Assets Tasks

The module Assets Tasks is designed to register all tasks. Tasks can be based on counters, like running hours or based on time intervals. As soon as a task is scheduled, it is added to the work list.

- What does the fixed interval option do?
- How do I copy or move a category, group or task?
- How do I change the order of a category, group or task?
- How do I create a group?
- How do I create a new task?
- What does Requires Approval do?
- How do I make the task description visible in the work list?
- How do I add documents to a task?
- How do I add photos to a task?
- How do I link spare part(s) to a task?
- How do I order the required parts for a task?
- How do I create a service request?
- How do I mark a task as complete?
- How do I print a work order?
- How do I see the history of a task?
- How do I undo a completed task?
- How do I add a document to a completed task?

What does the fixed interval option do?

The fixed interval option can be selected when you create a:

- maintenance task.
- safety drill.

The following table clarifies what this option does.

A task or a drill has an interval of one month.

	No fixed interval	Fixed interval
Expiration date	1 January	1 January
Date of first execution	3 January	3 January
Next expiration date	3 February	1 February
Date of second execution	6 February	6 February
Next expiration date	6 March	1 March

With a fixed interval, the next expiration date is always calculated from the first expiration date.

How do I copy or move a category, group or task?

1. Right-click on a category, group or task and select **Copy...** or **Move**...
2. Select the location to which the category must be copied or moved.
3. Click on **Save & close.**

When moving a category, you will be prompted if you want to copy the history as well. If you select this option, a copy of the history will be moved to the new location. If you do not select this option, the history will only be available in the current location.

How do I change the order of a category, group or task?

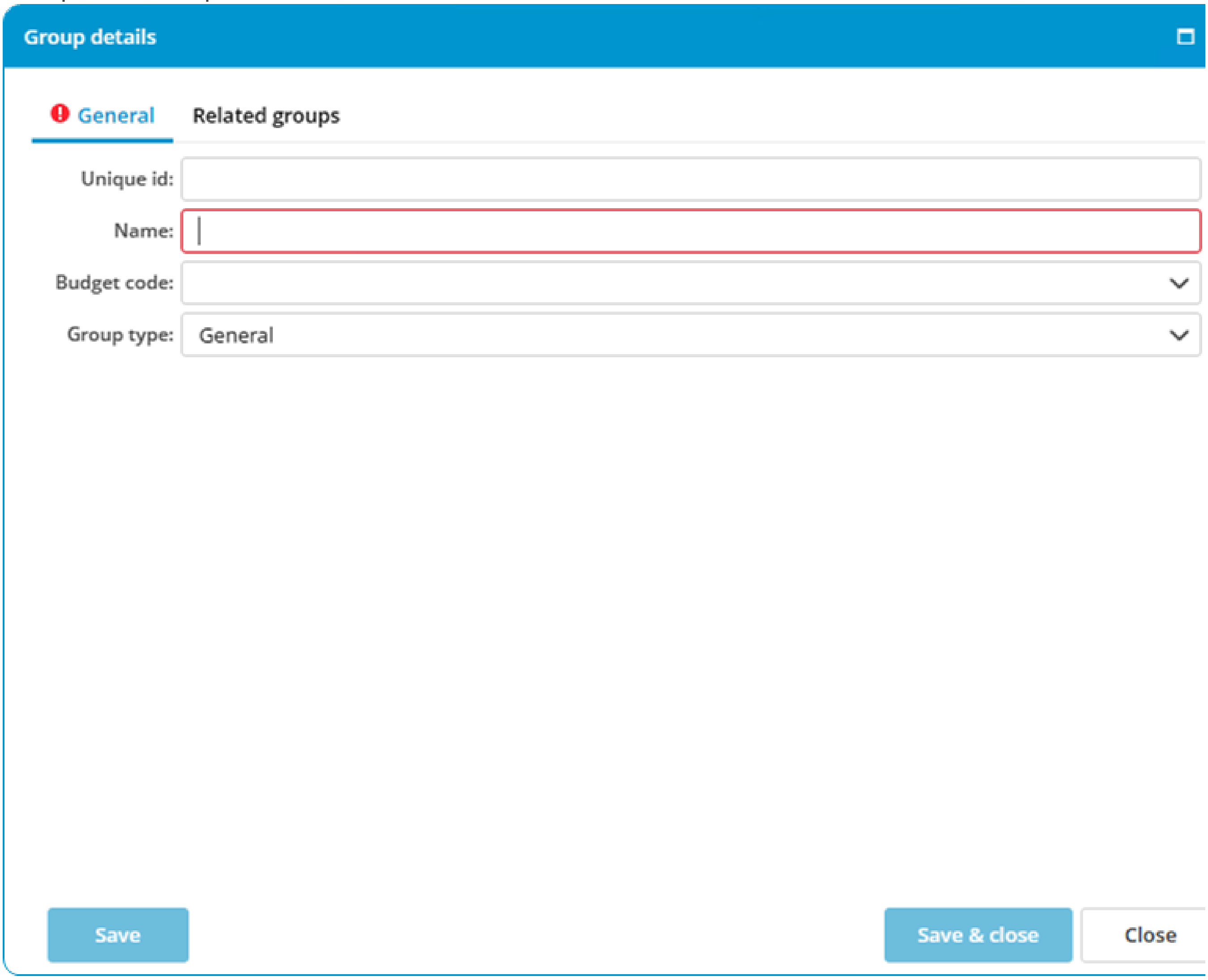
The same process is used to change the order of a category, group or task in MXSuite.

1. Right-click on a category, group or task and select **Reorder...**
2. Select a line and use **Move up** and **Move down** to change the order.
3. Click on **Save & close.**

How do I create a group?

A group is used to group tasks together. This makes it easier to place all tasks with the same interval in one group. This also makes it possible to mark all tasks in a list as done.

