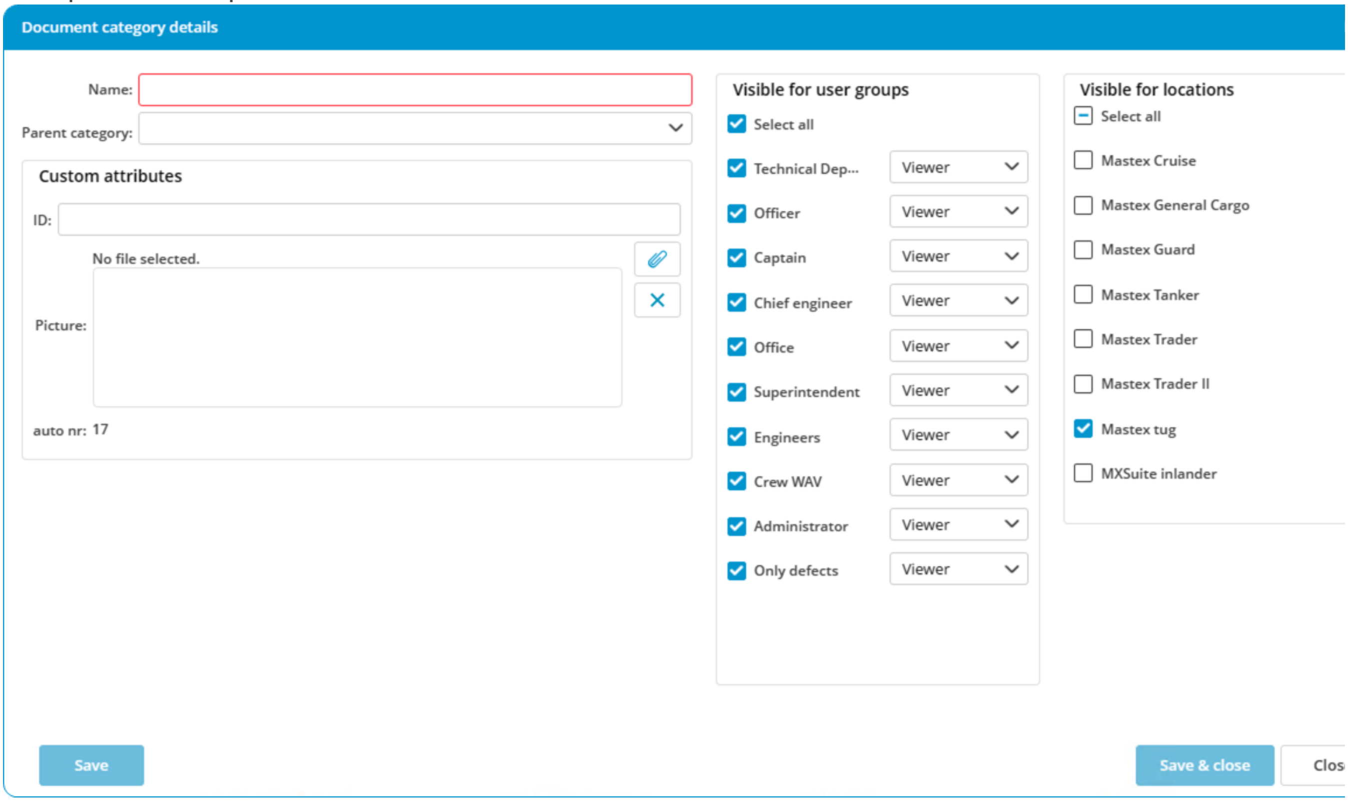
Documents

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.

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.

