact or rating tool.
Forward Orders	
Split POs - Booking Date	
Default Currency and Discount per Supplier	To assign a default currency and default discount in percent.
Show Edit Form in max. Size	You are able to decide whether you want to have the edit form in the same size as the main form or smaller. You find the button in the User Settings and use for Edit Quotation, RQ, RfQ and PO.

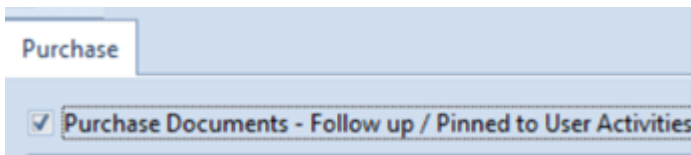
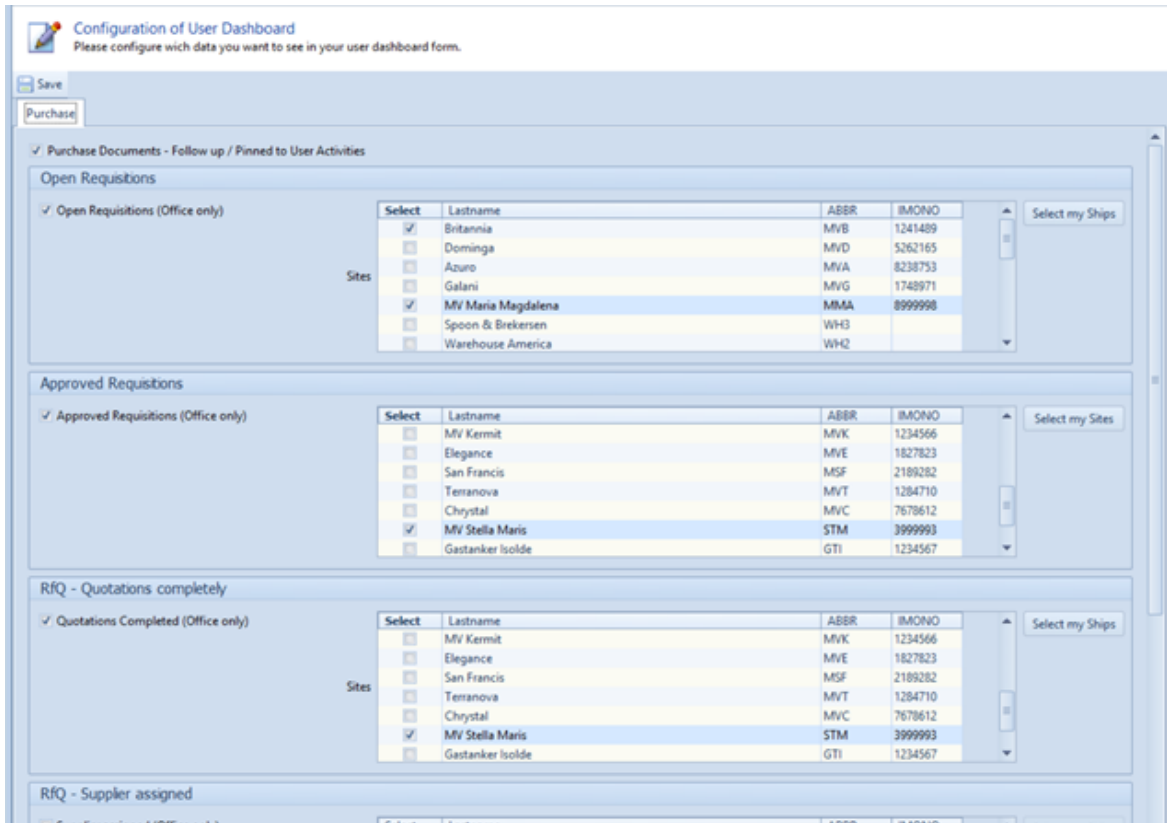
### 10.10.1 User Dashboard

When you start ZeeBORN and then Purchase module, your user dashboard is displayed automatically in a separate window – if entries are available. An overview of all transactions can be made. As long as you do not close ZeeBORN, the window will never be displayed automatically again.

#### 1. Configuration

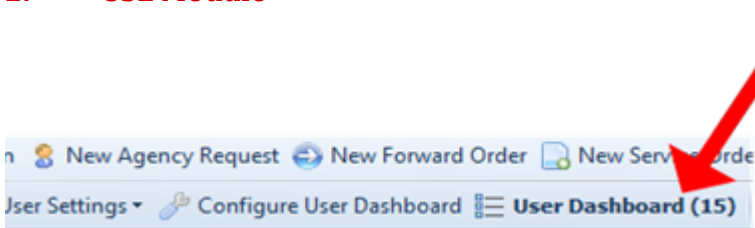
The configuration for User Dashboard can be started with “Configure User Dashboard”.



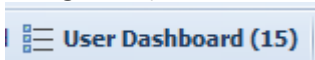


A follow up can be given for all Purchase Documents. If “Purchase Documents - Follow up / Pinned to User Dashboard” is selected, in User Dashboard all information, which are assigned to the user, will be shown there.

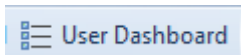
**2. USE Module**



Behind “User Dashboard” the count of open transactions will be displayed. The lettering will be shown in bold lettering. The system will refresh the user dashboard all 10 minutes (in the background) and after leaving the user dashboard.



15 transactions in User Dashboard are available



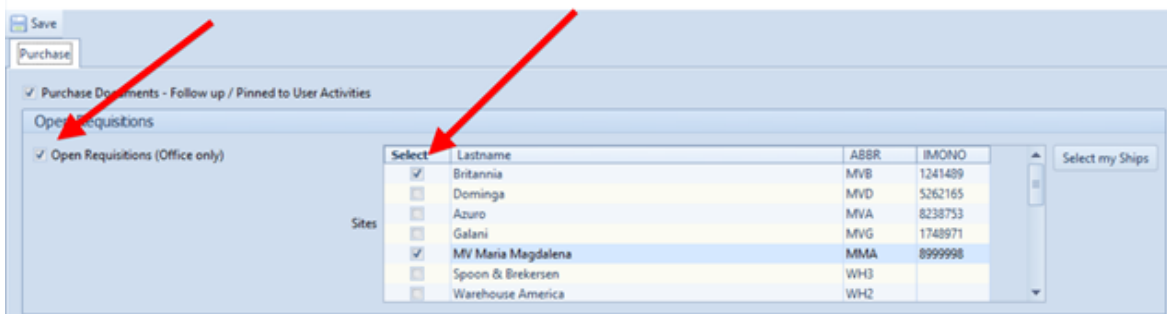
no transactions are available

By clicking on button “User Dashboard” the User Dashboard will be opened. “Open Requisitions”, “Approved Requisitions”, “RfQ - Quotations completely”, “RfQ - Supplier assigned” and “On Hold Purchase Order” are parts of the User Dashboard.

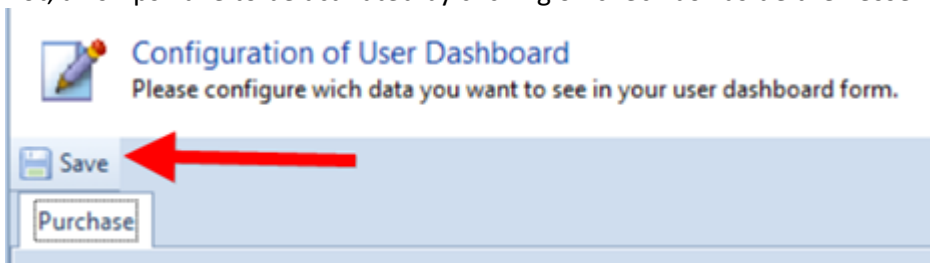
The following features can be configured:

Open Requisitions	All on board approved requisitions of selected ships will be shown.
Approved Requisitions	All approved requisitions of selected ships will be shown.
RfQ Quotations complete	All RfQ marked in Purchase as complete of selected ships will be shown - see: 1. RfQ section – alert function in this mail.
RfQ Supplier assigned	All RfQ where suppliers are assigned of selected ships will be shown.
Purchase Orders on hold	All POs of selected ships which are set on hold will be shown.
Follow up / Pin to User Dashboard	All Follow up of the logged users will be shown separate by RQ, QT, RfQ and PO if the assigned date is the current day or older.

To active the controlling of a Purchase sector, please activate check box before the needed sector.



If “Assign my Ships” was done, all needful ships can activate with click on “Select my Sites”. If not, all ships have to be activated by clicking on check box aside the vessel name.



With “Save” all adjustments will be saved. The configuration can be changed consistently by clicking on “Configuration User Dashboard”, changing ships or Purchase sectors and adjust with “Save”.

The screenshot shows the ZeeBORN Purchasing interface. At the top, there are navigation tabs: 'Configure User Dashboard', 'User Dashboard (99)', 'Send Queue', and 'Send complete Queue'. Below the tabs are icons for 'Load/Refresh', 'Share Overview', 'Sort by Sites', and 'Configure'. The main content area displays a list of requisitions for 'MV Maria Magdalena' with columns for the requisition ID (e.g., RQ-MVG-C-14-030), the date (e.g., 05.05.2014), and an 'Approve' button. Below this list is a section titled 'Approved Requisitions' which contains a table with three columns: 'Site', 'TAN', and 'Date'.

Site	TAN	Date
Britannia	<a href="#">RQ-MVB-C-15-175A</a>	
Britannia	<a href="#">SQ-MVB-Y-15-159</a>	30.05.2015
Dominga	<a href="#">RQ-MVB-C-15-148A</a>	
Dominga	<a href="#">RQ-MVB-C-14-355A</a>	
Dominga	<a href="#">RQ-MVB-C-15-261A</a>	27.06.2015
Dominga	<a href="#">RQ-MVB-C-15-257A</a>	
Dominga	<a href="#">RQ-MVB-C-15-250</a>	24.06.2015

Follow the Hyperlink for more information to the single transaction.  
For some sections there are additional functions:

The screenshot shows the ZeeBORN Purchasing User Dashboard. At the top, there is a navigation bar with 'ZeeBORN Purchasing' and several utility icons: 'Load/Refresh', 'Share Overview', 'Sort by Sites', and 'Configure'. Below this is a header section titled 'User Dashboard'. The main content area is titled 'Open Requisitions' and contains a table with two rows of requisitions. Each row has columns for 'Site', 'TAN', 'Date', and 'Approve'. The first row shows a requisition for 'Britannia' with TAN 'RQ-MVB-CP-16-001' and date '07.08.2016'. The second row shows a requisition for 'Britannia' with TAN 'SQ-MVB-Y-15-160' and date '31.05.2015'. Both rows have an 'Approve' button next to the date.

Site	TAN	Date	Approve
Britannia	<a href="#">RQ-MVB-CP-16-001</a>	07.08.2016	Approve
Britannia	<a href="#">SQ-MVB-Y-15-160</a>	31.05.2015	Approve

Open Requisitions can be approved directly in the User Dashboard. After approving the requisition will be deleted from the User Dashboard.

The screenshot shows the 'Approved Requisitions' section of the User Dashboard. It displays a list of requisitions in a table format. The table has columns for 'Site', 'TAN', and 'Date'. There are eight rows of requisitions, alternating between 'Britannia' and 'Dominga' sites. Each row shows a unique TAN and a date. The 'Date' column is empty for the first and third rows, and contains dates for the other rows.

Site	TAN	Date
Britannia	<a href="#">RQ-MVB-C-15-175A</a>	
Britannia	<a href="#">SQ-MVB-Y-15-159</a>	30.05.2015
Dominga	<a href="#">RQ-MVB-C-15-148A</a>	
Dominga	<a href="#">RQ-MVB-C-14-355A</a>	
Dominga	<a href="#">RQ-MVB-C-15-261A</a>	27.06.2015
Dominga	<a href="#">RQ-MVB-C-15-257A</a>	
Dominga	<a href="#">RQ-MVB-C-15-250</a>	24.06.2015
Dominga	<a href="#">RQ-MVB-C-15-251</a>	24.06.2015
Dominga	<a href="#">RQ-MVB-C-15-255</a>	25.06.2015

All approved requisitions will be displayed as list.

### RfQ - Quotations completed

Site	TAN	Select Supplier
MV Stella Maris	<a href="#">RfQ-STM-C-15-171</a>	Select
MV Stella Maris	<a href="#">RfQ-STM-C-15-129</a>	Select

With button “Select” the process “Select Supplier” can be started directly from the User Dashboard. After selecting the supplier, the RfQ will be deleted from User Dashboard

### (over)due Purchase Orders on hold

Site	TAN	Latest send Date
MV Stella Maris	<a href="#">PO-STM-C-15-224</a>	25.02.2019

All Purchase Orders set on hold will be displayed as list.

### Follow Up

#### Follow Up Requisition

Site	TAN	Follow Up Date	Follow up Remark	Clear
Stella Maris	<a href="#">RQ-033-19-001</a>	08.02.2019	We need these spart parts till 28.02.2019.	Clear

#### Follow Up Request for Quotation

Site	TAN	Follow Up Date	Follow up Remark	Clear
Stella Maris	<a href="#">SRfQ-023-15-720</a>	08.02.2019	Paint has to be delivered till next week.	Clear
Maria Magdalena	<a href="#">RfQ-033-16-014</a>	08.02.2019	Cargo crossover valve is not tight.	Clear

#### Follow Up Purchase Order

Site	TAN	Follow Up Date	Follow up Remark	Clear
Stella Maris	<a href="#">PO-033-16-035</a>	08.02.2019	Invoice already received!	Clear

The Follow ups will be displayed as list sorted by transaction status. All Follow ups can be cleared directly in the User Dashboard by clicking “Clear”. After clearing the transaction will be deleted from dashboard.

### 10.10.2 Show last supplier

In the Purchasing Module you have now the possibility to get an overview about the last (current 3) Suppliers and POs for selected:

- article / spare part
- component
- component job.

This feature isn't available for free line items.

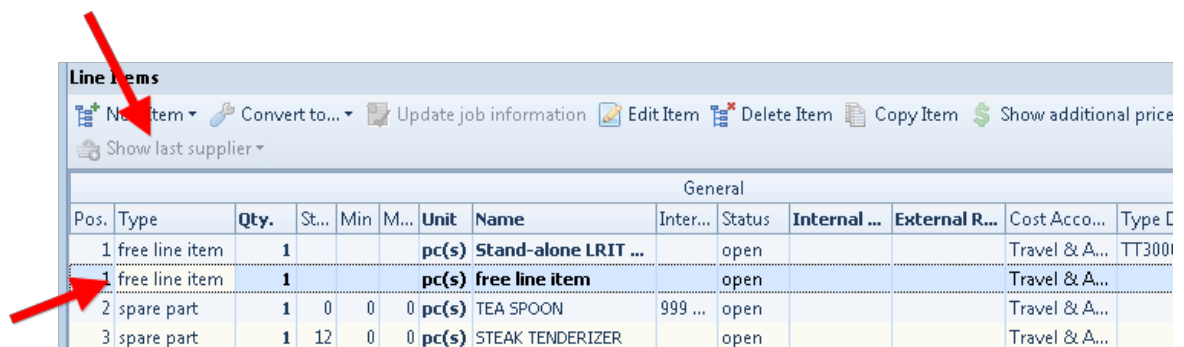
To start the feature open the edit form for RQs, RfQs etc. (or show details for sent and closed POs).

#### General

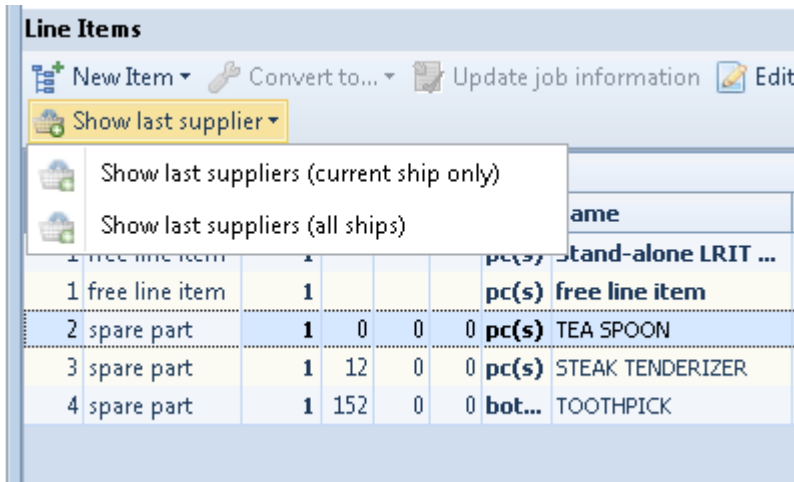
The system will show the last (current = 3) already sent or closed POs and their Suppliers. Open POs or RfQs/ RQs will not be shown.

#### Start

The button "Show last supplier" will only be enabled if spare parts, components or jobs as selected.



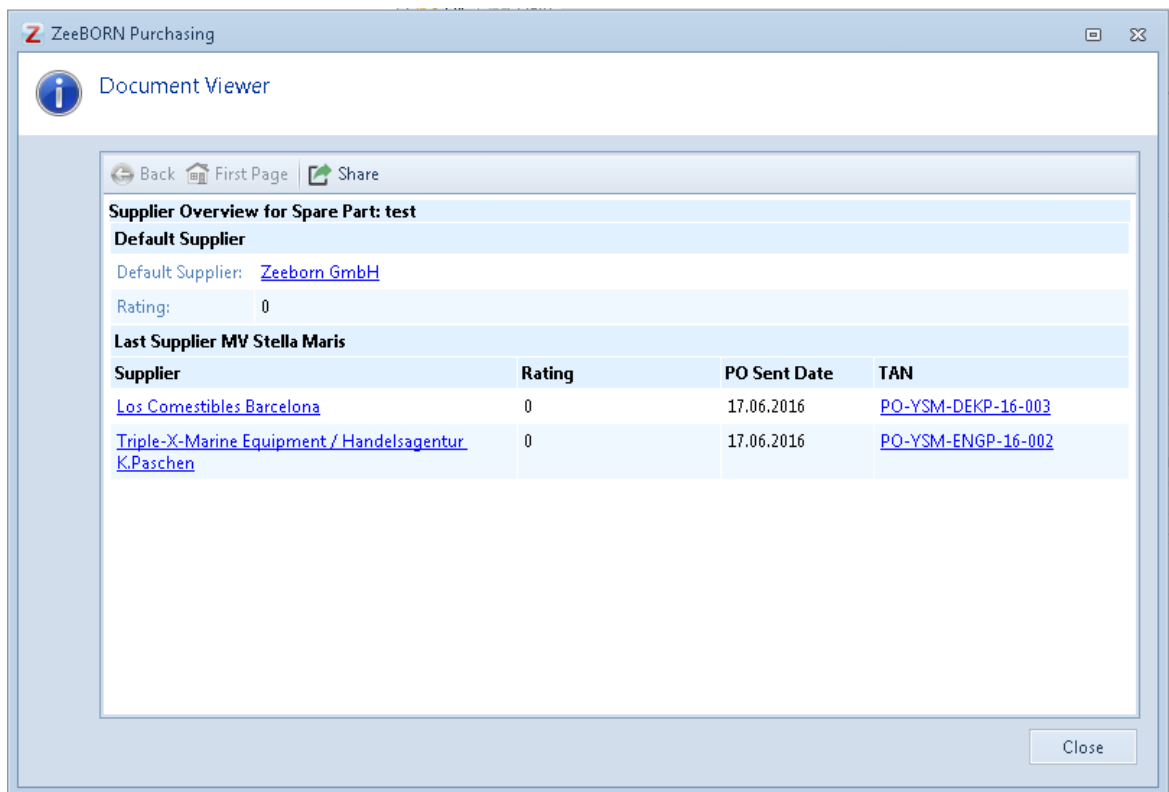
Line Items													
General													
Pos.	Type	Qty.	St...	Min	M...	Unit	Name	Inter...	Status	Internal ...	External R...	Cost Acco...	Type E
1	free line item	1				pc(s)	Stand-alone LRIT ...		open			Travel & A...	TT300
1	free line item	1				pc(s)	free line item		open			Travel & A...	
2	spare part	1	0	0	0	pc(s)	TEA SPOON	999 ...	open			Travel & A...	
3	spare part	1	12	0	0	pc(s)	STEAK TENDERIZER		open			Travel & A...	



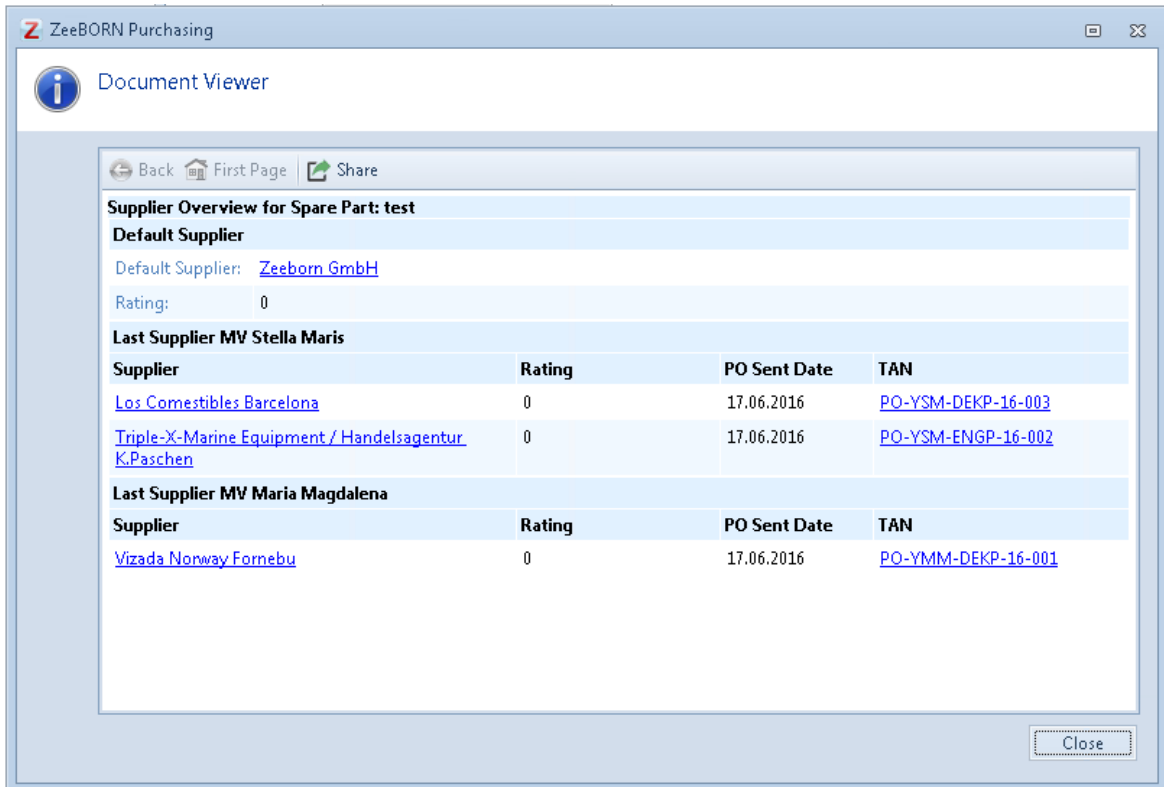
There are two ways:

**Show last suppliers (current ship only)**

The first option is faster but only the purchase orders of the current ship will be checked.



**Show last suppliers (all ships)**



**Supplier Overview for Spare Part: test**

**Default Supplier**  
 Default Supplier: [Zeeborn GmbH](#)  
 Rating: 0

**Last Supplier MV Stella Maris**

Supplier	Rating	PO Sent Date	TAN
<a href="#">Los Comestibles Barcelona</a>	0	17.06.2016	<a href="#">PO-YSM-DEKP-16-003</a>
<a href="#">Triple-X-Marine Equipment / Handelsagentur K.Paschen</a>	0	17.06.2016	<a href="#">PO-YSM-ENGP-16-002</a>

**Last Supplier MV Maria Magdalena**

Supplier	Rating	PO Sent Date	TAN
<a href="#">Yizada Norway Fornebu</a>	0	17.06.2016	<a href="#">PO-YMM-DEKP-16-001</a>

Close

With click on supplier link you will get suppliers information, with click on the TAN Link you will get the appropriate purchase order.

### Default Supplier

If a default supplier assigned to spare part this supplier will be shown in the overview also.

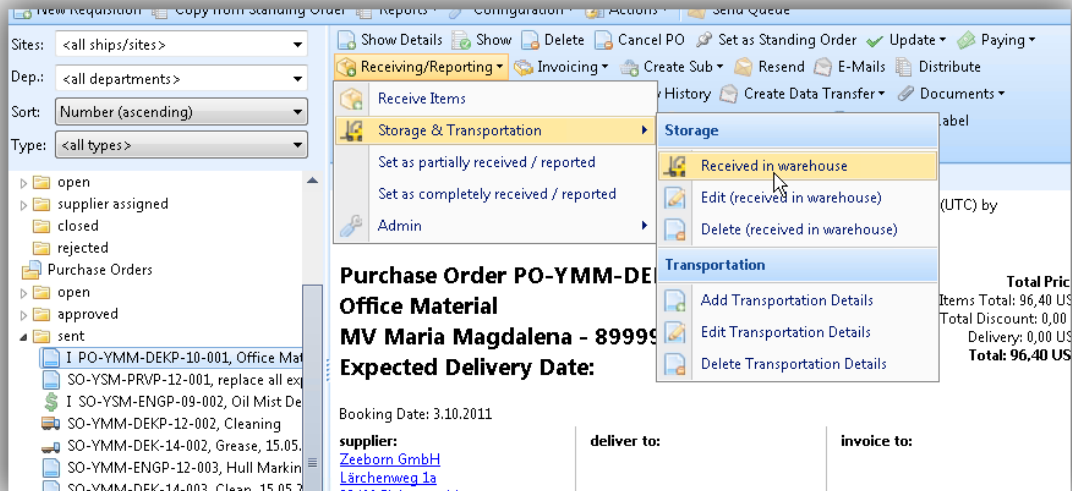
### 10.10.3 ProForma Invoices

In module „Purchase“ you have the possibility to create proforma invoices. These invoices are only available for spare parts from warehouse to ship.

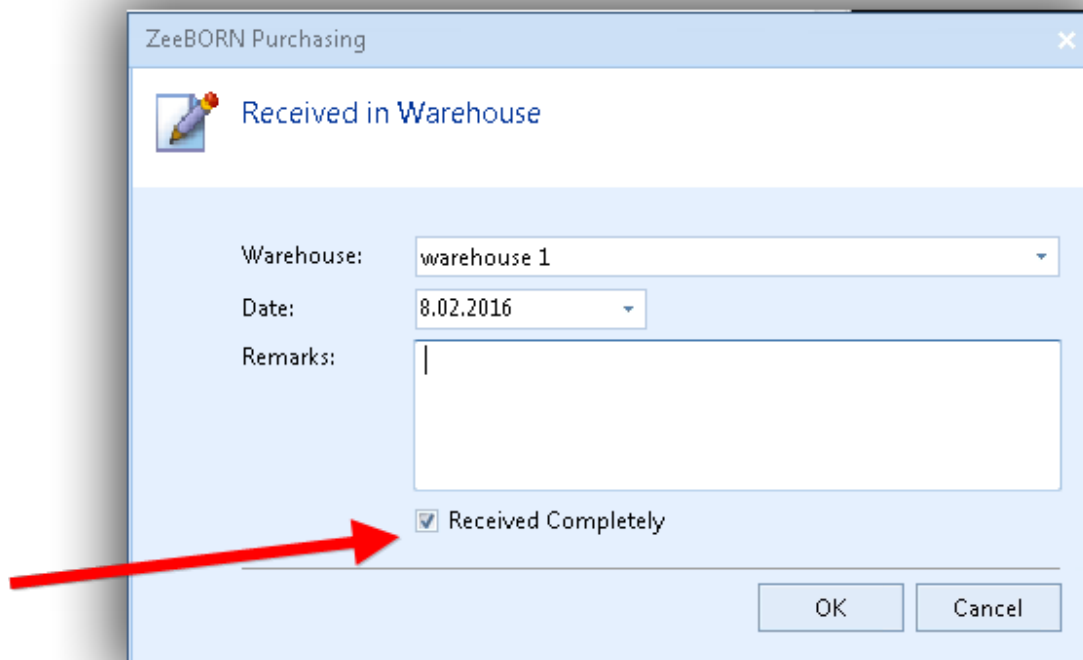
#### Receive in Warehouse

At first all spare parts of a PO have to be received in warehouse. Hit „Receiving/Reporting“ and choose „Storage &Transportation“. Hit „Received in warehouse“ and a new form will be displayed.



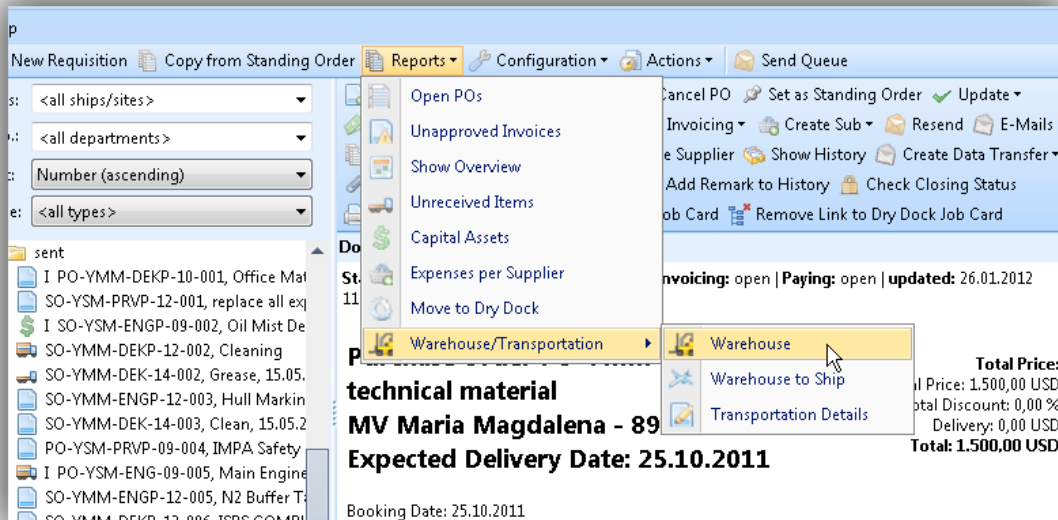


Choose the warehouse and fill in all relevant data as date and remark. All spare parts are set per default as completely received. If a PO is not completely received hit check box. Only information will be written in PO that it is partly received.

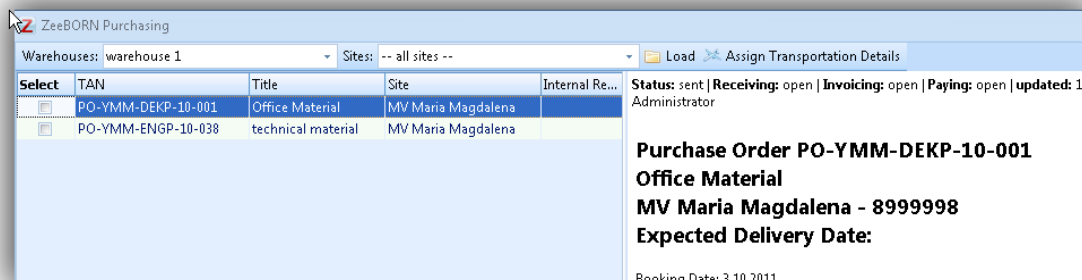


**Send to Ship**

For further handling go to "Reports" and choose „Warehouse/Transportation“. Here hit „Warehouse“.

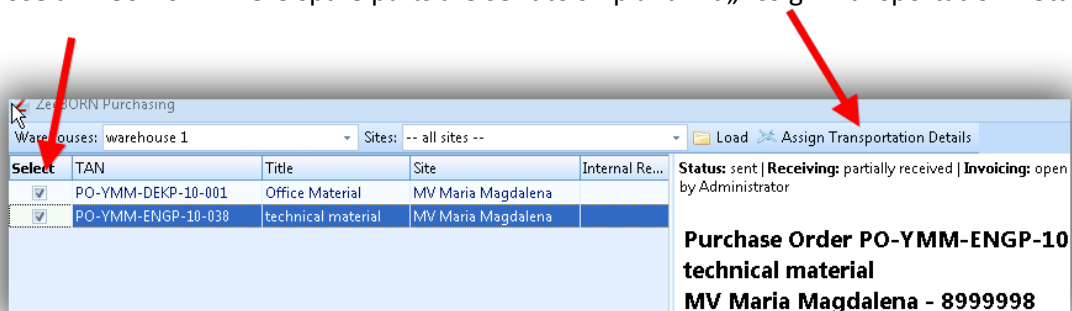


Choose the warehouse and the ship where the spare parts are sent to.



Now are all received PO (from this warehouse) with all spare parts are visible.  
 Please note: All spare parts from a PO are visible, also spare parts which are not received.  
 And all POs are visible, also PO where some spare parts are already sent to ship.

Choose all POs from where spare parts are sent to ship and hit „Assign Transportation Details“:



Fill in the form, although please note:

- Is the check box (1) activated, so are all spare parts sent from warehouse to ship. This check box has to be activated, when the last spare part from this PO leaves the warehouse.
- Is the check box (2) activated, a proforma invoice can be generated.

ZeeBORN Purchasing

**Transportation Details**

Transportation Type: Airplane

Date: 8.02.2016

Transaction Number: A12345

Destination Port: Arrecife

Remarks:

**1**  all stored items dispatched from warehouse

**2**  Generate pro forma Invoice

Attachment(s)

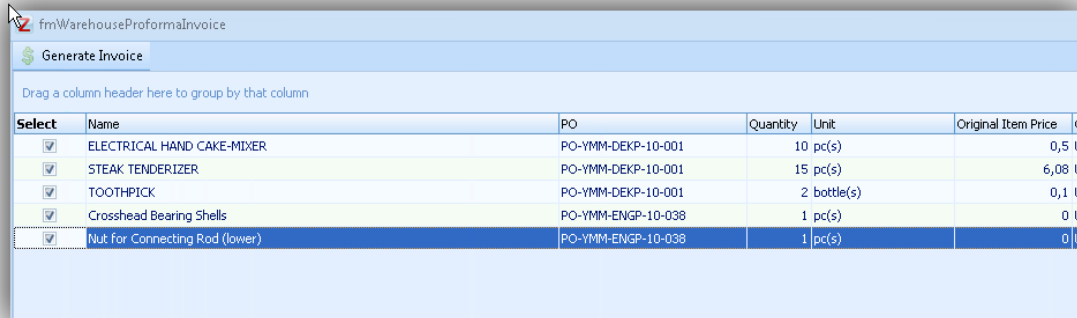
Filename	Title
<No data to display>	

Attach Show Remove

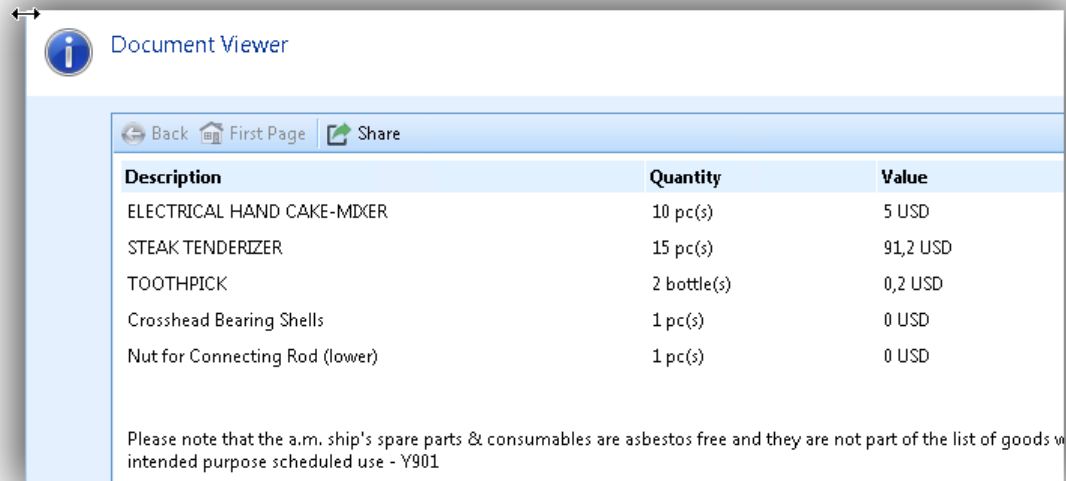
OK Cancel

### Proforma Invoice

To create the proforma invoice, please select all spare parts whichever part of this delivery. In screen all spare part of the selected POs are shown.



Per default are all spare parts selected, please erase all selections of spare parts, which are not part of the delivery.  
Hit „Generate Invoice“ to create the proforma invoice.



Hit „Share“ to print the invoice via printer or pdf.

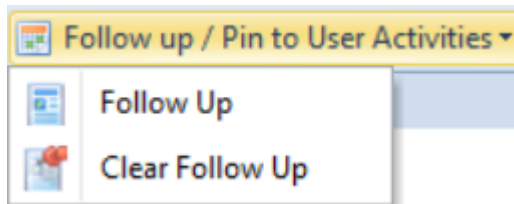
### 10.10.4 Follow Up Purchase Documents

There is a possibility to make a follow up information for purchase documents (RQ,RfQ,QT or PO). On depend of the Follow up Date the information will be visible in User Activities of the inserted user.

#### **Allocation of Follow Up data**

The follow up can be added for all documents excluded closed and rejected. Exception case: for closed PO/ SO a follow up can be added.

Hit "Follow up/Pin to User Activities" for adding a follow up.



Fill in the form, „Follow Up Date“ is per default filled in with today, and “Follow Up By“ is per default filled in with logged in user. Both can be changed. In “Follow Up By“ a name from list can be entered. A remark can be given.

ZeeBORN Purchasing

Follow Up / Pin to User Activities  
Please enter follow up date and user.

Follow Up Date: 17.02.2017

Follow Up By: Administrator

Remark:

OK Cancel

ZeeBORN Purchasing

Follow Up / Pin to User Activities  
Please enter follow up date and user.

Follow Up Date: 17.02.2017

Follow Up By: Administrator

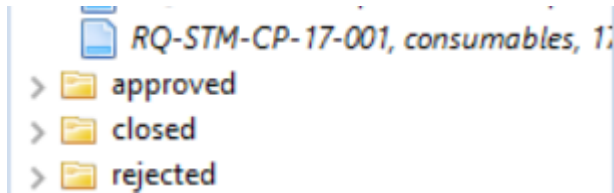
Remark:

- Name
- Administrator
- Voker, Erika
- ZeeBORN Support
- Vogel, Jürgen
- Mager, Anton
- Pillow, Oskar Daniel
- Oger, Peter

With „OK“ all changes will be saved and with „Cancel“ all changes will be destroyed..

### View HTML and Tree

All documents with a follow up information will be visible in tree in italic letter.



In HTML view the details will be shown in green letter.

---

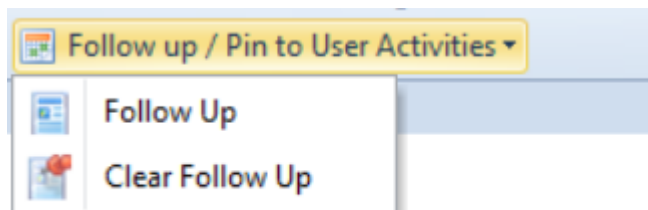
Follow Up by: Mager, Anton (assigned by Administrator) on 19.02.2017 Please wait for further instruction

**Budget Details**  
19-Warehousing:   
[click here for detail](#)

### Clear Follow Up

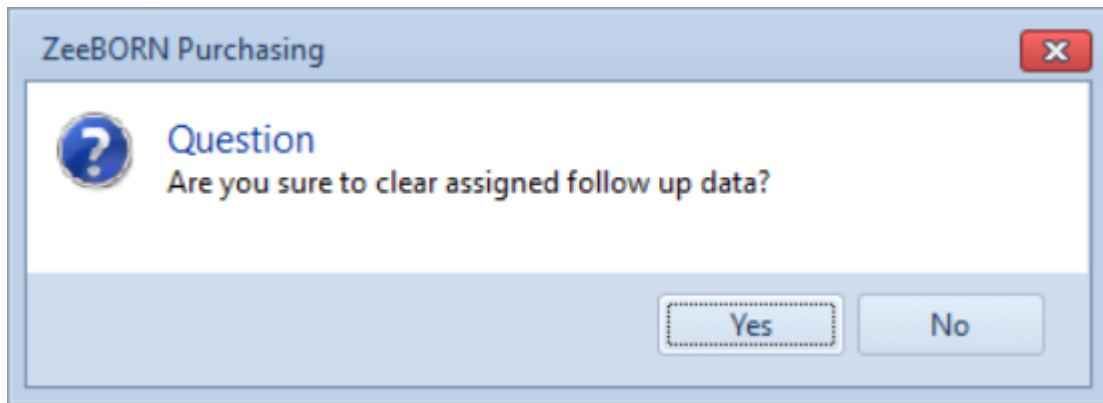
All follow ups have to be deleted, when they are finished. The follow up information will be displayed also when document switched from folder to folder.

Please hit "Follow up / Pin to User Activities" and choose "Clear Follow up".



istrator) on 19.02.2017 Please wait for further

**NOTE:** All user can delete all follow up information.



Hit „Yes“ for deleting the follow up.

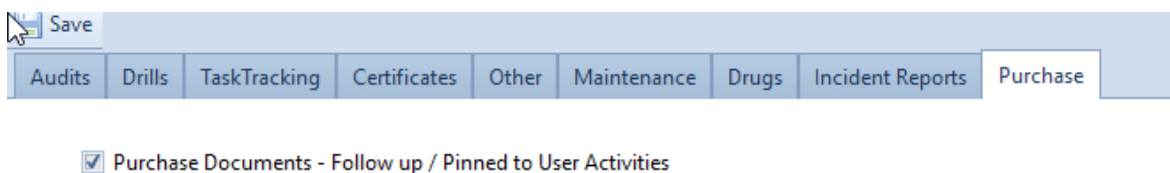
### User Activities

In User Activities of the current user all follow up information will be displayed which are allocated to this user.

User Activities			
Follow Up Requisition			
Follow Up Date	TAN	Site	Follow up Remark
17.02.2017	SQ-S -Y-11-002	MV Stella Maris	Please check.

### Configuration

Click TAB „User Activities“, hit „configure“ and go to TAB „Purchase“. Mark check box „Purchase Documents-Follow up/Pinned to User Activities“ and confirm with „save“.



### Display in User Activities

All follow ups will be displayed in the same order as Purchase tree: Requisitions, Request for Quotations and then Purchase orders.



User Activities			
<b>Follow Up Requisition</b>			
Follow Up Date	TAN	Site	Follow up Remark
17.02.2017	RQ- S-C-15-012	MV Sella Maris	don't forget
16.02.2017	RQ- M-C-14-004	MV Maria Magdalena	check position vessel
17.02.2017	SQ-K -Y-11-002	MV Kermit	Please check.
<b>Follow Up Purchase Order</b>			
Follow Up Date	TAN	Site	Follow up Remark
17.02.2017	PO-S -C-13-179A	MV Stella Maris	is on hold

If the follow up is assigned by another user, this will be displayed in „Follow up Remark“.

Follow Up Requisition			
Follow Up Date	TAN	Site	Follow up Remark
17.02.2017	RQ-MMA-C-15-002	MV Maria Magdalena	Assigned by: Mager, Anton this is your part



## 10.10.5 Rate Supplier

### General

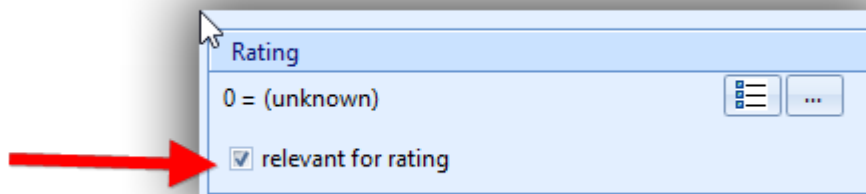
Our system has the possibility to rate all contacts  
The following values are used, these are currently still not customizable. If you need other values, we will install a configuration here:

0 = unknown  
1 = very good  
2 = good  
3 = fair  
4 = satisfactory  
5 = bad

### Preparation Rating Contacts

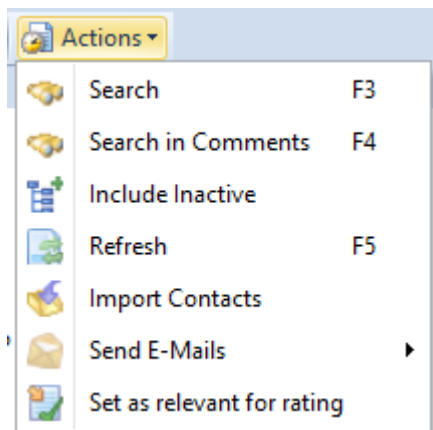
There are two choices to set contact as relevant for rating.

1. Direct at contact



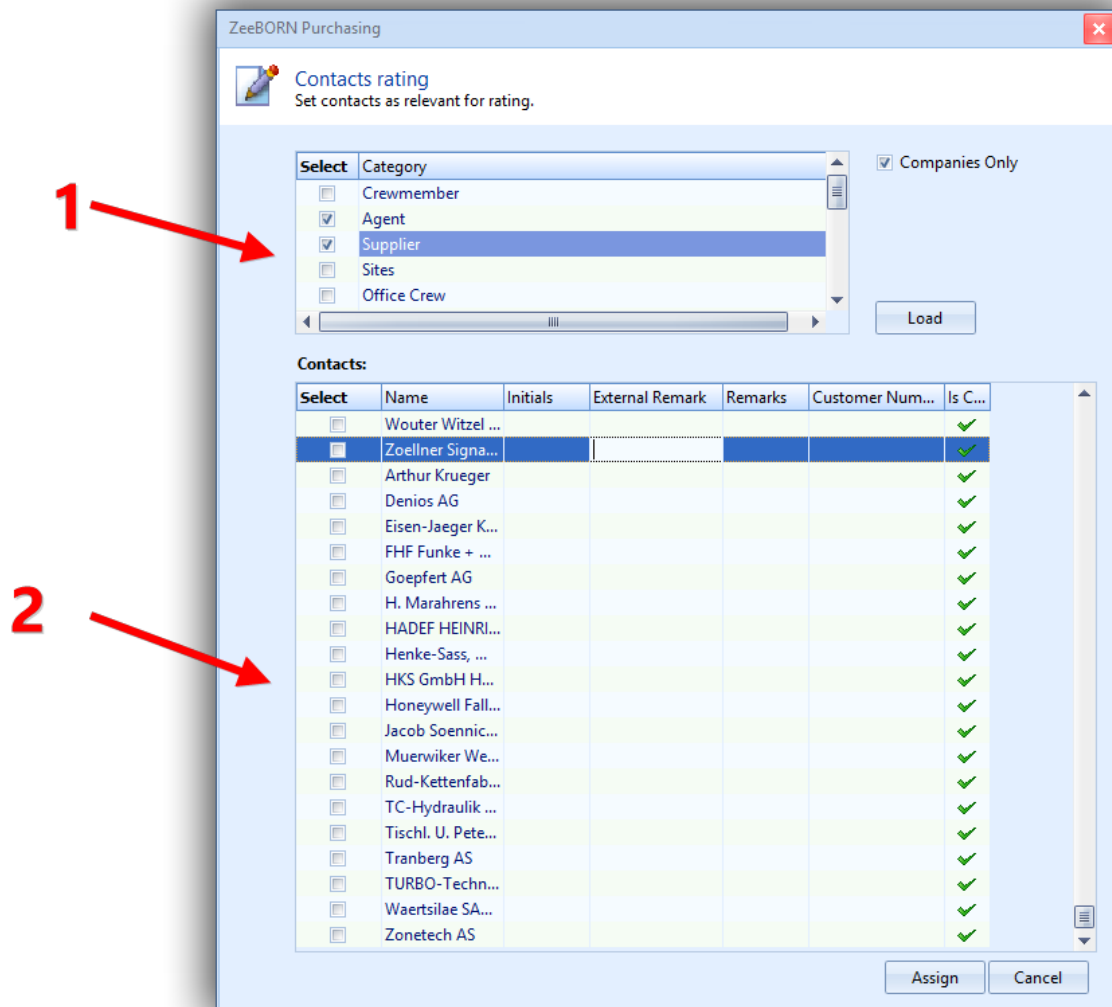
Start module „Contacts“ and choose the contact. Now hit „edit“ and then hit „Contact details“. After this you can see on the right side the check box „relevant for rating“.

## 2. per list



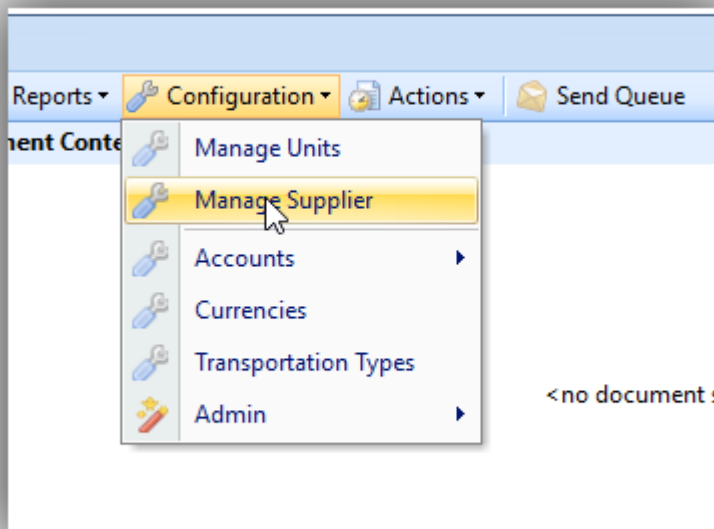
It is possible to select one or more Contact categories. As per default the system loads only companies. If person of companies are also will be rated, hit the check box beside „Companies only“.

Hit „load“ and all contacts will be visible. Now you can choose all needed contacts. Hit „assign“ for the activation of your choice.

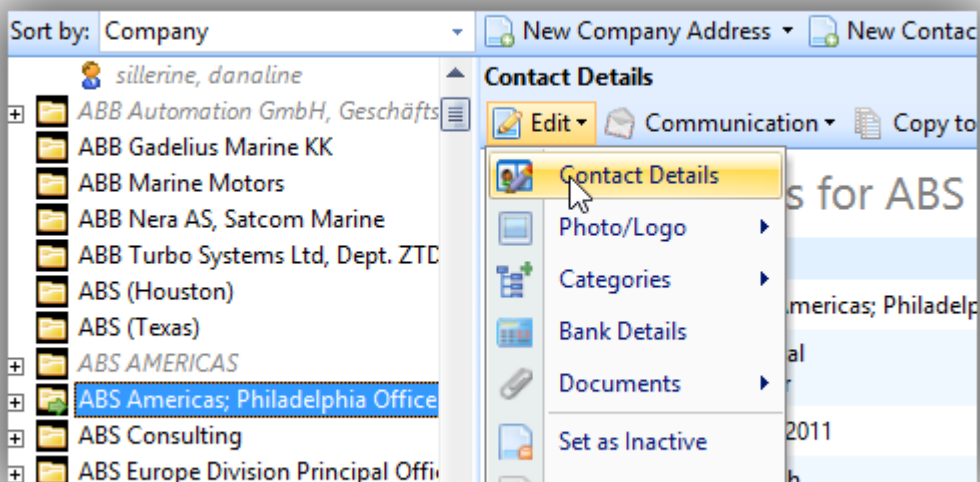


### Rating single contacts

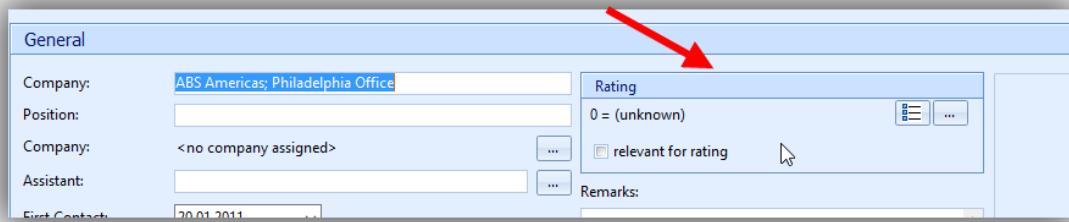
To rate a contact goto Contacts and choose the contact from the list. Or if you want to rate supplier goto Purchase. Hit „configuration“ and choose „Manage Supplier“ and choose the supplier.



Hit „Edit“ and choose „Contact Details“.



On the right side upper you will find the rating:



General

Company: ABS Americas; Philadelphia Office

Position:

Company: <no company assigned>

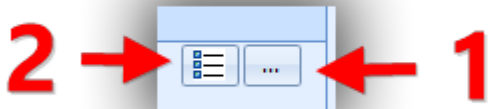
Assistant:

First Contact: 20.01.2011

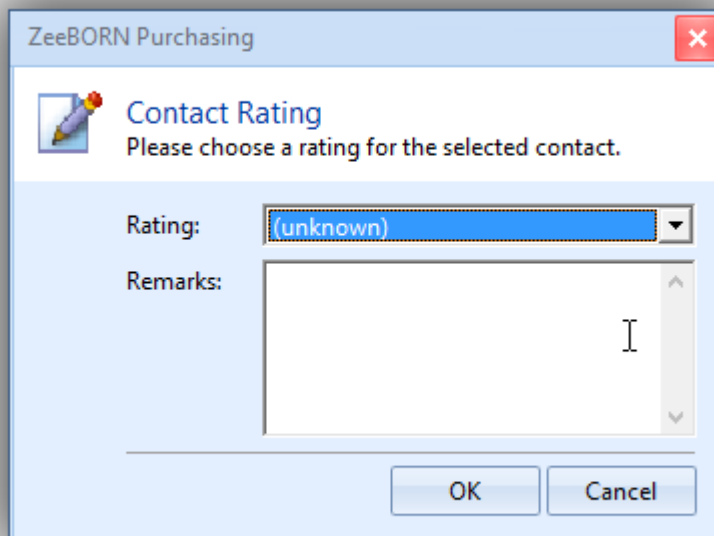
Rating: 0 = (unknown)

relevant for rating


Remarks:

**Button 1: Rate Contact**

Hit button "Rate Contact" and the following form appears.



ZeeBORN Purchasing

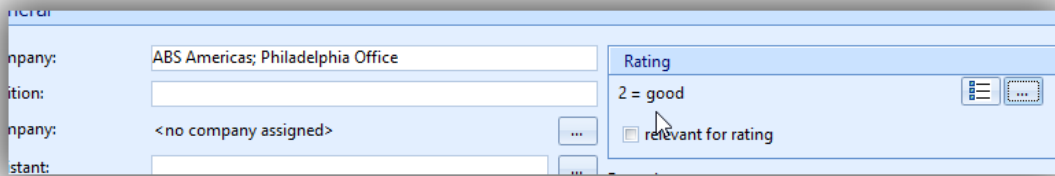
 **Contact Rating**  
Please choose a rating for the selected contact.

Rating: (unknown)

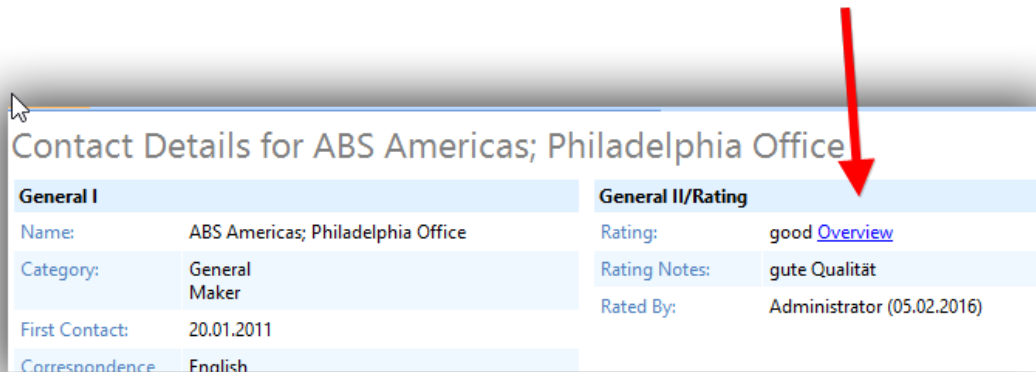
Remarks:

OK Cancel

Choose the needed rating and write a remark. The remark is not mandatory.  
Only if you rate with 5 (bad) the remark is mandatory..  
Hit „ok“ and the contact details will be updated.

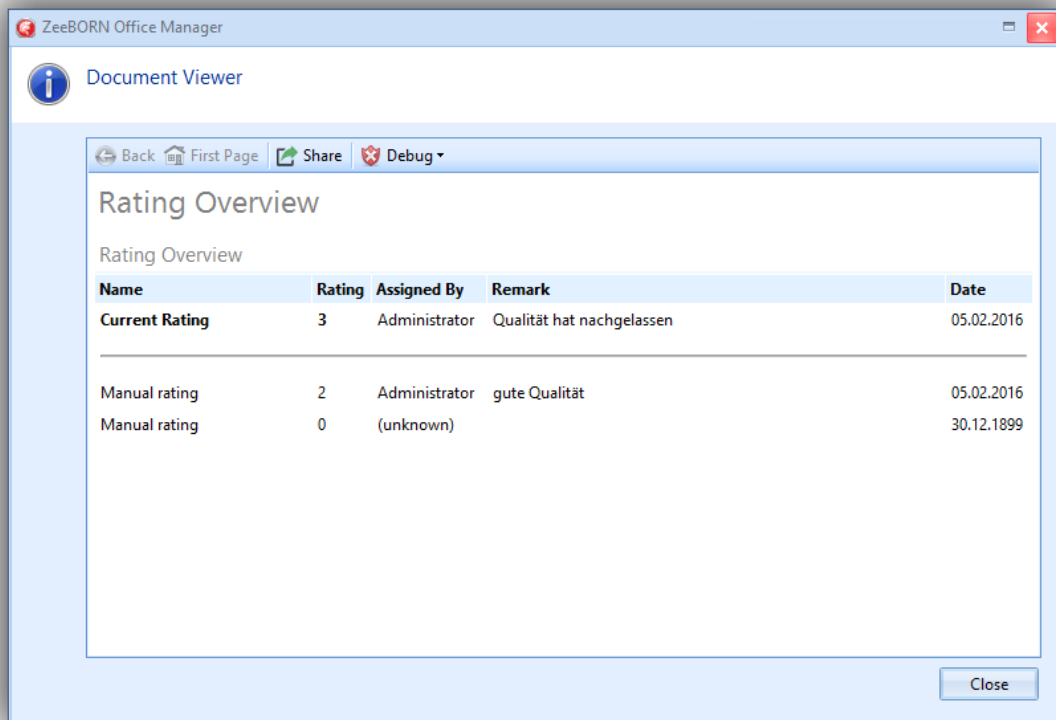


In html screen too.

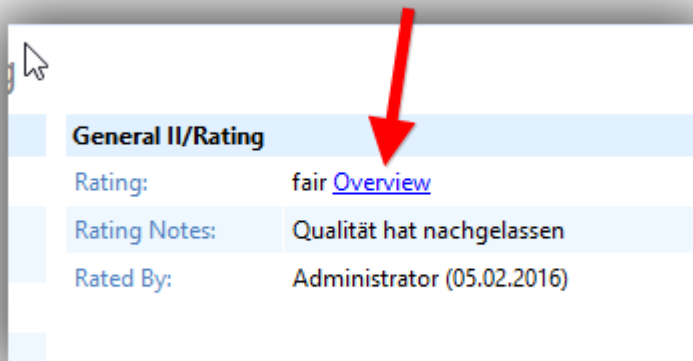


**Button 2: Rating History**

Hit button „Rating History“ for the overview of the rating:



The history is also in html screen callable.



**Usage Ratingtool**

It's also possible to use the ZeeBORN rating tool.

Pro: More people can rate and the average about all will shown for this rating. Also the crew onboard can rate in this tool.

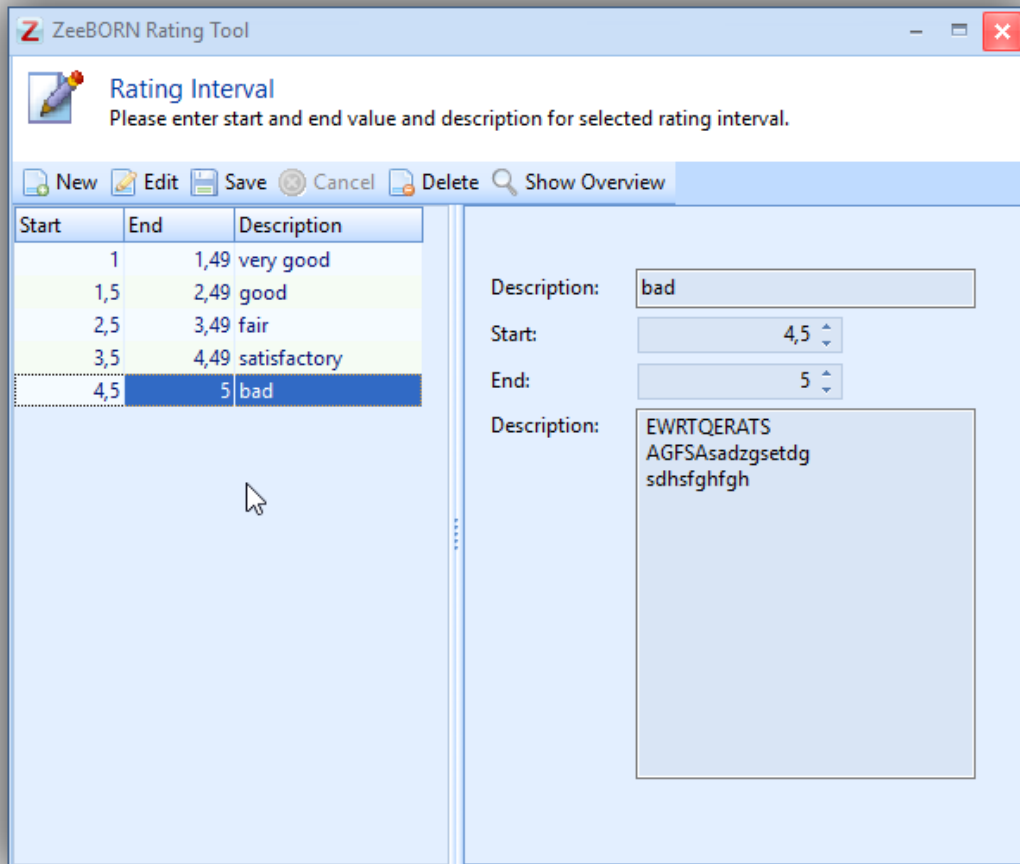
In one step all needed supplier can be rated from the whole company.

If you have the relevant right goto TAB „All modules/Administration“ and choose „rating tool“.

**Configuration Rating Interval**

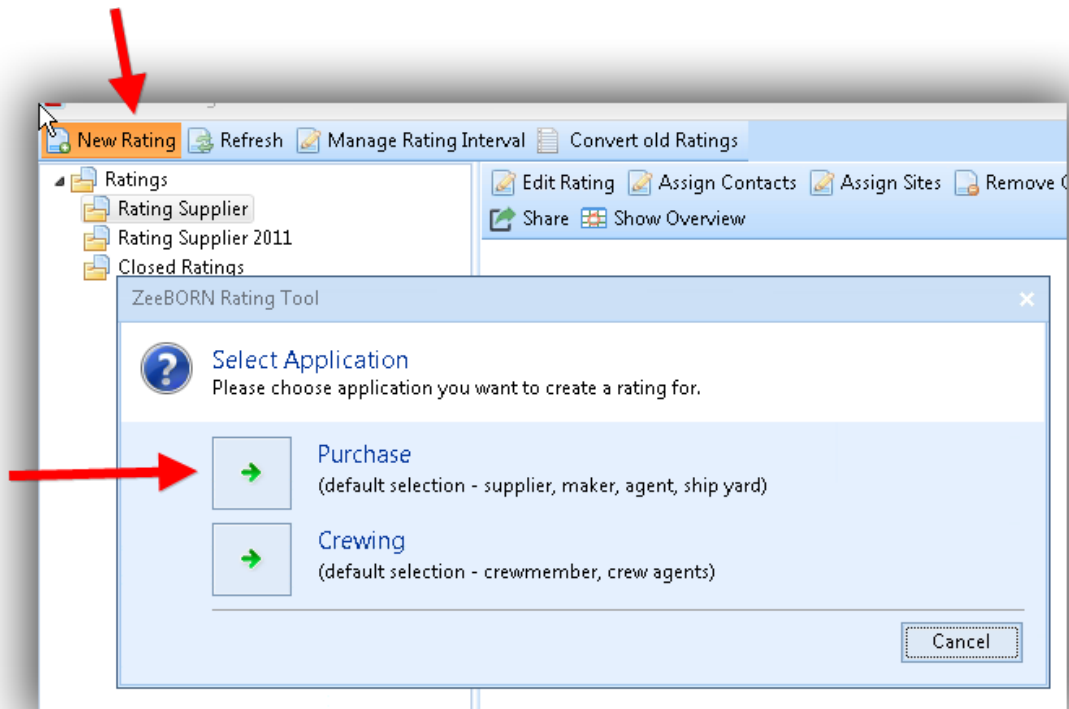
As the rating tool works with average values, in system have be stored what includes areas for which assessment. Example: 1 – 1,49 is very good

Hit „Manage Rating Interval“ and insert all average values for the valuations very good, good, fair, satisfactory and bad.

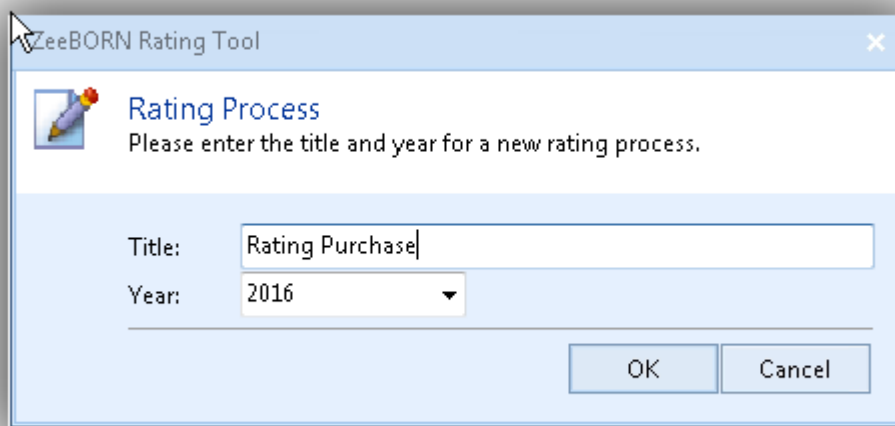
**Start Rating Process**

Hit „New Rating“ and choose „Purchase“ for rating Purchase relevant contacts.

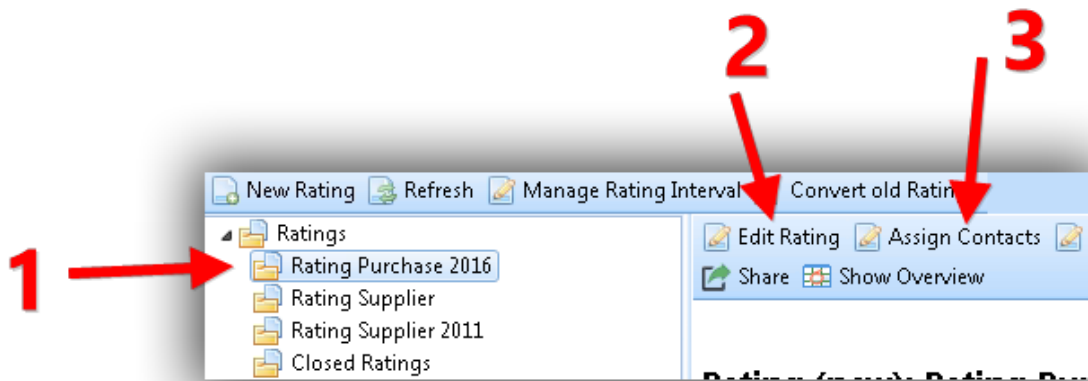




Next step insert „title“ and choose year. Confirm with „ok“.



Now the rating is visible in the tree.