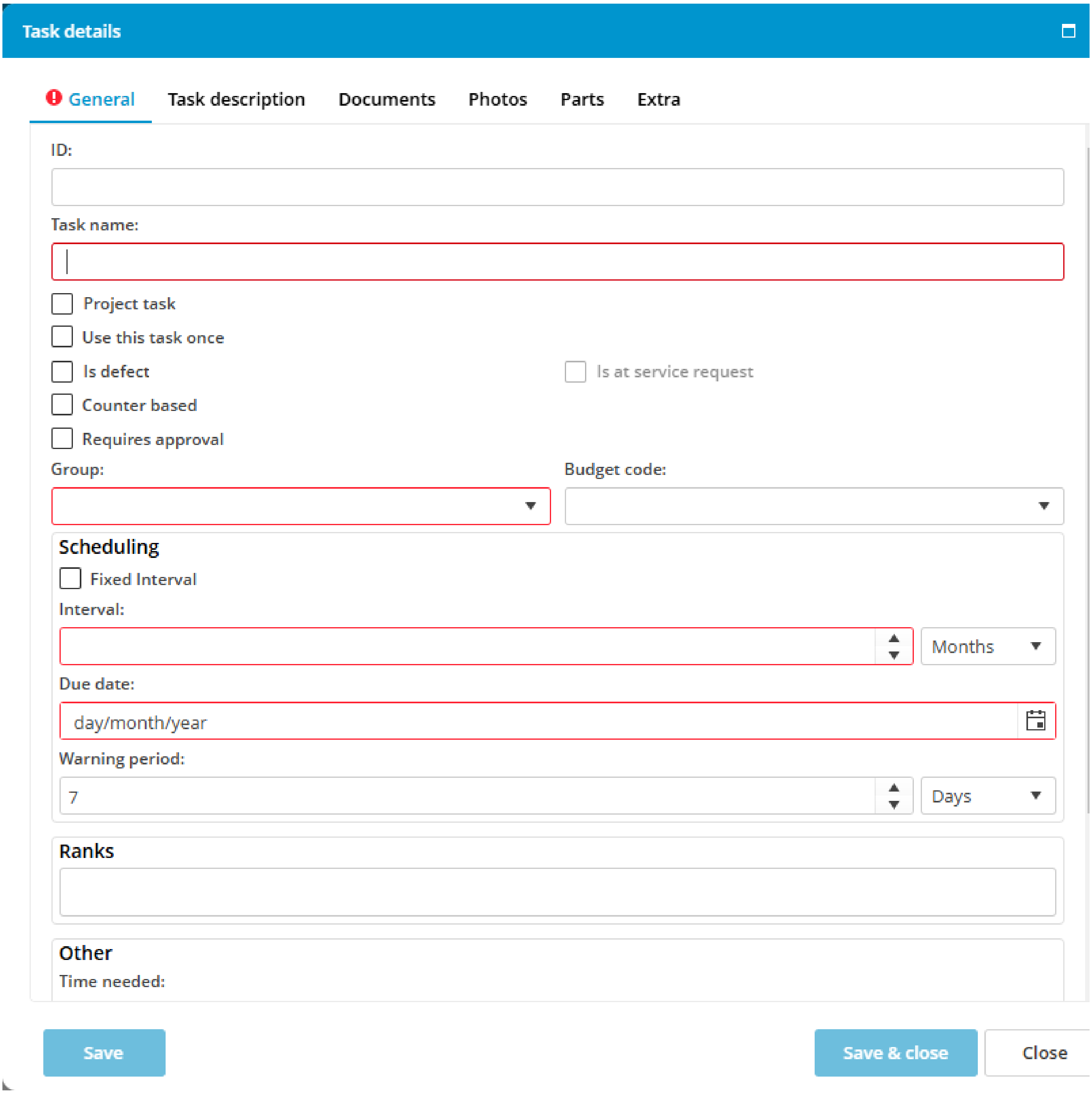
1. Click on **New group...**
2. Complete all required fields.



3. Click on **Save & close**.

How do I create a new task?

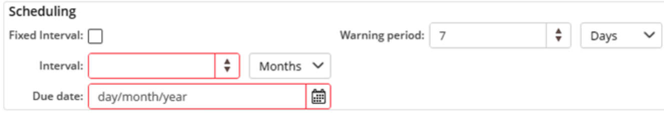
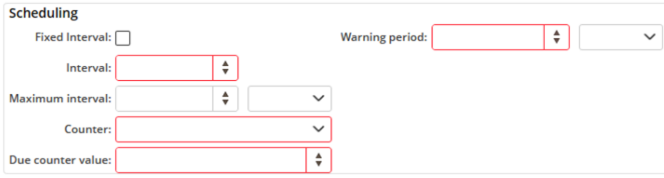
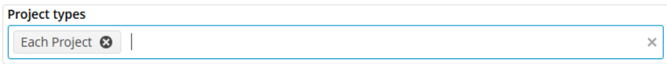
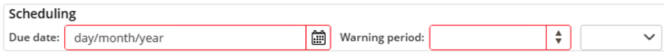
1. Click on **New task...**



2. Fill out all the fields
3. Select a **Group.**
4. Select the correct interval for scheduling the task (see below)
5. Click on **Save & close.**

Scheduling options

Type	Explanation

Time interval (default)	Enter an Interval and select day, week or month. The Due Date is calculated based on today's date + interval. Extra option: • Fixed interval 
Counter based	Enter an Interval and select a counter. Enter the Due Running Hours. If the current counter value has been entered, the hours will be added automatically. Extra options: • Fixed interval • Maximum interval Enter an interval and select day, week or month. This option allows you to perform a task with time intervals in addition to the counter. 
Project task	Select if the project task should be added to a selected type of projects. 
Use this task once / Defect	Select when the task should be performed. 

Other fields:

- **ID**: This is a unique number that will be added before the task description.
- **Ranks**: Select one or more ranks. Only users with one of these ranks can see the task on the job list.
- **Time needed**: Specify how many hours are needed to perform this task.
- **Remark is mandatory**: When you sign off on a maintenance task, the comments field is required.
- **Attachment is mandatory**: When you sign off on a maintenance task, it is required to add a task completion document.

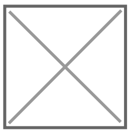
What does Requires Approval do?

The requires approval function makes sure a task is correctly executed.

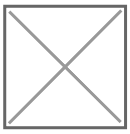
When this option is ticked when creating a task, you can select different ranks which can approve the execution of this task.

