

# Documents

In the module Documents, documents can be easily managed and synchronised across the entire fleet to ensure that ships have instant access to accurate documentation.

Documents can also be created based on a template, to ensure that all created documents follow the right layout. User forms can also be created in this module.

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# How do I create a new document category?

1. Click **New Category...** or right-click on an empty part of the tree structure and select **New...**
2. Complete all required fields.

**Document category details**

Name:

Parent category:

**Custom attributes**

ID:

No file selected.

Picture:

auto nr: 17

**Visible for user groups**

<input checked="" type="checkbox"/> Select all	
<input checked="" type="checkbox"/> Technical Dep...	Viewer
<input checked="" type="checkbox"/> Officer	Viewer
<input checked="" type="checkbox"/> Captain	Viewer
<input checked="" type="checkbox"/> Chief engineer	Viewer
<input checked="" type="checkbox"/> Office	Viewer
<input checked="" type="checkbox"/> Superintendent	Viewer
<input checked="" type="checkbox"/> Engineers	Viewer
<input checked="" type="checkbox"/> Crew WAV	Viewer
<input checked="" type="checkbox"/> Administrator	Viewer
<input checked="" type="checkbox"/> Only defects	Viewer

**Visible for locations**

☒ Select all

<input type="checkbox"/> Mastex Cruise
<input type="checkbox"/> Mastex General Cargo
<input type="checkbox"/> Mastex Guard
<input type="checkbox"/> Mastex Tanker
<input type="checkbox"/> Mastex Trader
<input type="checkbox"/> Mastex Trader II
<input checked="" type="checkbox"/> Mastex tug
<input type="checkbox"/> MXSuite inlander

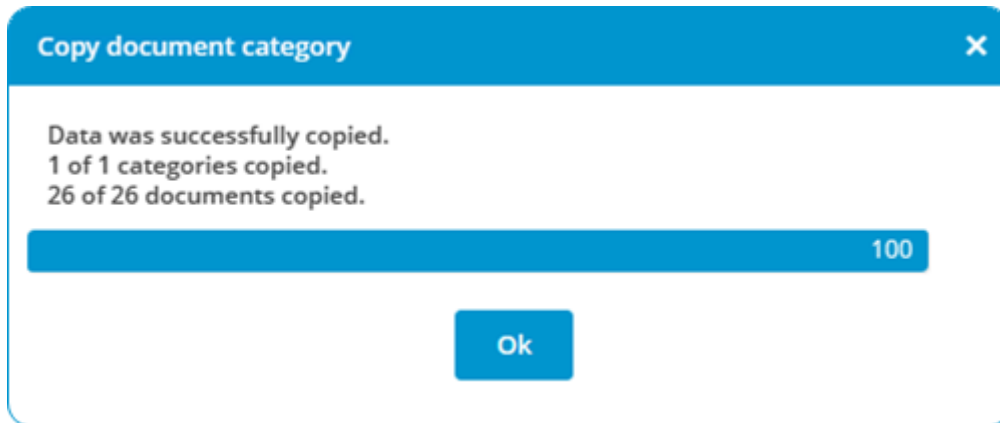
**Save** **Save & close** **Close**

3. In the middle column, select the **user groups** that can view this new category and assign the desired rights.
4. In the right column, select the **locations** that can view this category.
5. Click on **Save & close**.

Right-click on an existing category and then click **New...** to fill the above category.

# How do I copy a category?

1. Right-click on the category and select **Copy**.
2. Select the location you want to copy the category to.
3. Right-click on the category and select **Paste**.
4. A new category will be created with the copied documents. The pop-up window shows how many documents and categories have been copied.



# How do I assign roles to categories?

1. Right-click on a document category and select **Edit...**
2. In the central column (**visible for user groups**) you can select a role per user group.

