

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.

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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.

Group details

General

Related groups

Unique id:

Name:

Budget code:

▼

Group type:

General

▼

Save

Save & close

Close

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

How do I create a new task?

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

Task details

General

Task description

Documents

Photos

Parts

Extra

ID:

Task name:

☐ Project task

☐ Use this task once

☐ Is defect

☐ Counter based

☐ Requires approval

☐ Is at service request

Group:

Budget code:

Scheduling

☐ Fixed Interval

Interval:

Months

Due date:

day/month/year

Warning period:

7

Days

Ranks

Other

Time needed:

Save

Save & close

Close

- 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
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Time interval (default)	<p>Enter an Interval and select day, week or month. The Due Date is calculated based on today's date + interval.</p> <p>Extra option:</p> <ul style="list-style-type: none"> Fixed interval <div> <div>Scheduling</div> <div> <div>Fixed Interval: <input type="checkbox"/></div> <div>Warning period: 7 <input type="text"/> Days <input type="text"/></div> </div> <div> <div>Interval: <input type="text"/> Months <input type="text"/></div> <div>Due date: day/month/year <input type="text"/></div> </div> </div>
Counter based	<p>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.</p> <p>Extra options:</p> <ul style="list-style-type: none"> Fixed interval Maximum interval <p>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.</p> <div> <div>Scheduling</div> <div> <div>Fixed Interval: <input type="checkbox"/></div> <div>Warning period: <input type="text"/> <input type="text"/></div> </div> <div> <div>Interval: <input type="text"/></div> <div>Maximum interval: <input type="text"/> <input type="text"/></div> </div> <div> <div>Counter: <input type="text"/></div> <div>Due counter value: <input type="text"/></div> </div> </div>
Project task	<p>Select if the project task should be added to a selected type of projects.</p> <div> <div>Project types</div> <div>Each Project <input type="text"/></div> </div>
Use this task once / Defect	<p>Select when the task should be performed.</p> <div> <div>Scheduling</div> <div> <div>Due date: day/month/year <input type="text"/></div> <div>Warning period: <input type="text"/> <input type="text"/></div> </div> </div>

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**.

The screenshot shows a 'Task details' dialog box with a blue header bar. Below the header, there are five tabs: 'General' (with a red warning icon), 'Task description' (selected), 'Documents', 'Parts', and 'Extra'. Under the 'Task description' tab, there is a checkbox labeled 'Print task description at work list' which is currently unchecked. Below the checkbox is a rich text editor toolbar with various icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, decrease indent, increase indent, link, unlink, table, and code. Below the toolbar is a large text area for entering the task description. At the bottom of the dialog, there are three buttons: 'Save', 'Save & close', and 'Close'.

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...**

The screenshot shows the 'Task details' dialog box with the 'Documents' tab selected. The dialog has a blue header bar with the title 'Task details' and a close button. Below the header are five tabs: 'General', 'Task description', 'Documents' (active), 'Parts', and 'Extra'. The 'Documents' tab contains a toolbar with three buttons: 'New...', 'Link from documents...', and 'Actions...' with a dropdown arrow. To the right of these buttons is the instruction 'Drag and drop documents in the box below'. Below the toolbar is a table with the following structure:

<input type="checkbox"/>	Name	Size	Linked
No records available.			