This can be done within the section **Approver ranks.**

1. Select **Requires approval**
2. Select the desired ranks within the **Approver ranks** field.

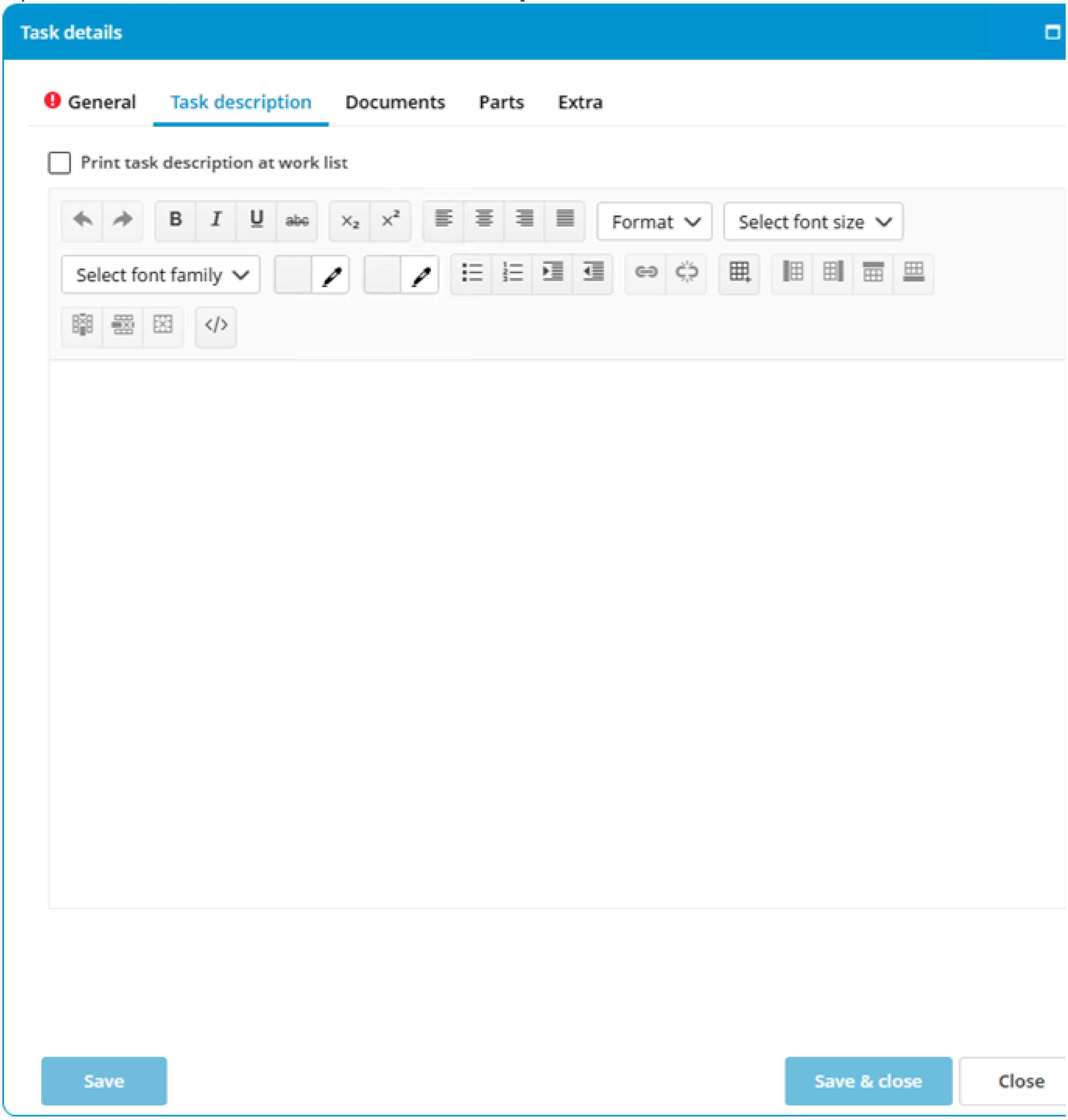


It is possible to select multiple ranks which can approve this task.



How do I make the task description visible in the work list?

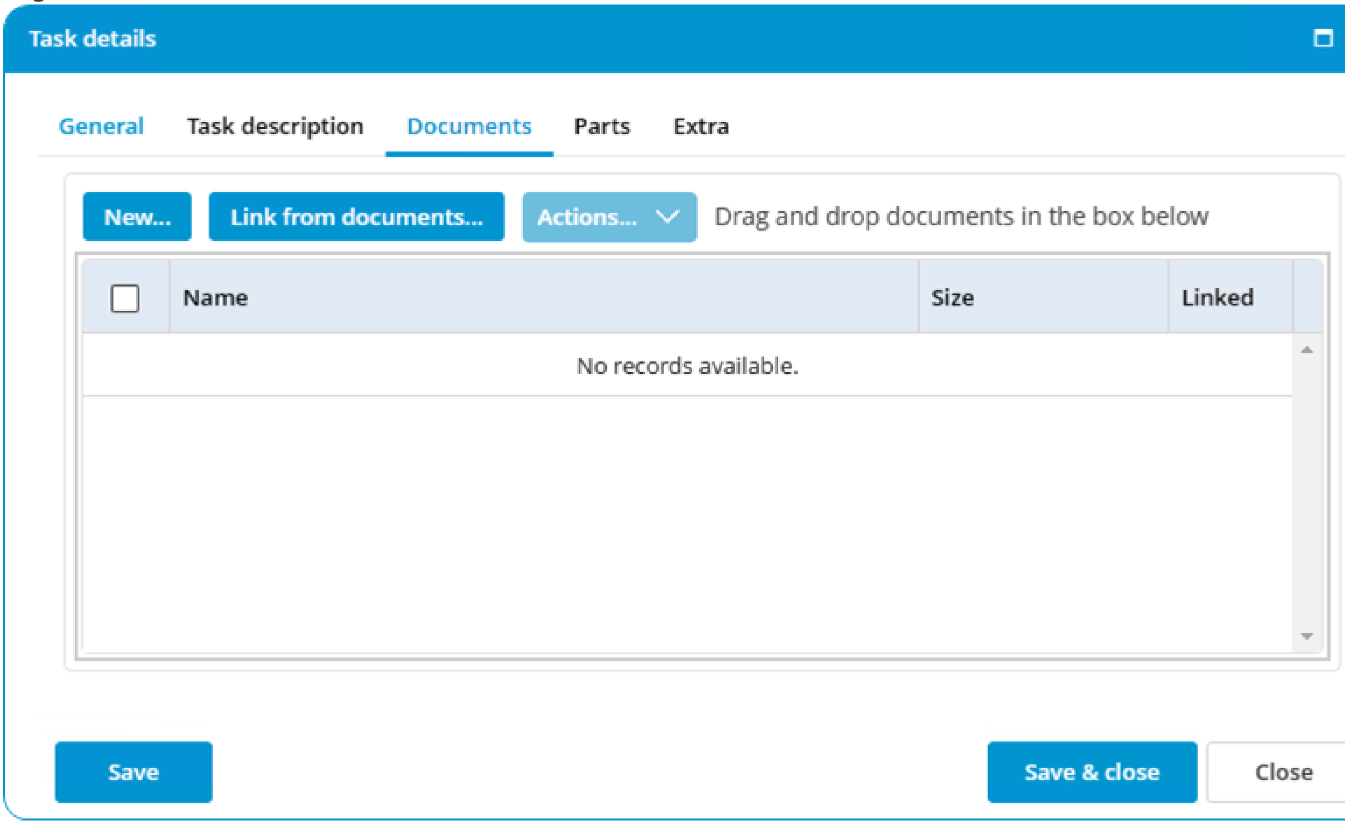
1. Open the task and select the tab **Task Description.**



