202401

MASTEX SOFTWARE

user manual

1 Getting started with MXSuite

1.1 Mastex Software BV

MXSuite is developed by Mastex Software BV. New features are added daily to MXSuite and we are working on continuous improvement. Despite the fact that MXSuite is easy to use, we created this user manual to make the use of MXSuite even easier.

If your question is not answered in the user manual, first contact your MXSuite supplier. If you purchased MXSuite directly via Mastex Software BV, you can contact our help-desk instead. The telephone help-desk is available on weekdays from 8:30 AM to 5:00 PM (CET). You can also contact us by email.
To make optimal use of MXSuite and to get the most out of your organisation, Mastex Software BV offers training programmes on location and at our own training facilities. In consultation with you, we can create a basic training programme or course that is tailored to your specific needs. Feel free to contact us to discuss the available options.

Contact information:	
Telephone	+31 78 202 02 02
Support email	success@mastexsoftware.com
Sales email	hello@mastexsoftware.com
Website	www.mastexsoftware.com

1.2 MXSuite fleet management software

Tools are needed in order to manage your fleet properly. With a range of modules, MXSuite gives you the chance to optimise fleet management, from maintenance to certificates and from purchasing to crewing. Data is available at the click of the mouse and can be automatically exchanged between ship and office.
MXSuite was developed using the latest technological advancements, but is easy and effective thanks to its simple user interface. This means users with minimal knowledge of computer systems can also use the software.

We wish you the best of luck with MXSuite!

1.3 System requirements

To be able to use MXSuite, your system must meet the following requirements.

Component	Minimal requirements
Processor	x64 Processor 1.4GHz. AMD Opteron, AMD Athlon 64, Intel Xeon with Intel EM64T support, Intel Pentium IV with EM64T support
Memory	4 GB RAM
Operating system	Windows 10 TH1 1507 or greater Windows Server 2016 or greater
Hard drive	128 GB
Graphics	Super-VGA resolution 1024x768
Database	Microsoft SQL Server 2012 Express

To make optimal use of MXSuite the following is recommended:

Component	Recommended
Processor	x64 Processor 2.0 GHz. Intel i5 / i7 processor
Memory	8 GB RAM
Operating system	Windows 10 TH1 1507 or greater Windows Server 2016 or greater
Hard drive	1024 GB; SSD
Graphics	Full HD, resolution 1920x1080
Database	At office: Microsoft SQL Server 2022 Standard On board: Microsoft SQL Server 2022 Express

Note:

The delivery of MXSuite includes the database program Microsoft SQL Server Express by default. While this version is offered for free by Microsoft, please bear the following limits in mind:

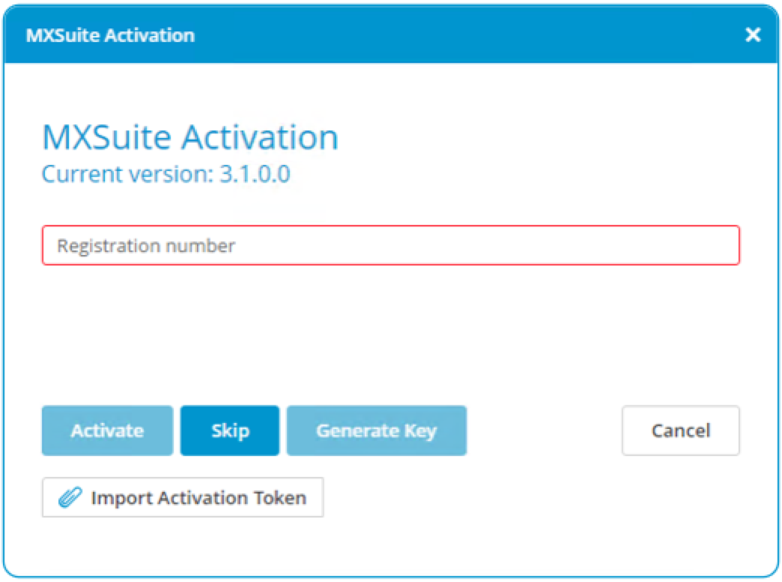
- Maximum 1 GB memory usage
- A maximum of 10 GB of data storage (attachments in MXSuite are not included)

When you start reaching these limits, we recommend switching to the Standard edition of SQL Server. In practice, the office version will likely need to be switched to the Standard version in due time.

1.4 Registration number MXSuite

After MXSuite is installed, you will be prompted to enter a registration number during the initial set-up.

Enter the **registration number** and click on **Activate** to activate the license. License data will be collected online from the MXSuite license server, after which MXSuite will be ready for use.



1.5 Starting MXSuite

MXSuite opens with a login window:

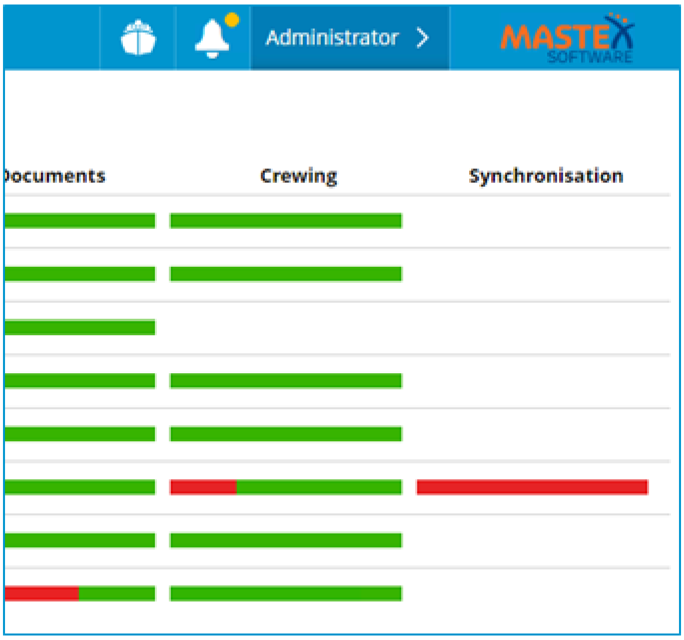
Select or type your user name and enter your password.

The standard password for the **Administrator** is **admin.**

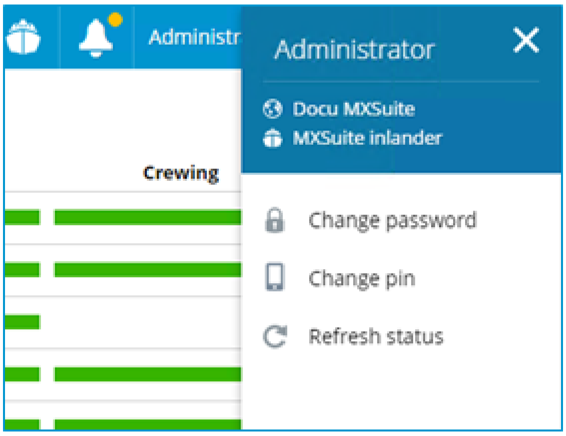
Important:
Immediately change the administrator's default password to prevent misuse.

1.6 How do I change my MXSuite password?

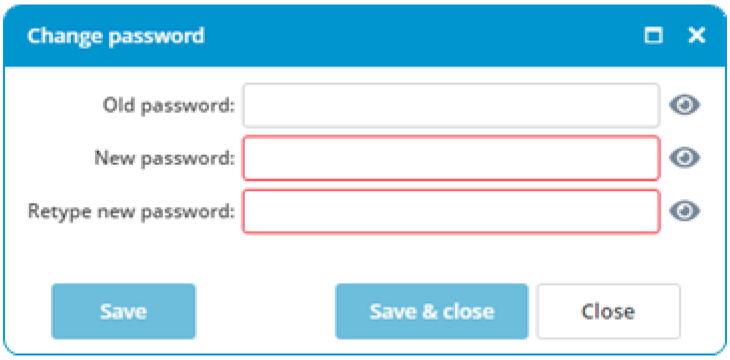
1. Click on your user name.



2. Click on **Change password**.



3. Enter your current (old) password and then enter your new password twice.



4. Click on **Save & close**.

1.7 What do the colours mean?

In MXSuite three main colours are used. These colours are often used in symbols or on part of the status bar. The colours indicate the status of the relevant item.
A status bar indicates which percentage of items are red, orange or green.

The table below explains the meaning of each colour per module.

Module	Meaning
Assets Tasks	task is in good order the task expires this week this task should have been completed
Assets Parts	this part is well-stocked there is not enough stock to perform the upcoming maintenance activities the actual stock of this part is less than the required minimum stock level
Counters	the counter values were recently updated the counter values hours have to be entered the actual counter values have not been entered for more than seven days
Certificates	the certificate is in good order a survey must be conducted the certificate has expired or a survey should have been conducted
Safety	the drill does not need to be performed yet the drill has to be performed during this period this drill should have been performed
Purchase	the order is being processed and the delivery date has not yet expired the order is marked as unread the delivery date has expired and the order has not been delivered
Documents	the document task is in order the document task is about to expire the expiry date of the document task has been exceeded

Module	Meaning
Crewing	there are no expired documents for the crew member the crew member has documents that are about to expire the crew member has expired documents
Synchronisation	the synchronisation for both data and documents was recently performed the data and/or document synchronisation has not been performed for 8-14 days the data and/or document synchronisation has not been performed for more than 14 days

2 Views

In MXSuite, results are displayed in different ways. These are known as **views**.

A view determines which data is displayed on the screen. It also determines the order, the columns and the way the data is ordered. Per user the most recent used view is saved and displayed next time by default.

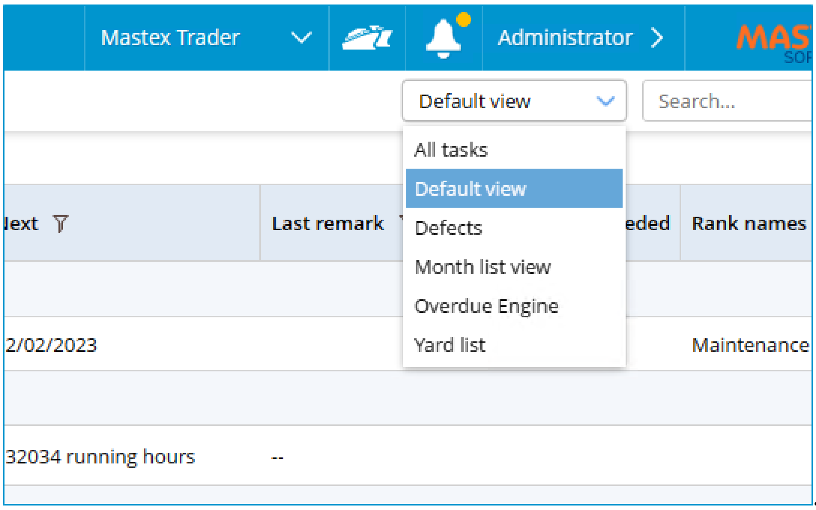
The following view operations are possible:

- Select different views
- Filter data
- Order by columns
- Search for specific words within the selected view
- Print the data in the selected view
- Change the ordering in a view

Note:
The views can be configured to the user's needs. This chapter uses the default settings. Texts or images may therefore differ from your situation.

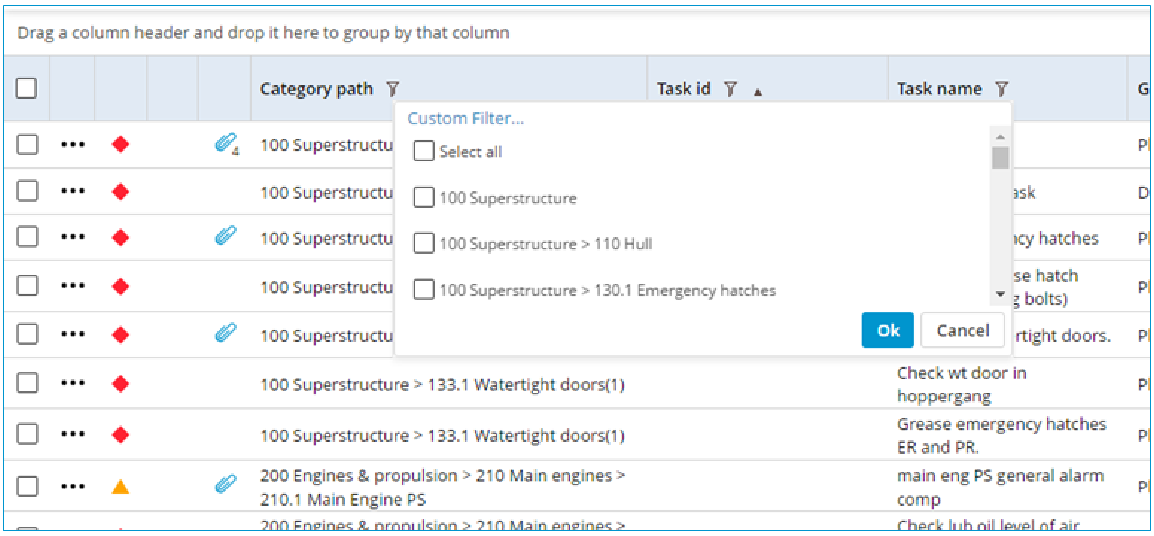
2.1 How do I select a different view?

Click on the view drop-down in the top-right corner of the screen, and select a view.



2.2 How do I filter in a view?

1. Click on  in the column header
2. Select the desired filter



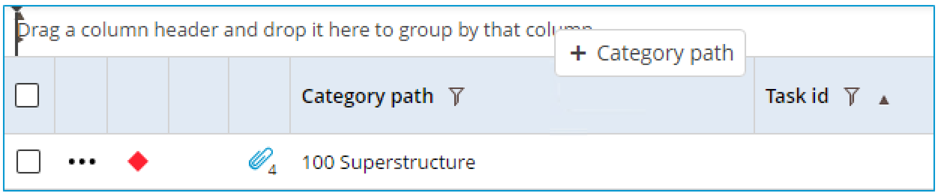
3. Click on **Ok**

Note:

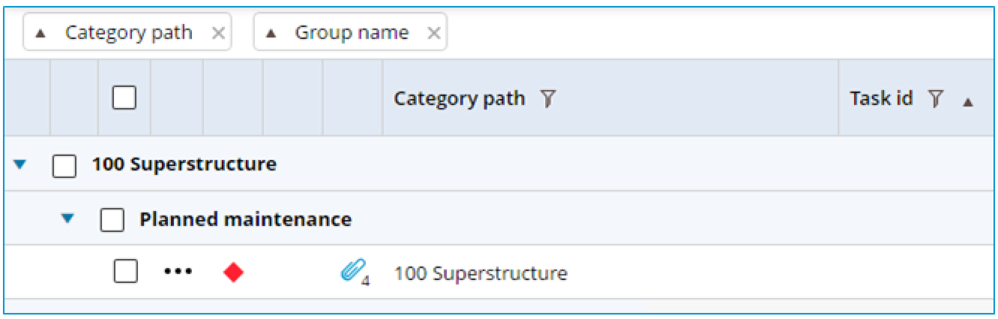
Active filters can be identified by the filter symbol  above the relevant column.

2.3 How do I group columns?

Drag a column to the group bar.



This view has the option of grouping multiple columns. You can also change the order of the grouped columns, by dragging them to the front or back.



2.4 How do I search in a view?

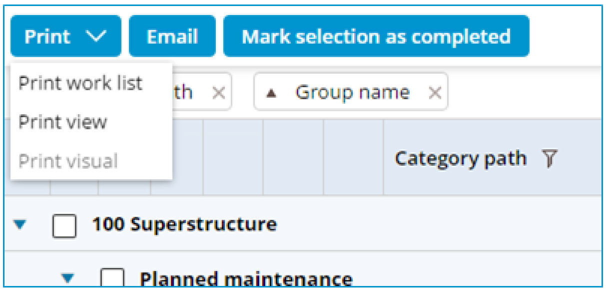
Enter the search term in the search bar and hit enter, or click the search button.

Note:
In the view definition (to be created by an MXSuite administrator), determine the columns to include in or exclude from your search.

2.5 How do I print a view?

Each view can be printed. It is possible to print specific information as a report.

1. Click on **Print > Print view.**



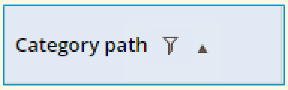
2. The view will be printed as seen on the screen.

2.6 How can I change the ordering in a view?

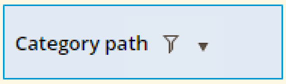
1. Go to the column name in question
2. Click on the column name to change the ordering

Tip:

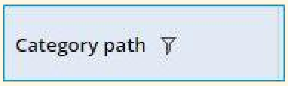
Look next to the column name to see how the column is sorted. There are 3 options:



Ascending order.