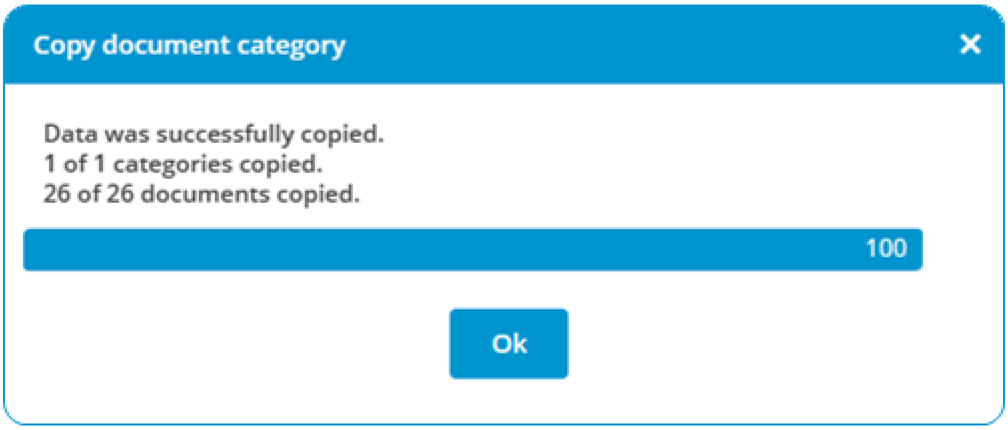


3. In the middle column, select the **user groups** that can view this new category and assign the desired rights.
4. In the right column, select the **locations** that can view this category.
5. Click on **Save & close.**

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

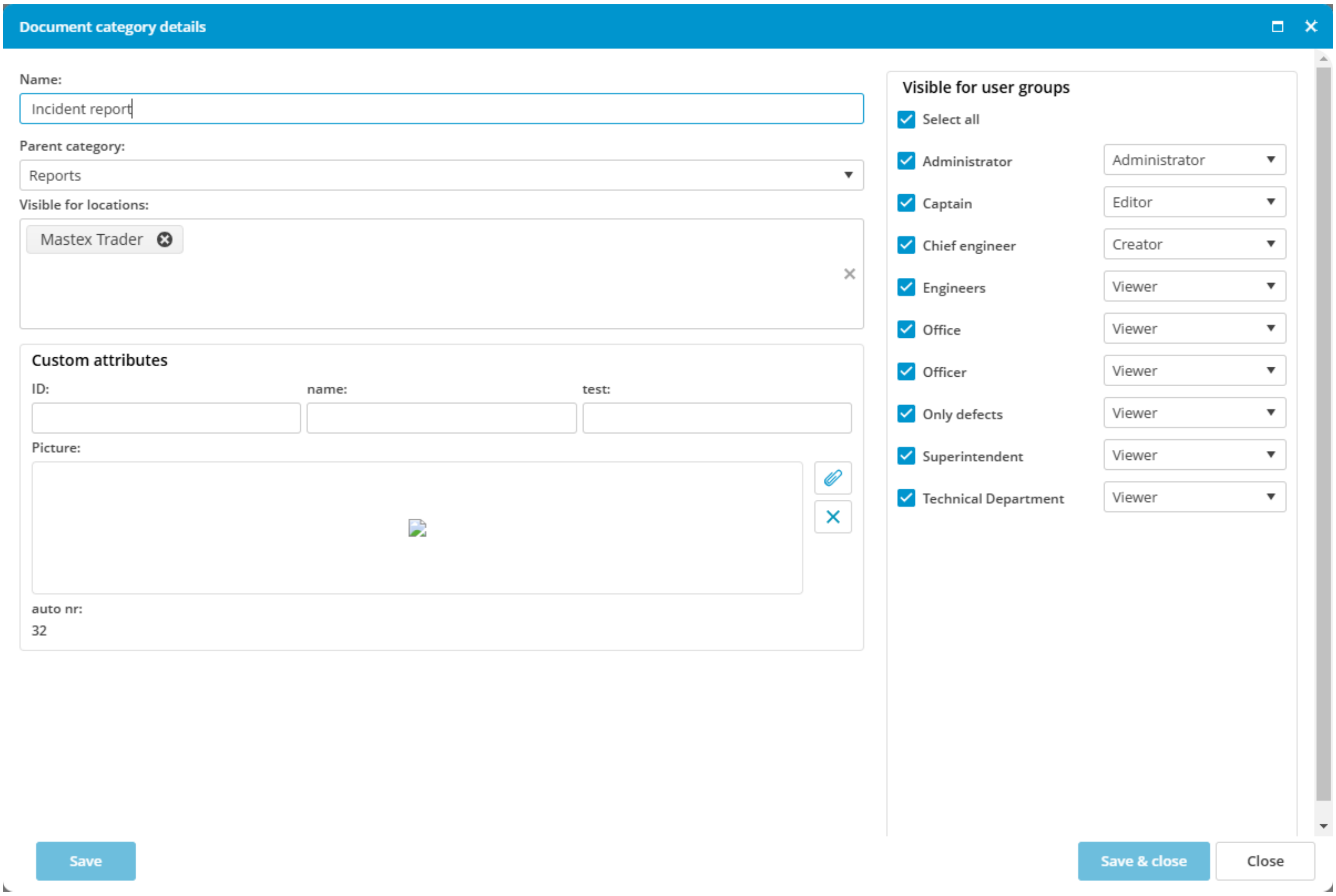
How do I copy a category?