2. Select the option **Print task description at work list.**
3. Click on **Save & close.**

How do I add documents to a task?

1. Right-click on a task and select **Edit task...**

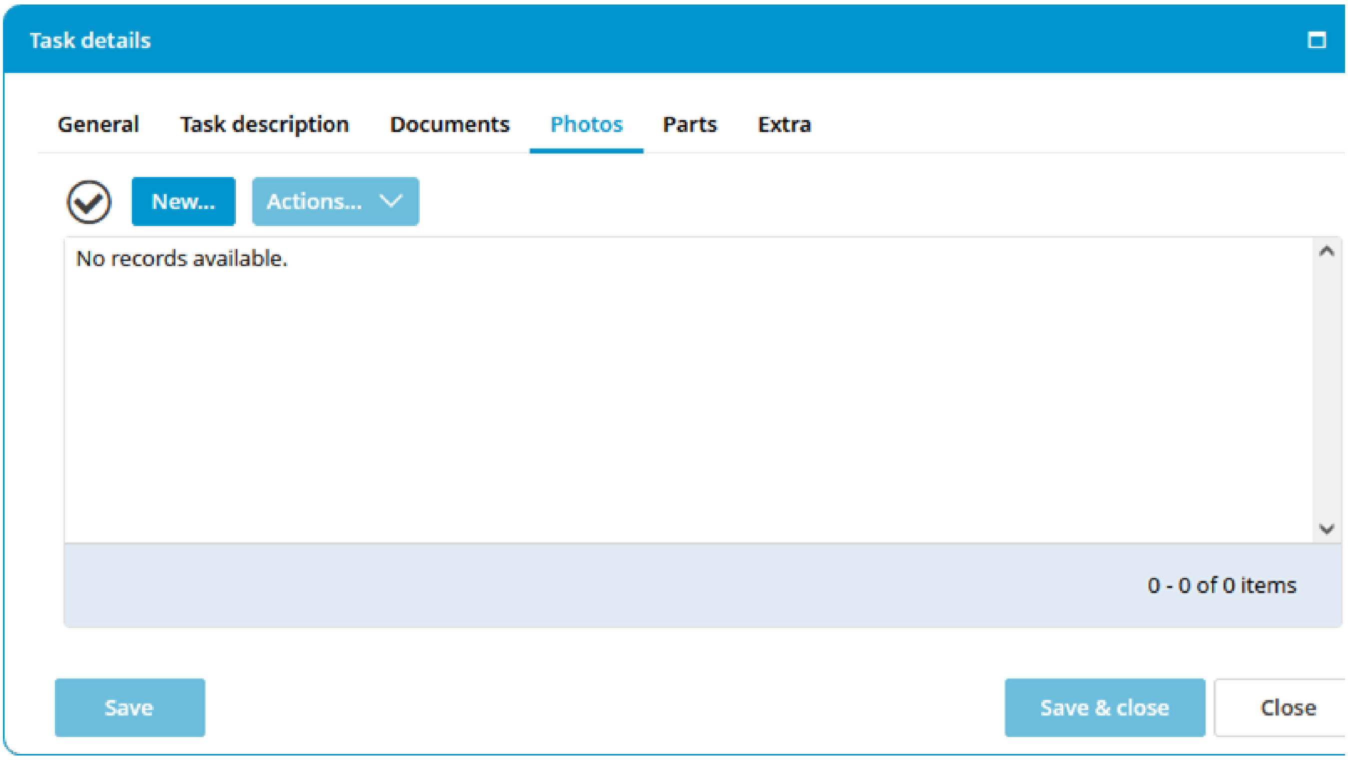


2. Go to the tab **Documents.**
3. Click on **New...** and select the document.
4. Click on **Save & close**.

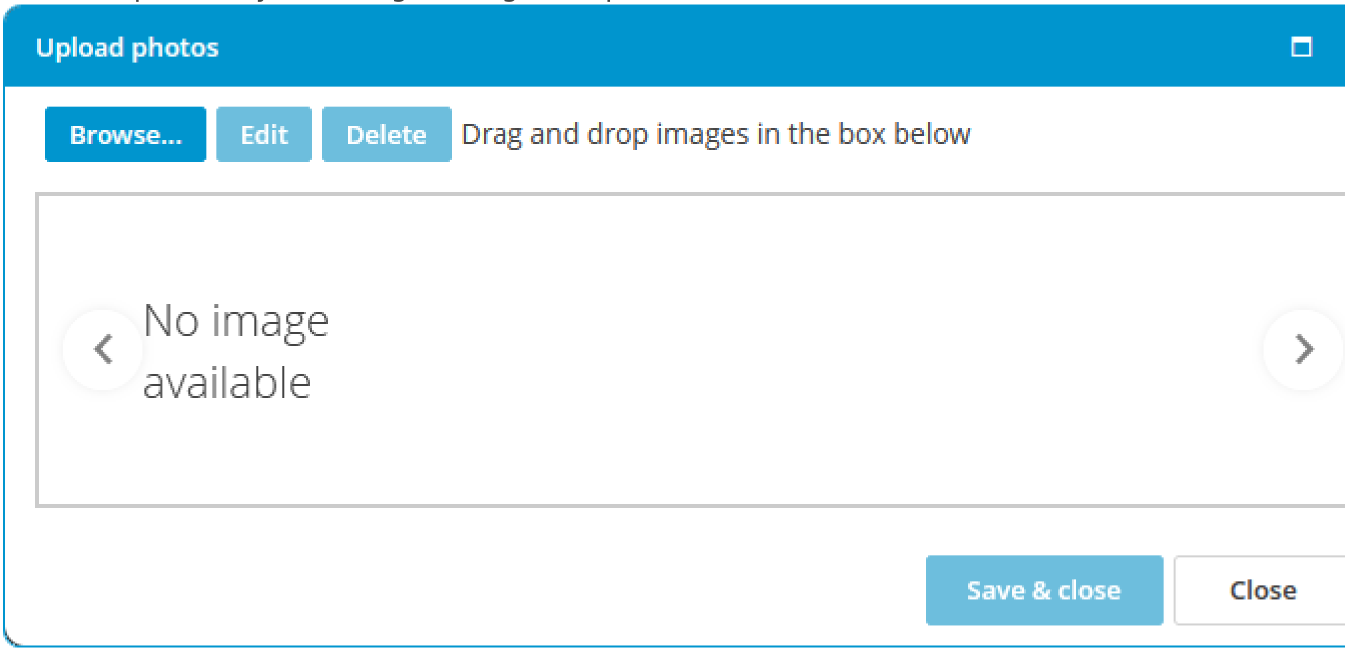
