

Projects

The MXSuite Projects module helps you to get a grip on your projects like dry dockings and refits.

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Projects Basic vs Standard

There are two versions of the Projects module: Basic and Standard.

The Basic version is part of the Assets Tasks. The Standard version has more extensive functionality.

	Projects Basic	Projects Standard
Name the projects	✓	✓
Project start date and end date	✓	✓
Project type	✓	✓
Project manager	✗	✓
Project status and percentage completed	✗	✓
Link Assets Tasks to Projects	✓	✓
Financial project overview	✗	✓
Link product orders to Projects	✗	✓
Link service orders to Projects	✗	✓
Create project reports	✗	✓
Assign yard services with pricing	✗	✓
Save project documents	✗	✓
Save project photo's	✗	✓

How do I create a new project?

1. Open the **Projects module** in the left module bar
2. Click on **New...**
3. Fill in all details for the new project

Project details

General Financial Tasks Reports Purchase Services Documents Photos

Name:	Engine overhaul	Project manager:	Heinecke, Klaus
Ship:	Mastex Trader	Project status:	Execution
Start date:	01/12/2024	% completed:	
End date:	15/12/2024	Main contractor:	Pon Power
Type:	Standard	Overall budget:	500.000,00 EURO

Save Save & close

4. Click on **Save & close**

How do I create a new project task?

1. Open the module **Assets Tasks**
2. 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:

Project types
Each Project

Ranks

Other
Time needed: hours
Priority:

Remark is mandatory
 Attachment is mandatory

3. Describe the task in the **Task name** and in the tab **Task description**
4. Eventually, link the task to a project type
5. Click on **Save & close**

A task can be linked to a project type. When a project is created with that type, all tasks linked to that type will be linked to the newly created project.

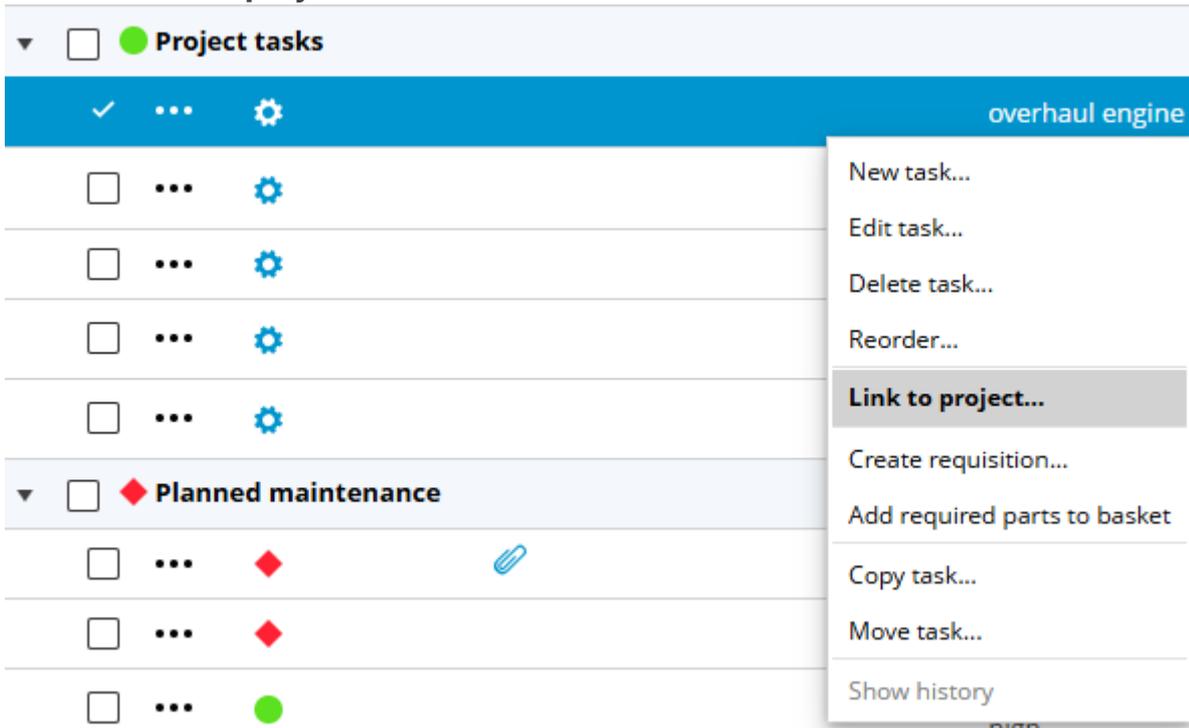
Project types can be created and modified in Administration > Projects. The default project types are *Standard*, *Intermediate* and *Special*.

