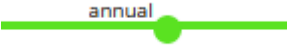







Certificates

The expiration date of certificates can be monitored and managed in the module Certificates. Certificates are subdivided into groups. Groups can be selected within the sidebar on the left.

- [What do the symbols mean?](#)
- [How do I create a new certificate?](#)
- [How do I reorder categories?](#)
- [How do I reorder certificates?](#)
- [How do I mark a survey as completed?](#)
- [How do I copy all certificates in a category?](#)
- [How do I email certificates?](#)

What do the symbols mean?

| Symbol | Explanation |
|--|--|
|  | The green ball indicates that a survey or certificate needs to be updated in this period. At the moment, no additional actions are required. |
|  | The green ball with the curl indicates that this survey has been performed. This survey has been included in the history tab. |
|  | The orange triangle indicates that the survey or certificate renewal is currently in the window period and therefore needs your attention. |
|  | The red diamond indicates that a survey or certificate needs to be renewed and actually is overdue. |
|  | The line to the left of a symbol indicates the window period before the survey or certificate renewal. The length of the line indicates the number of months in this period. |
|  | This certificate has expired and the due date is not in the current view. |

How do I create a new certificate?

1. Click on **New**.
2. Select the **Certificate type**.

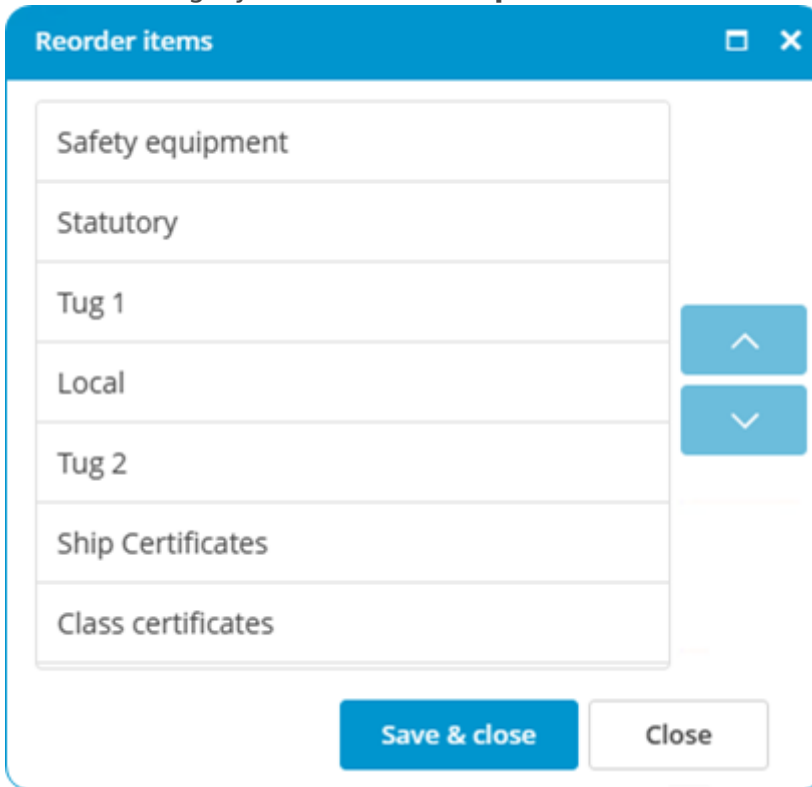
The screenshot shows a 'Certificate details' window with three tabs: 'General', 'Documents', and 'Forms'. The 'General' tab is active. Under 'Certificate type', there are three options: 'Annual' (checked), 'Intermediate', and 'None'. Each option has a 'Months' dropdown, a 'before' field with a spinner, an 'after' field with a spinner, and a 'before renewal' field. The 'Annual' option has '3' in the 'before' field. The 'Intermediate' option has '6' in the 'before' field. The 'None' option has '3' in the 'before' field. Below this, there are fields for 'Certificate number', 'Certificate name', 'Renewal after' (with a spinner and a 'Years' dropdown), 'Category' (set to 'Safety equipment'), 'Issued by', and 'Date of issue' (set to 'day/month/year'). There are also 'Storage' and 'Comments' text areas. At the bottom, there are 'Save', 'Save & close', and 'Close' buttons.

- **Annual:** A survey will be planned annually for this certificate.
 - **Intermediate:** A survey will be planned for some time between the date of issue and the date of expiry.
 - **None:** Use this type when no intermediate surveys are required.
3. Complete all required fields.
 4. Click on **Save & close**.

If a certificate is entered with an issue date but without an expiry date, enter a 0 in **Renewal after**. This will remove the expiry date from the screen.

How do I reorder categories?