> The option **Link from documents...** makes it possible to add a document from the module Documents.

How do I add photos to a task?

1. Right-click on a task and select **Edit task...**
2. Go to the tab **Photos.**



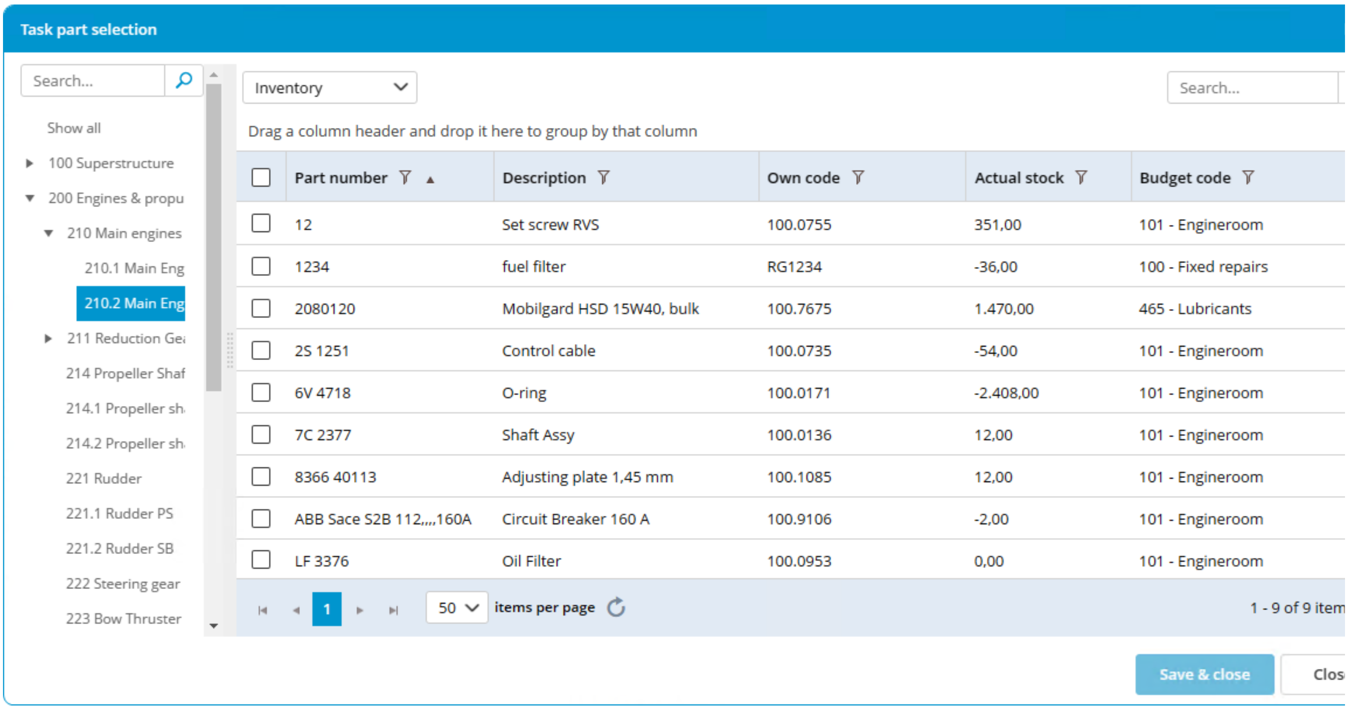
3. Click **New...**
4. Add new photos by browsing or drag & drop.



5. Click **Save & Close.**

How do I link spare part(s) to a task?