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.



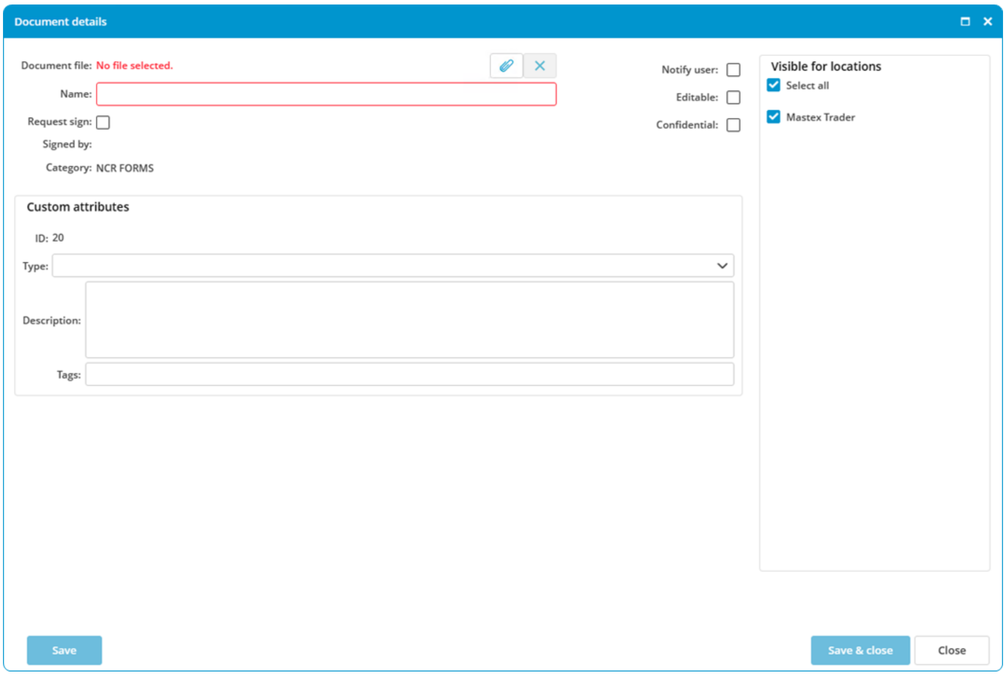
How do I assign roles to categories?

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.



How do I create a new document?

1. Click on **New document.**

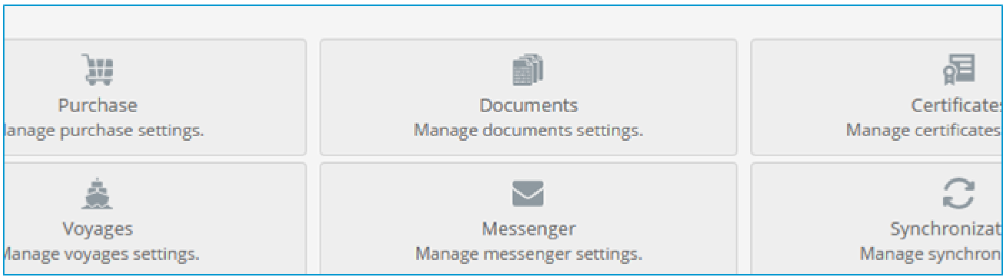


2. Click on  to select the **document.**
3. Enter or edit the **Name**. The name of the document will be automatically generated based on the chosen document.
4. In the right column, select the **locations** for which the document should be visible.
5. Complete all required fields.
6. Click on **Save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