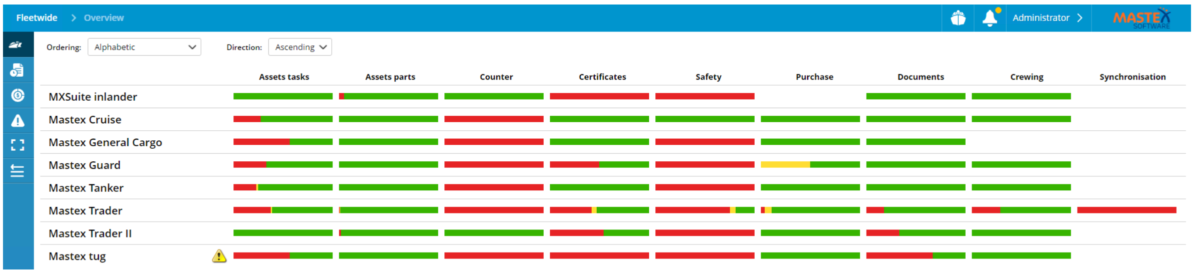
Descending order.



Ordered according to the display settings.

The numbers next to the arrows indicate the order priority. MXSuite will first sort the view on the column with number 1, then number 2 and so on...

3 Fleetwide overview

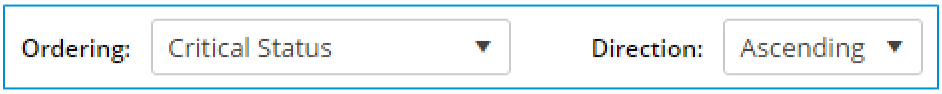


The fleetwide overview gives you information about the status of the various MXSuite modules for the entire fleet. The status of the different modules can be seen per ship in the status bar. Click on a bar to open the relevant module for the selected ship.

Note:
The fleetwide overview is only available in the office version of MXSuite. The accuracy of the data depends on the synchronisation settings between the office and the ships.

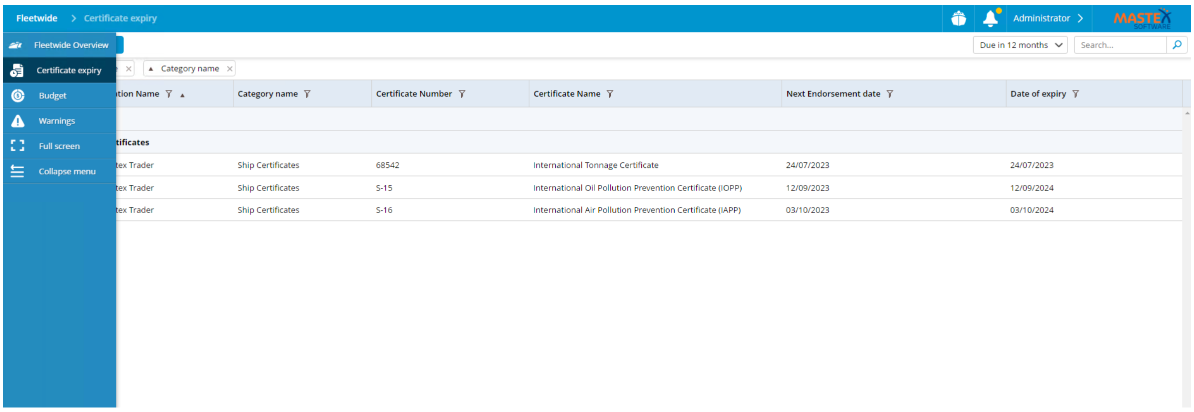
3.1 How do I change the order of my ships?

1. Click on **Ordering** at the top right and select one of the ordering options
2. Click on **Direction** at the top right and select **Ascending** or **Descending**



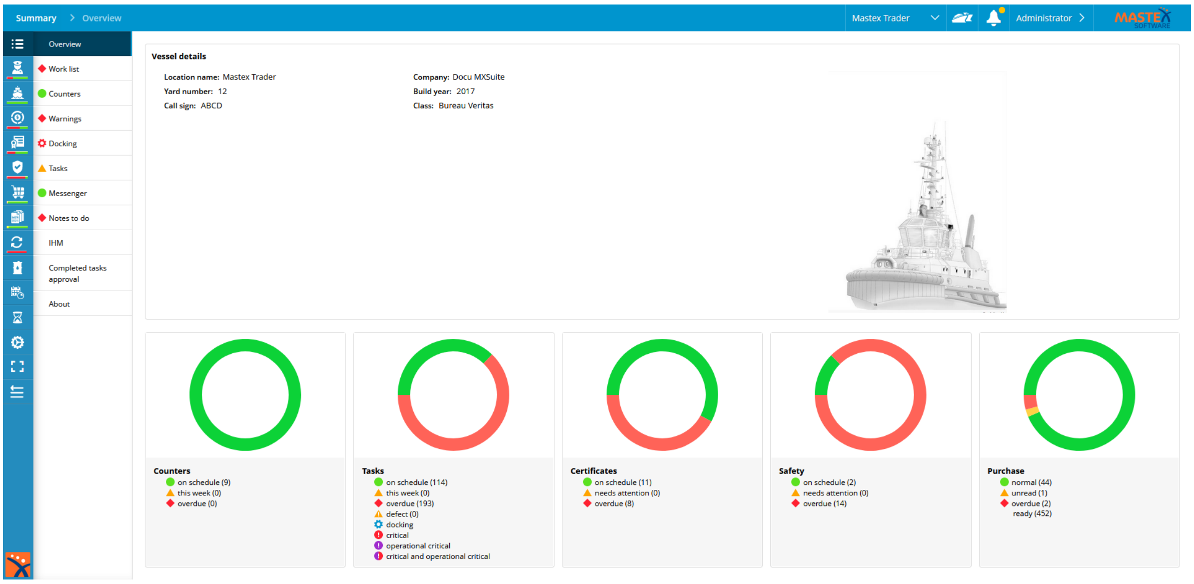
3.2 How do I get an overview of the expired certificates for the entire fleet?

In the fleetwide overview, click on **Certificate expiry**.



This generates an overview of the certificates as defined in the selected view. If multiple views have been configured, these can be selected using the view selector at the top right of the screen.

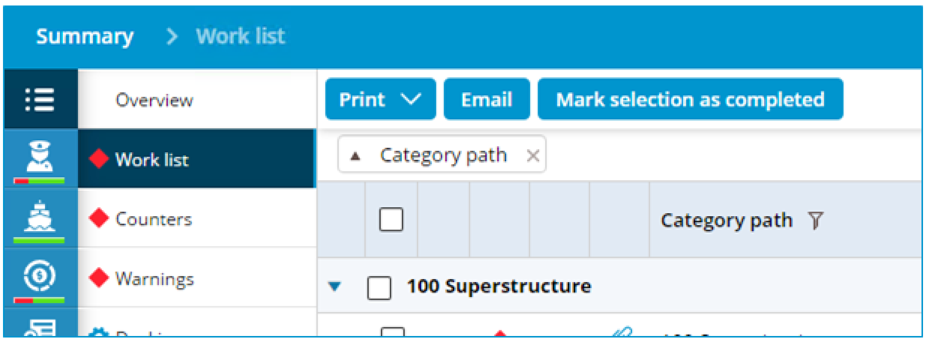
4 Summary



This is the home screen that will appear when MXSuite is opened on the vessel.
The module bar can be found to the left. The menu features are described in the next paragraphs.
All modules can be opened from the side navigation.

4.1 How do I know which maintenance activities to perform?

Click on **Work list**.

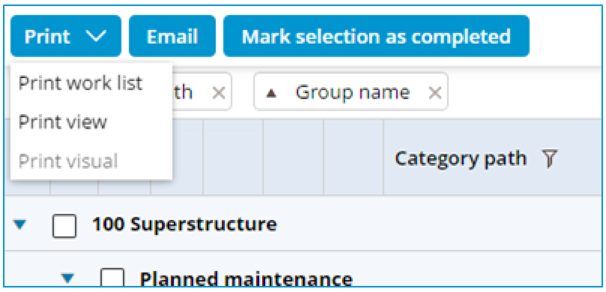


MXSuite will display a list of maintenance tasks that need to be performed. The structure of this list depends on the view settings.

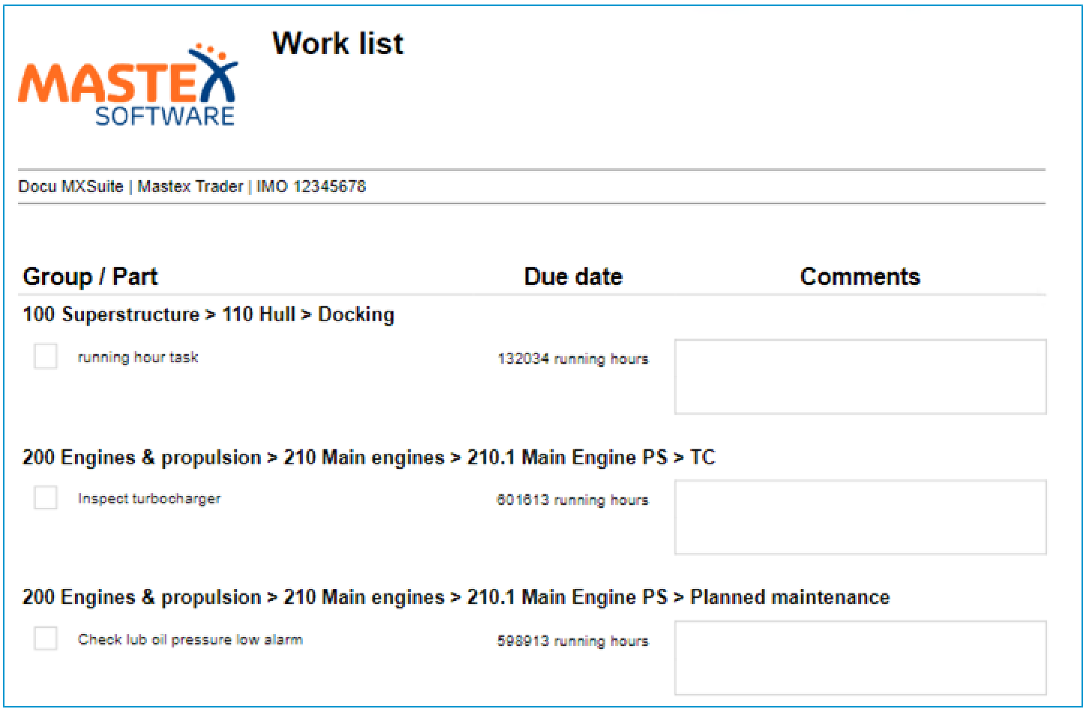
The list of tasks can be printed in two ways.

- Click **Print view** to print the current view
- Click **Print work list** to print the current job with a wider view. More options are available for this print, such as ticking a box to indicate that a task has been completed and adding a comment

to a task



- Here is an example of a printed work list.



4.2 How do I know which orders to process?

Click on **Orders to do**.

This overview displays purchase orders that require the current user to perform a certain action. The order can be finalized in this overview.

Follow the steps below to process an order:

1. Double-click on the order to be processed
2. Click on an action
3. Click on **Ok**

The list with orders can be filtered by status using the buttons at the top.

4.3 How do I update the running hours?

To calculate maintenance tasks that are linked to running hours, you must first determine the running hour status of the running hour machines.

1. Click on **Counters**
2. Click on **Update**
3. Enter the running hours per machine
4. Click on **Save & close**

On board the input window will appear as a pop-up every 7 days when you login to MXSuite.

> **Note:**
> If the calculated weekly average is higher than 168 hours, you will not be able to save new running hours. If you are sure about the entered running hours, manually change the average to a value between 0 and 168. You will then be able to save the running hours.

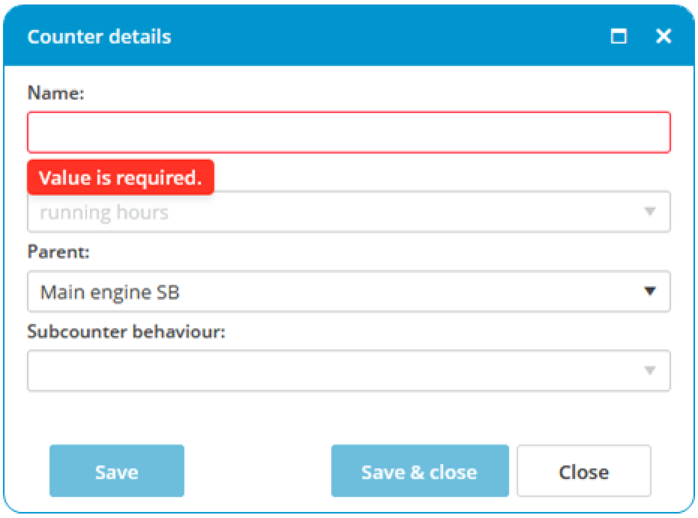
4.4 How do I create a new running hours machine?

1. Click on **Counters**
2. Click on **New...**
3. Enter the name and select the unit
4. Click on **Save & close**

4.5 How do I add subcounters?

1. Click on **Counters**
2. Click on **New...**
3. Fill in the details for the sub-counter

4. Under **Parent,** select the parent-counter for the sub-counter



5. Click on **Save & close**

Information:

Sub-counter behavior: There are multiple options to change the behavior of the sub-counters of a parent-counter.

- Add delta value to sub-counters: The sub-counters will be updated by the main counter.

- Fill main counter with highest value: The main counter will be filled with the highest value from all of the sub-counters.
- Fill main counter with lowest value: The main counter will be filled with the lowest value from all of the sub-counters.
- Fill main counter with average value: The main counter will be filled with the average value from all of the sub-counters.

4.6 How do I use the docking overview?

In addition to time-related tasks and tasks based on running hours, there are also docking tasks. The docking overview shows all created tasks that are linked to a planned docking. The overview of docking tasks can be filtered based on the status of the task. You can also use the search bar.

Tasks that have been linked to a docking can be identified by the gear symbol. The colour of the symbol indicates the status:

 This task is planned for a future docking

 This task is planned for a docking that is currently being carried out

This task is planned for a docking that has already been carried out

The list with docking tasks can be printed or sent by email by using the corresponding buttons at the top of the screen.

In addition to the task overview, the planned docking periods are also illustrated in a graph. This view is based on the module Certificates, which also shows an overview of docking periods.

4.7 What is the status of my annual budget?

1. Click on **Budget**
2. Select the year of the budget you want to see

As soon as you click on a line, the selected budget is also visualized in a graph.

4.8 How do I see an overview of all document tasks?

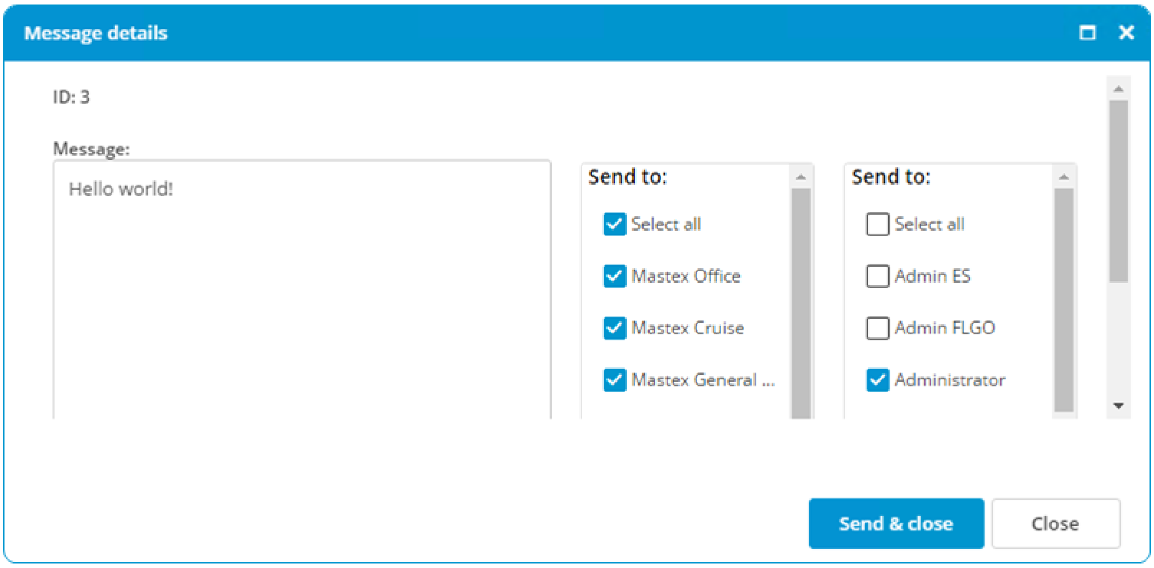
Click on **Tasks**.
In Tasks, an overview is displayed of all tasks that are linked to a document from the module Documents.
Click on a task to view and edit the information. Document tasks are generally created in the module Documents, but they can also be created in this overview by clicking on **New...**

> **Tip:**
> If you select User view, only tasks of relevance to the current user will be displayed.

