

Projects

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

- [Projects Basic vs Standard](#)
- [How do I create a new project?](#)
- [How do I create a new project task?](#)
- [How do I assign a task to a project?](#)
- [How to register the progress of a project task?](#)
- [How do I complete a project task?](#)

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

Project tasks

Budget code:

Project types

Each Project

Ranks

Other

Time needed:

hours

Priority:

☐ Remark is mandatory

☐ Attachment is mandatory

Save

Save & close

Close

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.

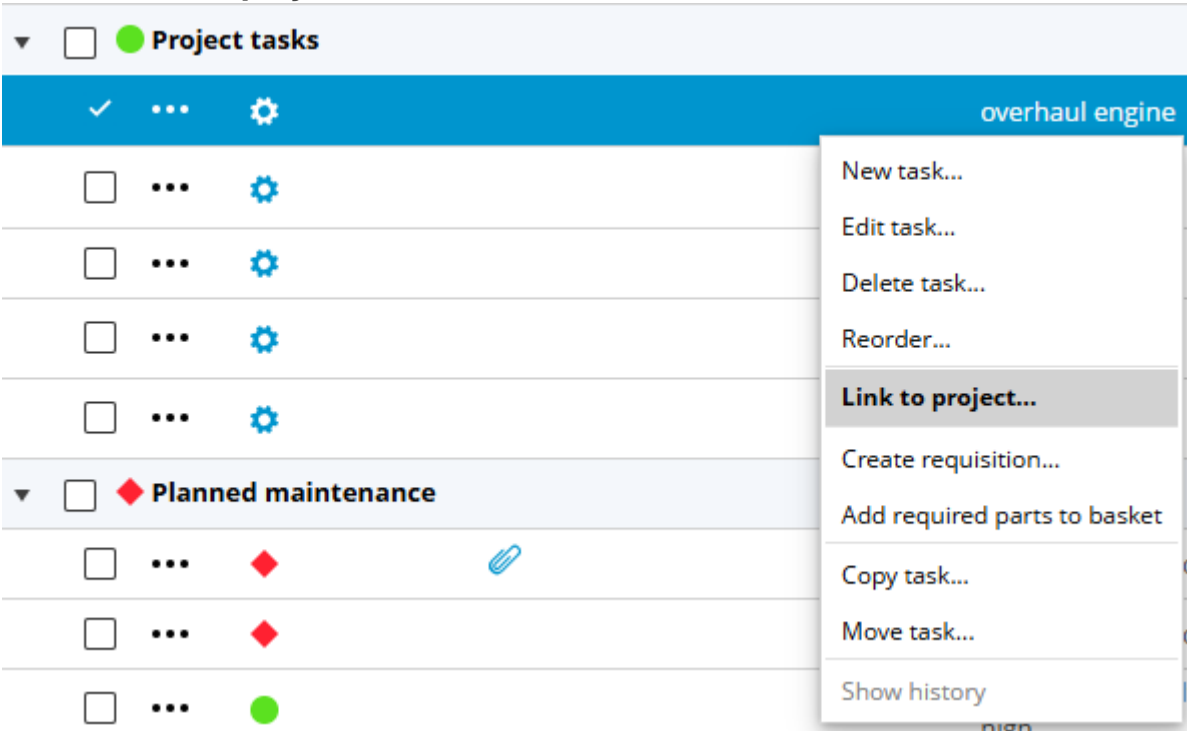
Project types can be created and modified in Administration > Projects. The default project types are *Standard*, *Intermediate* and *Special*.

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.

- 2. Open tab **Tasks**
- 3. Click on **New...**
- 4. 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	
✓	200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB		docking task	✓
✓	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

- 5. 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

GeneralRemarksDocumentsPhotosPartsPurchase

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

Available 8%

92% Used of estimation

Real cost 92%

Save & close

Close

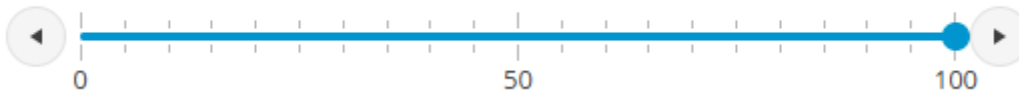
4. Extra remarks, documents, and photos about the progress can be added in the related tabs.

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**