

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 ▼

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 Is at service request
 Counter based
 Requires approval

Group: Budget code:

Scheduling
 Fixed Interval
Interval: Months
Due date:
Warning period: Days

Ranks

Other
Time needed:

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 data-bbox="815 349 1485 461"> <p>Scheduling</p> <p>Fixed Interval: <input type="checkbox"/> Warning period: 7 <input type="text"/> Days <input type="text"/></p> <p>Interval: <input type="text"/> Months <input type="text"/></p> <p>Due date: <input type="text"/> <input type="text"/></p> </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 data-bbox="815 871 1485 1043"> <p>Scheduling</p> <p>Fixed Interval: <input type="checkbox"/> Warning period: <input type="text"/> <input type="text"/></p> <p>Interval: <input type="text"/></p> <p>Maximum interval: <input type="text"/> <input type="text"/></p> <p>Counter: <input type="text"/></p> <p>Due counter value: <input type="text"/></p> </div>
Project task	<p>Select if the project task should be added to a selected type of projects.</p> <div data-bbox="815 1173 1485 1234"> <p>Project types</p> <p>Each Project <input type="text"/></p> </div>
Use this task once / Defect	<p>Select when the task should be performed.</p> <div data-bbox="815 1330 1485 1379"> <p>Scheduling</p> <p>Due date: <input type="text"/> <input type="text"/> Warning period: <input type="text"/> <input type="text"/></p> </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.