Document category details

Name:

Parent category:  

Reports

Visible for locations:  

Mastex Trader

Custom attributes

ID:

name:

test:

Picture:

auto nr:  
32

Visible for user groups

☒ Select all

☒ Administrator  

Administrator

☒ Captain  

Editor

☒ Chief engineer  

Creator

☒ Engineers  

Viewer

☒ Office  

Viewer

☒ Officer  

Viewer

☒ Only defects  

Viewer

☒ Superintendent  

Viewer

☒ Technical Department  

Viewer

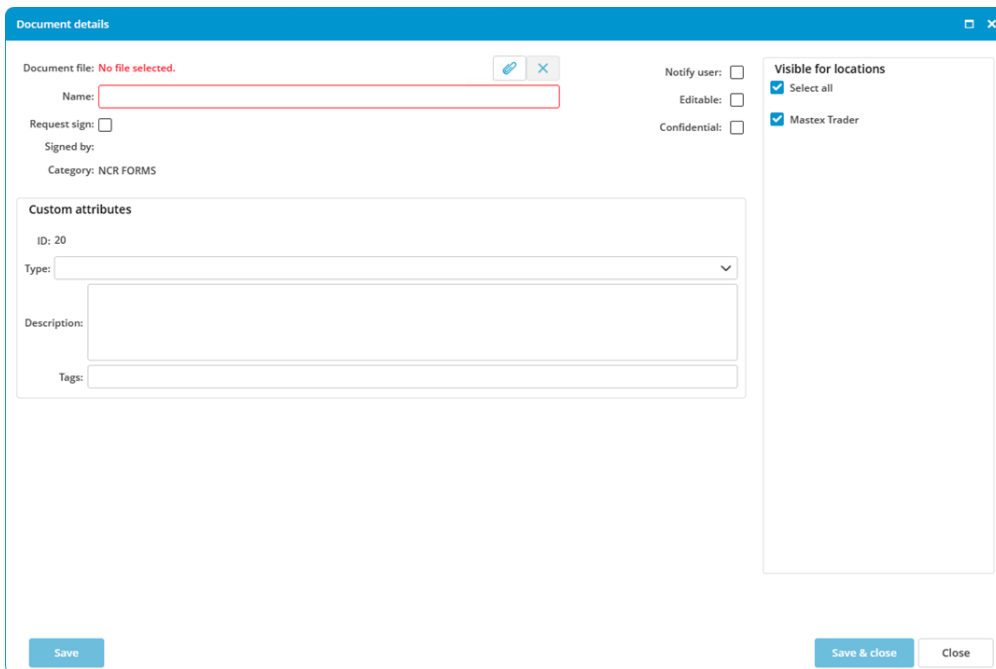
Save

Save & close

Close

# How do I create a new document?


1. Click on **New document**.



The screenshot shows a 'Document details' window with the following fields and options:

- Document file:** No file selected. (with edit and delete icons)
- Name:** A text input field with a red border.
- Request sign:** ☐
- Signed by:** A text input field.
- Category:** NCR FORMS
- Custom attributes:**
  - ID:** 20
  - Type:** A dropdown menu.
  - Description:** A large text area.
  - Tags:** A text input field.
- Notify user:** ☐
- Editable:** ☐
- Confidential:** ☐
- Visible for locations:**
  - ☒ Select all
  - ☒ Mastex Trader

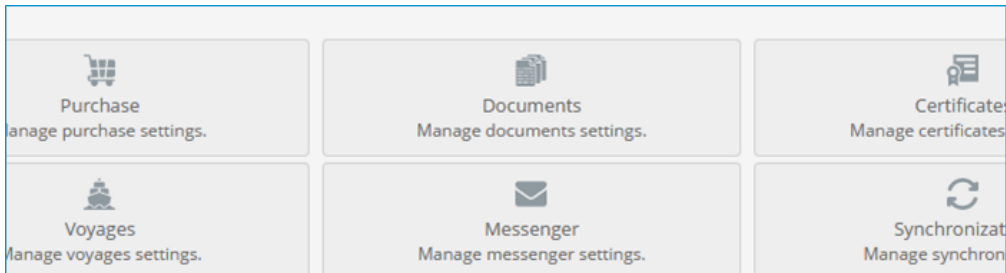
At the bottom, there are three buttons: 'Save', 'Save & close', and 'Close'.