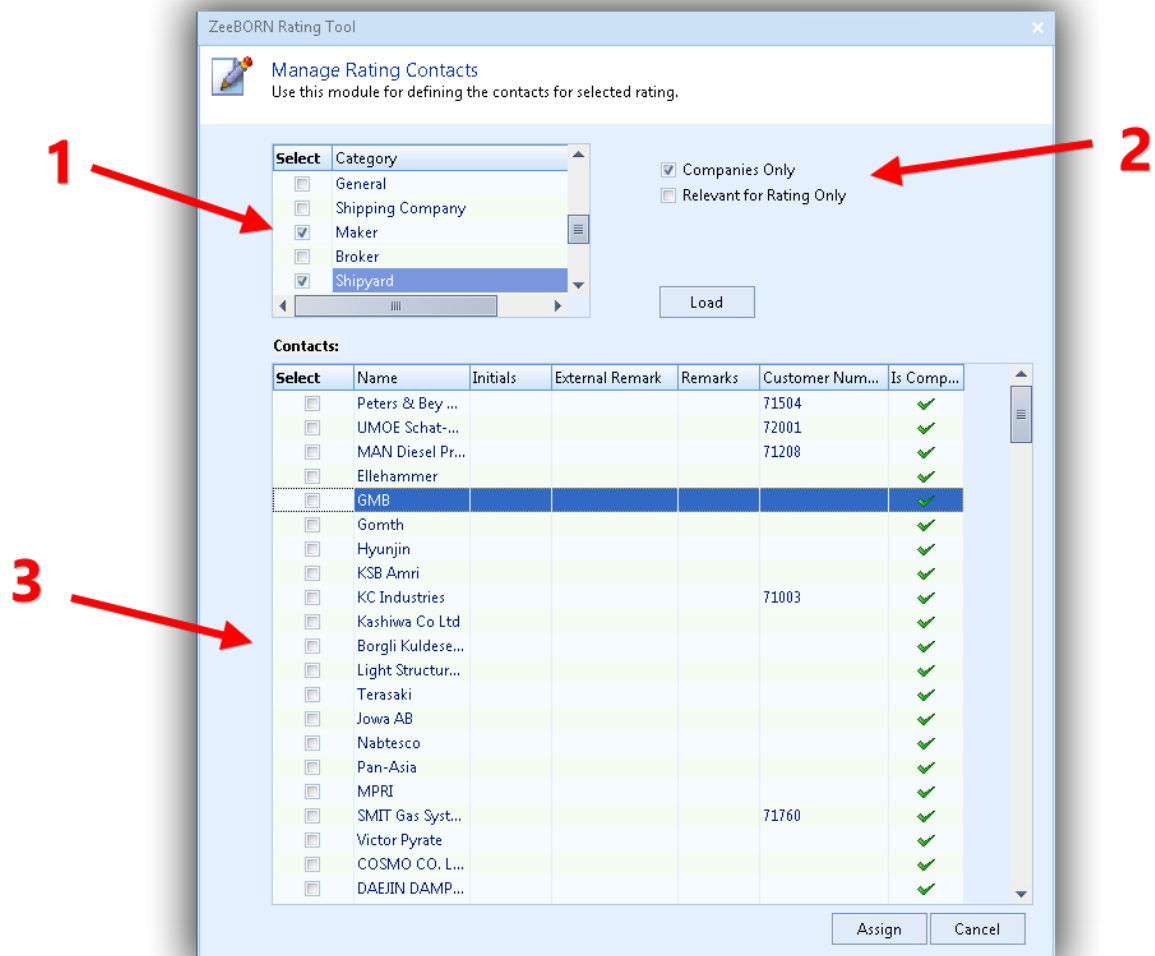
The title can be executed with „Edit Rating“ (2).

**Add contact**

To prepare the rating hit“Assign Contacts“(3).

*(1) Categories*

For Purchase relevant contact categories are already set as default (Maker, Shipyard, Supplier, Agency) (1) – other categories can be added.



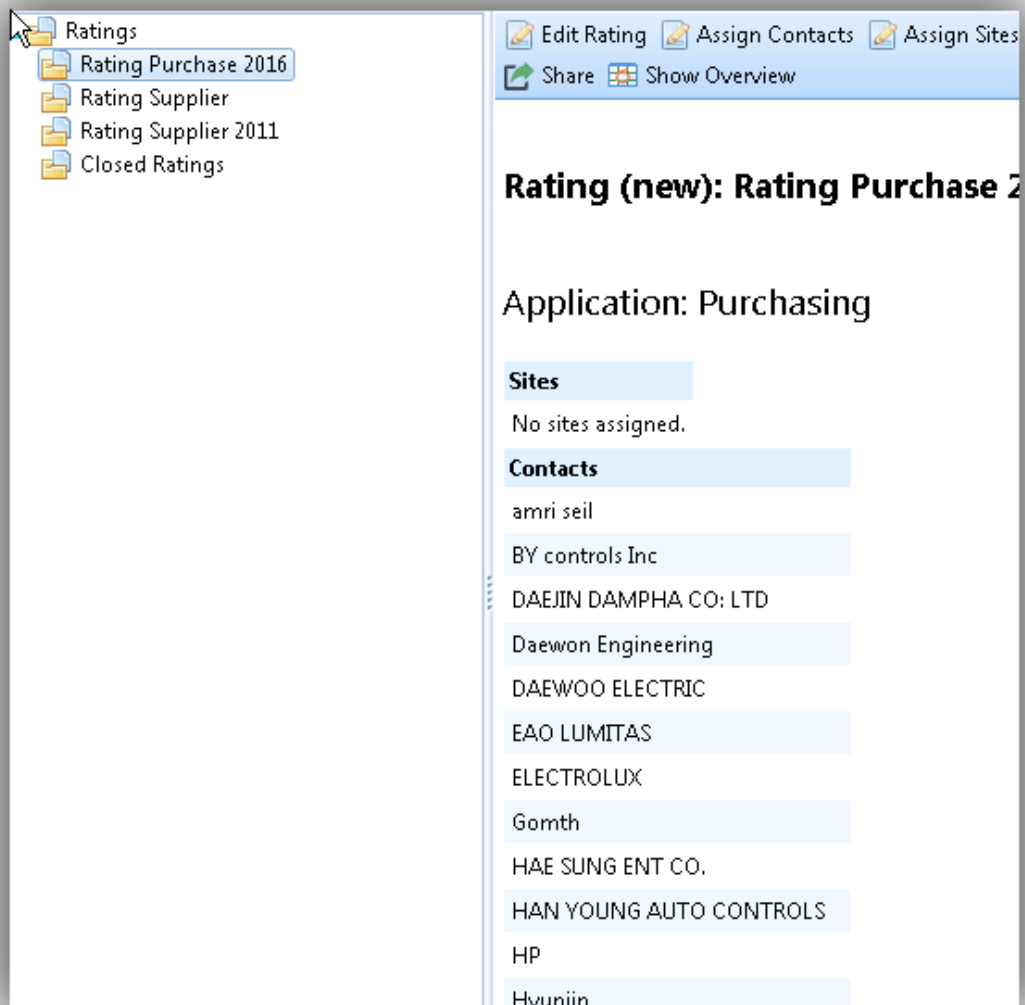
### (2) Option

There are two check boxes.

Check box „Companies only“ is set: only companies will be displayed.

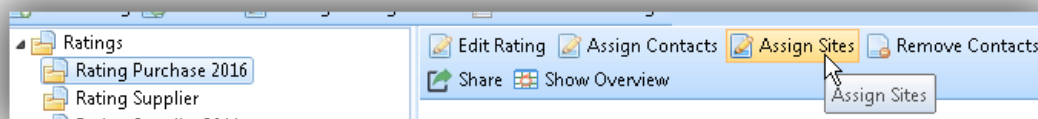
Check box „Relevant for Rating only“ is set: only contacts marked as relevant for rating will be displayed.

However you have the possibility to mark a supplier as "relevant for Rating" - so that you can select which supplier will be rated. This will make the process faster and easier during the preparation. So if you know that not all of the supplier are rated but always the same contacts, it makes sense to run this pre-selection. Now the entire supplier list (3) will display only contacts relevant for rating. You can also select contacts from this list or select the whole list. To select all contact hit with the right mouse button on „select“ and choose „select all“. In html screen of rating process the selected contacts are visible.

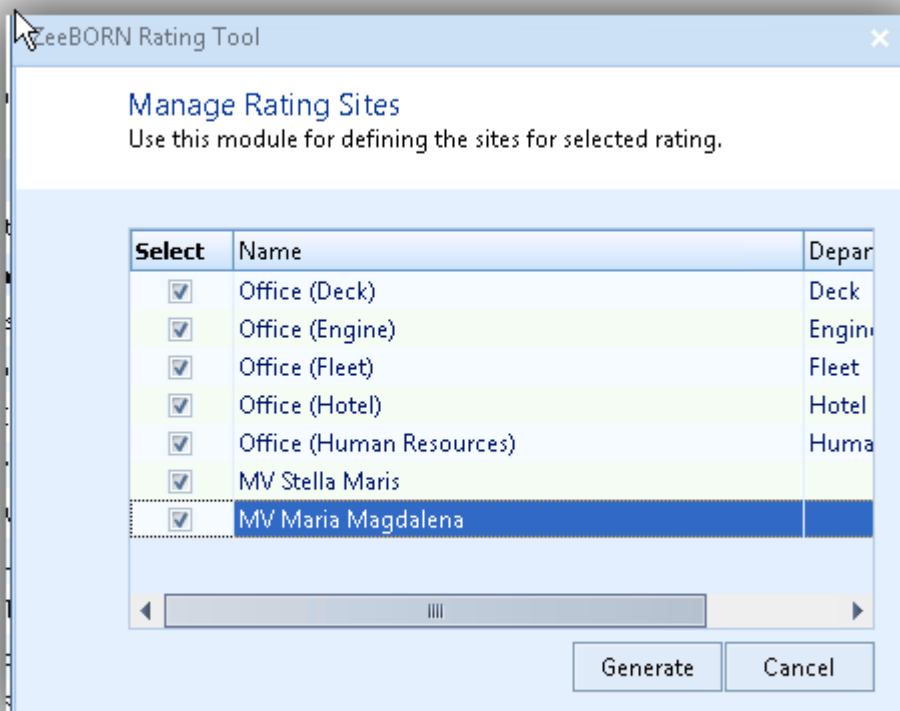


### Add rating people

Now assign all rating people. For that hit „Assign Sites“:

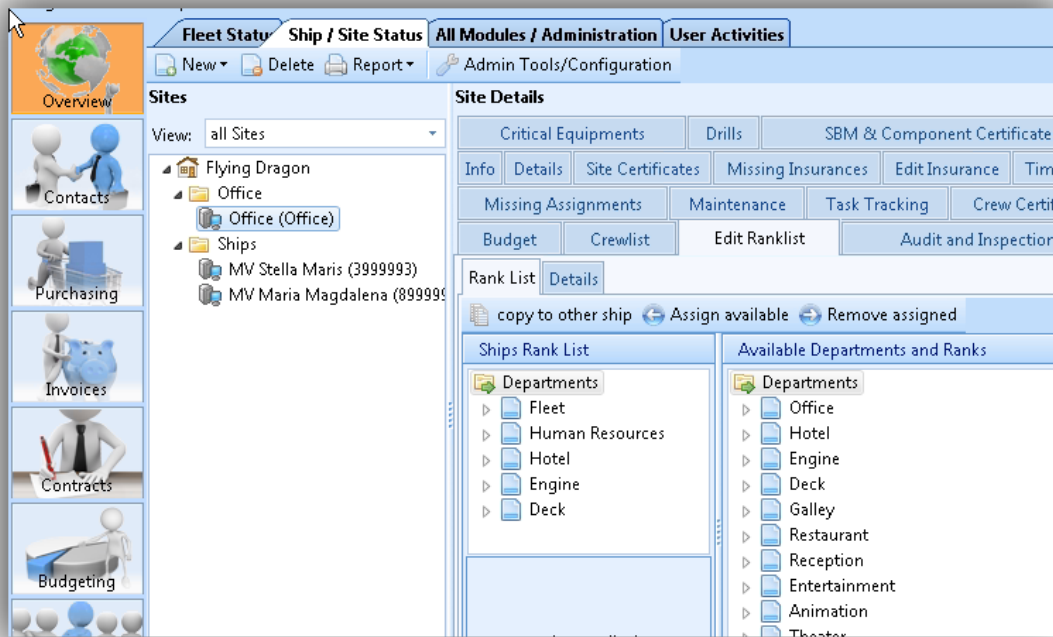


In the displayed screen all sites and departments can be chosen.

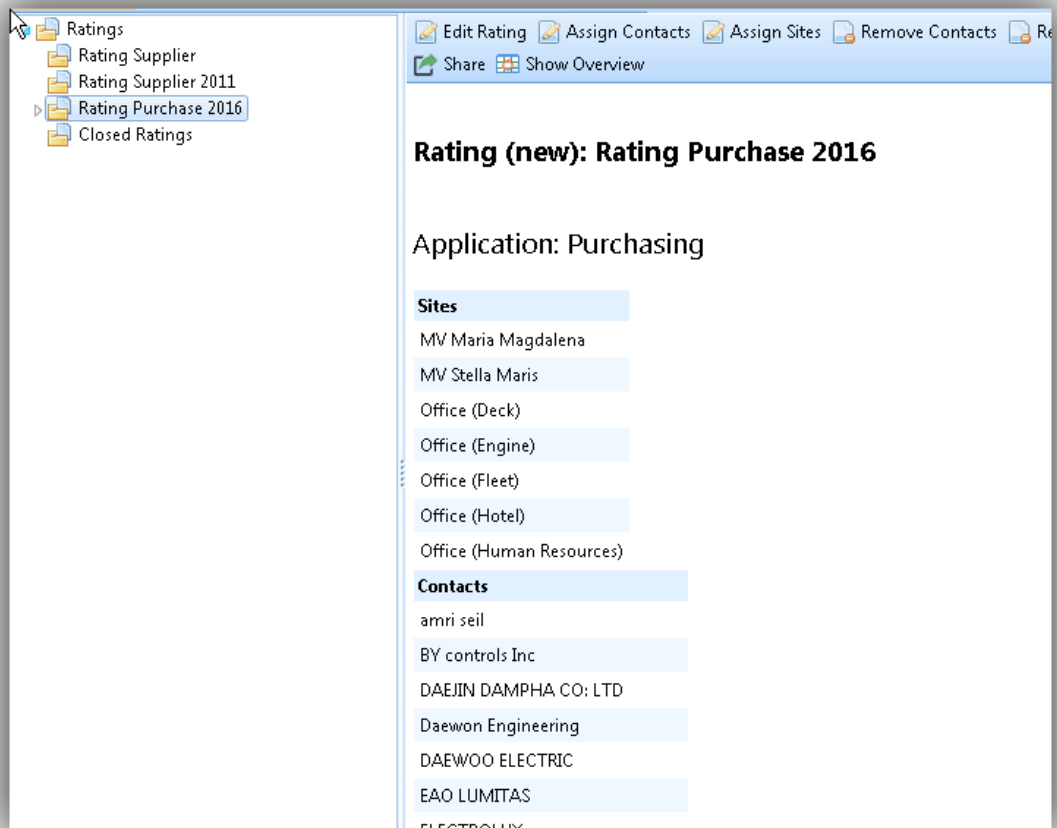


At the moment a ship is one „rating people“ and will be not separated in departments. In Office all departments from ranklist will be displayed and can be chosen.

To add a department in Office, please select Office and goto Tab „Edit Ranklist“ and assign all needed departments. (all departments has to be added in configuration.)

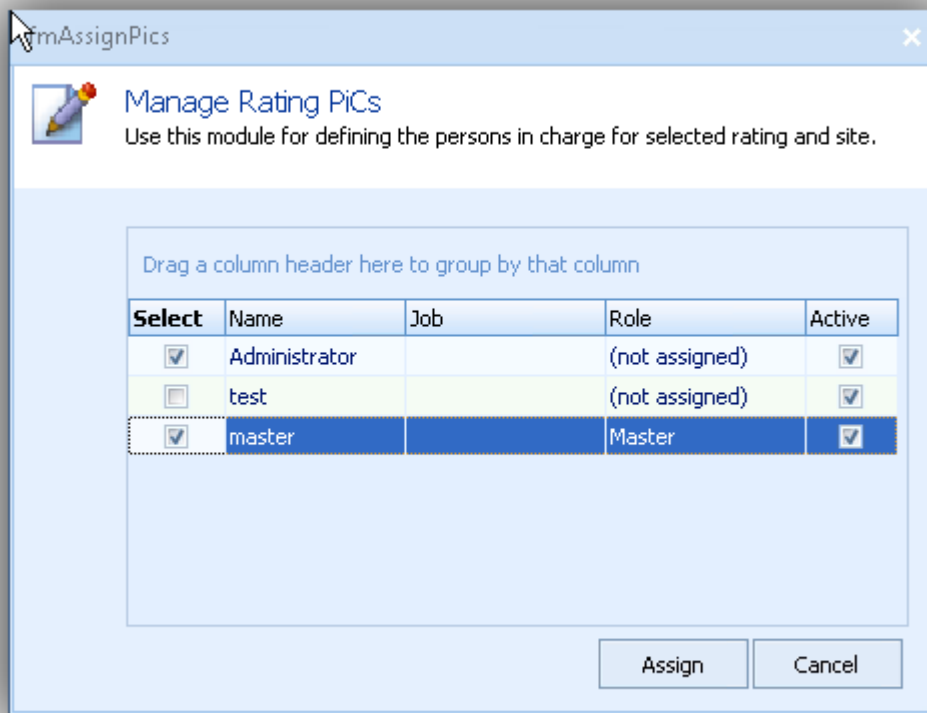


Now in html screen also the rating departments and sites are visible.

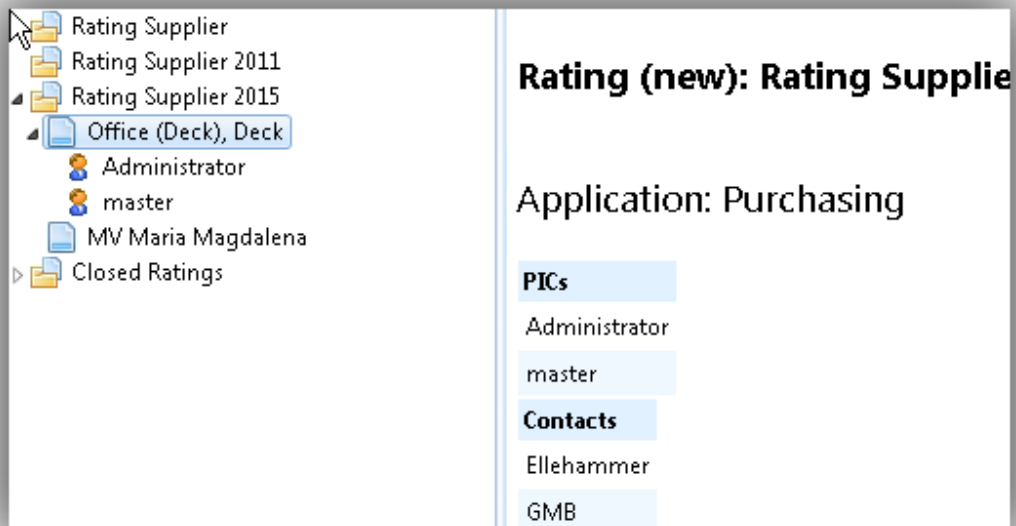


If are wrong departments or sites added, hit „Remove contacts“ or „remove sites“ to delete them from rating process.

If a special position of a department or site have to rate, please select site/department and hit „Assign PICs“.



Now the PICs are visible under correspondent department/site.

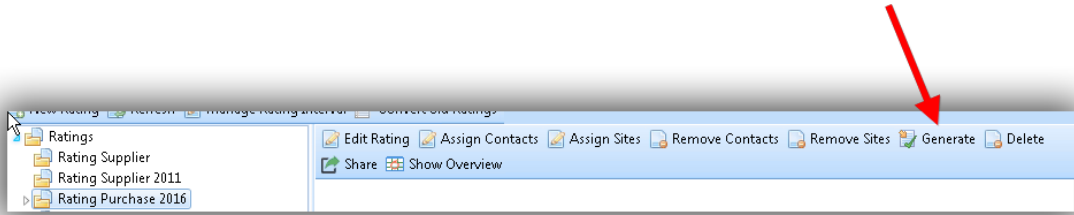


The rating process can be started, when all data correct implemented..



### Create rating process

Hit „Generate“ and the rating will be created.



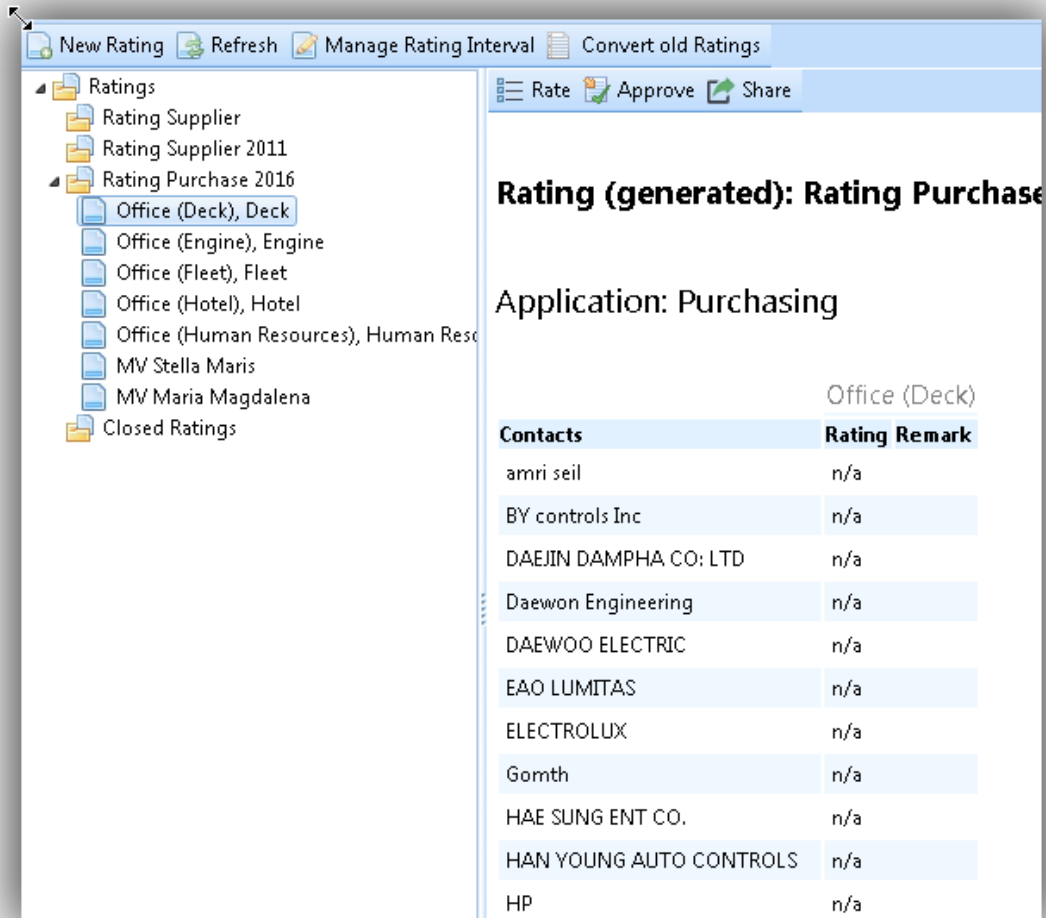
**Important: From now no more changes on data of the process(selected supplier, rating people) are possible.**

Now html screen will be displayed as a matrix.

A screenshot of a software interface displaying a rating matrix. The title is 'Rating (generated): Rating Purchase 2016'. Below the title, it says 'Application: Purchasing'. The matrix has columns for 'Office (Deck)', 'Office (Engine)', 'Office (Fleet)', 'Office (Hotel)', 'Office (Human Resources)', 'MV Stella Maris', and 'MV Mago'. The rows list various suppliers: 'amri seil', 'BY controls Inc', 'DAEJIN DAMPHA CO: LTD', 'Daewon Engineering', 'DAEWOO ELECTRIC', 'EAO LUMITAS', and 'ELECTROLUX'. Each cell in the matrix contains 'n/a'.

	Office (Deck)	Office (Engine)	Office (Fleet)	Office (Hotel)	Office (Human Resources)	MV Stella Maris	MV Mago
Contacts	Rating	Remark	Rating	Remark	Rating	Remark	Rating
amri seil	n/a		n/a		n/a		n/a
BY controls Inc	n/a		n/a		n/a		n/a
DAEJIN DAMPHA CO: LTD	n/a		n/a		n/a		n/a
Daewon Engineering	n/a		n/a		n/a		n/a
DAEWOO ELECTRIC	n/a		n/a		n/a		n/a
EAO LUMITAS	n/a		n/a		n/a		n/a
ELECTROLUX	n/a		n/a		n/a		n/a

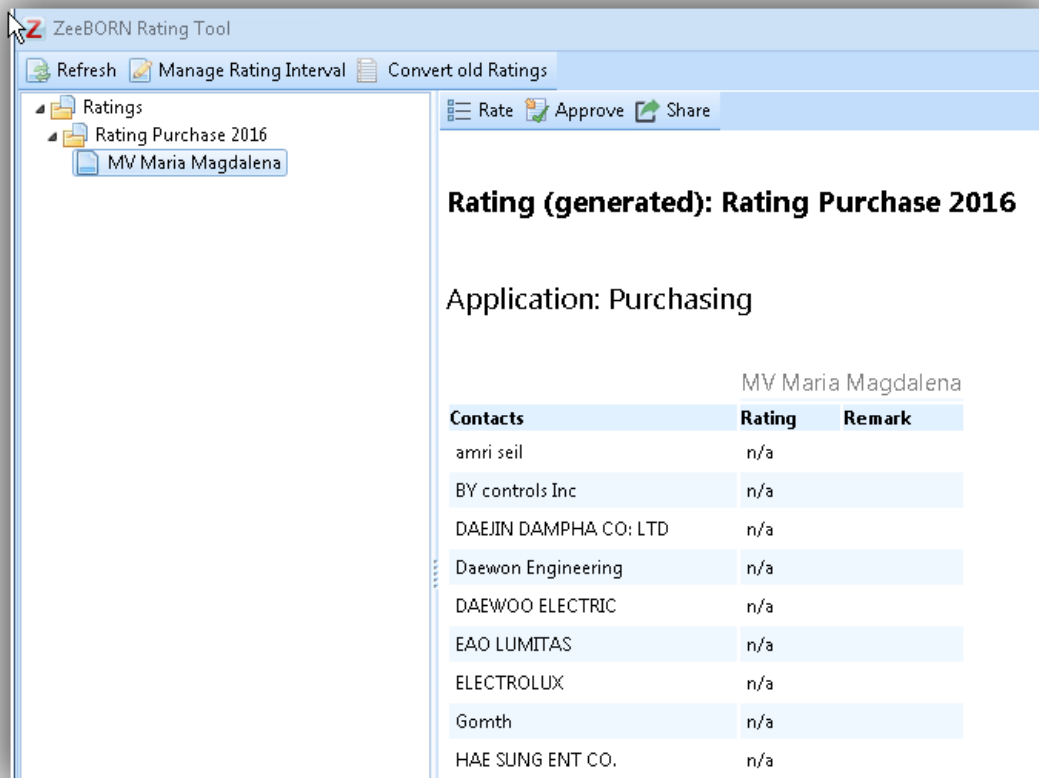
Below the overview the single rating processes from sites and departments are visible.



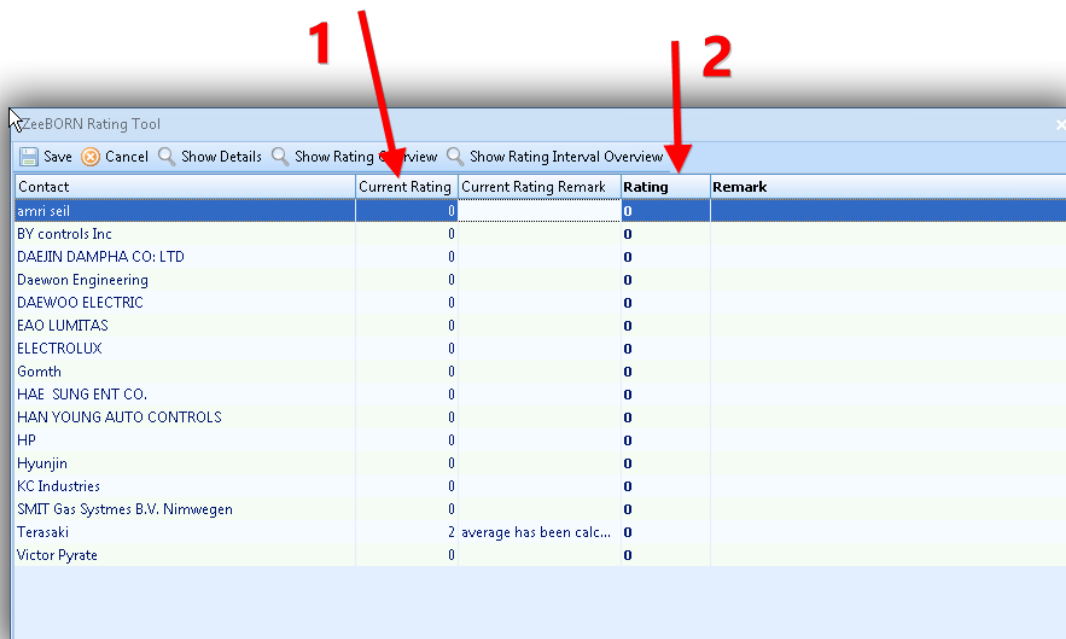
If single PICs for department/site active, these rating processes are also visible.

**Rating**

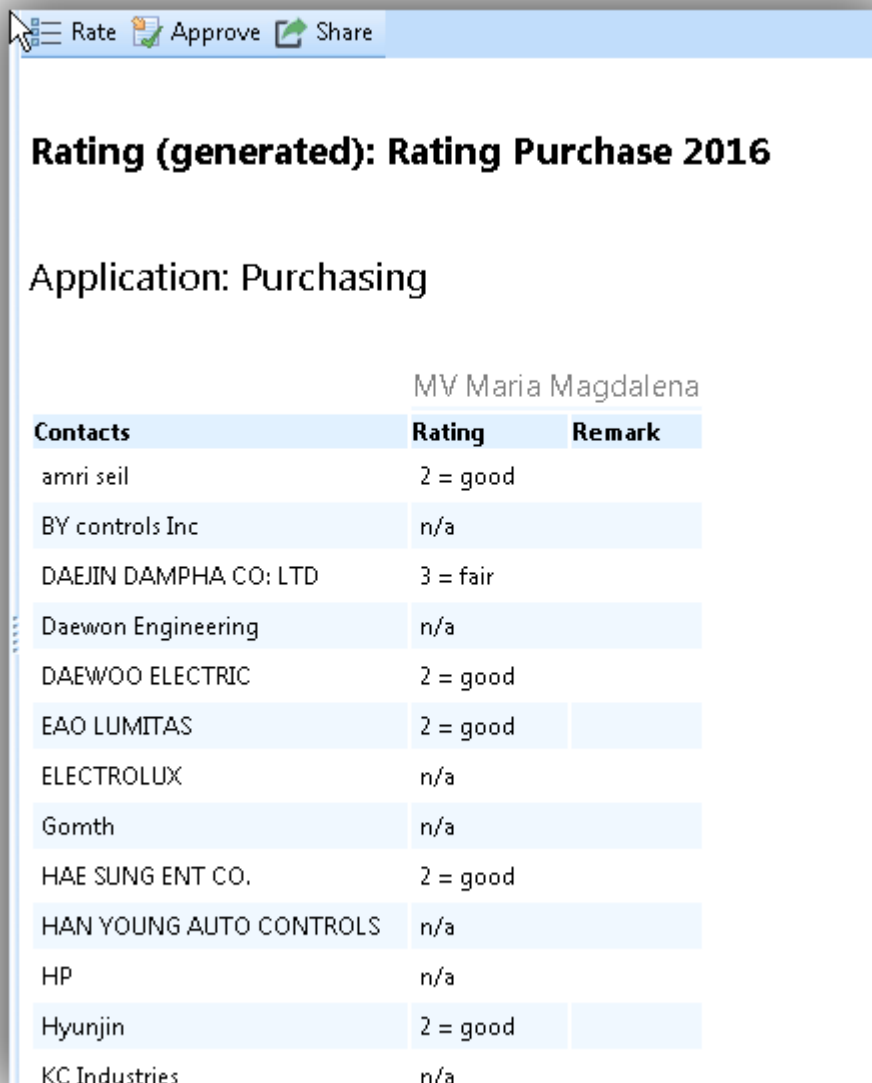
Now everybody can rate. For that all departments respectively sites start the rating tool. All departments/sites see only the requirements of the rating that is allocated to them.



Hit „Rate“ and the following form will be displayed:







MV Maria Magdalena

Contacts	Rating	Remark
amri seil	2 = good	
BY controls Inc	n/a	
DAEJIN DAMPHA CO: LTD	3 = fair	
Daewon Engineering	n/a	
DAEWOO ELECTRIC	2 = good	
EAO LUMITAS	2 = good	
ELECTROLUX	n/a	
Gomth	n/a	
HAE SUNG ENT CO.	2 = good	
HAN YOUNG AUTO CONTROLS	n/a	
HP	n/a	
Hyunjin	2 = good	
KC Industries	n/a	

The rating is completely editable as long as the rating will be not approved.  
After approving no more changes are possible.

Share

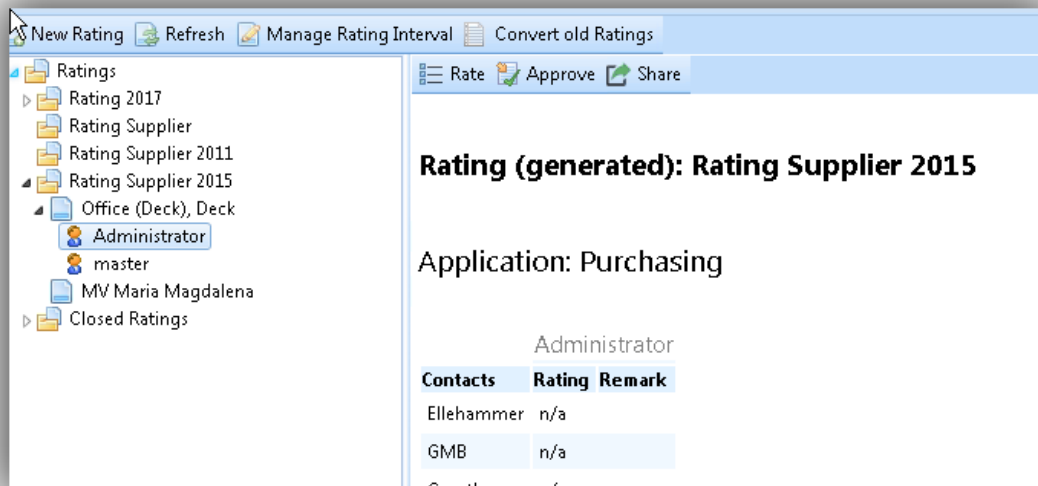
**Rating (generated): Rating Purchase 2016**

Application: Purchasing

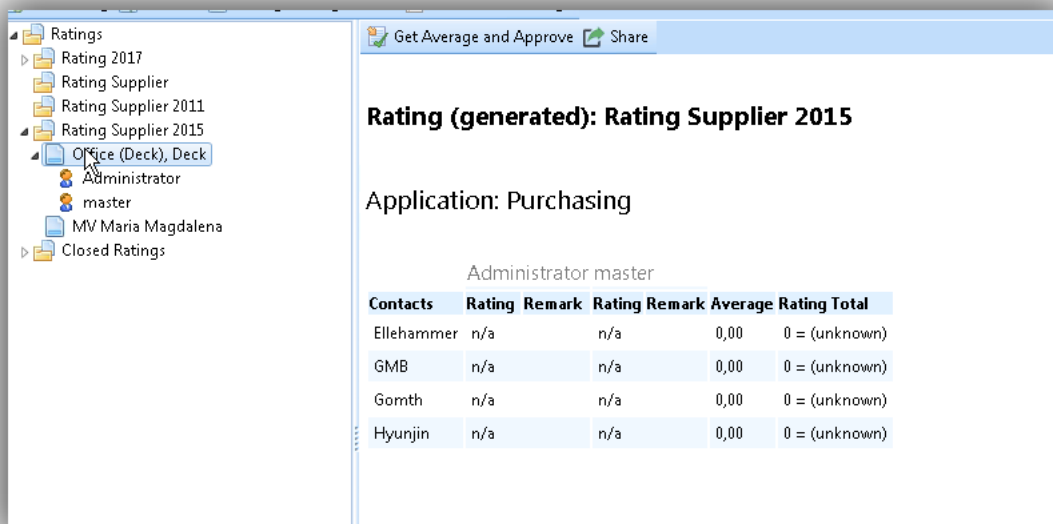
MV Maria Magdalena

Contacts	Rating	Remark
amri seil	2 = good	
BY controls Inc	n/a	
DAEJIN DAMPHA CO: LTD	3 = fair	
Daewon Engineering	n/a	
DAEWOO ELECTRIC	2 = good	
EAO LUMITAS	2 = good	
ELECTROLUX	n/a	
Gomth	n/a	
HAE SUNG ENT CO.	2 = good	

If there are ratings from PICs existing, is the same procedure.



The rating from department/site is a summary of all PIC ratings.



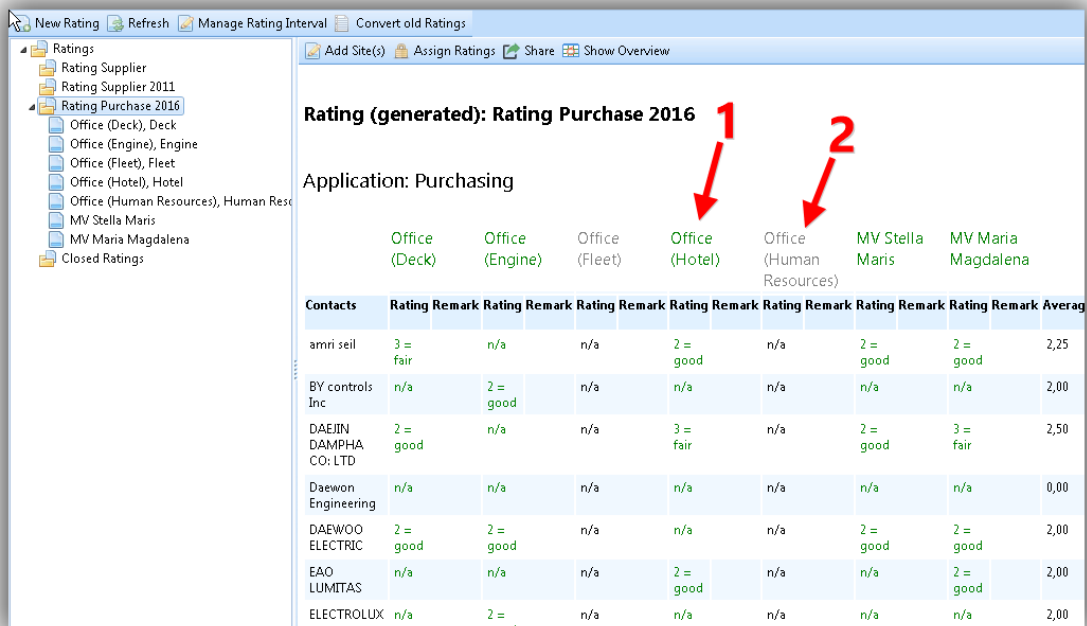
The summary will be created, when all ratings of PICs are approved.

### Assign Ratings to Contacts

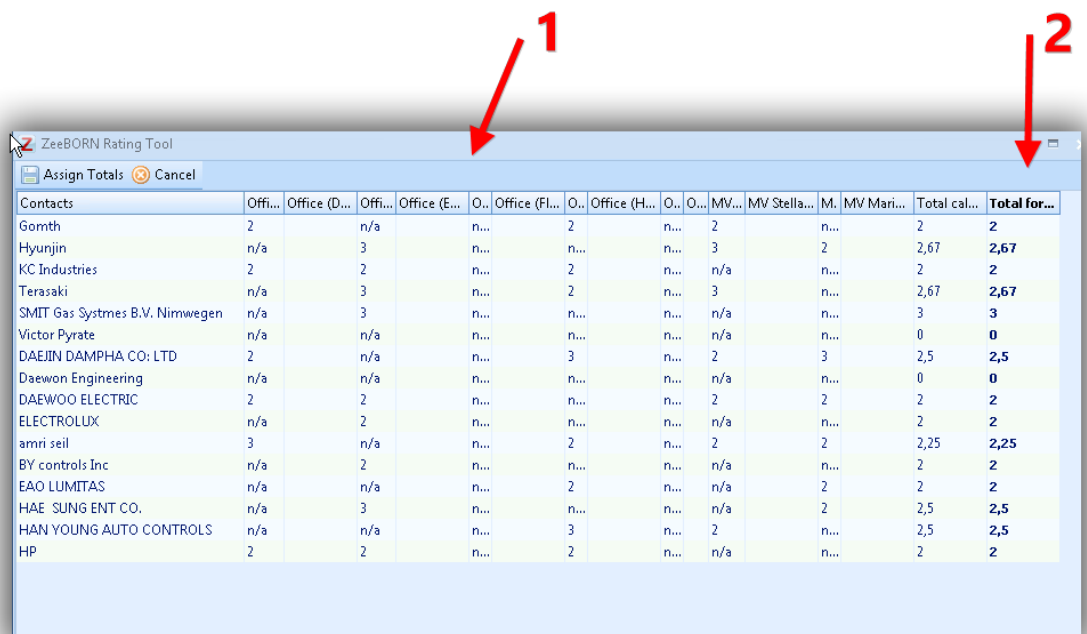
As all ratings of all departments and sites are reached in Office, the final rating process can be done.

Start the rating process in office. There you can see all approved(1) or open(2) ratings.

We have to change Icons in tree, as at the moment both (approved and open) have the same icon.



Hit „Assign Ratings“ and the following form will be displayed.  
**Note: You can start this progress only, if all ratings are approved.**



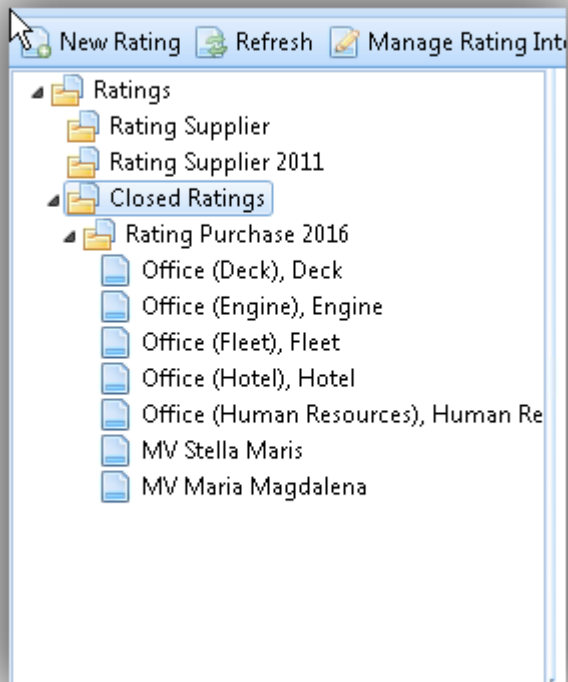
Now all given Ratings (1) are visible and in total (2) the summary of the ratings will be displayed..



**Important: From the summary in total the value can be edited, if there a rating summaries not will be displayed the truth.**

Hit „Assign Totals“ and all value will be overtaken to the contacts. All summaries will be changed in marks( 0-5) as defined in configuration.

Now the rating process is finished and the rating will be moved to „Closed Ratings“:



In rating history of contact all data will be displayed, the summary and the single ratings of one rating.

Rating Overview

Name	Rating	Assigned By	Re
<b>Current Rating</b>	<b>2,67</b>		
Office (Deck) Deck	0	(unknown)	
Office (Engine) Engine	3	(unknown)	
Office (Fleet) Fleet		(unknown)	
Office (Hotel) Hotel	0	(unknown)	
Office (Human Resources) Human Resources		(unknown)	
MV Stella Maris	3	(unknown)	
MV Maria Magdalena	2	(unknown)	

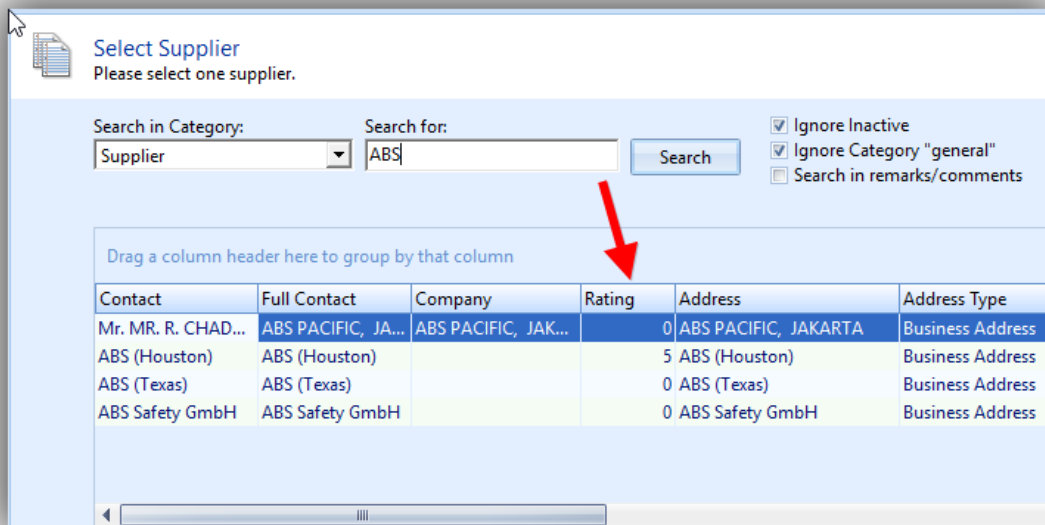
### Usage of Ratings

The rating of supplier will be displayed in RfQ area of Purchase as it can be a fact in decision process.

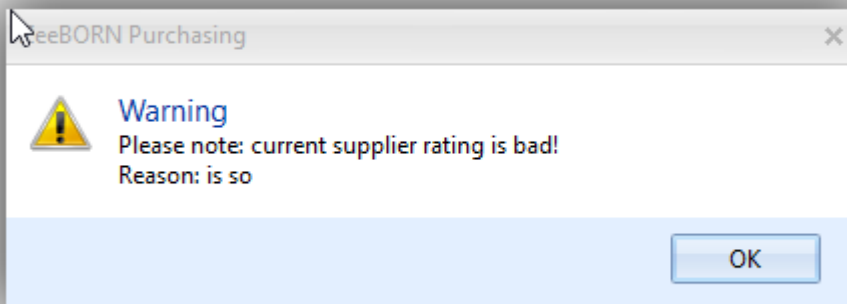
Select Supplier(s) for test RfQ-RUW-16-001 - Al Ruwais (all prices are in EUR)

Items				ZeeBORN GmbH Attn. Dana Sill Lärchenweg 1a 14547 Fichtenwalde Germany +49 33206 5838-5 dana.sill@zeeborn.net Rating: 2				ZeeBORN GmbH Attn. Fred A 1a 14547 Fichtenwald Rating: 2			
Delivery Date											
Position	Article	Additional	Remarks	Qty. required	Qty. offered	Qty. selected	Single Price (incl. Discount)	Remarks	Select	Qty. offered	Qty. selected
1	item1			1 pcs	0	a/a	not available			1 pcs	<input type="text"/>
8	item2			1 pcs	0	a/a	not available			1 pcs	<input type="text" value="1"/>
2	item3			1 pcs	1 pcs	<input type="text" value="1"/>	10,00		<input checked="" type="checkbox"/>	1 pcs	<input type="text" value="1"/>
3	item4			1 pcs	1 pcs	<input type="text" value="1"/>	10,00		<input checked="" type="checkbox"/>	1 pcs	<input type="text" value="1"/>
4	Acetylen Cyl. (C2H2)	Vendor Reference: 710 905026 Internal No: 999 000174	<b>External Remark:</b> 1cyl = 40 kg Gas welding, cutting or	1 cyl	1 cyl	<input type="text" value="1"/>	10,00		<input checked="" type="checkbox"/>	1 cyl	<input type="text" value="1"/>

In the selection area in RQ / PO the rating is also visible.



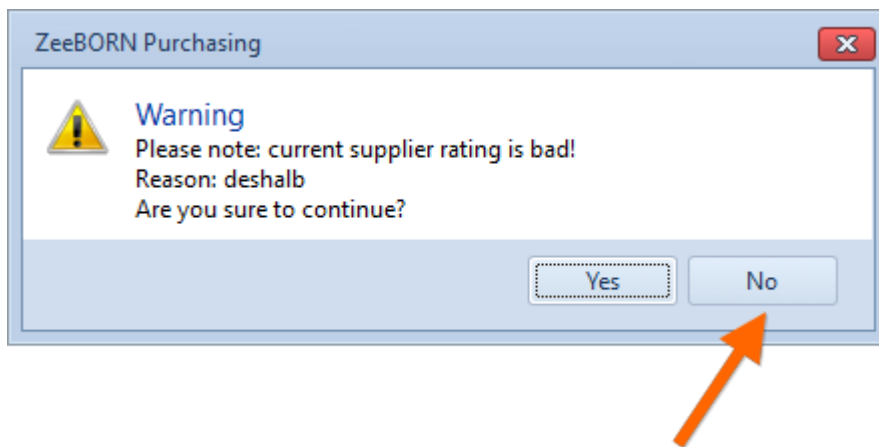
A warning will be displayed, if a selected contact has a rating > 4.



However the supplier can be selected.

### 10.10.5. Bad Rating

You are now able to interrupt the process of assigning supplier, if the rating of the selected supplier is bad.



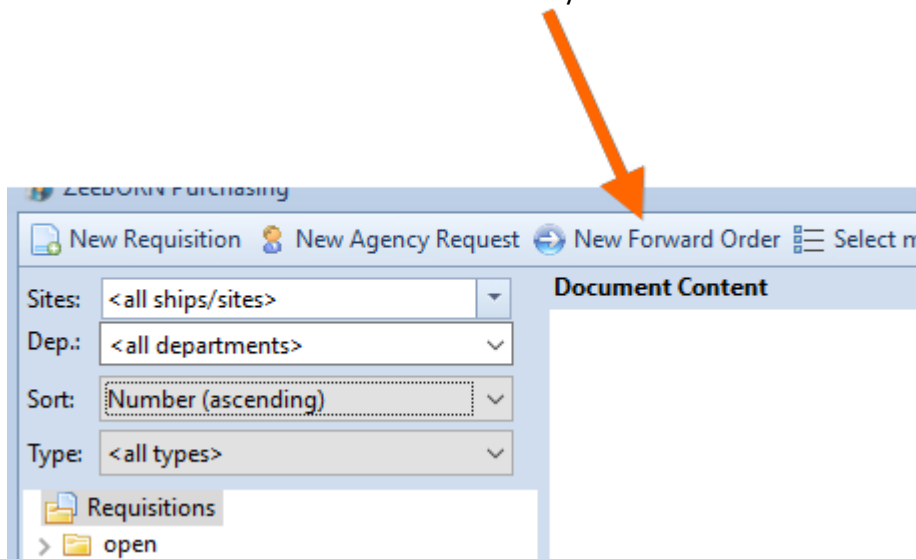
Please note: If you want to create RfQ from approved RQ and all selected suppliers have rating bad and all assignments were interrupted, the RfQ will be created independently from that. You have than to assign new supplier directly to the new created RfQ.

### 10.10.6 Forward Orders

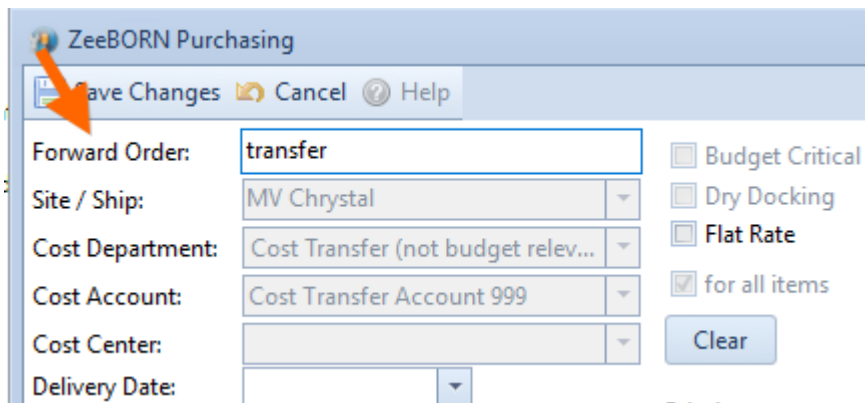
You are now able to manage forward orders in the ZeeBORN Purchase module.

#### Generate

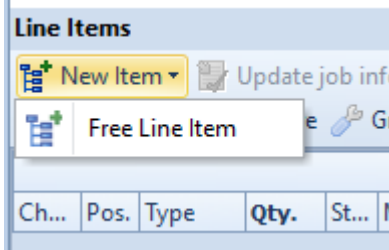
We implemented a new button "New Forward Order". Button is visible in office only. Forward orders are visible and receivable in office only.



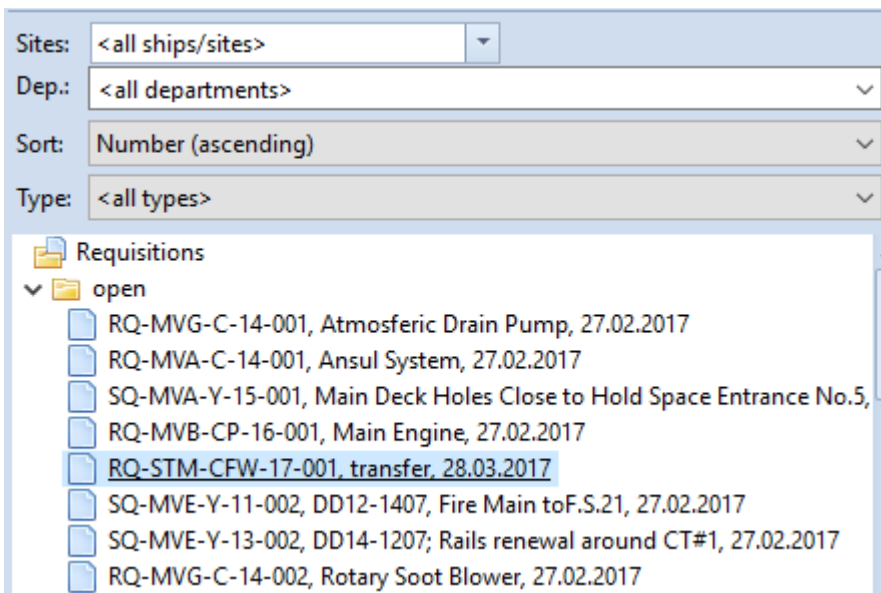
The TAN will contain a **FW** to identify the requisition as forward order. TAN will be built depending on your company rules, for instance: RQ-FW-031-17-001 or RQ-STM-CFW-17-001  
 In the edit form, you see the caption “Forward Order” instead of “Requisition”:



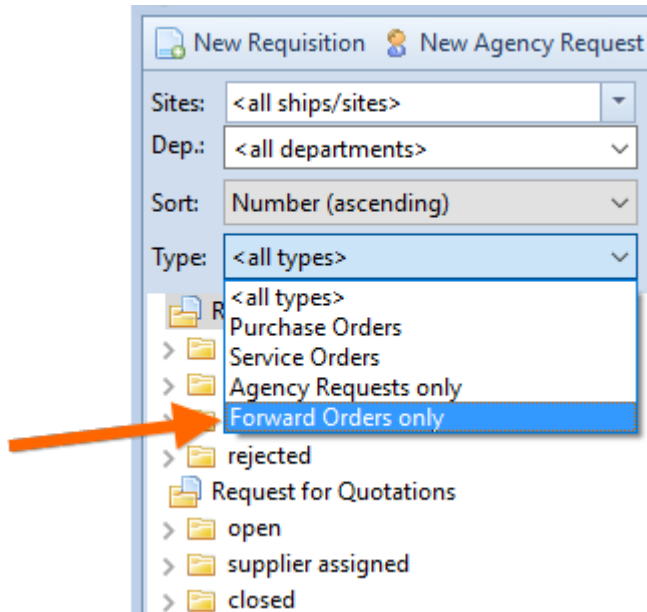
You can only assign free line items to a forward order.



The forward orders are underlined in the tree.



You can choose “forward orders only” in the type selection box:



In this case, only forward orders will be displayed in the tree. Type selection “Forward orders” only available in office. Invoices can be assigned to forward orders.

### Reports

In the following Reports the information, that a purchase order is a forward order, is available:

#### Purchase

- Open POs / Provision Report
- Show Overview

#### Budget

- Reporting - Load Bookings

### 10.10.7 Split POs - Booking Date

Sometimes it is necessary to manage different booking dates for one purchase order. In the system, you can only manage one booking date per purchase order. So, we implemented the possibility to split an already sent purchase order into two purchase orders, which relate to each other – without involving the supplier.

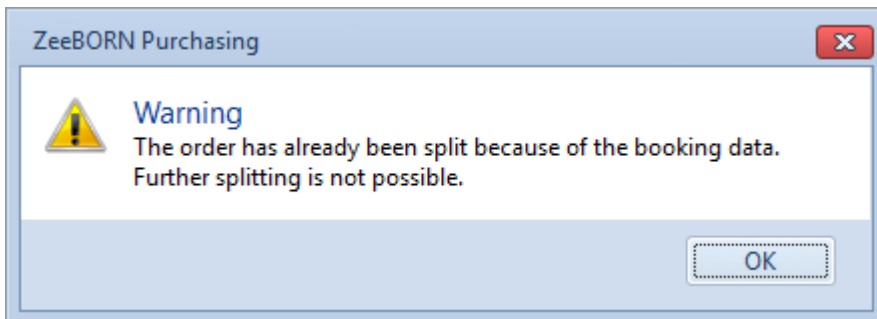
## User Rights

Sent PO: Purchasing » PO (Purchase Order) » Sent PO » Update PO » Split PO (Booking Dates)  
Closed PO: Purchasing » PO (Purchase Order) » Closed PO » Update PO » Split PO (Booking Dates)

## Split

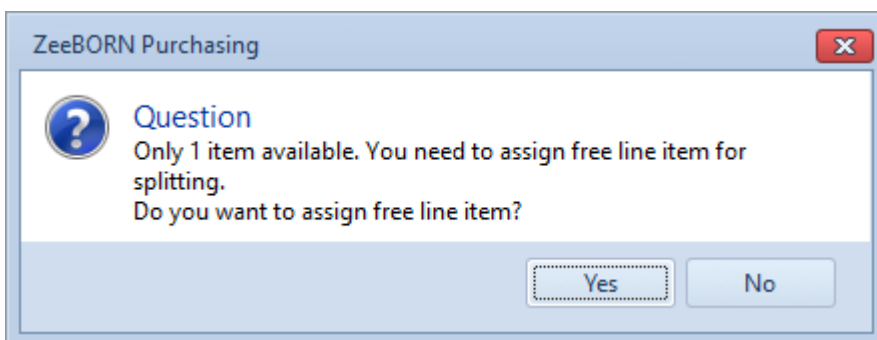
The button „Split PO (Booking Dates)“ is available under the button „Update“.

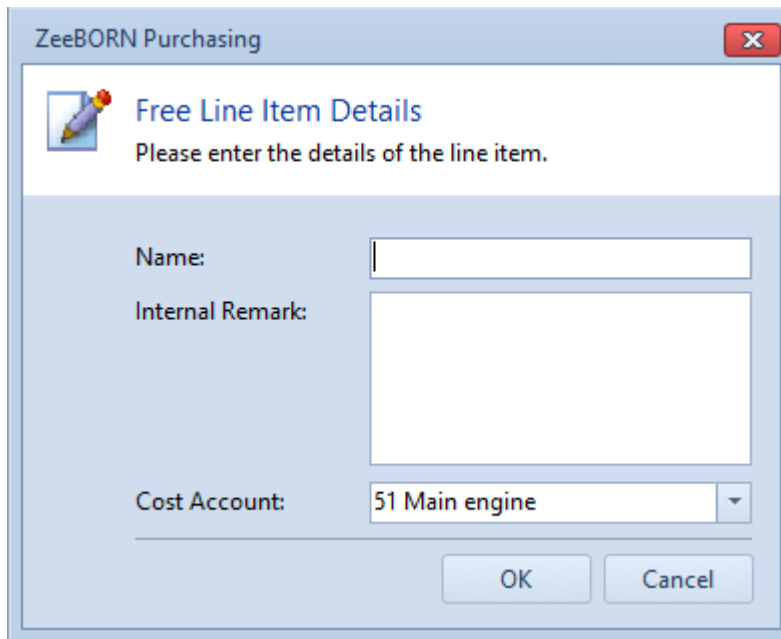
To split a PO is only possible if the PO has not already been split to manage two booking dates. This means that for one sent PO you can manage only two booking dates as a maximum.



In case of only one item available in the PO, so you need to assign a free line item before splitting.

The system checks this process and offers a form to create a free line item.





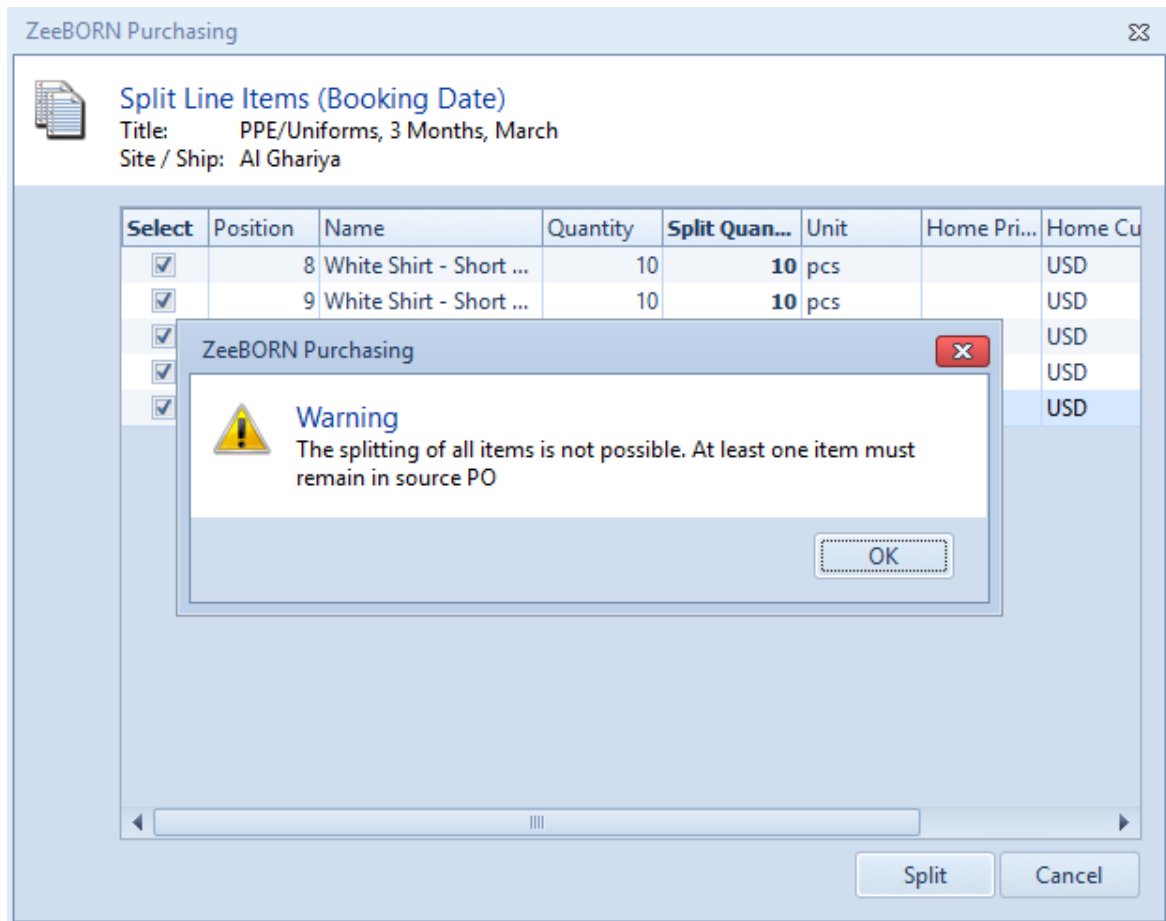
The screenshot shows a dialog box titled "ZeeBORN Purchasing" with a close button (X) in the top right corner. The main title is "Free Line Item Details" with a pencil icon. Below the title is the instruction "Please enter the details of the line item." The form contains three fields: "Name:" with a text input field, "Internal Remark:" with a larger text area, and "Cost Account:" with a dropdown menu currently showing "51 Main engine". At the bottom, there are "OK" and "Cancel" buttons.

The following applies: If the source PO was defined than there is only one cost account so the field cost account is to be blocked by free line item and the origin cost account will be accepted.

Now it is possible that the new free line item can be split.

When splitting so one item has to remain in source PO – contrary to the normal procedure of splitting – all items can be split there.





After splitting the following changes have been made:

- A new PO with the split-items will be created
- The new PO and source PO will be marked internally so it is possible to recognize afterwards that the PO was split because of booking dates
- An internal remark will be deposit for both PO

**Purchase Order PO-STM-CP-17-002-X**  
**Main Engine**  
**MV Stella Maris - 3999993**  
**Expected Delivery Date:**

Booking Date: 10.07.2017

**supplier:**

[ZeeBORN GmbH](#)  
[Lärchenweg 1a](#)  
[14547 Fichtenwalde](#)  
[Germany](#)  
[+49 \(33206\) 62867](#)  
[info@zeeborn.net](#)

**deliver to:**

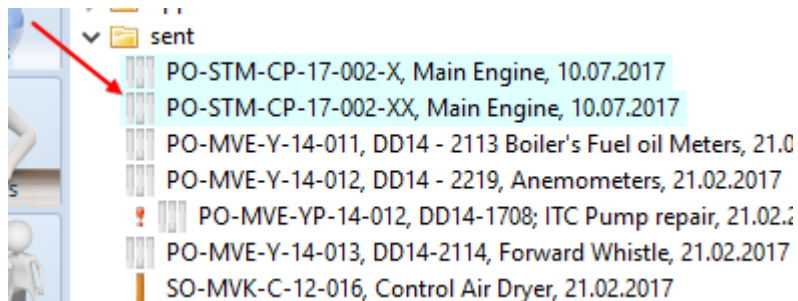
**invoice to:**

Maris  
 Schiffsbetriebsgesellschaft  
 mbH & Co.  
 Baum 1  
 12345 Fichtenwalde  
 Germany

**Internal Remarks:**

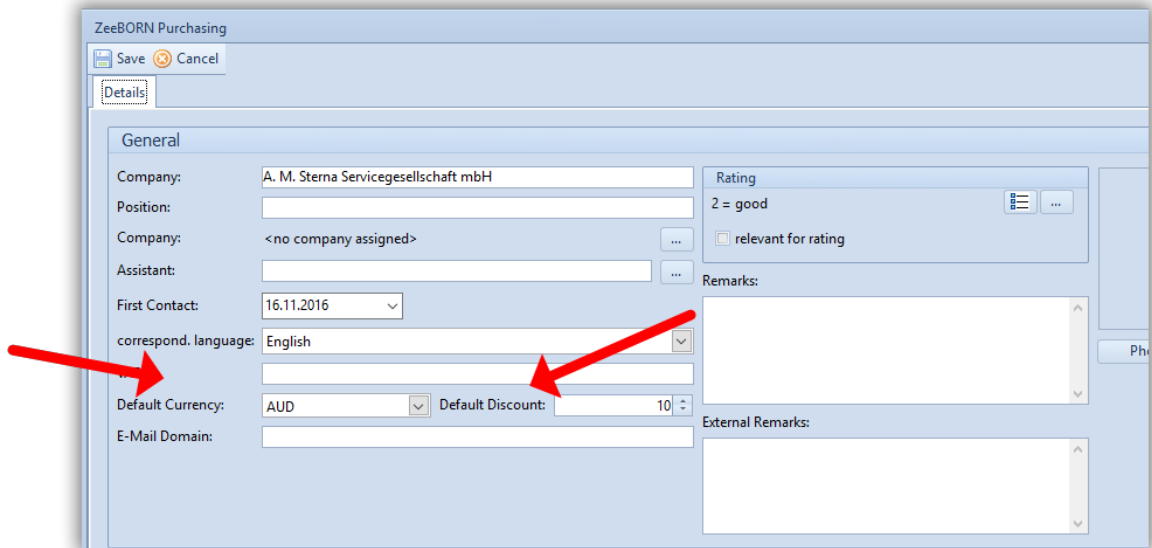
splitted to: PO-STM-CP-17-002-XX (Split Booking Dates)  
 Transmitted Items:  
 1 Lapping tool (A)

- In both PO the TAN will be marked (source-PO TAN-X, new PO TAN-XX)
- A split PO will be displayed in color in the tree:

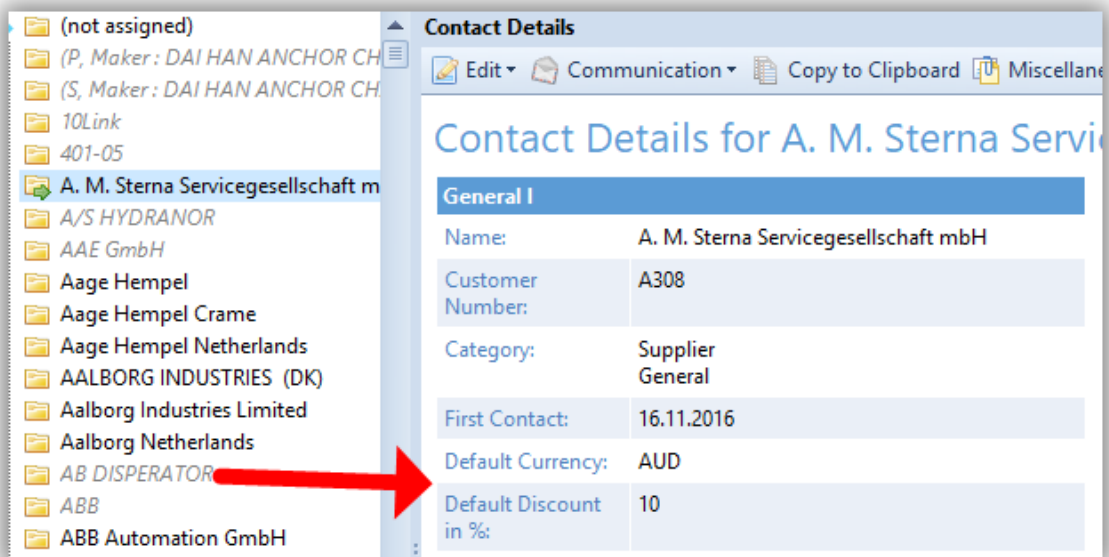


## 10.10.8 Default Currency and Discount per Supplier

### Default Currency and Discount per Supplier



Per supplier you are now able to assign a default currency and default discount in percent.