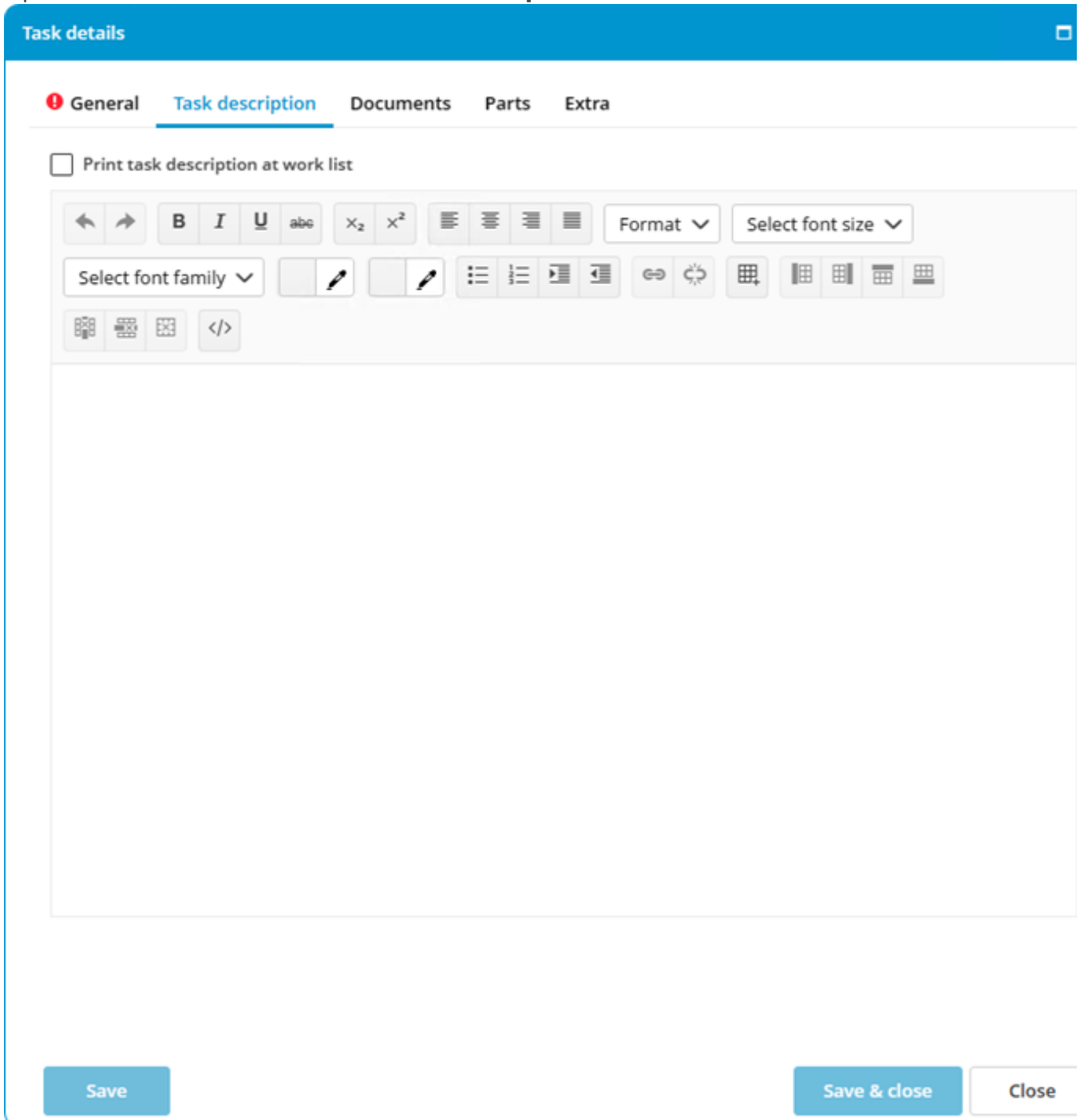


It is possible to select multiple ranks which can approve this task.