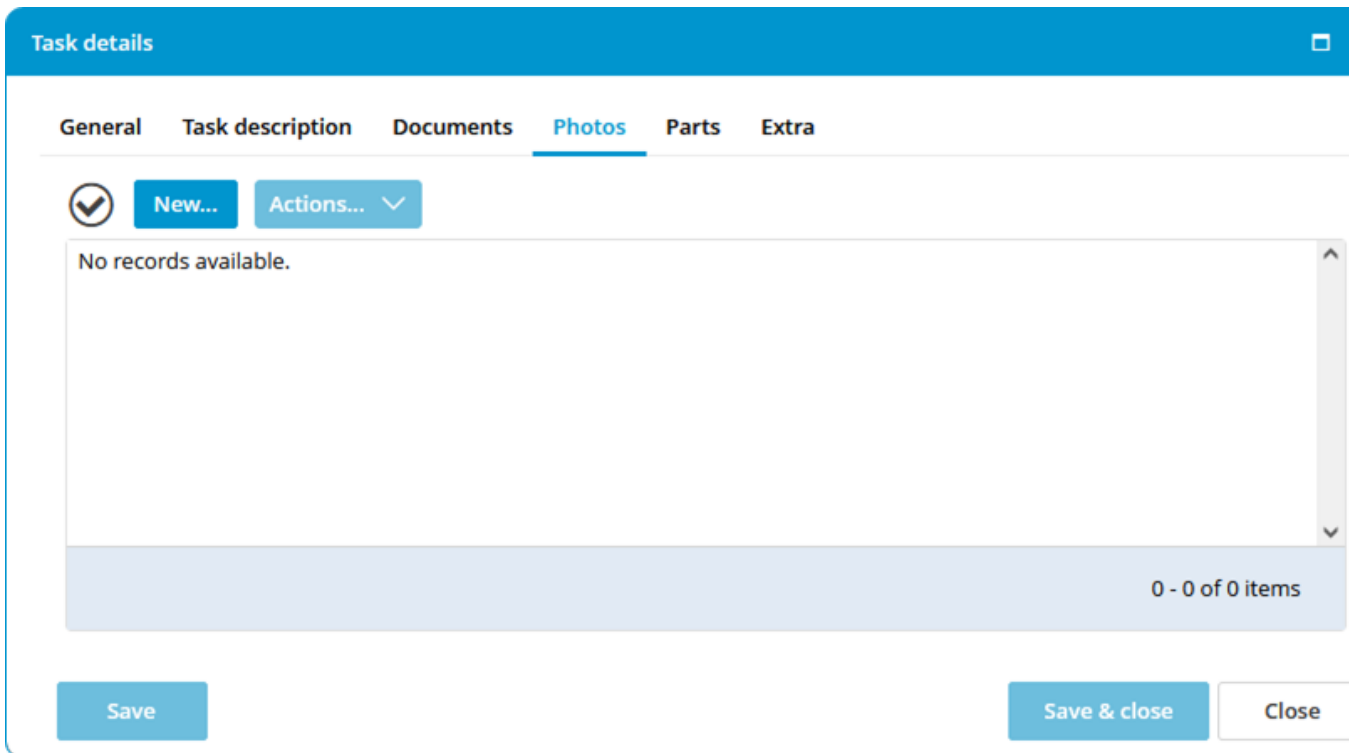
At the bottom of the dialog are three buttons: 'Save', 'Save & close', and 'Close'.

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.

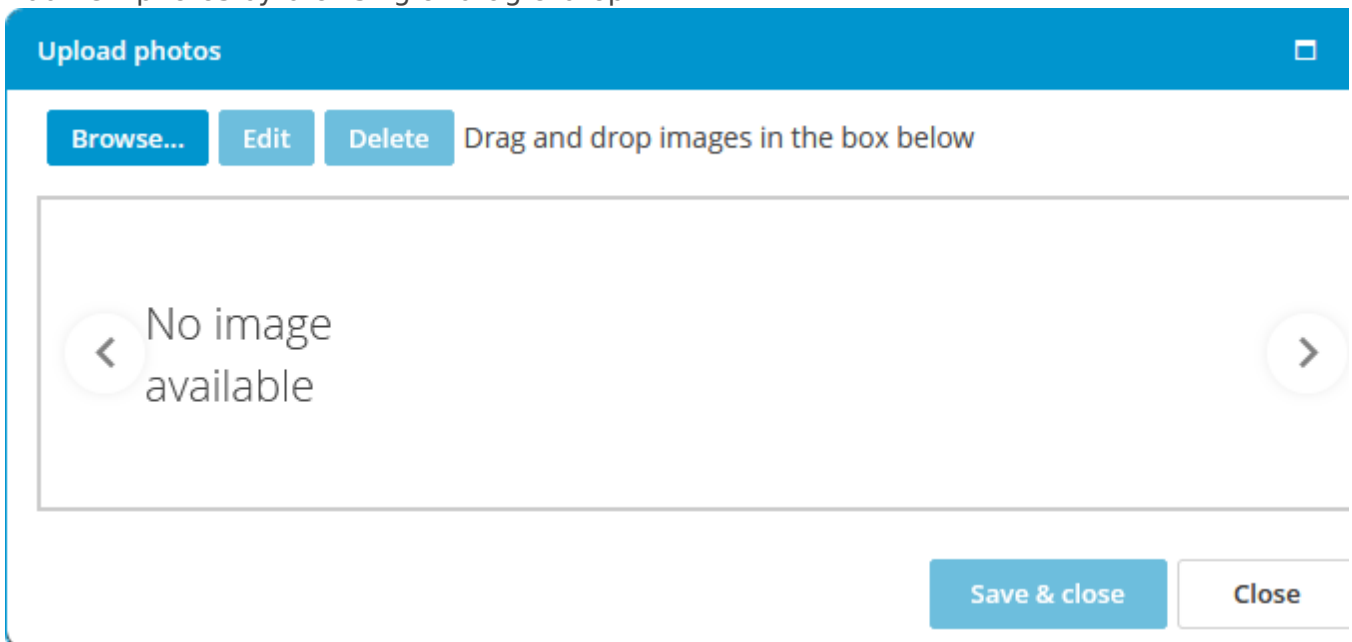
How do I add photos to a task?