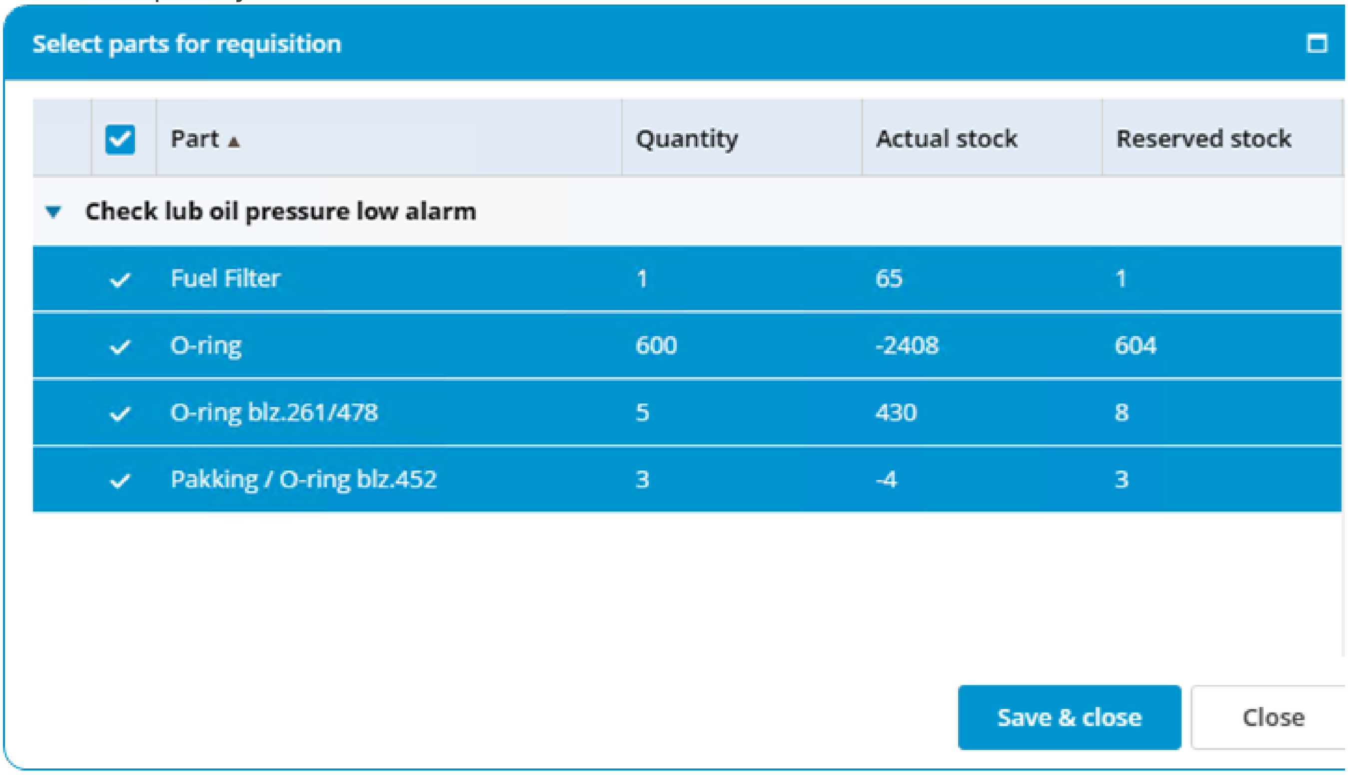
1. Right-click on a maintenance task and select **Edit task...**
2. Go to the tab **Parts.**
3. Click on **Select Part(s)...**



4. Select the part(s) (you can select multiple parts using Ctrl or Shift).
5. Click on **Ok.**
6. Enter the quantity of parts needed. When completing the task, the stock of the selected parts will be updated.

How do I order the required parts for a task?

1. Right-click on a task and select **Create requisition...**
2. Select the parts you want to order.

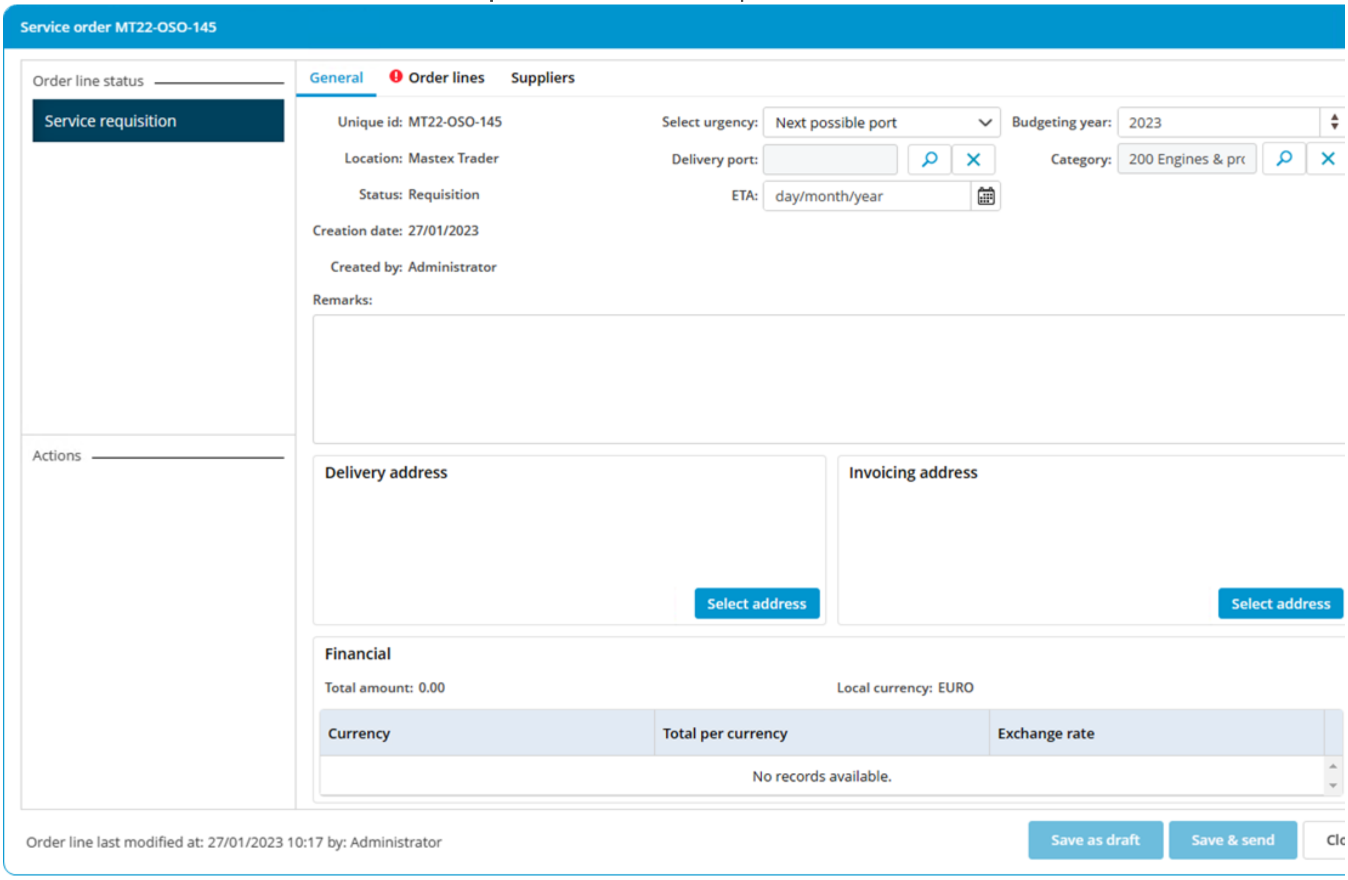


3. Click on **Save & close.**

> An alternative option is to add the required parts to the basket, and use the basket when creating the requisition in the purchase module.