4.9 How do I send a message to another user?

Messages can be sent between the office and the ships using Messenger.
1. Click on **Messenger**

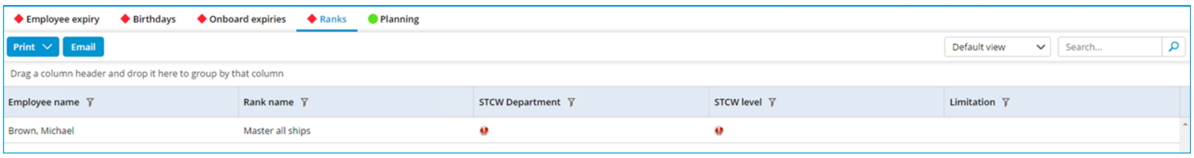
2. Click on **New**



3. Write your message
4. Select **Location** and user (if applicable)
5. Click on **Send**

4.10 How do I know which of my crew members' documents are about to expire?

Warnings not only gives you an overview of the documents that are about to expire, it also provides additional information, such as birthdays and a list of people for whom the known qualifications do not correspond to the rank entered.



Tabs:

Employee notification: This provides an overview of the crew members' expired documents.

Birthdays: This view provides an overview of the crew members born on this day. In the module Crewing, you can specify a certain period to create a list of all birthdays such as in the past seven days, today, and the next seven days.

On board expiries: This shows the expired documents of crew members currently planned to be on board.

Ranks: This shows the crew members whose rank as listed in the General tab does not correspond to their known qualifications and educations.

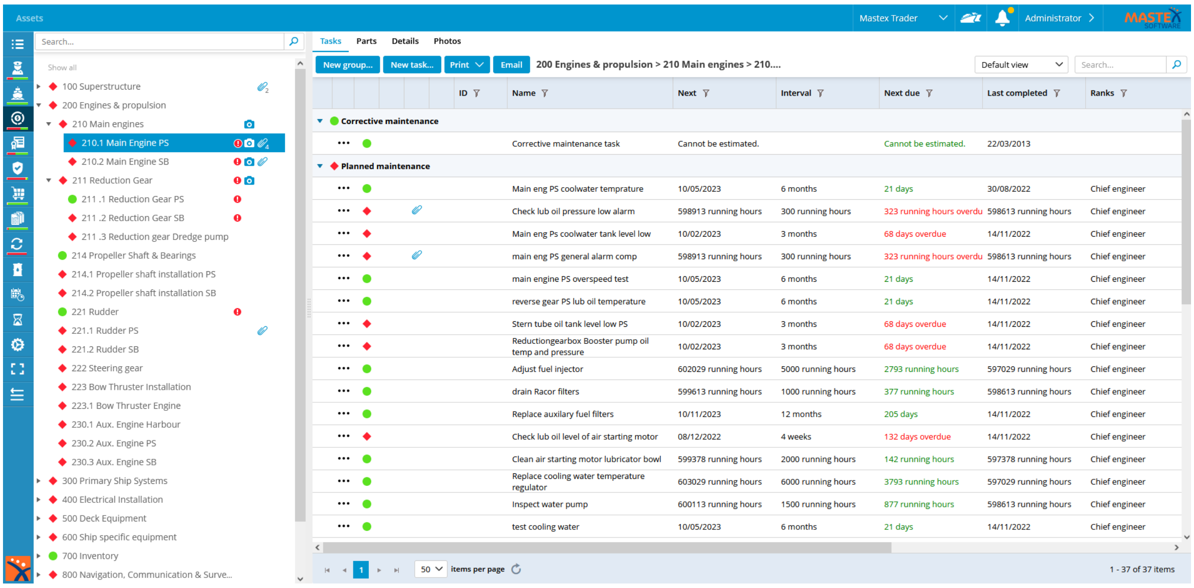
Planning: This shows the planning warnings, such as failure to meet the safe manning requirements.

4.11 How do I check for a new version?

1. Go to the module **Summary**
2. Click on **About**

   The latest version number will appear.
3. Click on **Check for Updates...**
4. Follow the steps in the installation wizard

5 Assets Tasks



The module Maintenance is designed to register all maintenance tasks. Maintenance tasks can be based on running hours or on time intervals. As soon as a task is scheduled, it is added to the work list.

The module Maintenance can be used to relate tasks together. This functionality is meant for machines that have identical maintenance schedules. Changes to a maintenance task within a related job will be implemented in all other related maintenance tasks.

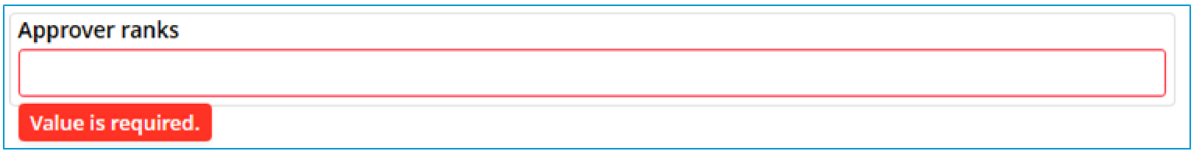
5.1 What does Requires Approval do?

The requires approval function makes sure a task is correctly executed.

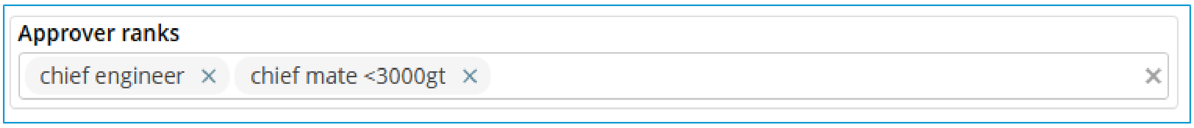
When this option is ticked when creating a task, you can select different ranks which can approve the execution of this task.

This can be done within the section **Approver ranks.**

1. Select **Requires approval**
2. Select the desired ranks within the **Approver ranks** field.



It is possible to select multiple ranks which can approve this task.



5.2 What does the fixed interval option do?

The fixed interval option can be selected when you create a:

- maintenance task
- safety drill

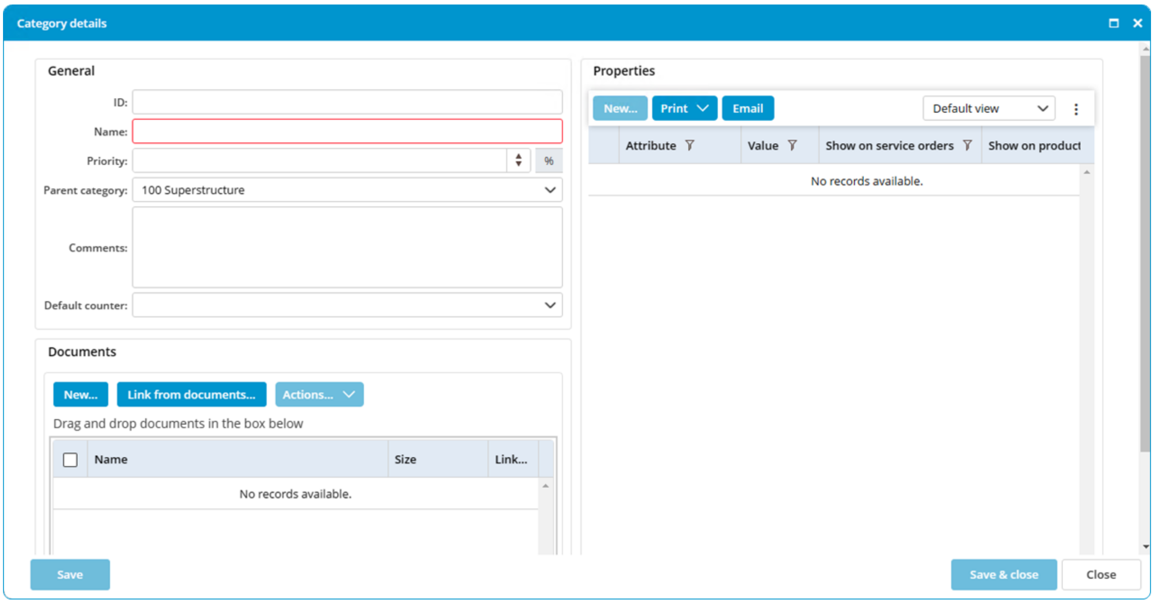
The following table clarifies what this option does.
A task or a drill has an interval of one month.

	No fixed interval	Fixed interval
Expiration date	1 January	1 January
Date of first execution	3 January	3 January
Next expiration date	3 February	1 February
Date of second execution	6 February	6 February
Next expiration date	6 March	1 March

With a fixed interval, the next expiration date is always calculated from the first expiration date.

5.3 How do I create a new category?

1. Right-click on a category. The new category will be created as a subcategory of the selected category. To create a new main category, click on an empty part of the tree structure
2. Click on **New category...**
3. Complete all required fields



4. Click on **Ok**

Tip:
If you clicked on the wrong category in step 1, you can change the parent category in this window.

5.4 How do I hide categories and make them visible?

Hide a category:

1. Right-click on a category and select **Hide category**
2. The category is now hidden

Make a category visible: (This is only possible when the remark **Some categories are hidden** can been seen at the bottom of the tree structure)

1. Right-click under the final category in the tree structure and select **Show hidden categories**
2. The categories are now visible again

5.5 How do I copy or move a category, job or task?

1. Right-click on a category, group or task and select **Copy...** or **Move**...
2. Select the location to which the category must be copied or moved
3. Click on **Save & close**

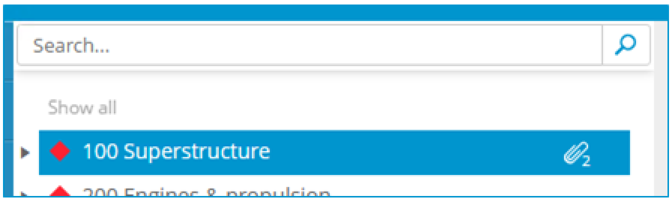
When moving a category, you will be prompted to copy the history as well. If you select this option, a copy of the history will be moved to the new location. If you do not select this option, the history will only be available in the current location.

Note:
A new expiry date will be calculated for time-specific tasks copied to the new location. This is calculated as follows: expiry date = date + interval.
The date used:

- The birth date of the ship, as listed on the docking certificate
- The current date, in the absence of a docking certificate

5.6 How do I search for a category?

Use the search bar at the top of the tree structure to search for a category.

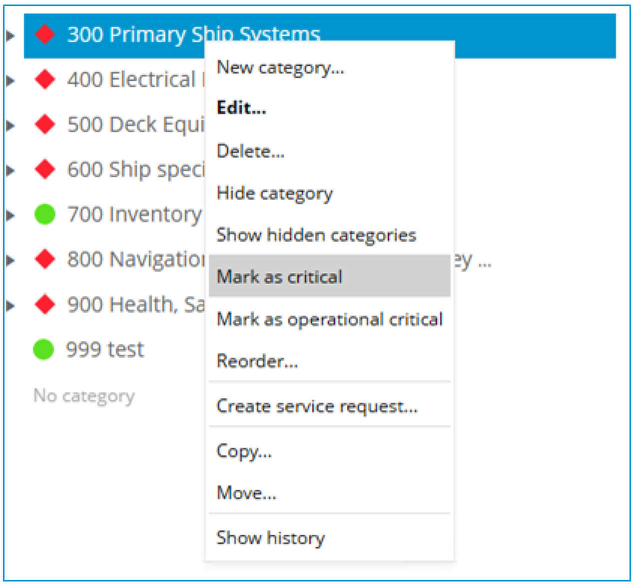


1. Enter the name or partial name of the category.
2. Click on
3. The tree structure will now only show the categories in which the search term appears.

> **Tip:**
> To display all categories, delete the search term and click on .

5.7 How do I mark a category as critical?

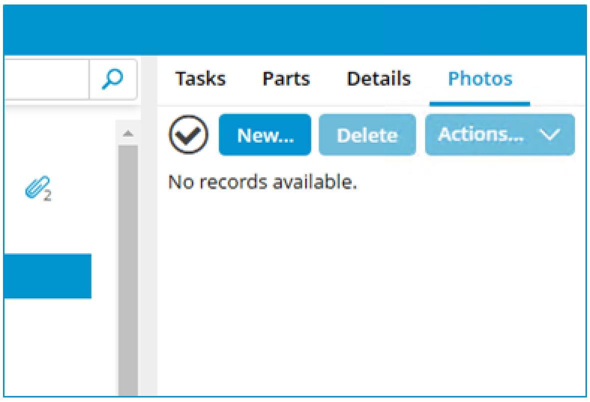
Right-click on a category and select **Mark as critical**.



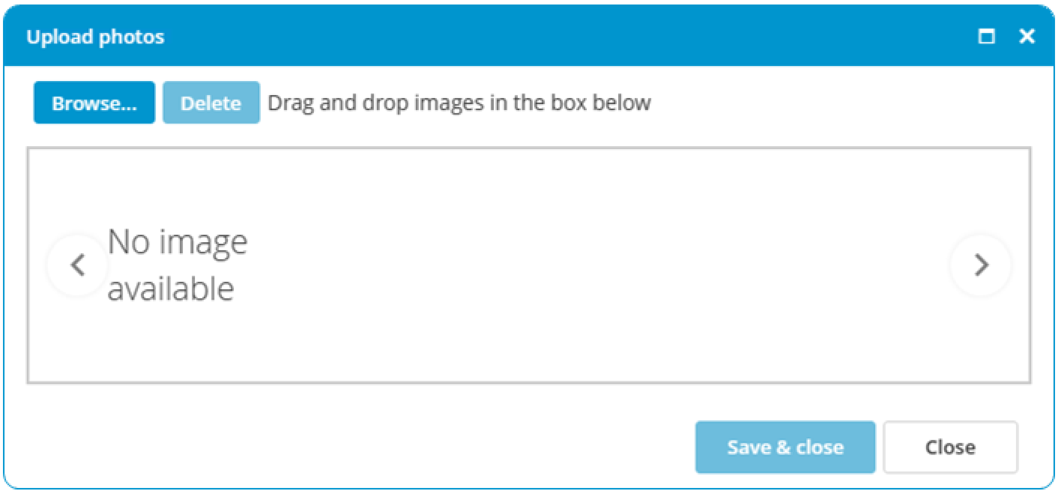
A red symbol will appear behind the category name to indicate the critical status of the category. You can filter the work list to only display categories that have been marked as critical.

5.8 How do I add a photo to a category?

1. Right-click on a category and select **Edit category...**
2. Click on **Photos** > **New...**



3. Click on **Browse...**

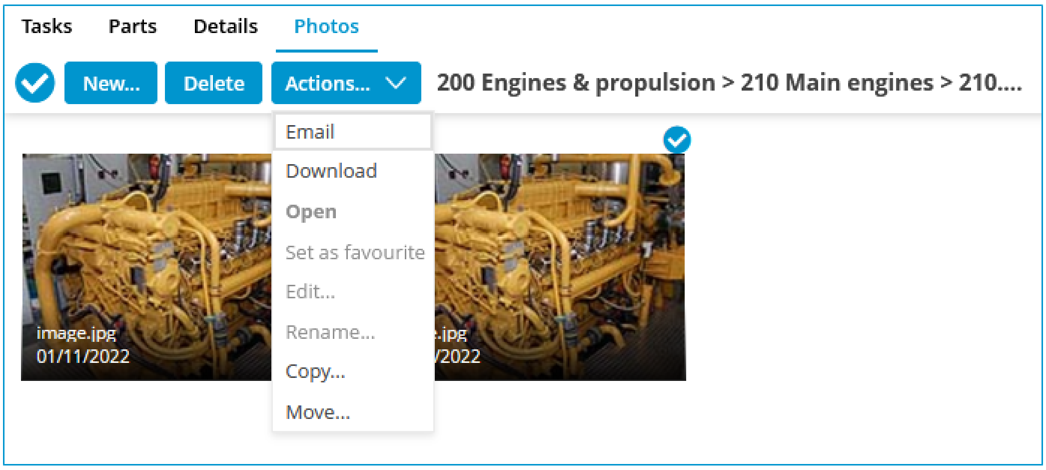


4. Select the images
5. Click on **Save & close**

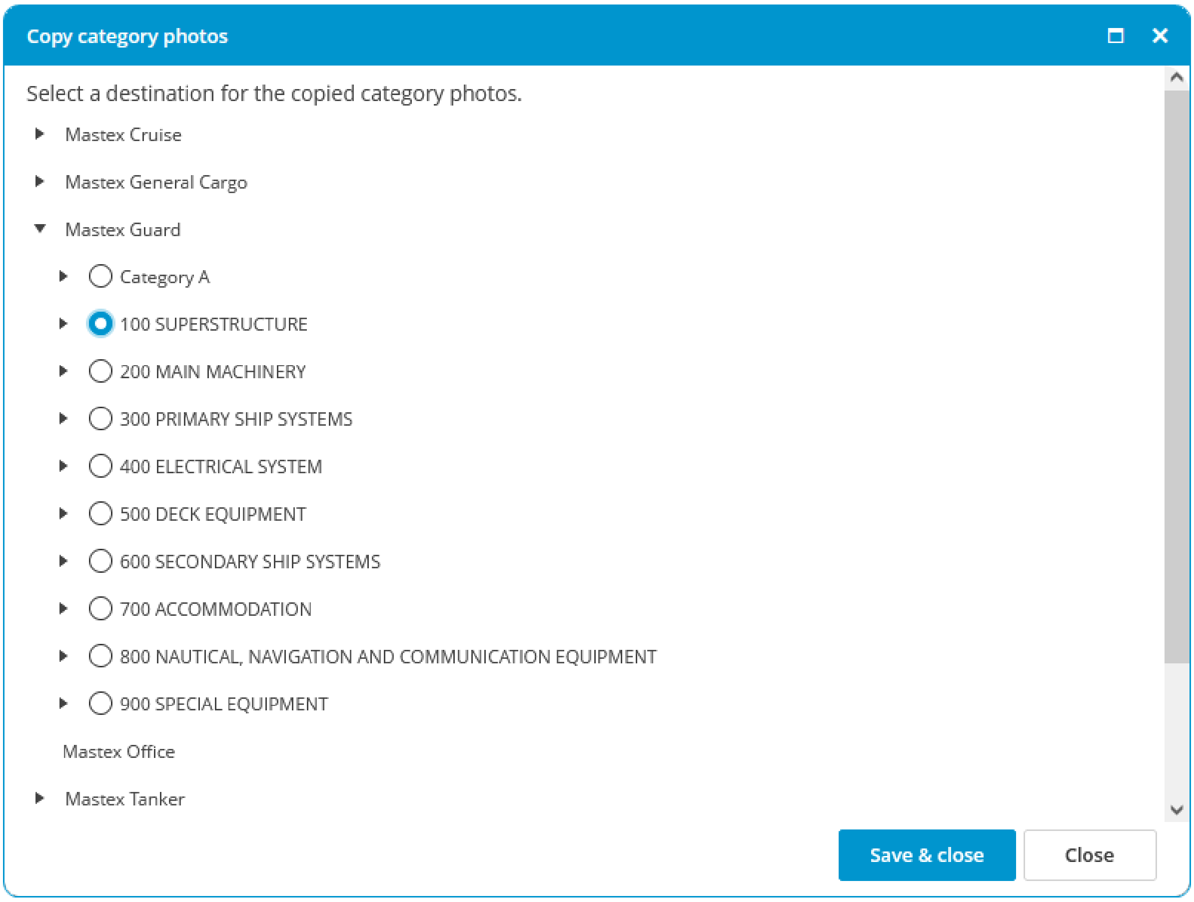
Note:
Permitted image formats are: .BMP .DIB .RLE .JPG .JPEG .JPE .JFIF .GIF .TIF .TIFF .PNG