The values are shown in the HTML overview.

## Requisition

The screenshot shows a software interface for purchasing. At the top left, there's a 'Supplier Address' field with a dropdown menu showing 'A. M. Sterna Servicegesellschaft mbH' and its details. To the right, there's a 'Prices' section with 'Manual Price' options. Below that is a 'Line Items' table.

General															Original		Estimated					
P.	T.	Q...	S.	M	U...	Na...	Int...	Sta...	Inte...	Externa...	Cost ...	Type D...	Co...	M..	O...	Lan...	Custo...	Price	Cu...	Total	Use	
1	s...	4000	5...	0	0	ltr	Navi...	open			Lubrica...	ME cyli...						20,76	AUD	0	83.040,00	
2	s...	1000	1...	0	0	ltr	Navi...	open			Lubrica...	AE cran...						20,76	AUD	0	20.760,00	

Once you select the supplier, the default values will be overtaken in the requisition. Any existing prices will be converted (expected manual prices).

**Quotation**

Currency and Discount will be stored in quotation.

**Open Purchase Order**

If you select the supplier, the default values will be overtaken in the purchase order. Any existing prices will be converted (expected manual prices).

**Please note: This will not happen if you change a supplier after sending the Purchase Order via Update -> Change Supplier. Here you have to update the prices and currencies manually.**

# 11 Planned Maintenance

---

The Maintenance module is divided into three main parts:

**Components** - Here you have access to all component data and relevant data like planned and executed maintenance jobs and linked spare parts.

**Maintenance** - Here you have access to all features relevant for planning and reporting maintenance jobs.

**Stock Control** - Here you have access to all stock locations and the articles stored there.

## 11.1 Crewing

The ZeeBORN Crewing module is the main module for managing your crew. The Crewing is divided into different areas.

### 11.1.1 Configuration

For the module Crewing the following general configurations are required:

- Job Names
- Departments
- Airports
- Currencies
- Nationalities
- Countries
- Ports

In addition, the following points can be configured for the module.

#### 11.1.1.1 Pet Types and Requirements

In the configuration can be defined which pet types are allowed. There are also documents collected. In addition, all required documents for each pet type are determined.

#### 11.1.1.2 Special Request Categories

A selection of special needs is already included in the system. All other requirements can be defined.

### 11.1.1.3 Category

It is determined whether this category applies only to persons or also for companies.

### 11.1.1.4 E-Mail Templates

If standard mails are sent to crew, therefore templates can be created.

## 11.1.2 Managing Crew Members

Use this area for managing crew members with their data, such as contracts, assignments, master data etc..

### 11.1.2.1 Certificates

In the configuration all certificates are merged into groups. The screen will be displayed in these groups. In the Certificates Overview are displayed the needed certificates for this position. Preferred Ships/Fleet gives the possibility to check the certificates against single Fleets or ships. With this preparation the assignment of the employee can be prepared.

### 11.1.2.2 Additional

The nearest internationally and national airport can be given. The preferred airport can be set as default. At the moment the following information are still administered, in addition:

- union
- Social security number
- Nearest railway station
- Special skills
- Religion
- Reservist

### 11.1.2.3 Status

The status details are indicated for every employee to get a fast overview.

### 11.1.2.4 Bank Details

For every employee in any order bank data can be inserted. As soon as with the Payroll is worked, one banking account has to be set as default.

### 11.1.2.5 Assignments

For the range of the contract all assignments have to be completely. Assignments outside of the range of contracts can be inserted; nevertheless, these are submitted of no control routine.

### 11.1.2.6 Next Of Kin

All next of kin of the employee can be inserted. One of these contacts is to mark as an Immediate Contact. In addition, the marital status, date of married and the number of children are inserted here.

### 11.1.2.7 Contracts

Here all contracts of the employee are administered. Exclusively all contracts signed by both sides are inserted. Every contract can be inserted with a suitable Template or freely defined.

### 11.1.2.8 Training

It can capture all the training. This is a distinction between the record of training and the complete organization of a training session. Organized trainings are centralized and every employee can then be invited to these trainings. Once he has completed a training session, it will be covered even if the participation was not successful.

### 11.1.2.9 Earnings and Deductions

For each employee all Earnings and Deduction can be inserted directly in the data sheet of the employee.

#### 11.1.2.1 Overtime

The overtime can be entered for every employee directly in his data sheet.

#### 11.1.2.1 Performance Reports

All performance report can be inserted. All appraisals to assignments as well as appraisals by other companies or after an affected cycle can be inserted.

#### 11.1.2.1 Master Data

For each crew member all general information can be given in details. First name, given name and date of birth must be given for every employee to guarantee the clarity of the data. The crew profile is adapted for every Company individually.

#### 11.1.2.1 Special Request

In the system all special demands can be inserted too. This function has been conceived before all for guests.

#### 11.1.2.1 Medical

There are three parts:

- Equipment: All devices and drugs are inserted, which are needed for the position or the health of the employee.
- Education: All medical educations are inserted.
- Medical findings: All medical findings are needed for a good medical care aboard, can be inserted, e.g., allergies.

#### 11.1.2.1 Clothes and Equipment

All working materials are handed over to an employee have to be inserted in the system. A distinction is whether the materials are managed in the stock or just as information for the company will be treated.

### 11.1.3 Managing Guests

Guest will be added to the list of active crew similar like normal crew - with one difference: guest will have the status "Guest". Beside standard crew details you may also collect for a guest information like Pets and Special Requests.

#### 11.1.3.1 Pets

Use the Pets section for collecting data about guests pets. In most cases it will be sufficient to provide details about necessary documents for traveling.

#### 11.1.3.2 Special Requests

The Special Requests sections collects all information about a guests special requests. This could be information about the food style to be served, special requirements regarding the accommodation on board or any other special request that might be important.

### 11.1.4 Crew Planning

#### 11.1.4.1 On / Off Signer

The view of the lists can be freely chosen. In the left pane, the details of the selected employee is displayed.

Transportation Details: With the function Transportation details flights can be requested for each employee on the list . In addition, all other Transportation details are entered via the function "Assign New".

Flight Request: It is possible, all flights from On and Off Signer will be collected sent to the travel agent. All requests will be mailed in ZBdoc format and can also be imported in this format.

Send to Agency: The On and Off Signer data are sent with all necessary information to the appropriate agency of the harbor.

#### 11.1.4.2 Graphical Planning

It is possible for each site according to the rank list to plan all or individual positions. The system choose from all active crew. This is the designed into four sections.

##### **Pref Ship**

All employees will be planned who have the selected ship in their details as a preferred ship.

##### **Pref Ship type**

The system elected all employees, which have the preferred ship type adequate to the ships type of the selected ship in their details.

##### **Pref Fleet**

Now all employees with the correct fleet as preferred will be elected.



## Job

Now all employees with the correct job will be elected for the planning

So far, all employees will be selected in alphabetical order. All 4 sections can be processed in one step. It is always possible to plan with or without checking the certificates. If all 4 sections of planning are completed, the remaining blanks have to be closed manually.

### 11.1.4.3 Planning Generator

The planning generator is designed for ship by ship planning of the groups. All major data in the overview are displayed as the information whether a group was assigned to several ships. The fixing of the first start date for each group has to be performed manually. It should be noted that there are no overlaps. After this the date is automatically saved by the system.

Assignments are created by creating a crew members assignment record having the sign on and sign off linked to crew changes entries in the time table module.

The creation of an assignment is done with some easy steps:

1. Choose the status type (on board, on leave etc.). The chosen status controls what further details are necessary for defining an assignment record.
2. Choose a ship/site. This will mainly control what ranks/positions will be shown in the following selection.
3. Choose the position (the rank).
4. Set the sign on date by choosing a crew change from the list of available crew changes.
5. Adjust the sign on date if the selected crew change if the selected crew change describes a period of more than one day.
6. Repeat the steps from 5. for the sign off date.

Notes:

- Crew change entries must be defined in the Time Table module before they can be shown in the assignment record creation screen.
- The date values shown below the selected sign on and sign off crew change can be changed only within the date range defined in the crew change entry.

### 11.1.4.4 Configuration

The configuration settings for the Crewing module can be found in the central configuration screen. All crewing related configuration settings are also available within the Crewing module.

#### *Manage Planning Groups*

The Planning Groups are required only for the planning generator. Each group will be assigned to each ship using planning frequency onboard-ashore-onboard-ashore and so on. Each group can be assigned to different ships.

### ***Manage Required Working Days***

This function is intended for all users to adhere to a minimum working time of their employees. Any time period can be chosen which these working days must be made.

### ***Manage Job Names***

In the configuration for each job name can be entered the normal, max and min values for the assignments and leaves. These can be changed individual in the rank lists of sites. The planning module needs these data. The data are irrelevant for planning generator.

### ***Manage Transportation Details***

The Standard Transportation types are listed automatically with the installation of the system. In addition, there are other types of transportation can be entered.

#### **11.1.4.5 Crew Changes**

For all companies that do not work with the Timetable, here are the features of the Timetables implemented. So crew changes can be defined without a time table according to assignments or freely.

#### **11.1.5 Status Overview**

In status overview all active employees will be displayed in alphabetical order. You can choose between card and list view.

##### **11.1.5.1 Budgeting**

All crewing relevant budgeting data will be sent automatically to the Budget module based on the given configuration. Please see the chapter [Budgeting](#)<sup>78</sup> for more details.

#### **11.1.6 Payroll**

The Payroll system is designed exclusively for the settlement with fixed dues. Only gross = net billings and billings gross-% tax= net can be created directly in the system. For all other purpose, the gross value will be prepared in an interface for an external system and all values are imported, only informative and are not subject to review for factual accuracy.

## **11.2 Machinery Components**

In the Components section of the module you can perform several tasks based on the currently selected component.

You can:

1. Create maintenance reports for regular maintenance jobs
2. Create exceptional reports for unexpected maintenance jobs and machinery break down
3. Create requisitions for component spare parts
4. Create service orders

After selecting a component you will see an overview about the components status. This includes details about due maintenance jobs, details about recent maintenance work and quick access to other details like supplier and maker contact details and spare part lists.

### 11.2.1 Component Counters

Each component in the system shows you a counter representing the running hours of the component and a date when the counter value was updated.

There are two main types of counters: independent counters and depending counters.

#### Independent Counters

Machinery components like the main engine, separators and similar usually have their own running hours counter which can be found directly at the component or as an information from the automation system or via a control panel. The counter value shown for these components is the same for all sub-components of this machinery component unless a sub-component has its own independent counter.

Components with an independent counter have the option **Uses own counter** checked in the details view and in the editing form.

#### Depending Counters

Most components managed in the system are depending on the running hours counter of a parent component. That means: the running hours of such a component is determined by the current running hours of the main component a sub-component is attached to.

#### Distribution of Counter Updates

Whenever the running hours of a component will be updated (for instance by creating a maintenance report that also contains the running hours at the time of executing the job), this update will be distributed to affected components. If the component the maintenance report is created for has its own counter, the update will be distributed to all sub-components (except the sub-component has its own independent counter).

If the component the maintenance report is created for doesn't have its own independent counter, the system will look for the next parent component that manages its own independent counter. Starting from this parent component, the counter update will be distributed to all sub-components.

Counter values entered into the [Counter List](#)<sup>184</sup> will be distributed only to the components sub-components - simply by the fact that only component with an independent counter will be shown in the counter list.

#### Managing Counter Deviations

After replacing a sub-component you might have the situation that the running hours of the sub-component will be lower than the running hours of the parent component (or is greater in case of an refurbished sub-component). For instance a pump with a current counter of 9,000 hours gets brand new electro-motor as a replacement for an older e-motor. Without further adjustments this e-motor would get automatically a counter value of > 9,000 hours during the next counter update of the pump (via the counter update distribution described above).

This situation can be solved by providing an adjustment factor for the e-motor to be considered while calculating counter value updates. This adjustment factor will be always added to the reported counter value. In case of the e-motor replaced at 9,000 hrs we will give an adjustment factor of -9000 to reflect the actual counter value of the new e-motor (parent components 9,000 hrs plus -9,000 adjustment for the new e-motor equals 0 hrs actual running time of the new e-motor).

The adjustment factor can be added to a component with the **Edit** function in the Components View. Enter the adjustment factor into the entry box **Adjustment**. In case you don't have the Edit right for the component details you can use the function [Adjust Counter](#)<sup>185</sup> for updating the adjustment factor.

### 11.2.1.1 Updating Running Hour Counters

The preferred way of updating the components running hours in the system is by creating a maintenance report. Whenever a new maintenance report is added to the system, the counter values entered while creating the report will be used for adjusting the next maintenance schedules of the component and affected sub-components.

For components with changing average running hours per day it could be useful to enter the current running hours manually for having a more accurate forecast of maintenance job due dates. The manual update can be done via the menu **Lists -> Counter List**. This calls up a report with all component counters that are known in the system and that have been flagged as to be shown in the counter list. Within the list you can enter the new for the components you want to adjust. For components that you don't want to adjust, just leave the counter value column empty.

#### **Adjusting Average Running Times (ART)**

After entering a new counter value you will see the resulting new average running time in column **Calculated Average Running Time**. This is only a guidance to show how the current counter values affects the average running time. If you want to take over the calculated value as the new values to be used for maintenance schedules list updates, you will need to enter the desired value in column **Average Running Time**.

#### **Applying Counter Value Changes to the System**

As long as you enter counter values and new values for the average running time, these values will not be saved immediately to the database. Only after clicking the button **Save** all changes will be updated in the component records, counter history records will be created, counters of sub-components will be updated (as long as they don't have their own counter) and the

maintenance schedules list will be updated. Please note that the maintenance schedules list update performed at this stage will update the counters for the next week only.

### Using Interface for Automatic Updating

Your installation of the system may include an interface for an automatic updating of the running hour values in the maintenance system. Counter values that are being updated by an interface will usually not be shown in the Counter List. Depending on the users access rights there might be the exception that a manual updating will be allowed in case of malfunction of the interface. Further details can be found in the related interface description.

#### 11.2.1.2 Counter List

*Requires access right Maintenance > Components > Component Counter > Counter List Updates*

The Counter List allows the checking and reporting of current counter values for all components having an independent counter and having the option "show in counter list" enabled. The Counter List also shows all counters that will be imported via an existing counter interface.

### Reporting New Counter Values

Reporting a new counter value is simply done by choosing the related component in the list and entering the new counter value. You can repeat this step for each component you want to update. The new values will be saved to the database after clicking the button **Save**.

### Managing the Average Running Time (ART - [see glossary](#)<sup>360</sup>)

After entering a new counter value, the system will automatically calculate the average running time per day, depending on previously reported counter value changes. In most cases you won't need to touch the calculated values. In case you have an untypical mode of operation of an component that is not properly reflected in the shown ART value, you may overwrite the calculated value with your own data.

### Limitations

- New counter values that are lower than previously reported counter values will not be accepted. If such an adjustment is really necessary, use the function **Adjust/Reset Counter** instead (see [Component Counters](#)<sup>182</sup>).
- ART values greater than 24 will not be accepted as the average running time describes the average running time per day.

### Using Counter Interface

If there is an interface available for retrieving current counter values from an external system (e.g. automation system or external counter interface), the affected components will have a check mark in column **Interface** and will show a reference ID to the related counter in column **Interface ID** (e.g. counter values received from a Honeywell IAS system will be shown as "IAS-

*counter address*"). The counter values received via the interface will automatically be put in column New Counter - but you may still overwrite these values if necessary.

If there has been an error detected while retrieving the counter values, the status column will show a red light. The counter value might not be available at all, might be lower than the already reported value or the resulting new ART would exceed the maximum of 24 hours. In this case the new counter value must be entered manually.

### 11.2.1.3 Reset Counter

*Requires access right Maintenance > Components > Component Counter > Adjust Counter*

The Reset Counter function is used for correcting wrong counter values in the system - especially if the correct counter value is less than the counter value already entered into the system. As features like the Counter List do not allow the input of a counter value that is less than the previously reported counter value the Reset Counter allows the input of the correct value and will also update all existing maintenance jobs execution and due date for reflecting the change.

The maintenance job update is done by calculating the average running time of the component resulting from the new counter value and the due dates of the maintenance jobs will be set accordingly.

*Please note: Using the Reset Counter feature will affect the selected component and all sub-components without an own counter. If the Reset Counter feature will be used on a component without an own counter, the counter value update will be distributed to all sub-components but also up the next component in the hierarchy with an own counter.*

### 11.2.1.4 Adjust Counter

*Requires access right Maintenance > Components > Component Counter > Adjust Counter*

The **Adjust Counter** function is used for correcting a components counter value in case of it has been replaced with another component that has a different lifetime or in similar cases.

The counter adjustment is done by entering a factor that will be calculated against the existing counter values in the system.

#### **Example:**

The system has already a lifetime of 9,500 hrs. The new component used as a replacement has a lifetime of 0 hrs. The adjustment factor to be entered is -9,500. When the system reaches a lifetime of 10,000 hrs the given adjustment factor will be added to the systems lifetime resulting in a lifetime of the new component of 500 hrs.

### 11.2.2 Create Maintenance Reports

By clicking on the button **Create Maintenance Report** you can start the creation of a maintenance report for the currently selected component. For regular reports you will first see a selection of all maintenance jobs that are known for the selected component. But you may also create exceptional reports or break down reports. For further details of the report creation please see topic [Reporting](#)<sup>190</sup>.

### 11.2.3 Create Service Orders

In cases where you don't want or can't execute a maintenance job you may create a service order instead. After clicking the button **Create Service Order** you can use one of the defined maintenance jobs of the component or, in cases of an exceptional service request, you may also start with a blank service order. The system will assist you with the creation of a standard requisition in the Purchasing module by adding all maintenance relevant details to the new requisition. While editing this requisition you may also add necessary spare parts or other articles to the requisition as long as they can be delivered by the same supplier. For more details of the creation of requisitions in the Requisition module please read the topic [Creating Requisitions](#)<sup>80</sup>.

### 11.2.4 Create Spare Part Orders

Clicking the button **Order Spare Parts** allows you to create requisitions for spare parts of the currently selected component. After clicking the button you will see a selection of known spare parts of the component. Within this list you can select one or more spare parts to be put on the requisition.

Spare part orders can be put into new requisitions or into requisitions that have been previously created. Please note that only those requisitions will be made available for adding spare parts that have not been sent ashore already for further processing.

For further details please read the topic [Creating Requisitions](#)<sup>80</sup>.

### 11.2.5 Spare Parts

Spare parts are managed in the separate [Stock Control](#)<sup>194</sup> module. There you can organize all the component spare parts together with other articles and consumables.

If you have purchased the separate Spare Part module you can link articles found in the stock control database as spare parts to your machinery components by using the **Edit** button. Tracking information for spare parts that have been used or consumed will be automatically send to the Spare Part module when necessary - e.g. reporting used spare parts in a maintenance report.

### 11.2.6 Lists and Reports

The Maintenance module provides a variety of reports for analyzing component data and related information. All these reports can be accessed via the menu item **Lists**. The number and types of reports shown in the menu depends on the currently active user access rights.

All these reports have in common that all relevant results of the report will be shown first in a simple data table. The content of this table can be arranged by using the sorting, grouping and filtering features available in the data grid (similar to the features found in application found in Microsoft Outlook). The button **Export to Excel** will create an Excel file based on the current arrangement in the data grid.

### 11.2.7 Register Component Certificates

To register a component certificate, start the ZeeBORN maintenance module.

Please choose the relevant component in the tree (for a clear view please hit checkbox „Show SFI Code“, as seen in screen shot) or use the function “Find component”.

For searching hit „Find Component“. (1).

Please insert Code or component name (2) and confirm with „search“. If the relevant component is in the list, choose component and hit „goto“(3).

#### **register a certificate**

Hit „Certificates“ of the component.

A new form will be displayed. Now hit “Component Certificates” and choose “Add”.

Choose relevant Certificate group and the needed certificate and hit „OK“.

### 11.2.8 "Kozlowski Tools"

This feature requires user access right **General > Access to Pre-Release Features > Maintenance > Kozlowski Tools**

"Kozlowski Tools" is a set a functions created together with and named after Miroslav Kozlowski who helped to develop a set of essential tools for creating a new database for a new vessel.

As the set of the Kozlowski Tools is intended to be used only for created new databases for new vessels, it should be carefully used for vessels already in operation.

Function	Description
<b>Cut/Paste</b>	While there is the <b>Move</b> function available for achieving the same results, in some cases it might be more convenient using <b>Cut</b> and <b>Paste</b> incl. the related keyboard shortcuts for moving a component in the component tree.
<b>Copy/Paste</b>	<b>Copy/Paste</b> allows to ways of operation



	<p><b>Copy</b> marks a component as the source of data to be used for the following <b>Paste</b> operation.</p> <p>With <b>Paste</b> you can either paste the copied data to an already existing component or you can use the copied data for creating a component - data will be added as a new sub-component to the currently selected component.</p> <p>While pasting the data to an already existing component you can decide what type of data shall be included (maintenance jobs, spare parts, documents) and if existing details will be removed of those can't be found at the source component.</p> <p>After copying maintenance job data to another component the function <b>Calculate Schedules</b> in module <b>Schedules</b> should be used for creating the next due dates for the copied maintenance job data.</p>
<b>Copy to other site</b>	<p>While the <b>Cut/Copy/Paste</b> functions are limited to the data within the same site/vessel, <b>Copy to other site</b> can be used for copying a component (incl. sub-components, maintenance jobs etc.) to another site/vessel.</p> <p>Components copied to another site/vessel will always be added to the top level of the destination site/vessel. The <b>Move</b> function can be used later on for moving the component to the correct location in the component tree.</p>
<b>Delete (incl. sub-components)</b>	<p>The normal <b>Delete</b> function is quite limited (on purpose) to prevent the accidental removal of component data - it can be used only if all sub-components have been deleted before.</p> <p>With the <b>Delete (incl. sub-components)</b> function in the Kozlowski-Tools set, a component incl. sub-components and related details like maintenance jobs and spare parts can be deleted without further confirmation.</p>
<b>Assign responsibility</b>	<p>This feature allows to assign the responsibility for all maintenance jobs of the selected component and sub-components.</p>
<b>Synchronize Components</b>	<p>Instead of using the <b>Copy/Paste</b> method for copying data from one to another component, the <b>Synchronize Components</b> function can be used for performing a list to list copy operation. The window shown after starting the tool shows two lists with all components of the current site/vessel. The left side is used as source data and the right side as destination. With the "Sync" button details of the component selected on the left side will be applied to the component selected on the right side.</p>

<b>Recover unlinked components</b>	This tool is useful after importing component data from an external source. In rare cases it can happen that some components have a wrong or missing link to a parent component in the component tree - those components cannot be found and accessed in the component tree. With the <b>Recover unlinked components</b> function those components will be made available in a special folder " <b>(lost/recovered component data)</b> " and can be moved later on to the correct location in the component tree.
<b>Create El. Motor</b>	This is a simple function for creating an electrical motor as a sub-component for the selected component.
<b>Delete Unused Job Codes</b>	This function checks all job codes defined for the current site/vessel and will deleted all job codes currently not assigned to a maintenance job.

## 11.3 Maintenance Jobs

The Maintenance screen is the central place for accessing the current maintenance job schedules, for creating job reports and for accessing older reports that have been created before.

The maintenance schedule management is done on a ship by ship base. Whenever you want to use one of the available functions in the Maintenance screen you will need to select a site/ship first.

### 11.3.1 Maintenance Job Schedules

In the Schedules section you have access to all due maintenance jobs. In this section you have access to the following functions:

<b>Calculate Schedules</b>	This function calculates the maintenance schedules for the next week, next month or for a whole year - depending on your selection. In result you will see the schedules for all due maintenance jobs for the selected ships. If there are older maintenance jobs that haven't reported yet, these jobs will be also shown in the list as overdue jobs indicated by showing the due date in red color.
<b>Report</b>	This function helps you to create a maintenance report for one of the selected maintenance jobs. For more information please see chapter <a href="#">Reporting</a> <sup>190</sup> .
<b>Show Details</b>	Shows the details of the maintenance jobs. In the details view you'll have also access to the data of the affected component, older reports for the same job, lists of spare parts and many other information that might be useful for preparing a maintenance task.

**Component Details** Use this function for seeing the details of the component that is affected by the selected job.

### All Active Jobs

In the menu bar you can call up the report **All Active Jobs** showing you all maintenance jobs that have been created for the selected site/ship. This function will show you a list with all known maintenance jobs and allows you to arrange the data in many ways (sorting, filtering, arranging in groups). For further processing of the data you can export the data shown on screen to an Excel file by clicking the button **Export to Excel**.

## 11.3.2 Reporting

After clicking the button **Report** in the **Schedules** part of the Maintenance module you will be able to collect all the data of an executed maintenance job. For counter depending jobs you will also be asked to enter the counter value at the time of executing the job. The counter value entered into the report will not affect the current counter value of a component - this can be adjusted only via the [Counter List](#)<sup>184</sup> function.

### Adding Used Spare Parts

While creating the report you can also add details about spare parts used for performing the maintenance job. Switch to the **Used Spare Parts** tab and use the buttons **Add** and **Remove** for creating the list of used spare parts. After clicking the **Add** button you will see first a list of spare parts of the component by the affected by the maintenance job. If a spare part cannot be found in this list you can also choose any spare part from any location on board.

### Adding Document Files and Photographs

In addition to the information you can provide in the **Findings** edit box you can also add document files or photographs to the job report. Switch to the tab **Documents and Photos** and use the buttons **Add** and **Remove** for creating the list of document attachments.

Depending on your configuration settings the size of the documents to be added might be limited. Document files that will exceed the given size limit will not be allowed to be added to the maintenance report. Photographs in JPEG format will be resized and compressed automatically to a suitable size. The compression ratio is also defined in the configuration settings and cannot be changed by the user.

## 11.3.3 Reports

The **Reports** section of the **Maintenance** screen gives you access to all maintenance reports that have been created for the selected site/ship. Access to this section is enabled only after selecting a site/ship first.

Details of a report can be seen after selecting a report in the list and clicking the button **Report Details**. For further processing of the reporting data you may also export the lists content to an Excel file by clicking the button **Export to Excel**.

### 11.3.4 Job Details Editor

This function is available only with the necessary user access rights.

In the Maintenance Job Details editor you can manage the essential information for a single maintenance job. In the following you will find a description of each details you can enter in the editor.

#### **Component**

Shows the name of the component the maintenance job is related to. This information cannot be changed within the editor.

#### **Job Title**

By clicking the "..." button you can choose a maintenance job from the list of pre-defined jobs. This will also give you later on access to the optional job description that is part of the pre-defined jobs.

#### **Responsible Person**

Choose one of the available responsible persons for assigning the responsibility for this job to this person. The responsible person will be shown in the schedules list and can be used there as a filter criteria for limiting the list of shown schedules to this single person.

#### **Type**

A maintenance job can be defined as a one time ("only once") job or a periodical job ("recurring"). A one time job will be shown in the schedules list only once with a due date resulting from the given counter or date. A periodical job will be shown for each single due date within the time frame the schedules list has been calculated for.

#### **Interval**

The interval describes the frequency of how often a maintenance job needs to be done. You can set this frequency as **Counter Depending** if the due date of maintenance jobs shall be calculated based on the expected running hours of the related component. This considers also the given average running time (ART) for the related component.

#### **Next Due Date**

For single jobs (executed only once), you can set here the due date of the job. It's not possible to set a due date for maintenance job with intervals.

The next due date will be calculated by the software. For new maintenance jobs that do start later than the installation date of the component, please set the Last Execution information as a starting point for the maintenance schedules calculation.

### Last Execution (or Start Details)

When creating a maintenance job you can enter here the last known counter value and date when this job has been executed. This information will be used for calculating the next due date. If resulting maintenance schedules shall not be calculated based on the installation of the component, you will need to enter the a counter/date as a starting point for the further calculation of maintenance schedules.

## 11.4 Stock Control

The Stock Control module shown in the Maintenance module is an integrated version of the independent Stock Control module. The features and functions of the integrated version are identical to the stand-alone version. For further information please read chapter [Stock Control](#)<sup>194</sup>.

## 11.5 Change Requests

*Please note: This feature is available only if it is activated in your license and if the Administrator has assigned the necessary access rights to you.*

The Change Request feature has been added as an alternative way of modifying the database content in the Maintenance module. Instead of changing the data directly in the database, change requests can be created independent off the current data in the database and without affecting the operation of the system.

Change requests can be created for the following entries:

- components
- maintenance jobs
- job codes/job descriptions
- spare parts

A change request can be a request for:

- adding a new entry to the database
- changing an existing entry
- deleting an existing entry

The editing function for creating new entries and modifying existing entries are exactly the same functions you already use during the normal operation of the Maintenance module.

### Difference between office and client version

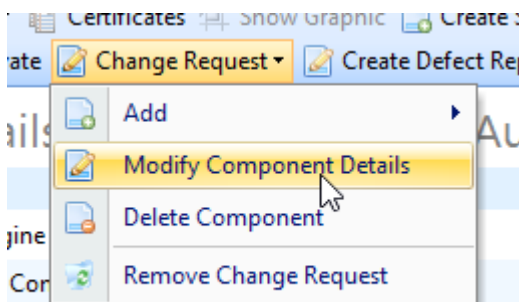
- The functions for creating change requests are only available in ship/site versions of the software.
- The functions for creating change requests are not available in the office version. Please use here the standard edit functions.

- The functions for approving or rejecting change requests are only available in the office version.

Please note: The availability of the change request features is controlled via the user management. You may override the default user management settings and may make these features available wherever you want.

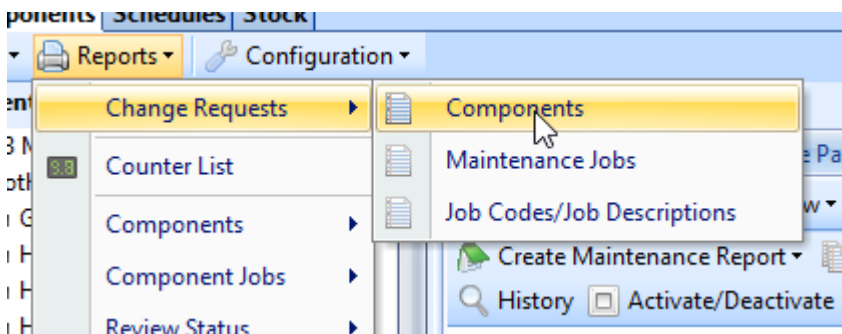
### Creating a change request

Where enabled, you'll find a menu **Change Request** that gives you access to the different change request creation options. For components, maintenance jobs and job codes, this feature can be found in the **Components** section of the Planned Maintenance module - the change request feature for spare parts can be found in the **Stock** section of the Planned Maintenance module.



### Approving and rejecting change requests

Via the menu **Reports > Change Requests** you'll find all change requests that are still open to be approved or rejected.



In the change request report window you find a section **Add/Delete** change requests and **Modify** change requests. An Add/Delete change request is always approved or rejected for the entire database record while the Modify section allows you to specify in detail, which of the requested changes are to be applied to the system.

Please note: Spare part change requests are to be managed in the **Stock** section of the Planned Maintenance module - also via the menu **Reports > Change Requests**.

## 12 Stock Control

---

The Stock Control module is your central place for managing all kinds of articles, consumables and component spare parts. Articles managed in the Stock Control module can be used as spare parts in the [Planned Maintenance](#)<sup>176</sup> module and can be also added to requisitions and purchase orders in the [Purchasing](#)<sup>80</sup> module.

### 12.1 Differences Between Locations and Catalogs

All items in the Stock Control module are managed and grouped by locations and catalogs. "Location" usually means a real place on board or in a office - it can be a room, or a shelf in a room or a box in a shelf or any other organizational unit you can imagine.

Locations are defined and managed per site/ship.

Beside the locations you can also manage articles in catalogs. Compared to locations a catalog can be seen as a central place for managing article data. Catalogs are available to all sites/ships.

#### Managing Quantities/Inventory

Quantities of stock items can be managed only in locations. This includes usage or consumption tracking of stock items, tracking of restocking items and finally using the inventory feature for checking stock quantities. All these features are not available for catalogs. But you may link catalog entries to stock items in a location. This allows comfortable updating of article information in the catalog and updating the new information to all linked stock items (e.g. updating price information or article descriptions).

### 12.2 Locations

The ZeeBORN system uses the term "Location" for organizing articles and spare parts in groups. You may decide to reflect the real structure of your storage locations but you may also use a more organizational structure.

#### 12.2.1 Managing Locations

Locations are always related to a ship/site and will be managed independently per ship/site. All locations are managed in a typical tree structure having main locations and sub locations. You can create as many sub locations as you want. There is no limitation in the depth of levels supported by the tree hierarchy.

The management functions for the location management are available in the Stock Control main window at the top of the locations tree. There you find functions for adding, modifying and deleting locations.

### 12.2.2 Managing Stock Items

Stock items (or articles, or spare parts) are managed in a per location way. You can find a stock item by opening the related location in the location tree or you may use the search function for finding an entry in the database if you are uncertain about the location of an article.

Beside the typical functions adding, modifying and deleting stock items in terms of maintaining the stock control database you have also features for the day-to-day work.

#### Extended Article Details

If required, the system can manage for selected articles extended details like extended location info (if an article is stored at more than one location), separate serial numbers per article and expiry dates. After clicking the **Edit Details** button, you can start adding additional details for the selected article.

As soon as the collection of extended details was started for a selected article, all quantity information will be taken from the extended details. Changing the quantity values in the details view will automatically update the total quantity for the article.

**Please note:** This feature is available only for consumable articles. This feature is not available for licenses that have also the Purchasing module activated.

#### Ordering

Please read [Creating Requisitions](#) <sup>198</sup> for further information.

#### Quantity Adjustments

There are many ways of how the quantities of stock items can be managed in the system:

1. Manual adjustments by using the Edit function.
2. Automatic adjustments by reporting spare part usage in a maintenance report.
3. Automatic adjustments by reporting the delivery of previously ordered articles.
4. Manual adjustments by creating an exception report.

The availability of these features highly depends on the company's policy about quantity tracking. In some companies the manual adjustment is not allow and the usage of exception reports will always be required for adjusting differences in the stock's quantities.

### 12.2.3 Linking Stock Items To Catalog Items

A stock item in a location can be linked to an article in a central catalog. This identifies both entries as identical.

Via the link between the catalog article and the stock item in a location you get the following advantages:



1. Adjustments of detail information and prices for catalog articles will be automatically distributed to all linked articles. Instead of adjusting the stock items details manually for each single ship/site you can use the catalog for the centralized management of these data.
2. Having a link for a catalog article to a stock item in a location enables the quantity tracking for this item. Catalog articles do not support quantity tracking due to the central character of this database - stock items do.

#### 12.2.4 Stock Tracking/Inventory

Changes of a stock item's quantity are tracked automatically. This includes

- using of stock items as spare parts (if reported as usage in a maintenance report)
- manual adjustments
- manual adjustments with exception reports
- received stock items as part of a delivery

The tracking information are shown in the details screen for each article. Related reports can be accessed via the **Lists** function.

#### 12.2.5 Importing from Excel

With a right-click on a stock location, the shown pop-up menu provides an option for importing article data from an Excel file.

##### Pre-Requisites

*Compared to previous versions it is no longer required to have a matching version of Microsoft Office or Microsoft Data Access drivers installed on the same PC where you want to import the data. The import feature has no longer any dependencies on any external software.*

The import feature expects the Excel file to be in a defined format. A template for the Excel file to be used can be downloaded from <https://downloads.zeeborn.net/ImportTemplate.xlsx>. Data to be imported into the stock control database are to be added to the "Spare Parts" sheet.

##### Importing Stock Data

The import of stock data is done per location. Choose the stock location you want to import the article data into and right-click on the location's name for accessing the pop-up menu. In the pop-up menu you'll find the function **Import from Excel Template**. The system will ask you for the Excel file to be imported. If the structure of the selected Excel file matches the required structure, all data from the Excel file will be imported to the currently selected location.

##### Updating Stock Data

For updating stock data by using the Excel template file (function **Update from Excel Template**), it's required to use the Internal No. value of the stock articles. Only stock items with a matching Internal No. will be updated with the data found in the Excel file.

### 12.2.6 Label Printing

The ZeeBORN supports the printout of barcode labels for selected articles with a DYMO LabelWriter.

As soon as the DYMO LabelWriter is connected to your computer or is available via a network connecting, you will be able to print a label to the printer. The label will be printed without any further confirmation.

The standard layout for label printing will print the following article details on the label:

- Internal number and article name
- Article type
- Location info
- Component details (internal number and name) if the article is used as a spare part for a component
- Bar code containing the internal database ID of the article in Code 39 format

#### Requirements:

- Label printing must be enabled in your license (just ask the ZeeBORN support team for getting the label printing enabled without extra costs)
- Currently only DYMO LabelWriter label printers are supported
- Only DYMO LabelWriter labels with article no. 99012 are supported

Label printing is available in the Stock Control module while browsing the articles in the locations. You may also print labels in the delivery receiving section of the Purchasing module

## 12.3 Catalogs

Catalogs are more or less identical to locations of a site/ship. The only difference between a location and a catalog is the unavailability of quantity management features on catalog level. But via the linking feature that links a catalog entry to an stock item on board you get a central management of article details that will distribute changes in article descriptions and pricing automatically to the related stock items on board without the need of a manual update of each stock item for each related site/ship.

### 12.3.1 Managing Catalogs

Catalogs are managed in a hierarchical structure with main catalogs and sub catalogs. These catalogs can be organized by suppliers (e.g. by entering the original content of their catalogs into the system) or in any other organizational structure you prefer.

The management functions for the catalog management are available in the Stock Control main window at the top of the catalog tree. There you find functions for adding, modifying and deleting catalogs.

### 12.3.2 Managing Catalog Items

Catalog items (or articles) are managed in a per catalog way. You can find an article by opening the related catalog in the tree view or you may use the search function for finding an entry in the database if you are uncertain about the related catalog of an article.

Beside the typical functions adding, modifying and deleting articles in terms of maintaining the catalog database you have also features for the day-to-day work.

#### Ordering

Please read [Creating Requisitions](#)<sup>198</sup> for further information.

The quantity tracking for catalog articles happens only on purchase order level by comparing the number of ordered articles with the number of received articles. Further stock keeping management features are not available for catalog articles. If there is a link to a stock item, quantity changes will be transmitted to the stock item.

### 12.3.3 Importing from Excel

The catalog article import is identical to the import feature used for stock articles (see [Importing from Excel](#))<sup>196</sup>.

## 12.4 Creating Requisitions

All items shown in catalogs and in locations can be ordered with the Purchasing module. Just choose the item(s) you want to order and click the button **Add to Requisition** for creating a new requisition or adding the item(s) to an already existing requisition.

If you want to add the selected item(s) to an already existing requisition, this feature will be available only for requisitions that have not been approved already. Requisitions that have been already processed (checked, approved and converted into a purchase order or request for quotation) will not be shown in the list of available requisitions.

When ordering items from a catalog you will be asked for a stock location while reporting the receiving of ordered items. This starts also the stock tracking for the items.

## 13 Document Management

---

The ZeeBORN Documents module is the main module for managing all types of document files. All documents are organized within a hierarchical library that is always shown on the left side of the screen.

One of the most important features is the release management of documents. Each document in the library can be made available to connected clients by assigning them to a site/ship. The actual transfer of documents will be automatically done in the background. This also includes the automatic distribution of updated versions of a document as soon as a new version of a document has been released.

There are two main types of documents:

**Controlled Documents:** This type of documents involves an approval and versioning process for each single release of a document. Controlled documents will be made available to other sites/ships only after final approval and releasing of a document. Controlled documents have also an automatic versioning feature. Whenever a new version of an existing document will be created, the previous version will be stored in an special archive. Beside having a history about the different stages of a document you will also always have access to older versions of a document. Depending on the used file format you will also be able to call up the visual difference viewer highlighting the changes in the newest version compared to any other previous version in the archive.

**Uncontrolled Documents:** Uncontrolled documents are used for the easy distribution of documents without involving further document management features like the approval process and the automatic versioning. As soon as an uncontrolled document will be added to the library and the library is assigned to selected sites, this document will be made available immediately with the next data replication.

### 13.1 Managing The Library

The library with its single library sections is the main structure for managing documents in the system. For each section you can decide

- which site/ship will have access to the documents of this section (see [Assigning Documents To Sites](#) <sup>[202]</sup> for more)
- if the documents of a section will be managed by using advanced document management features (controlled documents) or if these documents will be just made available to other sites without further version control

Use the button **New** to create a new section in a library. The currently selected section will be used as the parent section. While creating a section you will need to enter a name for the section and you will also have to decide if this section will be used for managing controlled or uncontrolled documents.

#### Special Handling of Imported QDMS Documents

If your document library has been created by importing data from AVECS QDMS/Interschalt QDMS, the first level of the library tree will be considered being the folders in your library and the second level being the chapters within those folders.

### 13.1.1 Configuration

The Configuration dialog within the Documents module allows you the modification of the header to be inserted on top of each document and you can also define a company logo to be inserted in the header.

Please note that the modification of these data should be performed only by trained users as a wrong configuration of the header information may affect the output of all documents in the system.

#### Definition of the Header Layout

The header is defined as an HTML snippet to be inserted at the top of each document shown in the system. Most HTML tags and styles can be used.

In some cases it could be useful to apply all style attributes for all elements in the header as other styles defined in the document itself or in any attached CSS style sheet might get applied at the same time.

#### Document Variables

For the dynamic updating of the document header with information of the currently shown document, the system supports a number of different document variables that will be replaced with the actual content while preparing the complete document including the header.

Each variable in the header source must be enclosed in a special tag sequence:

```
<span class="var">%variable%</span>
```

The following variables are currently available:

%DOCUMENTTITLE%	document title
%DOCUMENTFOLDER%	names in folder hierarchy
%DOCUMENTVERSION%	version number
%DOCUMENTSTATUS%	document status (e.g. "new", "checked" etc.)
%COMPANYLOGO%	identifies the place where the company logo shall be shown; for extended formatting you can also assume the availability of the logo file as logo.png, so you may define your own <img> tags with customized styling

%DOCUMENTCREATEINFO%	creation info: name of user and date
%DOCUMENTCHECKINFO%	checking info: name of user and date
%DOCUMENTAPPROVEINFO%	approval info: name of user and date
%DOCUMENTRELEASEINFO%	releasing info: name of user and date
%DOCUMENTARCHIVEINFO%	archiving info: name of user and date
%DOCUMENTFOLDERNAME%	for QDMS compatiblity: shows the folder a document belongs to
%DOCUMENTCHAPTER%	for QDMS compatiblity: shows the chapter a document belongs to
%DOCUMENTAPPROVAL%	shows a one line text with all relevant approval information (can be used as an alternative of using DOCUMENTCREATEINFO etc. seperately)
<!--UC-->	this is not to be enclosed in the <span> tags - this tag will be replaced with a "- uncontrolled copy -" text while printing the document

### Logo Bitmap

The logo bitmap to be defined in the configuration dialog must be provided in PNG format and must contain an Alpha layer defining the transparent parts of the logo.

## 13.2 Managing Documents

This chapter describes the general functions available in the document management module.

### 13.2.1 Creating Documents

A "document" in the ZeeBORN Documents module represents a single record in the library that holds one or more document files. In most cases you will manage one document file with one document entry but in some cases you might have a collection of several files that in fact present one document (e.g. multiple graphic files each containing one page of a multi-page document).

After clicking the button **New** you'll need to enter a title for the document. With the buttons **Add, Edit, View, Delete** you can manage the document files to be added to the document entry. After creating the new document entry the document will have the version number 1 and status "new" - in a section defined as a container for uncontrolled documents the status of the document will automatically go to "released".

### 13.2.2 Assigning Documents To Sites

The distribution of documents to other sites is done by assigning the related library section to one or more sites. As soon as a library section has been assigned to a site, released documents and uncontrolled documents will be distributed automatically with the next data replication.

The assignment of documents to a site on document level is not supported. You will always need to put a document in a library section that matches your distribution needs.

#### Distribution List

For each library folder in the system you can define what sites will receive the contained documents and any future updates to these documents. Click the button **Assign Sites** for choosing the library folders you want to make available for the selected sites.

### 13.2.3 Releasing Documents

The release process of documents is only relevant to controlled documents. Uncontrolled documents will be released automatically after creation and after creating a new version of an existing uncontrolled document.

Controlled documents require a 3-step release process: Check, Approve, Release. According to international document management standards these three processes can be assigned to different users by giving the necessary access rights in the user management. The system will track for each step in the approval process when a certain approval was given and who did the approval.

#### Check

A newly created document or a new version of an existing document have always the status "new". Click the button **Check** to set the status of the document to "checked". After setting a document to status "checked" only users with the approval or releasing access right will be able to modify the content of a document.

#### Approve

Click the button **Approve** to set the status of the document to "approved". Only users with the access right for releasing a document will be able to modify the content of a document.

#### Release

Click the button **Release** to set the status of the document to "released". As soon as a document reaches to "released" status it will be automatically distributed to all sites that are assigned to the section that holds the document. A document with state "released" can no longer be modified. If a released document needs to be change, a new version needs to be created with the function **New Version**. This will create a copy of the existing document and attached document files, the version number will be increased and the status will be set to

"new". As long as this new version will not be released, the previous version of the document will still be shown as the current version on connected sites/ships.

There are two more states a document can have.

**Outdated:** As soon as a new version of a document will be created, previous versions of the same document will get the state "outdated" for indicating that a new version of this document does already exist. Outdated versions of controlled documents will be kept in the database for allowing access to older version of a document.

**Archived:** In some cases you might want to remove a document from the library. Click the button **Archive** and the document will be moved to the archive and will no longer be shown as a part of the current document package. Archived documents are not available for creating new versions.

### 13.2.4 Updating, Distribution of Updates

Document updates will always be distributed automatically to assigned sites/ships as soon as a newer and released version of a document has been flagged for distribution via the **Approve Distribution** command. Whenever a new document will be created and released or a new version of an existing document will be released the system will check the library section assignments for performing an automatic update of already distributed document packages.

**Note:** For some licenses the **Approve Distribution** button won't have any function as the approval for distribution may be automatically given together with releasing a document.

The actual creation of transfer packages will be initiated with the **Send Updates** command. Within the Send Updates dialog you can initiate a transfer to selected sites similar to the normal [Database Replication](#) <sup>234</sup> module.

### 13.2.5 Documents History

Each document has its own history record. The history record shows all stages from the initial creation of a document and the single approval steps. The history is kept per document version. For the history records of older versions of a document see the previous document entries of the document by clicking the **History** button.

You may also compare the content of the current released version of a document with any previous version of the same document in the archive. Click the button **Compare Versions** and you can see a special representation of the current versions including highlighted changes compared to the selected previous version. This special view shows you all changes that have been added to the document but also all content that has been removed.

### 13.2.6 Batch Release

If all documents have been already reviewed, the Batch Release tool can be used for approving and releasing all documents that have not been approved and released yet. This tool can be found under **Tools > Batch Release**. Due to the high impact on the document release



process, this feature is available to users only if they have the "release document" access right.

### 13.3 Using Word as Editor

Instead of the integrated text editor you may also edit your documents in Microsoft Word. If Word is installed on your computer, the **Edit in Word** button is available via the **Tools** tab.

For opening a document in Word you'll need first to start the integrated editor. In the **Tools** tab you'll find the button for opening the current document in Word. After editing the document in Word, save the temporary file, close Word and the updated version of your document will be loaded into the integrated document editor.

**WARNING:** This feature is still experimental. There are some known issues where some edits done in Word can't be properly imported back to the integrated editor (e.g. pictures inserted in Word get lost when re-importing the updated document into the integrated editor).

### 13.4 Document Editor

Beside the management of existing document files you may also create documents with the included text editor.

The editor is a simplified word processor with a streamlined set of editing features. It provides basic features for writing and formatting text, inserting pictures and creating tables.

For a consistent presentation of all documents created with this editor, a predefined style sheet has been delivered with the software package. Instead of modifying the font attributes of selected text you should always prefer the assignment of one of the pre-defined styles available via the **Style** selection in the menu. In some cases you may also have access to company defined styles via the **Format** menu. This selection is available only if extra styles have been defined in your company.

In the **Tools** section of the editor you will find a selection of pre-defined tools to be used especially for managing documents converted from other sources. The type of tools available here depends on the data converter used for importing the data from the 3rd party system. Usually you'll find here tools for aligning the font attributes and table layouts with the pre-defined style sheets coming with the package.

### 13.5 Reports

This chapter describes the available document management reports.

#### 13.5.1 Documents To Be Released

Via the menu **Lists -> Document to be Released** you can call up a list of all documents that haven't reached the "released" status yet. Choose one of the documents shown in the list and click **Go to** to call up the related document and for getting access to the approval functions.

### 13.5.2 Expiring Documents

Each controlled document allows to enter an expiry date. Via the menu **Lists -> Expiring Documents** you can call up a list of all documents that are already expired or that will expire within the next 30 days. Choose one of the documents in the list and click **Go to** to call up the document details.
















## 14 Audit and Inspect



One of our recent releases contains the new module “Audit & Inspect”, which allows an interactive follow-up of any finding during a 3rd party inspection.

Historically this was done by i.a. Designated Persons Ashore using various readily available tools such as MS Excel or other programs for tracking the finding to a complete close-out. The difficulty here is simply the collection of all applicable corrective action that has been initiated for an individual finding, let it be an Observation or Non-Conformity, plus keeping track of all related communication, typically in a different program such as MS Outlook.

“Audit & Inspect” is combining all record keeping and communication collection plus allows the person in charge to assign due dates and responsibilities for corrective action, which is an essential quality aspect in today’s demanding shipping industry.

### 14.1 Overview Configuration

Function	Description
<a href="#">Root Cause &amp; Analysis -&gt; Root Cause Categories</a> 	Manage Root Cause Categories.
<a href="#">Root Cause &amp; Analysis -&gt; Root Causes</a> 	Manage Root Causes.
<a href="#">Root Cause &amp; Analysis -&gt; Risk Assessment Data</a> 	Manage Likelihoods, Severities, Risk Level and Risk Matrix.
<a href="#">Root Cause &amp; Analysis -&gt; SIRE Reference</a> 	Manage SIRE Reference.
<a href="#">Root Cause &amp; Analysis -&gt; Accountability</a> 	Manage Accountability.
<a href="#">Audit Types</a> 	Manage Audit Types. Assign Item Categories, Item Groups etc.
<a href="#">Audit Type Groups</a> 	Manage Audit Type Groups.
<a href="#">Item Category</a> 	Manage Item Categories. Assign Action and root cause handling.
<a href="#">Item Status</a> 	Manage Item status.
<a href="#">Item Standard</a> 	Manage Item Standard for grouping and versioning Item Groups.
<a href="#">Item Groups</a> 	Manage Item Groups.
<a href="#">Item Number</a> 	Manage Item Numbers.
<a href="#">Sites (Specified Use)</a> 	Assign sites to specified use - here use in Audit and Inspection module.
<a href="#">Regions</a> 	Manage Regions.
<a href="#">Position</a> 	Manage Positions.

Function	Description
<a href="#">Audit Configuration</a>  50	Manage general audit configuration.
<a href="#">Assign my Ships</a>  72	Select your ships.

## 14.2 Add Inspection Report

Use button “New Inspection Report” and choose type of inspection/audit you wish to report. Select correct “Audit Date”, fill fields for “Port” or “Location”, “Auditor”, “Report Number” and “Master”. Use button “Get Title” and system will create correct report title based on the given information [Ship – Type of Report – Port – Date].

Optionally a description can be inserted or attachments can be added.

**Note:** Also inspections without any findings can be reported in the system. In this case select check box “no items found” and the inspection will be closed. Above window can only be saved if either this check box is selected or inspection items are added.

### Add Inspection Items

Use “New” and choose correct item category. For every inspection type the system will show you the applicable item categories. With choosing the Item group the available Item numbers are visible. Choose the correct one. Add a title and a description. The “Consecutive Number” is arbitrary with number and letter as in your company defined. Optionally attachments can be added.

With “OK” item will be saved. Title of this item is built by system for instance as follows (depending on company configuration):

Item Category – Ship – Site (where item was created) – Year – Running Number

Depending on your access rights you can also assign the Responsible Person and the Due Date. This assignment is usually done by office site.

### 14.2.1 Follow up Items

Use “Follow Up” for making any changes on item. With status “completed on board” the item will be closed. It is mandatory to add a comment in order to save the changes in the item.

**Note:** If no responsible person and due date are assigned by the time of completion, system will set current user and date instead.

Closing on board: If all items from an inspection report are closed, the complete inspection report moves under folder “Closed Inspections” in folder with year of the closing.

Closing in office: To enable a better tracking from office side it was decided that each item which was completed on board has to be closed/confirmed by the office again. An additional comment/closing remark can be added as well. If all items from an inspection report are completed in the office, the inspection report moves under folder "Final Verification" where it has to be finally approved and completed by Higher Management.

### 14.2.2 Complete Inspection Item

Go to 'Follow Up' and select status 'completed on board'. It is mandatory to add a comment in order to close the item. After clicking on 'save', item will be closed.

Note: If no responsible person and due date are assigned by the time of completion, system will set current user and date instead.

**Closing on board:** If all items from an inspection report are closed, the complete inspection report moves under folder "Closed Inspections".

**Closing in office:** To enable a better tracking from office side it was decided that each item which was completed on board has to be closed/confirmed by the office again. An additional comment/closing remark can be added as well. If all items from an inspection report are completed in the office, the inspection report moves under folder "Final Verification" where it has to be finally approved and completed by Higher Management.

### 14.2.3 Status of items

Status of each item is indicated by symbol and color.

Red exclamation mark → Item is overdue.
Yellow check – mark → Item is closed on board.
Green check-mark → Item is completely closed
Yellow warning triangle → Either responsible person or due date is missing.
No indication → All in order, Item is in progress.

### 14.2.4 Add Inspection Items

Hit 'New' and choose correct item category. For every inspection type the system will show you the applicable item categories.

**Tab "Details"**

For "Consecutive Number" please ask for Company standards. If you don't know the number, it's possible to let the field empty.

Add a title and a description.

Hit 'OK' and item will be saved. Title of this item is built as follows:

Item Category – Ship – Site (where item was created, i.e. O = Office / S = Ship) – Year – Running Number, e.g. Obs – YSM – O – 11 – 003.

**Tab "Final"**

In configuration is defined, which action is mandatory. Please fill in requested actions.

Tab "Attachments"

Optionally attachments can be added.

## 14.3 Handling in office

**Distribute and Review Inspection Reports**

In some cases office may decide to distribute inspection reports [completely or single items only] which are considered applicable to the fleet (to be done after Final Verification once inspection reports are located under "Fleet Info" folder

All sites are requested to check the folder "Fleet Info" / "new" prior after every data transfer import and review the assigned reports. This review has to be confirmed by pushing the button "Review".

Afterward the report will move under the folder "Fleet Info" / "reviewed" where it will always be accessible for the ship's crew:

In the office all inspection reports will be allocated under the „Fleet Info“ folder until they are reviewed by all assigned sites. Once review is completed on all sites, the report will move to the "Closed Inspections" folder.

**Confirm Inspection Reports**

All inspections with status "completed on board" have to complete in office too. After this the inspection moves to folder "Final Verification".

**Final Verification**

All inspections have a final verification. The inspection is finished after this.

**Distribute Inspection Reports**

Only inspections in folder "Fleet info" can be distributed. All inspections have to be reviewed. Inspection move to folder "Closed Inspections", when all distributing sites are reviewed. Here you can find the inspection in folder of the year where the inspection where closed. All closed inspections can be reopened.

## 14.4 Planned audits

### Add a planned inspection

Inspections can be planned via the report **Planned Audits** by just setting the date for the new inspection which is, however, usually done by office.

Note: If an inspection is already planned you will – after selection an inspection type where you can select the corresponding planned audit and continue as usual. Don't forget to use "Get Title" after filling all fields in order to update inspection title accordingly.

## 14.5 Useful functions

### Search

You may either search via Name, Number or a full text search (also including the description of items). Use "OK" and you will be guided to the selected inspection or item.

In the search form you are now able to show audit details for selected audit by hitting button "show details":

### Select my Ships

Button "select my ships" is beside the button "New Inspection Report". Available in Office only. With "select my ships" system is selecting only ships in tree you selected under ["Configuration - Assign my Ships"](#)<sup>72</sup>

## 14.6 Reports

### Item Overview

The Overview gives you a detailed overview about all inspections and items. In the screen you have the option to either show all entries (in this case just use "OK" as all fields are check-marked per default) or define your loading options by choosing a status, responsible person or set a time frame for reporting date respectively due date.

In the generated list you may sort according to the several column headers (e.g. Due Date) or drag a column header to the top in order to group accordingly. Buttons "Show Details" contain a link to the respective inspection or item.

### Planned Audits

In this list dates for future, planned audits can be set.

### Audit Schedule Overview

Gives an overview about all planned (and the last) audits. If a time frame for a certain inspection type has been set by the administrator, this will also be shown here. For time intervals same principle applies as for annual class surveys, i.e. you have a screen in which inspection has to be completed (shown in brackets), however, anniversary date will not change for forthcoming inspections.

## 14.7 Add a planned inspection

Inspections can be planned via the report described in [here](#)<sup>[210]</sup> by just setting the date for the new inspection which is, however, usually done by office side.

Note: If an inspection is already planned you will – after selection of inspection type (Point 1) – see the following window where you can select the corresponding planned audit and continue as usual. Don't forget to hit 'Get Title' after filling all fields in order to update inspection title accordingly.

## 14.8 Distribute and review inspection reports

In some cases office may decide to distribute inspection reports [completely or single items only] which are considered applicable to the fleet (to be done after Final Verification once inspection reports are located under "Fleet Info" folder).

All vessels are requested to check the folder "Fleet Info" / "new". This review has to be confirmed by pushing the button 'Review'.

Afterwards the report will move under the folder "Fleet Info" / "reviewed" where it will always be accessible for the ship's crew.

In the office all inspection reports will be allocated under the „Fleet Info“ folder until they are reviewed by all assigned vessels. Once review is completed on all vessels, the report will move to the "Closed Inspections" folder.

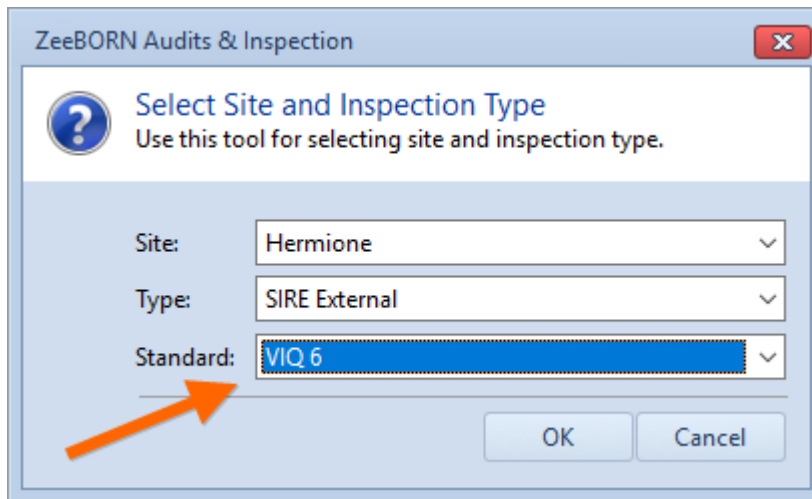
## 14.9 VIQ Versioning (Follow up)

[VIQ Versioning \(TD-AUDIT-O-18-045\)](#)

You are now able to versioning the VIQ item groups and numbers. You can select one standard as default – the default standard is than preselected.

If you want to create a new audit or you want to import SIRE you have to select the used standard:





Only standards with item groups assigned to selected audit are available.

We still need to implement a linking between the several standards for statistics.

## 14.10 Import SIRE

- SIRE Number is recorded
- Master's name is not found in the document and is therefore left blank
- Closing Date is recorded and deposited with deficiencies. As default the current date will be given, but can be overwritten.

## 14.11 Audit Reports

- Loading selection for a report is retained when calling Load again in a report (this we still need to implement for the other safety modules)
- MoU is always offered for reports, but only evaluated if the audit type specifies that regions are used

## 14.12 Audit Status Overview

Provides an overview in which folder the different statuses are displayed

### Office

---

#### Audit Types

- new
- in Progress
- completed on board
- reopened

#### Final Verification

- Status Completed (all deficiencies closed), Audit approved
- Ready for final verification

#### Fleet Info

- Status Final Verification, ready for distributing
- Distributed, not completely reviewed

#### Closed (intern: completed Finally)

- Closed without distribution
- Distributed, reviewed completely

### Ship

---

#### Audit Types

- new
- in Progress
- reopened

#### Fleet Info

- New -> Distributed to this ship, not reviewed
- Reviewed -> Distributed to this ship, reviewed

#### Closed

- Completed on board (all deficiencies completed on board)
- Completed (approved in office)

- Completed Finally (closed without distribution, closed after distribution and review)
- Final Verification









## 15 Risk Assessment


After starting the development of the new Risk Assessment module and presenting it already on our demo servers, the new module has now reached a level of quality and stability that allows us to include the new module into the next ZeeBORN update.

With the update of the ISM code on the 01st of July 2010 operational risk assessment became a mandatory part of the code and all operators had to comply. Although most operators – especially in the tanker industry – followed that best industry practice well before this update of the ISM code came into force, many were struggling with the administrative handling of issues like review schedule, objective evidence for review or distribution of conducted risk assessments in an effective manner. The handling of risk assessment management is from ZeeBORN's perspective an integral part of a complete Management Information System (MIS) and consequently we have developed an additional tool – in close co-ordination with one of our customers based on a major IACS class guidance on risk assessment – in our system to cover this area.

The new module will be released by the end of this year together with the next update of the ZeeBORN Maritime Fleet Management System. All customers who have participated in developing and testing the new Risk Assessment module will receive the license and future updates for free. A demo is already available on our demo server.


### 15.1 Overview Configuration

Function	Description
Hazard Categories	Manage Hazard Categories.
Hazards	Manage Hazards.
<a href="#">Operation Types</a> 	Manage Operation Types.
<a href="#">Operation Groups</a> 	Manage Operation Groups.
<a href="#">Operations</a> 	Manage Operations.
<a href="#">Item Categories</a> 	Manage Item Categories. Assign Action and root cause handling.
<a href="#">Risk Matrix</a> 	Manage Likelihoods, Severities, Risk Level
Merge Hazard Duplicates	Manage Hazard Duplicates.
<a href="#">Configuration</a> 	Manage general Risk Assessment Configuration.
<a href="#">Critical Equipment Type</a> 	Manage critical equipment types.
<a href="#">Further Action Types</a> 	Manage further action types.
Manage SMS Sections and Forms	Assign SMS Sections / Forms in Document Module.

Function	Description
<a href="#">Assign my Ships</a> 	Select your ships.

## 15.2 General

### Select my Ships

Available in Office only. With "select my ships" system is selecting only ships in tree you selected under "[Configuration - Assign my Ships](#)" 

## 16 Task Tracking

---

The Task Tracking module is used for collecting tasks resulting from identified problems. Sources of these problems can be audits, inspections, bug reporting for software modules etc. The Task Tracking module helps to manage the necessary follow up by assigning responsibilities, priorities and due dates. Follow up reports can be attached to the initial report and allow an easy and convenient progress tracking.

This module has been developed initially for fulfilling the documentation requirements resulting from existing quality standards (ISO 900x, ISO 14000, ISM etc.) but can be finally used in all areas where a good organized reporting, solving and documentation of deficiencies is essential.

### Main Features

- Deficiency reporting
- Several views for activities in progress depending on position and responsibilities of the user currently logged in.
- Follow up reporting
- Document management (photographs and other document files can be attached to the deficiency reports and follow up reports)
- Reporting module

### Options

- Report generator with extended reporting capabilities
- Interface to ZeeBORN Support for error reporting and for sending change requests

### Interface

- Interfaces to all other ZeeBORN modules for sending change requests and error reports to ZeeBORN support

### Additional Services

- Data migration from existing systems
- Application hosting via Terminal Server (ZeeBORN data center)

## 17 Master Contracts Management

The Master Contracts Management provides an easy and fast access to master contracts.






In Master Contract Management (short MCM) all contracts with fixed payment dates and payment levels are recorded.

In addition, the term can be defined. For each contract, the notice details can also be entered. On the left side of the screen are all contracts listed.

The contracts can be grouped according to the individual columns. By default, "Site" as the grouping is registered. On the right side are the details of the selected contract are shown.

### 17.1 Configuration

Who can configure the MCM is managed by the user management. All needed configurations are located in Administration. The can be modified directly there or by configuration in MCM.

Function	Description
<a href="#">Currencies</a>  34	Manage active currencies
<a href="#">Cost Categories</a>  35	Manage Cost Categories.
<a href="#">Cost Departments</a>  35	Manage Cost Departments.
<a href="#">Cost Accounts</a>  35	Manage Cost Accounts.
<a href="#">Assign Accounts</a>  37	Assign used accounts to selected ship.

### 17.2 Collection of Contracts

#### 17.2.1 New

All contracts are captured by each site. The name of the contract is freely selectable. It should be noted, that it is significant and unique.

#### Contract Details

Site:	selection of site from the site management
Cost Department:	Selection of the allocated cost department
Cost Account:	Selection of the allocated cost account
Title:	name of the contract
TAN:	Transaction number; contract number
Contractor:	address of the contractor
Remarks:	additional information
Contract Start:	start date of the contract
Contract End:	end date of the contract (leave blank if not known)

All fields contained with a date deposited by a calendar. The title is taken from the field "Master Contract Name". The address of the contractor only can be chosen from the office Manager. If no end date of the contract is inserted, the contract is unlimited.