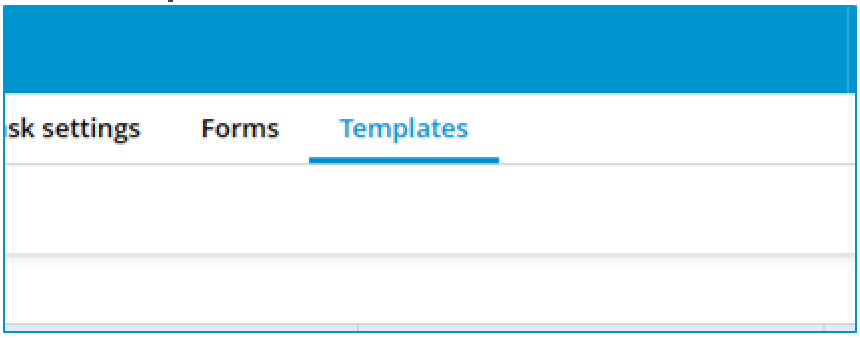
- **Description**: Enter a description of the document.
- **Tags**: To be able to search for certain words using the search function.
- **Confidential**: Indicate whether this is a confidential document. Only authorised users will have access to this document. This document will not appear in the list 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?

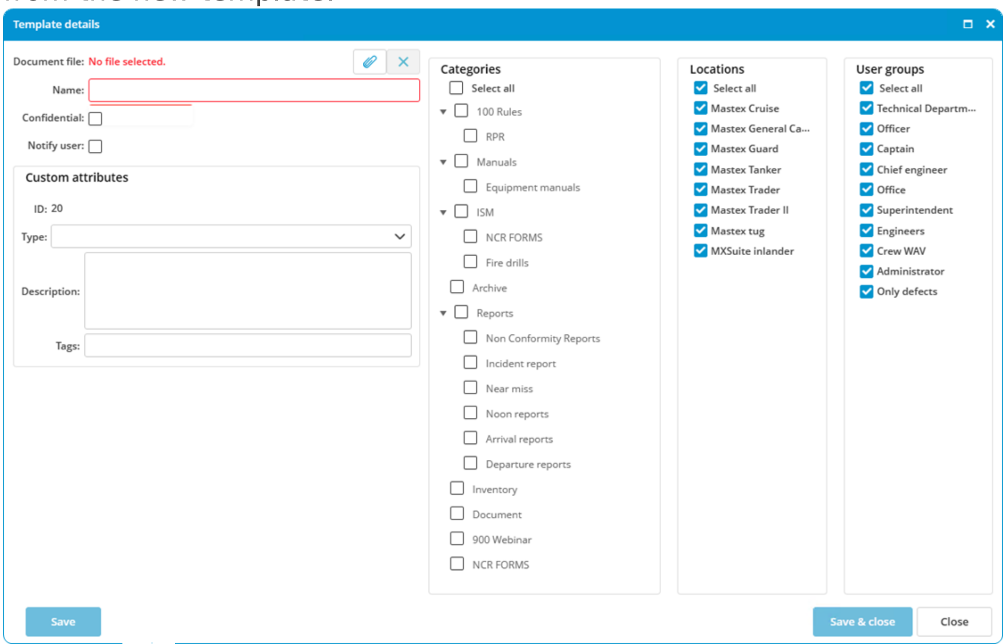
1. Click on **Administration** in the sidebar.
2. Select **Documents.**



3. Select **Templates.**



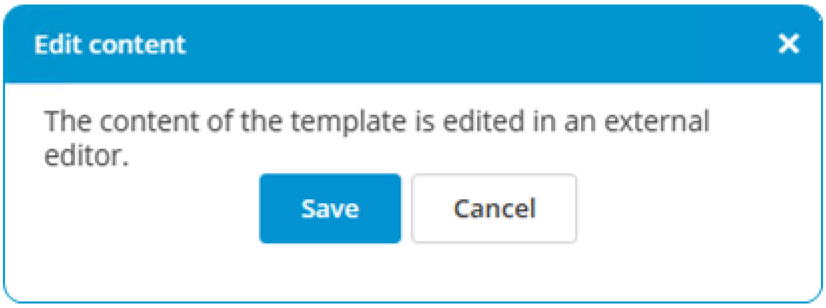
4. In the screen Manage templates, click on **New...** You can now enter the basic information from the new template.



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’?