5.9 How do I copy or move photo's between categories?

1. Select the photo's you want to copy
2. Click on **Actions... > Copy**



3. Select the category the photo's need to be copied to



4. Click **Save & Close**

5.10 How do I change the order of a category, job or task?

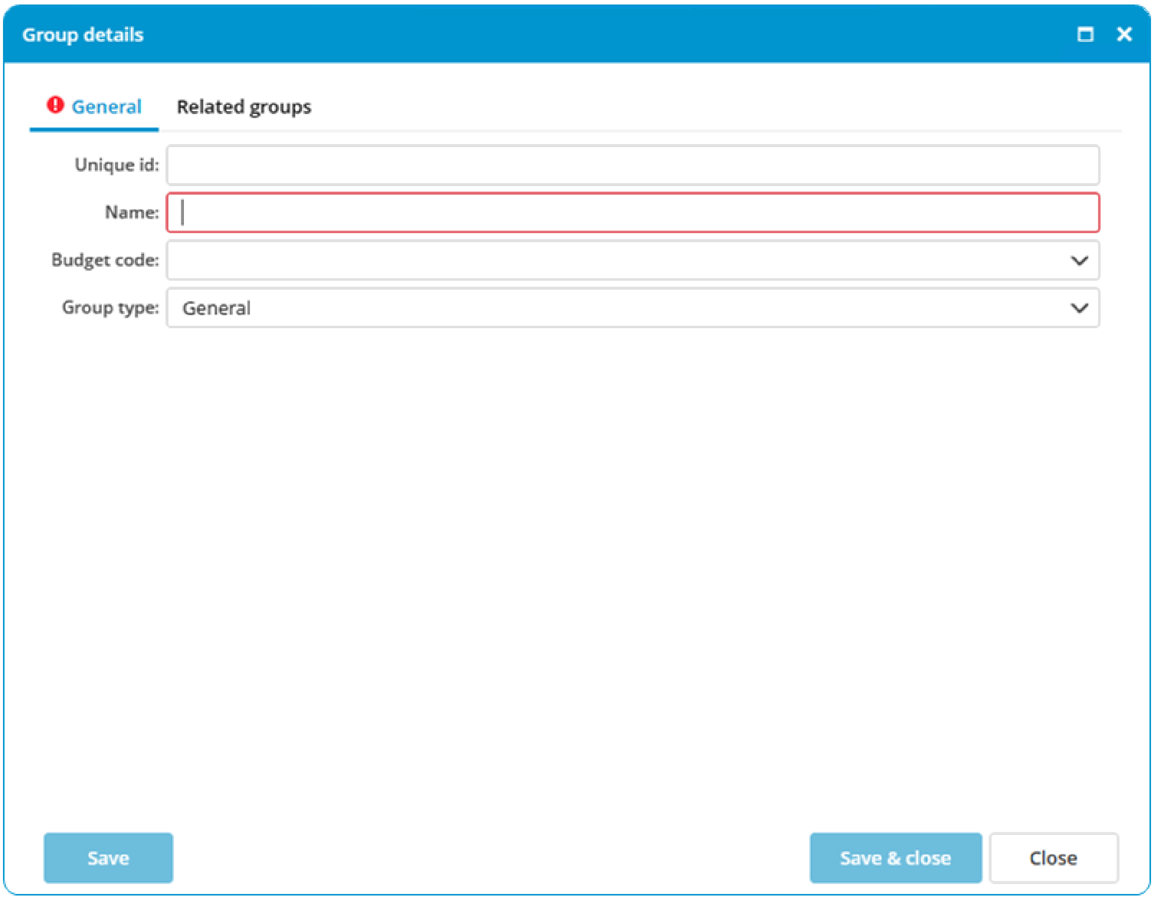
The same process is used to change the order of a category, group or task in MXSuite.

1. Right-click on a category, group or task and select **Reorder...**
2. Select a line and use **Move up** and **Move down** to change the order
3. Click on **Save & close**

5.11 How do I create a group?

A group is used to group tasks. This makes it easier to place all tasks with the same interval in one group. This also makes it possible to mark all tasks in a list as done.

1. Click on **New group...**
2. Complete all required fields



3. Click on **Save & close**

5.12 How do I relate groups?

This functionality is meant for machines that have identical maintenance schedules. Changes to a maintenance task within a related job will be implemented in all other related maintenance tasks. The current opened job is used as the reference. When a job already contains assigned tasks, these tasks will be copied from the reference. Tasks with the same ID are considered the same task.

For example:

This is the situation before relate the group.

Group machine A	ID	Tasks	Group machine B	ID	Tasks
Planned maintenance	1.1	Replace the filter	Planned maintenance	1.1	Replace the filter
	1.2	Check level of lubricating oil		1.2	Refresh oil
	1.3	Refresh oil		1.5	Measure battery voltage
	1.4	Measure battery voltage			

Below you will find the situation after the group is related to another group.
The relationship was created from the group of machine A. The task with ID 1.5 of machine B was removed after the group was related. The name of task ID 1.2 was made identical to that of task ID 1.2 of machine A. Additionally, task ID 1.3 and 1.4 were added to machine B.

Group machine A	ID	Tasks	Group machine B	ID	Tasks
Planned maintenance	1.1	Replace the filter	Planned maintenance	1.1	Replace the filter
	1.2	Check level of lubricating oil		1.2	Check level of lubricating oil
	1.3	Refresh oil		1.3	Refresh oil
	1.4	Measure battery voltage		1.4	Measure battery voltage

Which fields will be related?

All fields will be equalised, except the expiry date and the expiry running hours, which may differ.

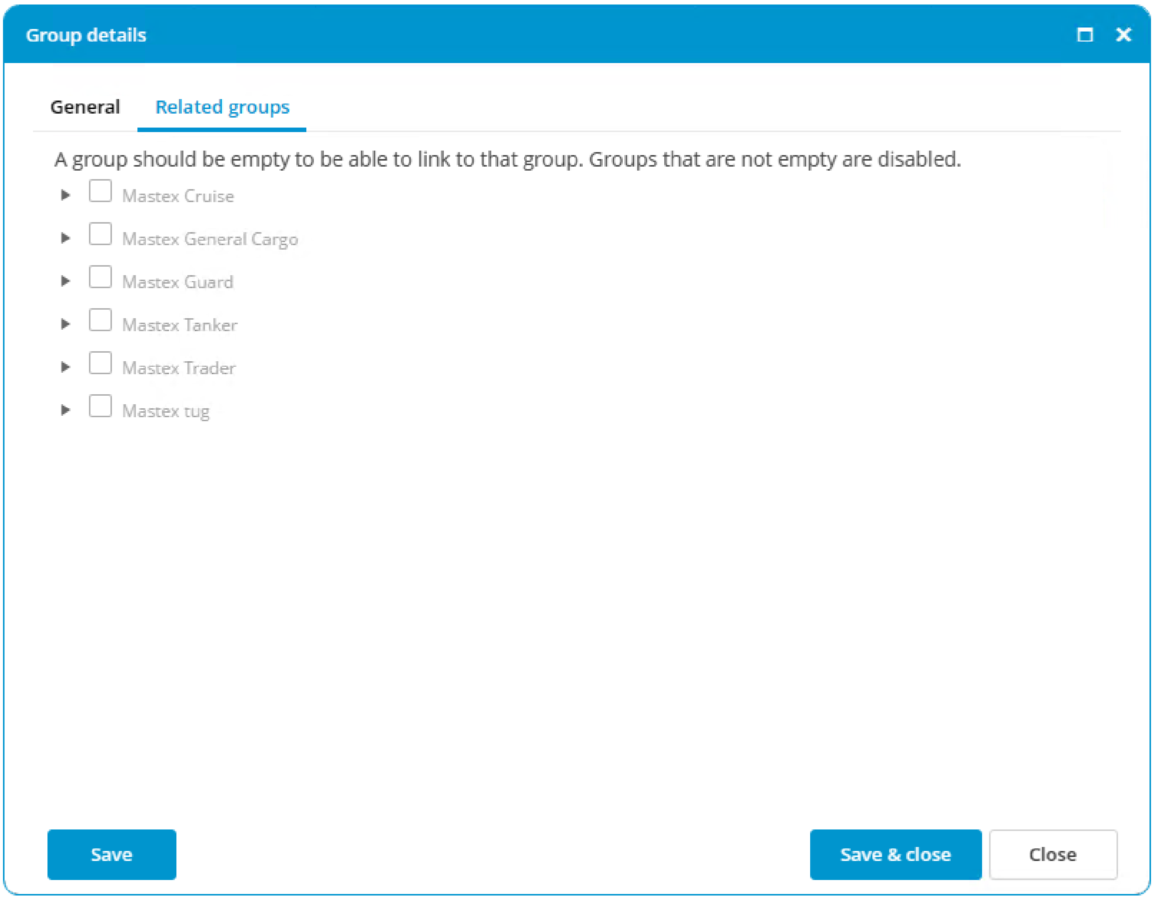
Roadmap:

To relate groups, the following conditions must be met:

- In the property settings for a machine, **Preferred running hour** must be selected
- All tasks in the job must have an **ID**
- The relationship must be made in the office version

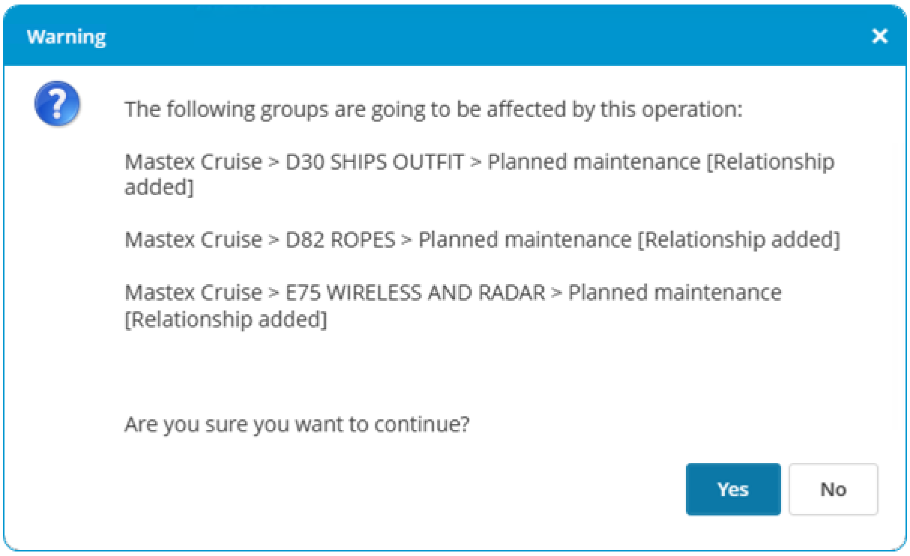
Note:
Existing tasks with the same description, should have the same ID before the relationship is made. If this is not the case, the tasks will be overwritten.

1. Right-click on the group and then click **Edit group...**
2. Click on the tab **Related groups**
3. In the tree diagram, select the group that should contain the same tasks. It is possible to select more than one group



4. Click on **Ok**

5. An overview of the selected relationships will appear



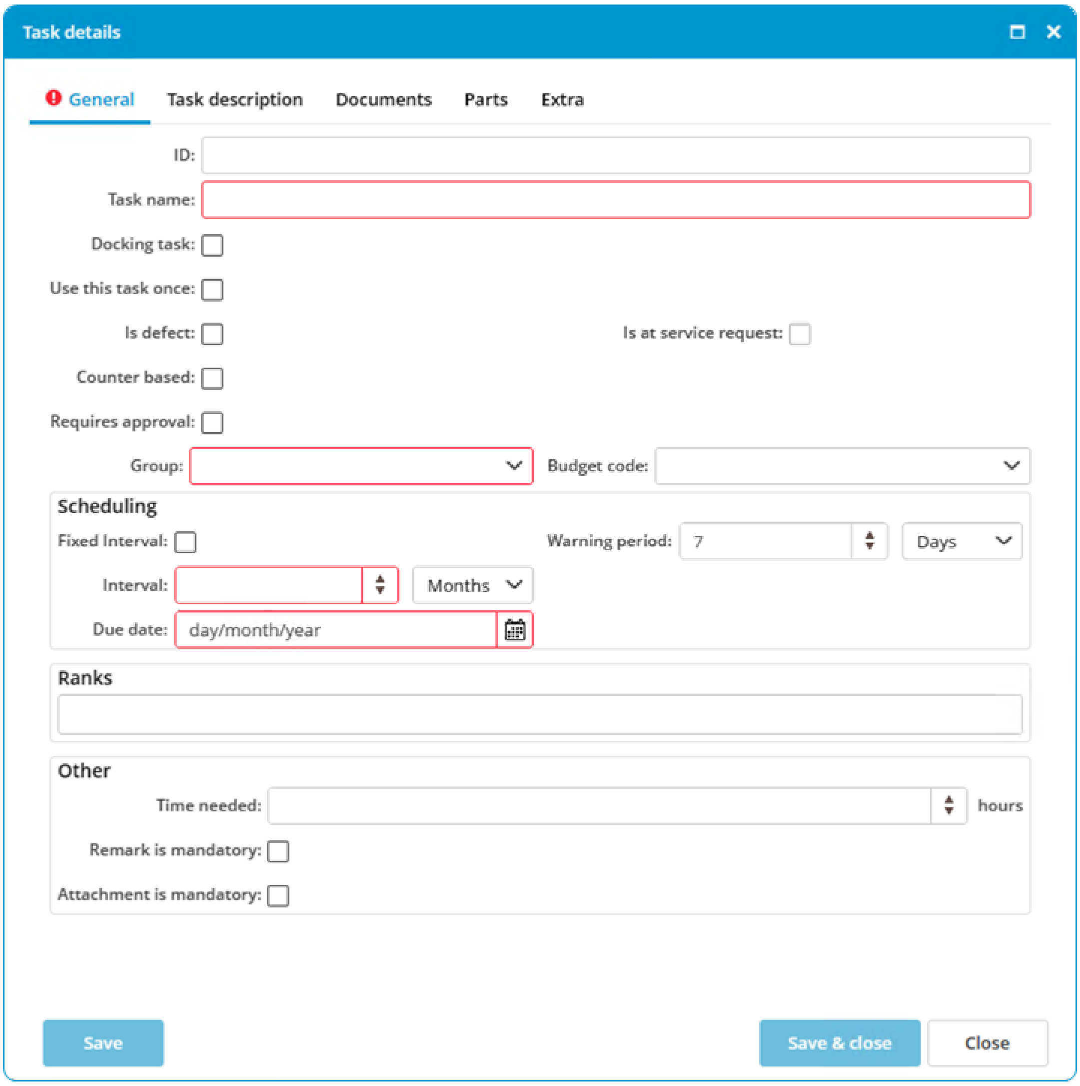
6. Click on **Yes** if the overview displays the right groups

Note:
This feature is only available in the office version and cannot be used for the Corrective Maintenance group because these involve one-time tasks.