How do I create a service request?

1. Right-click on a category and select **Create service request...**
2. Note the reason for the service request in the description.



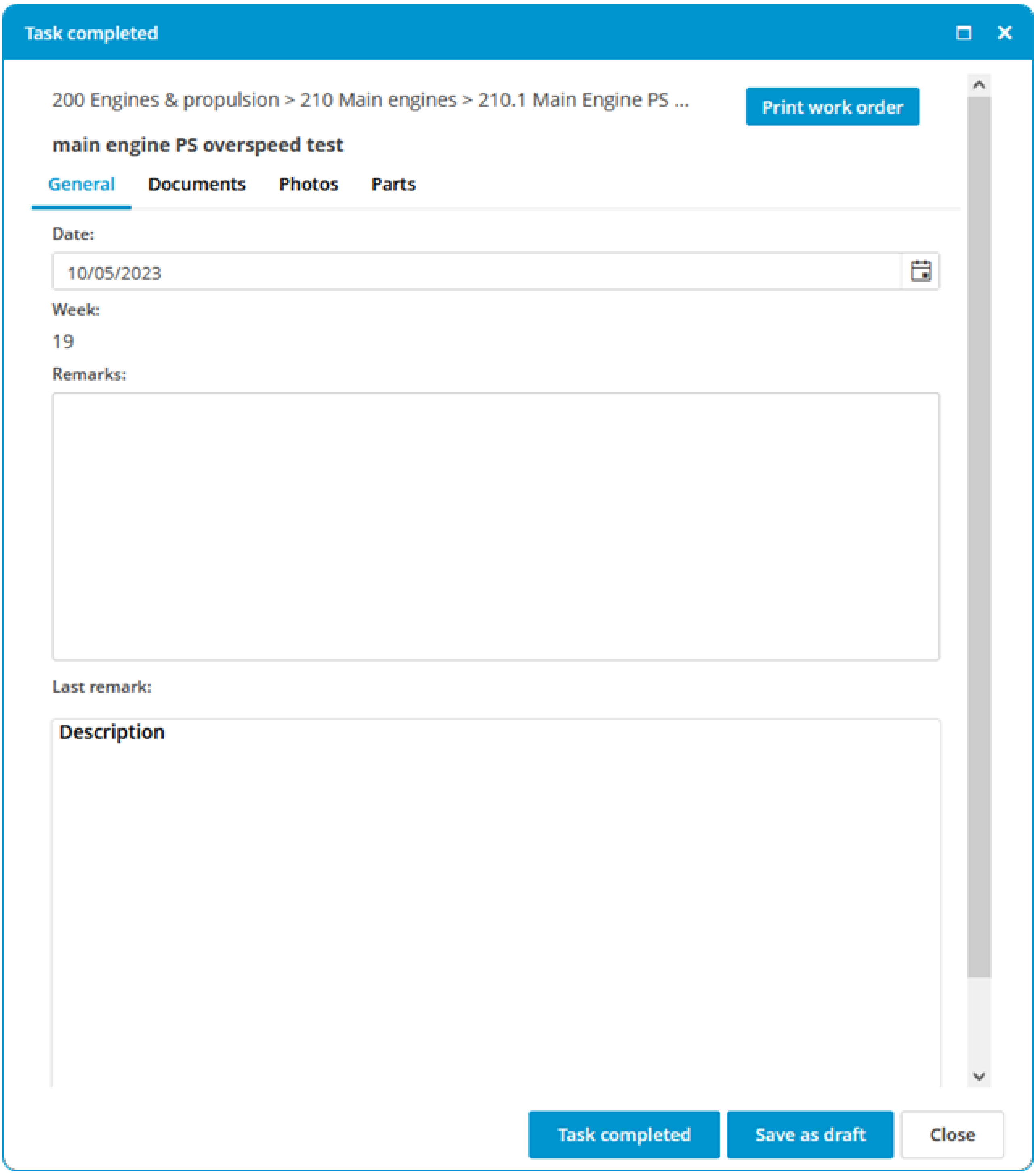
3. Click on **Save & send.**

> If a defect is registered in the category, this defect will also be included in the service request.

How do I mark a task as complete?

A task can be performed from the work list and the module Maintenance.

1. Double-click on a **task.**
2. Enter a **Remark.**



3. Click on **Task completed.**
4. The task will disappear from the work list and will be added back to the list at a predetermined interval.

Optional:

Documents: Here you can add documents to this task completion.
Photos: Here you can add photos to this task completion.
Parts: Here you can add parts to this task completion.

How do I print a work order?

1. Double-click on a **task.**
2. Click on **Print work order.**
3. The **work order** will open in the standard browser.
4. Click on **Print.**

Work order | Mastex Trader

Description: main engine PS overspeed test
Ranks: Chief engineer
Priority: 90,00%

Docu MXSuite | Mastex Trader | IMO 12345678

Work order

Title:	main engine PS overspeed test
Category:	200 Engines & propulsion > 210 Main engines > 210.1 Main Engine PS
Group:	Planned maintenance
dealer:	Pon Power
Manufacturer:	Caterpillar
Type:	3512B
Serial number:	4TN00583
aantal cylinders:	12
RPM:	1800
Color:	yellow
Rated output:	2000 KW
Year of build:	2010
IMO code:	1234567890-098765432
In use:	1
Price:	10000
Planned start:	10/05/2023
Time needed:	
Interval:	6 months
Last done:	14/11/2022

Work description

Date completed:
Actual run time:
Task completed:
Spare parts:
Comment:

