

MXSuite Excel Import - Export

In this chapter you can find technical details on preparing an import per module.

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General info

Import field relations with general data

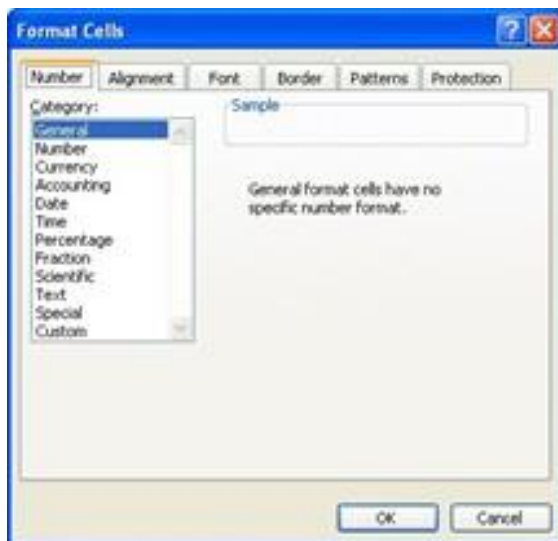
If you filled in the following columns in the Excel file:

- Budgetcodes
- Currencies
- Product categories
- Units
- Ranks

Then this data must exist in the Administration module

All fields in the Excel file must be in text format.

For example, if there is a problem after importing inventory with the PartNumber (column C) change the format of this column (Right mouse click on this column, select Format Cells) to category General



Do not change the top row of the Excel file! If this is changed, the import will fail

AssetsCategories

General

The categories will be used to link all maintenance tasks and spare parts to a category. The sheet in the Excel file is called "AssetsCategories"

Details fields

To fill the Excel file correctly, make sure that all fields are filled correctly. Below are the fields listed.

Field	MAX Characters	Required	Comment
ID	128		Id number of the category
ParentCategories			If this category is a child of another category, enter the ID number of the parent category, followed by a space, followed by the name of the parent category
Name	128	X	Name of the category
IsCritical	5		True or False
IsOperationalCritical	5		True or False
Priority	18.2		Number with 2 decimals, separated by a comma
Comments	1024		Comment for the category
Defaultcounter	128		Preferred counter for counter-based maintenance tasks. The name of the counter should be mentioned

Example

1	ID	ParentCategories	Name	IsCritical	IsOperationalCritical	Priority	Comments	DefaultCounter
40	200		MAIN MACHINERY	FALSE				
41	210	200 MAIN MACHINERY	PROPULSION SYSTEM	FALSE				
42	211	200 MAIN MACHINERY	PROPULSION ENGINE SYSTEM	FALSE		90,00		Main engine
43	212	200 MAIN MACHINERY	REDUCTION GEAR SYSTEM	FALSE				
44	213	200 MAIN MACHINERY	THRUST SYSTEM / SHAFTS	FALSE				
45	214	200 MAIN MACHINERY	CONTROL SYSTEM PROPULSION	FALSE				
46	220	200 MAIN MACHINERY	STEERING SYSTEM	FALSE				
47	221	200 MAIN MACHINERY	RUDDER INSTALLATION	FALSE				
48	222	200 MAIN MACHINERY	STEERING GEAR SYSTEM	FALSE				

AssetsCategoriesProperties

This part is used to load all Category Attributes in MXSuite. The sheet in the Excel file is called "AssetsCategoriesProperties".

Details fields

To fill the Excel file correctly, make sure that all fields are filled correctly. Below are the fields listed.

Field	MAX Characters	Required	Comment
ParentCategories		X	Show the category path of the category that this entity needs to be connected to. If this is linked to a subcategory, enter the ID + name of the main category, followed by a space, > , and a space, followed by the ID + name of the subcategory
Name		X	The Name of the attribute
Value			The Value of the attribute
Type		X	The Type of the attribute, the default value is None
ShowOnServiceOrders			If this information must be printed on the Service order, set the value to True; otherwise, set it to False
ShowOnProductOrders			If this information must be printed on the Product order, set the value to True; otherwise, set it to False

Example

	ParentCategories	Name	Value	Type	ShowOnServiceOrders	ShowOnProductOrders
1	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES > 601 DIESEL ENGINE No01 > 601000001 Main Engine No01	Manufacturer	Caterpillar	None	True	True
3	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES > 601 DIESEL ENGINE No01 > 601000001 Main Engine No01	Type	3516C	None	True	True
4	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES > 601 DIESEL ENGINE No01 > 601000001 Main Engine No01	Serial number	PXH00231	None	True	True
5	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES > 601 DIESEL ENGINE No01 > 601000001 Main Engine No01					

Counters

General

This part is used to load all counters in MXSuite. The sheet in the Excel file is called "Counters".