### Payment Details

Payment Details contains only values that are fixed in the contract. If no amount is specified in the contract, the value remains zero. Only currencies are available that have been chosen in "Currencies". The payment period covers the contractual payment details. In "Date of first payment" has to be entered the date when the first payment is due.

### Notice Details

Each contract can be terminated. Many contracts have a minimum duration. This information is entered in this part of the collection. The exact period of notice will be entered. All possibilities of period of notice can be entered with the correct choice of both variables. The minimum contract period is determined by the "first date notice allowed". Additional information to the notice can be recorded.

## 17.2.2 Commands

Edit:	Each field in the contract is editable.
Delete:	Each contract can be deleted as long as long as no invoice is linked to the contract.
Copy:	Some contracts were similar concluded for different sites. To facilitate the input, the contract data can be copied. The contract will be copied to one or more sites. Apply through the check box "copy booking" all budget entries can be copied too.
Sign Off:	With this function, the notice of a contract will be recorded in MCM and the information throughout ZeeBORN system distributed.
Files:	With this function you can append, show and delete all kinds of files to the contract. With "attach" individual files can only be appended. With Show/Delete attached files can be faced or deleted.
Show History:	The History of all action to the contract will be shown.
Export MCs to Excel	All contracts sorted by site will be exported.

## 17.2.3 Budget

The expected payment amount and the maturity date can be captured. Thereby, in budgeting already forecast for the actual year can be viewed. Once the associated invoices were recorded and paid, the value of the invoice is recorded in the budgeting. The payments are covered in the budgeting come from the periodic budget entries. This feature is only available when the system is on the tab Budget Entries. In this capacity, all possibilities are included for the budget coverage.



---

Add Budget Entry	Any payment can be tracked individually by the due date and amount.
Edit Budget Entry	For each payment the maturity and amount can be changed.
Delete Budget Entry	Each entry can be deleted as long as no invoice is linked to the entry.

## 18 Invoice Registration

The Invoice Registration gadget allows the registration of received invoices without starting the [Purchasing](#)<sup>80</sup> module.

It is also usable for registration of invoices for Module [Master Contract](#)<sup>218</sup> or free Invoices.

### 18.1 Overview Configuration

<b>Function</b>	<b>D e s c r i p t i o n</b>
<a href="#">General</a> <sup>37</sup>	Manage Invoice Registrator Configuration.

Manage Payment Conditions	Payment conditions can be added to each contact. If none are available, a "net value of 30 days" will be entered in the Invoice Registrator.
Send to Accounting (Simba)	An interface to an accounting program. Currently there is an interface to Simba.
Use Customer Number	The system defines a unique number for each contact. This cannot be changed.
Register and approve in one step	The invoice is recorded and confirmed in one step. This configuration must not be used in connection with "Double Approval necessary".
Invoice Number mandatory	The invoice number must always be recorded
Use Prepayment	Prepayments can be entered and edited in the module.
Double Approval necessary	A double confirmation is required for each invoice. The first confirmation is always made by one employee of the purchasing department and they have to assign the invoices to a second employee.

Manage Payment Conditions	Payment conditions can be added to each contact. If none are available, a "net value of 30 days" will be entered in the Invoice Registrator.
Pay Day	A day of the week can be set on which invoices are paid. The payment terms will be adjusted to this day.
Allow invoice date in the future	The invoice date can be one day in advance.

## 18.2 Registration

Use the registration area to capture incoming invoices.

An invoice can either be manually captured or be assigned to a [PO](#)<sup>[362]</sup> or a [MC](#)<sup>[364]</sup>. When you assign an Invoice to an MC or a PO, the existing data such as booking date, total e.g. will be already entered by the system.

A searched MC or PO can be found either on TAN / title or be selected from a list of MCs or POs linked to special supplier.

You can mark an invoice as a credit note, the assigned values will then reduce the budget values.

You can mark an invoice as partially. Please note: an assigned task (PO or MC) is marked as completely invoiced if at least one Invoice is available, which was not marked as partially.

## 18.3 Handling

In the Handling-Area you can find all open invoices. Those invoices are fully editable. All changes will be stored in history.

You can change Assignments, assign to other MC/PO or delete Assignments.

If you approve an invoice then all values will be taken over to budget.

You can also mark an invoice as factually incorrect. The invoice values will not be taken over to budget in this case.

## 18.4 Show Invoices

In this area all invoices are available.

If invoice is already approved, only few changes (e.g. Due Date) can be done. It is also possible to reopen them to editing.

In this case, the data that have already been sent to the budget will be deleted.

## 19 Cashbook

---

The Cashbook module records all accounting transactions for a site while each site may manage multiple cash accounts. Via the ZeeBORN Replication module the data from each cashbook are available online in the office for further review.

### Main Features

- Multiple currencies
- Exchange rate calculation based on up-to-date exchange rates or company defined exchange rates
- Each transaction can be split to different cost accounts
- Each transaction can hold several file attachments (e.g. scanned receipts)
- Automatic replication with office database via integrated ZeeBORN Database Replication module
- Flexible authorization options for cashbook transactions (e.g. book, check, approve, value depending approval levels)

### Options


- Interfaces to several accounting systems
- Migration tools for migrating existing data from 3rd party systems

## 20 Incident Reporting

The incident reporting module is the central place for managing near misses, ship defects, accidents and so on.

### 20.1 Overview Configuration

Function	Description
<a href="#">Environment Data -&gt; Sea State</a> 	Manage Sea State.
<a href="#">Environment Data -&gt; Source of Lighting</a> 	Manage Source of Lighting.
<a href="#">Environment Data -&gt; Wind Direction</a> 	Manage Wind Direction.
<a href="#">Environment Data -&gt; Wind Force</a> 	Manage Wind Force.
<a href="#">Environment Data -&gt; Weather Type</a> 	Manage Weather Type.
<a href="#">Root Cause &amp; Analysis -&gt; Root Cause Category</a> 	Manage Root Cause Categories.
<a href="#">Root Cause &amp; Analysis -&gt; Root Causes</a> 	Manage Root Causes.
<a href="#">Root Cause &amp; Analysis -&gt; Risk Assessment Data</a> 	Manage Likelihoods, Severities, Risk Level and Risk Matrix.
<a href="#">Root Cause &amp; Analysis -&gt; SIRE Reference</a> 	Manage SIRE Reference.
<a href="#">Root Cause &amp; Analysis -&gt; Accountability</a> 	Manage Accountability.
<a href="#">Incident/Accident Types</a> 	Manage Incident/Accident Types.
<a href="#">Locations</a> 	Manage Incident/Accident Locations.
<a href="#">Positions</a> 	Manage Incident/Accident Positions.
<a href="#">Item Category</a> 	Manage Item Categories. Assign Action and root cause handling.
<a href="#">Accident Types</a> 	Manage Accident Types.
<a href="#">Category (Personal Accident)</a> 	Manage Personal Accident.
<a href="#">Injury (Personal Accident)</a> 	Manage Injury for Personal Accidents.
<a href="#">Item Status</a> 	Manage Item Status.
<a href="#">Configuration</a> 	Manage general Incident Module Configuration.
<a href="#">SDR Defect Categories</a> 	Manage ship defect report categories.
<a href="#">Manage Sites (Specified Use)</a> 	Assign sites to specified use - here use in incident module.
<a href="#">Configure Incident Report Types</a> 	Manage Incident Report Types.

Function	Description
<a href="#">Assign my Ships</a>  72	Select your ships.

## 20.2 Creation of a report

**Please note: All reports can be created only on the vessels.**

You have to choose if you want to enter ship defect report or other.

### Ship Defect

You can either select a component directly from the maintenance system (if available, if not the field will be disabled) or enter a title. Please fill in all relevant data.

### Other Report (for instance near miss, accident)

First you have to select type of report you want to enter. Depending from your choice and the company configuration several forms will appear.

### Data

All available details under tab **Details** have to be filled out.

Most entry fields in the form provide a pre-defined list of values to be used for the report creation. In most cases the values available in these lists can be defined in the systems configuration.

If the reporting person is different to the logged in user, the name can be filled in under "Enter Name".

Additional document files and photographs can be added under tab **Attachment**.

Depending on the company configuration for near miss and/or accident you have to add corrective/preventive actions as free text on the tab **Final** or as single tracked item.

Accident reporting forms contain an additional tab **Accidents** for collecting all occurred damages and personnel accidents.

### Approval on board

Once you collected all necessary details you have to approve the report.

If the ship approved the report, it will no longer appear in the open folder – you find the report now in the approved folder of the current ship. No further adjustments are allowed on board.

Please note: With the regular data transfer all recorded, not approved reports are visible in the office, but read only. They are marked in the office as **OoB** (Open on Board).

Only SDR can be sent via a special data transfer (immediate sending of reports with bypassing the regular data transfer), for further action on office side.

## 20.3 Handling in office

The report is now editable in the office. You can either decide to

- resend the report to the ship due to the request of additional information
- assign To-Do items or Corrective/Preventive Action Items (as per configuration)
- approve the report

### Assign ToDo-Items (office)

If there is a ToDo-Item/task resulting from a Near Miss– or Accident Report, this will be created in the office and assigned to the corresponding site. Assigning a ToDo-Item to several ships will multiply the item (in the office version only), i.e. if 5 ships are assigned for follow-up, the ToDo-Item will be multiplied 5 times, however, the respective site will only see the own ToDo-Items.

Use button “Assign Item(s)” and select the ship(s) which should follow up on this task.

Fill in the details of the task and insert the responsible role and due date [if a responsible person instead of a role should be assigned – go to the (ship-specific) item and use follow-up button].

### SDR only

If the ship is chartered, the office can insert the charterers contact details into the report. To inform the charterer about the SDR the button “send to charterer” can be used.

The report can be sent with or without attachments. Reports forwarded to charterer will be shown in green/italic letters in the tree.

Once feedback from the charterer is received, the report can be sent back to the ship for “Report Tracking” – use button “Resend to ship” and the report will be re-opened on board (extra folder “SDR – For Follow Up”).

## 20.4 Follow-Up of ToDo-Items (ship)

All reports with approved ToDo items will be shown on board in folder “For Follow Up”.

Use button “Follow Up” for updating the status and details of the relevant tasks. Some status changes (e.g. closing a task item) require the input of an additional follow-up comment.

Closing on board: If an item is completed, the complete inspection report moves under folder “Closed Inspections”.

## 20.5 Follow-Up of ToDo-Items (office)

Closing in office: Each item closed on board still needs to be confirmed by the office. The item will be finally closed by setting its status in a final follow-up to “completed”. An additional comment/closing remark can be added as well.



## 20.6 Distribution of the reports

If all items (To Do items and corrective action items) are closed, the report can be distributed. If a To Do item was assigned to a ship, this ship will automatically be on the distribution list. If the report is distributed to other ships as well, those ships will only see the report as such without the To Do item.

Reports without items can be distributed immediately after approving in the office.

Reports can be distributed to the fleet using the Distribution features of the module (for read/review).

Reports that are specifically distributed for review will be allocated under folder "For Review" on board (folder "Fleetinfo" in the office).

A report under folder "For Review" has to be reviewed by the vessel within a defined time period. On the right side under 'Distributing Sites' you will see the date of distribution by the office and the due date for review by the vessel. When the report is reviewed (use button "Review"), the review date will be saved and the report will move to folder "Fleetinfo" (except for own report which will move to folder "Closed" on board).

Reports which are distributed for read will be closed in the office (Folder closed) and saved on board under folder "Fleetinfo".

If all ships reviewed the report, it will be closed after data transfer.

You can also decide to close the report without distribution.

## 20.7 Useful functions

### Search

You will find the Search Function under Button **Actions**.

You may either search via Name, Number or a full text search (also including the description of items). Use "OK" and you will be guided to the selected inspection or item.

### Legend

Under Button **Action** you will find the **Legend**. Legend gives you an overview about used icons and their meaning in the system.

### Select my Ships

Available in Office only. With "select my ships" system is selecting only ships in tree you selected under "[Configuration - Assign my Ships](#)"<sup>72</sup>



## 20.8 Reports

### Overview per Interval

The Overview gives you a detailed overview about all reports. In the screen you have the option to either show all entries (in this case just use "OK" as all fields are check-marked per default) or define your loading options by choosing a site, interval or report category.

## 21 Drugs & Alcohol

### 21.1 Overview Configuration

Function	Description
<a href="#">Specified Use</a> 	Assign sites to specified use - here use in drugs & alcohol module.
Days until next external test	
<a href="#">Assign my Ships</a> 	Select your ships.

### 21.2 Request Test

To request an internal test by the office hit the button "Request".

In the next form select all ships/sites and all roles for which the test is to be performed and enter a test date.

The requested test will appear in the folder open. In the office they will appear with the prefix OOB - that means, that they are not editable in the office as long as they are not approved on board.

On board the tests are available after the next data transfer and immediately editable.

### 21.3 Edit Test

Hit the button "Edit/Report Test" and enter the requested information.

You can either select a port from a given list or enter a port which is not available in ports list.

#### Add/edit donors:

To add or edit a donor please hit the button "Add/edit donor".

Please note: if the test is requested only the requested ranks are available.

If the test is an external test, all ranks are available.

Please select the corresponding rank, enter name of the crew member and the result.

If the result is negative, the value is automatically 0 and will be disabled.

When all requested ranks are filled in, the test report can be approved on board.

If not all ranks can be tested, you have to fill in an approval remark.

## 21.4 Additional Test

An additional, not requested test can be entered.

The Report layout is the same like report requested test. Hit "Report Additional" and fill in all fields. For field Rank all ranks will be visible.

Follow the instruction from [Edit Test](#)<sup>229</sup>.

## 21.5 External Test

Hit "Report External" and select correct Collection Date, fill in field for Port (select port- list of predefined ports; enter port- a free text field), the number of Samples and result. Optionally remarks can be inserted or attachments added.

## 21.6 General

### Select my Ships

Available in Office only. With "select my ships" system is selecting only ships in tree you selected under "[Configuration - Assign my Ships](#)"<sup>72</sup>

## 22 Drill Plan

---

### 22.1 Overview

In the open Drill Plan module you can see all Drills.

It is possible to change the view. Select single groups to see only all drills of a group or select special types to see only all drills of this type. Predefined is the view of all drills.

**The folder “To be executed” is separated in three different folders:**

- Previous – all drills had to be executed in the past
- Actual - all drills of this month plus two weeks
- Next – all drill have to be execute in the future

Only folder with drills inside will be visible.

#### **Select my Ships**

Available in Office only. With "select my ships" system is selecting only ships in tree you selected under "[Configuration - Assign my Ships](#)"<sup>72</sup>

### 22.2 Planned Drills

Choose drill from previous, actual or next folder and hit “Report Planned Drill” and fill in the details.

#### **Tab "Details":**

Please fill in execution date and time, number of present and number of absent crew.

If absentees are available you have to enter their name and rank.

Choose via check box in part drill details all details which are depend on this drill. “Completed satisfactorily” is chosen per default and if the drill wasn’t completely satisfactorily you have to fill in the deficiencies.

Fill in additional information and description of de-briefing.

#### **Tab "Emergency Equipment Condition":**

Select the equipment you used in the drill and enter condition:

G – Good

R – Requires attention

D – Details attached

Fill in all Emergency Equipment Conditions of all used equipment. A remark per Equipment is mandatory if R or D is selected.

#### **Tab "Attachments"**

Optionally attachments can be added.

### **Save Report**

After saving the report it will appear under the folder “Open”. As long as you not have approved the report, you can change the details.

### **22.3 Approve (on board)**

Please note: only reports you have approved are editable in office. Once you entered all necessary details hit button “Approve (on board)”. After the approval the report will appear under the folder “approved” and will be no longer editable on board.

### **22.4 Unplanned Drills**

Hit button “Report unplanned drill” and choose drill. All drills are sorted by drill group. Follow the instruction from Chapter 2 for entering the details.

### **22.5 Reports**

- Differences between Planned and Execution Date

## 23 Tools

---

ZeeBORN provides a series of additional tools for specialized tasks. Most of the tools are not included with the standard setup and need to be requested separately from [ZeeBORN Support](#).

All of the tools mentioned below need to be copied to the \bin directory of the local client software installation on a PC.

### 23.1 Shared Modules

Beside the main modules like Crewing and Budgeting there are also some so called "Shared Modules" that will be used by more than one of the main modules. A typical example is the MiniMail module. This module is used by more or less every main module in the ZeeBORN system.

The Shared Modules section describes all these modules that are part of the main modules.

#### 23.1.1 MiniMail

The MiniMail module is an alternative e-mail client for sending e-mails. In it's current version it's still not a full replacement for a standard e-mail client but it prevents the need of developing interfaces to all major e-mail clients currently available on the market.

##### What it does

- It simplifies the process of sending e-mails.
- Sending of e-mails to one or more recipients.
- Support of attachments.
- Support for using `cc` and `bcc` for addressing.
- Sent e-mails will be stored in the system for an easier access to all e-mails that have been sent with the ZeeBORN System.
- The sending of newsletters is supported.
- Distribution lists (Mailing Lists) are supported.
- All e-mails sent by using the MiniMail modules will be saved in a central database. E-Mails saved to more than one recipient will be stored only once and will be linked to all relevant contacts.

##### What it doesn't do

- MiniMail supports simple text messages. Text formatting and inserting of images within the text is not supported (attaching images as files is of course supported).
- MiniMail currently doesn't receive e-mails. You will still need an e-mail client for receiving replies to your e-mails. The receiving feature is still under development and will be a part of the next release - then you use MiniMail as a full replacement for your existing e-mail client.

## 23.1.2 Database Replication

The Database Replication module handles the synchronization of database modifications between office sites and remote sites like ships or other offices.

The Database Replication process is usually set up as an automatic process and does not require any manual interaction.

Your company may also use a user specific version of the Database Replication module. In this case you will find the description of the Database Replication in a separate document. Please ask your system administrator.

Please read also topic [Checking Correct Time and Time Zone Settings](#)<sup>[11]</sup> for details about the impact of wrong time settings on the data replication process.

### 23.1.2.1 Transferring changes to other sites

The following procedure is required only if no automatic data replication has been configured.

After starting the Replication module you will see a list of sites you can send data updates to. On board of ships or in side offices you will usually see only the head quarter as the only available choice. Check all sites you want to send and update to and choose the data to be included in the transfer.

There are two main transfer options:

**Standard transfer without documents:** Many parts of the ZeeBORN system allow the attaching of additional files (e.g. adding photographs to a maintenance report, all document files managed in the Documents module, scanned copies of invoices attached to invoice entries in the Invoice Registration module). As there is no real control over the size of the attached files, the standard data replication concentrates on database entries only.

**Transfers including documents:** From time to time you may want to replicate also all document files managed in the system. Due to the usually larger size of data replication packages including document files the Replication module provides the option **Include documents**. As soon as this option is selected, the data replication module will check the last date when document files have been sent and will include all new or modified files in the new replication package. Instead of the normal transfer via e-mail or a direct Internet connection you may want to choose the transfer on a USB stick for transferring the data.

### Transfer Types

**Regular Update:** Regular updates just check the date of the last transfer and will create replication packages with all the data that have been newly created or modified after the last transfer. This is the transfer type you will use most of the time.

**Full Transfer:** In some cases it could be necessary to transfer all the data available to a site. Usually you will need to send a full transfer to a site if this site has been installed for the first time (this transfer type will be used automatically by the Replication module if no transfer has

been sent before). Another situation where a full transfer can be necessary is the restoration of lost data on a damaged PC.

**Recover:** The recover option can be used in cases where you detect missing transfer packages. A typical example is a data replication package that got lost while sending it via e-mail. Usually you will detect a missing replication package while trying to import a newer replication package. The import tool detects the missing replication package and will provide as a information what date shall be used for requesting a recovery transfer. When using the Recover mode you will also need to enter a date that will be used to find all new entries and changes in the system that have been added after this date.

### **Sending Transfer Packages**

While using the Replication module in manual mode, only the replication packages will be created after clicking the button **Create Package(s)**. After clicking the button **Open Export Folder** the Replicator module will open the export folder in Windows Explorer. At this stage you are free to decide how you want to transfer the replication package(s)

#### **23.1.2.2 Importing changes from other sites**

The following procedure is required only if no automatic data replication has been configured.

All data transfer packages will be transmitted as files with the extension `.replic`. The import of these files can be initiated by double-clicking on the file or by opening the attachment if it has been received via e-mail. The import tool will guide you through the simple import process.

#### **23.1.2.3 Missing Import Status**

The "Missing Import Status" report can be accessed in the Data Replicator main window via the menu **Tools > Missing Import Status**.

The report gives you an overview for all transfers sent to other sides that have not been imported yet. By default, the overview only shows the last 120 days of missing imports, but you can press the **Show All Entries** button for all missing transfers recorded in the system.

Via the package ID shown in the list you can track the transfer file used for sending the data updates to another side. After correcting a transfer problem, you may use the **Delete Selected** button for removing the entry from the list.

#### **Possible reasons for missing imports:**

- data transfer file lost during transmission to other side: Please check your system used for transferring the transfer files to your external sites. If the transfer file did not arrive as expected, please consider a re-transfer of the missing data by using the **Recover** option while sending updates.
- data file arrived but couldn't be imported: If the data file got corrupted during the transfer or anything else happened that prevents the import of the transfer file, you should have a look into the log files created for each import transaction. As this can get quite technical at this stage, please do not hesitate to contact our [support](#) <sup>366</sup> team for getting assistance.



### 23.1.2.4 Automatic Database Replication

The system provides additional tools that allow to set up an automatic data transfer between the office and the connected sites. There are two main options for setting up the automatic data transfer:

**Option 1)** Data replication packages will be automatically created and imported at defined intervals. The actual transfer of those files will be still organized by the customers IT department by using the existing infrastructure for transferring the files between office and sites.

**Option 2)** In addition to option 1) also the transfer will be handled by ZeeBORN tools. For the data exchange between office and sites a dedicated ZeeBORN server will be used for forwarding all files to the other site.

The rest of this topic will concentrate on option 2.

#### Preparation

For enabling the automatic data transfer, you will need to download some additional tools that contain the required functions for establishing the connection to the ZeeBORN server. Please contact [support](#) for download instructions.

With the tool **ReplicatorConfig.exe** in folder `%zeeborclient%\bin` you can choose the sites you want to enable to automatic transfer for. After checking all sites you want to enable, click **Save** for updating the replication configuration. This step can be skipped on board as the transfer from board will always be sent to the office.

In the download package received from [support](#) you will find a file **ftptransfer.cfg**. Please copy this file into folder `%zeeborndata%\config`. This file contains account information for accessing a dedicated file exchange account on the ZeeBORN server.

In the same package you will also find the files **SFTPUpload.exe**, **SFTPDownload.exe**, **DataUpload.cmd** and **DataDownload.cmd**. Please copy those files to folder `%zeeborclient%\bin`.

#### Configuration

The execution of the data replication file will be controlled via the Windows Task Scheduler. Create a new task that runs the batch file **DataUpload.cmd** at a preferred interval. The interval for the automatic data transfer should be set to no more than once a week and no less than every four hours.

Create a second task that executes the batch file **DataDownload.cmd** at a similar interval like the upload task. Please make sure that upload and download don't run at the same time. If you use the minimum interval of 4 hours, there should be a gap between upload and download of 2 hours.

#### Monitoring

If any error occurs during an automatic data transfers, a separate entry will be created in log file `%zeeborndata%\logs\errors.log`. If this errors.log file doesn't exist, the transfer is running without problems.

If the file errors.log exist, please check the file for a first indication of the reported problems. Further information can be found in the detailed logs in folders ReplicationImport\*, ReplicationExport\* and ReplicationImportSys. The status of the replication system can also be checked by starting the Replication module manually and checking the dates of last import and export.

### 23.1.3 Report Designer

*This tool will be made available to customers only in special cases.*

The ZeeBORN Report Designer is an in-house tool for preparing the layouts for printouts to be used by the print and reporting functions of the ZeeBORN modules and applications.

All data of a report will be stored in .report files. In addition there is a .layout file containing the visual presentation of a report.

The Report Designer is used for creating .report and .layout file. Usually you will have to take care about the .report files - the .layout files will be maintained automatically by the designer.

#### 23.1.3.1 General Data

The General Data screen allows a short description of the purpose of a report. None of the information entered here affect the operation of the report.

#### 23.1.3.2 Variables

The Report Designer allows the usage of variables for a higher flexibility in using this module. Report variables can be used in the database root value of the report (e.g. providing the IMO number of a vessel for accessing the related database) and in the SQL query.

Each variable defined in a report can have a default value. This value will be used if the calling application doesn't provide a value for this variable. It's also a good practice to enter a value that will provide suitable data for the preview function of the layout editor.

#### 23.1.3.3 Data

In the Data screen you can define the database root to be used by the report and you can define the SQL query to be used for retrieving the report data from the database.

You can use the **Test Query** function to see the results of the query before starting the layout editor.

### 23.1.3.4 Designing the Layout

The layout of the report can be designed in a WYSIWYG editor. On the left side of the editor you have access to all elements that create the structure of the report (e.g. master bands, details bands, headers, footers etc.) and you also access to the properties of the currently selected element in the design view.

The right side of the editor gives you access to the data the result from the query defined in Data screen of the editor. The data of the query will be presented as the columns that are in the result of the query.

### 23.1.3.5 Testing a Report

A report can be tested by using the preview function in the layout editor or by using the **Print** function or the **Create PDF File** function.

Please note that the PDF creation function available in the preview screen of the layout editor is not the same that will be used by programs that embed the functionality of the reporting tool.

The **Create PDF File** function uses an improved PDF creation module for the file creation and is exactly the same function the will be used by ZeeBORN applications for creating PDF files.

## 23.2 Cleanup

The Cleanup tool removes all files no longer required by the ZeeBORN system and also removes other files that do not belong to the system.

All the following files will be deleted:

- log files older than 2 years
- all files in %ZeeBORNDATA%\temp
- all files in %ZeeBORNDATA% having the string "copy" as part of the file name
- all files with the following extensions: \*.zip, \*.rar, \*.cab, \*.bak
- all files in %ZeeBORNDATA%\Backup (those files are usually required only if something goes wrong during a software update)
- files older than 2 months in %ZeeBORNDATA%\Replication files

The tool can be started with the /AUTO parameter for skipping the initial dialog.

## 23.3 XRateUpd

The tool XRateUpd can be used for downloading current exchange rates and update the ZeeBORN database with the downloaded values. It's main purpose is to allow the updating of exchange rate values outside of the ZeeBORN software, either manually or even automatically via a Task Scheduler task.

### Installation

As the tool is not part of the installation package, the tool needs to be downloaded at <https://downloads.zeeborn.net/XRateUpd.zip>.

Extract the downloaded archive to folder [%ZeeBORNClient%](#)<sub>363</sub>\bin (e.g. C:\Program Files (x86)\ZeeBORN\bin).

### **Usage**

For manually updating the exchange rates, just start the tool and follow the instructions given by the tool.

If you want to set up an automatic updating of exchange rates, you can create a task in Windows Task Scheduler service.

While creating the task, you'll need to add the command line parameter **/AUTO**.

You'll also need to make sure that the user account used for running the task is also able to run any other ZeeBORN software on the same station.

## 24 Tutorials

---

### 24.1 Tutorials English

This is the English language section of the ZeeBORN tutorial collection.

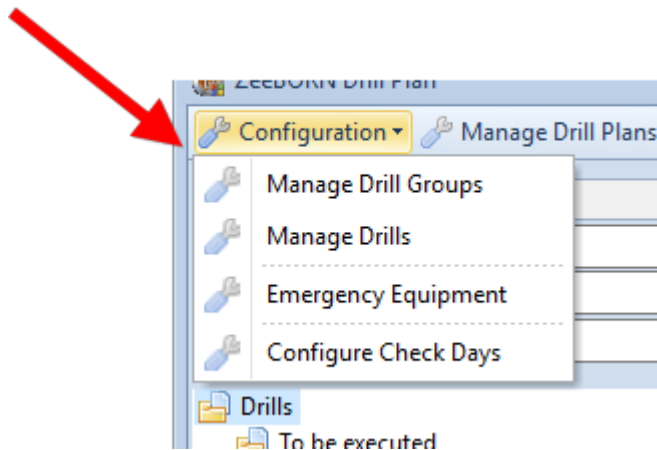
1.

#### 24.1.1 Drill Plan Standalone Version (eng)

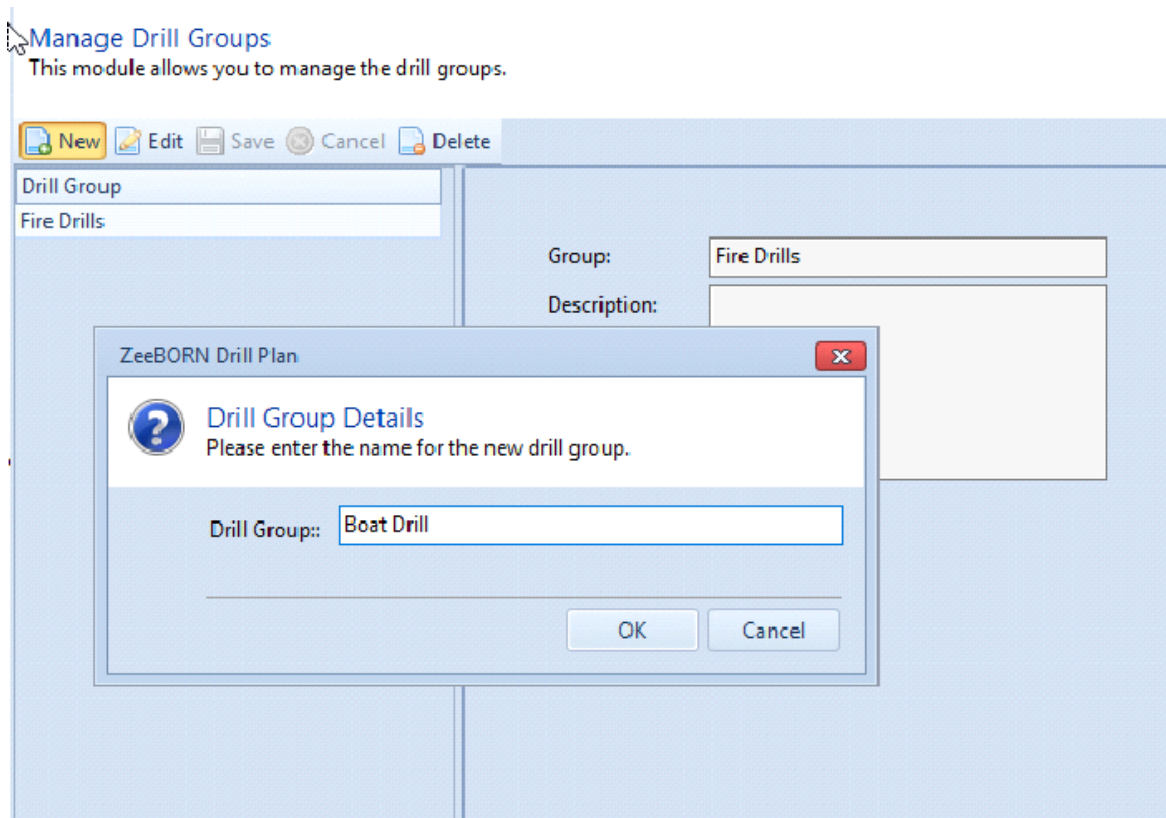
##### Configuration

---

Before using the system, you have to do some configurations. In the configuration area hit button **Configuration** according to your user right.



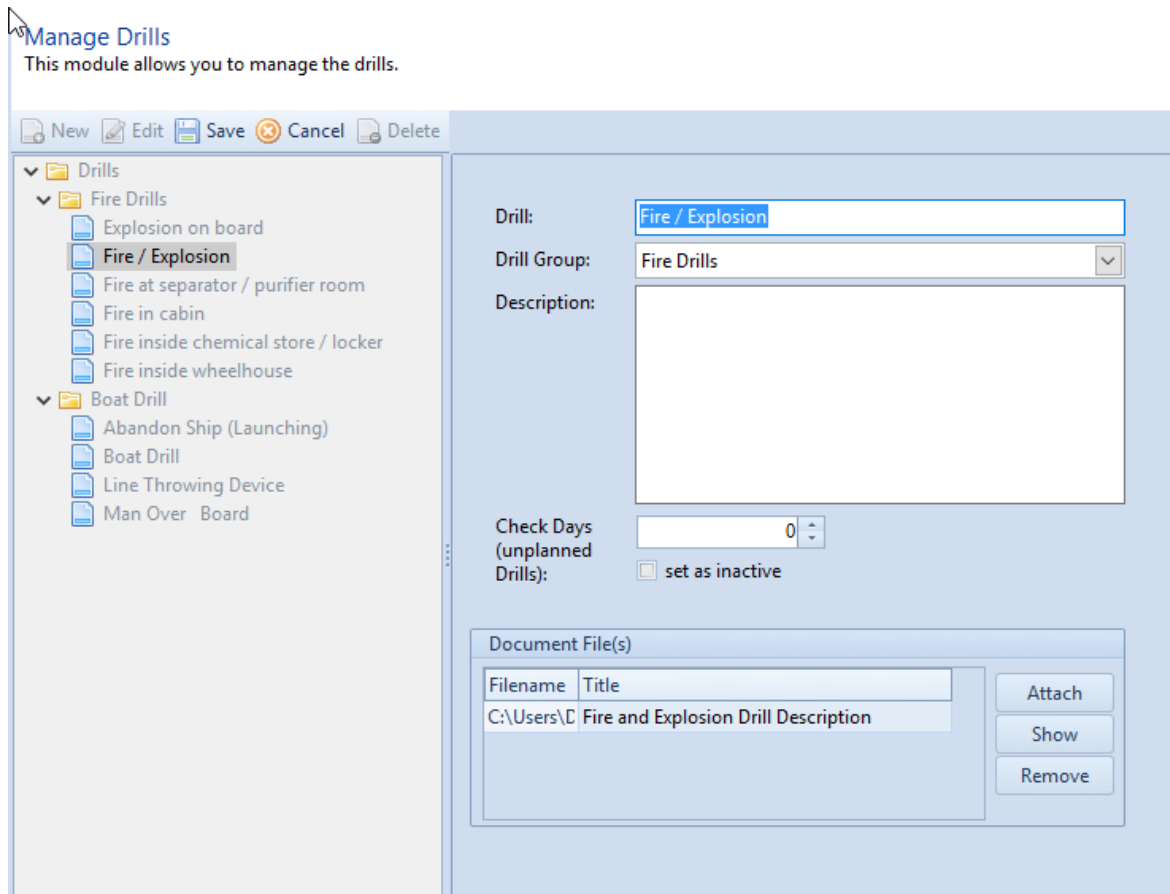
##### Manage Drill Groups



Hit button **New** to enter a Drill Group and perhaps add a Description. Confirm it with **Save**.  
Remark: You can only delete Drill Groups which are not be used in the system.

### **Manage Drills**

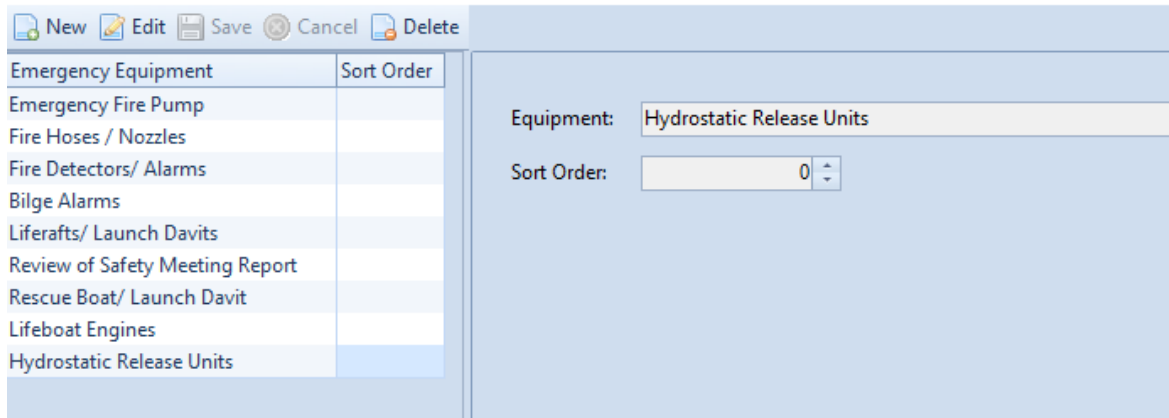
In the next step, all drills have to be insert which are to be manage in the system.



Drill	Drill name
Drill Group	selection of the drill group which created before
Description	Description
Check Days (unplanned Drills)	will be record an unplanned drill, the systems checks if there is a planned drill in the specified period with +- check days – and the planned drill will be shown.
Document File(s)	Attachment(s) per Drill

## Emergency Equipment

Management of Emergency Equipment. The handling of the Drill module will be trained here.



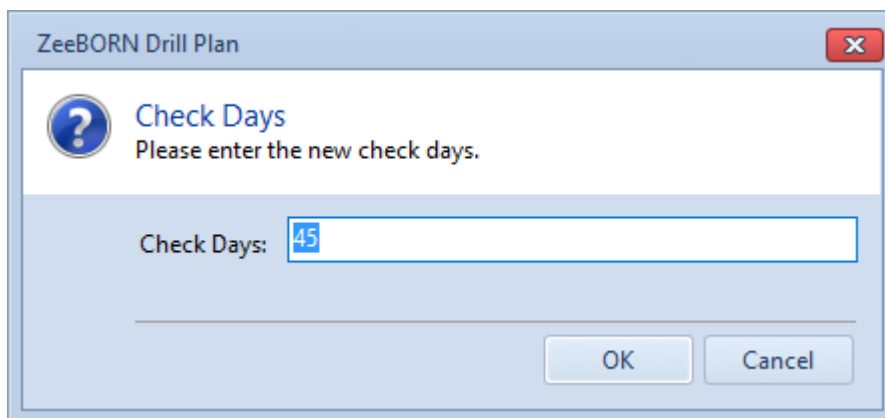
The function **Sort Order** could be used to sort the items.

### Configure Check Days

Here, you can configure Check Days for drills. The drills carried out are linked in the tree and will be displayed in the 3 following subfolders:

- Previous
- Actual
- Next

The sort into the right folder depends on Check Days.

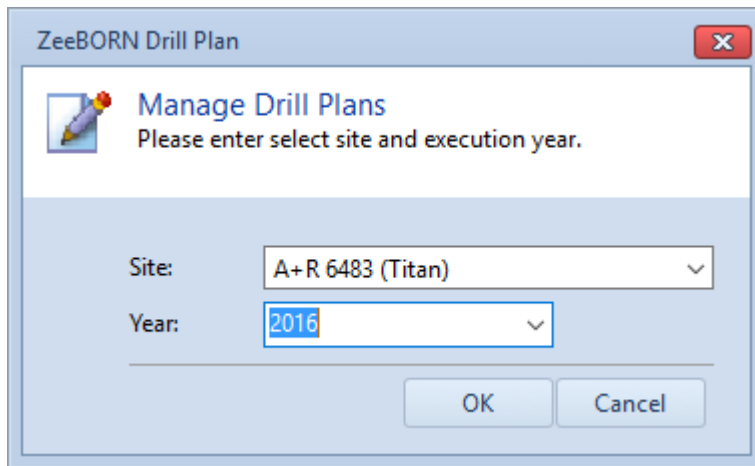


### Manage Drill Plans

Now you can configure the annual drill plan. This means to determine which drills will be executed within one year. Use **Manage Drill Plans** to display the Drill Plan.

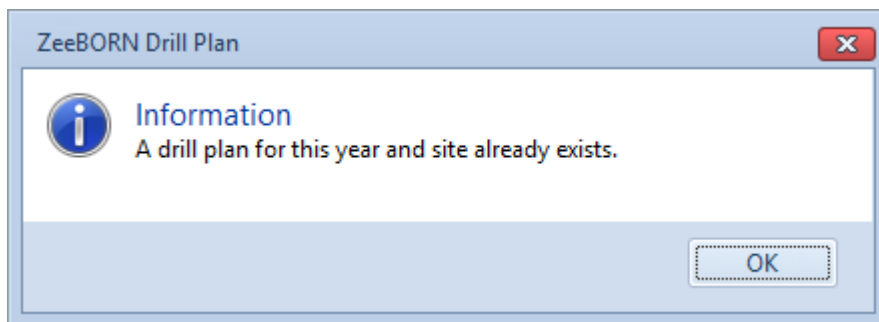
At first please enter **New Drill Plan**. After this select the execution year.





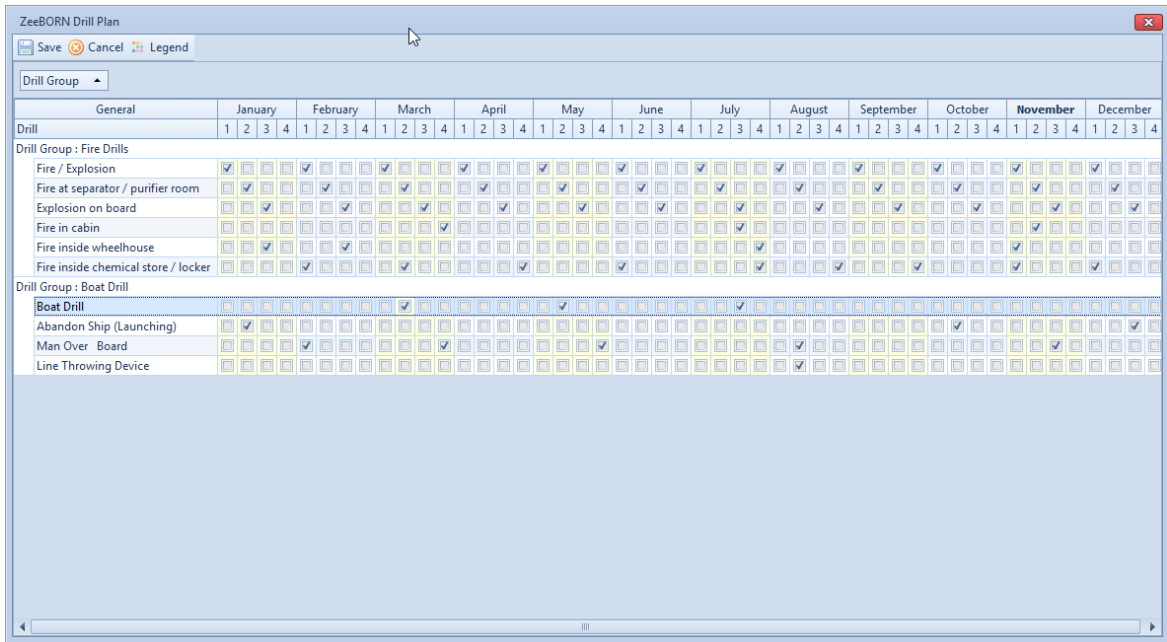
The image shows a dialog box titled "ZeeBORN Drill Plan" with a close button (X) in the top right corner. The main content area has a header "Manage Drill Plans" with a pencil icon and the instruction "Please enter select site and execution year." Below this, there are two dropdown menus: "Site:" with the value "A+R 6483 (Titan)" and "Year:" with the value "2016". At the bottom, there are two buttons: "OK" and "Cancel".

You will receive an error message (information) in case of a drill plan already exists for this year.



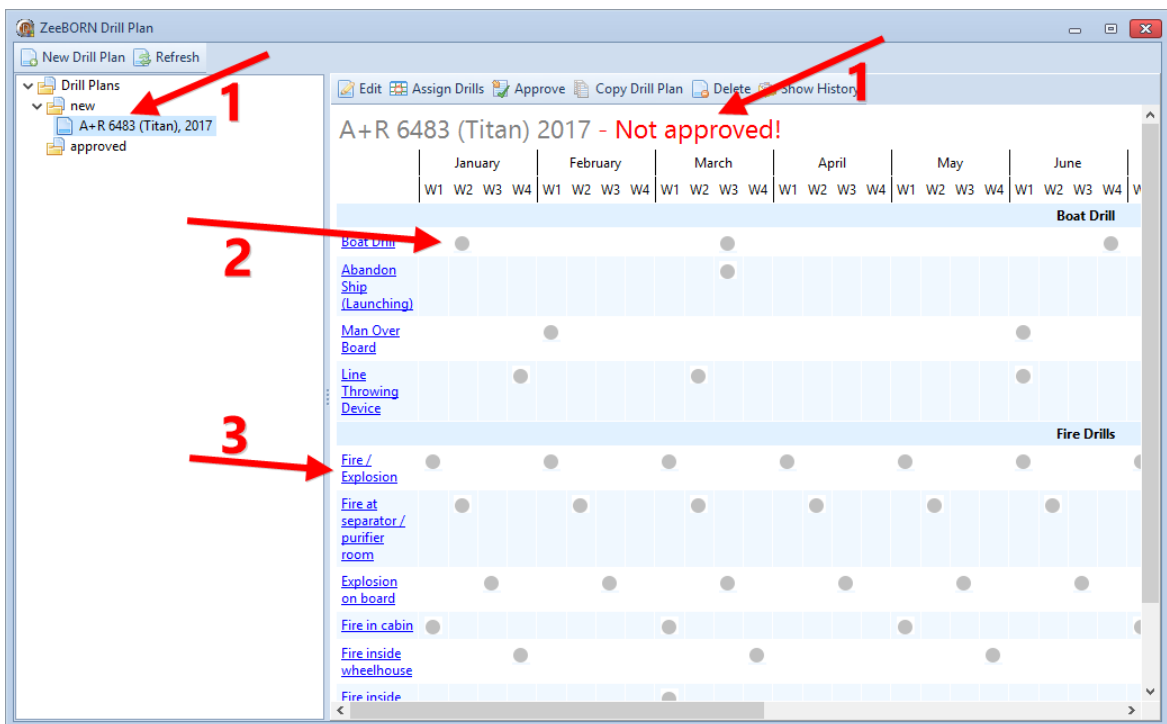
The image shows a dialog box titled "ZeeBORN Drill Plan" with a close button (X) in the top right corner. The main content area has a header "Information" with an information icon (i) and the message "A drill plan for this year and site already exists." At the bottom, there is a single button: "OK".

This function is used to select the drill in which week of the month or in which month it will be done. The overview shows all months with 4 weeks.



Hit button **Save**.

The generated plan is visible in the tree now.

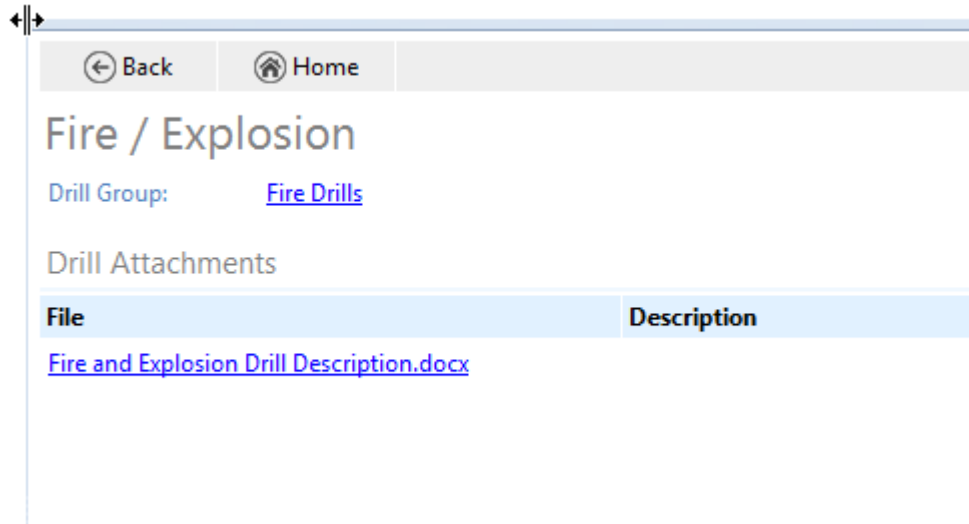


The generated drill plan has not been closed yet and can be further edit (1).

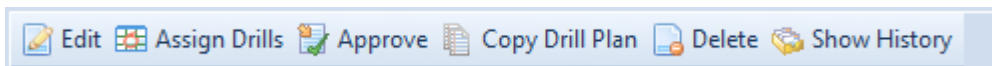
All selected drills are marked in grey (2) because they have not been reported yet. In case of viewing drills colored in red so this means that drills are overdue.

The reporting of drills is not possible at that time because the drill plan has not been approved yet. So you have the chance to generate the drill plan for the next year in time, as the plan will be shown not before approving.

Hit button "Drill Name" (3) for receipt of additional information per drill that were saved in the configuration (i.a. selected attachments).



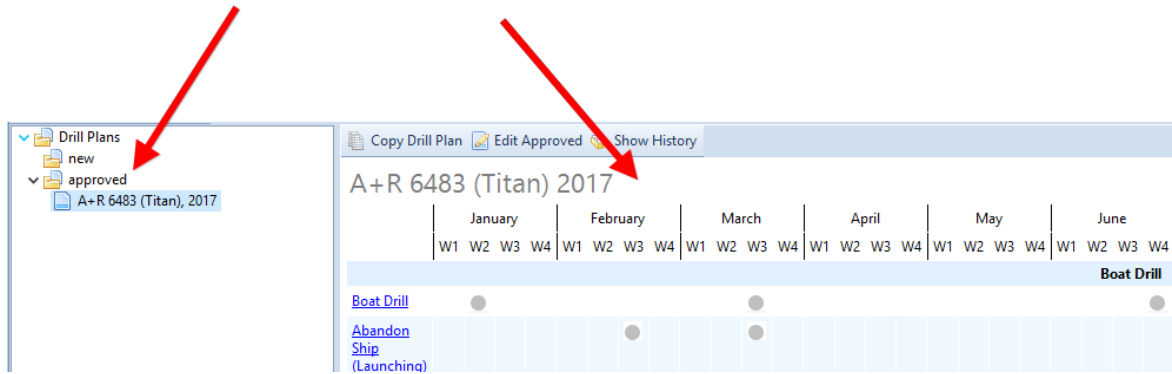
With following button, the plan can be edited.



Edit	To change the year of the drill plan
Assign Drills	To adjust the selected drills or assignment of additional drills
Approve	The drill plan will be approved. Now plan is available and can be reported in the system
Copy Drill Plan	To do a copy from the drill plan to another year
Delete	As long as the drill plan is not approved, it is possible to delete the drill plan
Show History	View of history of drill plan

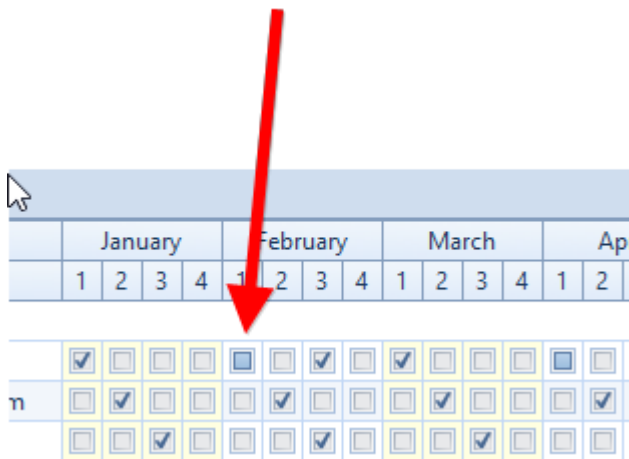
The process **Assign Drills** will be closed after approving.

The Drill Plan is shown below in folder **approved** in the tree.

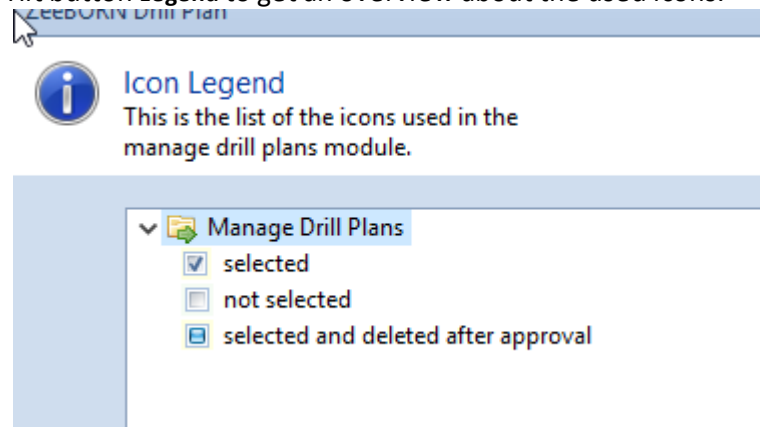


The button **Edit approved** is available under **approved**. Only in exceptional cases it is possible to edit an approved drill plan.

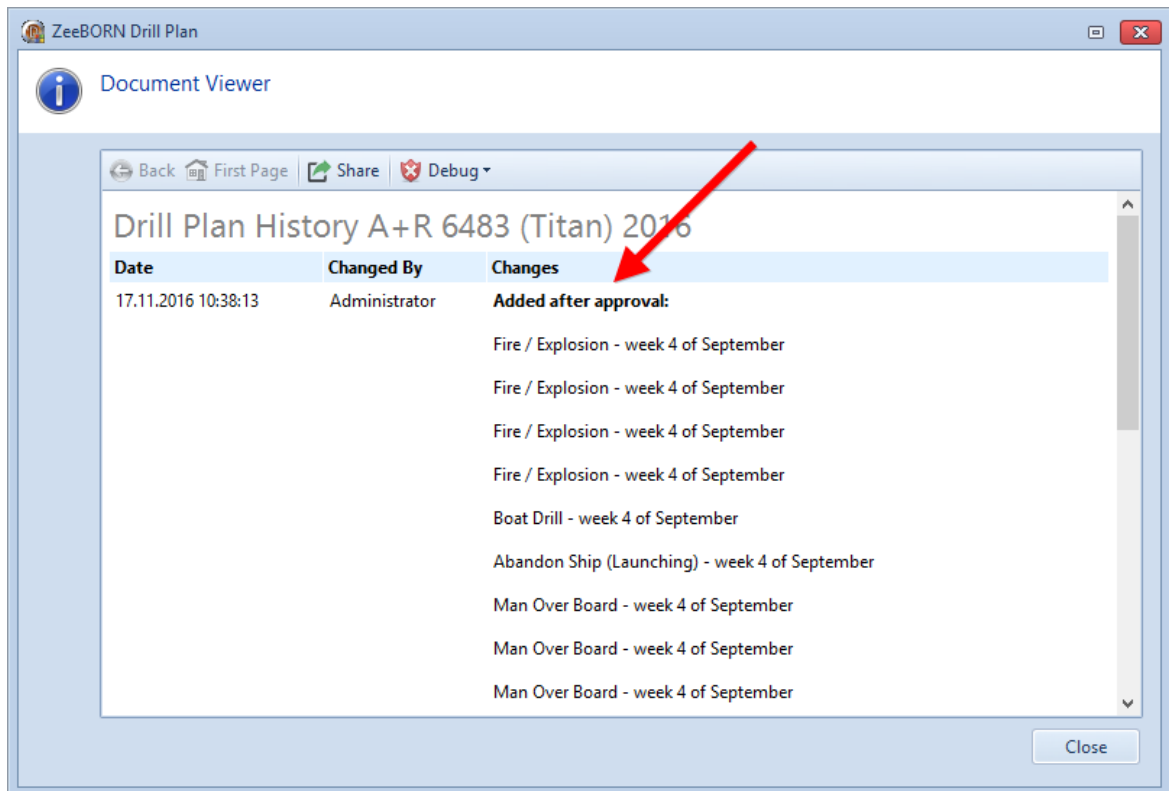
Note: If you delete a drill from the drill plan the box will be marked differently. It may be reproduced at any time in the future that there was a planned drill.



Hit button **Legend** to get an overview about the used icons.



After approving any changes are displayed separately on the history:



The screenshot shows a web application window titled "ZeeBORN Drill Plan". Inside, there is a "Document Viewer" section. At the top of the viewer, there are navigation buttons: "Back", "First Page", "Share", and "Debug". The main content area displays the title "Drill Plan History A+R 6483 (Titan) 2016". Below the title is a table with three columns: "Date", "Changed By", and "Changes". A red arrow points to the "Changes" column header. The table contains one row of data for the date 17.11.2016 10:38:13, changed by Administrator, with the following changes listed:

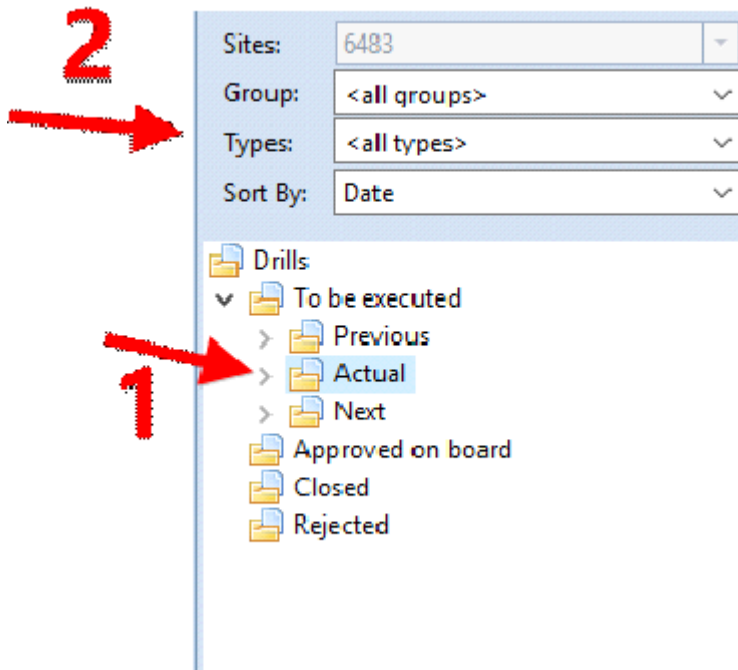
Date	Changed By	Changes
17.11.2016 10:38:13	Administrator	<b>Added after approval:</b> Fire / Explosion - week 4 of September Fire / Explosion - week 4 of September Fire / Explosion - week 4 of September Fire / Explosion - week 4 of September Boat Drill - week 4 of September Abandon Ship (Launching) - week 4 of September Man Over Board - week 4 of September Man Over Board - week 4 of September Man Over Board - week 4 of September

A "Close" button is located at the bottom right of the document viewer.

## Drill Reports

---

### General



After approval of the selected drill plan, drills are displayed in the main overview.

Drills divide in the following folder: previous, actual and next (1). It is depending on due days and selected check days.

The tree can be specified and expanded (2):

- Hit button **Group** to only display the drills which belong to a selected drill group.
- Hit button **Type** to display a specified drill.
- To select the tree and sort by date or group and drill type as well as only drill type hit button **Sort by**.

### **Report Drill**

To report a Drill, select the required drill in the tree and hit **Report planned drill**.

**ZeeBORN Drill Plan**

Save Cancel Show Drill Details

Details Emergency Equipment Condition Attachments

**Drill:**

Execution Date: 17.11.2016 Duration from: to:

**Passenger / Crew Roll Call**

Completed Number Present: 0 Number Absent: 0

Name, Rank and Reason for Absentees:

**Drill Details**

Completed Satisfactorily Deficiencies:

followed by CBT Training Title:

include Demonstration in Use of Safety Equipment Equipment:

Additional Information:

Description of De-briefing:

You should enter the values.

**Note:** If you fill in a number greater than zero in the field **Number absent** - you have to enter a remark in the field **Name, Rank and Reason for Absentees**.

Switch to the next tab and the equipment will be marked which was used for the drills.

Equipment	G	R	D	Remarks
Emergency Fire Pump	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fire Hoses / Nozzles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fire Detectors/ Alarms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Bilge Alarms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Liferafts/ Launch Davits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Review of Safety Meeting Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rescue Boat/ Launch Davit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Lifeboat Engines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hydrostatic Release Units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

The capital letters stand for:

**G** = Good

**R** = Required Attention

**D** = Details attached

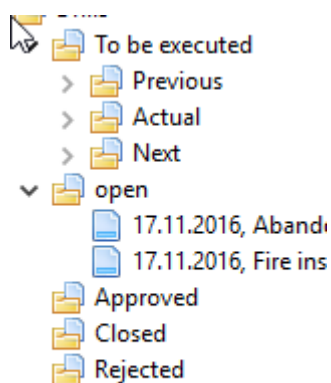
Select Equipment. If a check mark is placed in the box **D** or **R** it is necessary to describe in the selected field **Remarks** (the system checks the entry during the approval process).

The fields **Additional Information** and **Description of de-briefing** are mandatory (the system checks the data during the approval process too).

Switch to the next tab if documents have to be attached.

## Open Reports

A reported drill will be displayed in the tree under the folder **open**.



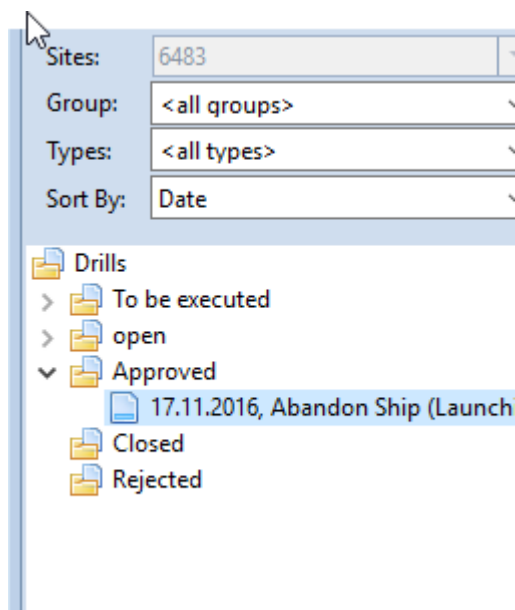


The following buttons are available in the area **Open Reports**:

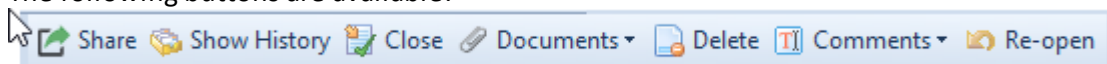
Edit	Edit report.
Share	The HTML view of the report (on the right) can be exported or print
Show History	History of the report will be shown.
Approve (on board)	Approve of report. It is not possible to edit anything. An approval remark is mandatory.
Approve & Close	In case of relevant user right "close a report" so the open report can approve and close just in one step.
Documents	Add, view or delete of attachments.
Delete	Delete report.
Comments	Comments will be edited or displayed.


### Approved Reports

After a report is approved no further changes or entries are possible. The report will be displayed under the folder **approved**.



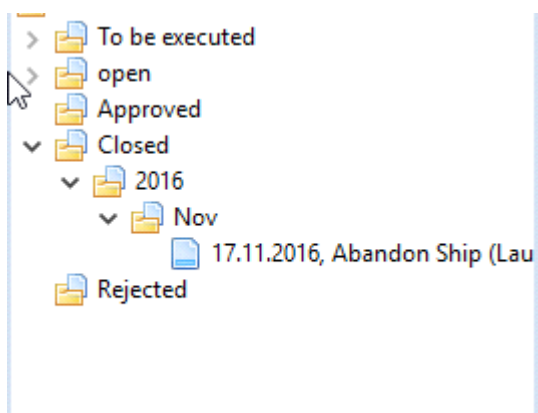
The following buttons are available:



Share	The HTML view of the report (on the right) can be exported or print.
Show History	History of the report will be shown.
Close	The report will be closed finally. A reason will be notified.
Documents	Add, view or delete of attachments.
Delete	Delete of the report. <b>This button is only visible with the relevant rights.</b>
Comments	Comments will be edited or displayed.
Re-open	<p>The report can re-opened for editing again. A reason will be notified and it will be shown in the report after re-open.</p>  <p>Der Report wird wieder im Folder „Open“ angezeigt.</p>







## Closed Reports

After closing a report you will find it in folder **Closed**. The area **Closed** will be sorted by year and month.



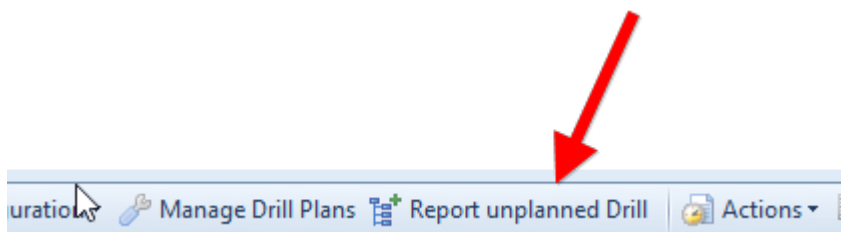
**Note:** For reasons of performance the Closing area will be not updated. It could be that a closed report will not be shown after closing in this area. After refreshing the report will be visible.

The following buttons are available in the area **Closed**:

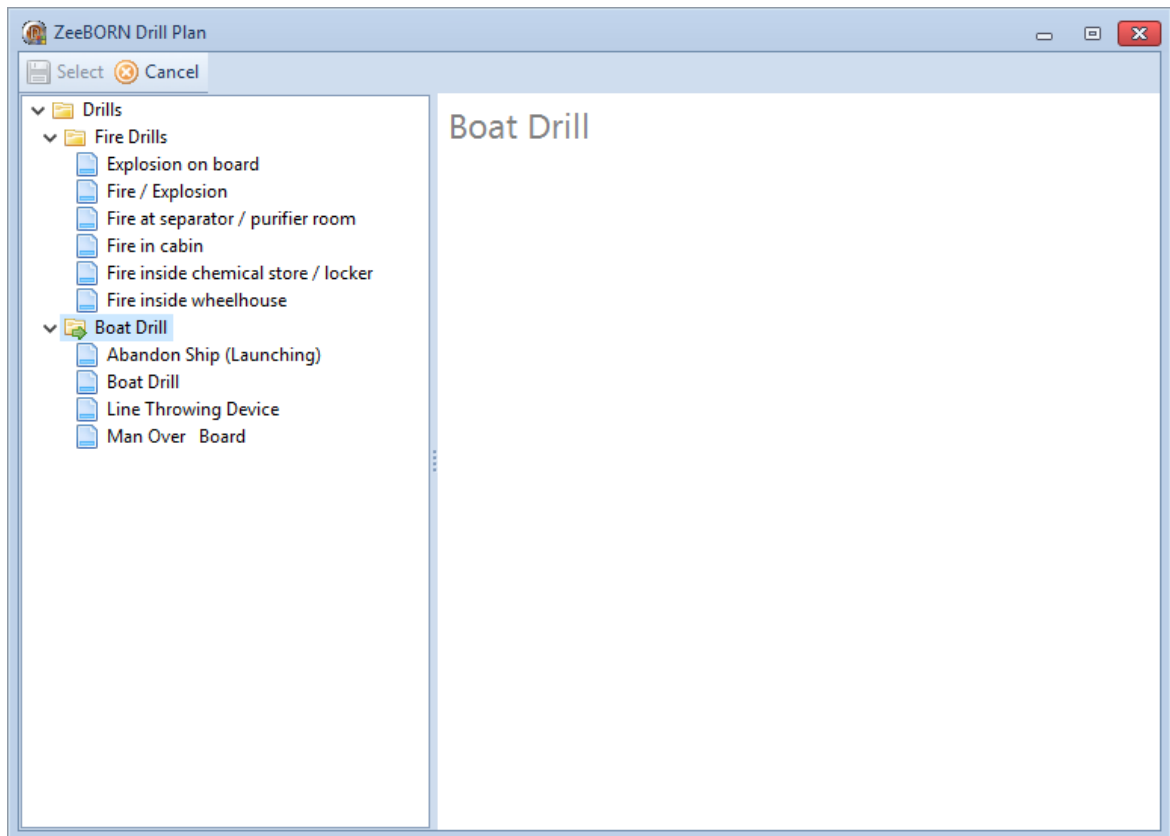
 Share  Show History  Show Documents  Delete  Comments  Re-open	
Share	The HTML view of the report (on the right) can be exported or print.
Show History	History of the report will be shown
Show Documents	Existed attachments will be shown..
Delete	Delete report <b>This button is only visible with the relevant rights.</b>
Comments	Comments will be edit or displayed.
Re-open	<p>The report can re-open for editing again. A reason will be notified and it will be shown in the report after re-open.</p> <p>Execution:</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p><b>Report Details</b></p> <p>Additional: <b>reopened</b></p> <p>Reopen Reason: <b>reopen reason</b></p> <p>Execution Date: 17.11.2016</p> <p>Duration: 05:00:00 to 09:00:00</p> </div> <p>Der Report wird wieder im Folder „Open“ angezeigt.</p>

### Report unplanned Drill

For reporting an unplanned drill hit button **Report unplanned Drill**.