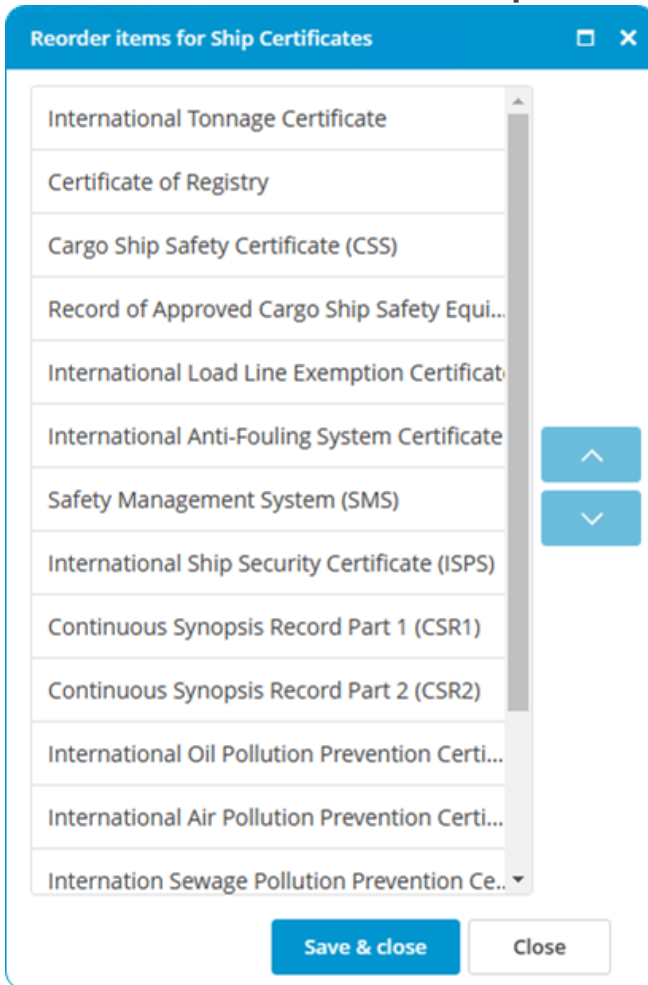
1. Right-click on a **Category** and select **Reorder certificate categories...**
2. Select a category and use **Move up** and **Move down** to change the order.



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

How do I reorder certificates?

1. Right-click on a **Certificate** and select the option **Reorder certificate items...**
2. Select a certificate and use **Move up** and **Move down** to change the order.



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

How do I mark a survey as completed?

1. In the timeline of the certificate you want to extend, double-click on the symbol (this is only possible if the colour is orange or red) or right-click on the symbol and select **Endorsement...**
2. Complete all required fields.

Certificate operation Forms

Surveyor:

Place:

Date: 22/02/2023

Time window:

Comments:

Documents

New... Link from documents... Actions... ▾

Drag and drop documents in the box below

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

Save & close Close

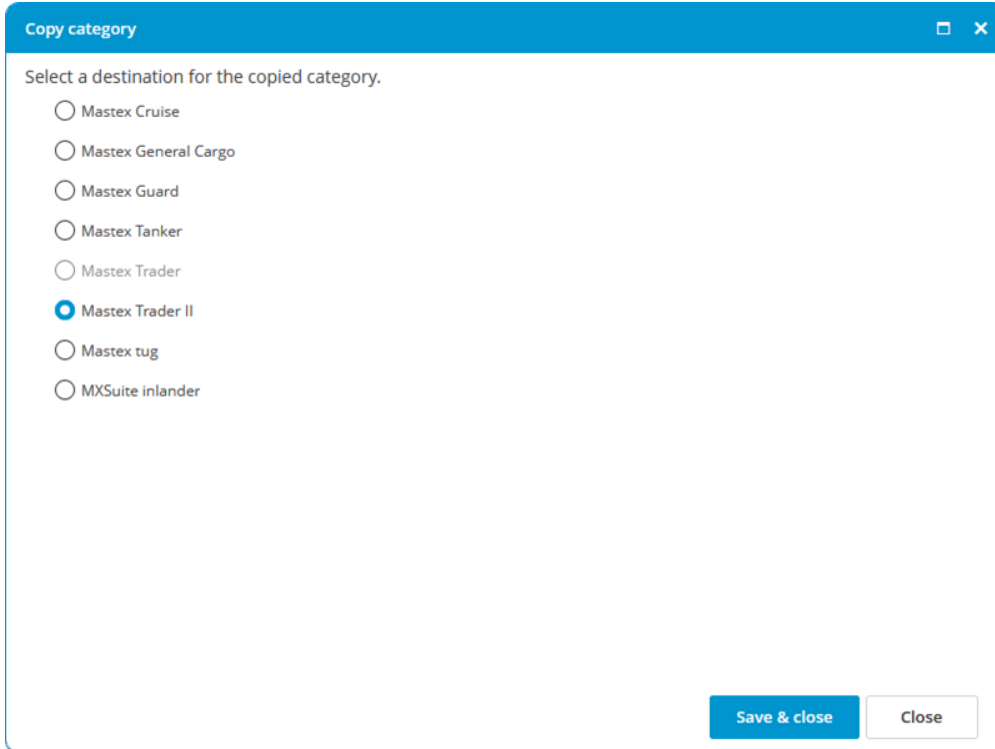
3. Select the annual or intermediate survey that has been completed.
4. Click on **Save & close**.