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

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

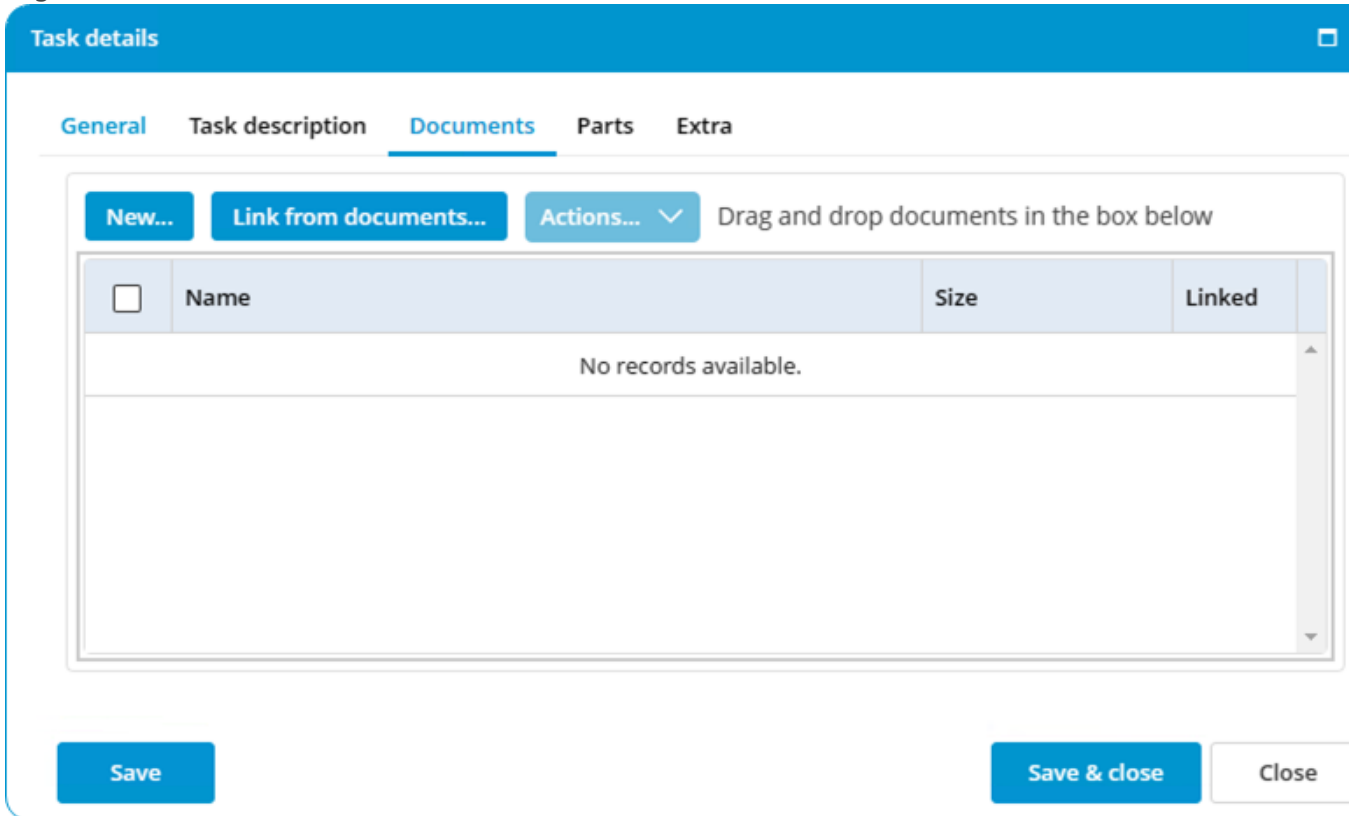


The screenshot shows a 'Task details' dialog box with a blue header bar. Below the header, there are five tabs: 'General' (with a red error icon), 'Task description' (selected), 'Documents', 'Parts', and 'Extra'. Under the 'Task description' tab, there is a checkbox labeled 'Print task description at 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, subscript, superscript, bulleted list, numbered list, indent, outdent, link, unlink, table, table border, table border style, and code. Below the toolbar is a large empty 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 with a close button. Below the header are tabs for 'General', 'Task description', 'Documents', 'Parts', and 'Extra'. The 'Documents' tab contains a toolbar with 'New...', 'Link from documents...', and 'Actions...' buttons, followed by the instruction 'Drag and drop documents in the box below'. Below the toolbar is a table with columns 'Name', 'Size', and 'Linked'. The table is currently empty, displaying 'No records available.' at the bottom. At the bottom of the dialog are three buttons: 'Save', 'Save & close', and 'Close'.

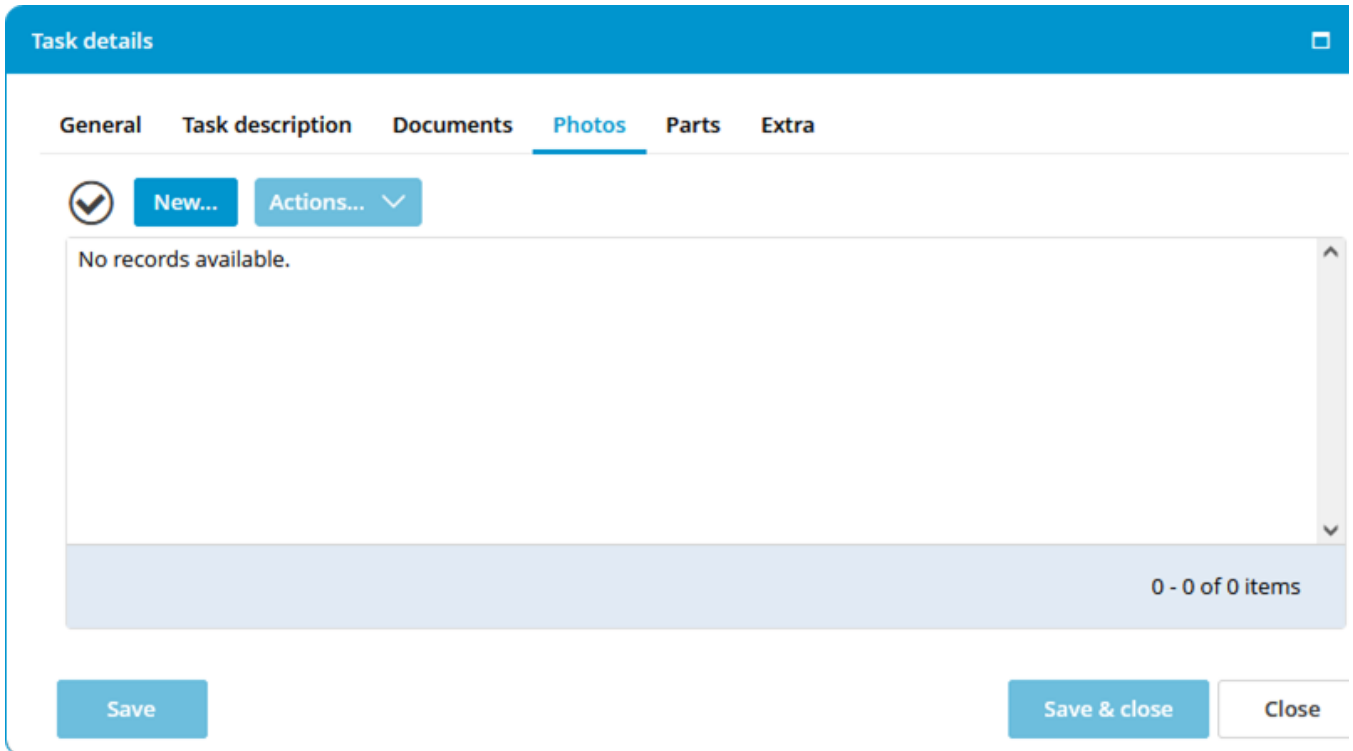
<input type="checkbox"/>	Name	Size	Linked
No records available.			