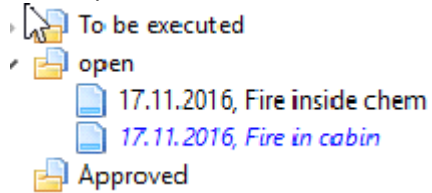


Next overview is to select the preferred drill:



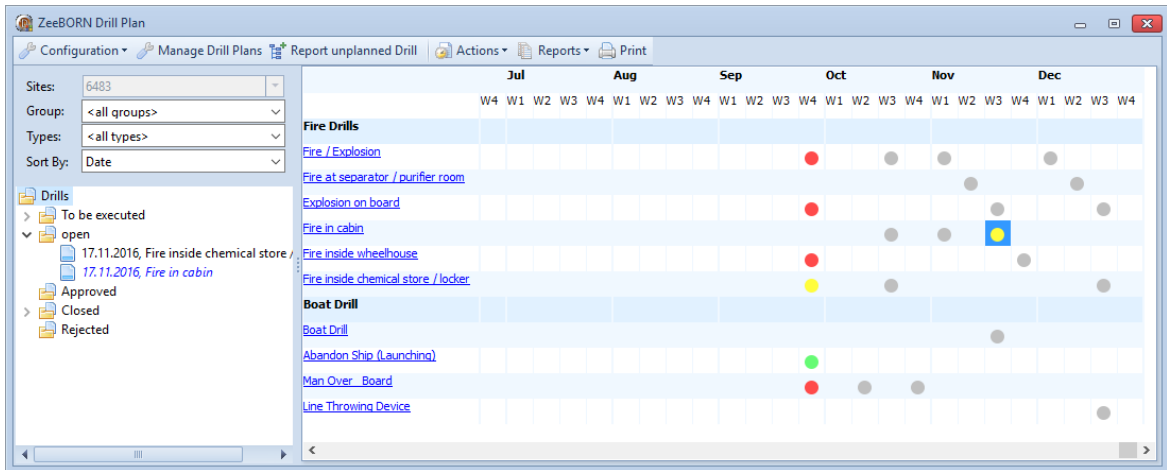
The reporting process is the same as for planned drills.

The unplanned drills listed in the tree are shown in blue and italic letter:

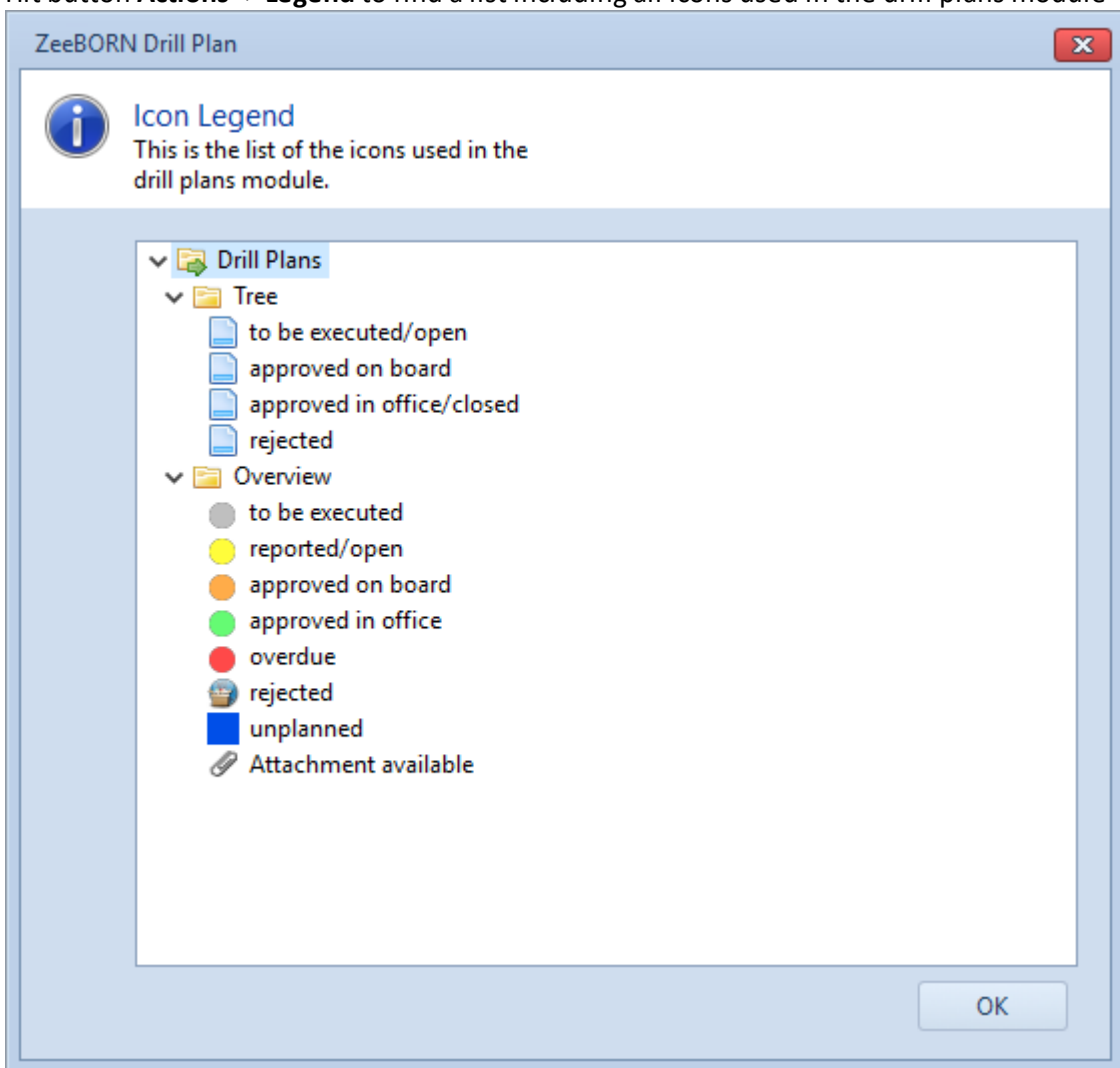


### Drill Overview

Hit button **Drills** and you can navigate directly in the tree and the drill plan will be displayed for the actual year.



Hit button **Actions** -> **Legend** to find a list including all icons used in the drill plans module



Select a ball (icon) in overview for:

- Report or Edit of a drill -> on the condition the status is: **to be executed** or **open**
- or display the drill report -> on the condition the status is: **approved** or **closed**

## Reports

---

### Difference between Planned and Execution Date

---

The report shows the difference between planned and actual execution date.

### Overview per Year

Here you will find an overview including all existed drills – over the last years is possible. But drills cannot be edit or change here.

## 24.1.2 Agency Requests

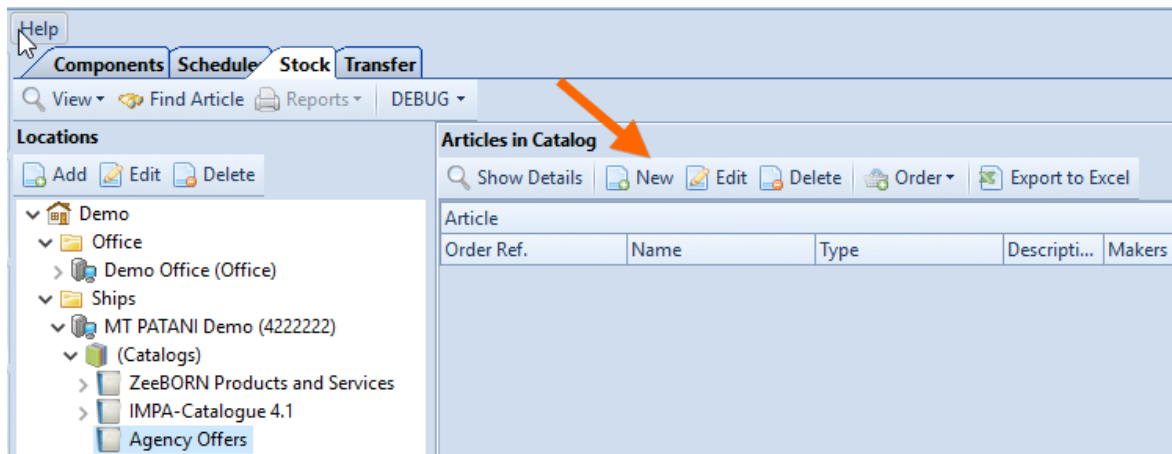
### Preparation

Agency Requests can contain either Free Line Items or Catalog Items. To manage Catalog Items, you have to access the Maintenance module. Switch to the TAB “Stock” and then select the required catalog.

**Note:** Catalogs will be administered globally, this means that each ship and office has the same catalog. You only have to adjust the settings once.

A new catalog is created when you select the folder “Catalog” in the tree. Click the button “Add” with the right-hand mouse button.

To create a new Catalog-Item you have to choose the required catalog and hit the button “New” located on the right side.



Now you can edit name and possible description. It is also possible to edit a Cost Account here. When selecting of an item the created cost account is included in the request.

### Create an Agency Request

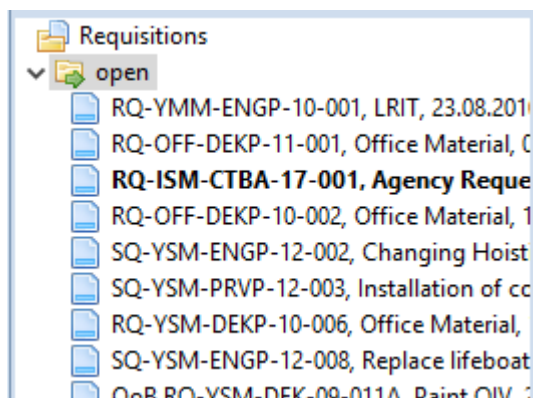
To create an Agency Request open the Purchase Module by clicking the button „New Agency Request“.

This button is only available in the office version and it is necessary to have the relevant user right to use the button.

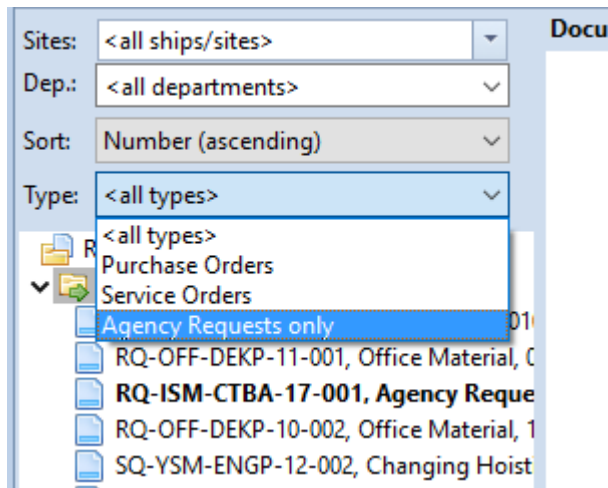
When a new Agency Request will be created, the system makes the following standard settings:

- the check box „for all items“ related to a common Cost Account is not activated (i.e. each item uses a separate cost account) and disabled
- the field „Supplier Address“ has been renamed to „Agency Address“
- just you can select between the following items: “Free line items” or “Catalog Items”

After editing the Agency Request will be marked in bold in the tree:




Select „Type“ in the check box and only Agency Requests will be displayed in the tree:



In the request document view is also a note that there is an Agency Request:

...



**Requisition (Agency Request) RQ-ISM-CTBA-17-001**  
**Agency Request**  
**Ice Breaker Santa Maria - 1234568**  
**Expected Delivery Date:**

Booking Date:

### 24.1.3 Exchange Rate Updater

The Exchange Rate Updater collects and stores the current exchange rates from the website: Only the exchange rates of the currencies, which are marked as "Active" in the system, are stored.

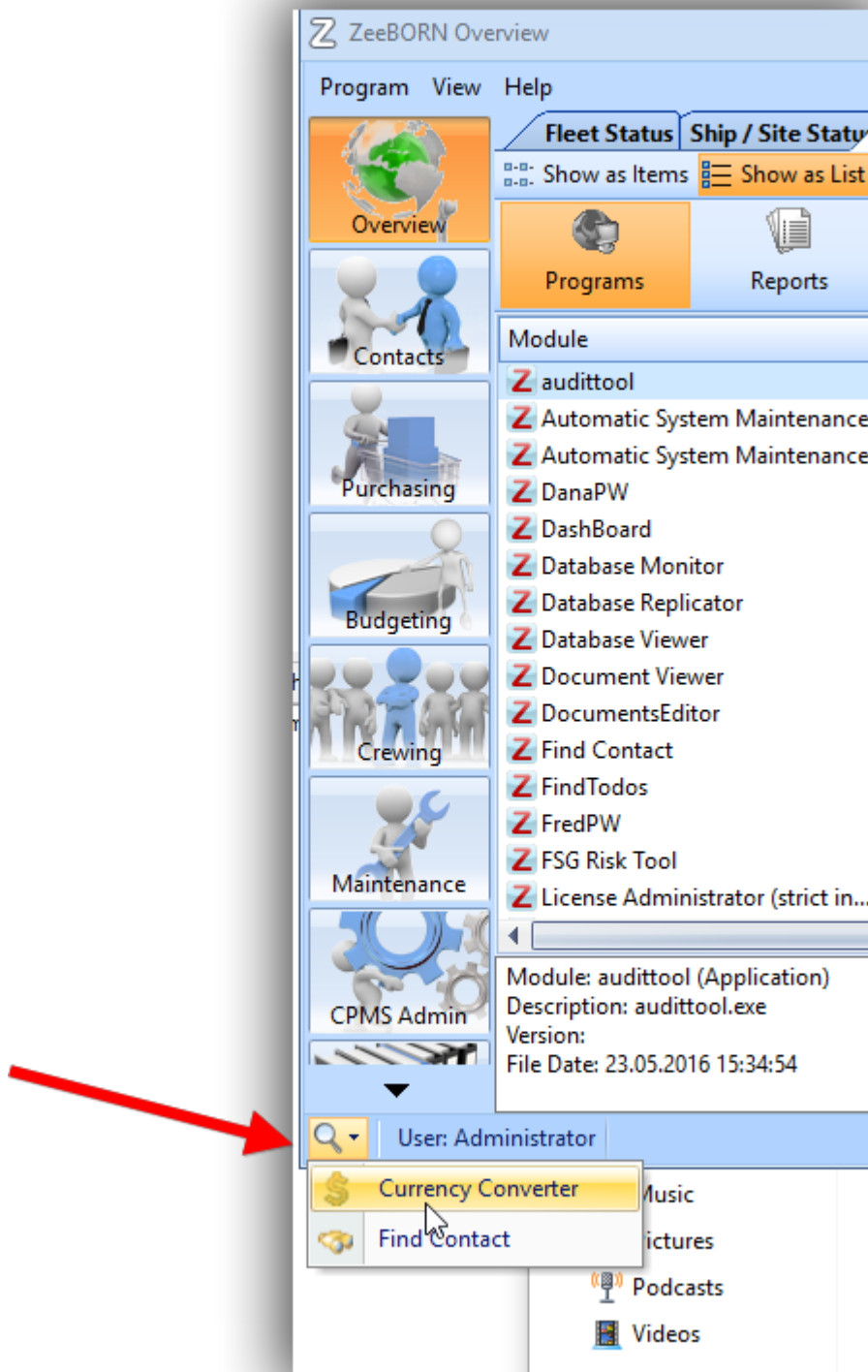
#### **Start Exchange Rate Updater**

There are two options to start the Exchange Rate Updater:

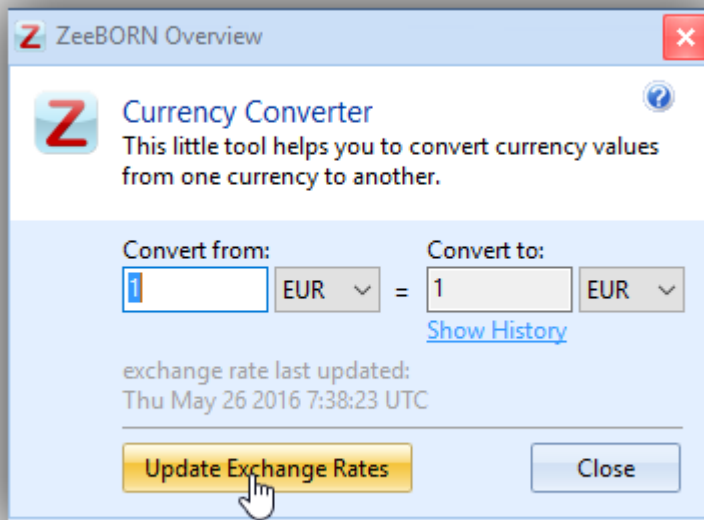


**1) Currency Converter**

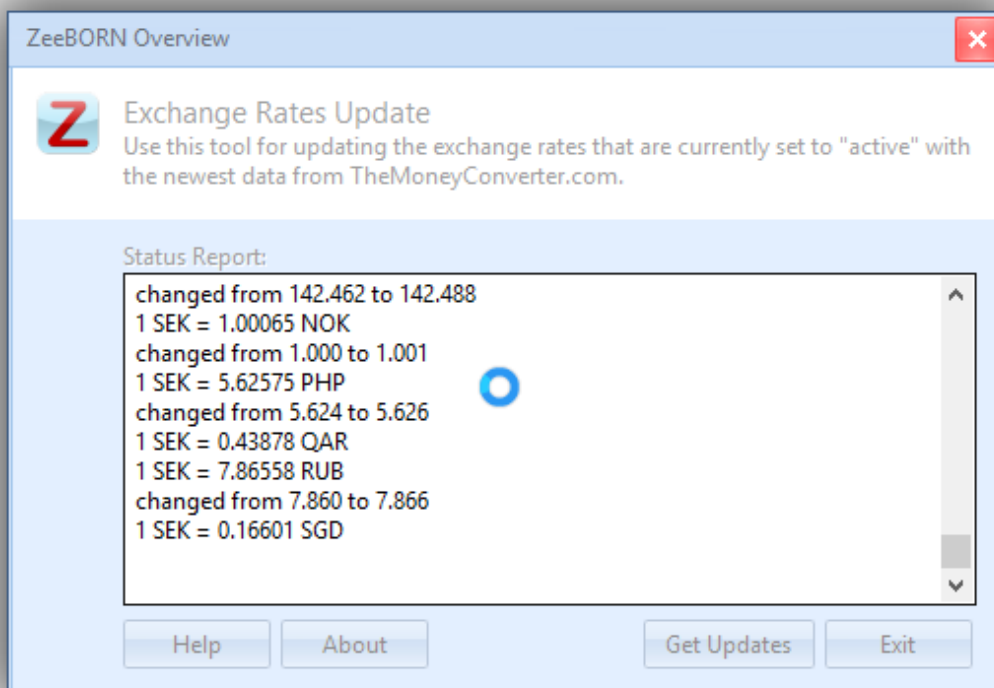
The currency converter can be found in the lower part of the ZeeBORN system.



Here there is the button "Update Exchange Rates". It is necessary to have the relevant user right to use this button.



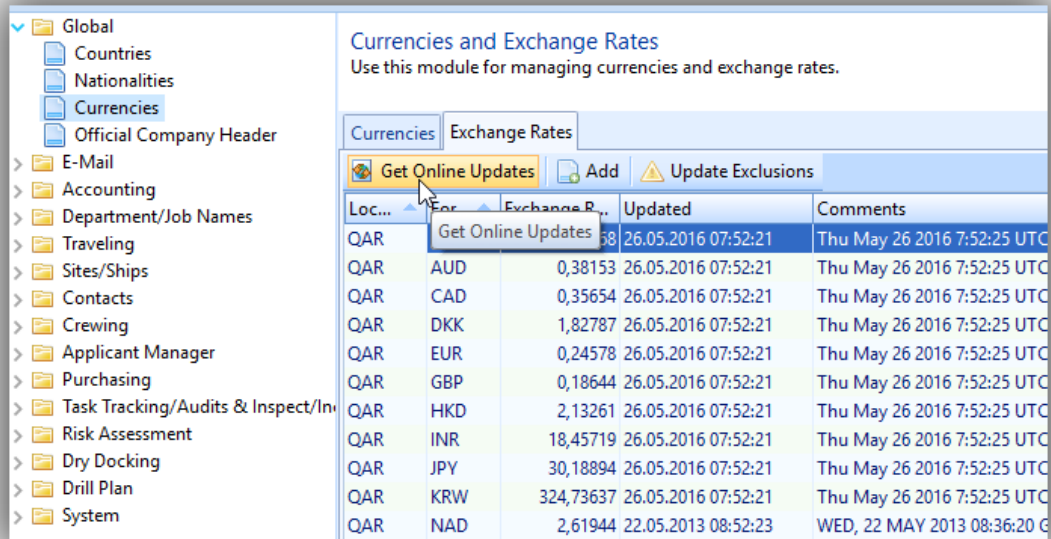
By clicking on the button will update the exchange rates. The previous exchange rates are written into the history and remain in the system, so that the exchange rate, which is valid at any given time, can always be determined.



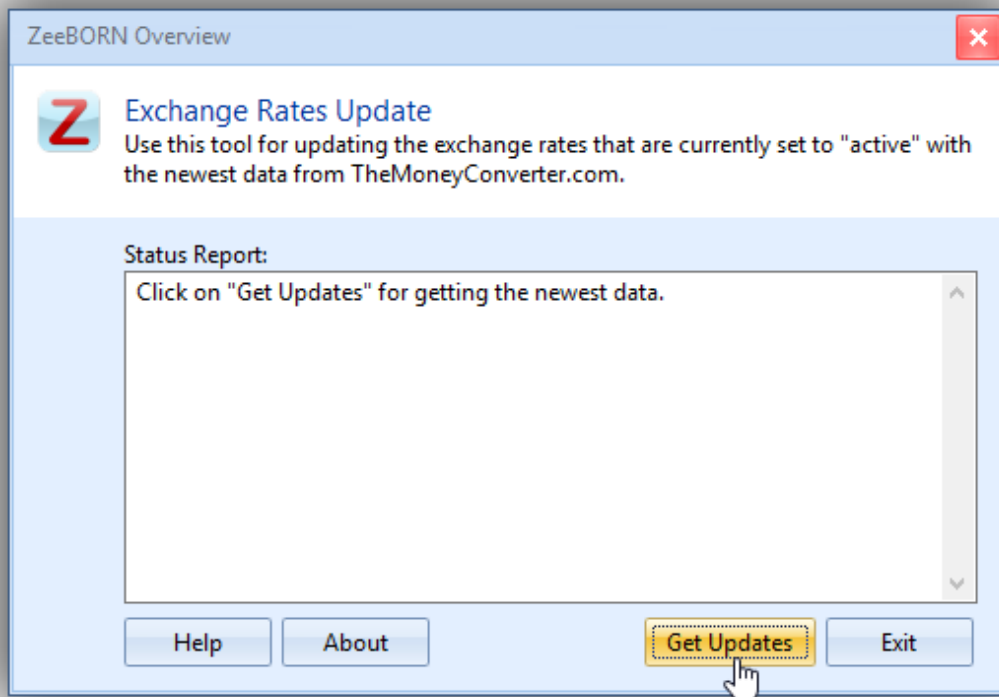
## 2) Configuration

If you have the appropriate user right, you can also start the update via the configuration.

To do this, select **Global-> Currencies** and switch to the TAB „Exchange Rates“.



There you can find the "Get Online Updates" button.

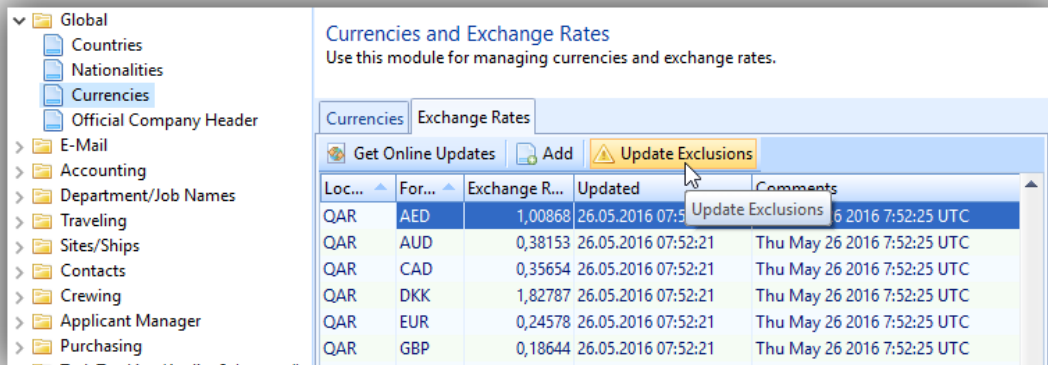


Click on the "Get Updates" button to start the update process.

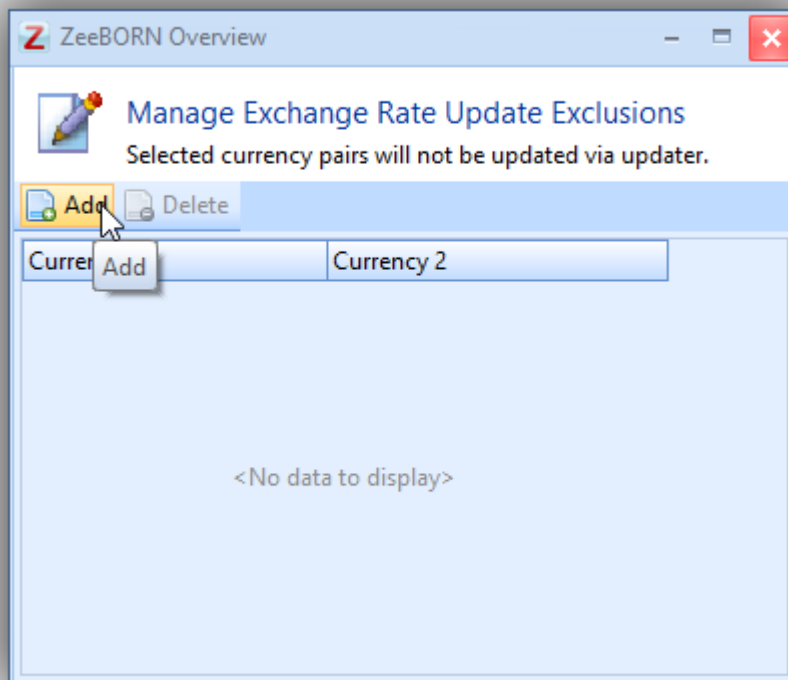
### **Exceptions**

It may be necessary to exclude certain currency pairings from the update routine (for example, if a fixed exchange rate has been agreed with the bank).

To do this, you have to customize in the system which pairings should not be updated.



After clicking on the button "Update Exclusions" the form opens:



The exceptions can be managed here.

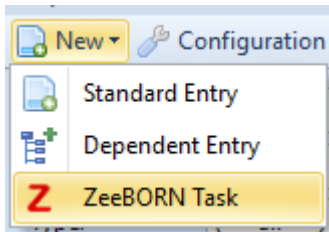
#### 24.1.4 ZeeBORN Tasks (eng)

The ZeeBORN Tasks feature can be used for submitting errors and change requests to ZeeBORN support. The related requests can be created within the ZeeBORN software and the follow-up can be tracked here as well.

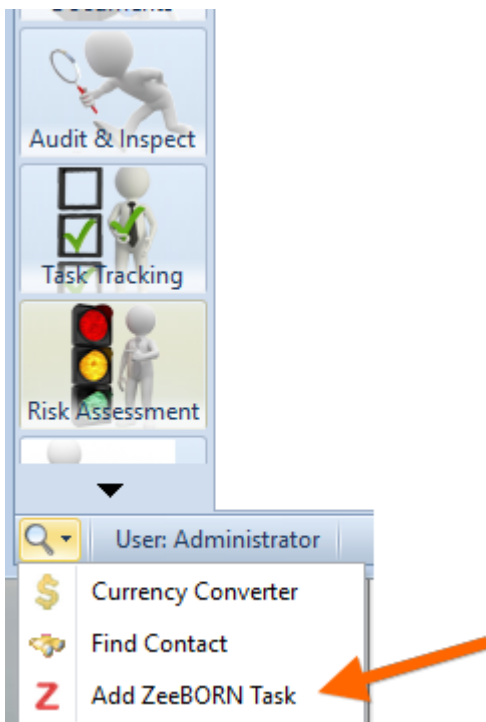
Please note: You need an active license for the ZeeBORN Task Tracking module if you want to use this feature.

### Add new Task

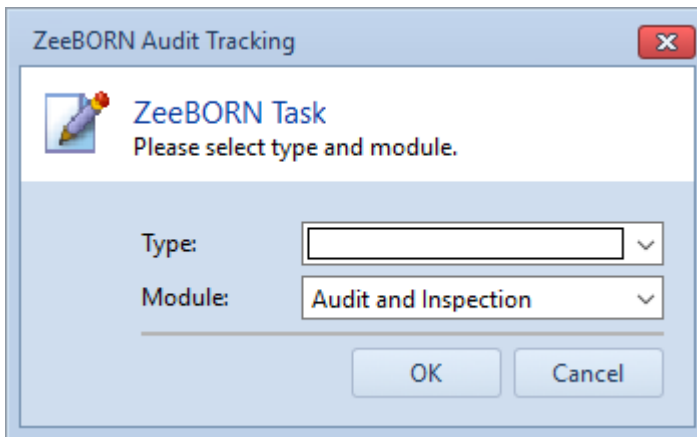
A ZeeBORN Task can be created either directly in the Task Tracker via **New** -> **ZeeBORN Task**



or can be created at any time via the button in the lower left corner of the ZeeBORN window's status bar.

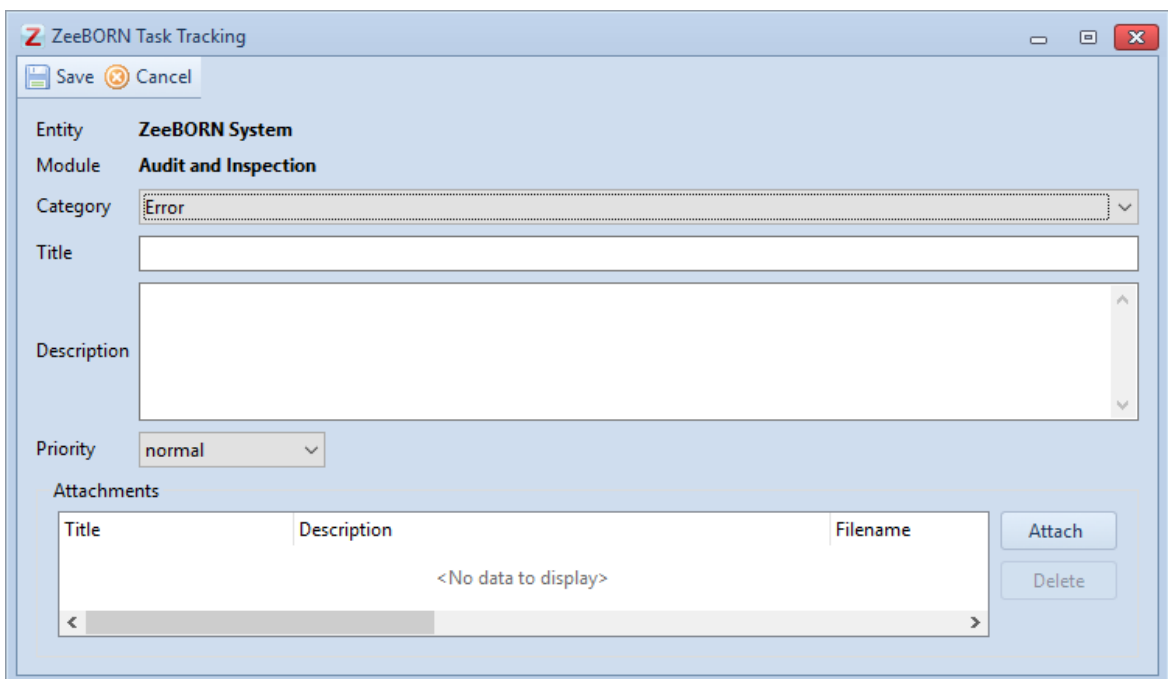


If the button was clicked, then you have to decide, which type the task should have (Error, Change Request) and - in case the task is opened directly from the module Task Tracker out - which module it concerns (the task was started from the help area, the currently open module is already preselected).



The image shows a dialog box titled "ZeeBORN Audit Tracking". It contains a pencil icon and the text "ZeeBORN Task Please select type and module." Below this, there are two dropdown menus: "Type:" and "Module:". The "Module:" dropdown is currently set to "Audit and Inspection". At the bottom of the dialog are "OK" and "Cancel" buttons.

In the following form, title and description can be recorded as well as assigned a priority.

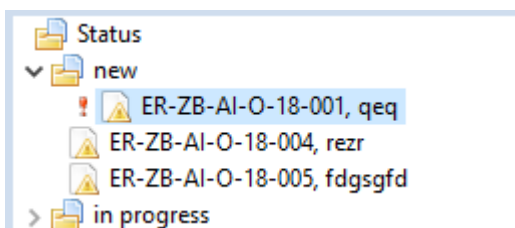


The image shows a "ZeeBORN Task Tracking" form. It has a "Save" button and a "Cancel" button at the top. The form fields are: "Entity" (ZeeBORN System), "Module" (Audit and Inspection), "Category" (Error), "Title" (empty text box), "Description" (empty text area), and "Priority" (normal). Below these fields is an "Attachments" section with a table with columns "Title", "Description", and "Filename". The table is currently empty, showing "<No data to display>". There are "Attach" and "Delete" buttons to the right of the table.

Necessary attachments can be recorded (among other things also from the Clipboard - screenshots can easily be added as jpg).

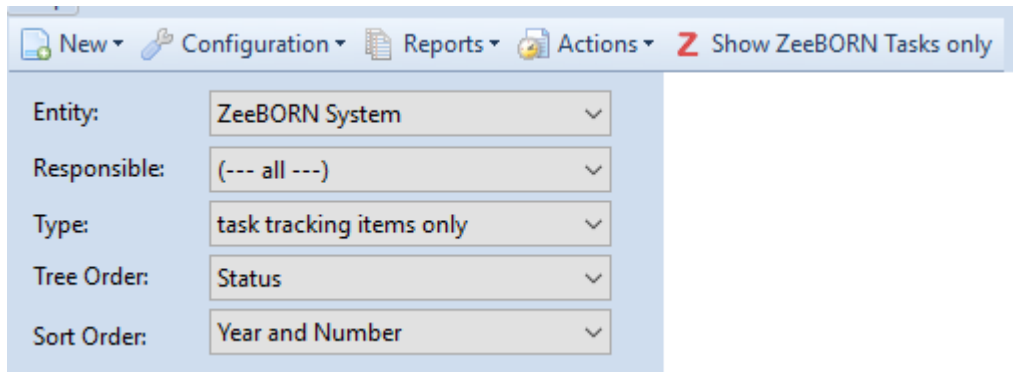
The recorded tasks are available with the status "new" in the module Task Tracking.

In the TAN, the abbreviation ZB makes it easy to identify that this is a ZeeBORN task: ER-ZB-AI-O-18-001



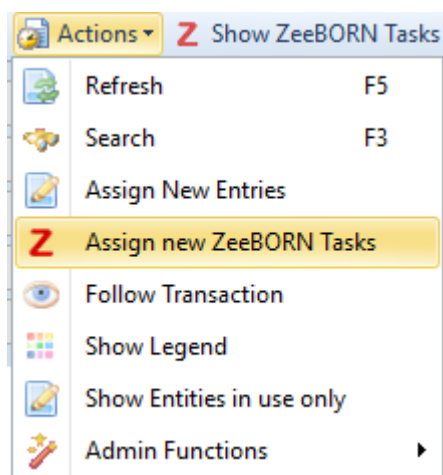
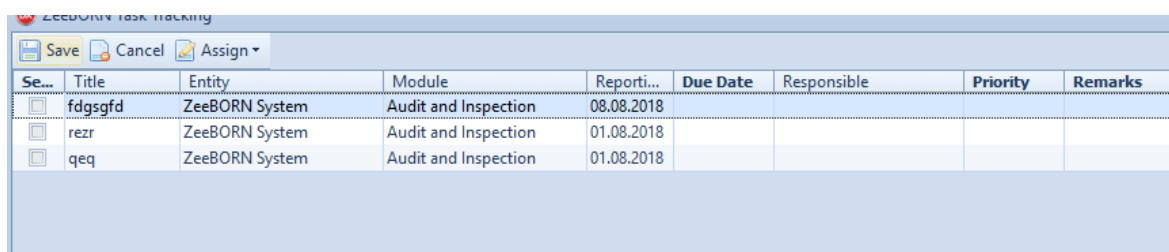


All tasks from the ZeeBORN system are displayed in the module Task Tracking (also from the modules A & I, Incidents etc.). There is a button that the settings can be made with just one click so that only ZeeBORN Tasks are displayed:



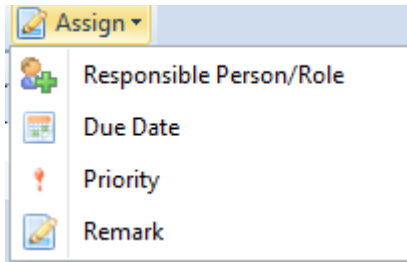
The necessary settings for Entity, Type and Sort Order will be done.

This will only display tasks created for ZeeBORN. However, it has not yet been decided if these are really ZeeBORN Tasks. This happens in the next step. Someone, who is responsible in the company for determining whether a task should really be redirected to ZeeBORN Support will do it via **Actions -> Assign new ZeeBORN Tasks**:

Se...	Title	Entity	Module	Reporti...	Due Date	Responsible	Priority	Remarks
<input type="checkbox"/>	fdgsgfd	ZeeBORN System	Audit and Inspection	08.08.2018				
<input type="checkbox"/>	rezr	ZeeBORN System	Audit and Inspection	01.08.2018				
<input type="checkbox"/>	qeq	ZeeBORN System	Audit and Inspection	01.08.2018				

By clicking **Assign**, you can be used to assign a Responsible Person/Role, a Due Date, another Priority and a Remark to previously selected tasks.



If you want that the task is forwarded to ZeeBORN Support, as Responsible Person "ZeeBORN Task support" must be assigned.

Then the tasks get the status "In Progress".

It can also be assigned to an individual task who is the Responsible Person etc. To do this, click on the "Follow Up" button in the task and assign the corresponding values:

A screenshot of the 'ZeeBORN Task Tracking' dialog box. The title bar shows 'ZeeBORN Task Tracking' and a close button. Below the title bar are 'Save' and 'Cancel' buttons. The main area displays the task ID 'ER-ZB-AI-O-18-001'. There are two columns: 'Current Value:' and 'New Value:'. Under 'Responsible', there are radio buttons for 'Person:' and 'Role:'. The 'Person:' radio button is selected, and the 'New Value:' dropdown is set to 'ZeeBORN Support'. There are 'Clean' buttons next to the dropdowns. The 'Role:' radio button is unselected, and its 'New Value:' dropdown is empty. Below this, there are fields for 'Status:' (new), 'Due Date:' (<not assigned>), 'Priority:' (high), and 'Follow Up Date:' (14.08.2018). At the bottom, there is a 'Comments:' label and a large empty text area.

It will be displayed graphically that a task was assigned to ZeeBORN:

ZeeBORN Task	not sent to ZeeBORN
Number:	ER-ZB-AI-O-18-005
Status:	in progress
Category:	Error
Entity:	ZeeBORN System

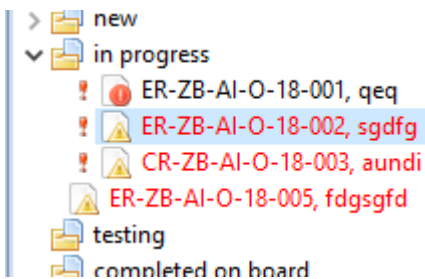
Then the tool filters out the tasks assigned to ZeeBORN and transferred to our database. After the transfer, the presentation looks like as follows:

ZeeBORN Task	Sent to ZeeBORN: 14.08.2018
Number:	ER-ZB-AI-O-18-005
Status:	in progress

### Handling of Tasks, which should not be sent to ZeeBORN

If a task is not to be sent to ZeeBORN, but processed in-house, then you can proceed as described above and enter the appropriate Responsible Person.

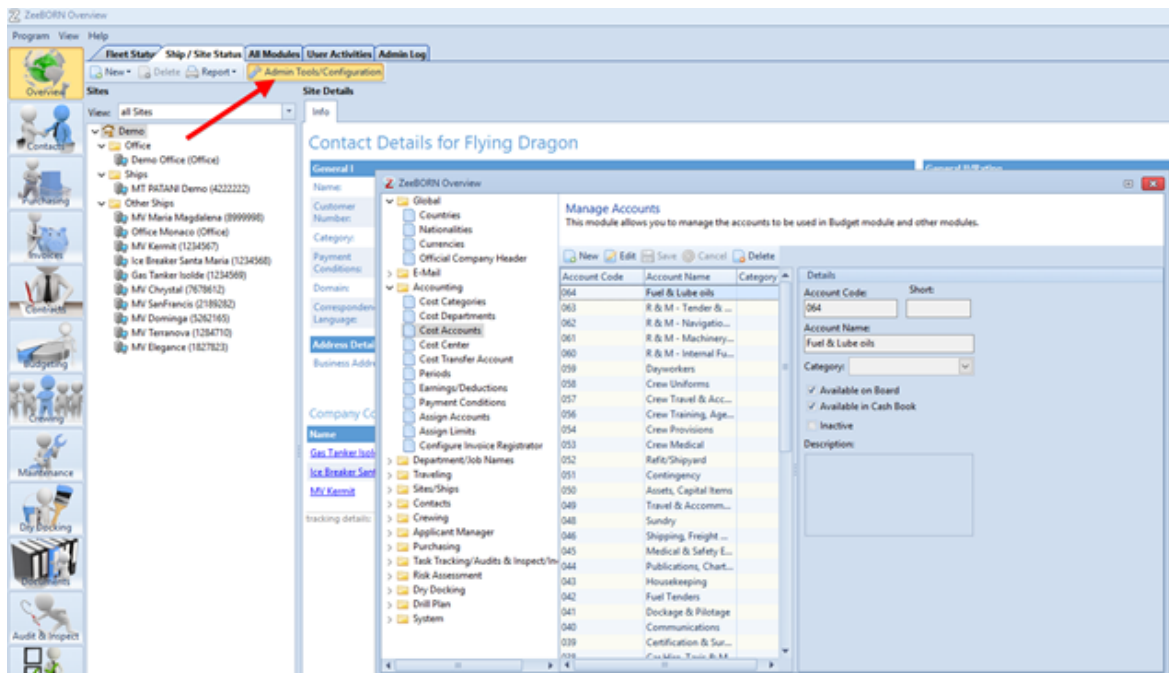
In order to distinguish whether the tasks are processed in-house or by ZeeBORN, the tasks assigned to ZeeBORN are displayed in red:



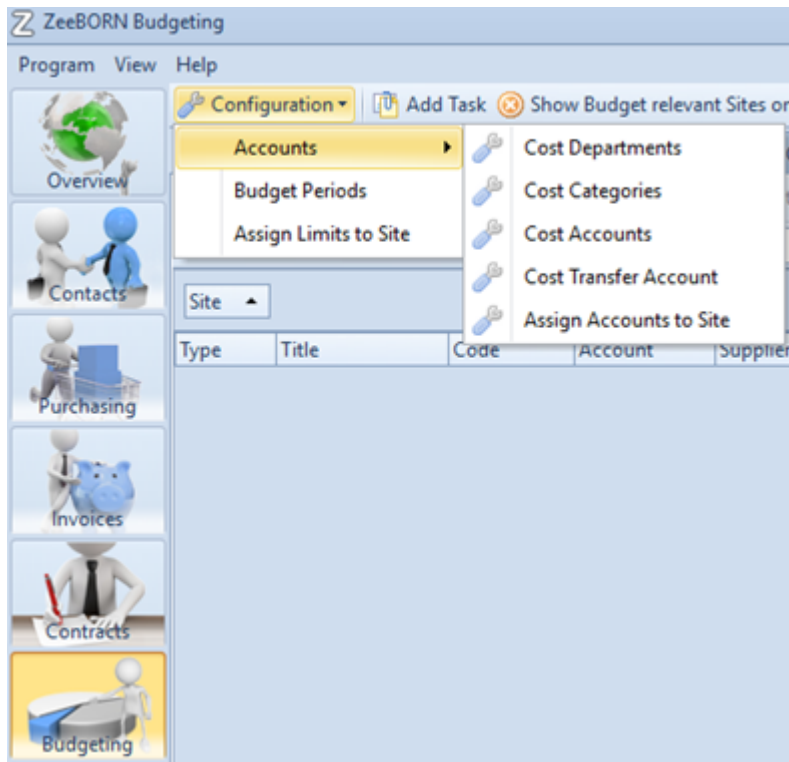
If a task is to be rejected, it is assigned the status "Rejected" via Follow Up. The task will then be displayed in the folder "Rejected" (if necessary, it can be put into an editable status per "Reopen").

### 24.1.5 How to change accounts

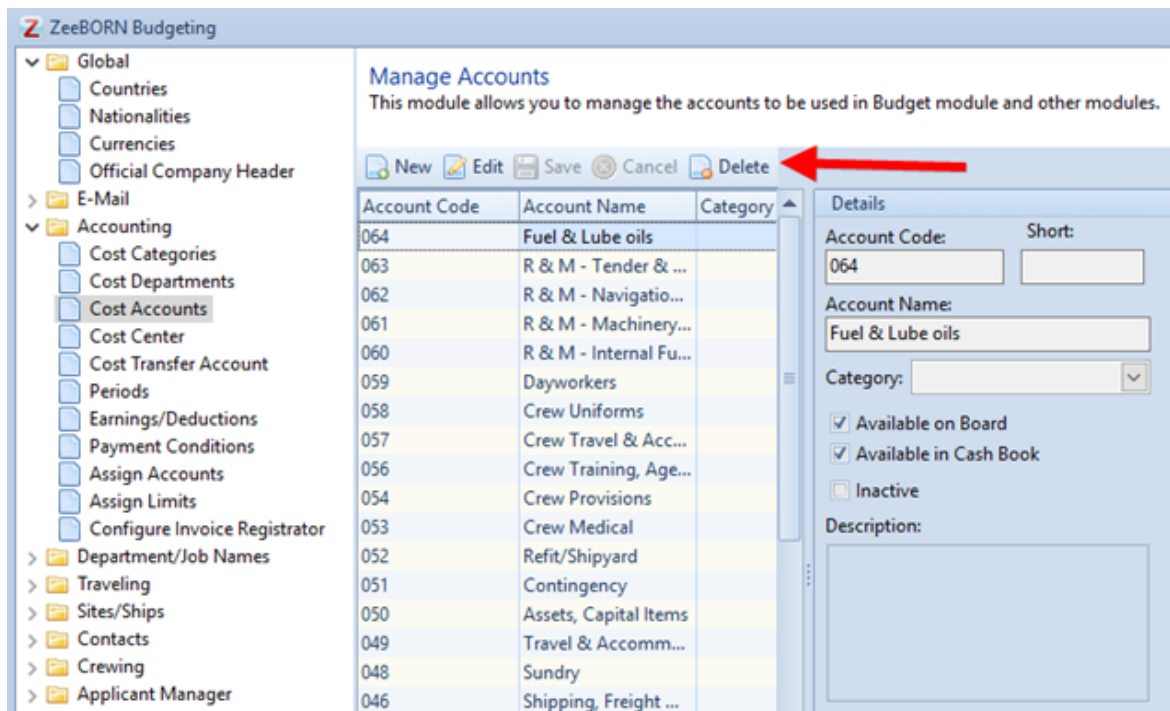
To change the accounts for all vessels you have to go to "Admin Tools/Configuration" in the section "Overview". There you will find "Cost Accounts" in the section "Accounting".



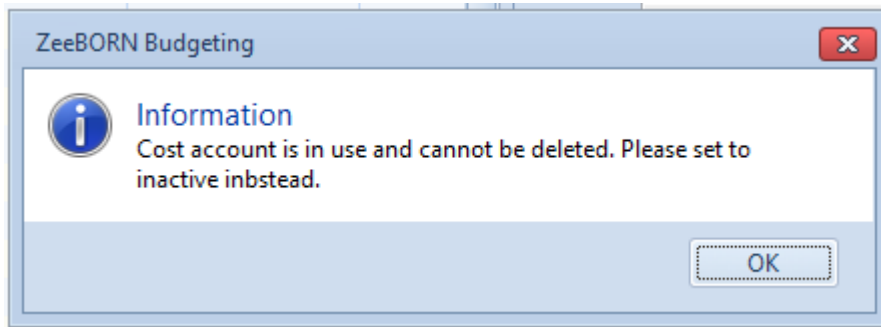
Or you can go to "Configuration" in the module "Budgeting" and there you will find in "Accounts" also the item "Cost Accounts".



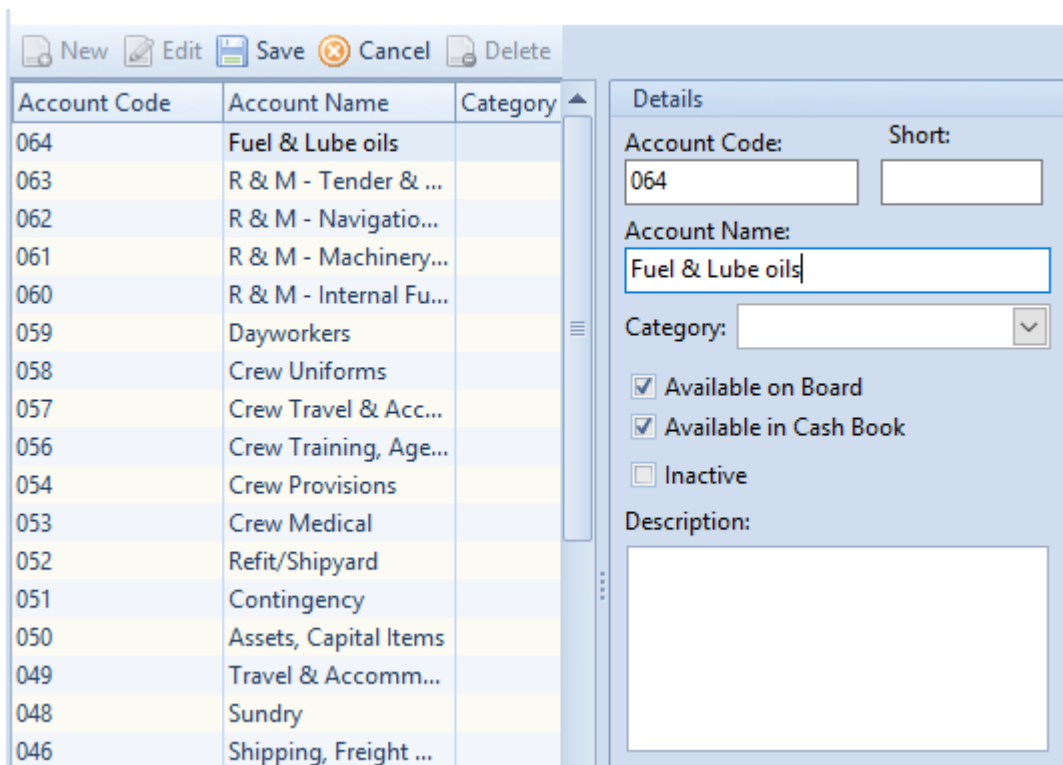
If you have the user right, you can delete all unnecessary accounts by clicking "Delete".



If the account is already in use, the following information will be displayed.

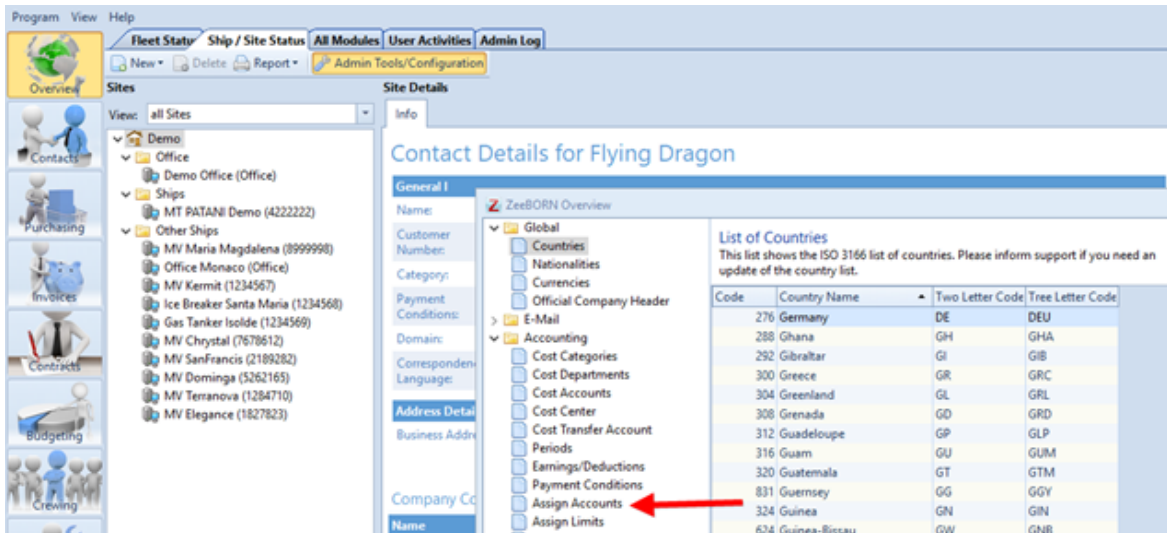


Then the account must be disabled with "Edit" and select the check box "Inactive". Click the button "Save" to save the operation.

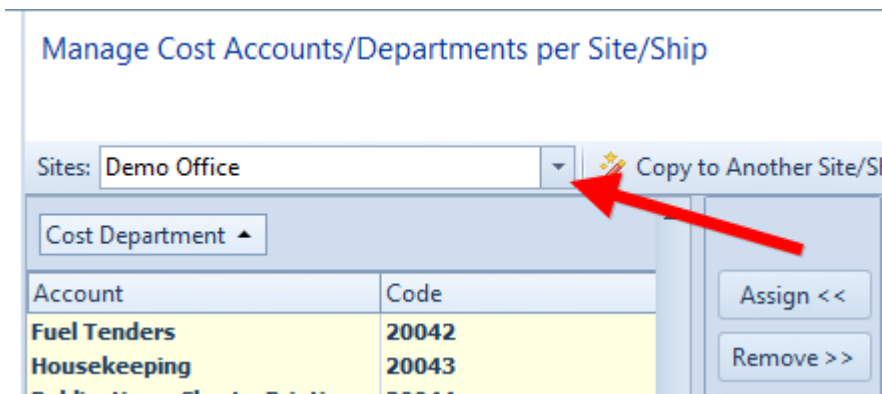


In the "Edit" section, you can also change the name, the account code and the description.

To remove accounts for one ship, please choose „Assign Accounts“.



Now select the needed vessel.



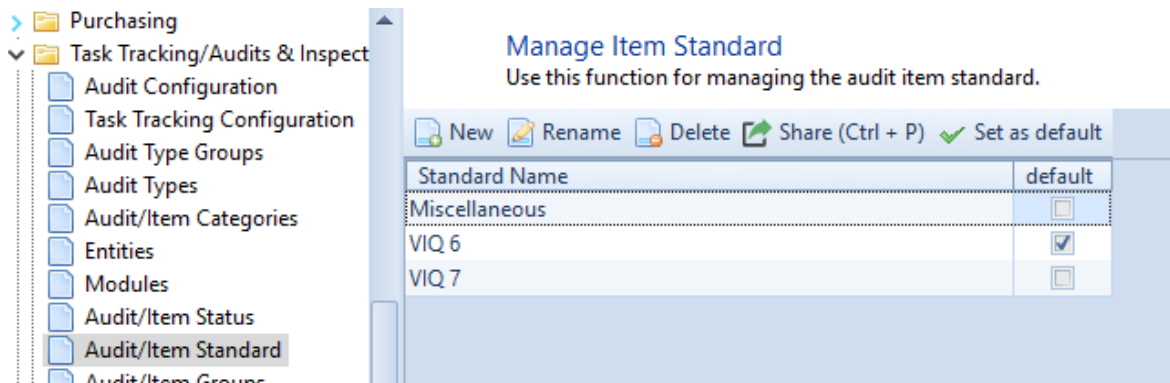
Open the Cost Department and choose the account. With "Remove" the account will be switch off the list, if account wasn't in use or will be displayed in grey letter, if the account already was in use.

## 24.1.6 VIQ Standards (eng)

It is now possible to manage VIQ standards for grouping of item groups/numbers.

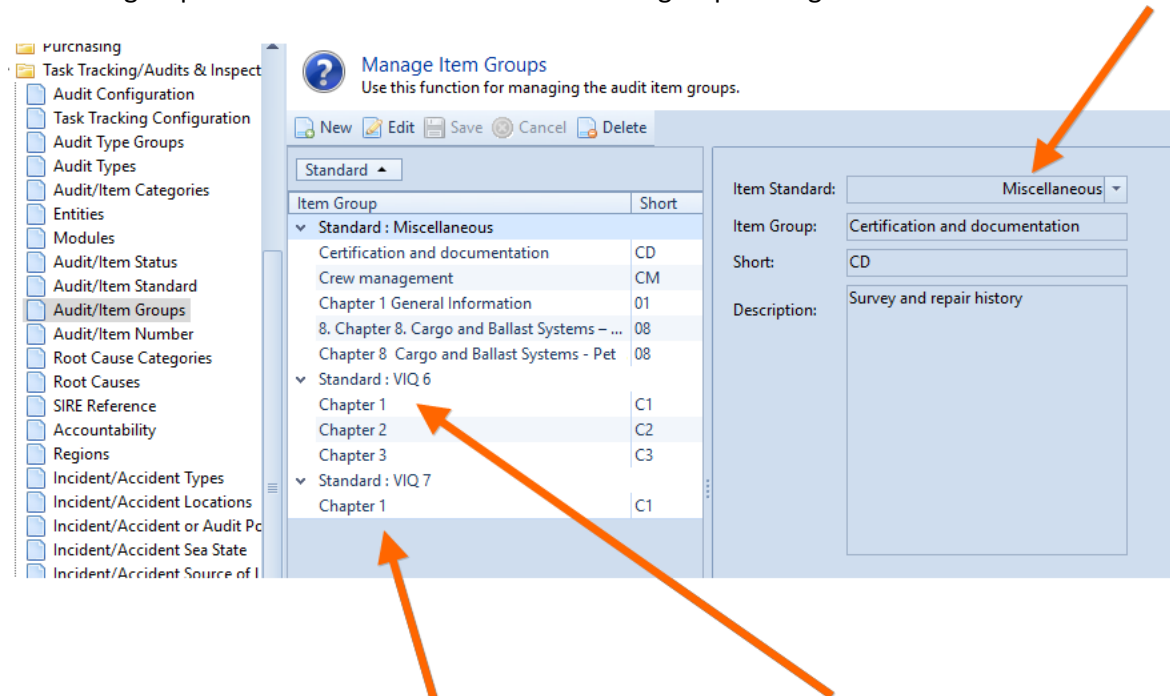
### Configuration

To do this, the standards must be managed in the configuration.



The current standard is set to default and is therefore always pre-selected.

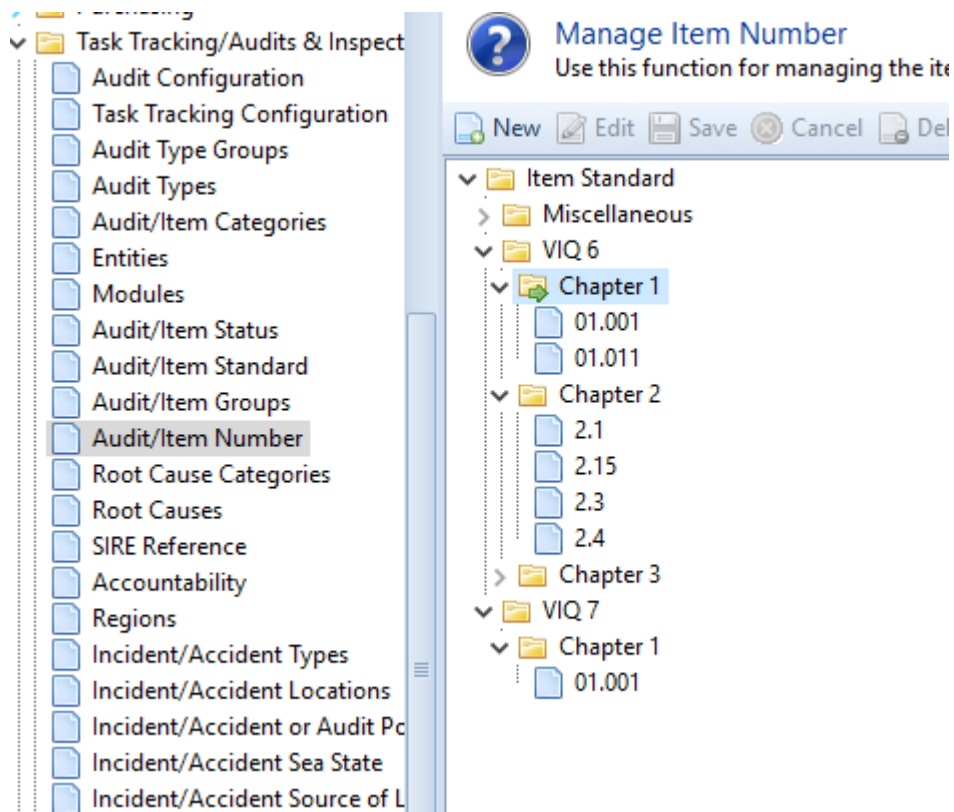
The item groups have now to be defined which item group belongs to which standard.



There can be item groups with the same name per standard.

The view of the item numbers has also be extended to the standard.





### Audit Types

In the Audit Types it is necessary to define which item groups are valid for the type. Here, the groups per standard have now to be chosen:

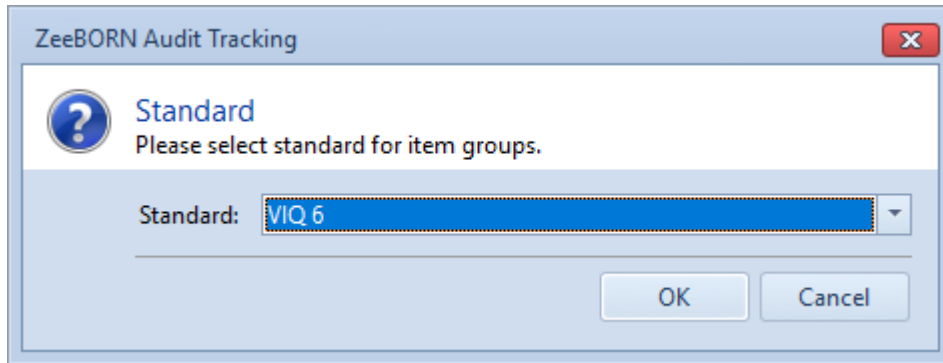
The screenshot shows the 'Details' panel for an 'External Audit'. The 'Name' field is 'External Audit', the 'Group' is 'External Audits', and the 'Short' name is 'EA'. The 'Days till next inspection' is set to 900, 'Days before (Time Frame)' is 0, and 'Days after (Time Frame)' is 0. There are checkboxes for 'exclude from next audit planning' (unchecked), 'show item numbers (if item groups are assigned)' (checked), 'mandat' (checked), 'set as inactive' (unchecked), and 'show regions' (unchecked). Below these are tabs for 'Item Categories', 'Item Groups', and 'Sites for Distributing'. The 'Item Groups' tab is active, showing a table with columns 'Select', 'Item Group', and 'Description'. The table lists 'Standard : VIQ 6' with three checked items: 'Chapter 1', 'Chapter 2', and 'Chapter 3'. Below that, 'Standard : VIQ 7' has one checked item: 'Chapter 1'.

### Create a new Audit

If a new audit is selected, it is necessary to determine which standard to use.

The dialog box 'ZeeBORN Audit Tracking' has a title bar with a close button. It contains a question mark icon and the text 'Select Site and Inspection Type' and 'Use this tool for selecting site and inspection type.' Below this are three dropdown menus: 'Site:', 'Type:', and 'Standard:'. The 'Standard:' dropdown is currently set to 'VIQ 6'. At the bottom are 'OK' and 'Cancel' buttons.

The standard is also be queried when importing a SIRE:



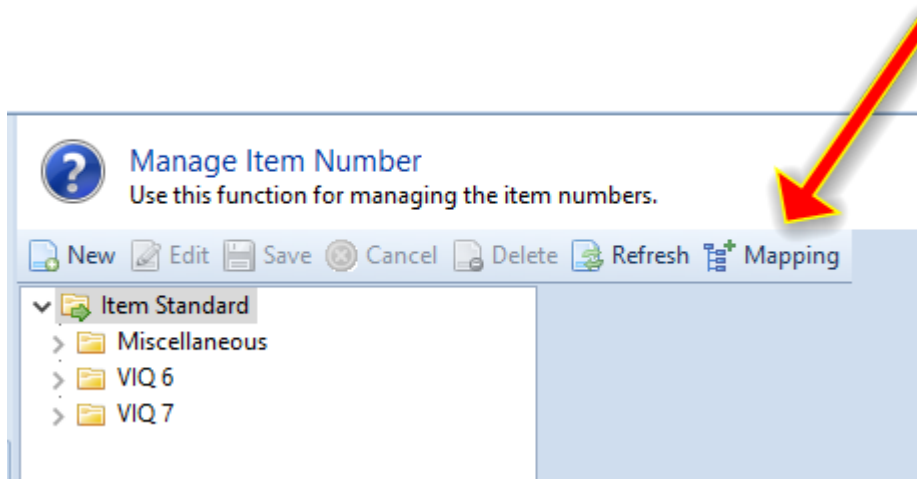
Only item groups which are assigned to the type and standard are available to choose from.

The used standard will then be displayed in the audit and the items:

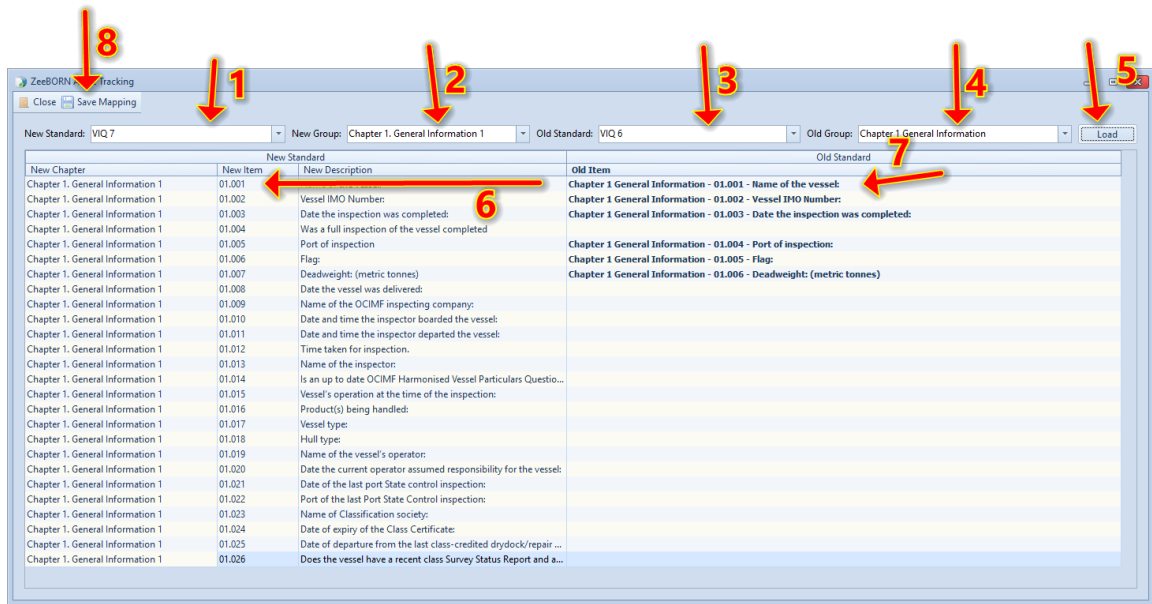
General Data					
Port/Location:	rtzrt				
Inspection Date:	14.08.2018				
Standard:	VIQ 7				
Deficiencies					
Distribute	Due Date	Status	Responsible	Type	Numl
	13.09.2018	new		ToDo	<a href="#">TD-G</a>

### Linking the Item Numbers between the Standards

The item numbers have partially shifted a lot. Therefore, for statistics and evaluations it is necessary (if desired) to link the individual item numbers with their old counterpart from the old standard.