Important:
Failure to correctly perform the mentioned steps to relate groups can result in data loss!

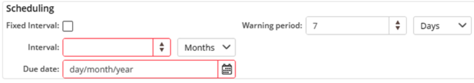
5.13 How do I create a maintenance task?

1. Click on **New task...**



2. Fill out all the fields.
3. Select a **Group.**
4. Select one of the following options:

Time interval (default)

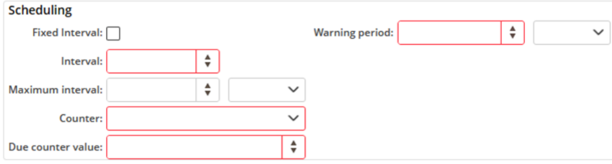


Enter an **Interval** and select day, week or month.
The **Due Date** is calculated based on today's date + interval.

Extra option:

- Fixed interval

Running hours linked

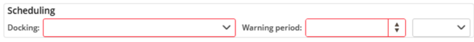


Enter an **Interval** and select a **Running Hours Machine**.
Enter the **Due Running Hours**. If the current running hours status has been entered, the hours will be added automatically.

Extra options:

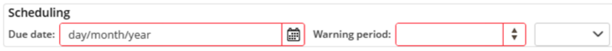
- Fixed interval
- Maximum interval
  Enter an interval and select day, week or month. This option allows you to perform a task with time intervals in addition to running hours.

Docking task



Select the **Docking** period.

Use this task once / Defect



Select when the task should be performed.

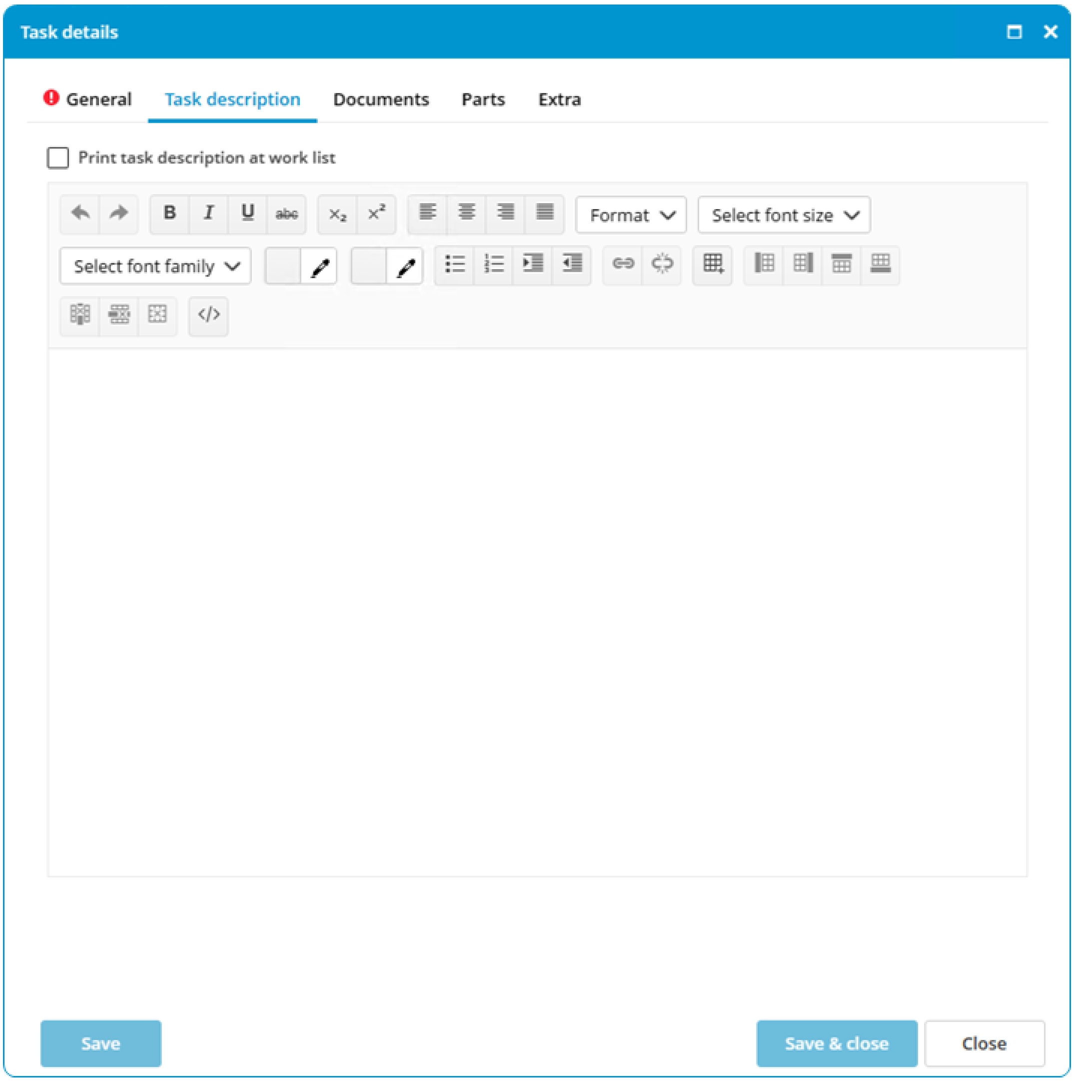
5. Click on **Ok**

Optional:

ID: This is a unique number that will be added before the task description.
Ranks: Select one or more ranks. Only users with one of these ranks can see the task on the job list.
Other > Time needed: Specify how many hours are needed to perform this task.
Other > Remark is mandatory: When you sign off on a maintenance task, the comments field is required.
Other > Attachment is mandatory: When you sign off on a maintenance task, it is required to add a task completion document.

5.14 How do I make the task description visible in the work list?

1. Open the task and go to the tab **Task Description**

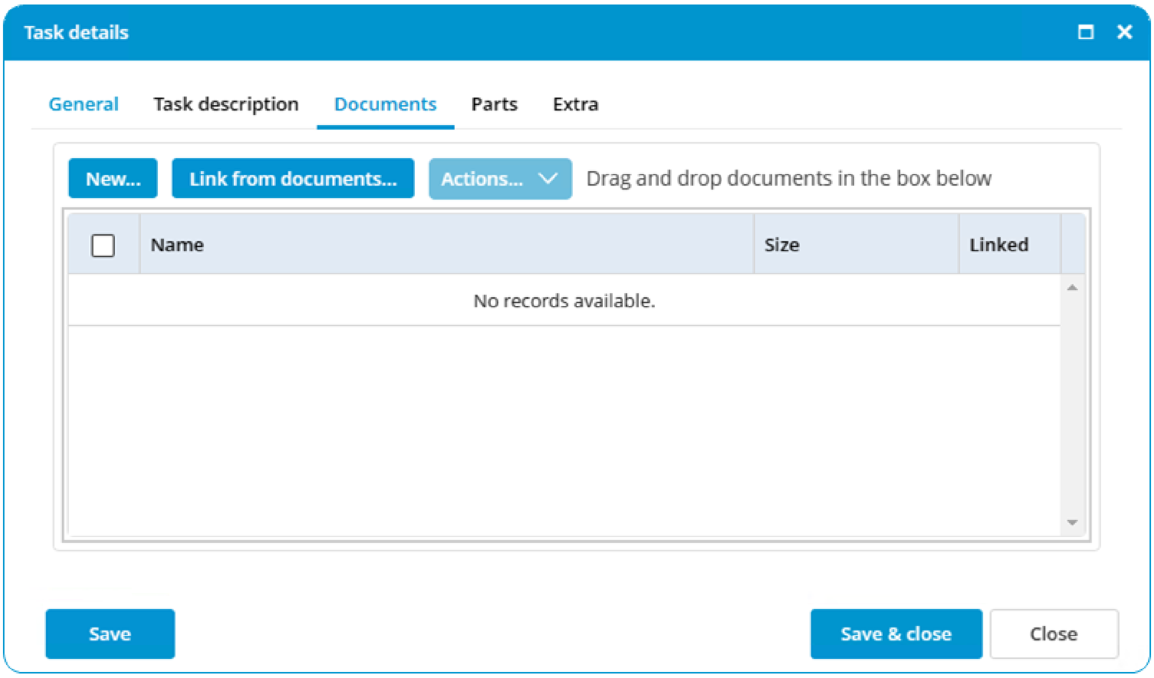


2. Select the option **Print task description at work list**
3. Click on **Ok**

5.15 How do I add documents to a task?

1. Right-click on a task and select **Edit task...**
2. Go to the tab **Documents**

3. Click on **New...** and select the document



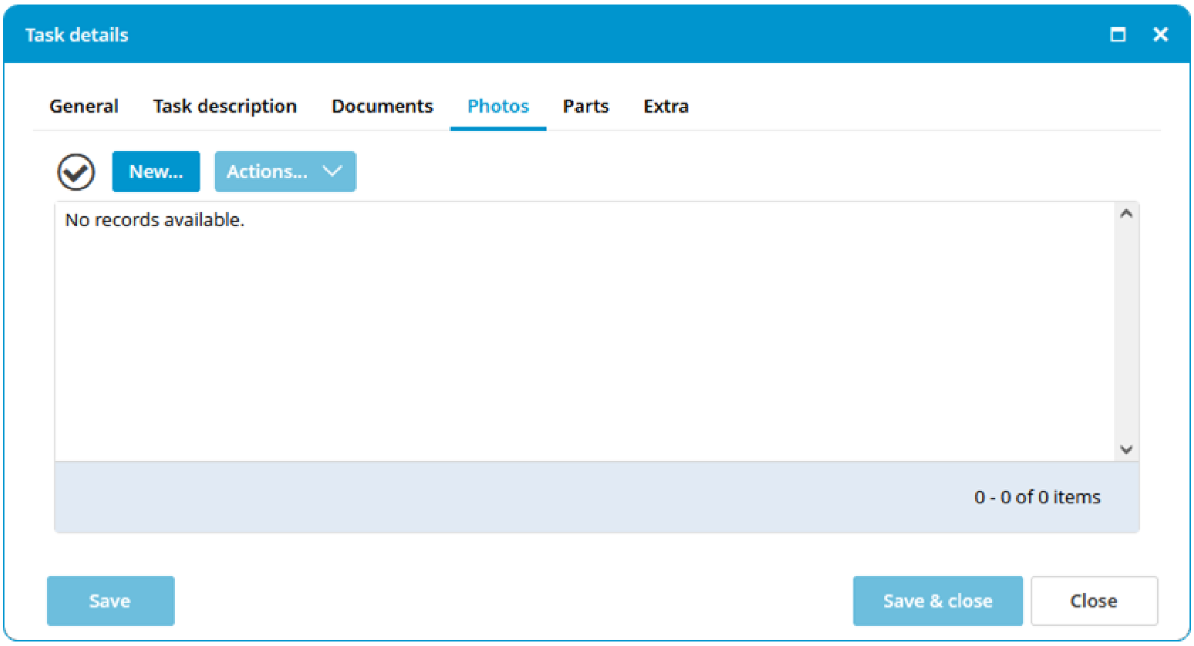
4. Click on **Ok**

Tip:

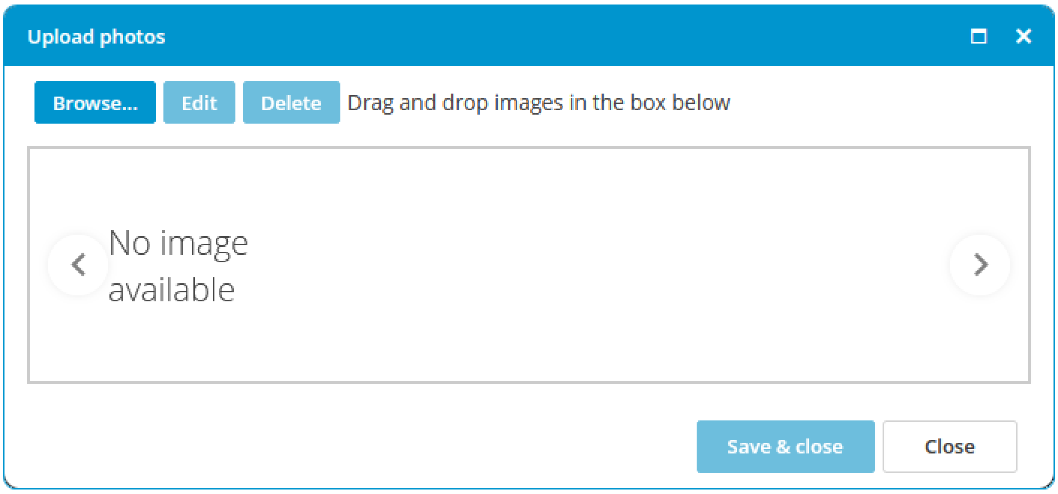
The option **Link from documents...** makes it possible to add a document from the module Documents.

5.16 How do I add photo's to a task?

1. Right-click on a task and select **Edit task...**
2. Go to the tab **Photos**



3. Click **New...**
4. Add new photo's by browsing or drag & drop.

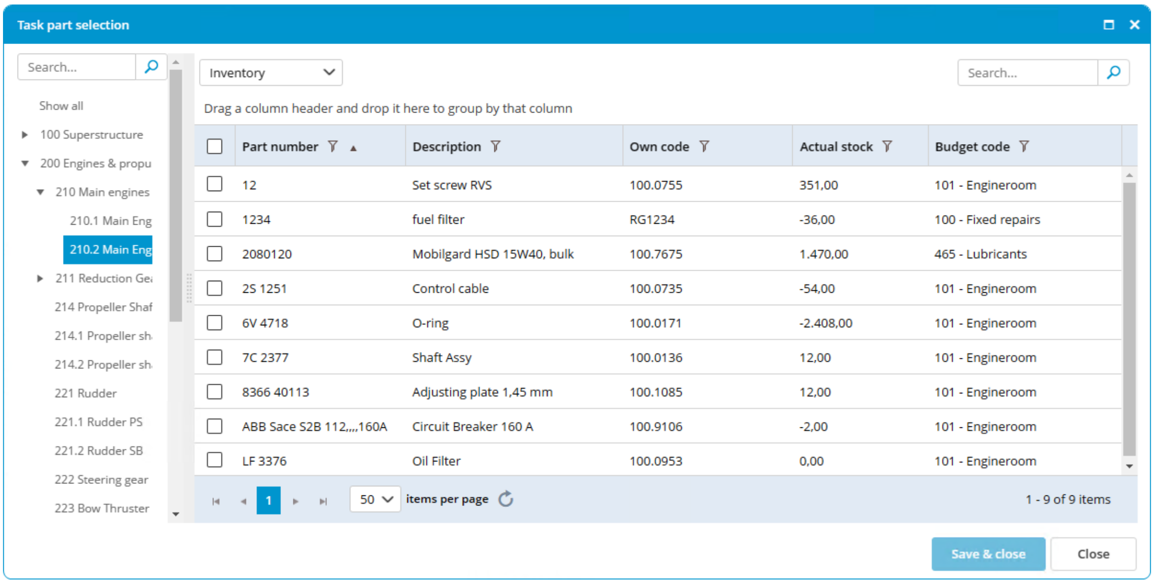


5. Click **Save & Close**

5.17 How do I link spare part(s) to a task?

1. Right-click on a maintenance task and select **Edit task...**
2. Go to the tab **Parts**

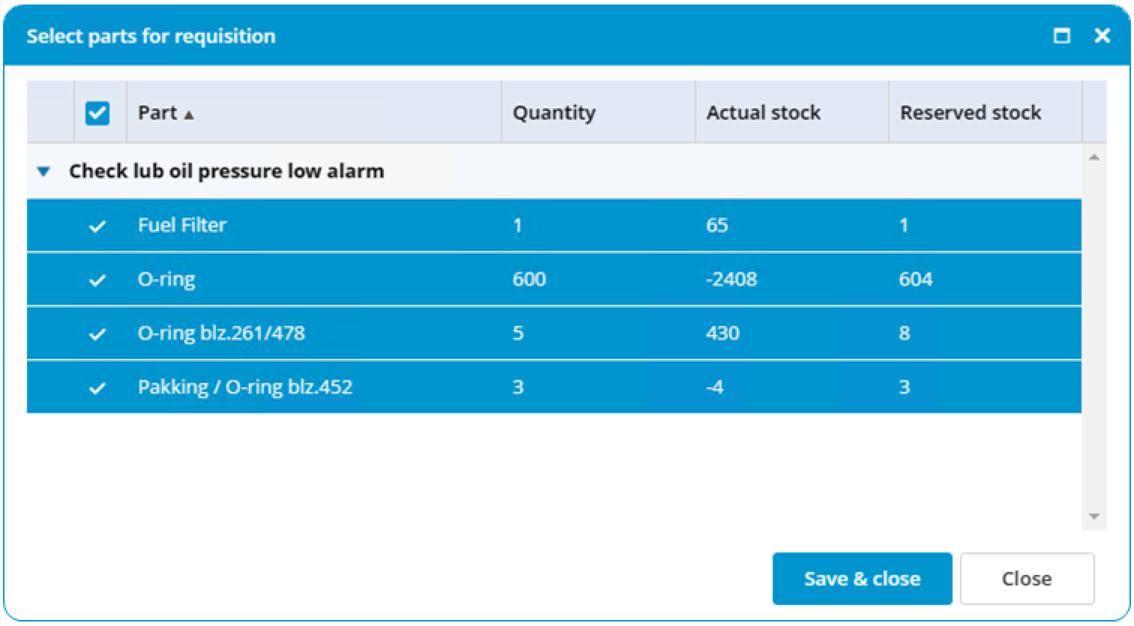
3. Click on **Select Part(s)...**



4. Select the part(s) (you can select multiple parts using Ctrl or Shift)
5. Click on **Ok**
6. Enter the quantity of parts needed. When executing the task, the stock of the selected parts will be updated