How do I assign a task to a project?

There are 2 options to link a task to a project. Assume that the task and the project have already been created.

Option 1

1. Open the module **Assets Tasks**
2. Right click at a project task
3. Click on **Link to project...**



4. Select the project to which the task should be linked.

Link task to project □ ×

Active projects ▼ Search... 🔍

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

Name ▼	Is linked to task
Project - 01.07.2020 - 16.07.2020	
Project - 01.08.2020 - 08.08.2020	
Project - 01.07.2022 - 08.07.2022	
Cape Town Docking	
Engine overhaul	✓
Winter repair period 2025	✓

◀ 1 ▶ 50 items per page ↻ 1 - 6 of 6 items

Save & close Close

5. Click on **Save & close**

Option 2

1. Open the project to which the task should be linked.

- Open tab **Tasks**
- Click on **New...**
- All available project tasks are shown now

Project tasks available to link □

Default view ▾ Search... 🔍

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

<input type="checkbox"/>	Category path ▾ ↑	Task id ▾	Task name ▾	Is linked to project ▾
<input type="checkbox"/>	100 Superstructure > 110 Hull		repaint hull	
<input type="checkbox"/>	200 Engines & propulsion > 210 Main engines > 210.1 Main Engine PS		Overhaul engine	✓
<input type="checkbox"/>	200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB		Overhaul TC2	✓
<input type="checkbox"/>	200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB		test	✓
<input type="checkbox"/>	200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB		replace engine	
<input checked="" type="checkbox"/>	200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB		docking task	✓
<input checked="" type="checkbox"/>	200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB		overhaul engine	✓

⏪ ◀ 1 ▶ ⏩ 50 items per page ↻
1 - 7 of 7 items

Save & close
Close

- Select the task(s) and click **Save & close**

How to register the progress of a project task?

1. Open the tab **Tasks** in the project
2. Open the task
3. In the tab **General**, the estimated cost, contractor, and percentage (%) completed can be edited

Task completed

200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB > Project tasks Print work order

change TC

General Remarks Documents Photos Parts Purchase

Date: 12/09/2024

Week: 37
Project: Engine overhaul

Planned date: 05/12/2024

Real cost: 115.000,00 EURO

Estimated cost: 125.000,00 EURO

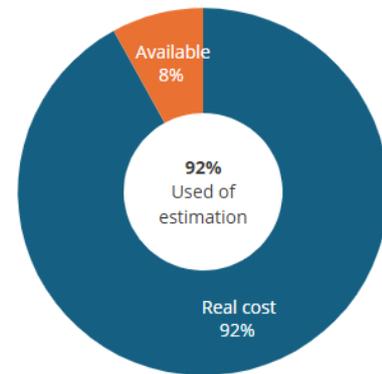
Contractor: Pon Power

% completed: 20

0 50 100

Description
ffgkhlkj

Save & close Close



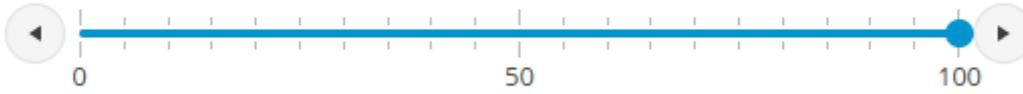
4. Extra remarks, documents, and photos about the progress can be added in the related tabs.

If the task is completed, move the slider in the tab General to 100%.

How do I complete a project task?

1. Open the task
2. Move the slider to 100%

% completed: 100



3. Click on **Save & close**