To do this, select the "Manage Item Number" area in the configuration and click on the button Mapping there.



Here then:

1. Select the new standard
2. Select the group to be processed from the new standard
3. Select the old standard
4. Select the group from the old standard from which you want to link the item numbers
5. Loading of a new item number
6. Assign an old item number
7. Finally save all. Then proceed with the next group.

### Report Item Numbers

The report "Item Numbers" checks whether there are links in the specified period. Here the item numbers are added.

In the chart, the item numbers, which are linked, are then displayed among themselves (the second in italic) – the respective standard is set at the front.

ZeeBORN Audit Tracking

Share Close

**TOP 10 most frequent deficiencies**

**Report Details**

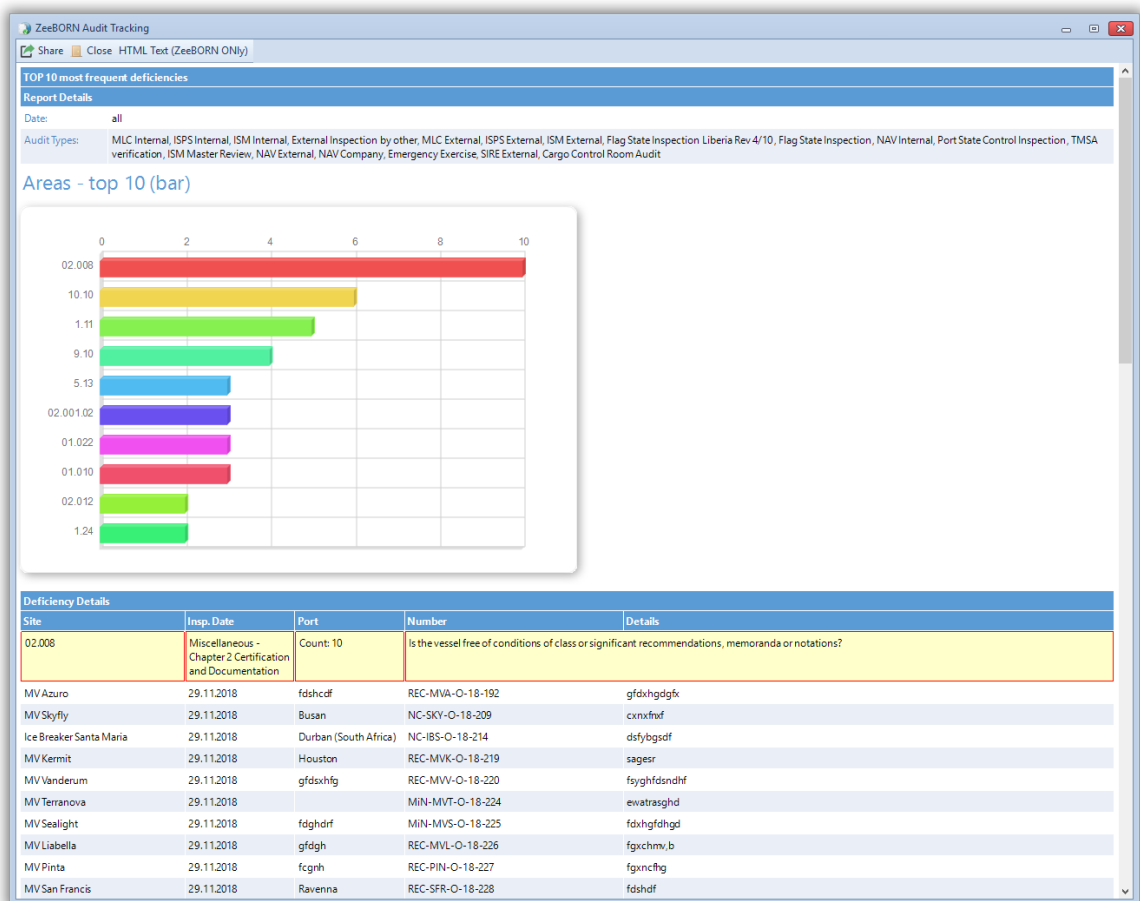
Date: all

Audit Types: MLC Internal, ISPS Internal, ISM Internal, External Inspection by other, MLC External, ISPS External, ISM External, Flag State Inspection Liberia Rev 4/10, Flag State Inspection, NAV Internal, Port State Control Inspection, TMSA verification, ISM Master Review, NAV External, NAV Company, Emergency Exercise, SIRE External, Cargo Control Room Audit

**Deficiency Details**

Site	Insp. Date	Port	Number	Details
02.008	Miscellaneous - Chapter 2 Certification and Documentation	Count: 10	Is the vessel free of conditions of class or significant recommendations, memoranda or notations?	
MVAzuro	29.11.2018	fdshcdf	REC-MVA-O-18-192	gfdxhgdfx
MV Skyfly	29.11.2018	Busan	NC-SKY-O-18-209	cxnxfmf
Ice Breaker Santa Maria	29.11.2018	Durban (South Africa)	NC-IBS-O-18-214	dsfybgdsf
MV Kermit	29.11.2018	Houston	REC-MVK-O-18-219	sagesr
MV Vanderum	29.11.2018	gfdshfg	REC-MVV-O-18-220	fsyghfndhf
MV Terranova	29.11.2018		MiN-MVT-O-18-224	ewatrasghd
MV Sealign	29.11.2018	fdghdrf	MiN-MVS-O-18-225	fdxhgfhdgd
MV Liabella	29.11.2018	gfdgh	REC-MVL-O-18-226	fgxchmw,b
MV Pinta	29.11.2018	fcgnh	REC-PIN-O-18-227	fgxncfng
MV San Francis	29.11.2018	Ravenna	REC-SFR-O-18-228	fdshdf
10.10	VIQ7 - Chapter 10. Engine and Steering Compartments	Count: 6	Are the engineers aware of the requirements and precautions necessary to control the change from residual to low-sulphur fuels and are these requirements posted?	
MV Stella Maris	21.11.2018	Durban (South Africa)	DEF-MSM-O-18-200	esztesw
MV Skyfly	22.11.2018	xy	DEF-SKY-O-18-198	ssdhfgh
MV Starlet	29.11.2018	sagfdsg	REC-MST-O-18-204	reghtrsdhnr
MV Elegance	29.11.2018	Montreal	MiN-MVE-O-18-217	gdfshfdhd
MV Pearldiver	29.11.2018	Monrovia	MiN-MVP-O-18-222	cvdyxbsdxbf
MV Chrystal	29.11.2018	fdsafg	MiN-MVC-O-18-223	wasgfsetdrft
1.11 01.010	VIQ7 - Chapter 1. General Information Miscellaneous - Chapter 1 General Information	Count: 5	Date and time the inspector departed the vessel: Date and time the inspector departed the vessel:	
MV Stella Maris	21.11.2018	Durban (South Africa)	DEF-MSM-O-18-202	fdshgfdh
MV Skyfly	22.11.2018	xy	DEF-SKY-O-18-189	vxyghrftc
MV Starlet	29.11.2018	sagfdsg	REC-MST-O-18-203	ysgbdsfg
MV Elegance	29.11.2018	Montreal	REC-MVE-O-18-216	asfdahhy

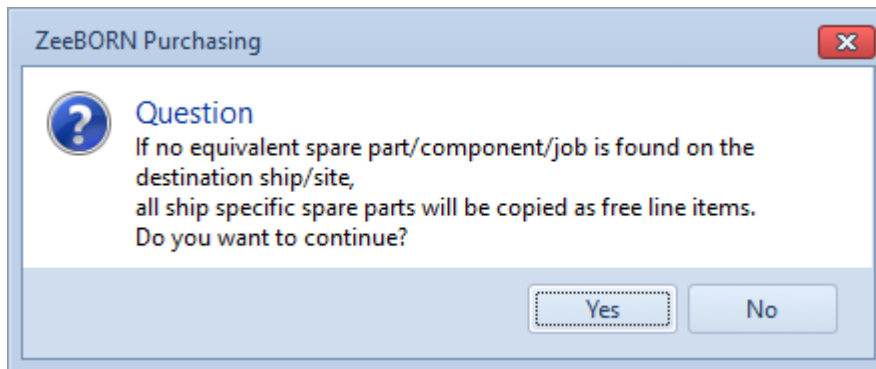
In addition, the report is now also available with a included chart:  
 Reports -> Most Frequent (Top 10) – with Chart:



## 24.1.7 Create on demand jobs

### Distribute

When distributing a service order to another ship, it can happen that the job will create as a free job - namely, when no equivalent job will be found on the destination ship.



After distributing an overview is available. It shows if spare parts and /or jobs were converted in free line items / free jobs.

**Document Viewer**

Back First Page Share

Spareparts/Jobs to Spareparts/Jobs/Free Line Items

SpareParts	Britannia	Dominga	Azuro	Galani	MV Maria Magdalena	MV Kermit	Elegance	San Francis	Terranova	Crystal
SQ-MVG-Y-15-0031200000000016										
VOID 7-56-0-V	crack repair (job)	Free Line Item	Free Line Item	Free Line Item	Free Line Item	Free Line Item	Job	Free Line Item	Free Line Item	Free Line Item

Close

You can recognize the free job by displaying job details without information from the maintenance system. It is because the free job is not linked to a maintenance job:

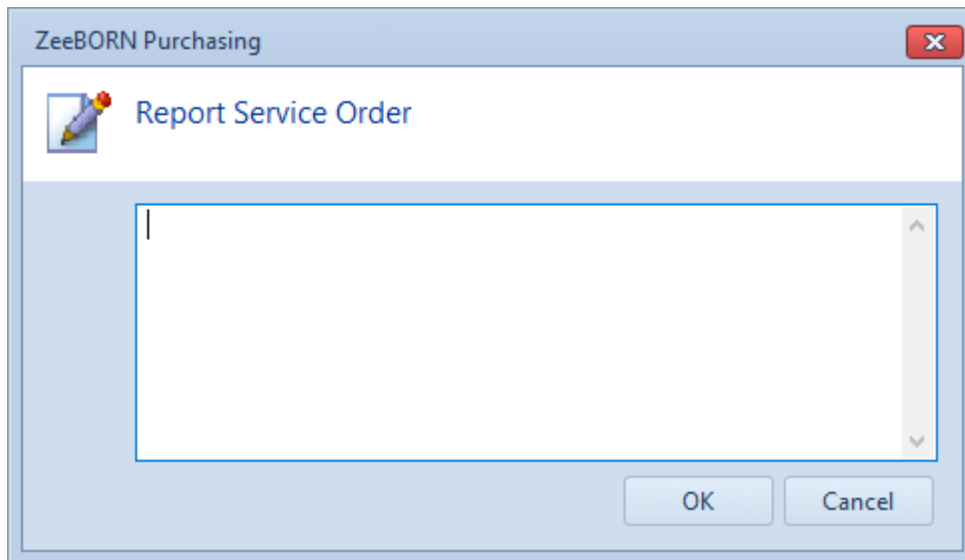
Item Details		Component Details (at time of item creation)	
Item Ref.:	1	Name:	Steel works and misc.
Name:	VOID 7-56-0-V, crack repair	Code/Internal No.:	2102
Status:	open	Path:	Technical = Hull
Quantity and Price:	1 per 0,00 (0,00 USD)	In operation since:	15.08.2002
Total Prices:	0,00 (0,00 USD)	Current Counter:	0
Internal Remark:	last execution: last counter: next expected execution: 23-Jan-15 expected counter: 0	Counter Date:	15.08.2002
		Average Running Time:	24

A normal job contains information about maintenance:

Maintenance Job Details	
Component:	Steel works and misc.
Job Title:	VOID 7-56-0-V, crack repair
Type:	only once
Interval:	every 0
Counter:	no
Depending:	
Priority:	1

A free job can only be reported via a simple remark field. There is no link to the maintenance module.





If you want to make the report visible in the maintenance system and be able to report it like a normal maintenance job, you now have the option of converting a free job into an "on demand job". This can be done with the following steps:

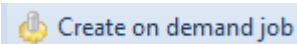
RQ:

- Open
- Approved on board
- Approved

PO:

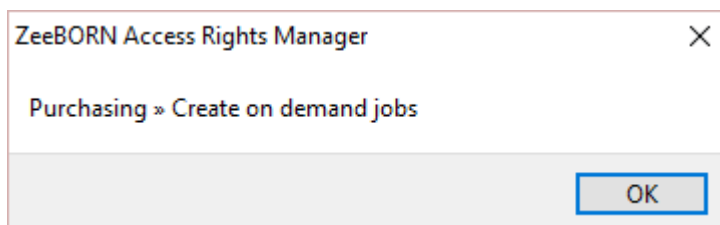
- Open
- Approved
- Sent, nicht reported

There is a new button "Create on demand job" for this:



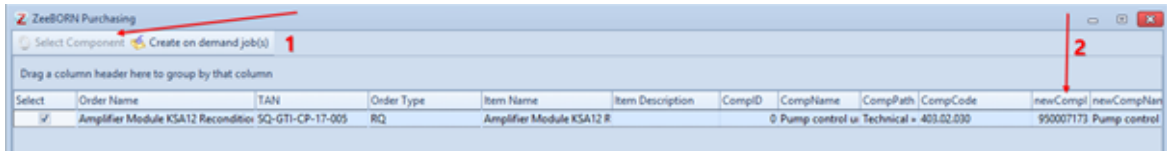
This button is only visible under the following conditions:

- the office license is active
- there is at least one free job in the SQ / SO
- the user has the following right to access:



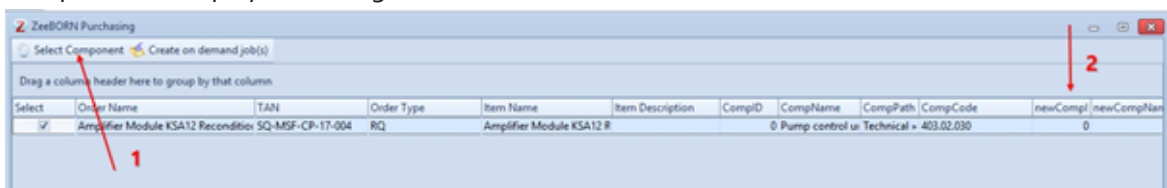
If the button is clicked, all free jobs of SQ/SO will be displayed in a separate form.

It is necessary that an "on demand job" must be linked to a component. The system already tries to find a suitable component when loading the free jobs. If a suitable component is found, it will also be displayed (1):



The button „Select Component“ is disabled in this case.

If no matching component is found, the button "Select Component" is enabled and no new component is displayed in the grid (1):

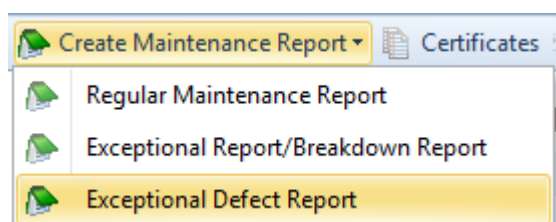
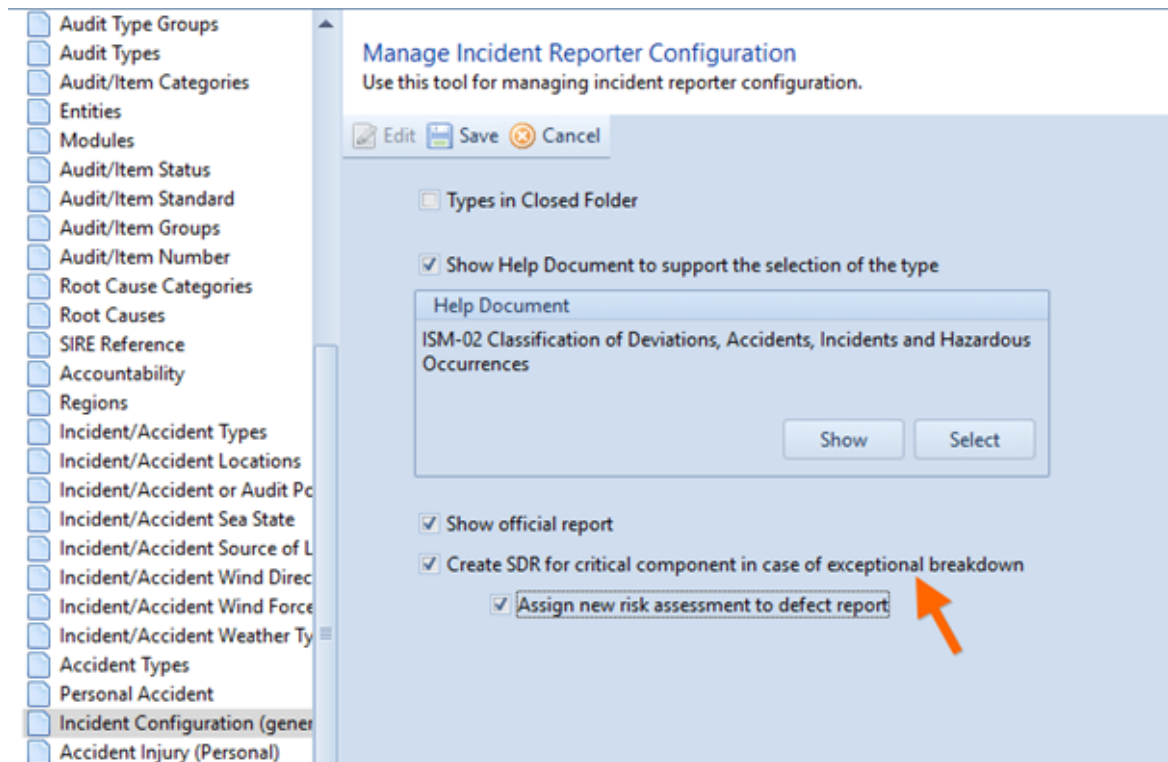


Then the selected jobs are created via "Create on demand job (s)" and are available on board after starting the next data transfer.

## 24.1.8 Ship Defect Report

We implemented a new button “Exceptional Defect Report”.

This functionality is only available for critical components. To use this functionality, it is necessary to hit check box “Create SDR for critical component in case of exceptional breakdown” in module "Incident Reports" under "Configuration". If a risk assessment is required after the ship defect, please hit check box “Assign new risk assessment to defect report”.



If you hit this button, a ship defect report for selected component will be created.

The screenshot displays the 'ZeeBORN Maintenance' application window. The interface is divided into several sections:

- Title:** A dropdown menu is set to 'MAIN ENGINE'. Below it, a text area contains the text 'exceptional defect report MAIN ENGINE'. Two orange arrows point to the dropdown and the text area.
- Description:** A large text area for entering the defect details.
- Root Cause Category:** A dropdown menu.
- Root Cause:** A dropdown menu.
- Cause(s) of failure(s):** A text area.
- SDR Defect Category:** A dropdown menu with a 'Clear' button.
- Failure Date:** A date selector set to '28.08.2018'.
- Impact Designation:** A dropdown menu.
- Position:** A dropdown menu, followed by 'Latitude' and 'Longitude' input fields, and radio buttons for 'Select Port' and 'Enter Port'.
- Report Tracking:** Fields for 'Report Date', 'Follow up information sent', and 'Defect Report closed', each with a dropdown menu.
- Reported By:** Radio buttons for 'Select Name' (set to 'Administrator') and 'Enter Name', with a 'Clear' button.
- Attachments:** A table with columns 'Title', 'Description', and 'Filename'. Below the table, it says '<No data to display>'. To the right are 'Attach', 'Show', and 'Delete' buttons.

Please fill in details and enter spare parts consumption and actions (immediate, preventive, corrective) on the next Tabs.

After saving the ship defect report a risk assessment must be created (copy from template) – if the check box is marked in the configuration as described above.

The created ship defect report will be shown on the components HTML overview.

TECHNICAL

- 51 Main propulsion system
  - MAIN ENGINE
    - 903 - CYLINDER LUBRICATION
    - 905 - CRANKSHAFT, THRUST BEARING AND TURNING GEAR
    - 906 - MECHANICAL CONTROL GEAR
    - 907 - STARTING AIR SYSTEM
    - 909 - FUEL OIL SYSTEM
    - 910 - TURBOCHARGER SYSTEM
    - 911 - SAFETY EQUIPMENT
    - 912 - ASSEMBLY OF LARGE PARTS
    - 913 - MAIN ENGINE TOOLS
    - Intermediate Shaft
    - OIL MIST DETECTOR
    - UNIT No.1
    - UNIT No.2
    - UNIT No.3
    - UNIT No.4
    - UNIT No.5
  - 52 Auxiliary engines
  - 53 Steering system
  - 54 Stern tube
  - 55 Boiler, Burner, Economizer
  - 56 Compressed Air System
  - 57 Purifiers
  - 58 Fuel Oil System
  - 59 Cooling system
  - 60 Lube oil system
  - 61 Inert Gas Plant & System
  - 62 Bilge Oily Water Separator
  - 63 Waste / oil and garbage disposal
  - 64 Provision refrigeration plant
  - 65 Electrical equipment
  - 66 Air condition units / Accommodation Ventilation System
  - 67 Fan/Ventilation System
  - 68 ICCP

Activate/Deactivate Change Request DEBUG

### Component Details for Component "903 - CYLIND

**Component Details**

- ID: 1003456650006
- Name: 903 - CYLINDER LUBRICATION
- Entry Type: Machinery Component
- Type: A1924448370
- Is Critical: Yes
- Manufacturer: SHIN HEUNG IND. CO., LTD.
- Serial No.: 8010701
- Built: 2009
- Average Running Time: 18,63
- Current Counter: 39,158
- Detailed Counter: base: 39.158; manual adjustment: 0; internal adjustment: 0
- Counter Date: 18.03.2017
- Start Counter: 0
- Has own Counter: No, receives counter updates from "TECHNICAL » 51 Main propulsion sys
- In Operation: since 07.07.2009

see also: [Maintenance Reports \(34\)](#) | [Spare Part List \(184\)](#) | [Certificates \(0\)](#)

### Defect Reports

TAN	Title	Description
<a href="#">180828 -SDR-HEB-903 -CYLINDER LUBRICATION</a>	903 - CYLINDER LUBRICATION	exceptional d

Maintenance Overview

With click on the link you can see the defect report details, containing the assigned risk assessment (1) and the spare parts consumption (2):

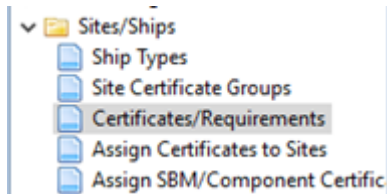
Ship Defect : 180828 -SDR -HER -903 - CYLINDER LUBRICATION		
Status:	open	
Site:	Hermione	
Internal TAN:	180828 -SDR -HER -903 - CYLINDER LUBRICATION	
General Data		
Reported by:	Administrator ((not assigned))	Entered by: Administrator ((not assigned))
Failure Date (local):	28.08.2018	
Type:		
Details:	exceptional defect report 903 - CYLINDER LUBRICATION	
Root Cause & Analysis		
Root Causes:	Category: <a href="#">Communication Inconsistently provided info</a>	
Closing Information		
Ship Defect reporting is a regulatory requirement as part of the ISM Code. The company analyses this information to incre environmental and management practices. Recording and trending is an integral part of the continuous improvement pr aims to match ever-improving best practice.		
Controls		
Risk Assessment reviewed	<a href="#">180828 -RA-201 -HER-Enclosed Space Entry</a>	
Operation Group:	General HRO	
Operation Type:	High Risk Operations	
Operation:	Enclosed Space Entry	
Supporting Information		
Spare Part Consumption		
Quantity	Internal No.	Article
-1 pcs		<a href="#">Mechanical seal</a>
-1 pcs		<a href="#">Set of bearings</a>
-1 pcs		<a href="#">set of wear rings</a>

The Ship Defect Report is than available in the open folder of the module "Incident Reports".

## 24.1.9 Site & Component Certificates (eng)

### CONFIGURATION

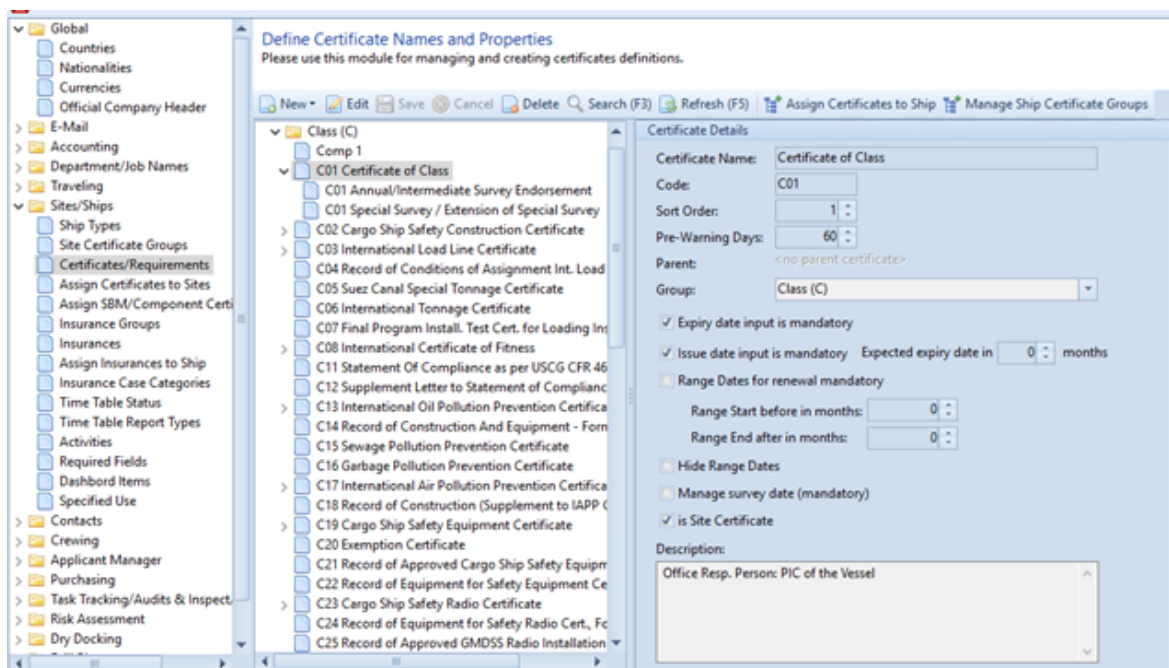
The general setup of the certificates is agreed and implemented in the office (Admin Tools / Configuration).



This includes:

- Setup of certificate groups
- Adding new certificates and sub-certificates to the system including certificate code
- Assignment of certificates to the respective vessels, i.e. defining which certificates need to be available on the vessel.

### Certificates/Requirements



For all certificates the needed requirements can be defined: e.g. pre-warning days (per default 60 days).

If dates are mandatory, please set check box. When the issue date is mandatory, the expected expire date can be given in months.

When a range date is possible, the corresponding check box has to be set. Additionally, the start and the end of the range date can be defined in month. These dates are calculated exactly from the expired date.

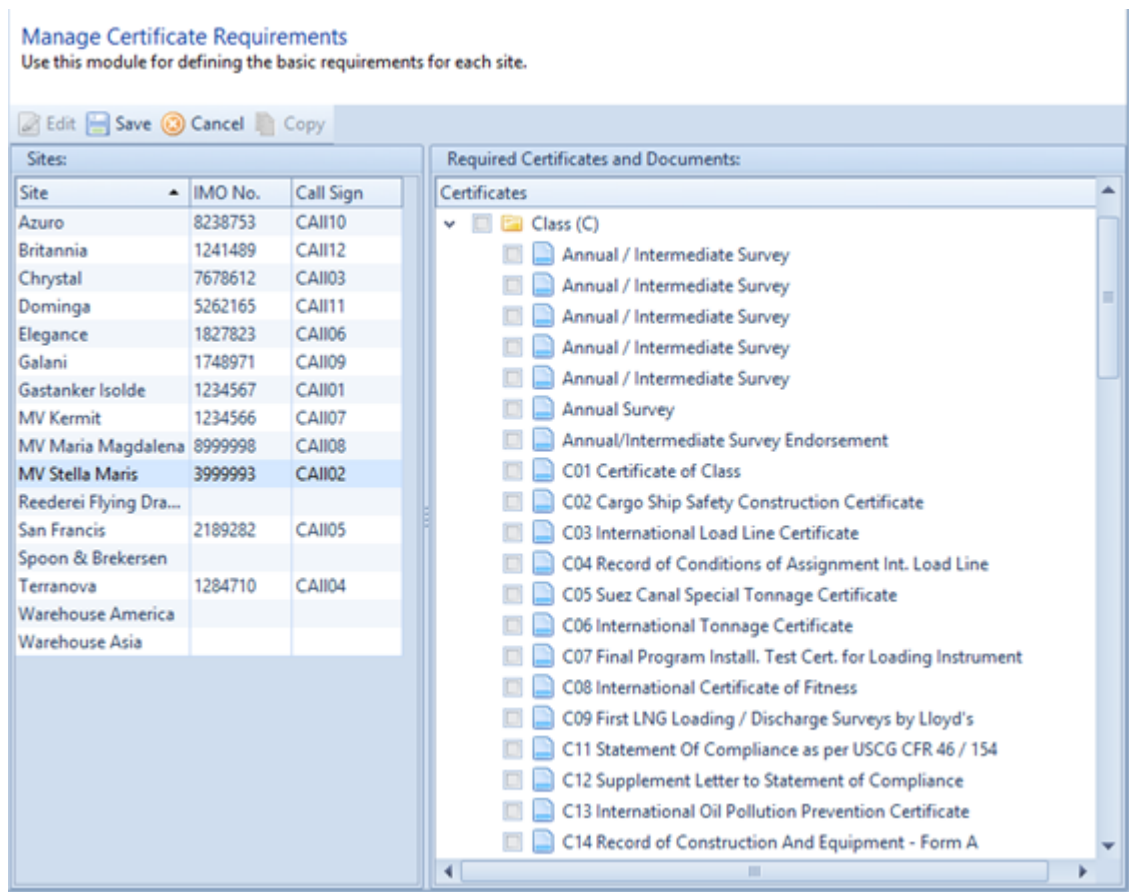
When the range date is not needed, please set check box "Hide Range Dates".

**Note: Both check boxes cannot set at the same time.**

If check box "Manage survey date (mandatory)" is set, a survey date will be displayed and has to be given.

## Assign Certificates to Sites

All certificates and sub-certificates which are marked as Site Certificates will be shown in line. Choose all needed certificates and with "Save" selection will be recorded



When the selection of one vessel is finished, it is possible to copy this selection to other vessels.

## Assign SBM / Component Certificates to Sites

All certificates and sub-certificates which are **not** marked as Site Certificates will be shown in line. Choose all needed certificates and with "Save" selection will be recorded.

It is also possible to copy the selection to other ships by clicking "Copy".



## SITE CERTIFICATES

### TAB "Certificates Overview"

Module **Overview - Ship/Site Status**. Under the TAB "**Site Certificates**" you will find the certificates.

Three views are available, per default the **Overview** is set.

Class (C)	Code	Certificate	Date	Next Survey Date	Status	Range Date for next survey date or renewal	Expiry Date	Edit
	C01	Certificate of Class				31.07.2022 - 30.10.2022	not due	30.10.2022
		Annual/Intermediate Survey Endorsement				05.09.2019 - 05.10.2019	not due	05.10.2019
	C02	(Missing) Cargo Ship Safety Construction Certificate						
		(Missing) Annual / Intermediate Survey						
	C03	International Load Line Certificate					not due	30.10.2019
		Annual Surveys				01.02.2019 - 31.03.2019	due	28.02.2019
	C04	Record of Conditions of Assignment Int. Load Line						
	C05	Suez Canal Special Tonnage Certificate						
	C06	International Tonnage Certificate						
	C07	Final Program Install. Test Cert. for Loading Instrument						
	C08	International Certificate of Fitness					not due	30.10.2019
	C09	First LNG Loading / Discharge Surveys by Uluçlu						
	C11	Statement of Compliance as per USCG CFR 46 / 154						

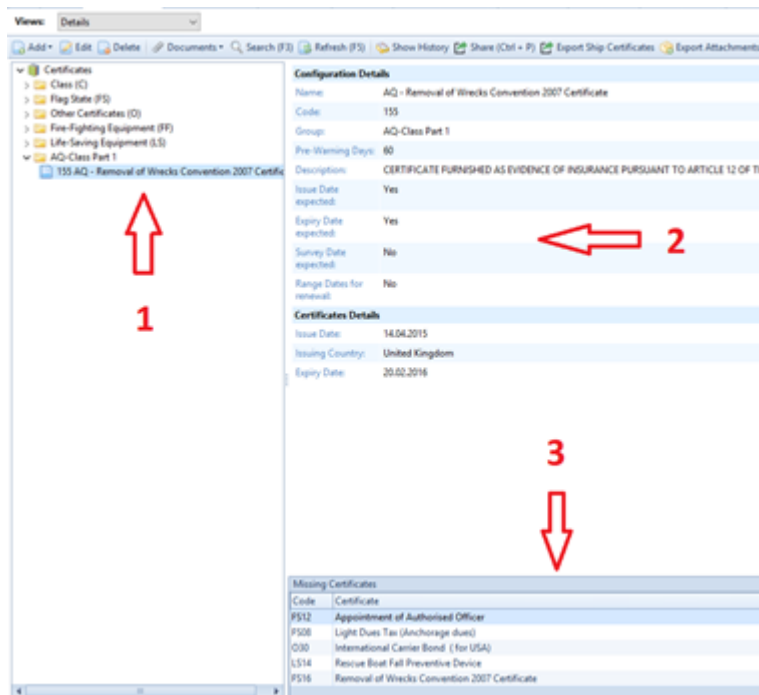
All assigned certificates are listed including their expiry dates. A click on the certificate will open the details (Issue Date, Document Number etc.).

With "Edit" a single certificate can be edited directly in overview.

### TAB "Details"

The TAB "Details" is split in three areas:

- On left sites all inserted certificates sort by certificates group will be shown (1)
- On right site all details of selected certificate will be shown (2)
- On bottom all missing certificates will be shown (3)



Under the view **Details** you can work on the certificates, add new ones or attach copies of certificates (depending on your access rights).

### Add a Missing Certificate

All certificates which were earlier assigned to the vessel in the configuration can be selected by right-click on the certificate on the lower right side of the screen. Alternatively choose **"Add/required Certificates only"**. For a complete list of all available certificates choose **"Add/all Certificates"**, however, it should rarely be the case that certificates need to be added which are not assigned to your vessel.

The screenshot shows the 'ZeeBORN Overview' window. At the top, there are 'Save' and 'Cancel' buttons. Below that, the 'Group' is set to 'Travel' and the 'Certificate' is 'Hydrostatic Release unit'. The 'Details' section includes fields for 'Issue Date', 'Issuing Authority', 'Issue Country' (with a 'Clear' button), and 'Document No.'. There is a 'Remarks' text area and a checkbox for 'use Remarks in Printout'. The 'Dates' section has an 'Expiry Date' field and a 'Range Dates for Renewal' section with 'Start' and 'End' dropdowns and a 'Get' button. The 'Attachments' section is a table with columns 'Title', 'Description', and 'Filename', currently showing '<No data to display>'. To the right of the table are 'Attach', 'Show', and 'Delete' buttons.

All relevant details have to be inserted, e.g. Issue Date, Issuing Authority, Expiry Date. If a time slot is to be set, the start-and end date has to be added here as well

A copy of the certificate can be added under button **Documents**. **Please don't add high-resolution attachments as this will drastically increase the size of the data transfer.**

## Renew a Certificate

If a new certificate was issued, hit **"Edit"** to adjust the details, fill in a new issue-and expiry date and replace the attachment by removing the outdated certificate copy and adding the new one.

## Other Functions



For each certificate document can be added, deleted or shown.

In all certificates can be searched for words or phrases.

The history of the selected certificate can be shown.

The functions "Share", "Export Ship Certificates" and "Export Attachments" are also available.

## TAB "Missing or overdue certificates"

All missing and overdue certificates will be shown. With "Edit" a single certificate can be edited directly.

With "Share (CTRL + P)" the list of missing and overdue certificates can be print.

Views: Missing or overdue Certificat

Share (Ctrl + P)

### MV Stella Maris - Certificates Overview

Art.	Code	Certificate	Status	Expiry Date	Date	Status	Range	Edit
<b>Class (C)</b>								
		Annual/Intermediate Survey Endorsement	overdue		05.10.2016	overdue	01.08.2016 - 30.11.2016	Edit
		Annual / Intermediate Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Annual Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Annual / Intermediate Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Annual / Intermediate Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Annual / Intermediate Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Annual / Intermediate Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Periodical Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
		Periodical Survey	overdue		05.10.2015	overdue	01.08.2015 - 30.01.2016	Edit
C37		YDR Certificate of Compliance - Annual survey	overdue		05.10.2015			Edit
<b>Flag State (FS)</b>								
F503		German Certificate of registry	overdue		30.10.2015			Edit
F508		[Missing] Light Dues Tax (Anchorage dues)						

When the link “show Details” in TAB “Info” will be followed, the system jumps to TAB “missing or overdue certificates” directly and will not be shown Tab “Overview”.

## SBM / COMPONENT CERTIFICATES

### TAB “Certificates Overview”

Module **Overview - Ship/Site Status**. Under the TAB “**SBM & Component Certificates**” you will find the certificates.

Three views are available, per default the **Overview** is set.

Views: Overview

Share

### Britannia - Component Certificates Overview

Art.	Code	Certificate	Component	Status	Expiry Date	Date	Status	Range Dates	Edit
<b>01 Life-Saving Equipment</b>									
	01.17	[Missing] EEBD - annual							
	01.01	Life Rafts		not due		01.08.2017			Edit
<b>02 Fire-Fighting Equipment</b>									
	02.01	[Missing] CO2-System - annual							
<b>03 Medical Equipment</b>									
	03.01	[Missing] Medical Oxygen Sets - annual							
	03.02	Medical Oxygen Cylinders Refill - 3 years		overdue		31.12.2016			Edit

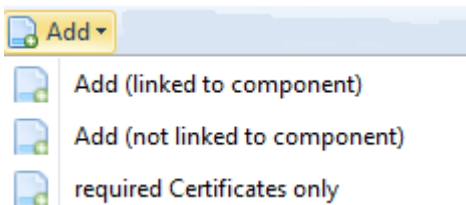
All assigned certificates are listed including their expiry dates. A click on the certificate will open the details (Issue Date, Document Number etc.).

With “Edit” a single certificate can be edited directly in overview.

### Add a Missing Certificate or other Certificate

All certificates which were earlier assigned to the vessel in the configuration can be selected by right-click on the certificate on the lower right side of the screen.

Alternatively choose “**Add**” and then “**required Certificates only**”.



All not required certificates can be chosen by clicking "Add". With (linked to component) the certificate will be linked to a component and with (not linked to a component) the certificate will be shown only in TAB "SBM / Component Certificates".

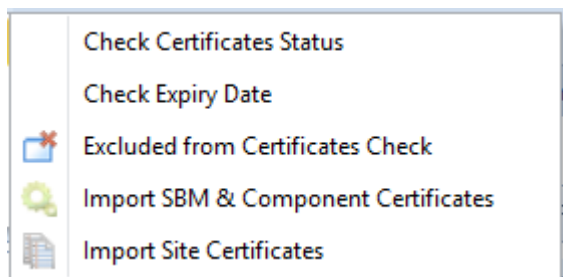
All relevant details have to be inserted, e.g. Issue Date, Issuing Authority, Expiry Date. If a time slot is to be set, the start-and end date has to be added here as well.

A copy of the certificate can be added under button "**Documents**". Please don't add high-resolution attachments as this will drastically increase the size of the data transfer.

### Renew a Certificate

If a new certificate was issued, click the button "**Edit**" to adjust the details, fill in a new issue- and expiry date and replace the attachment by removing the outdated certificate copy and adding the new one.

## REPORTS



### Check Certificates Status

Calls up a report of all certificates which can be sorted as desired and exported or printed. Same report can be called up from office side for the whole fleet (→ Ship/Site Status – Reports / Certificates / Check Certificates Status).

### Check Expiry Date

Under Ship/Site Status – Reports / Certificates / Check Expiry Date

### Excluded from Certificates Check

The function "exclude from Certificates check" will be insert in system in the next year.

### Import SBM & Component Certificates

It is possible to import an excel sheet with filled data of SBM / Component Certificates in database. The excel sheet has to be prepared by ZeeBORN and can be filled in from ships or Office.

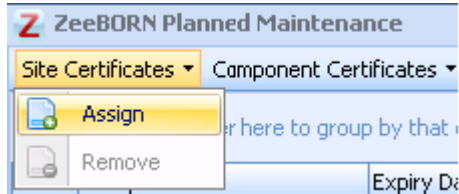
### Import Site Certificates

It is possible to import an excel sheet with filled data of Site Certificates in database. The excel sheet has to be prepared by ZeeBORN and can be filled in from ships or Office.

## ADD a CERTIFICATE to a COMPONENT

If desired you can establish a link between a certificate and a component. For this purpose hit the button "**Certificates**" under the respective component.

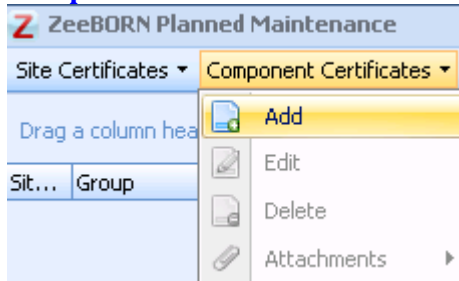
### Site Certificates



Select button "**Site Certificates**" in order to link a site certificate to this component.

**Note:** Only certificates which were already assigned in the certificates modules can be selected here.

### Component Certificates





Select button "**Component Certificates**" in order to add a component certificate to this component.

**Note:** Only certificates which are not considered site certificates (not having the check-mark in the configuration) can be selected here. Before adding any component certificate here, same has to be implemented from office side under the configuration (see section 1).

## Explanation of Icons/Terms

- Attachments: If available this is marked by the icon of a paper clip
- Certificate Status:
  1. green → not due
  2. yellow → due (within a configurable number of days)
  3. red → overdue
- Status + (nr): Certificate is not required, i.e. not assigned to this vessel in the configuration
- [Missing]: A certificate is assigned to a vessel (i.e. it is required), however, details for same are missing
- Time Slot: Interval in which a certificate can be renewed. **Note:** A certificate/annual survey can be overdue while it is still in the allowed time slot for renewal - time slot status will be yellow

- Time Slot Status: yellow → Interval started or certificate is within interval/ blank → Interval has not yet started / red → time slot has passed

Att.	Code	Certificate	Expiry Date		Time Slot	
			Status	Date	Status	Interval
Class						
	C1	<a href="#">Certificate of Class</a>	<span style="color: green;">●</span> not due	30.10.2017		30.07.2017 - 30.10.2017
		[Missing] Special Survey / Extension of Special Survey				
		<a href="#">Annual / Intermediate Survey Endorsements</a>	<span style="color: red;">●</span> overdue	21.05.2013	<span style="color: orange;">●</span> due	21.02.2013 - 21.08.2013

### Print Functions

- Share: will open the regular print-and save functions
- Print Official: calls up the official printout of the certificates including Company header

#### 24.1.10 Copying Ship Data

One option for starting a new database for a ship is to create a copy of an existing ship and apply necessary modifications later on (e.g. adjusting serial numbers, resetting maintenance job execution history etc.).

The following procedures are described in this tutorial:

1. Create a new ship.
2. Copy data from one ship to another.

3. Apply necessary adjustments.

### Create a new ship

A new ship can be created in the Overview section of the system by using the menu **New > Ship**.

Just enter the name of the ship and the IMO number. After clicking OK, the database for the new ship will be created.

### Copy data from one ship to another.

This procedure requires some extended knowledge about the database structure used by the system. Please see topic "[%ZeeBORNDATA%<sup>363</sup>](#)" for more information.

Before copying the ship data you'll need to identify the IMO number of the ship to be copied and the IMO number of the ship. It's also recommended to close all ZeeBORN software before copying the data.

The easiest way to copy the data is to open a Windows command line.

Use the following command to copy the ship data - please replace *sourceimo* and *destinationimo* with the actual IMO numbers of the related ships:

```
xcopy %zeeborndata%\db\sourceimo\*.* %zeeborndata%\db\destinationimo\ /y
```

### Apply necessary adjustments

The type of adjustments to be considered depend on if the ship is a new-building or if it might be already in operation for a while.

### Adjustments for new-buildings

New built ships require a reset of all settings in the database that store lifetime data of a ship. This includes reports for executed maintenance jobs, spare part consumption tracking but also current running hour counter values and start dates for maintenance job due data calculation. Please ask ZeeBORN Support for assistance. The support team will provide SQL scripts that help you with performing the necessary reset.

### Adjustments for ships in operation

Please contact ZeeBORN Support for getting assistance as there are many options to be considered for adjusting the copied data to the actual situation on board.

You'll find many helpful functions in the system if you are logged in as Administrator. Within the Planned Maintenance module you'll find many useful tools after right-clicking on a component's name in the tree view. Especially the menu [Kozlowski Tools<sup>360</sup>](#) provides some powerful functions that also allow a transfer of single components between two ships.



## 24.2 Tutorials Deutsch

Das ist der Abschnitt mit ZeeBORN Tutorials in deutscher Sprache.

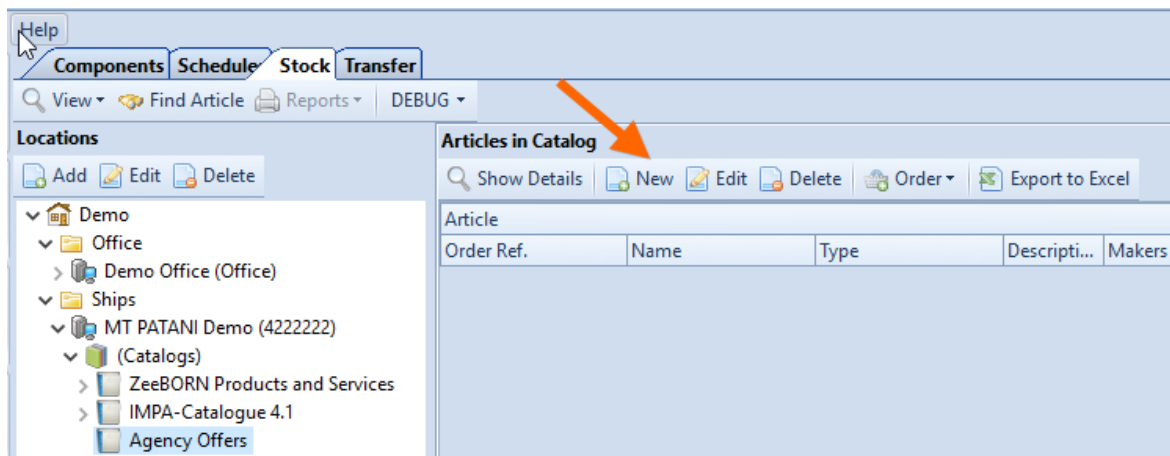
### 24.2.1 Agency Requests (deu)

#### Vorbereitung

Agency Requests können entweder Free Line Items oder Catalog Items enthalten. Um die Catalog Items zu verwalten, muss man das Maintenance Module starten. Dann auf den TAB „Stock“ wechseln. Hier den gewünschten Katalog aufrufen. **Hinweis:** „Catalogs“ werden global verwaltet, d.h. jedes Schiff und Office enthält denselben Katalog. Änderungen müssen also nur einmal vorgenommen werden.

Ein neuer Katalog wird angelegt, indem man im Baum den Folder „Catalogs“ selektiert, dann über die Rechte-Maus-Taste den Button „Add“ betätigen.

Neue Catalog Items werden angelegt, indem man den gewünschten Katalog auswählt und den Button „New“ im rechten Bereich betätigt.



Name und eventuell die Description erfassen. Es kann gleich ein gewünschter Cost Account erfasst werden – dieser wird dann bei der Auswahl dieses Items mit in den Request übernommen.

#### Anlegen einer Agency Request

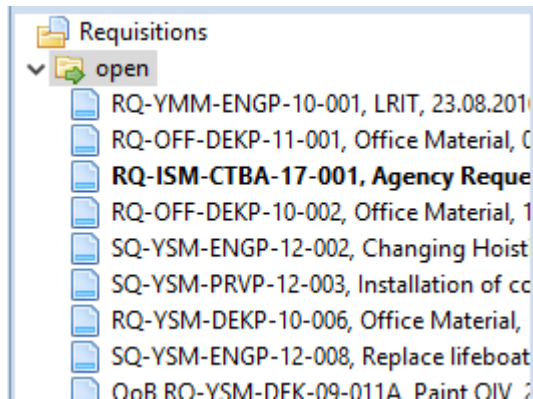
Zum Anlegen der Agency Request das Purchase Module öffnen und hier den Button „New Agency Request“ klicken. Der Button ist nur im Office sichtbar und setzt ein spezielles Nutzerrecht voraus.

Wird ein neuer Agency Request angelegt, so nimmt das System folgende Standardeinstellungen vor:

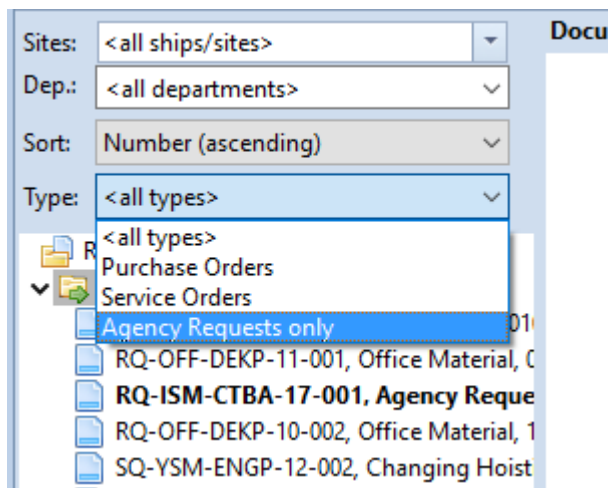
- Die Checkbox „for all items“ bezogen auf einen gemeinsamen Cost Account wird nicht aktiviert (d.h. für jedes Item wird ein separater Cost Account benötigt) und deaktiviert.
- Das Feld "Supplier Address" wurde in "Agency Address" umbenannt.

- Es kann nur zwischen folgenden Artikeln gewählt werden: "Free Line Item" oder "Catalog Items".

Nach der Bearbeitung wird die Agenturanfrage fett im Baum markiert:



Wählen Sie "Type" in der Checkbox und "Agency Requests only" werden im Baum angezeigt:



In der Dokumentenansicht gibt es einen Hinweis, dass es sich um eine "Agency Request" handelt:



**Requisition (Agency Request) RQ-ISM-CTBA-17-001**  
**Agency Request**  
**Ice Breaker Santa Maria - 1234568**  
**Expected Delivery Date:**

Booking Date:

### 24.2.2 Copy Ship Data (deu)

Eine Option zum Starten einer neuen Datenbank für ein Schiff ist, eine Kopie eines vorhandenen Schiffs zu erstellen und später die erforderlichen Änderungen vorzunehmen (z.B. Seriennummern anpassen, den Ausführungsverlauf eines Wartungsjobs zurücksetzen usw.).

Das weitere Vorgehen wird in dieser Anleitung beschrieben:

1. Ein neues Schiff anlegen.
2. Daten von einem Schiff in ein anderes kopieren.
3. Nehmen Sie die erforderlichen Anpassungen vor.

#### 1) Ein neues Schiff erstellen

Ein neues Schiff kann im Übersichtsbereich des Systems über das Menü **New > Ship** erstellt werden. Geben Sie einfach den Namen des Schiffes und die IMO-Nummer ein. Nachdem Sie auf "OK" geklickt haben, wird die Datenbank für das neue Schiff erstellt.

#### 2) Daten von einem Schiff in ein anderes kopieren

Für dieses Vorgehen sind einige erweiterte Kenntnisse der vom System verwendeten Datenbankstruktur erforderlich. Weitere Informationen finden Sie unter "[%ZeeBORNDATA%<sup>363</sup>](#)". Vor dem Kopieren der Schiffsdaten müssen Sie die IMO-Nummer des zu kopierenden Schiffs und die IMO-Nummer des Schiffes ermitteln. Es wird außerdem empfohlen, vor dem Kopieren der Daten die gesamte ZeeBORN -Software zu schließen.

Am einfachsten kopieren Sie die Daten, indem Sie eine Windows-Befehlszeile öffnen.

Verwenden Sie den folgenden Befehl, um die Schiffsdaten zu kopieren - ersetzen Sie *sourceimo* und *destinationimo* durch die aktuellen IMO-Nummern der zugehörigen Schiffe:

```
xcopy %zeeborndata%\db\sourceimo\*.* %zeeborndata%\db\destinationimo\ /y
```

### 3) Nehmen Sie die erforderlichen Anpassungen vor

Die zu berücksichtigenden Anpassungen hängen davon ab, ob es sich bei dem Schiff um einen Neubau handelt oder ob es ein Schiff ist, das bereits schon in Betrieb genommen wurde.

#### Anpassungen für Neubauten

Für Neubauten müssen alle Einstellungen in der Datenbank zurückgesetzt werden, in denen die Laufzeit eines Schiffes gespeichert sind. Dazu gehören Berichte für ausgeführte Wartungsjobs, die Überwachung des Ersatzteilverbrauchs, aber auch die aktuellen Werte des Betriebsstundenzählers und die Startdaten für die Berechnung der fälligen Wartungsjobs. Bitte nutzen Sie den ZeeBORN Support zur Unterstützung. Das Support-Team stellt SQL-Skripts bereit, die Sie beim Ausführen des erforderlichen Zurücksetzens unterstützen.

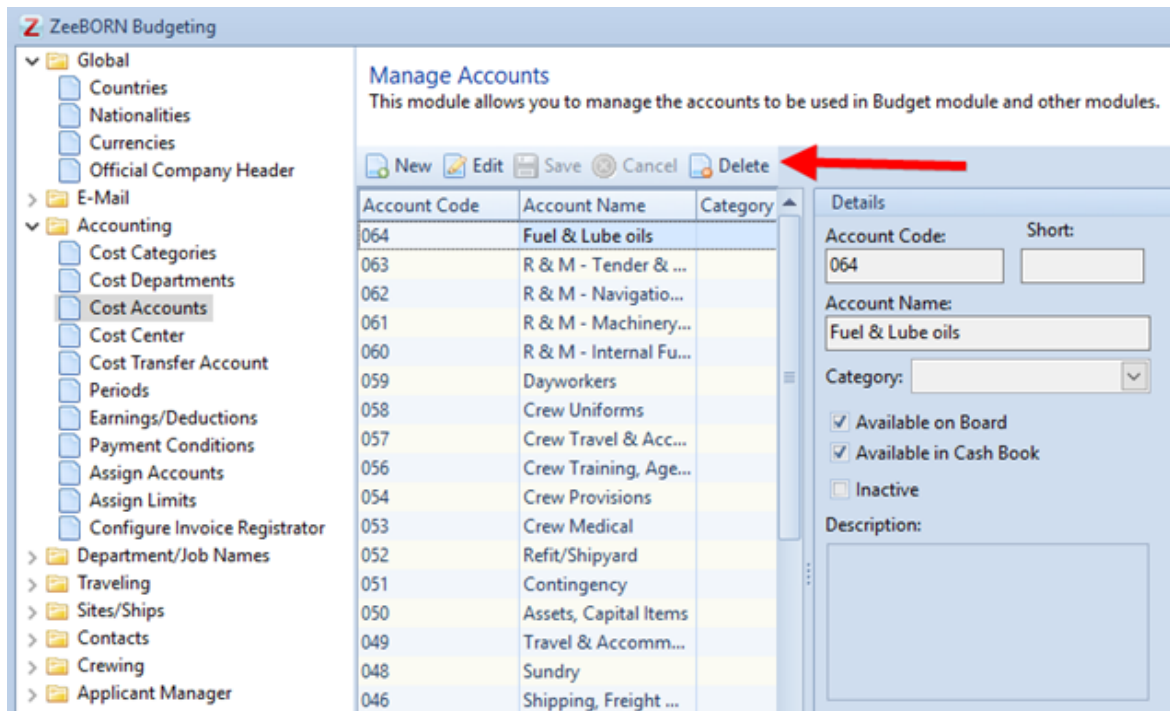
#### Anpassungen für bereits in Betrieb genommene Schiffe

Bitte wenden Sie sich an den ZeeBORN Support, um Hilfestellung zu erhalten, da es viele Optionen gibt, um die kopierten Daten an die tatsächliche Situation an Bord anzupassen. Sie finden viele hilfreiche Funktionen im System, wenn Sie als Administrator angemeldet sind. Im Planned Maintenance Modul finden Sie viele praktische Tools. Klicken Sie mit der rechten Maustaste auf den Namen einer Komponente in der Baumstruktur. Insbesondere bieten Ihnen die [Kozłowski Tools](#)<sup>360</sup> sehr nützliche Funktionen, die auch die Übertragung einzelner Komponenten zwischen zwei Schiffen ermöglichen.

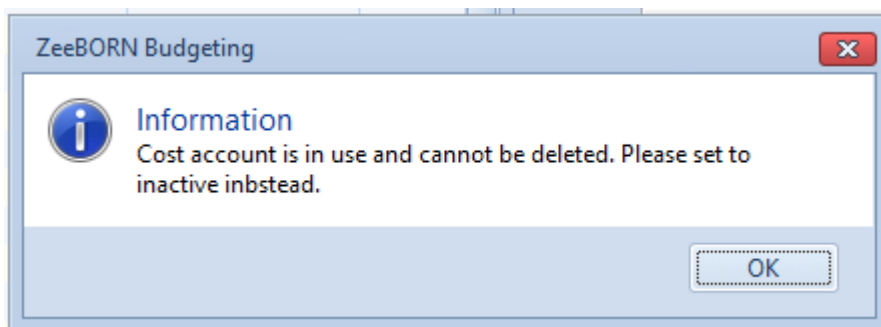
### 24.2.3 How to change accounts

Um die Accounts für alle Schiffe ändern zu können, muss man im Bereich „Overview“ in „Admin Tools/Configuration“ gehen. Dort findet man im Abschnitt „Accounting“ dann „Cost Accounts“.

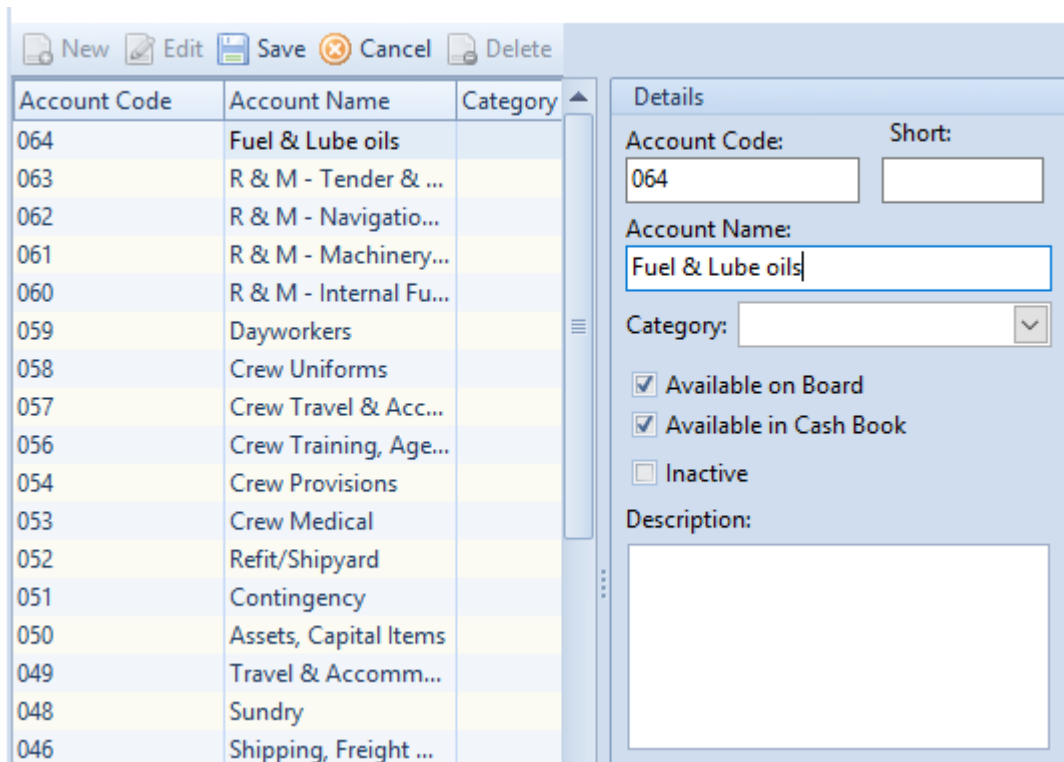




Ist der Account schon in Benutzung wird die folgende Information angezeigt:

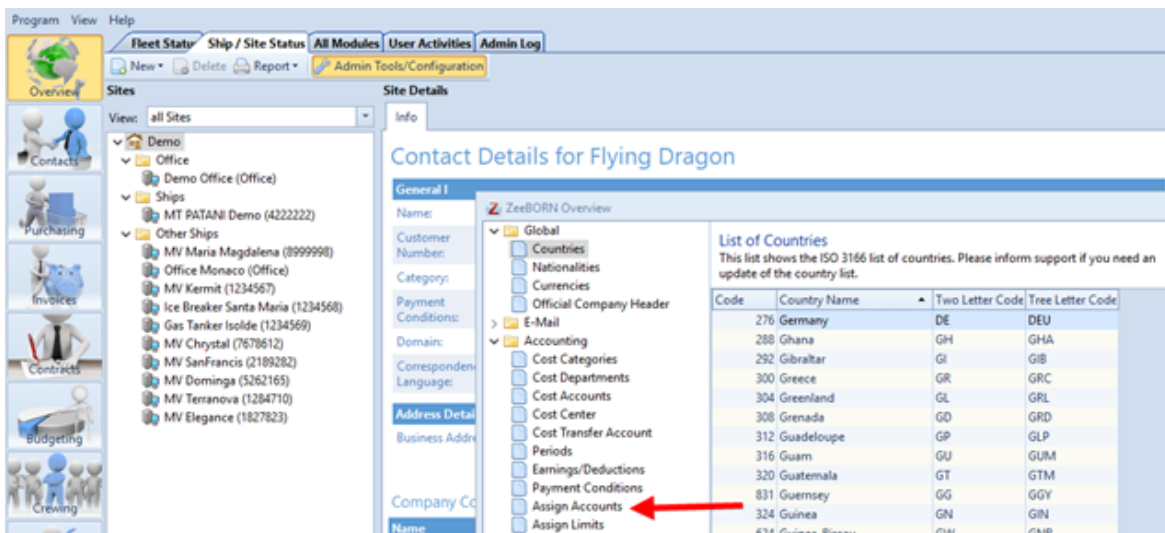


Dann muss der Account mit „Edit“ und wählen der Checkbox „Inactive“ deaktiviert werden. Mit „Save“ wird der Vorgang gespeichert.

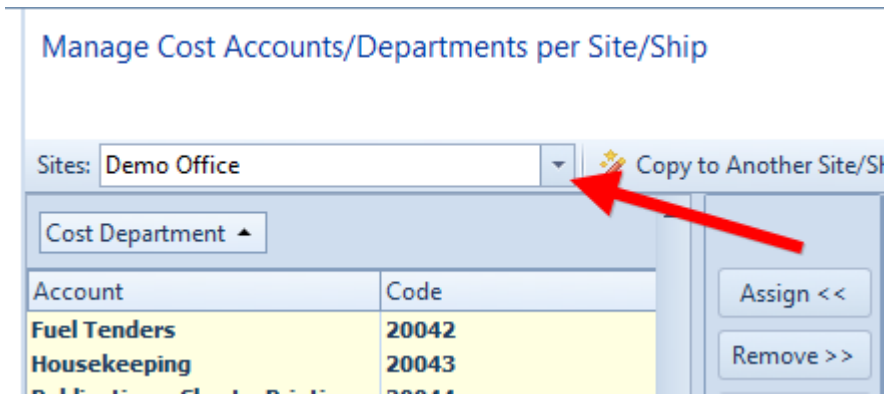


Im „Edit“- Bereich können außerdem der Name, der Account Code und die Description geändert werden.

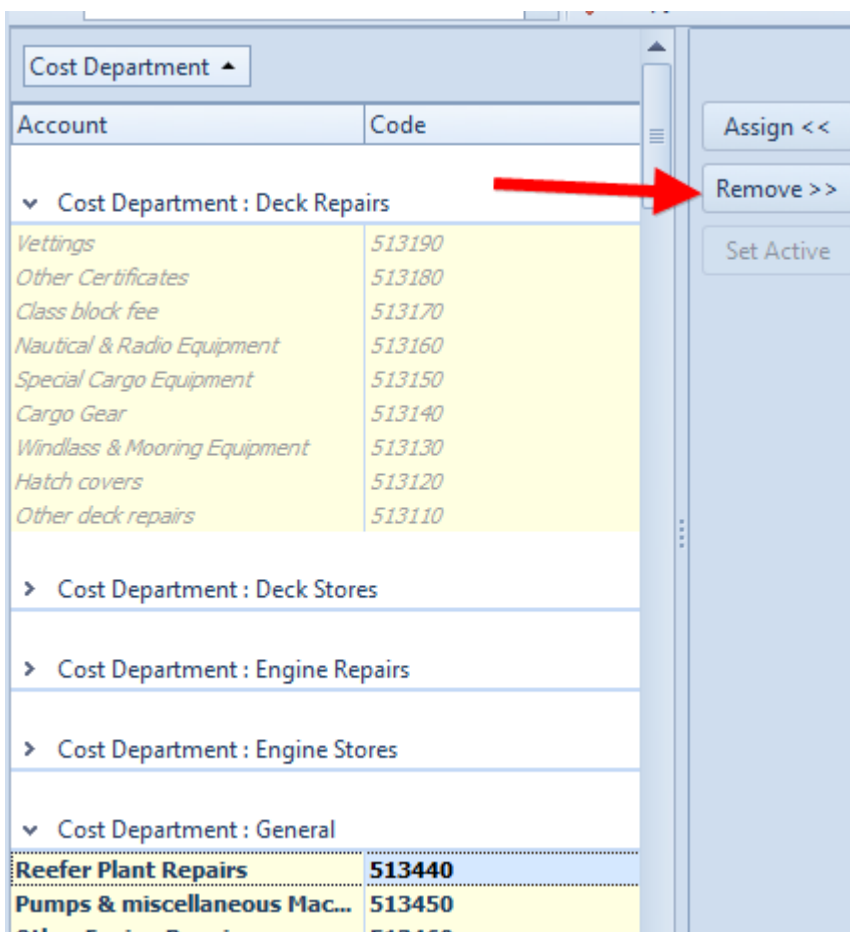
Um Accounts für einzelne Schiffe zu entfernen, bitte in den Bereich „Assign Accounts“ gehen.



Nun muss das Schiff ausgewählt werden.

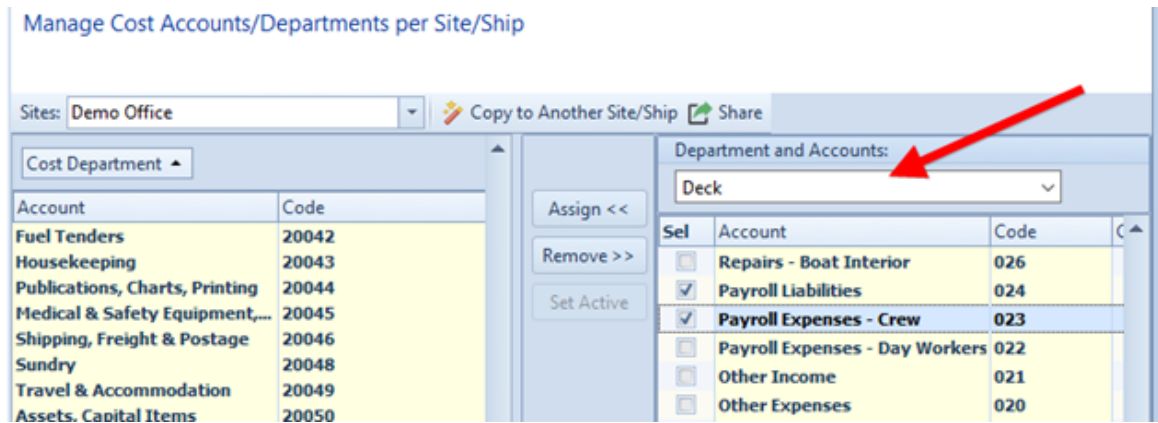


Jetzt wird der Account, mit einem Klick auf den Account, ausgewählt und mit „Remove“ entfernt. Wurde der Account bisher noch nicht benutzt, verschwindet er aus der Liste, war der Account schon in Benutzung erscheint er grau hinterlegt.