5.18 How do I order the required parts for a task?

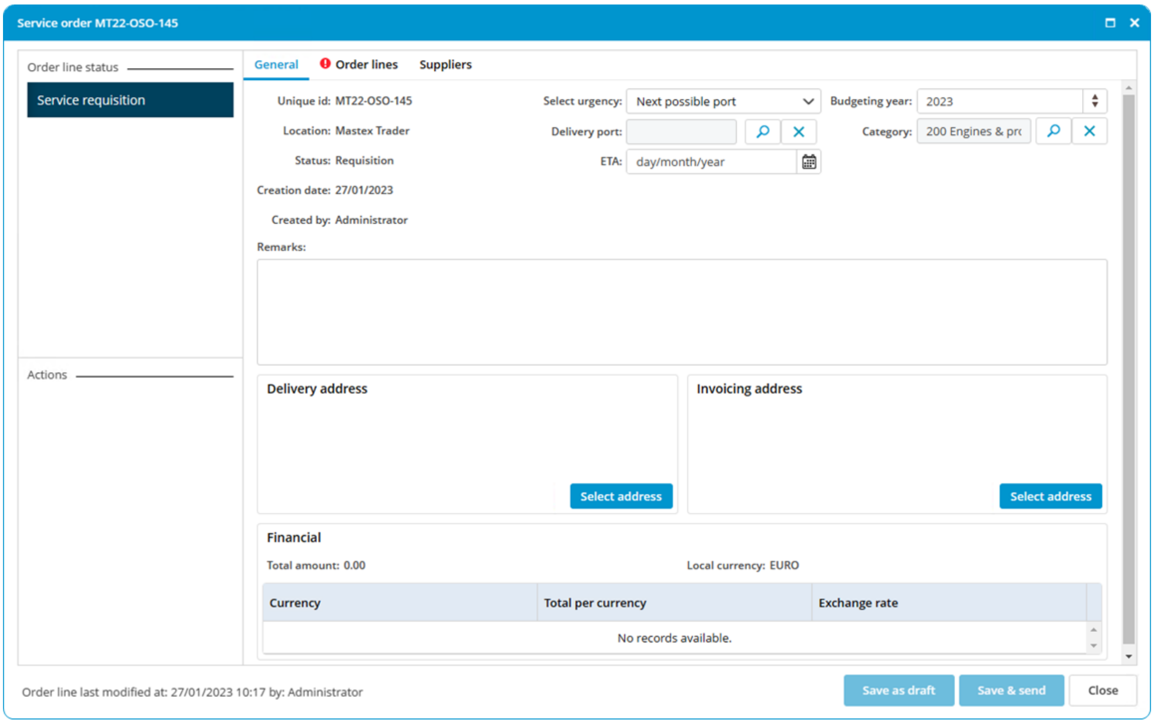
1. Right-click on a task and select **Create requisition...**
2. Select the parts you want to order



3. Click on **Save & close**

5.19 How do I create a service request?

1. Right-click on a category and select **Create service request...**
2. Note in the description the reason for the service request



3. Click on **Save & send**

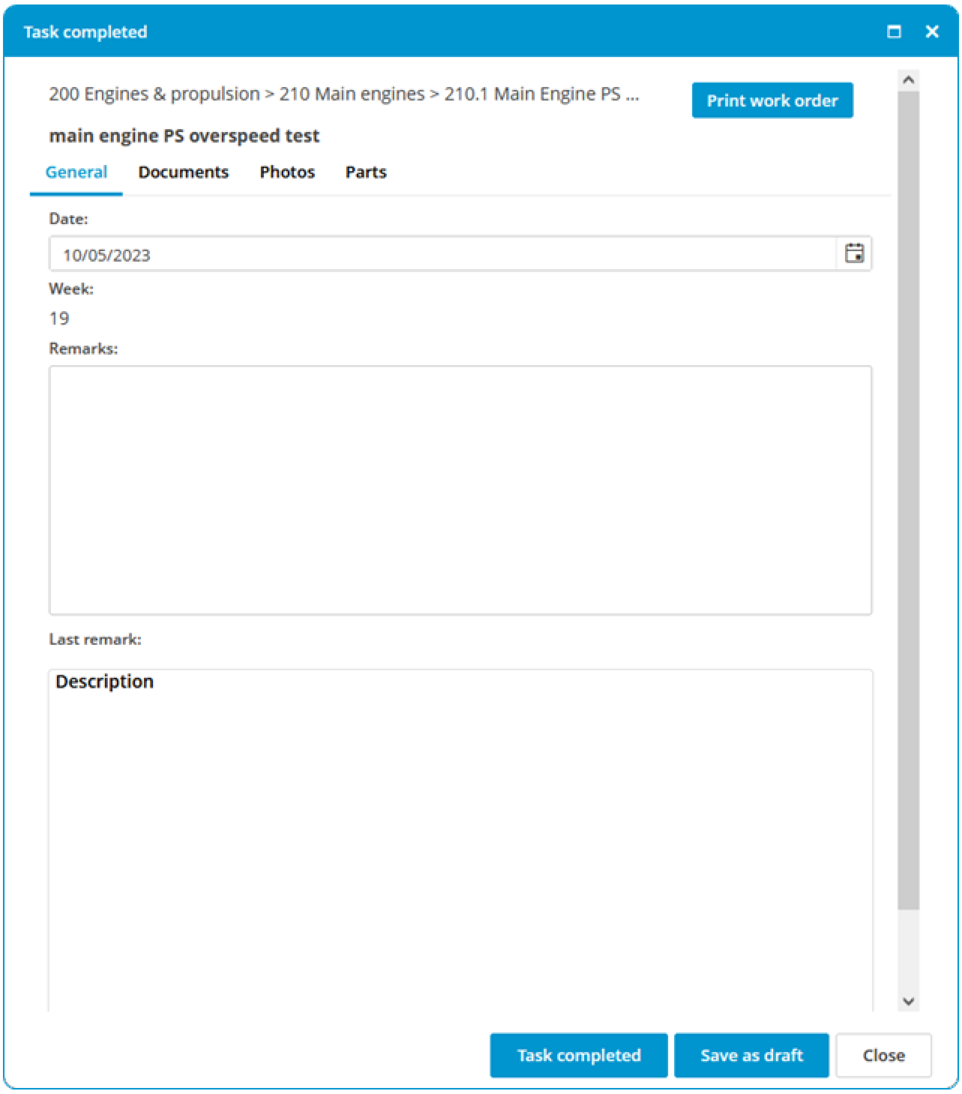
Tip:
If a defect is registered in the category, this defect will also be included in the service request.

5.20 How do I mark a task as complete?

A maintenance task can be performed from the work list and from the module Maintenance.

1. Double-click on a **task**

2. Enter a **Remark**



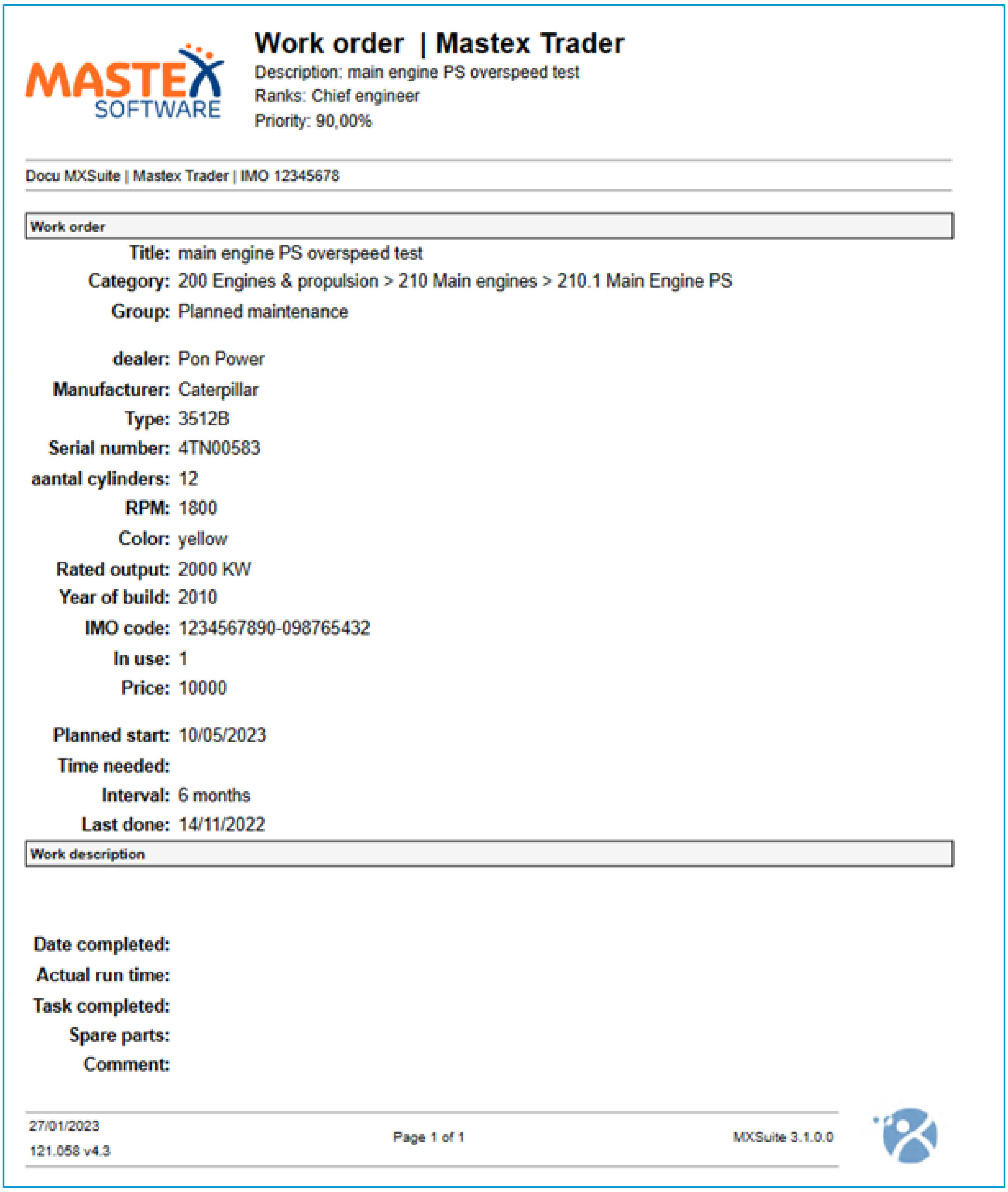
3. Click on **Task completed**
4. The task will be removed from the work list and will be added back to the list at a predetermined interval

Optional:

Documents: Here you can add documents to this task completion.
Photos: Here you can add photo's to this task completion.
Parts: Here you can add parts to this task completion.

5.21 How do I print a work order?

1. Double-click on a **task**
2. Click on **Print work order**
3. The **work order** will open in the standard browser
4. Click on **Print**



MASTEX SOFTWARE

Work order | Mastex Trader

Description: main engine PS overspeed test
Ranks: Chief engineer
Priority: 90,00%

Docu MXSuite | Mastex Trader | IMO 12345678

Work order

Title: main engine PS overspeed test
Category: 200 Engines & propulsion > 210 Main engines > 210.1 Main Engine PS
Group: Planned maintenance

dealer: Pon Power
Manufacturer: Caterpillar
Type: 3512B
Serial number: 4TN00583
aantal cylinders: 12
RPM: 1800
Color: yellow
Rated output: 2000 KW
Year of build: 2010
IMO code: 1234567890-098765432
In use: 1
Price: 10000

Planned start: 10/05/2023
Time needed:
Interval: 6 months
Last done: 14/11/2022

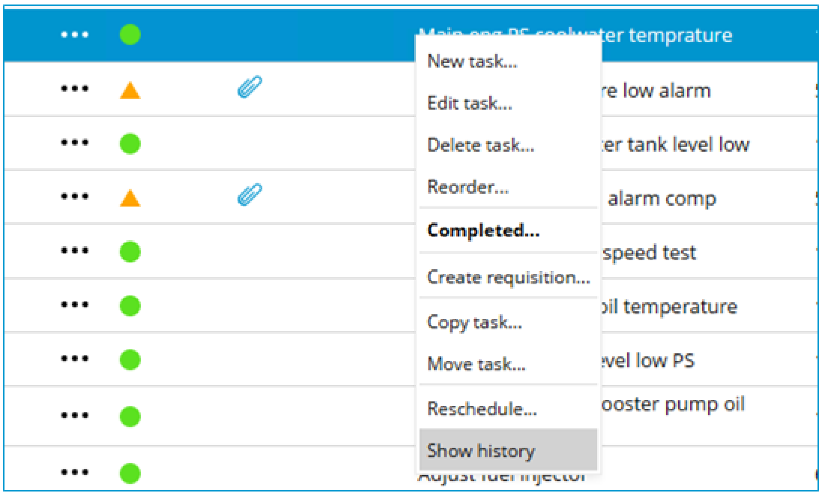
Work description

Date completed:
Actual run time:
Task completed:
Spare parts:
Comment:

27/01/2023
121.058 v4.3
Page 1 of 1
MXSuite 3.1.0.0

5.22 How do I see the history of a task?

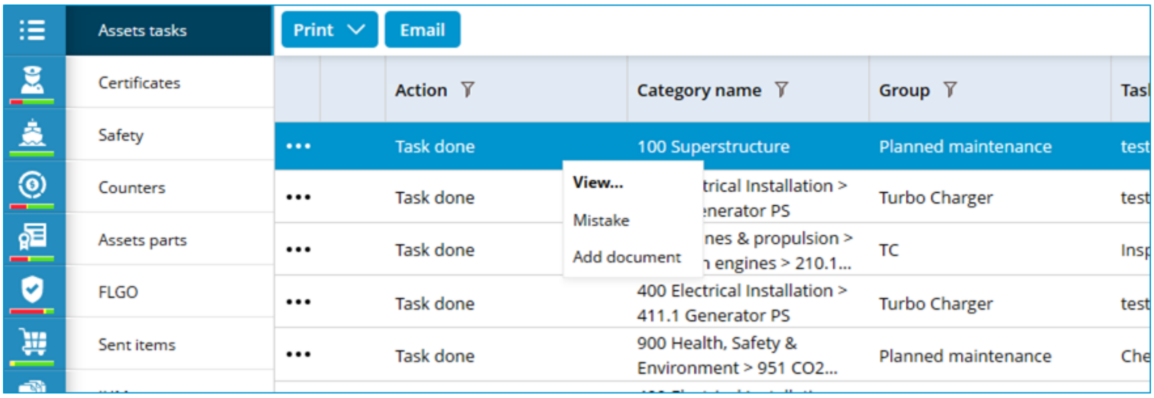
1. Right-click on a task
2. Select **Show history**



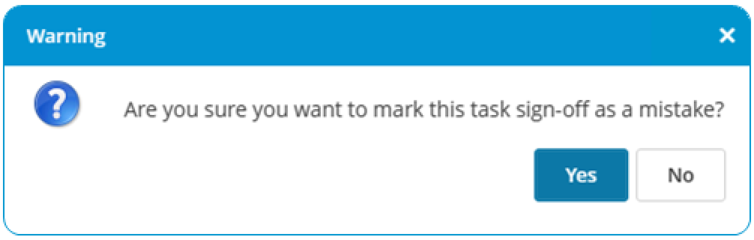
Tip:
Right-click on a category, job or task and select **Show history**. MXSuite will then open the module History and display the data for the selected category, job or task.