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

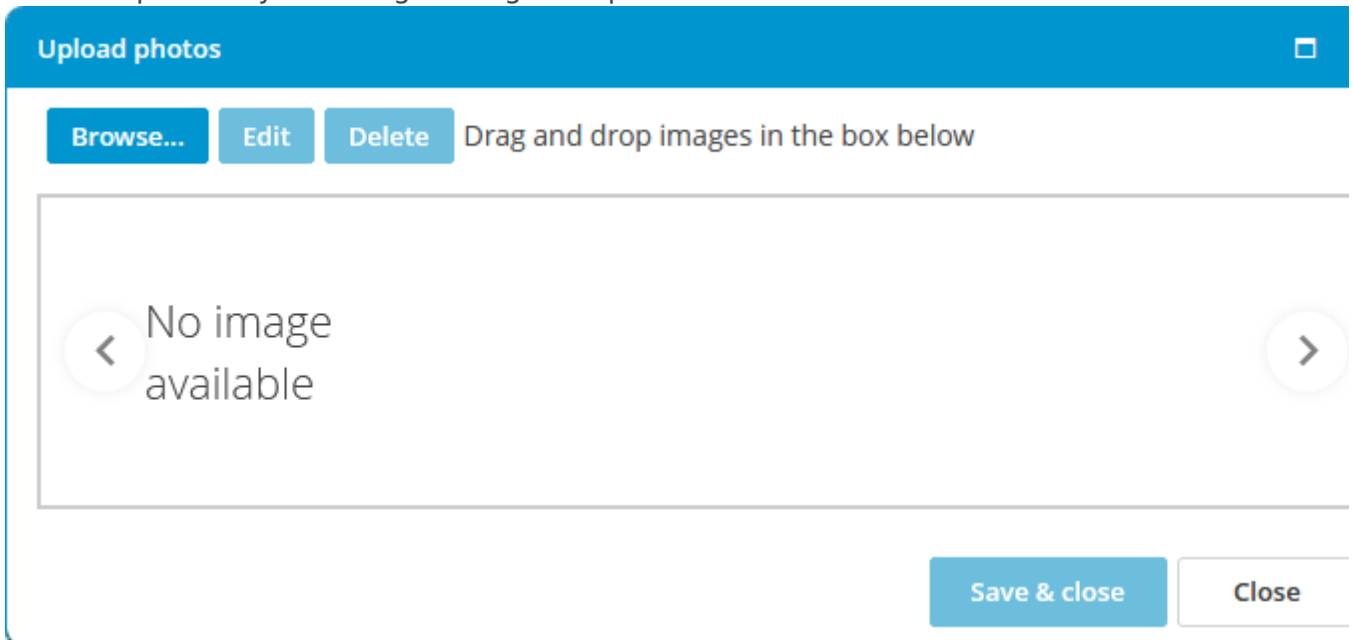
The option **Link from documents...** makes it possible to add a document from the module Documents.

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)...**

The screenshot shows the 'Task part selection' window. On the left is a tree view with the following structure:

- 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

The main table has the following data:

<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 S2B 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

At the bottom of the table, there is a pagination control showing '1' selected, '50' items per page, and '1 - 9 of 9 item'. A 'Save & close' button is located at the bottom right of the window.