Mit „Assign“ können noch nicht zugewiesene Accounts dem Schiff zugewiesen werden.



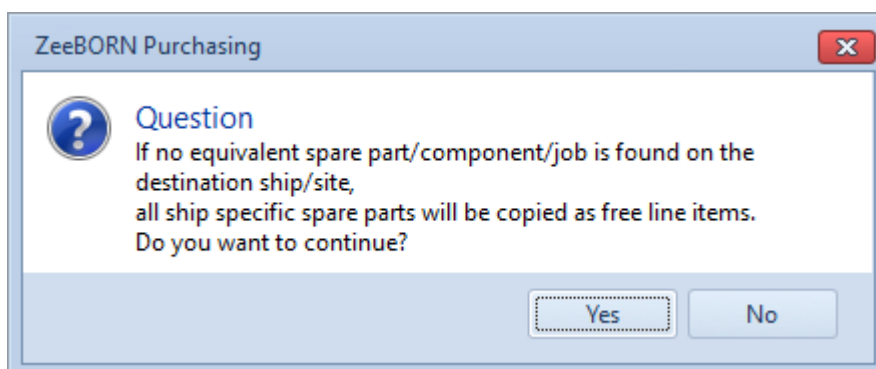


Dafür wird als erstes das Department gewählt und dann die Accounts ausgewählt. Dann werden die Accounts mit "Assign" dem Schiff zugewiesen.

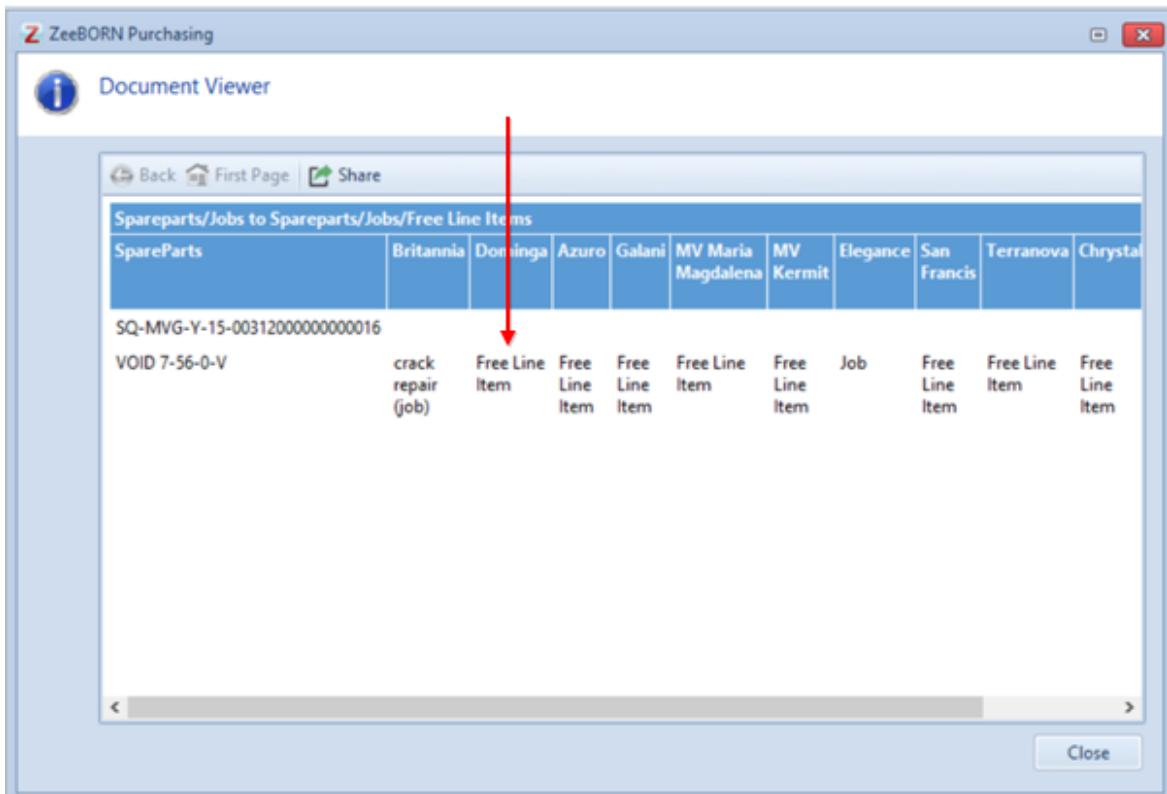
#### 24.2.4 Create on demand jobs

##### Distribute

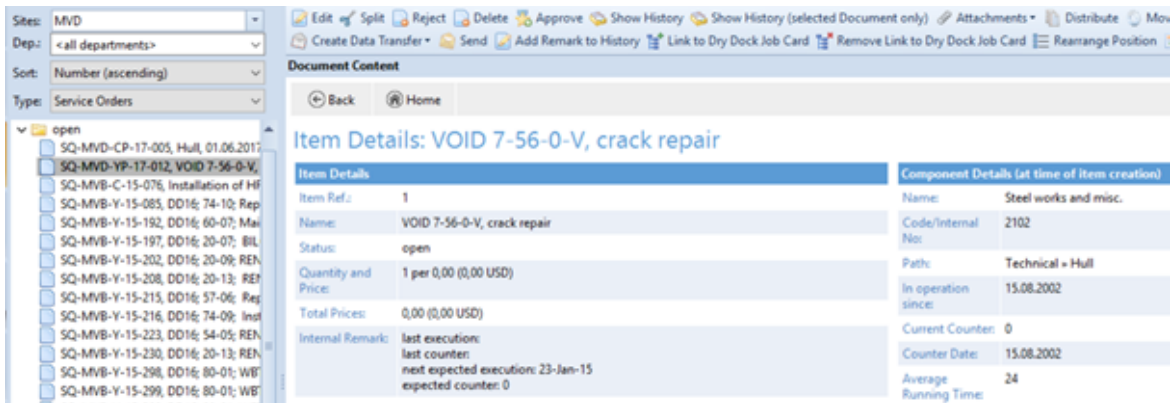
Beim Weiterleiten einer Service Order auf ein anderes Schiff kann es passieren, dass der Job als free job angelegt wird – nämlich dann, wenn er auf dem Zielschiff nicht vorhanden ist.



Nach dem Distributen erhält man eine Übersicht, ob es Spareparts und / oder Jobs gibt, die zu free line items/ free jobs gewandelt wurden.



Einen free job erkennt man auch daran, dass in den Jobdetails keine Informationen aus dem Maintenance angezeigt werden, da der Job ja nicht mit einem Job aus dem Maintenance verknüpft ist:



Ein normaler Job hingegen enthält Maintenance Infos

The screenshot displays a software interface with a list of service orders on the left and detailed information for a specific item on the right. The list on the left includes various items like 'SQ-GTI-P-17-022, VOID 7-56-0-V, cre...' and 'SQ-MVE-YP-17-017, VOID 7-56-0-V, ...'. The right side shows 'Item Details: VOID 7-56-0-V, crack repair' with fields for Name, Status, Quantity and Price, Total Prices, Internal Remark, Cost, and Department. Below this is a 'Maintenance Job Details' section for the same item, showing Component, Job Title, Type, Interval, Counter, Depending, and Priority. A red arrow points from the 'Internal Remark' field in the 'Item Details' section to the 'Maintenance Job Details' section below it.

Ein free job kann nur über ein einfaches Remarkfeld reported werden, es gibt keine Verbindung zum Maintenance.

The screenshot shows a dialog box titled 'ZeeBORN Purchasing' with a close button in the top right corner. The main area contains a pencil icon and the text 'Report Service Order'. Below this is a large, empty text input field for reporting the service order. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Möchte man jedoch den Report auch im Maintenance sichtbar machen und ihn wie einen normalen Maintenance Job reporten können, so gibt es jetzt die Möglichkeit, einen „free job“ in einen „on demand job“ zu wandeln. Dies erfolgt in den folgenden Schritten:

- RQ:
- Open

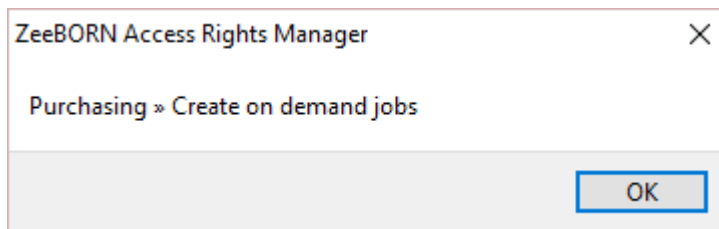
- Approved on board
  - Approved
- PO:
- Open
  - Approved
  - Sent, nicht reported

Dazu gibt es einen neuen Button "Create on demand job":



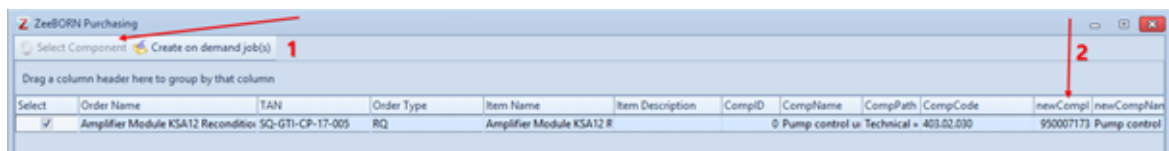
Dieser Button ist nur unter folgenden Bedingungen sichtbar:

- die Office-Lizenz ist aktiv
- in der SQ/SO gibt es mindestens einen free job
- der User hat folgendes Recht:



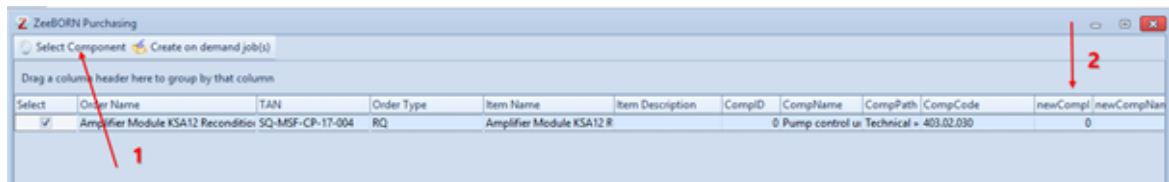
Wird der Button betätigt, werden alle free jobs der SQ/SO in einem separaten Formular angezeigt.

Da ein „on demand job“ an eine Komponente gelinkt sein muss, versucht das System beim Laden der free jobs bereits eine passende Komponente zu finden. Wird eine passende Komponente gefunden, so wird diese ebenfalls angezeigt (1):



Der Button „Select Component“ ist in diesem Fall disabled.

Wird hingegen keine passende Komponente gefunden, so wird der Button „Select Component“ enabled, und es wird keine neue Komponente im Grid angezeigt (1):



Danach werden über „Create on demand job(s)“ die ausgewählten Jobs erstellt und sind nach dem nächsten Datentransfer an Bord vorhanden.

### 24.2.5 Exchange Rate Updater (deu)

Der Exchange Rate Updater holt und speichert die aktuellen Exchange Rates von der Internetseite:

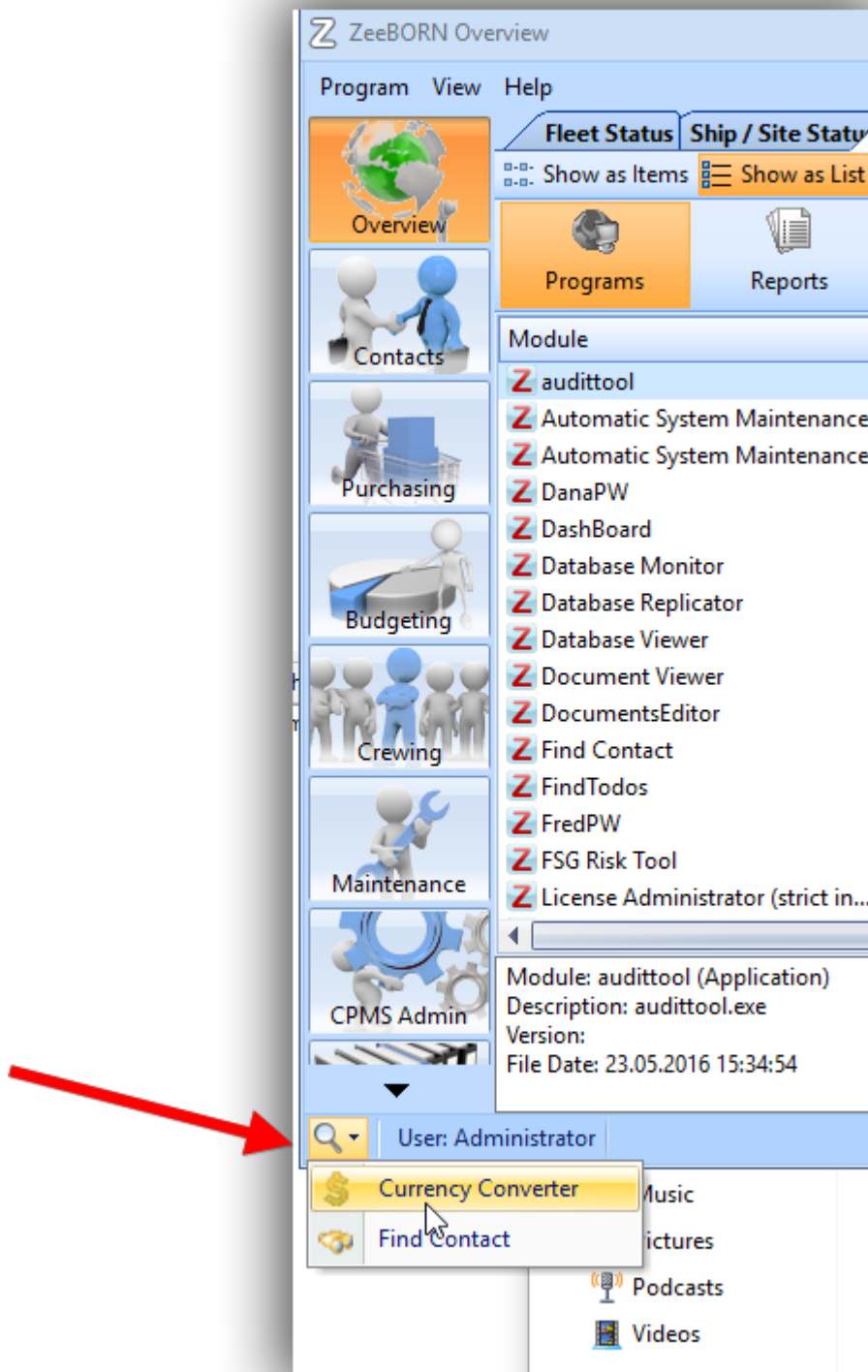
Gespeichert werden nur die Exchange Rates der Currencies, die im System als „Active“ gekennzeichnet sind.

#### **Start Exchange Rate Updater**

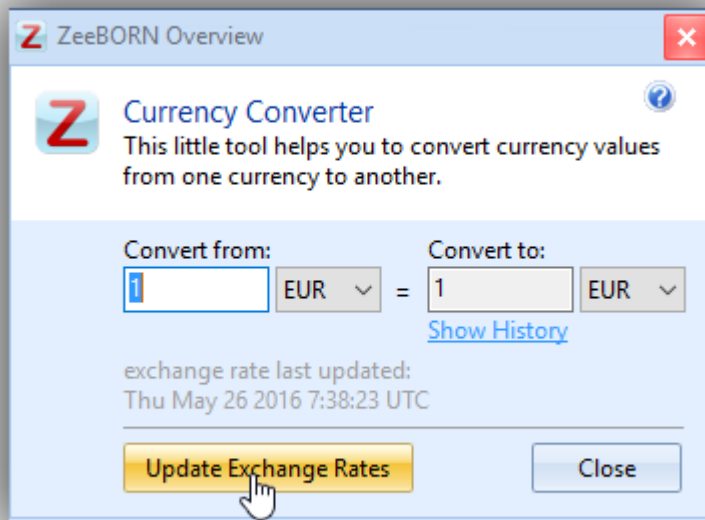
Um den Exchange Rate Updater zu starten, gibt es zwei Möglichkeiten:

#### **Currency Converter**

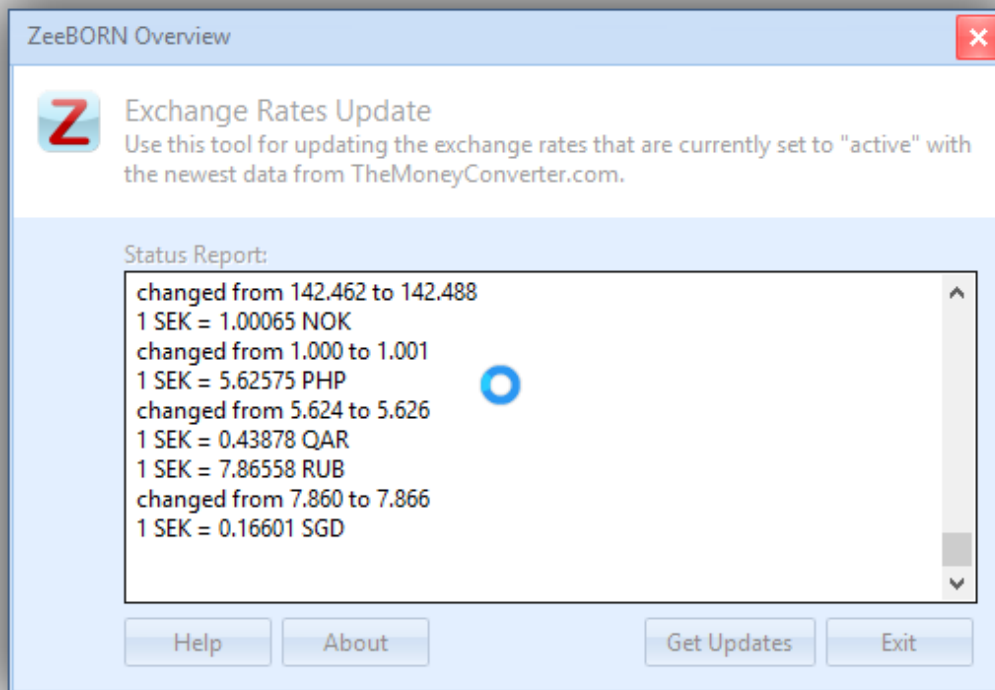
Den Currency Converter findet man im unteren Teil des ZeeBORN Systems.



Hier gibt es dann – mit der entsprechenden Berechtigung – den Button **Update Exchange Rates**



Mit Klick auf den Button werden die Exchange Rates aktualisiert. Die bisherigen Exchange Rates werden in die History geschrieben und verbleiben im System, so dass immer die zu einem bestimmten Zeitpunkt gültige Exchange Rate bestimmt werden kann.

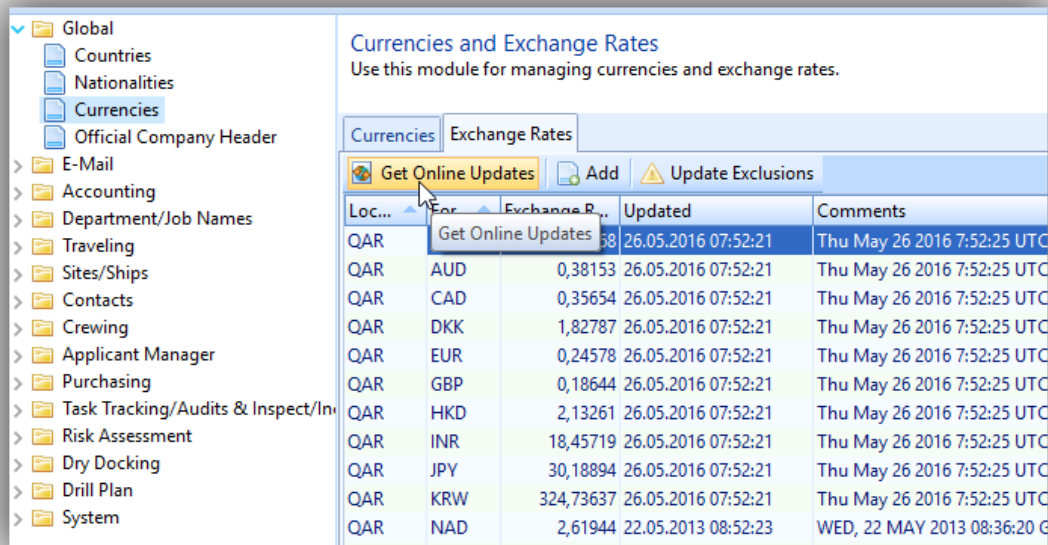


### Configuration

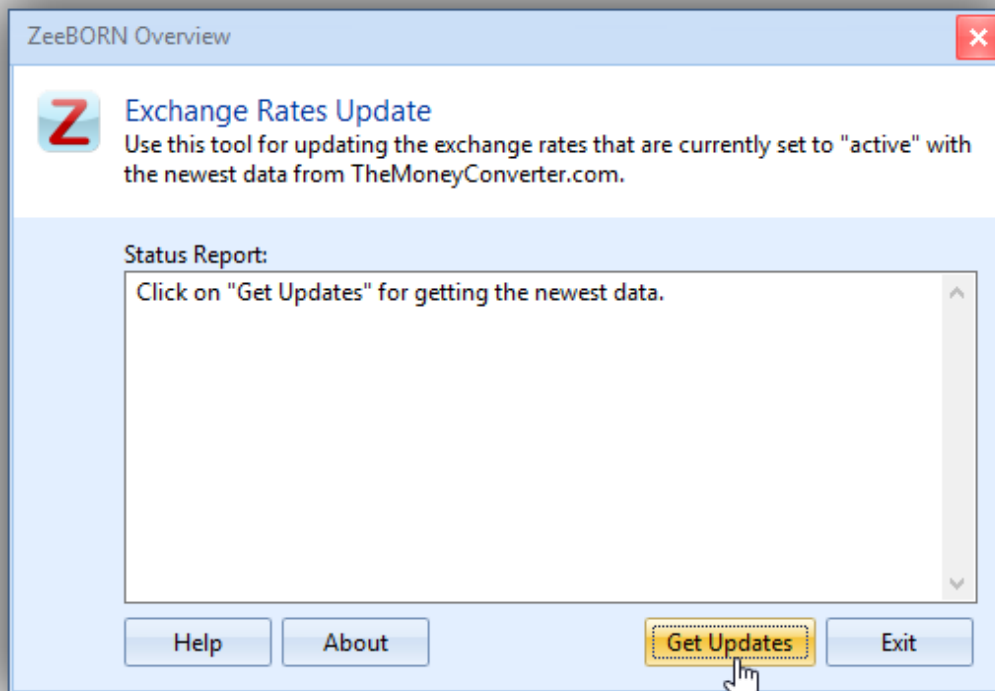
Wer über die entsprechende Berechtigung verfügt, kann den Updater auch über die Configuration starten.

Dazu **Global** -> **Currencies** wählen und auf den Tab Exchange Rates wechseln.





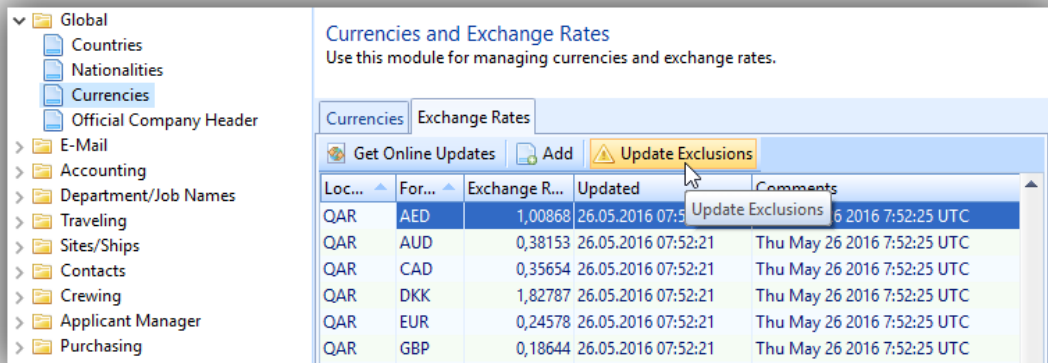
Dort findet man den Button **Get online Updates**.



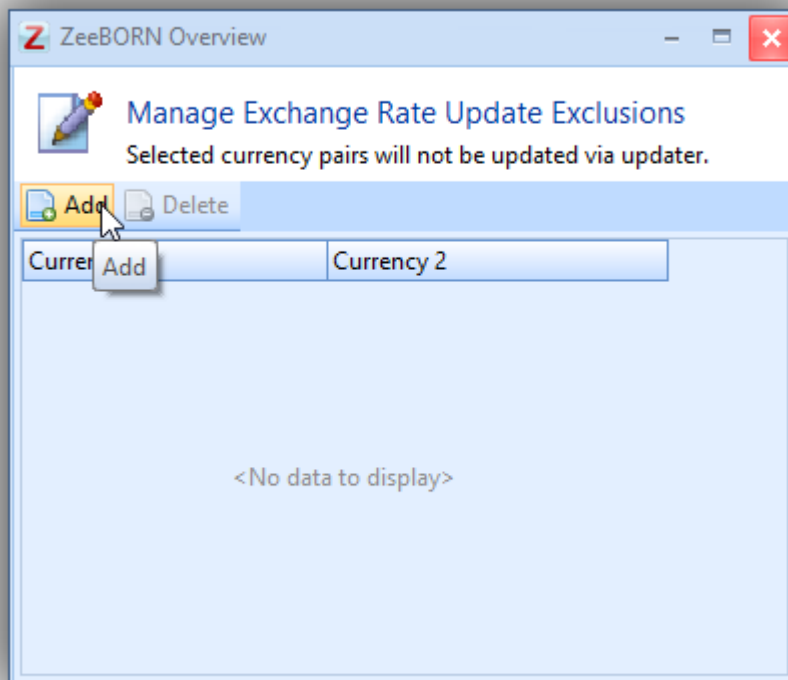
Mit Klick auf den Button **Get Updates** startet man den Update-Vorgang.

## Ausnahmen

Es kann notwendig sein, bestimmte Currency-Paarungen aus der Update Routine auszunehmen (z.B. wenn mit der Bank ein fixer Wechselkurs vereinbart wurde). Dazu muss man dem System mitteilen, welche Paarungen nicht geupdated werden sollen.



Nach Klick auf den Button **Update Exclusions** öffnet sich folgendes Formular:



Hier können die Ausnahmen verwaltet werden.

## 24.2.6 ZeeBORN Tasks (deu)

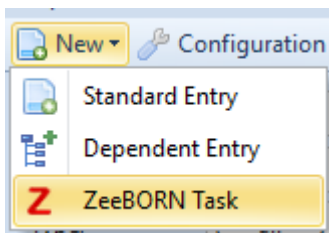
ZeeBORN Tasks können verwendet werden, um Fehler oder Änderungswünsche an das ZeeBORN Team zu reporten. Die entsprechenden Anfragen können direkt im System erfasst und das Follow-Up kann mitgespeichert werden.

Bitte beachten: eine aktive Lizenz für das Task Tracking Module ist notwendig, um diese Funktionalität einsetzen zu können.

### Hinzufügen einer neuen Aufgabe

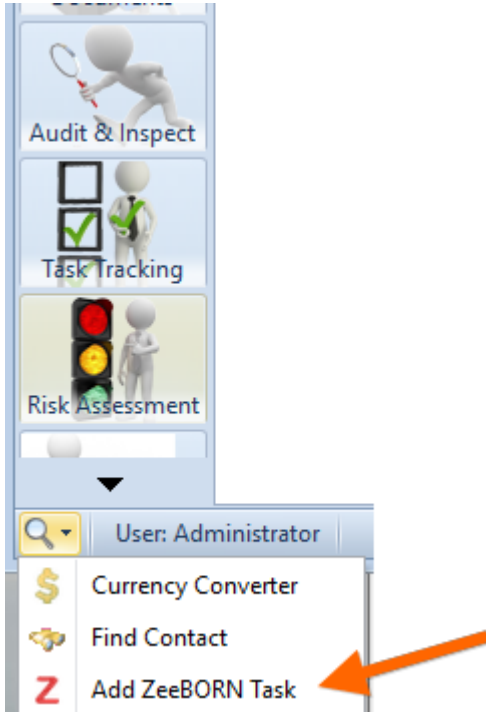
Eine ZeeBORN Task kann entweder

- direkt im Task Tracker über **New -> ZeeBORN Task**

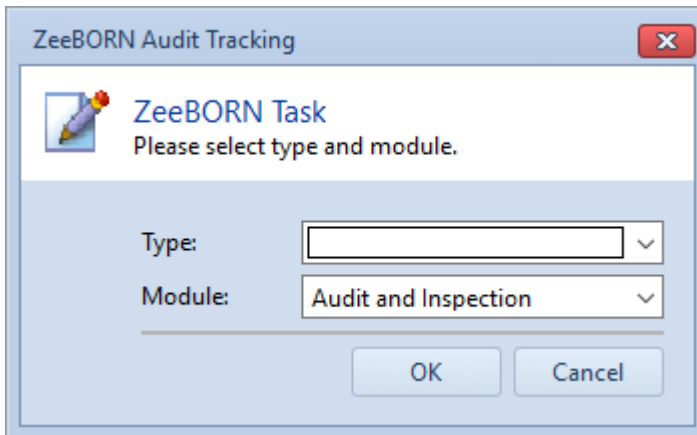


oder

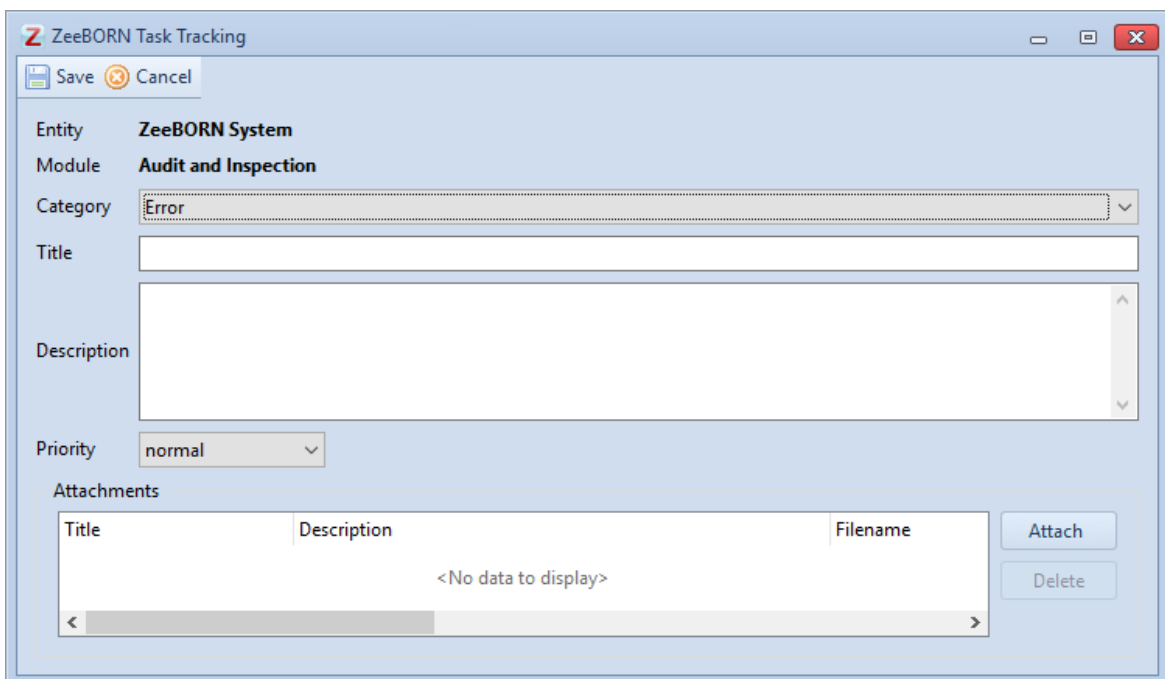
- links unten im System bei den kleinen Hilfstools angelegt werden.



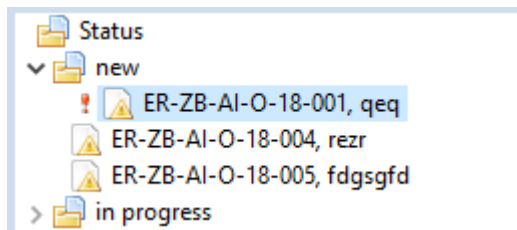
Wurde der Button geklickt, so muss man entscheiden, welchen Typ die Aufgabe haben soll (Error, Change Request) und – für den Fall, dass die Task direkt aus dem Task Tracker heraus geöffnet wird – um welches Modul es sich handelt (wird die Aufgabe aus dem Hilfebereich heraus gestartet, ist das gerade geöffnete Modul bereits vorausgewählt).



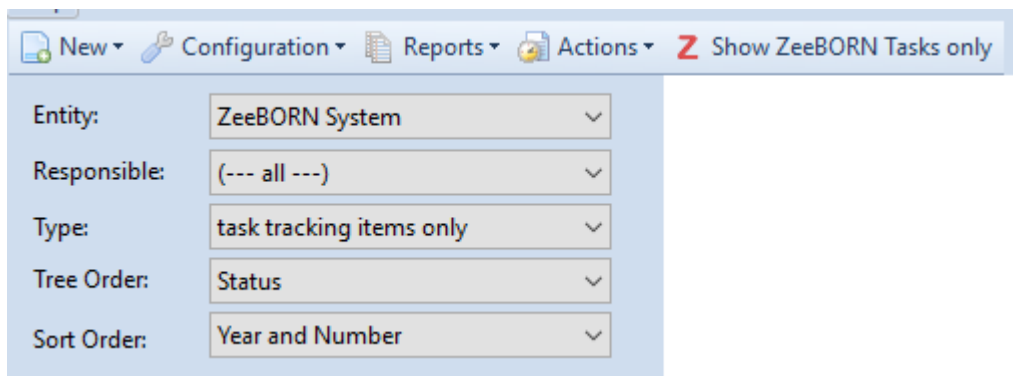
Im folgenden Formular können Titel und Description erfasst sowie eine Priorität zugewiesen werden.



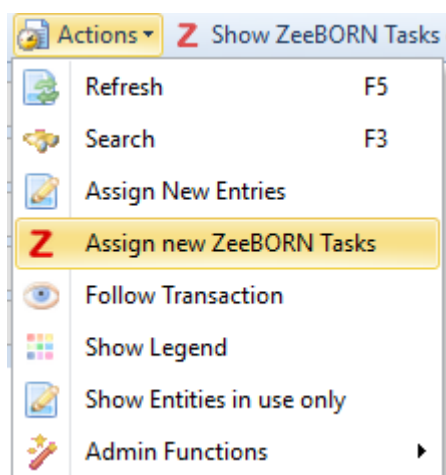
Wurde der Button geklickt, so muss man entscheiden, welchen Typ die Aufgabe haben soll (Error, Change Request) und – für den Fall, dass die Task direkt aus dem Task Tracker heraus geöffnet wird – um welches Modul es sich handelt (wird die Aufgabe aus dem Hilfebereich heraus gestartet, ist das gerade geöffnete Modul bereits vorausgewählt).

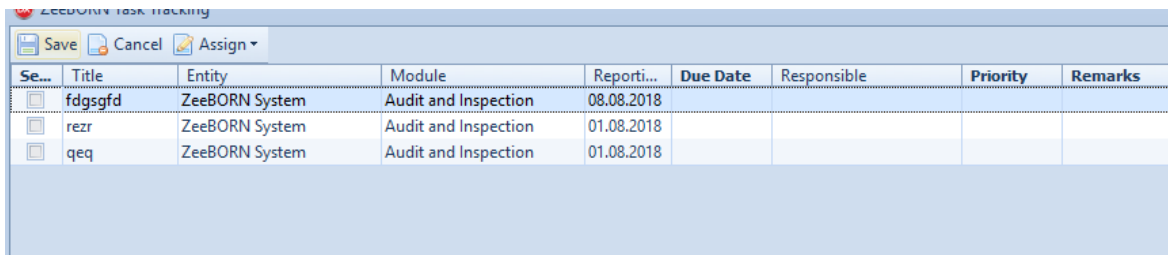


Wurde der Button geklickt, so muss man entscheiden, welchen Typ die Aufgabe haben soll (Error, Change Request) und – für den Fall, dass die Task direkt aus dem Task Tracker heraus geöffnet wird – um welches Modul es sich handelt (wird die Aufgabe aus dem Hilfebereich heraus gestartet, ist das gerade geöffnete Modul bereits vorausgewählt).



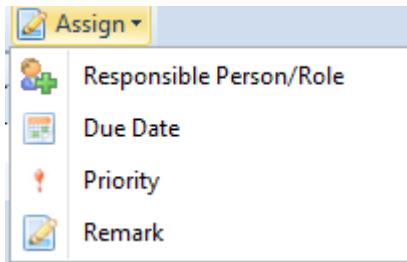
Die notwendigen Einstellungen für Entity, Type, und Sort Order werden vorgenommen. Dadurch werden nur Tasks angezeigt, die für ZeeBORN angelegt wurden. Es wurde jedoch noch nicht festgelegt, ob es sich wirklich um ZeeBORN Tasks handelt. Das geschieht im nächsten Schritt. Jemand, der in der Firma dafür verantwortlich ist festzulegen, ob eine Aufgabe wirklich an den ZeeBORN Support weitergeleitet werden soll, legt dies über **Actions** -> **Assign new ZeeBORN Tasks** zu:





Se...	Title	Entity	Module	Reporti...	Due Date	Responsible	Priority	Remarks
<input type="checkbox"/>	fdgsdfd	ZeeBORN System	Audit and Inspection	08.08.2018				
<input type="checkbox"/>	rezr	ZeeBORN System	Audit and Inspection	01.08.2018				
<input type="checkbox"/>	qeq	ZeeBORN System	Audit and Inspection	01.08.2018				

Hier können über **Assign** eine Responsible Person/Role, ein Due Date, eine andere Priority und ein Remark zu vorher selektierten Tasks zugewiesen werden.



Ist gewünscht, dass die Task An den ZeeBORN Support weitergeleitet wird, so muss als Responsible Person „ZeeBORN Support“ zugewiesen werden.

Die Tasks bekommen dann den Status „In Progress“.

Es kann auch einer einzelnen Aufgabe zugewiesen werden, wer die Responsible Person etc. ist. Dazu bei der Task den Button „Follow Up“ klicken und die entsprechenden Werte zuweisen:

ZeeBORN Task Tracking

Save Cancel

ER-ZB-AI-O-18-001

	Current Value:	New Value:
Responsible		
Person:		ZeeBORN Support
Role:	(not assigned)	
Status:	new	
Due Date:	<not assigned>	
Priority:	high	high
Follow Up Date:	14.08.2018	
Comments:		

Es wird grafisch dargestellt, dass eine Aufgabe ZeeBORN zugewiesen wurde:

<b>ZeeBORN Task</b>	not sent to ZeeBORN
<b>Number:</b>	ER-ZB-AI-O-18-005
<b>Status:</b>	<b>in progress</b>
<b>Category:</b>	Error
<b>Entity:</b>	ZeeBORN System

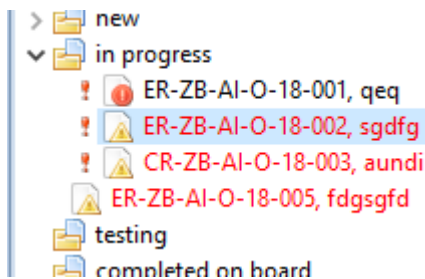
Per Tool werden dann die Tasks herausgefiltert, die ZeeBORN zugewiesen wurden und in unsere Datenbank übertragen. Nach der Übertragung sieht dann die Darstellung wie folgt aus:

<b>ZeeBORN Task</b>	Sent to ZeeBORN: 14.08.2018
<b>Number:</b>	ER-ZB-AI-O-18-005
<b>Status:</b>	<b>in progress</b>

## Handling von Tasks, die nicht an ZeeBORN gesendet werden sollen

Soll eine Task nicht an ZeeBORN gesendet werden, sondern inhouse bearbeitet werden, so kann man wie oben beschrieben vorgehen und die entsprechende Responsible Person eintragen.

Damit man unterscheiden kann, ob die Tasks inhouse oder von ZeeBORN bearbeitet werden, werden die an ZeeBORN zugewiesenen Tasks rot dargestellt:



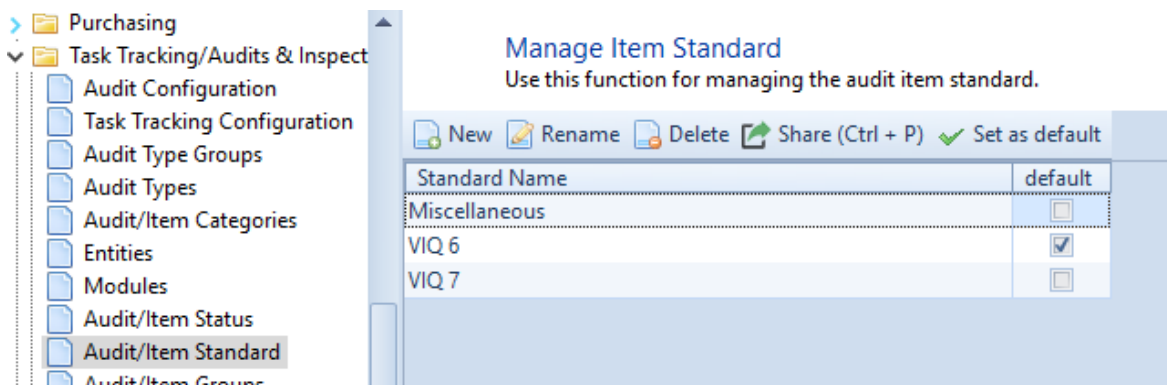
Soll eine Task rejected werden, wird ihr über Follow Up der Status „Rejected“ zugewiesen. Die Task wird danach im Folder rejected angezeigt (sie kann bei Bedarf über reopen wieder in einen bearbeitbaren Zustand versetzt werden).

## 24.2.7 VIQ Standards (deu)

Ab sofort ist es möglich, VIQ Standards zur Gruppierung von Item Groups/Numbers zu verwalten.

### Configuration

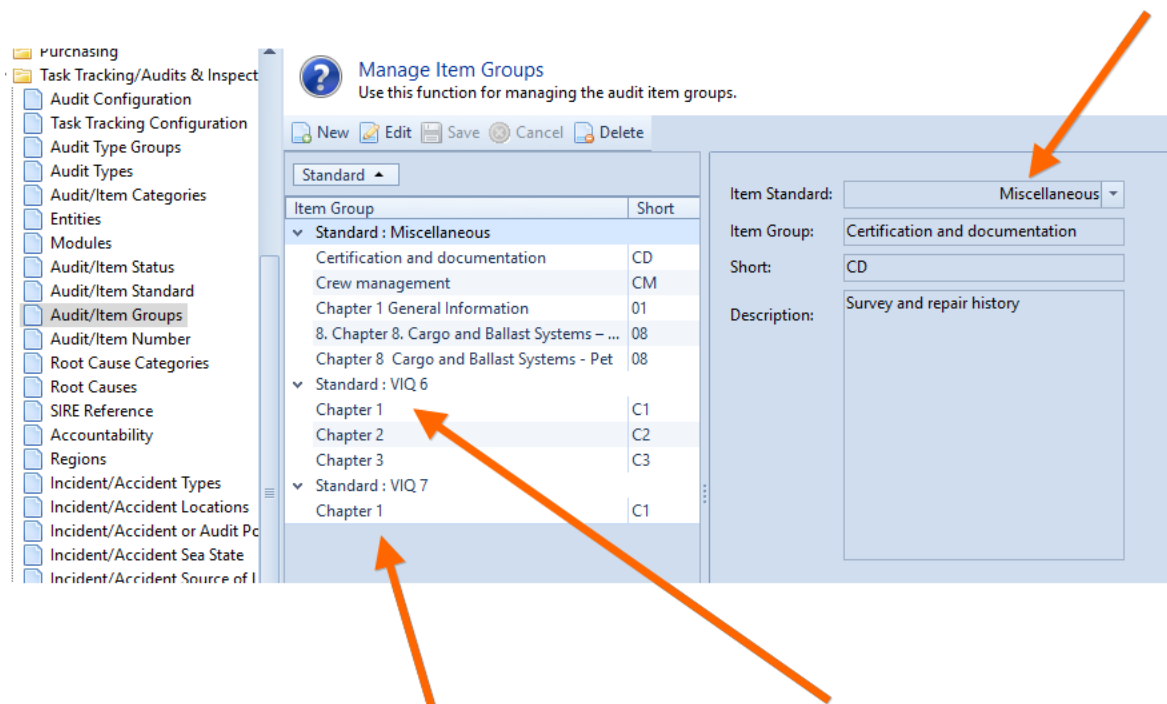
Dazu müssen in der Configuration die Standards verwaltet werden.



Der gerade aktuelle Standard wird auf default gesetzt und ist damit immer vorausgewählt.

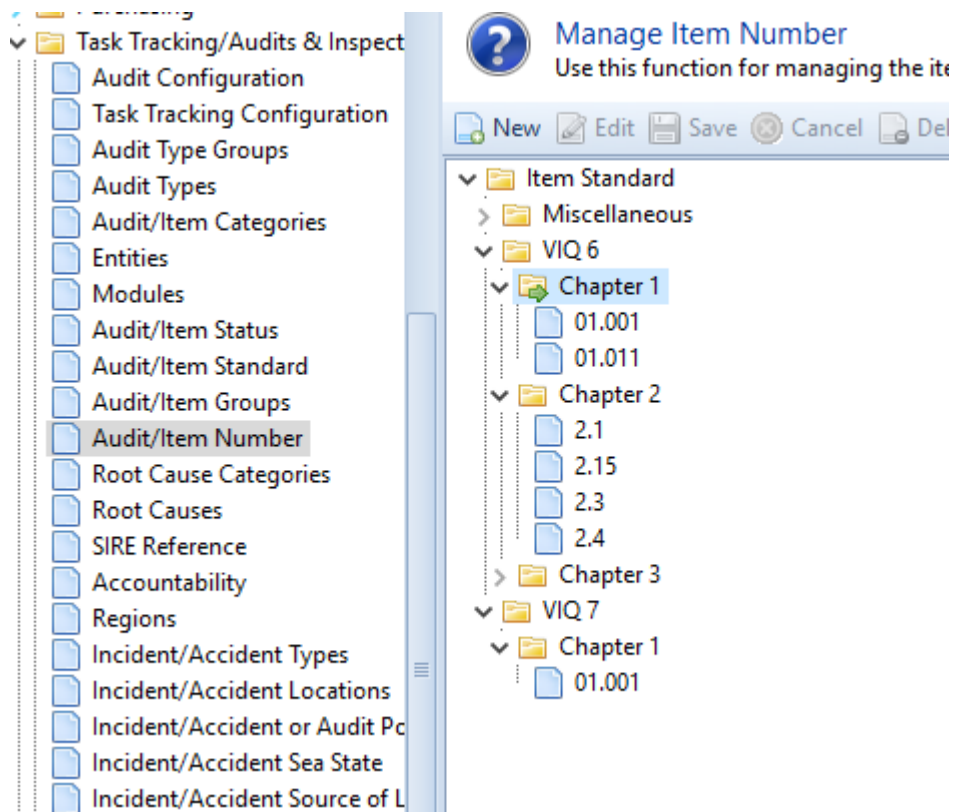


Bei den Item Groups muss nun hinterlegt werden, welche Item Group zu welchem Standard gehört.



Dabei kann es Item Groups mit dem gleichen Namen jeweils pro Standard geben.

Die Ansicht der Item Numbers wurde ebenfalls um den Standard erweitert.



### Audit Types

Bei den Audit Types muss hinterlegt werden, welche Item Groups für den Type gültig sind. Hier müssen jetzt die Groups pro Standard gewählt werden:

The screenshot shows a software interface for configuring audits. On the left, a list of audit types is displayed, with 'External Audit' selected. The right pane, titled 'Details', contains the following fields and options:

- Name: External Audit
- Group: External Audits
- Short: EA
- Days till next inspection: 900
- Days before (Time Frame): 0
- Days after (Time Frame): 0
- exclude from next audit planning
- show item numbers (if item groups are assigned)  mandatory
- set as inactive
- show regions

Below these options are three tabs: 'Item Categories', 'Item Groups', and 'Sites for Distributing'. The 'Item Groups' tab is active, showing a table with the following data:

Select	Item Group	Description
Standard : VIQ 6		
<input checked="" type="checkbox"/>	Chapter 1	
<input checked="" type="checkbox"/>	Chapter 2	
<input checked="" type="checkbox"/>	Chapter 3	
Standard : VIQ 7		
<input checked="" type="checkbox"/>	Chapter 1	

### Erfassen eines Audits

Wird nun ein neues Audit erfasst, muss festgelegt werden, welcher Standard verwendet werden soll.

**ZeeBORN Audit Tracking**

**Select Site and Inspection Type**  
Use this tool for selecting site and inspection type.

Site:

Type:

Standard: VIQ 6

OK Cancel

Auch beim Import eines SIRE wird der Standard abgefragt:

**ZeeBORN Audit Tracking**

**Standard**  
Please select standard for item groups.

Standard: VIQ 6

OK Cancel

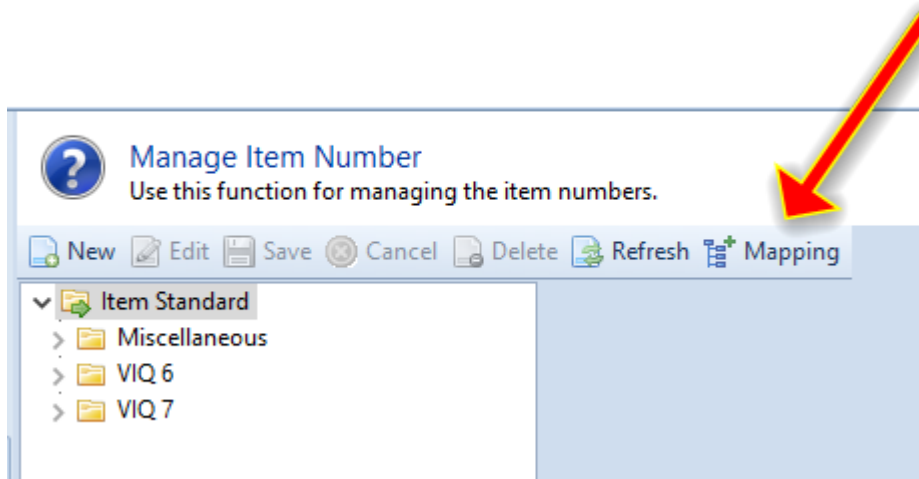
Es werden dann nur Item Groups zur Auswahl angezeigt, die dem Type und dem Standard zugewiesen wurden.

Der verwendete Standard wird dann beim Audit und bei den Items angezeigt:

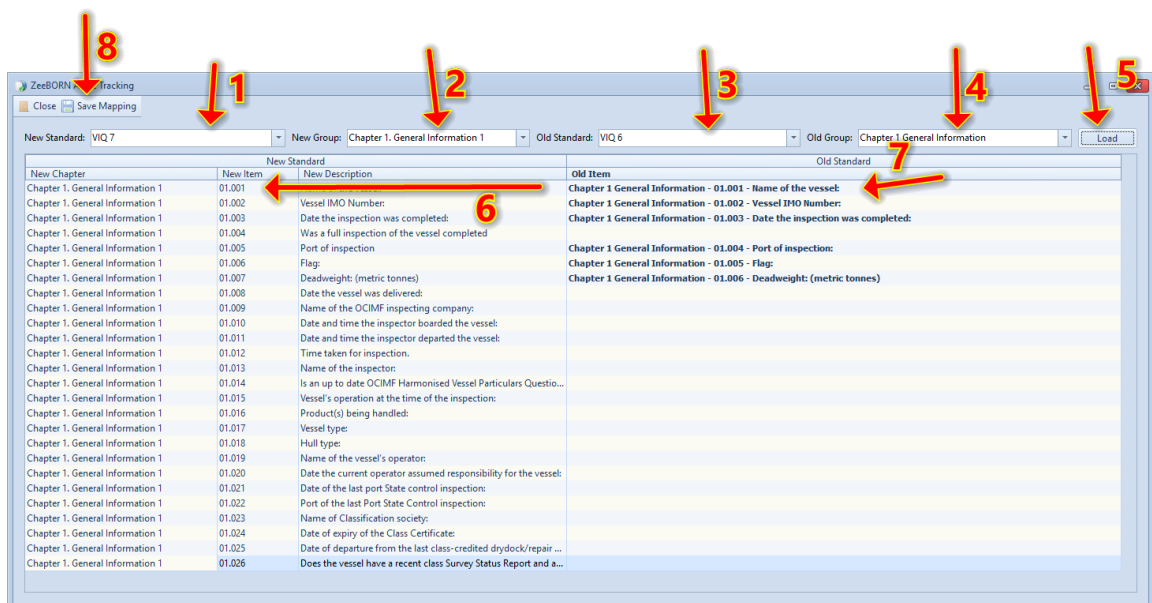
General Data					
Port/Location:	rtzt				
Inspection Date:	14.08.2018				
Standard:	VIQ 7				
Deficiencies					
Distribute	Due Date	Status	Responsible	Type	Numl
	13.09.2018	new		ToDo	<a href="#">TD-G</a>

## Verlinkung der Item Numbers zwischen den Standards

Da sich die Item Numbers teilweise stark verschoben haben, ist es für Statistiken und Auswertungen notwendig (wenn gewünscht), die einzelnen Item Numbers mit ihrem alten Pendant aus dem alten Standard zu verlinken.



Dazu in der Configuration den Bereich „Manage Item Number“ auswählen. Dort den Button „Mapping“ anklicken.



Hier dann

1. Den neuen Standard auswählen
2. Die zu bearbeitende Gruppe aus dem neuen Standard auswählen
3. Den alten Standard auswählen

4. Die Gruppe aus dem alten Standard auswählen, aus der man die Item Numbers verlinken will
5. Laden
6. einer neuen Item Number
7. Eine alte Item Number zuweisen
8. Zum Abschluss abspeichern. Danach mit der nächsten Gruppe fortfahren

### **Report Item Numbers**

Im Report Item Number wird geschaut, ob es Verlinkungen im angegebene Zeitraum gibt. Die ItemNumbers werden dann zusammengezählt.

In der Darstellung werden die Item Numbers, die verlinkt sind, dann untereinander dargestellt (der zweite kursiv) – der jeweilige Standard wird vorne angestellt

ZeeBORN Audit Tracking

Share Close

**TOP 10 most frequent deficiencies**

**Report Details**

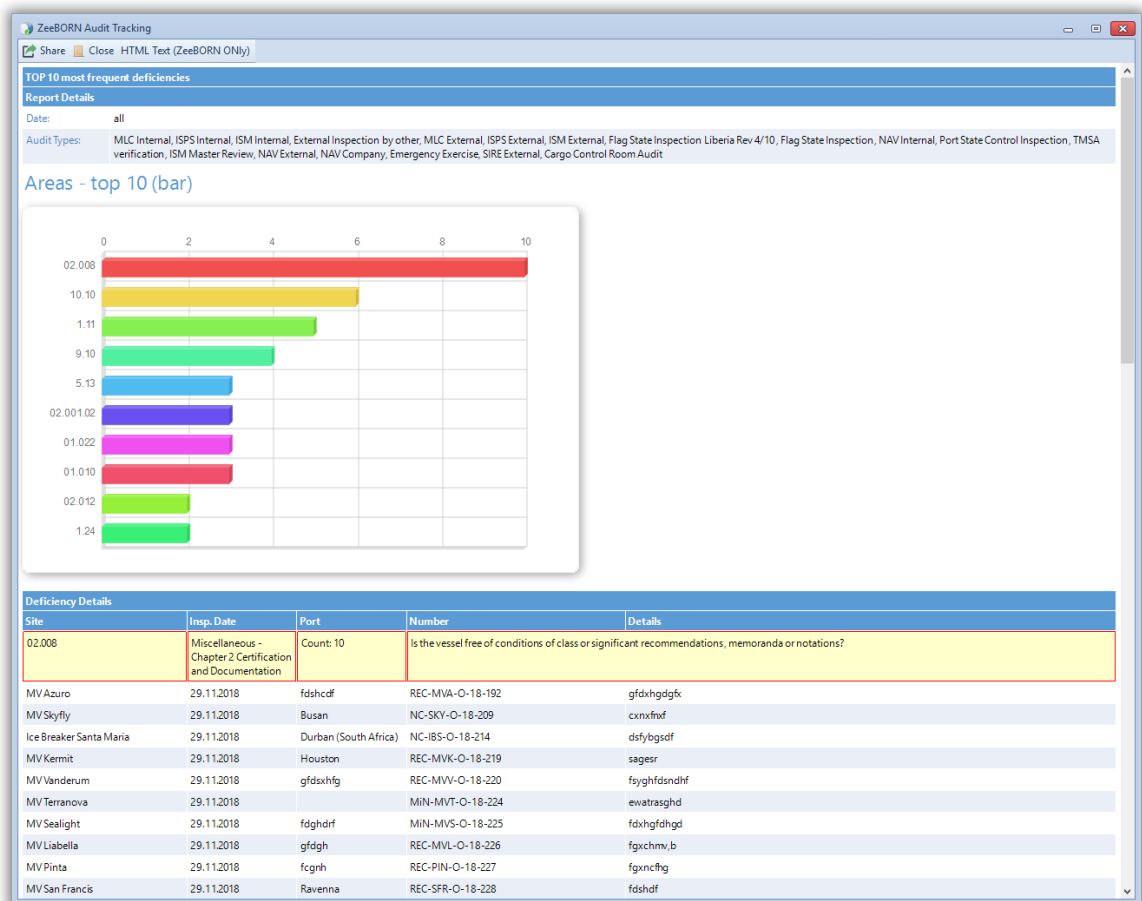
Date: all

Audit Types: MLC Internal, ISPS Internal, ISM Internal, External Inspection by other, MLC External, ISPS External, ISM External, Flag State Inspection Liberia Rev 4/10, Flag State Inspection, NAV Internal, Port State Control Inspection, TMSA verification, ISM Master Review, NAV External, NAV Company, Emergency Exercise, SIRE External, Cargo Control Room Audit

**Deficiency Details**

Site	Insp. Date	Port	Number	Details
02.008	Miscellaneous - Chapter 2 Certification and Documentation	Count: 10	Is the vessel free of conditions of class or significant recommendations, memoranda or notations?	
MVAzuro	29.11.2018	fdshcdf	REC-MVA-O-18-192	gfdxhgdgdx
MV Skyfly	29.11.2018	Busan	NC-SKY-O-18-209	cxnxfndf
Ice Breaker Santa Maria	29.11.2018	Durban (South Africa)	NC-IBS-O-18-214	dsfybgdsf
MV Kermit	29.11.2018	Houston	REC-MVK-O-18-219	sagesr
MV Vanderum	29.11.2018	gfdshfg	REC-MVV-O-18-220	fsyghfndhf
MV Terranova	29.11.2018		MiN-MVT-O-18-224	ewatrasghd
MV Sealight	29.11.2018	fdghdrf	MiN-MVS-O-18-225	fdxhghdhd
MV Liabella	29.11.2018	gfdgh	REC-MVL-O-18-226	fgxchmw,b
MV Pinta	29.11.2018	fcgnh	REC-PIN-O-18-227	fgxncfng
MV San Francis	29.11.2018	Ravenna	REC-SFR-O-18-228	fdshdf
10.10	VIQ7 - Chapter 10. Engine and Steering Compartments	Count: 6	Are the engineers aware of the requirements and precautions necessary to control the change from residual to low-sulphur fuels and are these requirements posted?	
MV Stella Maris	21.11.2018	Durban (South Africa)	DEF-MSM-O-18-200	esztesw
MV Skyfly	22.11.2018	xy	DEF-SKY-O-18-198	ssdhfgh
MV Starlet	29.11.2018	sagfdsg	REC-MST-O-18-204	reghtrsdhnr
MV Elegance	29.11.2018	Montreal	MiN-MVE-O-18-217	gdfshfdhd
MV Pearldiver	29.11.2018	Monrovia	MiN-MVP-O-18-222	cvdyxbsdxbf
MV Chrystal	29.11.2018	fdsafg	MiN-MVC-O-18-223	wasgfsetdrft
1.11 01.010	VIQ7 - Chapter 1. General Information Miscellaneous - Chapter 1 General Information	Count: 5	Date and time the inspector departed the vessel: Date and time the inspector departed the vessel:	
MV Stella Maris	21.11.2018	Durban (South Africa)	DEF-MSM-O-18-202	fdshgfdh
MV Skyfly	22.11.2018	xy	DEF-SKY-O-18-189	vxyghrftc
MV Starlet	29.11.2018	sagfdsg	REC-MST-O-18-203	ysgbdsfg
MV Elegance	29.11.2018	Montreal	REC-MVE-O-18-216	asfdahhy

Des Weiteren gibt es den Report ab sofort auch mit einem enthaltenen Chart:  
Reports -> Most Frequent (Top 10) – with Chart:

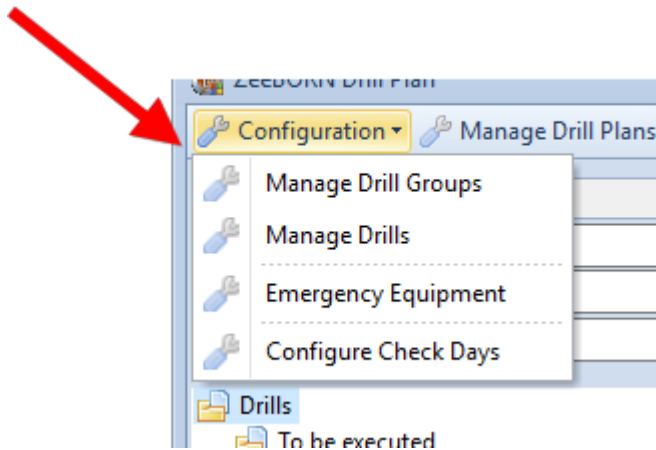


## 24.2.8 Drill Plan Standalone Version (deu)

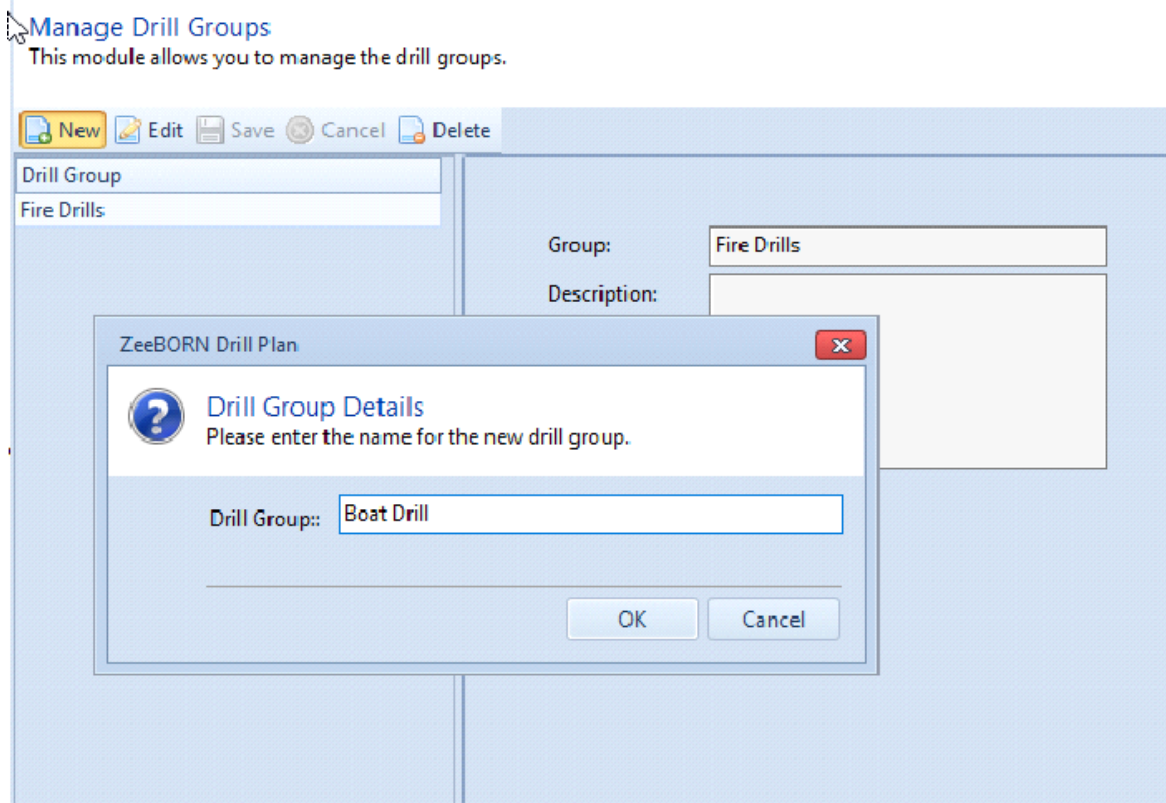
### Configuration

Um das System zu verwenden, müssen zunächst einige Konfigurationen vorgenommen werden. Den Konfigurationsbereich erreicht man – mit der entsprechenden Berechtigung – über den Button **Configuration**.





### Manage Drill Groups

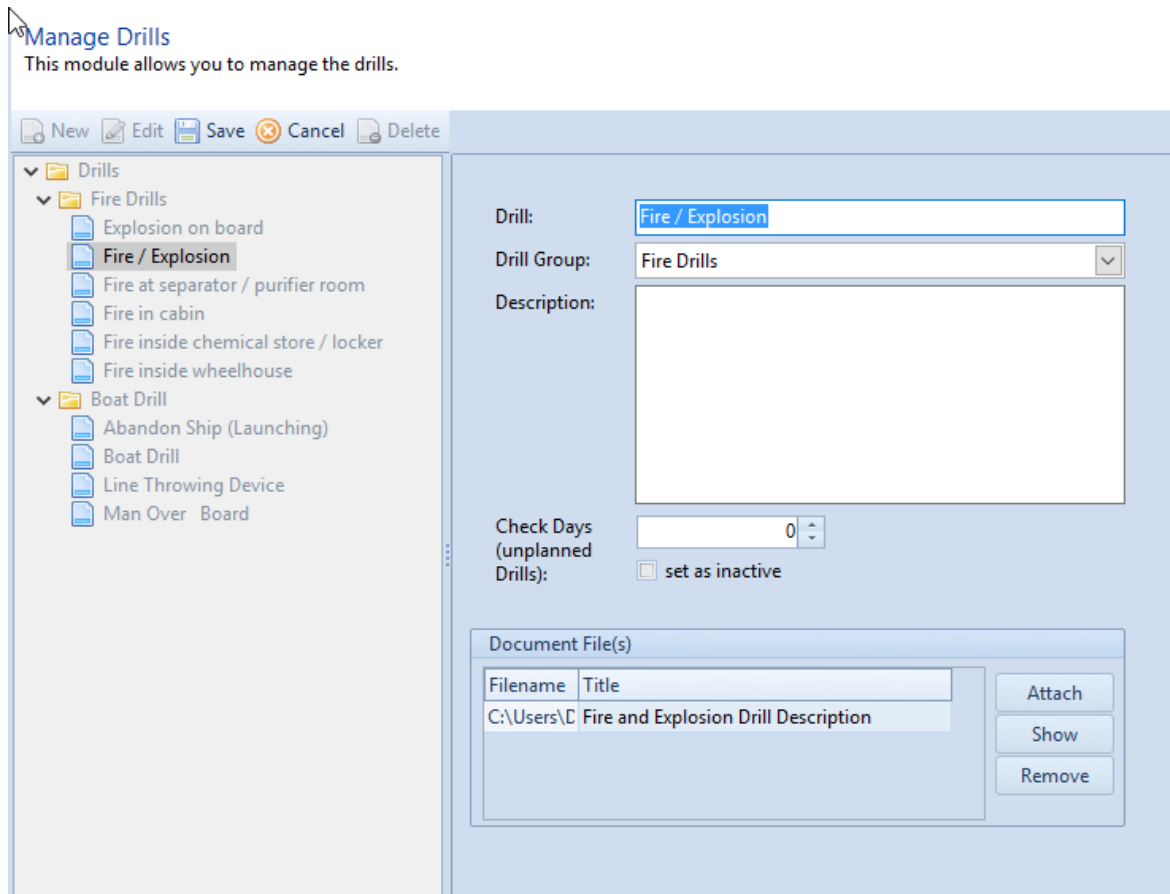


Nach Klick auf **New** den Namen der Drill Gruppe erfassen und eventuell eine Description hinzufügen. Danach mit **Save** bestätigen.