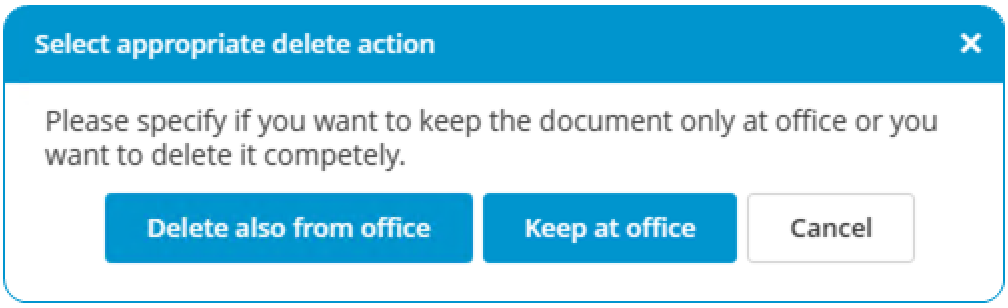
1. Right-click on the form.
2. Select **Edit properties**...
3. Select the option **Is closed.**

> 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.



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.

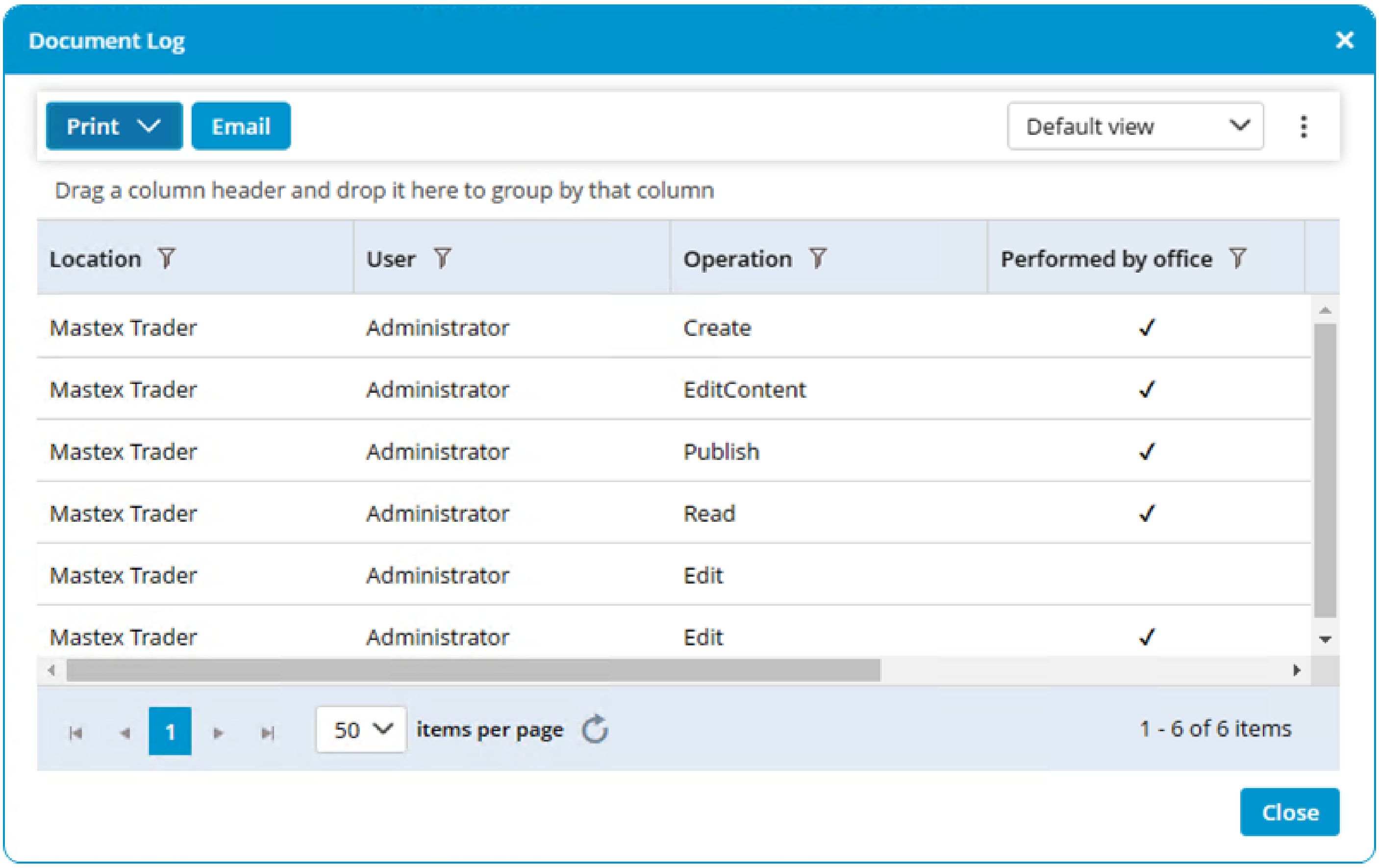
1. Right-click on the document.
2. Select the option **Request edit.**

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.