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



The screenshot shows the 'Task details' dialog box with the 'Photos' tab selected. The dialog has a blue header bar with the title 'Task details' and a close button. Below the header is a tab bar with 'General', 'Task description', 'Documents', 'Photos' (selected), 'Parts', and 'Extra'. In the 'Photos' tab, there is a 'New...' button, an 'Actions...' dropdown menu, and a large empty box with the text 'No records available.' and a scrollbar. At the bottom right of this box, it says '0 - 0 of 0 items'. At the bottom of the dialog, there are three buttons: 'Save', 'Save & close', and 'Close'.

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



The screenshot shows the 'Upload photos' dialog box. It has a blue header bar with the title 'Upload photos' and a close button. Below the header is a row of buttons: 'Browse...', 'Edit', and 'Delete'. To the right of these buttons is the text 'Drag and drop images in the box below'. Below this is a large empty box with the text 'No image available' and two circular arrows (left and right) on either side. At the bottom right of the dialog, there are two buttons: 'Save & close' and 'Close'.

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)...**

Task part selection

Search...

Inventory

Search...

Show all

► 100 Superstructure

▼ 200 Engines & propu

▼ 210 Main engines

210.1 Main Eng

210.2 Main Eng

► 211 Reduction Gei

214 Propeller Shaf

214.1 Propeller sh.

214.2 Propeller sh.

221 Rudder

221.1 Rudder PS

221.2 Rudder SB

222 Steering gear

223 Bow Thruster

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Part number ▼ ▲	Description ▼	Own code ▼	Actual stock ▼	Budget code ▼
<input type="checkbox"/>	12	Set screw RVS	100.0755	351,00	101 - Engineroom
<input type="checkbox"/>	1234	fuel filter	RG1234	-36,00	100 - Fixed repairs
<input type="checkbox"/>	2080120	Mobilgard HSD 15W40, bulk	100.7675	1.470,00	465 - Lubricants
<input type="checkbox"/>	2S 1251	Control cable	100.0735	-54,00	101 - Engineroom
<input type="checkbox"/>	6V 4718	O-ring	100.0171	-2.408,00	101 - Engineroom
<input type="checkbox"/>	7C 2377	Shaft Assy	100.0136	12,00	101 - Engineroom
<input type="checkbox"/>	8366 40113	Adjusting plate 1,45 mm	100.1085	12,00	101 - Engineroom
<input type="checkbox"/>	ABB Sace 52B 112,,,160A	Circuit Breaker 160 A	100.9106	-2,00	101 - Engineroom
<input type="checkbox"/>	LF 3376	Oil Filter	100.0953	0,00	101 - Engineroom

1

50

items per page

1 - 9 of 9 item

Save & close

Clos

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.

Select parts for requisition

<input checked="" type="checkbox"/>	Part ▲	Quantity	Actual stock	Reserved stock
▼ Check lub oil pressure low alarm				
✓	Fuel Filter	1	65	1
✓	O-ring	600	-2408	604
✓	O-ring blz.261/478	5	430	8
✓	Pakking / O-ring blz.452	3	-4	3

Save & close

Close

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.