Bemerkung: Es können nur Drill Groups gelöscht werden, die nicht im System in Verwendung sind.

### Manage Drills

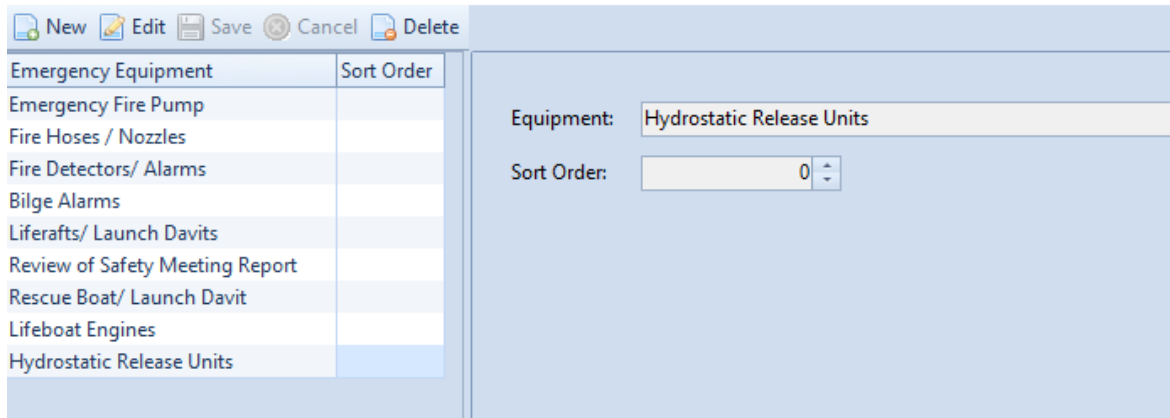
Im nächsten Schritt werden die Drills erfasst, die im System verwaltet werden sollen.



Drill	Name des Drills
Drill Group	Zuweisung einer der vorher angelegten Drill Groups
Description	Beschreibung
Check Days (unplanned Drills)	Wird ein ungeplanter Drill erfasst, so prüft das System, ob es in dem Zeitraum +- CheckDays einen geplanten Drill gibt – dieser wird dann angeboten.
Document File(s)	Attachments pro Drill

### Emergency Equipment

Verwaltung des Emergency Equipments, dessen Anwendung in den Drills trainiert werden soll.



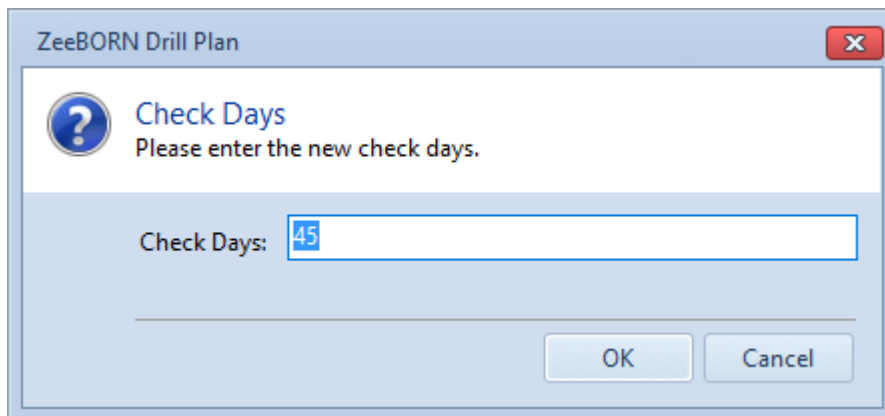
Sort Order wird genutzt, um eine andere Sortierung zu erreichen.

### Configure Check Days

Hier werden die Check Tage für Drills festgelegt. Im Baum werden die Drills, die zu absolvieren sind, in 3 Unterfoldern angezeigt:

- Previous
- Actual
- Next

Die Einsortierung in diese Folder geschieht in Abhängigkeit von den CheckDays.



### Manage Drill Plans

Im nächsten Schritt wird der Jahresplan festgelegt, d.h. welche Drills sollen wann im Jahr absolviert werden. Der Drill Plan Bereich ist über **Manage Drill Plans** zu erreichen.

Mit **New Drill Plan** beginnen und ein Jahr auswählen.

ZeeBORN Drill Plan

**Manage Drill Plans**  
Please enter select site and execution year.

Site: A+R 6483 (Titan)

Year: 2016

OK Cancel

Eine Warnung erscheint, wenn für dieses Jahr bereits ein Drill Plan angelegt wurde.

ZeeBORN Drill Plan

**Information**  
A drill plan for this year and site already exists.

OK

Danach wird zugewiesen, in welcher Woche des Monats und in welchen Monaten der jeweilige Drill durchgeführt werden soll.

ZeeBORN Drill Plan

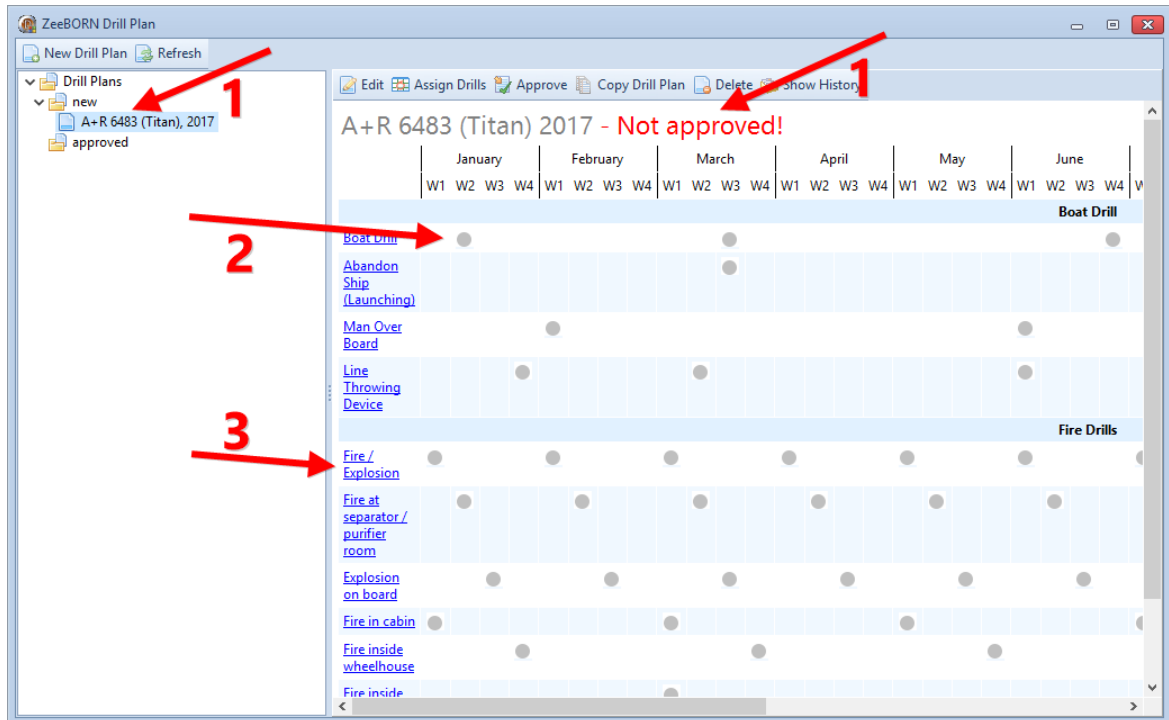
Save Cancel Legend

Drill Group: General

Drill	January				February				March				April				May				June				July				August				September				October				November				December							
	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4	1	2	3	4				
Drill Group: Fire Drills																																																				
Fire / Explosion	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Fire at separator / purifier room	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Explosion on board	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Fire in cabin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Fire inside wheelhouse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Fire inside chemical store / locker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Drill Group: Boat Drill																																																				
Boat Drill	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Abandon Ship (Launching)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Man Over Board	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Line Throwing Device	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

Mit **Save** bestätigen.

Der generierte Plan ist dann im Baum sichtbar.

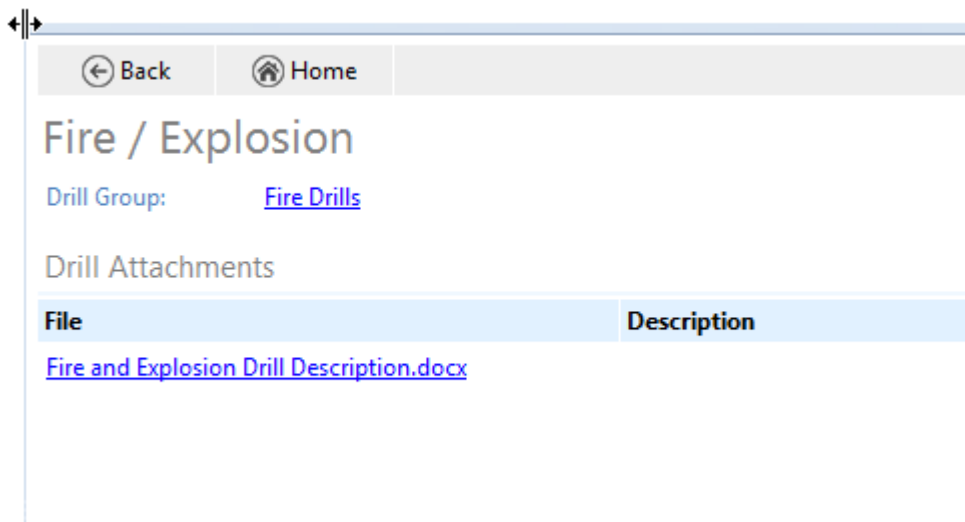


Er ist noch nicht bestätigt und kann noch weiter bearbeitet werden (1).

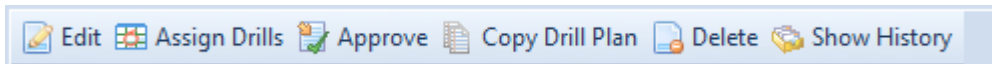
Alle zugewiesenen Drills sind grau markiert (2), da sie noch nicht reported wurden. Werden Drills im Drill Plan rot angezeigt, bedeutet dies, dass sie überfällig sind.

Das Reporten von Drills geht zu diesem Zeitpunkt auch noch nicht, da der Plan noch nicht bestätigt wurde. Das bedeutet auch, dass man den Drill Plan für das nächste Jahr rechtzeitig erstellen kann – erst, wenn er bestätigt wird, werden die entsprechenden Drills im System als zu reporten angezeigt.

Mit Klick auf einen Drill Namen (2) erhält man weiterführende Informationen pro Drill, die in der Konfiguration hinterlegt wurden (unter anderem zugewiesene Attachments).



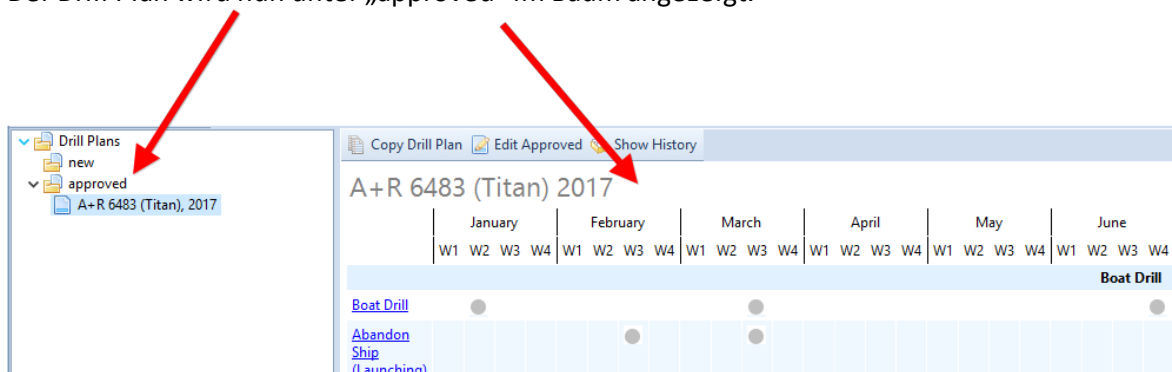
Solange der Drill Plan nicht approved wurde, kann er weiterhin bearbeitet werden:



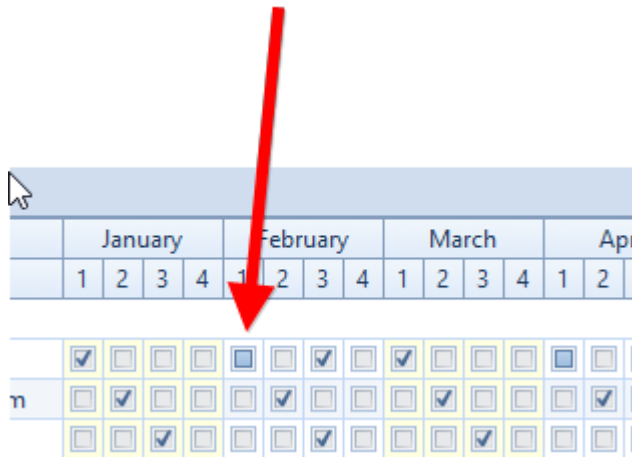
Edit	Das Jahr des Drill Plans kann geändert werden
Assign Drills	Die Zuweisung der Drills kann angepasst werden.
Approve	Approven des Drill Plans. Danach ist er im System vorhanden, die Drills können reported werden.
Copy Drill Plan	Copy Drill Plan auf ein anderes Jahr.
Delete	Der Drill Plan kann gelöscht werden, solange er nicht approved wurde.
Show History	Anzeige der History des Drill Plans.

Nach allen Zuweisungen wird mit **Approve** der Prozess der Anlegens des Drill Plans abgeschlossen.

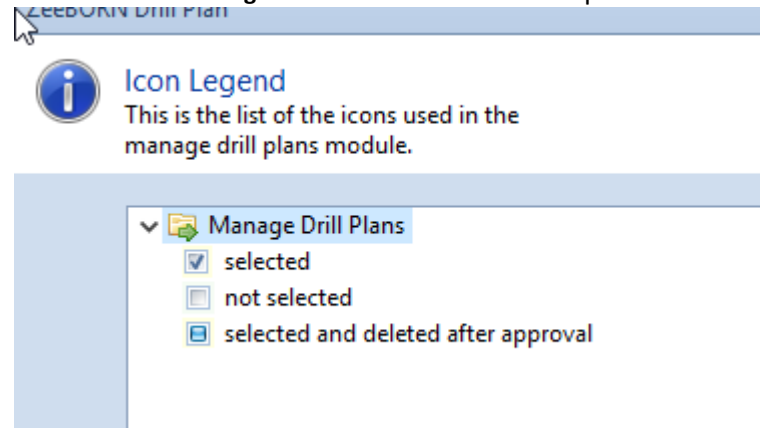
Der Drill Plan wird nun unter „approved“ im Baum angezeigt.



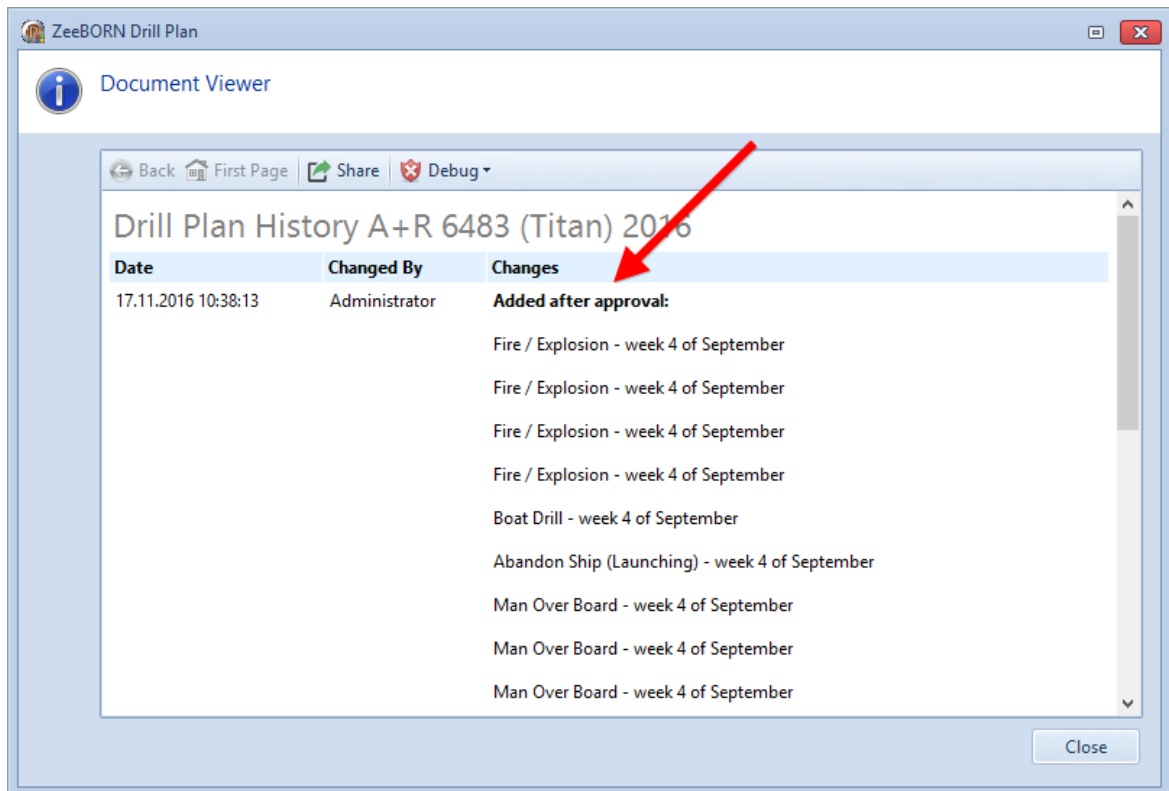
Im approved Bereich gibt es einen Button **Edit approved**. Hier kann man im Notfall einen bereits approven Plan editieren. Zu beachten ist hierbei: Wird ein Drill aus dem Drill Plan gelöscht, so wird das Kästchen anders markiert, so dass man auch später nachvollziehen kann, dass dort einmal ein Drill geplant war.



Über den Button **Legend** kann man sich die entsprechenden Icons anzeigen lassen:



In der History werden Änderungen nach dem Approval gesondert angezeigt:



The screenshot shows a web application window titled "ZeeBORN Drill Plan" with a "Document Viewer" sub-window. The main content area displays "Drill Plan History A+R 6483 (Titan) 2016". A table with three columns is shown: "Date", "Changed By", and "Changes". A red arrow points to the "Changes" column header. The table contains one row of data for the date 17.11.2016 10:38:13, changed by Administrator, with a list of changes including "Added after approval:", "Fire / Explosion - week 4 of September", "Boat Drill - week 4 of September", and "Abandon Ship (Launching) - week 4 of September".

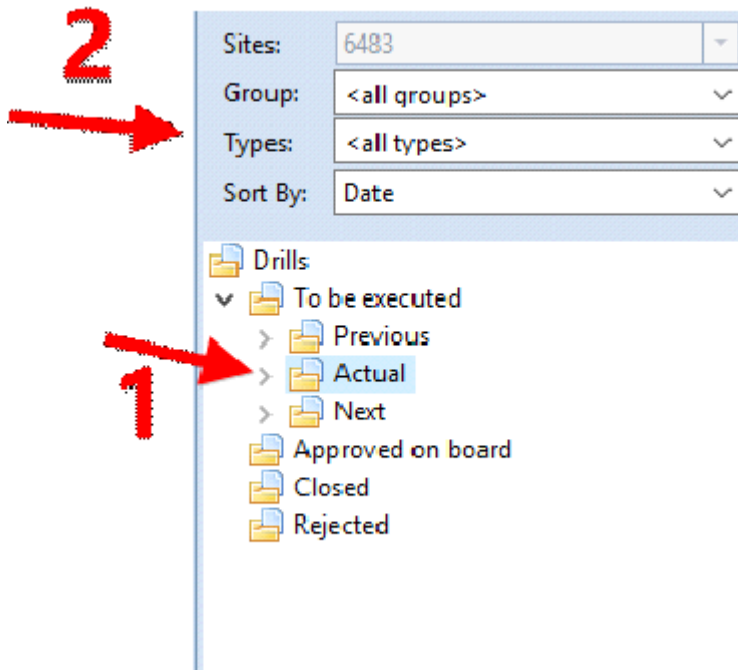
Date	Changed By	Changes
17.11.2016 10:38:13	Administrator	<b>Added after approval:</b> Fire / Explosion - week 4 of September Fire / Explosion - week 4 of September Fire / Explosion - week 4 of September Fire / Explosion - week 4 of September Boat Drill - week 4 of September Abandon Ship (Launching) - week 4 of September Man Over Board - week 4 of September Man Over Board - week 4 of September Man Over Board - week 4 of September

## Drill Reports

---

### General





Nach dem Approved des entsprechenden Drill Planes sind die Drills im Hauptformular sichtbar.

Sie werden – je nach Fälligkeit und den zugewiesenen Check Days – in die Folder previous, actual und next aufgeteilt (1).

Der Baum kann noch weiter spezialisiert werden (2):

Über **Group** kann man sich nur die Drills anzeigen lassen, die einer bestimmten Drill Group zugewiesen sind.

Über **Type** kann man sich einen speziellen Drill anzeigen lassen.

Über **Sort By** kann man sich den Baum nach Date oder Gruppe und Drill Type oder Drill Type sortieren lassen.

### **Report Drill**

Um einen Drill zu reporten, muss man den entsprechenden Drill im Baum auswählen und **Report planned drill** wählen.

ZeeBORN Drill Plan

Save Cancel Show Drill Details

Details Emergency Equipment Condition Attachments

**Drill:**

Execution Date: 17.11.2016 Duration from: to:

**Passenger / Crew Roll Call**

Completed Number Present: 0 Number Absent: 0

Name, Rank and Reason for Absentees:

**Drill Details**

Completed Satisfactorily Deficiencies:

followed by CBT Training Title:

include Demonstration in Use of Safety Equipment Equipment:

Additional Information:

Description of De-briefing:

Die entsprechenden Werte eintragen. Bitte beachten: wird bei **Number absent** eine Zahl größer als Null eingetragen, muss ein Eintrag im Feld **Name, Rank and Reason for Absentees** eingetragen werden.

Im nächsten Tab wird das Equipment markiert, mit dem geübt wurde.

Equipment	G	R	D	Remarks
Emergency Fire Pump	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fire Hoses / Nozzles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fire Detectors/ Alarms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Bilge Alarms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Liferafts/ Launch Davits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Review of Safety Meeting Report	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Rescue Boat/ Launch Davit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Lifeboat Engines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hydrostatic Release Units	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Hierbei steht

**G** für Good

**R** für Requires Attention

**D** für Details attached

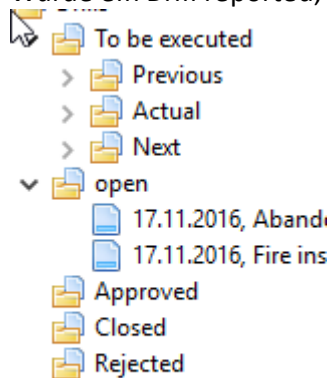
Wird für ein Equipment **D** oder **R** angeklickt, so ist eine Beschreibung im entsprechenden „Remarks“ Feld notwendig (wird beim Approven abgeprüft).

Des Weiteren sind die Felder **Additional Information** sowie **Description of de-briefing** Pflichtfelder. (wird ebenfalls beim Approven abgeprüft).

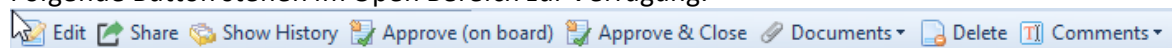
Im nächsten Tab können Attachments erfasst werden.

## Open Reports

Wurde ein Drill reported, wird er im Baum unter dem Folder **open** angezeigt.



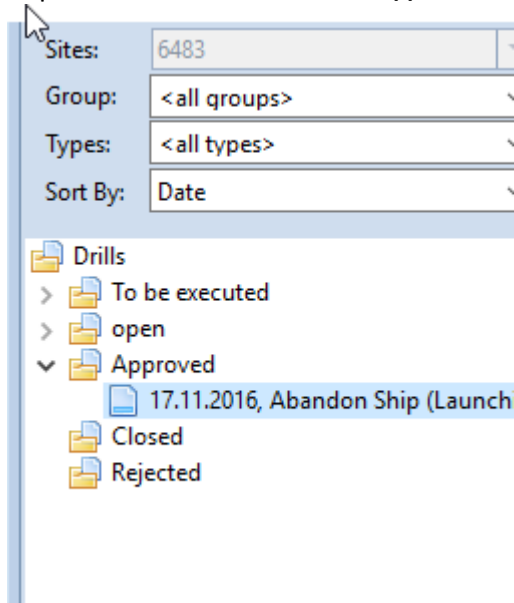
Folgende Button stehen im Open Bereich zur Verfügung:



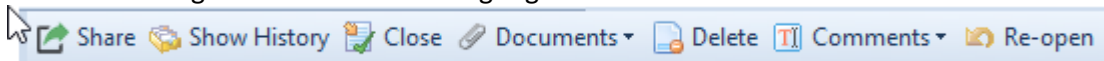
Edit	Erneutes Bearbeiten des Reports möglich.
Share	Die HTML Ansicht des Reports (rechte Seite) kann exportiert oder gedruckt werden.
Show History	Die History des Reports wird angezeigt.
Approve (on board)	Approven des Reports, keine Bearbeitung mehr möglich. Ein Approval Remark ist mandatory.
Approve & Close	Wer die Berechtigung hat, einen Report zu schließen, kann auch bereits einen open Report in einem Schritt approve and close.
Documents	Hinzufügen, Ansehen oder Löschen von Attachments.
Delete	Löschen des Reports.
Comments	Erfassen oder Anzeigen von Kommentaren.

### Approved Reports

Nachdem ein Report approved wurde, ist keine weitere Bearbeitung mehr möglich. Der Report wird unter dem Folder **approved** angezeigt.



Hier stehen folgende Button zur Verfügung:

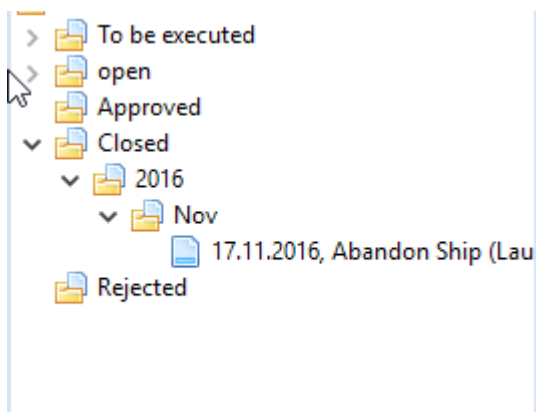


Share	Die HTML Ansicht des Reports (rechte Seite) kann exportiert oder gedruckt werden.
-------	---

Show History	Die History des Reports wird angezeigt.
Close	Der Report wird endgültig geschlossen. Eine Begründung wird verlangt.
Documents	Hinzufügen, Ansehen oder Löschen von Attachments.
Delete	Löschen des Reports.
Comments	Erfassen oder Anzeigen von Kommentaren.
Re-open	<p>Der Report kann zum erneuten Bearbeiten wieder geöffnet werden. Eine Begründung wird verlangt und nach dem Re-Opening im Report angezeigt.</p> <p>Execution:</p> <p><b>Report Details</b></p> <p>Additional: <b>reopened</b></p> <p>Reopen Reason: <b>reopen reason</b></p> <p>Execution Date: 17.11.2016</p> <p>Duration: 05:00:00 to 09:00:00</p> <p>Der Report wird wieder im Folder „Open“ angezeigt.</p>







### Closed Reports

Nach dem Schließen eines Reports erscheint dieser unter dem Folder **closed**. Der Closed Bereich ist nach Jahr und Monat sortiert.



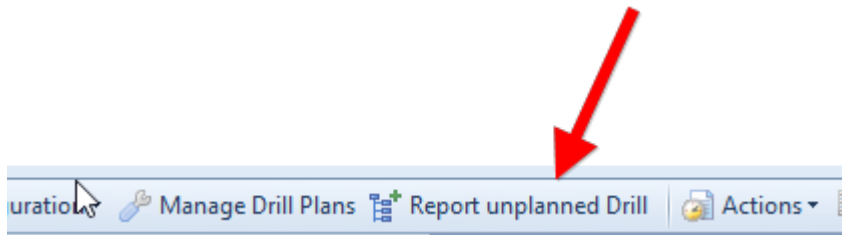
Bitte beachten: der Closing Bereich wird aus Gründen der Performance nicht unmittelbar aktualisiert, d.h. es kann sein, dass ein geschlossener Report unmittelbar nach dem Closing nicht im Closing Bereich zu sehen ist. Nach eine Refresh ist er aber sichtbar.

Folgende Button stehen im Closed Bereich zur Verfügung:

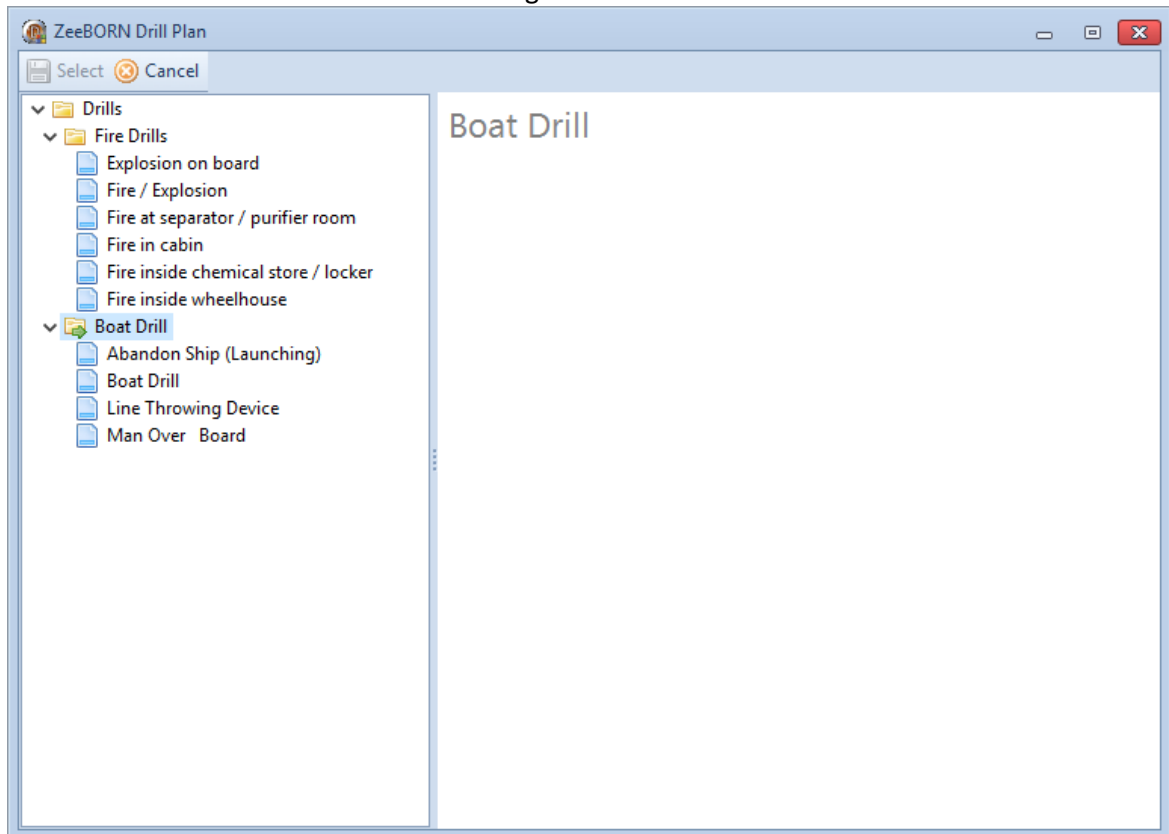
 Share  Show History  Show Documents  Delete  Comments ▾  Re-open	
Share	Die HTML Ansicht des Reports (rechte Seite) kann exportiert oder gedruckt werden.
Show History	Die History des Reports wird angezeigt.
Show Documents	Ansehen von Attachments.
Delete	Löschen des Reports.
Comments	Erfassen oder Anzeigen von Kommentaren.
Re-open	<p>Der Report kann zum erneuten Bearbeiten wieder geöffnet werden. Eine Begründung wird verlangt und nach dem Re-Opening im Report angezeigt.</p> <p><b>Report Details</b></p> <p>Additional: <b>reopened</b></p> <p>Reopen Reason: <b>reopen reason</b></p> <p>Execution Date: 17.11.2016</p> <p>Duration: 05:00:00 to 09:00:00</p> <p>Der Report wird wieder im Folder „Open“ angezeigt.</p>

### Report unplanned Drill

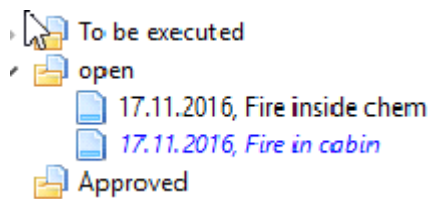
Soll ein ungeplanter Drill reported werden, so muss der Button **Report unplanned Drill** geklickt werden.



Im nächsten Formular wählt man sich den gewünschten Drill:



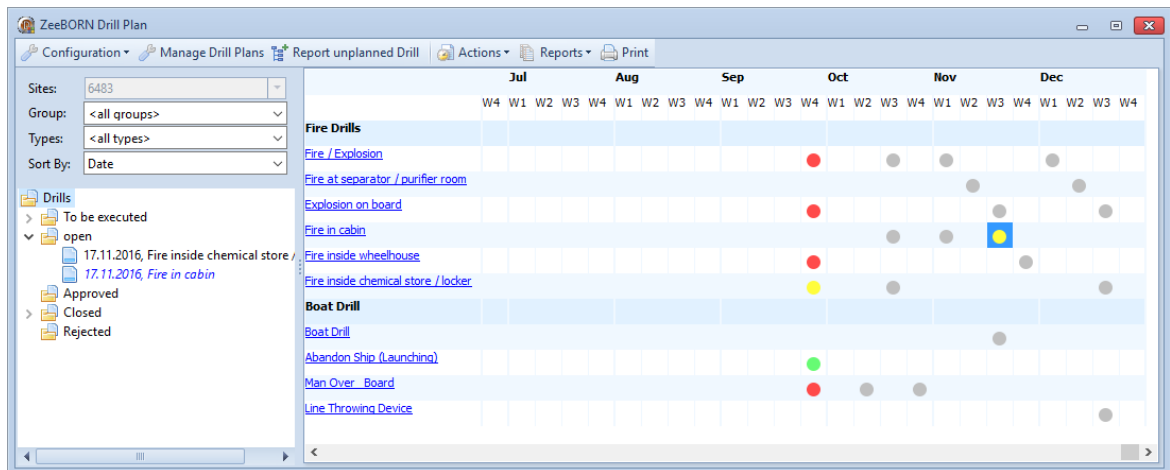
Das Reporten erfolgt dann wie oben beschrieben.



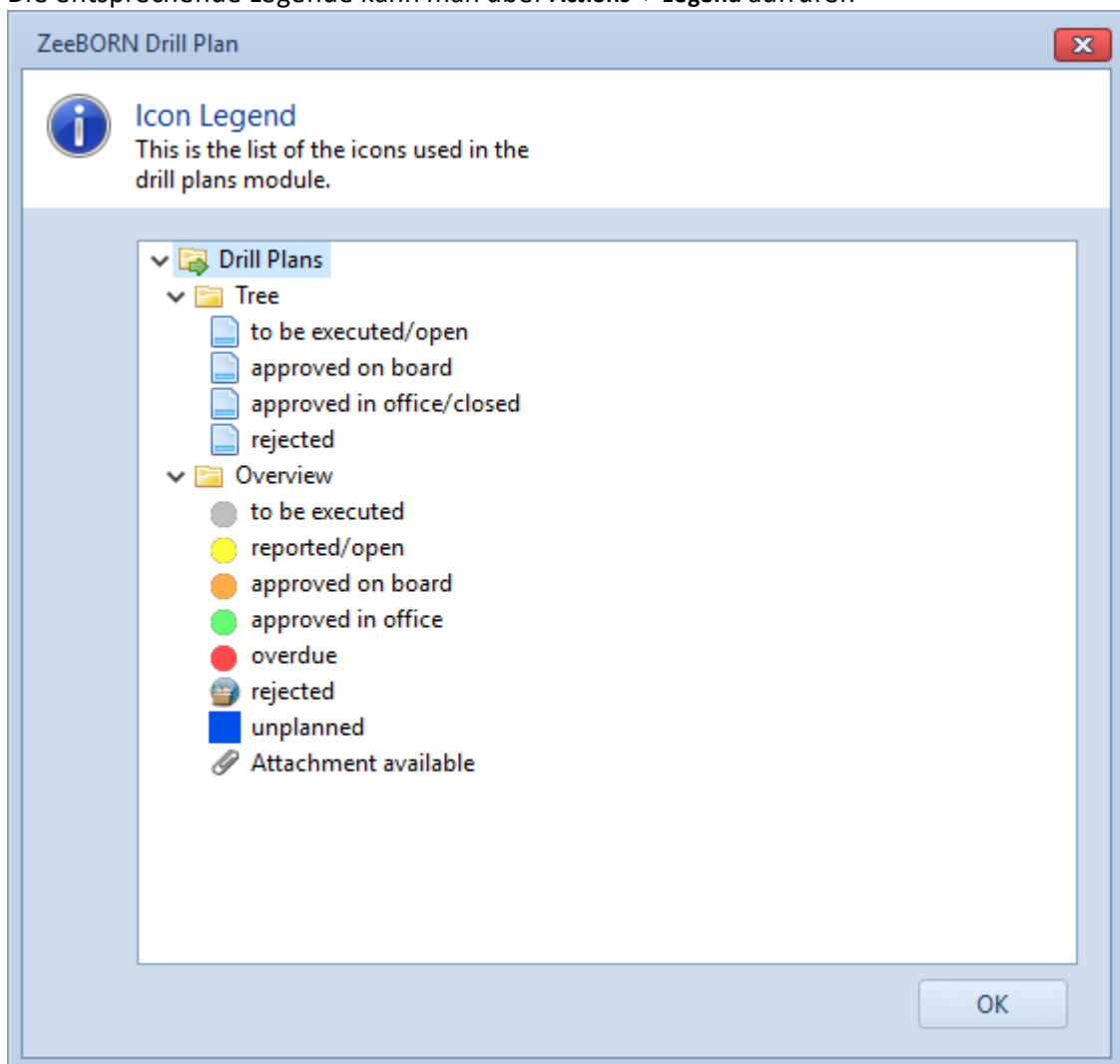
Im Baum werden unplanned Drills blau und kursiv dargestellt:

### Drill Overview

Navigiert man im Baum direkt auf **Drills**, so wird der Drill Plan für das aktuelle Jahr angezeigt.



Die entsprechende Legende kann man über **Actions -> Legend** aufrufen





Mit Klick auf einen Ball kann man

- Entweder den Drill reporten oder editieren -> Status **to be executed** oder **open** vorausgesetzt
- Oder den Drill Report ansehen -> Status **approved** oder **closed**

### **Reports**

#### **Difference between Planned and Execution Date**

Der Report zeigt die Differenz zwischen dem geplanten Zeitraum der Ausführung sowie dem aktuellen Ausführungsdatum.

#### **Overview per Year**

Hier können alle im System befindlichen Drill Übersichten auch aus vergangenen Jahren betrachtet werden. Eine Bearbeitung der Drills ist hier nicht möglich.

## 25 Knowledge Base

---

Welcome to the ZeeBORN Knowledge Base. This document is a fast growing collection of articles with background information for your ZeeBORN System.

### 25.1 General Information

#### 25.1.1 Version Numbers

This document describes the usage of version numbers for ZeeBORN modules.

Due to the fact the all modules of the system will be compiled and released at once there is in fact only one "real" version number for the ZeeBORN system. Nevertheless you will also find version numbers for each module delivered with the system or delivered as an extra gadget.

Starting with version 13.7 each module of the system has exactly the same version number (including the setup module and general gadgets).

#### The Structure of the Version Number

The version number contains in fact details of the release date of the system.

The full structure is: **year.month.release.built**

year	short format of the release year; 2016 = 16
month	short format of the release month; July = 7
release	this is the running number of releases during a month; the release number starts with 0 for pre-releases like alpha versions, beta versions and even release candidates; the first public release starts with 1.
built	The built number is in fact the most important version number detail. The built number is a number that will be incremented with each single full release of the system and will not be reset with newer major or minor releases. As this built number is also used for internal references in the quality assurance process while developing and releasing newer system versions, a "normal" customer won't see each single built because many internal/non-public releases will be created for internal testing only.

The ZeeBORN version number will always show year.month.release only. The built number will only be shown in the about box.

#### Some Examples

16.5.0 This version was released in May 2016. The 0 at the third position indicates that this version is a pre-release version - so this version might include known errors or features might be still missing that have been planned or have been announce for the actual release.

14.1.1 This version was released in January 2014 and is the first release in this month.

8.10.2 This is the second release in October 2008. Maybe it's a bug fix for the initial release or some sort of service pack.

### 25.1.2 00-0001 - Setup doesn't allow to change program path and database path

In some cases you might get very limited possibilities of defining how and where the ZeeBORN modules will be installed. On the other hand you might have seen the Setup program asking you for where you want to place your local program files and where to put the database.

#### Reasons and Solutions

If you install a ZeeBORN module for the first time, you should always have the option of choosing the programs folder and database folder. If this option is not given to you while running the setup program, there might be an older version of the ZeeBORN system already installed on your system (this could be also a ZeeBORN demo or preview). If there is the need of changing the folder during the installation, you must first uninstall all previous versions of the ZeeBORN System - of course this will include the deletion of all data stored so far.

#### Scenarios

**"Yes, I have a demo installed but want to installed the licensed version to another place. I don't need the data I have collected with the demo.":** Uninstall the demo and run the setup program of the licensed version again - you will now have the option where to put the program files and the database.

**"Yes, I have a demo installed and need to keep the data I have already collected with the demo.":** In this case you have to leave the folders as defined during the demo version. The setup program of the licensed version will keep the data and will upgrade the demo to a full version.

**"The demo is already uninstalled but there is still no option for choosing another folder for program files and the database.":** There seems to be a problem with removing all parts and settings of the demo system. Please contact the [ZeeBORN Support](#) and they will give you a tool for removing all remaining files and settings from a previous demo installation.

### 25.1.3 00-0002 - Error message "User limit reached" while starting a module or gadget

During the startup of a ZeeBORN module or gadget you see an error message with the information that a user limit has been reached.

#### Reasons and Solutions

The ZeeBORN System itself doesn't have any limitations according the number of users who will be allowed to use the system at the same time. The message you have seen is an error reported by the database server. The database server used by the ZeeBORN System is a license from a 3rd party software provider. The basic package of the ZeeBORN System includes

only a 5 user license for this database server. If you need additional user licenses for the database server please contact the ZeeBORN support.

#### 25.1.4 00-0003 - The "Reports" section of the Application Menu is always empty

Whenever you start the ZeeBORN Application Menu you don't see any reports in the "Reports" section.

##### Reasons and Solutions

The system originally comes without any entries in this section. The "Reports" section is something like a Favorites folder for often used reports and will only show those reports where you have decided to show them there. In most reports or standard print outs you'll see a button "Add to Reports". Click this button and a short cut to this report will be added to the "Reports" section in the Application Menu. From now on you can start the report without starting the application this report comes from.

#### 25.1.5 00-0004 - Some of the features described in the documentation are not available in the applications

After reading about a feature in the documentation you might experience that this feature is not available as expected.

##### Reasons and Solutions

There is more than one possible reason why this can happen:

1. You might not have the access right for accessing this feature. Please contact your administrator.
2. The feature you are looking for might not be available during the current phase of the work flow (e.g. the "Approve" button for a document is no longer available after approving a document).
3. You might have a limited edition of the ZeeBORN System where this feature is generally not available. But in those cases you will usually find a remark in the section where this feature is described.

#### 25.1.6 00-0005 - I can't update exchange rates using the online update gadget

After starting the online update for getting the newest exchange rates you won't get any updates at all.

##### Reasons and Solutions

This [online update gadget](#)<sup>29</sup> uses a normal Internet connection for downloading the newest exchange rates from a server that is providing these data. As with many other Internet related problems there might be one of the following problems.

1. The access to the Internet might be generally disturbed. Please try if you can use your preferred Internet browser for accessing web pages.
2. The access to the server providing the exchange rates might be blocked by a firewall. This can be a company firewall installed between the internet connection and your intranet or a firewall installed on your computer. Please check (or let your administrator check) if any restrictions are applied by the firewall that might prevent the download of the exchange rates update.
3. Your computer might be connected to the Internet via a proxy server. Internet connections established via a proxy server are currently not supported by the online update tool. You can check if one of your colleagues in your office has a direct Internet connection. He might be able to download the exchange rates update (in this case he will need a [client installation](#) of the ZeeBORN System).

### 25.1.7 00-0006 - Error while opening database table

During the startup of a ZeeBORN module or gadget you see the error message starting with "Error while opening database table ..." and the application terminates after confirming this error.

#### Reasons and Solutions

In most cases this error is caused by deleting single files in the database folder or by copying the database files to another computer or server without using any ZeeBORN approved procedures. But this error can be also caused by hard disk problems or network connectivity problems.

The following steps will help you to solve this problem:

1. Check for potential network connectivity problems. Try to access any other file on the server or the computer where the ZeeBORN database is installed on. If you have similar problems without running a ZeeBORN module, please ask your administrator or any other support person for fixing the problem in the network connectivity.
2. If there is no network connectivity problem: Check the hard disk for errors or and fix them (or replace the hard disk).
3. If none of the above checks and tasks solve the problem you can a) restore the latest backup of the database or b) reinstall the system. Of course restoring a backup is the preferred way before starting from scratch with a clean install.

### 25.1.8 00-0007 - "Database dictionary not found" message during application startup

During the startup of a ZeeBORN module or gadget you see the error message starting with "Fatal Error: Database dictionary [...] not found. ..." and the application terminates after confirming this error.

#### Reasons and Solutions

In most cases this error is caused by accidentally deleting or renaming the database folder. But this error can be also caused by hard disk problems or network connectivity problems that will also lead to that the main database dictionary cannot be found and cannot be opened.

The following steps will help you to solve this problem:

1. Check with Windows Explorer if you can see the dictionary file mentioned in the error message. If yes, please ask your network administrator to check the access permissions for the database directory.
2. Check for potential network connectivity problems. Try to access any other file on the server or the computer where the ZeeBORN database is installed on. If you have similar problems without running a ZeeBORN module, please ask your administrator or any other support person for fixing the problem in the network connectivity.
3. If there is no network connectivity problem: Check the hard disk for errors or and fix them (or replace the hard disk).
4. If none of the above checks and tasks solve the problem you can a) restore the latest backup of the database or b) reinstall the system. Of course restoring a backup is the preferred way before starting from scratch with a clean install.

### 25.1.9 00-0008 - Meaning of tracking information in detail views.

In most of the detail views (or document views) within the system you will see a footer with information showing the timestamp of the last update and who made some changes to the record.

This footer looks like the following example:

*updated: 26.06.2009 10:10:26; database ID: 101; directly changed by Administrator*

#### **Description of Details**

##### **updated**

Shows the date and time when the record was update the last time. This information is especially important for the operation of the data replication module for detecting the data that have been modified after the last data replication.

Changes of a records timestamp can occur by direct modification but can also be caused by updated in other parts of the system (e.g. reporting the receiving of articles in the Purchasing modules lead also to a modification of an articles quantity in Stock module).

##### **database ID**

The database ID is a unique identifier for each independent running copy of a database. This ID is used by the data replication module for identifying the source of a modification of a database record.

##### **directly changed by**

Whenever a user changes a record directly by using one of the available editors in the system, the users name will be saved in the tracking information of the database record.

Please note that the information given in "updated" and "directly changed by" are not necessarily linked to each other. For example: if a users reports the receiving of purchased articles, this users name will not be written to the article record that will be update due to the quantity change caused by receiving a delivery. The articles record will show in this case the receiving data or quantity update date in "update" but will still show the users name who applied changes to the article by using the article editor.

Beside the information described here you should also check the information in history records or tracking details that are available in many places of the system.

### 25.1.10 00-0009 - "No data in database ..."

During the startup of a ZeeBORN module or gadget you see the error message starting with "No data in database ..." and the application terminates after confirming message.

#### Reasons and Solutions

You will usually see this message only after doing a fresh install of a system with a single site license (e.g. ship version, agency version or side office version). Using a site license requires the availability of a copy of the database from a company system that holds the central data of the organization. This copy of the data comes in a data replication package file (file extension [.replic<sub>364</sub>](#)) that can be imported just by double-clicking on the file and following the instructions shown by the system (this feature is available only after installing the ZeeBORN system). If you don't have this .replic file available, please request a full transfer from your head office.


### 25.1.11 00-0010 - Serious error while connecting to database

During the startup of a ZeeBORN module or gadget you see the error message starting with "There was a serious error while connecting to the database ..." and the application terminates after confirming message.

#### Reasons and Solutions

The main reason for this error message is a problem while connecting the ZeeBORN database on the server (or local hard disk for stand-alone installations). There are several scenarios that may lead to a connection problem.

1. The Advantage Database Server is not running on the server: Please make sure that the Advantage Database Server service is installed and running. In case of configuration changes applied to the Advantage Database Server configuration it could be necessary to restart the service.
2. There is a network problem that prevents a connection to the Advantage Database Server even if it is running properly. Please check your network for possible blocks of the Advantage Database Server in your firewall. You may also need to check if there are any potential DNS problems in the network that may prevent a detection of the machine the Advantage Database Server is running on.

3. You may still use an old configuration that enables the usage of the Advantage Database Local Server. The local server is no longer supported since 2009. Please contact the [support](#)  for further assistance.

For further detailed information please read the section "Troubleshooting" in the Advantage Database Server Installation Manual issued by ZeeBORN. This document is usually available as a separate document in PDF format.

### 25.1.12 00-0011 - Couldn't delete file "..."!

In some rare cases you might get an error message regarding a file that cannot be deleted. This message can also be related to the deletion of temporary files that are created during the operation of the software.

#### Reasons and Solutions

Some functions in the system create temporary files that exist only for a very short time. In some cases a virus scanner might prevent the deletion of a file if the virus scanner starts the scanning of the file immediately after the creation of the file. In rare cases the virus scanner still might have the file open for scanning and causes an abortion of the deletion.

The software already takes in consideration that a virus scanner might cause such behavior and retries to delete the file again until success. But if this period of re-trials exceeds a time span of more than 3 seconds, the software stops the deletion attempt and shows the error message.

If such a problem occurs, please take into consideration an exclusion of the affected files, file types or file locations from the virus scanning. In any case, please forward this problem to our support team so we can investigate the problem.

### 25.1.13 00-0012 - ADS Error 6420

Users may get at start of the application an error messages informing about a problem with connecting to the database server ("*Connection to database failed with error code 6420.*"). The problem seems to be related to Windows 10 PCs and Windows Server versions up to version 2019.

#### Reasons

Some of the latest updates delivered by Microsoft introduced a bug that prevents the detection of the Advantage Database Server in the local network. Microsoft is already aware of this problem and is working on a solution. Unfortunately this problem needs to be solved by installing the latest available updates for Windows Server and the Windows client PCs.

#### Solution

ZeeBORN has developed a workaround that allows reestablishing the connection to the database server without waiting for the necessary updates to be released by Microsoft.

There are 2 tools available for download:



1. **ADSCheck.exe** (<https://downloads.zeeborn.net/ads/ADSCheck.exe>) performs a basic test of the database connection on the client PC. Download the tool, copy it to the bin folder of your software installation (usually the folder where the ZeeBORN.exe is to be found) and run the tool as a normal user. If a normal connection fails, it tries to connect to the database with the workaround developed by ZeeBORN. The tool creates a log giving detailed information about the test results.
2. **ADSFix.exe** (<https://downloads.zeeborn.net/ads/ADSFix.exe>) creates a special configuration file that enables a bypass of the normal database server connection process by providing "hard coded" configuration info to the ZeeBORN application. Download the tool, copy it to the bin folder and run the tool as Administrator. After running the tool, the bin folder will contain a ADS.INI file with the necessary information for bypassing the database server detection process. If there is any problem while creating the file, the tool should give further instructions for the proper use of the tool.

### 25.1.14 00-0013 - Database Re-Indexing

If the software shows error messages regarding database index problems, a re-indexing of the database is required.

#### Reasons

Index problems are usually caused by shutting down the server where the database is hosted while users are still working in the ZeeBORN application. Those shut-downs can be caused by malfunctioning power supply, any other hardware problems or if a user accidentally shuts the server down.

#### Solution

ZeeBORN provides a tool that allows the re-indexing of the database. This tool is available for download at <https://downloads.zeeborn.net/ads/DBReindex.zip>

The actual re-indexing process isn't that time consuming and should finish within a few minutes. For a office database the time required for the re-indexing depends on the number of ships and sites managed in the system.

1. Download the archive DBReindex.zip
2. Extract the archive to the ZeeBORN program folder (default is C:\Program Files (x86)\ZeeBORN\bin)
3. Make sure that an up-to-date backup of the database does exist.
4. Make sure that no user is connected to the database. All ZeeBORN applications must be closed. This is required because the re-indexing tool needs exclusive access to the database. If there is still an active connection to the database, the tool will show a related error message.
5. Start the tool by running the DBReindex.exe.
6. Start the re-indexing process by clicking the **Start** button.
7. After the re-indexing process finishes, check the created log for any error messages.

### 25.1.15 00-0014 - Error 7009

Sometimes the system may show an error message including an error code 7009.

#### Reasons

The error code 7009 is reported by the database engine server and identifies a problem with writing data back to the database.

In most cases this problem is caused by a full server hard disk.

#### Solution

For solving the problem you will need to delete some files from the server that are no longer needed.

A good place to look for obsolete files is folder %zeborndata%\Replication Files. The **Download** and **Import** sub-folders usually contain files that have been imported already.

## 25.2 Maintenance

### 25.2.1 02-0001 - Error message "No parent component with own counter found."

During the creation of a maintenance report you get the following error message while saving the report: "Internal error [MainCompCounterLookup]: No parent component with own counter found."

#### Reason

While saving a maintenance report the system also updates the running hour counters of affected components. The counter value given in the report will be set for all sub-components without an independent counter. If the component you are creating the report for doesn't have an own counter, the system tries to find a parent component with an own counter - beginning from this component the counter update will be done for all sub-components.

If such a parent component with an independent counter cannot be found, the counter update of the related parent and sub-components cannot be performed. Only the component you are creating report for and their sub-components will be updated.

#### Solution

Usually you'll have to find a parent component in the hierarchy that has an independent running hours counter. Find this component and use the **Edit** function for setting the checkbox **Uses own counter**.

### 25.2.2 02-0002 - Error message "Internal Error [FindComponentInTree] ..."

This error can be shown after using the **Search** function for finding a component, selecting one of the search result and clicking the **Go To** button for navigating to the selected component.

#### Reason

For showing the selected component in the tree view, the search function needs to follow the hierarchy of the components. This starts with the selected component and continues with the related parent component until the topmost entry in the tree (the site) is reached.

In case of an error the search function arrived at a stage where the parent component the current component is pointing to, does not exist.

### **Solution**

Please write down the information shown in the error message (component ID and parent ID) and request a database cleanup from your system administrator or from [support](#)<sup>366</sup>.

## **25.2.3 02-0003 - Warning "The calculated average running time is greater than 24 h."**

While entering new counter values into the [Counter List](#)<sup>184</sup> you see this warning while the new average running time ([ART](#)<sup>360</sup>) is calculated based on the entered values.

### **Reason**

The new average running time will be calculated based on the starting date of a component (also shown as "In operation since" in component details), the start counter at this time and the current date and counter value. If the resulting average running time of the component exceeds 24 hours, the new counter value is too high.

As this additional check has been added in version 10.1.1 of the system, you might already have wrong counter values in your database that exceed the max. 24 hours ART limit. Just by adding one more hour to the counter value will show you the warning message.

### **Solution**

1. Check the new counter value if it is correct.
2. Check if the starting date of the component is properly set and change it if necessary.

If the counter value will not be corrected and the warning will be ignored, the system automatically will assume an average running time per day of 24 hours.

## **25.2.4 02-0004 - Maintenance report requires attachment**

For some maintenance jobs it can be required to add additional document files to the final maintenance report. If this requirement has been defined, you'll see a warning before the actual creation of the report starts, giving you a chance to prepare the required documents.

Please check the available job description for this job to get further information about the documents to be attached to the report.

The required attachments need to be added in the maintenance report via the tab "Documents and Files".

## 25.3 Data Replication

### 25.3.1 07-0001 - Not all sites are available for data replication

The database replication is available only for sites with a valid license. Sites created manually in the Administration tool will not be enabled automatically for database replication as long as this site has no valid license.

#### Reasons and Solutions

If you are sure about having a valid license for the site in question, please check if the newest license files are installed on your server. The newest license keys will be installed with the latest setup program. You may install the latest known setup again to ensure the proper installation of all licenses you have purchased.

If you are not sure about having a valid license, please check with ZeeBORN support if a license has been already issued. You can request an resending of the latest license key package (if already purchased) or you can purchase the missing licenses - newly purchased licenses will be made available with 1 working day.

### 25.3.2 07-0002 - Import shows warning about time gaps in transfer

While starting the import of a transfer package you get an error message about a time gap between the last imported data and the new transfer you are about to import.

#### Reasons and Solutions

A typical reason for this warning is the skipping of incoming transfer files. This skipping might occur just by forgetting to import all incoming transfer files. In other cases a transfer file might get lost on the way to you (e.g. problems with e-mail transfer etc.).

To avoid this warning, please make sure that all transfer files will be imported in the same sequence the files have been created.

Further options are:

1. Try to find the missing transfer file and import this first.
2. Request another transfer from the site you are receiving the transfer from. The sender will have to initiate a manual transfer by using the "Recover" option (see [Transferring changes to other sites](#)<sup>[234]</sup> for more details). That means: he will create a transfer file while setting the start date of data to be considered for the transfer manually. Give him the "last import date" shown in the warning message as the starting point for the new transfer.

*Note: In previous software versions it was still possible to continue the import. For a better consistency of data this situation is now considered being an error and a recovery transfer will be necessary.*

## 26 Glossary

---

The Glossary includes a list of terms used in this documentation that might need further explanation.

### 26.1 ART (average running time)

The average running time (ART) is used for calculating a machinery components next schedules for maintenance jobs. For example: a maintenance job defined as to be done every 48 hours will be added to the schedules list if the component is in operation 24 hrs per day. If the component would run only 12 hours per day, the necessary maintenance job would be added to the schedules list every 4 days (= 4 x 12 hrs/d).

### 26.2 bcc

bcc is used as an abbreviation for "blind carbon copy" in e-mail programs. This allows the sender of an e-mail to send an e-mail in copy to other recipients without letting the main recipient know that others got a copy of this e-mail as well.

A typical scenario for using the bcc instead of cc is the sending of a newsletter. This help you to hide the used e-mail addresses from the recipients who receive your newsletter via e-mail. They will be just able to see the e-mail address in the to and [cc](#)<sup>360</sup> fields of the e-mail message.

### 26.3 cc

cc is used as an abbreviation for "carbon copy" in e-mail programs. Beside the recipients address given in the "to" section of an e-mail message you can add further e-mail addresses in the "cc" section. Using "to" and "cc" properly helps the recipients of such e-mail to determine if he got the e-mail directly (a reply might be necessary) or if he just got the e-mail in copy ("cc") for being informed about an ongoing conversation.

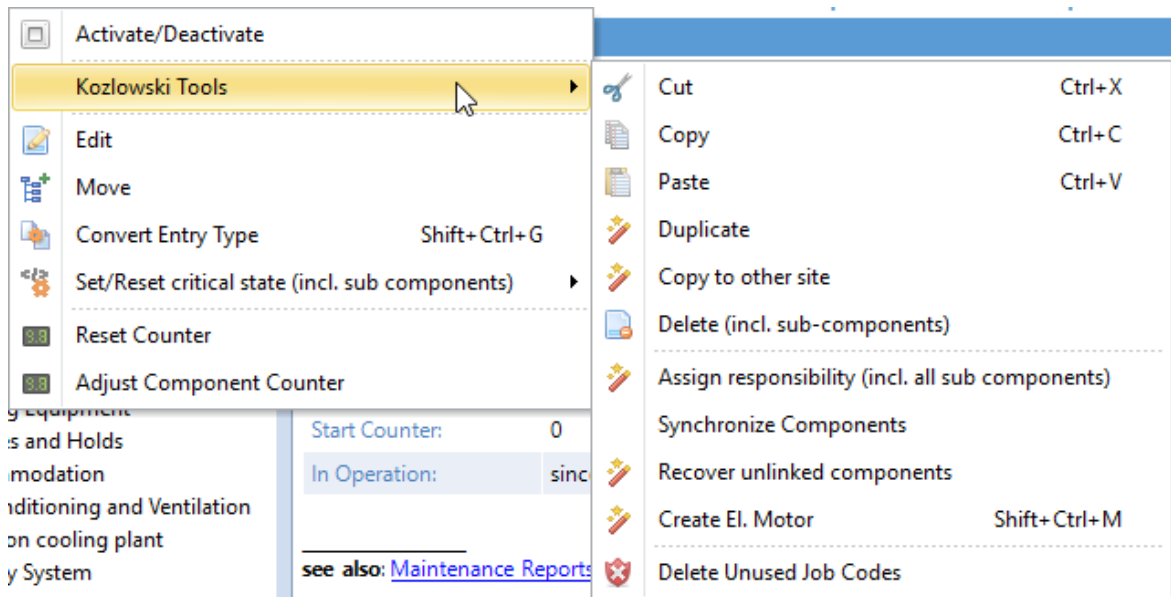
### 26.4 Free Line Item

The term Free Line Item is used in the Purchasing module for line items that do not have a relation to any other entries in the system. Usually a line item relates to an article in Stock Control, a maintenance job in the Maintenance module as part of a service order or a machinery component in the Maintenance module.

Free line items do not produce any tracking information in the system that could be used for consumption statistics and similar reports.

### 26.5 Kozlowski Tools

Kozlowski Tools is a collection of powerful tools that assist with the maintenance of a ship's data.



Those tools are only available while being logged in as Administrator or when the user access right **General > Access to Pre-Release Features > Maintenance > Kozłowski Tools** is assigned.

Whenever you plan to use the Kozłowski Tools, it's always recommended to create a backup of the ZeeBORN database first. Using the tool in a wrong way can easily damage a huge part of the database.

The following functions are available:

Cut, Copy, Paste	Allows to cut, copy and paste components incl. all related maintenance jobs, spare part assignments and linked documents. The functions can only be used within a ships database.
Duplicate	Creates one or more duplicates of a selected component. This is especially useful for tasks like defining the properties of one engine's cylinder and finally creating the required amount of cylinders in the database.
Copy to other site	Allows to copy the data of a selected component and sub-components to another ship. This also includes relevant details like maintenance jobs and spare parts.
Delete (incl. sub-components)	This allow to delete a component with all sub-components. Usually the system is limited to delete components one by one.

Assign responsibility (incl. all sub components)	This allows to assign a selected responsibility to the maintenance jobs of the selected components and all sub-components.
Synchronize Components	Allows to copy maintenance and spare part information from one component to another.
Recover unlinked components	This tool helps to cleanup data imported from external sources. Sometimes imported data may included references to parent components that do no longer exists. Without this reference it's impossible to navigate to an affected component in the tree view. The Recover function assigns the "lost" components directly to the ship. You may use the Copy,Cut,Paste functions to move the component to the correct location.
Create El. Motor	Creates a electrical motor sub-component for a selected component.
Delete Unused Job Codes	After finalizing the ship's database, this function can be used to delete all unused job codes and job descriptions from the database.

## 26.6 PO

PO = Purchase Order

## 26.7 RfQ

RfQ = Request for Quotation

## 26.8 RQ

RQ = Requisition

## 26.9 zbDoc

zbDoc is a special document file format exclusively used by ZeeBORN applications. The document viewer required for this file format is included in the ZeeBORN system will be installed together with the system. A stand-alone version of this viewer can be downloaded at <http://www.zeeborn.net/support/downloads>.

## 26.10 %ZeeBORNCClient%

%ZeeBORNCClient% is an Windows environment variable defined during the setup. This variable points to the local client directory where all client files of the system are installed. Those Windows environment variables can be used within batch files or for other purposes where the info about directories used by the system is required.

### Example:

You can start the Cleanup tool from the command line (or PowerShell) by entering %ZeeBORNCClient%\bin\cleanup

## 26.11 %ZeeBORNDData%

%ZeeBORNDData% is an Windows environment variable defined during the setup. This variable points to the remote data directory (usually on a server) where all central data files of the system are installed.

Those Windows environment variables can be used within batch files or for other purposes where the info about directories used by the system is required.

### Example:

You can start the Cleanup tool from the command line (or PowerShell) by entering %ZeeBORNCClient%\bin\cleanup

The following folder structure is used on the server:

%ZeeBORNDData%\DB	Central place for all database files There are several sub-folders in this folder that contain the data of individual ships. The IMO number of each ship is used as the folder name.
%ZeeBORNDData%\Install	This folder contains all files for installing the software on additional network clients.
%ZeeBORNDData%\Logs	This folder contains system logs that can be used by the support team for identifying potential causes of reported errors or problems.
%ZeeBORNDData%\Replication Files	This is the standard folder where all created and imported replication files will be stored. It's recommended to run the Cleaner tool frequently for removing older replication files that are no longer needed.
%ZeeBORNDData%\Reports	This folder contains report templates for all print reports provided within the system.
%ZeeBORNDData%\res	This folder is used for optional layout resources that allow a detailed customization



of system features.

## 26.12 %ZeeBORNShared%

%ZeeBORNShared% is an Windows environment variable defined during the setup or via a dedicated configuration module. This variable points to a directory that will be used for exporting files created by the ZeeBORN system (e.g, replication files, report output).

The main purpose of the environment variable is to defined a shared folder on a server that will be used by all users as a central place for storing files created by the ZeeBORN system. If this folder is not configured, it will point to the users Documents folder.

Those Windows environment variables can be used within batch files or for other purposes where the info about directories used by the system is required.

## 26.13 .replic

.replic is a file extension used for files created by the ZeeBORN [Database Replication](#)<sup>234</sup> module. These .replic files contain all information for synchronizing stand-alone copies of a central database.

## 26.14 MC

MC = Master Contract

## 27 ZeeBORN Helpdesk

---

### ZeeBORN Tasks

For reporting tasks to ZeeBORN, you can now record them directly in the system.

A ZeeBORN Task can be added directly in the Task Tracker via **New -> ZeeBORN Task** or can be created at the lower left corner of the system's main window where you can find the helpful tools.

In the TAN, the abbreviation "ZB" makes it easy to identify that this is a ZeeBORN task e.g. "ER-ZB-AI-O-18-001"

All tasks from the ZeeBORN system are displayed in the module Task Tracking (also from Audit & Inspect, Incidents etc.), but there is a button that the settings can be made with just on click so that only ZeeBORN Tasks are displayed.

*NOTE: If you want that the task is forwarded to ZeeBORN Support, as Responsible person "ZeeBORN Tasks Support" must be assigned.*

### Handling of tasks, which should not be sent to ZeeBORN

If a task is not to be sent to ZeeBORN, but processed in-house, then you can go through the process as usual, but enter the appropriate Responsible Person.

In order to distinguish whether the tasks are processed in-house or by ZeeBORN, the tasks assigned to ZeeBORN are displayed in red.

Please find more details under <https://doc.zeeborn.net/zeeborn-tasks.htm>

## 28 Support

---

For support please contact:

ZeeBORN GmbH  
Gutenpaarener Dorfstrasse 48  
14669 Ketzin  
Germany

Phone: +49 (33233) 7474-84

E-Mail: [support@zeeborn.net](mailto:support@zeeborn.net)

For after office hours contact details please see your individual support contract

or visit the homepage at [www.zeeborn.net/support](http://www.zeeborn.net/support)