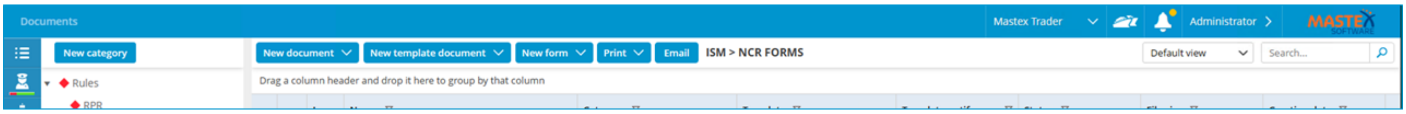
How do I see what happened to a document?

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



How do I search for a document?

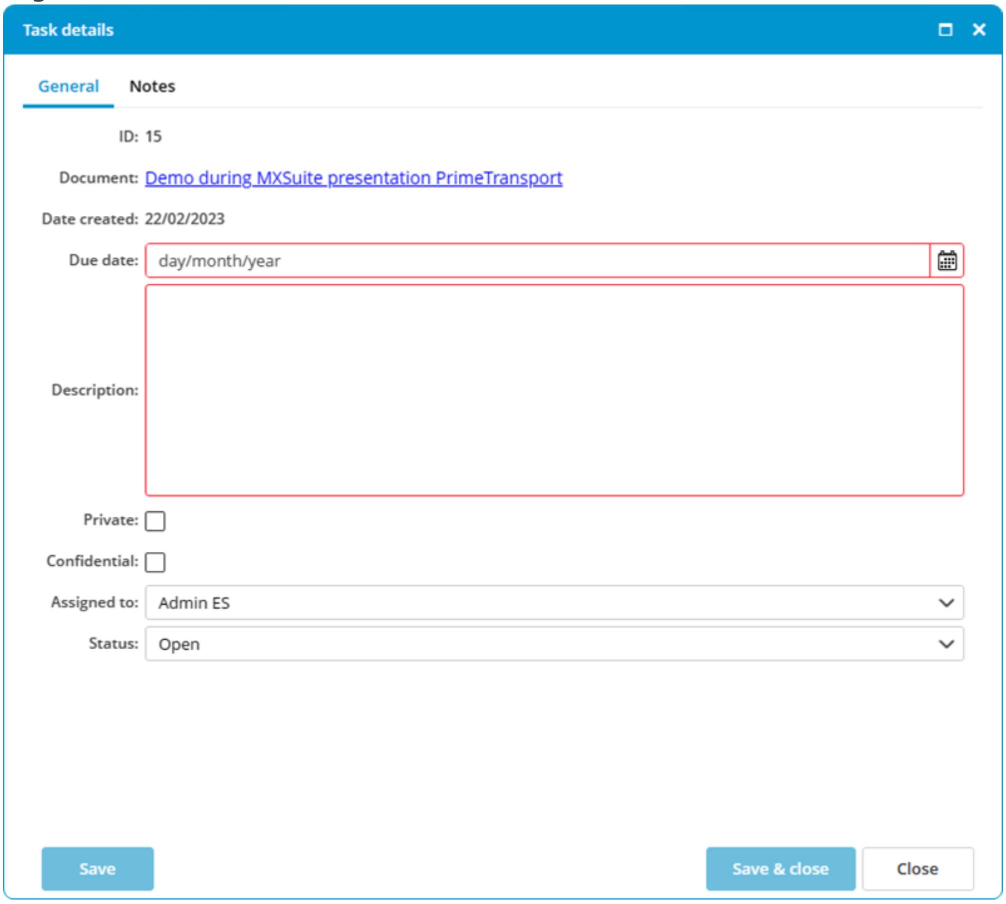
1. Enter a search term into **Search...**
2. All documents that contain the search term will be displayed.



> 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**.



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.