Service order MT22-OSO-145

Order line status

Service requisition

General

Order lines

Suppliers

Unique id: MT22-OSO-145

Location: Mastex Trader

Status: Requisition

Creation date: 27/01/2023

Created by: Administrator

Remarks:

Select urgency: Next possible port

Budgeting year: 2023

Delivery port:

Category: 200 Engines & prc

ETA: day/month/year

Delivery address

Invoicing address

Financial

Total amount: 0.00

Local currency: EURO

Currency	Total per currency	Exchange rate
No records available.		

Order line last modified at: 27/01/2023 10:17 by: Administrator

Save as draft

Save & send

Close

- 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**.

The screenshot shows a 'Task completed' dialog box with a blue header bar containing a close button. The breadcrumb path is '200 Engines & propulsion > 210 Main engines > 210.1 Main Engine PS ...'. A 'Print work order' button is in the top right. The task title is 'main engine PS overspeed test'. Below this are tabs for 'General' (selected), 'Documents', 'Photos', and 'Parts'. The 'Date' field shows '10/05/2023' with a calendar icon. The 'Week' field shows '19'. The 'Remarks' field is a large empty text area. The 'Last remark:' section has a 'Description' label and a large empty text area. At the bottom are three buttons: 'Task completed' (blue), 'Save as draft' (blue), and 'Close' (white).

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.

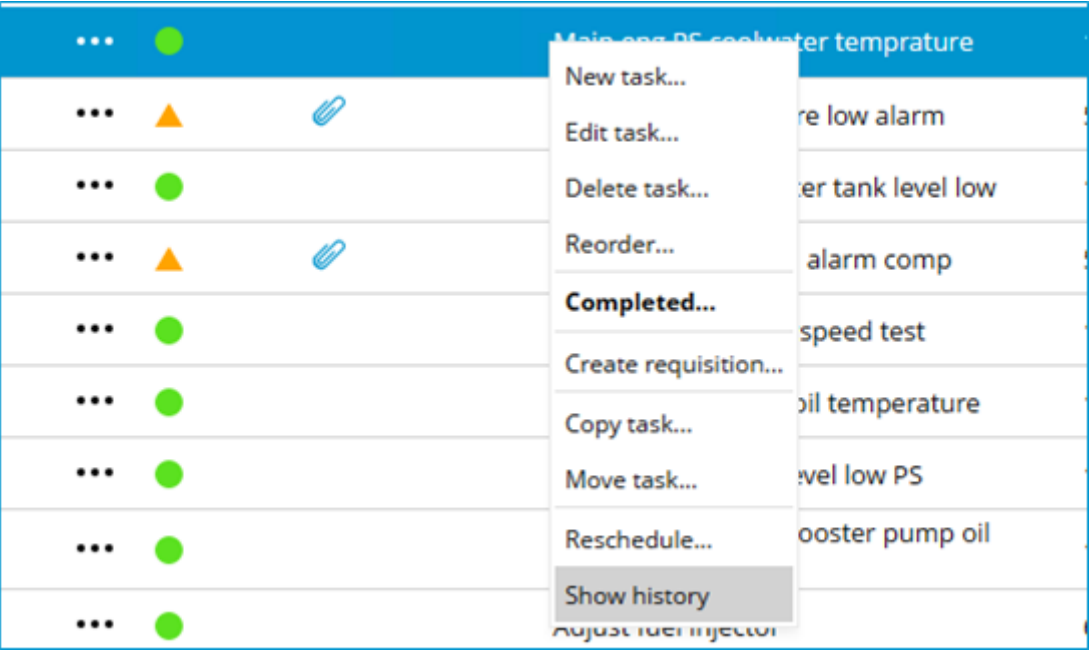
How do I print a work order?

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**.

Assets tasks	Print	Email
Certificates		
Safety	...	Task done
Counters	...	Task done
Assets parts	...	Task done
FLGO	...	Task done
Sent items	...	Task done

View...

Mistake

Add document

Action	Category name	Group
100 Superstructure	Planned maintenance	
Electrical Installation > generator PS	Turbo Charger	
nes & propulsion > engines > 210.1...	TC	
400 Electrical Installation > 411.1 Generator PS	Turbo Charger	
900 Health, Safety & Environment > 951 CO2...	Planned maintenance	

- 4. Confirm the mistake.

Warning

?

Are you sure you want to mark this task sign-off as a mistake?

YesNo

- 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.