Details fields

To fill the Excel file correctly, make sure that all fields are filled correctly. Below are the fields listed.

Field	MAX Characters	Required	Comment
Name	128	X	Name of the Counter
Unit	128	X	The unit name should <u>exactly match the name</u> of the Unit as known in Administration -> Units
AveragePerWeek		X	The maximum average per week for the selected unit. For unit Running hours, the average must be set to 168
ActualCounterValue		X	The actual counter value for the imported counter machine
ParentCounter			If the counter will use the input from another counter, specify here the countername

Example

	A	B	C	D	E
1	Name	Unit	AveragePerWeek	ActualCounterValue	ParentCounter
3	Main Engine SB	Runninghours	168	3000	
4	Gearbox SB	Runninghours	168	2500	Main Engine SB

AssetsTasksGroups

General

All maintenance tasks are linked to a maintenance job plan. The job plan is linked to a category. So the maintenance job plans are between the categories and maintenance tasks.

The sheet in the Excel file is called "AssetsTasksGroups".

Details fields

To fill the Excel file correctly, make sure that all fields are filled correctly. Below are the fields listed.

Field	MAX Characters	Required	Comment
ParentCategories		X	Show the category path of the category that this entity needs to be connected to. If this is linked to a subcategory, enter the ID + name of the main category, followed by a space, > , and a space, followed by the ID + name of the subcategory
Name	128	X	Name of the group
ID	128		ID number of the group
CostCode			The Costcode name should exactly match the <u>name</u> of the Budgetcode as known in Administration -> Budgetcodes

Example

	A	B	C	D
1	ParentCategories	Name	ID	CostCode
3	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES	Corrective maintenance		
4	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES	Project		
5	6 MACHINERY MAIN COMPONENTS > 60 PROPULSION DIESEL ENGINES	Planned maintenance		

AssetsTasks

General

This part is used to load all tasks in MXSuite. The sheet in the Excel file is called "AssetsTasks".

Details fields

To fill the Excel file correctly, make sure that all fields are filled correctly. Below are the fields listed.

Field	MAX Characters	Required	Comment
ParentCategories		X	Show the category path of the category that this entity needs to be connected to. If this is linked to a subcategory, enter the ID + name of the main category, followed by a space, > , and a space, followed by the ID + name of the subcategory
AssetsTasksGroupName	128	X	Name of the group which the maintenance task is connected.
TaskType	9	X	Type of the interval of the maintenance task. 2 options are possible: - Recurring: This is used if the task needs to be done according to a given interval - OneTime: This is used if the task needs to be done one time. There is no interval connected
ID	128		ID number of the maintenance task
TaskName	128	X	The name of the maintenance task
UseTaskOnce	5		If the TaskType is set to Onetime, this setting must be set to True Otherwise, this setting must be set to False

Field	MAX Characters	Required	Comment
IsDefect	5		Only if the Tasktype is set to Onetime, and the UseTaskOnce is set to True, can this setting be set to True if the task is a defect. Usually, this setting is False.
IsCounterBased	5		If the maintenance task is based on running hours, this must be set to True; otherwise, fill in the option False. If the maintenance task is both based on running hours and time-based, set this to True. In column Duedate, fill in the proper date, and fill in column DueRunningHours, the due running hours value
IsRemarkMandatory			If a remark is mandatory during marking a maintenance task as done, set this to True If no remark is needed during marking a maintenance task as done, set this to False
CostCode	50		The Costcode name should exactly match the name of the Budgetcode as known in Administration -> Budgetcodes
IsFixedInterval	5		If the maintenance task has a fixed interval, set this option to True. Otherwise, fill in option False
IntervalValue			If the task has a time interval, fill in here the value of days/weeks/months If the task has a counter interval, fill in the value of the counters If the task is a one-time task, leave this field empty If the task is a docking task, leave this field empty