5.23 How do I undo a completed maintenance task?

1. Go to the module **History**
2. Select **Maintenance**
3. Right-click on the maintenance task and select **Mistake**



4. Confirm the mistake



5. Click on **Ok**

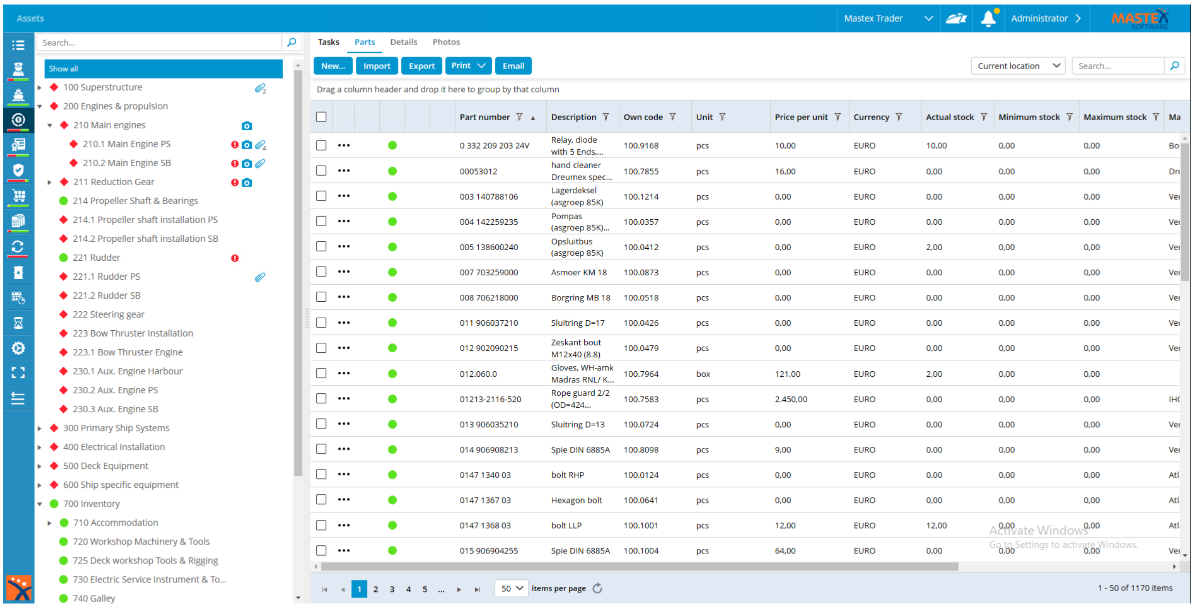
Note:
For each task only the most recently completed task can be marked as a mistake.

5.24 How do I add a document to a completed maintenance task?

1. Go to the module **History**
2. Select **Maintenance**
3. Click on **Search** to search for the relevant maintenance task
4. Once you have found the maintenance task, there are two ways to add the document:
    a. Right-click on this maintenance task and select **Add document**
    b. Double-click on the line or click **View** and then **New** to add the document

Tip:
The option **Link from documents...** makes it possible to add a document from the module Documents.

6 Assets Parts



All parts can be registered in the module Assets Parts. The properties can be saved per part, along with the necessary order information. As MXSuite uses a central database, parts can easily be linked to various ships. The categorization ensures that parts are stored in an orderly fashion.

6.1 What do the colours in the overview mean?

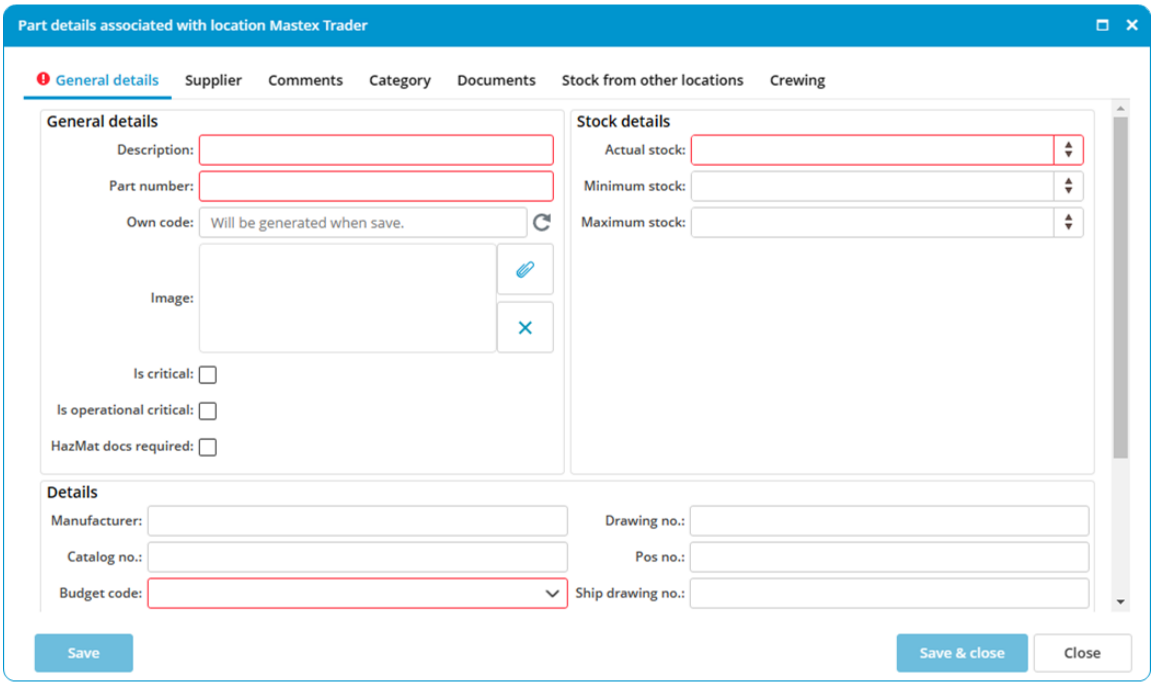
The following colors are used in the overview:

- red: actual stock is less than the minimum stock requirements
- orange: actual stock is not sufficient for executing a maintenance task
- red exclamation mark: this is a critical part

					Part number	Description	Own code	Unit	Price per unit	Currency	Actual stock	Minim
	•••				12	Set screw RVS	100.0755	pcs	1,00	EURO	351,00	200,0
	•••				1234	fuel filter	RG1234	pcs	0,00	EURO	-36,00	20,00
	•••			2	2080120	Mobilgard HSD 15W40, bulk	100.7675	Liter	2,00	EURO	1.480,00	1.500,
	•••				2S 1251	Control cable	100.0735	pcs	0,00	EURO	1,00	0,00

6.2 How do I add a part?

1. Click on **New...**
2. Complete all required fields



3. Click on **Save & close**

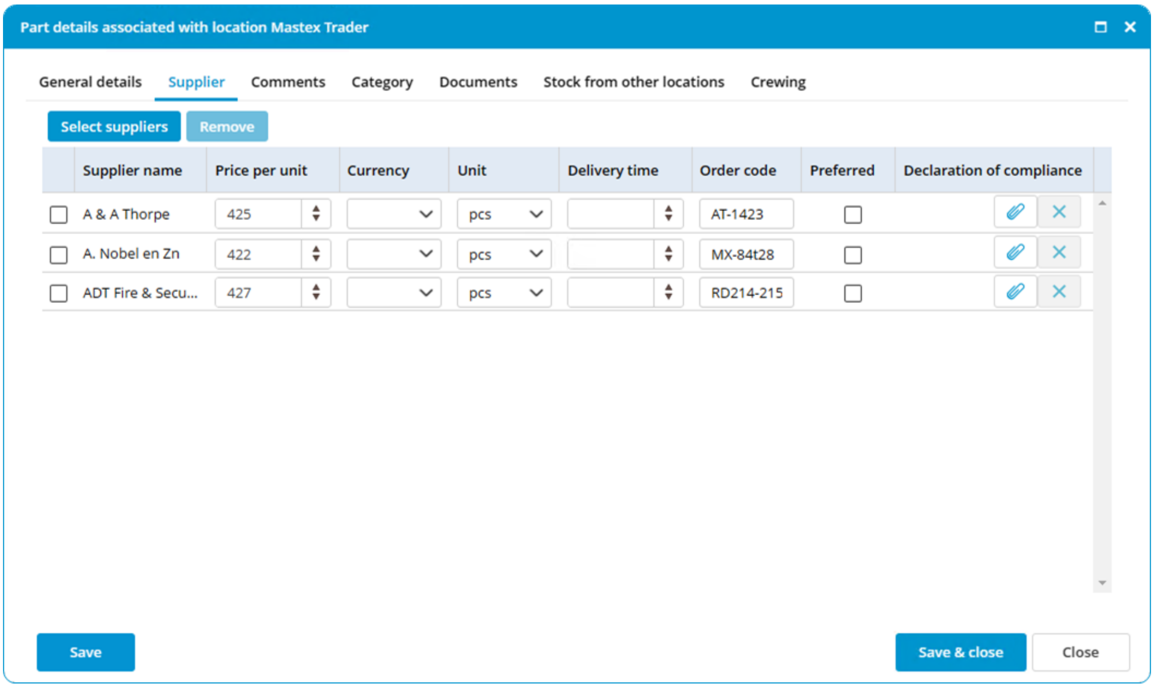
Optional:

Own code: There is an option that allows you to generate the code automatically.
This own code is used as a reference during the import process. During the import process, MXSuite will check whether the part is present using the own code. If the own code is present during import process, the part will be overwritten. If the own code is not present, a new part will be created.

- **Material declaration document**: This function allows you to link a material declaration document to a part. You can find it at **Documents > Material declaration document.**

6.3 How do I link extra suppliers to a part?

1. Right-click on a part and select **Edit...**
2. Go to the tab **Additional suppliers**
3. Click on **Select suppliers** and make a selection
4. Enter the part information for the selected supplier, such as price, unit, order number, Declaration of compliance, etc.



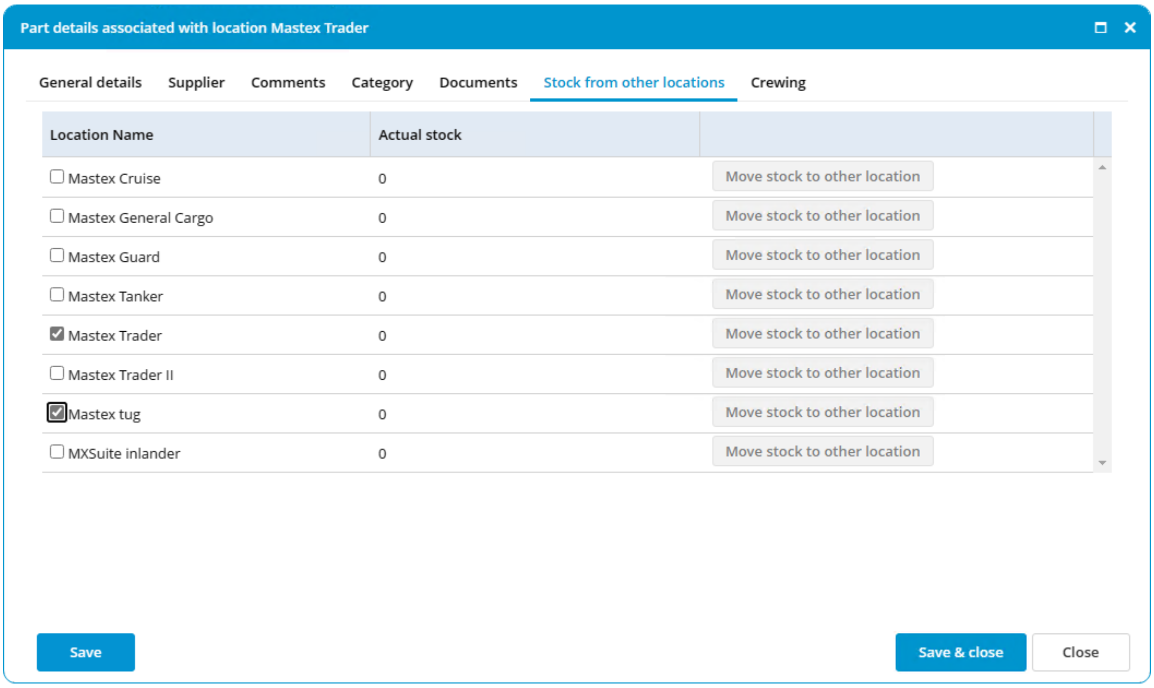
5. Click on **Save & close**

> **Tip:**
> Right-click on the name of an **Extra supplier** and click on **Make preferred** to edit the preferred supplier for this part.

6.4 How do I make a part visible for another location?

1. Right-click on a part and select **Edit...**
2. Go to the tab **Stock from other locations**

3. Select the location where the part must be visible

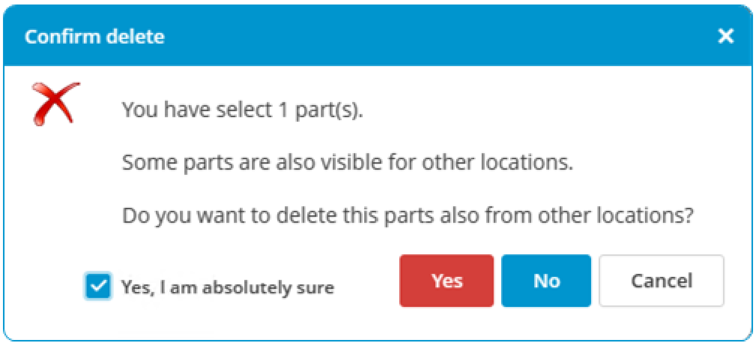


4. Click on **Save & close**

Tip:
Use the **Export** and **Import** feature to assign multiple parts at once to another location.

6.5 How do I delete a part?

1. Right-click on an part and select **Delete...** (you can select multiple parts at once)
2. Click on **Yes** to delete the part from all locations
   Click on **No** to delete the part from the selected location only



6.6 How do I adjust the stock?

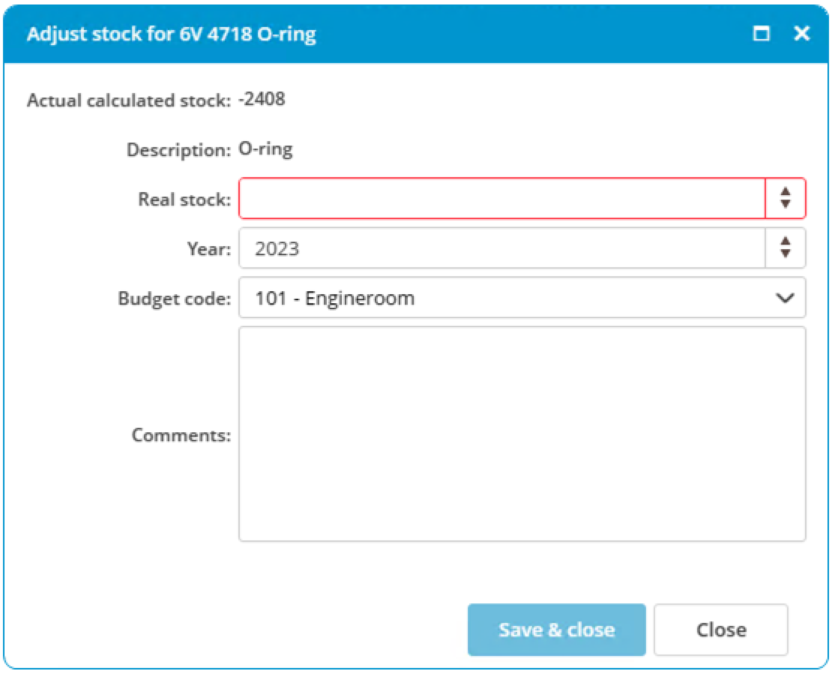
The stock is automatically adjusted when:

- a maintenance task is executed to which parts are linked

- a purchase order is marked as delivered

Follow the steps below to adjust the stock manually:

1. Right-click on an part and select **Adjust stock...**
2. Enter the **Real stock**

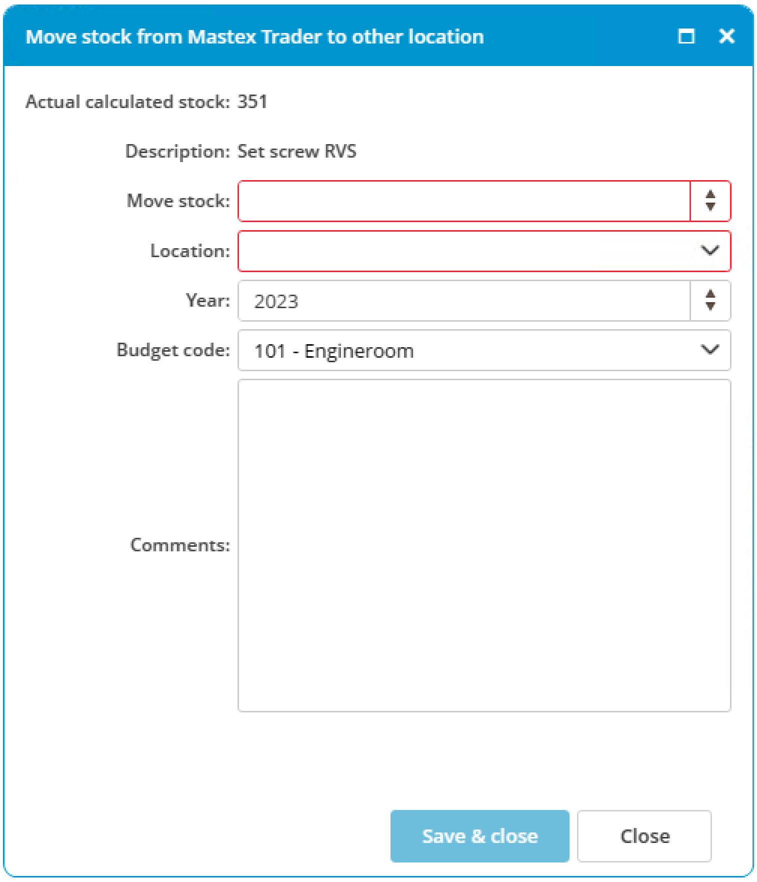


3. Click on **Save & close**

6.7 How do I move stock to another location?

1. Right-click on a part and select **Edit...**
2. Go to the tab **Stock from other locations**
3. Click right of the location name on **Move stock to other location**

4. Complete all required fields



5. Click on **Save & close**

A change will be made based on the selected ledger account. This keeps the budget up to date. This change can be consulted in the history.