2. Click on  to select the **document**.
3. Enter or edit the **Name**. The name of the document will be automatically generated based on the chosen document.
4. In the right column, select the **locations** for which the document should be visible.
5. Complete all required fields.
6. Click on **Save & close**.

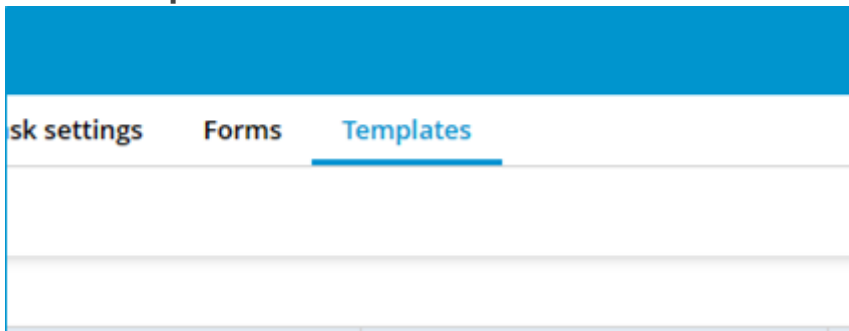
- **Description:** Enter a description of the document.
- **Tags:** To be able to search for certain words using the search function.
- **Confidential:** Indicate whether this is a confidential document. Only authorised users will have access to this document. This document will not appear in the list for non-authorised users.
- **Sign:** If the document has to be signed before it can be opened, select this option. In order to open the document, the user will first be prompted to enter the password.
- **Notify user:** The user will be notified of any changes to the document when starting MXSuite.
- **Editable:** Select this option if the document needs to be edited. This makes it possible to edit the document at a later date and save it in the database.

# How do I create a template?

1. Click on **Administration** in the sidebar.
2. Select **Documents**.




3. Select **Templates**.



4. In the screen Manage templates, click on **New...** You can now enter the basic information from the new template.

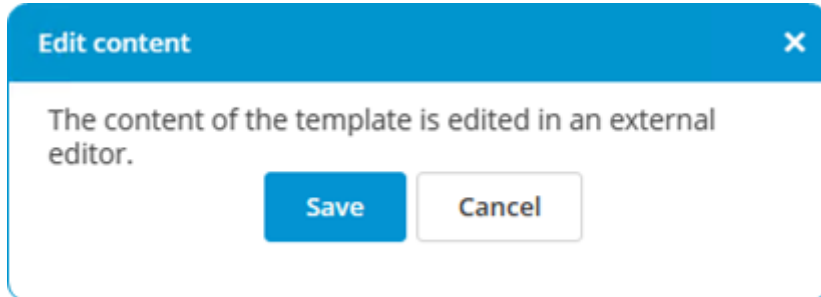
A screenshot of the 'Template details' form. It has a blue header bar. The form is divided into several sections: 'Document file' (with a red error message 'No file selected.' and a file selection icon), 'Name' (a text input field), 'Confidential' (a checkbox), 'Notify user' (a checkbox), 'Custom attributes' (with fields for 'ID: 20', 'Type' (a dropdown menu), 'Description' (a text area), and 'Tags' (a text input field)), 'Categories' (a list of checkboxes including 'Select all', '100 Rules', 'RPR', 'Manuals', 'Equipment manuals', 'ISM', 'NCR FORMS', 'Fire drills', 'Archive', 'Reports', 'Non Conformity Reports', 'Incident report', 'Near miss', 'Noon reports', 'Arrival reports', 'Departure reports', 'Inventory', 'Document', '900 Webinar', and 'NCR FORMS'), 'Locations' (a list of checkboxes including 'Select all', 'Mastex Cruise', 'Mastex General Ca...', 'Mastex Guard', 'Mastex Tanker', 'Mastex Trader', 'Mastex Trader II', 'Mastex tug', and 'MXSuite inlander'), and 'User groups' (a list of checkboxes including 'Select all', 'Technical Departm...', 'Officer', 'Captain', 'Chief engineer', 'Office', 'Superintendent', 'Engineers', 'Crew WAV', 'Administrator', and 'Only defects'). At the bottom, there are three buttons: 'Save', 'Save & close', and 'Close'.