Field	MAX Characters	Required	Comment
IntervalType	6	X*	* In case that the task is not a counter-based task or the field IsDocking = false, this field is mandatory Fill in here the type of interval. Possible values are: <ul style="list-style-type: none"> - Days - Weeks - Months
DueDate	19	X*	* In case that the task is not a counter-based task or the field IsDocking = false, this field is mandatory. The due date of the task. Written in the date-time format of the PC that imports the file. The default Dutch format is D-M-YYYY HH:MM:ss
MaximumIntervalValue			If the task is based on counters and time-based, fill here the number of days/weeks/months
MaximumIntervalType	6	X*	* In case a value is entered in MaximumIntervalValue, this field is mandatory. Fill in here the type of interval. Possible values are: <ul style="list-style-type: none"> - Days - Weeks - Months
RunningHoursMachine		X*	*In case the task is counter-based, this field is mandatory. Fill in the name of the related counter machine here.
DueRunningHours		X*	*In case the task is counter-based, this field is mandatory. Fill in here the value of the counter when the task becomes due. A numeric value is accepted without decimals.

Field	MAX Characters	Required	Comment
IsProject	5		Is the task is related to a project, set the value to True, otherwise set to False
DownTime			The time needed to finish the task in hours. Only a numeric value without decimals is accepted.
WarningPeriod			Here, the warning period as a numeric field in combination with the field WarningType. For example, WarningPeriod 7 and WarningType 1 mean that the task becomes due 7 days before the due date; in this case, fill in number 7.
WarningType	1		Fill in here the type of interval. Possible values are: Value 1 for the interval in days Value 2 for the interval in weeks Value 3 for the interval in months
LongDescription			The long task description where the procedures can be described how to perform the task. With Alt-Enter in the Excel sheet, the text starts on a new line. Note: layout formatting is not possible via the import from Excel.
TaskCompletionNeedsApproval	5		If the task needs to be approved by another rank, set the value to True. If the task does not need to be approved by another rank, set the value to False. Note: The approver rank can be entered in Sheet: AssetsTasksApproversRanks

Field	MAX Characters	Required	Comment
IsAttachmentMandatory	5		<p>If an attachment is required when completing the task, set this value to True</p> <p>If an attachment is not required when completing the task, set this value to False</p>
Priority			<p>The possible priorities are:</p> <ul style="list-style-type: none"> - Top priority - Urgent - High - Normal - Low - Not prioritized <p>The priorities can be managed in Administration -> Lookups -> Task priority</p>

AssetsTasksRanks

General

This part is used to link ranks to a task. The sheet in the Excel file is called “AssetsTasksRanks”.

Details fields

To fill the Excel file correctly, ensure that all fields are completed accurately. Below are the fields listed.

Field	MAX Characters	Required	Comment
ParentCategories		X	Show the category path of the category that this entity needs to be connected to. If this is linked to a subcategory, enter the ID + name of the main category, followed by a space, > , and a space, followed by the ID + name of the subcategory
AssetsTasksGroupName	128	X	Name of the group to which the maintenance task is connected.
TaskName	128	X	The name of the maintenance task
RankName		X	The name of the rank that must be linked to the task

If more ranks must be linked to one task, add per rank a new line to be linked to the task.

AssetsTasksApproversRanks

General

This part is used to link the ranks that must approve the task signoff. The sheet in the Excel file is called "AssetsTasksApproversRanks".

Details fields

To fill the Excel file correctly, ensure that all fields are completed accurately. Below are the fields listed.

Field	MAX Characters	Required	Comment
ParentCategories		X	Show the category path of the category that this entity needs to be connected to. If this is linked to a subcategory, enter the ID + name of the main category, followed by a space, >, and a space, followed by the ID + name of the subcategory
AssetsTasksGroupName	128	X	Name of the group to which the maintenance task is connected.
TaskName	128	X	The name of the maintenance task
RankName		X	The name of the rank that must approve the task signoff

If more ranks can approve the task signoff, add a new line per rank to be linked to the task.

AssetsTasksParts

General

This part is used to link the parts that are used during the task sign-off. The sheet in the Excel file is called "AssetsTasksParts".

Details fields

To fill the Excel file correctly, ensure that all fields are completed accurately. Below are the fields listed.

Field	MAX Characters	Required	Comment
ParentCategories		X	Show the category path of the category that this entity needs to be connected to. If this is linked to a subcategory, enter the ID + name of the main category, followed by a space, >, and a space, followed by the ID + name of the subcategory
AssetsTasksGroupName	128	X	Name of the group to which the maintenance task is connected.
TaskName	128	X	The name of the maintenance task
Owncode	50	X	The unique number of the part that will be linked to the task
Quantity		X	The quantity of the part that will be used during the task sign-off
CostCode	50		Lookup to the Cost Codes as defined in the tab Administration. This should exactly match the <u>name</u> of the cost code.