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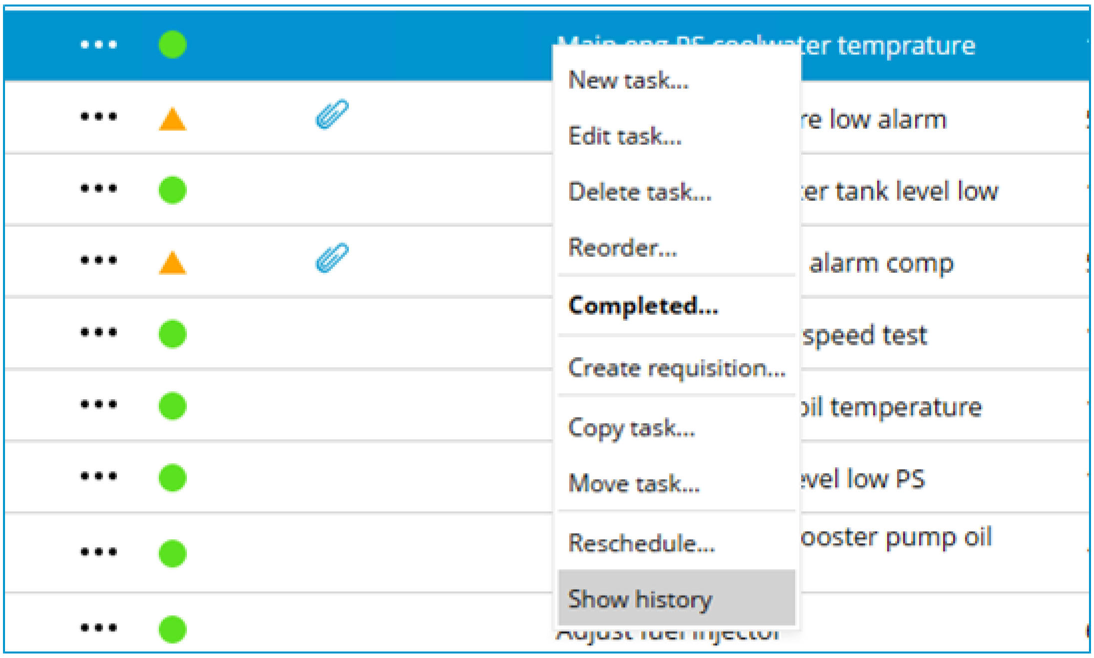
How do I see the history of a task?

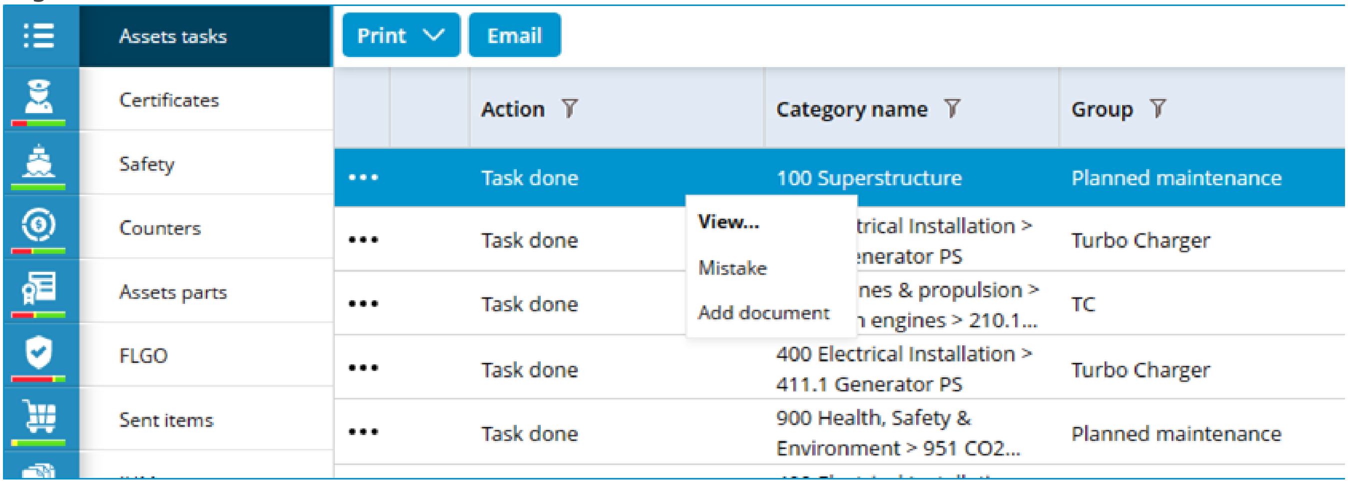
1. Right-click on a task.
2. Select **Show history.**



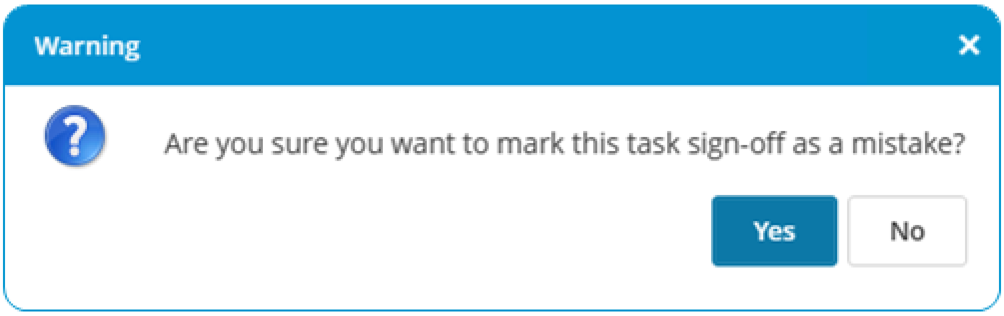
> Right-click on a category, group, or task and select **Show history**. MXSuite will then open the module History and display the data for the selected category, group, or task.

How do I undo a completed task?

1. Go to the module **History.**
2. Select **Assets tasks.**
3. Right-click on the task and select **Mistake.**



4. Confirm the mistake.



5. Click on **Yes**.

For every task only the most recently completed task can be marked as a mistake.

How do I add a document to a completed task?

1. Go to the module **History.**
2. Select **Maintenance.**
3. Click on **Search** to search for the relevant maintenance task.
4. Once you have found the maintenance task, there are two ways to add the document:
   - Right-click on this maintenance task and select **Add document.**
   - Double-click on the line or click **View** and then **New** to add the document.

> The option **Link from documents...** makes it possible to add a document from the module Documents.