5. Click on  to link the document.
6. Enter the **Name** for the template.
7. Select the **Categories** for which the template can be used.
8. Select the **Locations** that can use the template.
9. Select the **User groups** that can use the template.
10. Click on **Save & close** to create the template.



# How do I edit a template?

1. Right-click on the template and select **Edit template...**
2. The template can now be edited in an external editor
3. Save the file in the external editor and close the editor





# How do I create a document based on a template?

1. Click on **New template document**.
2. Select a template from the drop-down menu.
3. Complete all required fields.
4. Select the location in which the document has to be visible.
5. Click on **Save & close** to create a document based on the template.

# How do I complete a form?

1. Click on **New form** and select the desired form.
2. Enter at a minimum the mandatory fields.
3. Select the location(s) where the form should be displayed.
4. Click on **Save and close** to create the form.
5. Enter at a minimum the mandatory fields.
6. Click on **Save & close.**

# How do I make a form 'read only'?

1. Right-click on the form.
2. Select **Edit properties...**
3. Select the option **Is closed**.

You may find that the option **Is closed** is not visible after step 2. In that case, click on **More details >>** and go to step 3.

Only users with the authorization **Allowed to reopen forms** may reopen the form.

# How do I delete a document?

1. Right-click on the relevant document in the document list and select **Delete...**
2. Select the location from which the document should be deleted.
3. Click on **Ok**.
4. Choose **Select all** to delete the document from the office version as well.

Select appropriate delete action

Please specify if you want to keep the document only at office or you want to delete it competely.

Delete also from office

Keep at office

Cancel

# What is the difference between duplicate and copy?

When you **duplicate** a document or category, they can only be copied in the same category.

When you **copy** a document or category, you can also copy them to another category.

# How do I obtain editing rights?

To prevent discrepancies in the content of a document, an editable document cannot be edited at multiple locations at the same time. This means it can either be edited in the office or on the ship. If the menu option **Edit document** is not available, editing rights must be requested.

1. Right-click on the document.
2. Select the option **Request edit**.

This request will be sent via synchronisation to the location that currently has editing rights. A subsequent synchronisation will accept the request and grant editing rights.

The location that adds the document in MXSuite has editing rights by default.

# How do I see what happened to a document?

1. Right-click on a document.
2. Select **View log...**

Document Log

Print

Email

Default view

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

Location	User	Operation	Performed by office
Mastex Trader	Administrator	Create	✓
Mastex Trader	Administrator	EditContent	✓
Mastex Trader	Administrator	Publish	✓
Mastex Trader	Administrator	Read	✓
Mastex Trader	Administrator	Edit	
Mastex Trader	Administrator	Edit	✓

1

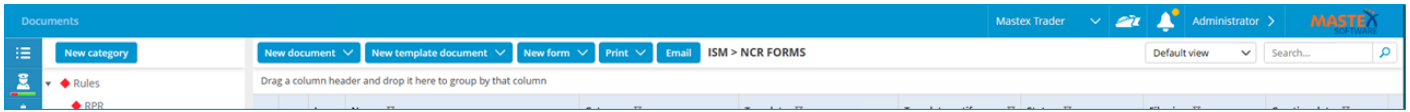
50 items per page

1 - 6 of 6 items

Close

# How do I search for a document?

1. Enter a search term into **Search...**
2. All documents that contain the search term will be displayed.



The search will be carried out at all locations. The search can be specified by selecting a specific view option or category.

Only the document properties are searched (e.g. name, description, tags, etc.), not the document content.



# How do I create a document task?

1. Right-click on the document and select **Add task**.

**Task details**

**General** | Notes

ID: 15

Document: [Demo during MXSuite presentation PrimeTransport](#)

Date created: 22/02/2023

Due date:

Description:

Private: ☐

Confidential: ☐

Assigned to:

Status:

**Save** **Save & close** **Close**

2. Enter the fields **Due date** and **Description**.
3. Assign the task to a user.
4. Select the **Status**.
5. Click on **Save & close**.

**Private:** only visible by this person; not synchronized to the ship.

**Confidential:** only visible to the authorized user group.