After extending the certificate, a green ball with a curl will appear.

When carrying out a survey, select the option **Extra survey** to save an interim survey in the certificate history.

How do I copy all certificates in a category?

1. Right-click a certificate category and click **Copy...**
2. Select the location where you want to copy the certificate category to.



3. Click **Save & Close.**

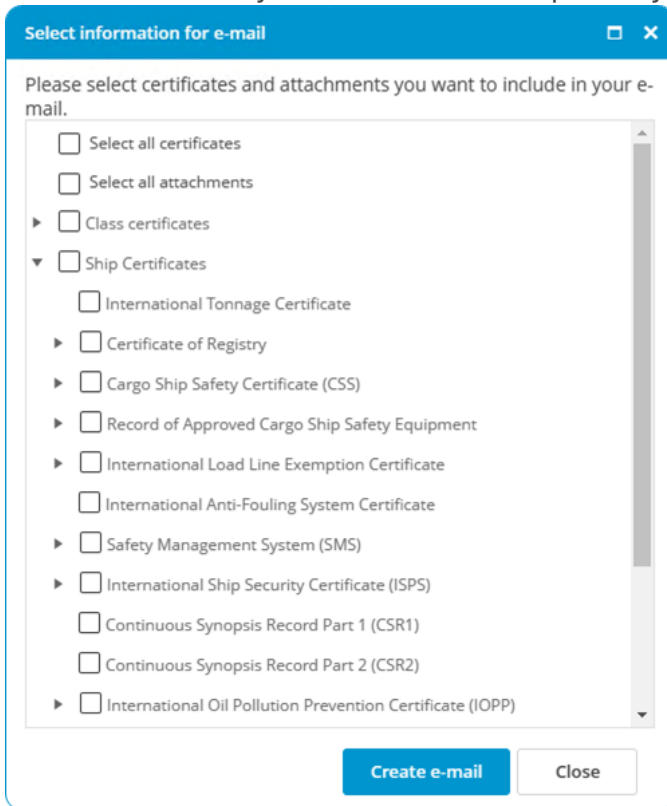
The history of the certificates will also be copied.

A location is not displayed during the copying process if:

- the destination has no module Certificates.
- the source has a docking certificate and the destination does not.

How do I email certificates?

1. Click on **Email...**
2. Select the email you want to send. You can select all certificates and all attachments at the same time or you can add them separately.



The screenshot shows a dialog box titled "Select information for e-mail" with a close button (X) in the top right corner. The main text inside the dialog reads: "Please select certificates and attachments you want to include in your e-mail." Below this text is a list of checkboxes and expandable/collapsible items. The items are: "Select all certificates" (checkbox), "Select all attachments" (checkbox), "Class certificates" (checkbox with right-pointing triangle), "Ship Certificates" (checkbox with downward-pointing triangle), "International Tonnage Certificate" (checkbox), "Certificate of Registry" (checkbox with right-pointing triangle), "Cargo Ship Safety Certificate (CSS)" (checkbox with right-pointing triangle), "Record of Approved Cargo Ship Safety Equipment" (checkbox with right-pointing triangle), "International Load Line Exemption Certificate" (checkbox with right-pointing triangle), "International Anti-Fouling System Certificate" (checkbox), "Safety Management System (SMS)" (checkbox with right-pointing triangle), "International Ship Security Certificate (ISPS)" (checkbox with right-pointing triangle), "Continuous Synopsis Record Part 1 (CSR1)" (checkbox), "Continuous Synopsis Record Part 2 (CSR2)" (checkbox), and "International Oil Pollution Prevention Certificate (IOPP)" (checkbox with right-pointing triangle). At the bottom of the dialog, there are two buttons: "Create e-mail" (a blue button) and "Close" (a white button with a grey border).

3. Click on **Create e-mail.**
4. The generated email will be downloaded or shown in MXSuite (depends on configuration).