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

Order line status _____

General Order lines Suppliers

Unique id: MT22-OSO-145 Select urgency: Next possible port Budgeting year: 2023

Location: Mastex Trader Delivery port: Category: 200 Engines & prc

Status: Requisition ETA: day/month/year

Creation date: 27/01/2023

Created by: Administrator

Remarks:

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

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**.

Task completed

200 Engines & propulsion > 210 Main engines > 210.1 Main Engine PS ... [Print work order](#)

main engine PS overspeed test

[General](#) [Documents](#) [Photos](#) [Parts](#)

Date:
10/05/2023

Week:
19

Remarks:

Last remark:

Description

[Task completed](#) [Save as draft](#) [Close](#)

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:

27/01/2023
121.058 v4.3

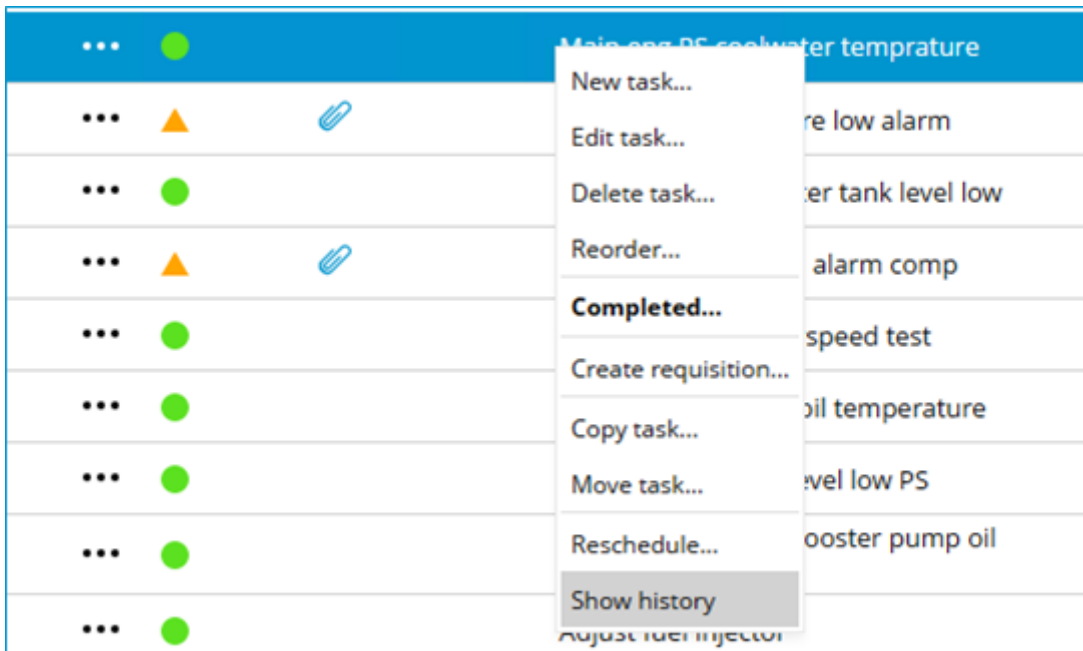
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How do I see the history of a task?

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



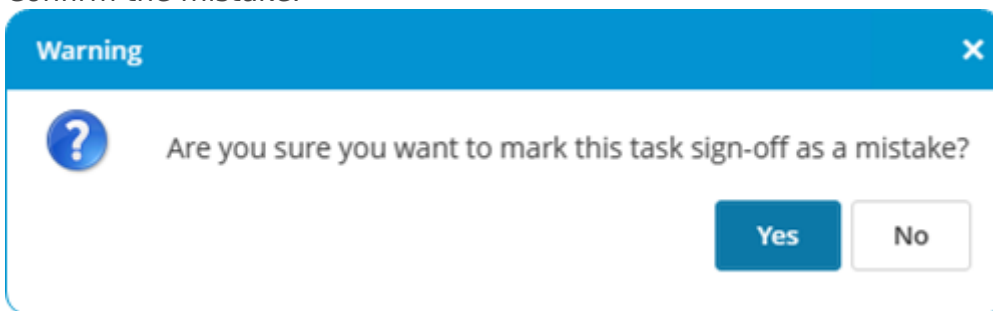
Right-click on a category, group, or task and select **Show history**. MXSuite will then open the module History and display the data for the selected category, group, or task.

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

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.