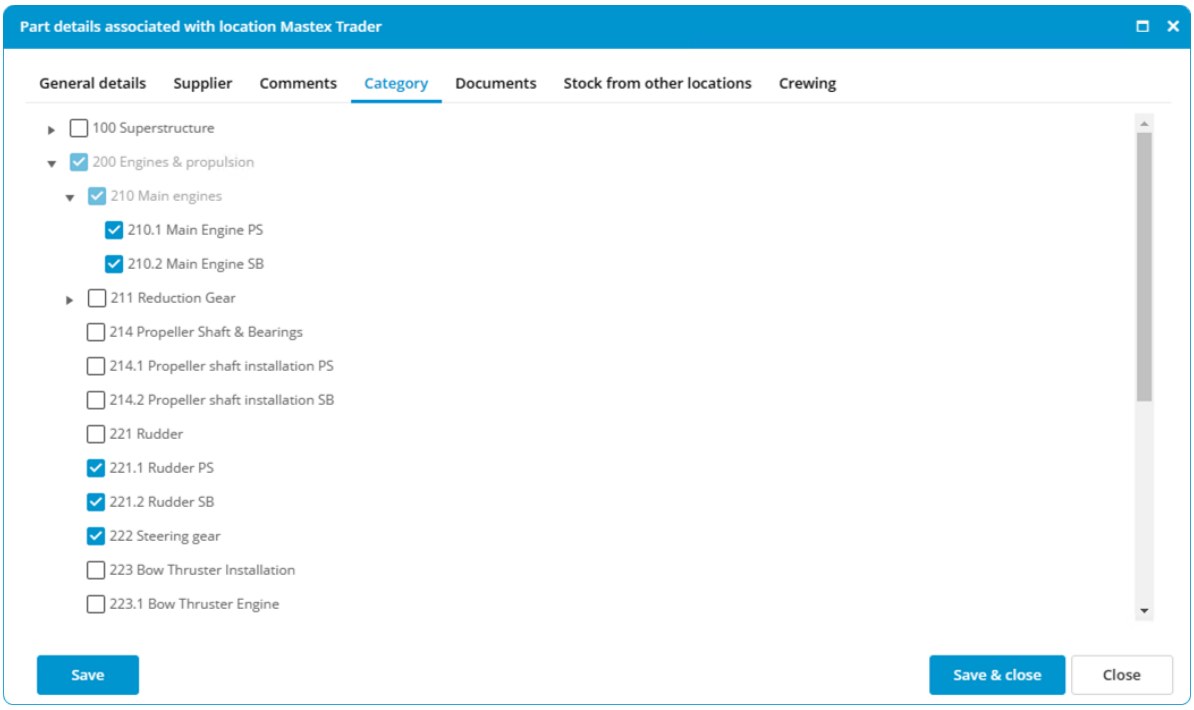
6.8 How do I see the history of a part?

1. Go to the module **History**
2. Select **Assets parts**
3. Click on **Search**
4. Use the **Filters** to add the history of the right part to the overview

Tip:
Right-click on an article and select **Show history**. MXSuite will now open the module History and display the data for the selected part.

6.9 How do I link an article to a category?

1. Right-click on an part and select **Edit...**
2. Go to the tab **Category**
3. Select the category where the article should be displayed
4. Click on **Save & close**

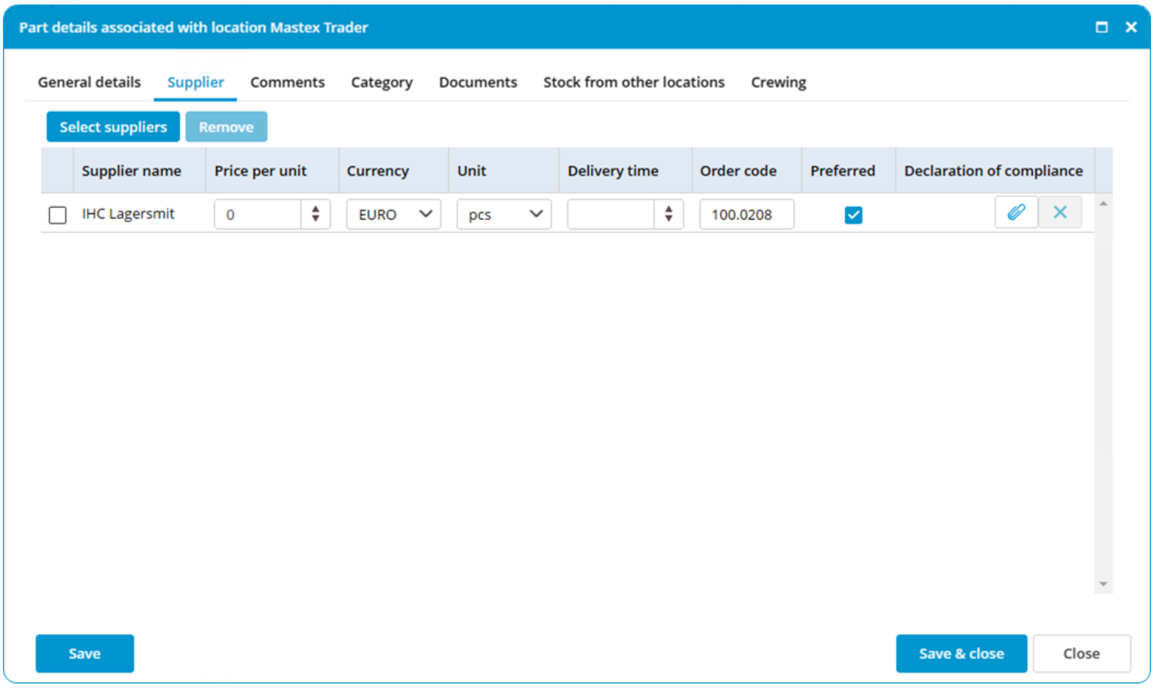


Tip:
If an article is created while a category is selected, the article will be linked to the selected category.

6.10 How do I link a part to a supplier?

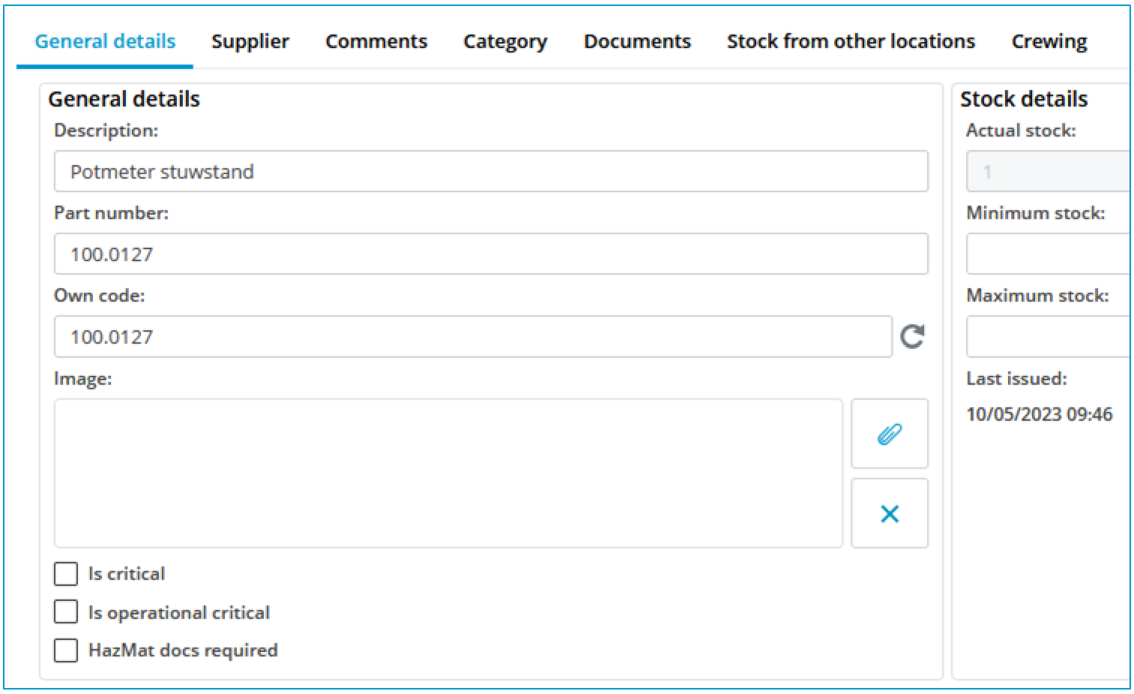
1. Right-click a part and select **Edit...**
2. Navigate to the **Supplier** tab

3. To set a preferred supplier check the box in the **preferred** column



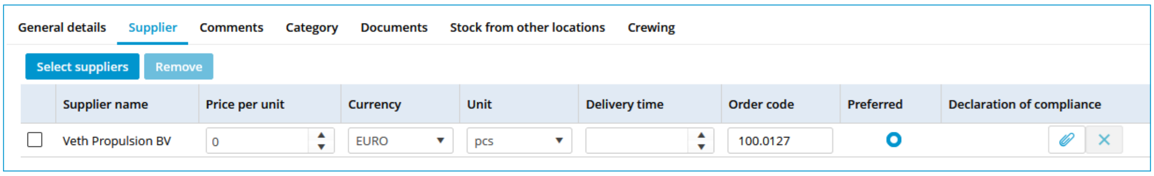
6.11 How do I specify hazardous material documents?

1. Right-click on a part and select **Edit...**
2. Go to the tab **General details**
3. Select the option **HazMat docs required**

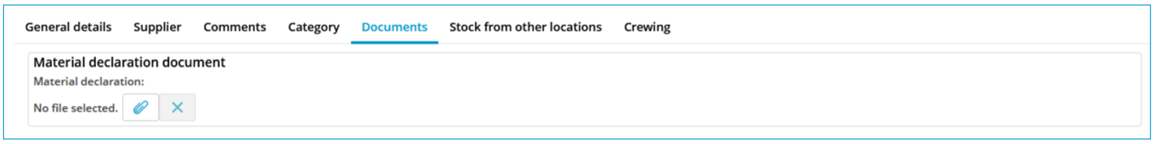


4. Go to the tab **Supplier**

5. Add the Declaration of compliance



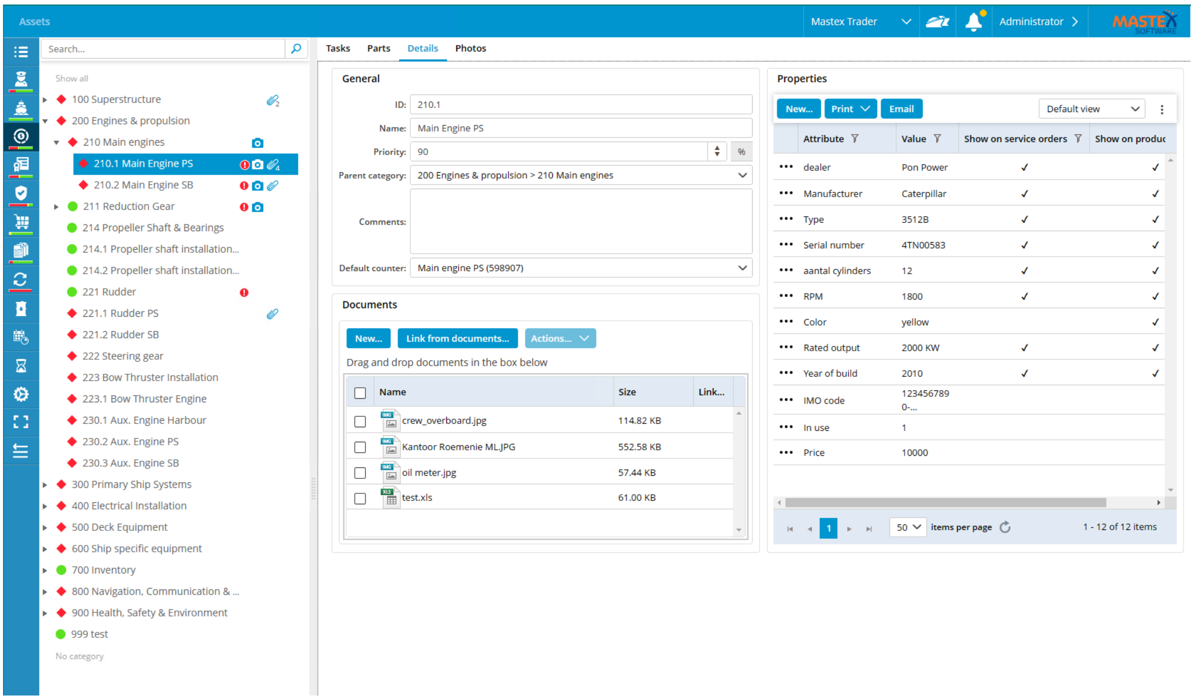
6. Go to the tab **Documents**
7. Add the Material Declaration documents



Tip:

When the option **HazMat doc required** is selected, this will be visible on a printed purchase order for this part.

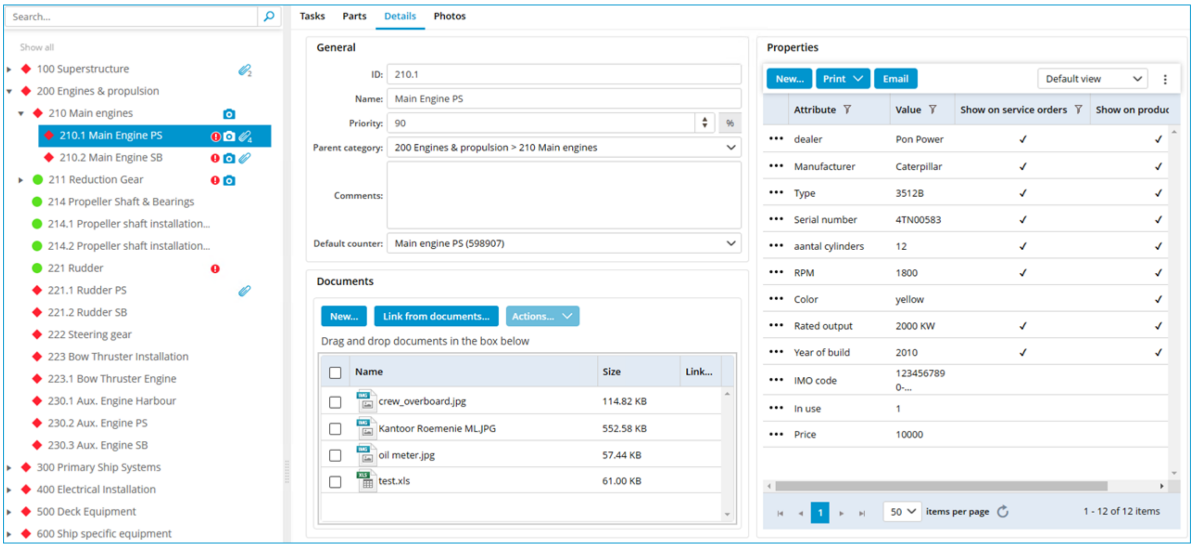
7 Assets details



Assets Details is a part of the Assets module and is used to save all data associated with the installed equipment such as the manufacturer, type, serial number, etc.
The entered data can be used, among other things, to create a purchase order or a service order. You can also add the information from the relevant machine to a purchase- or service order.

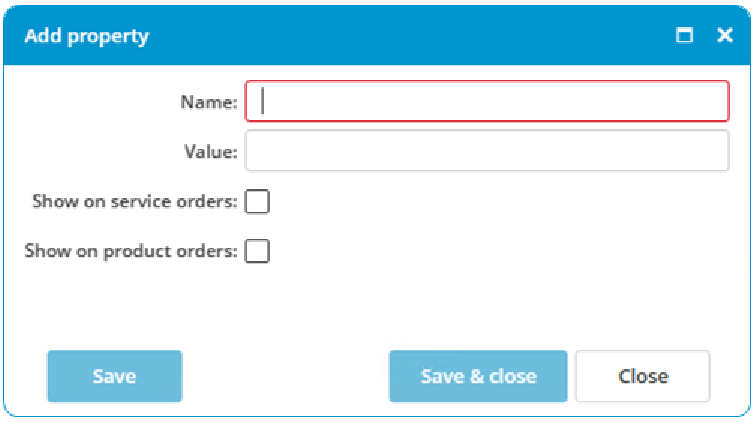
7.1 How do I add a detail to a category?

1. Select the desired category in the tree structure
2. Select **Details**



3. Within the properties area, click **New...**

4. Complete all required fields



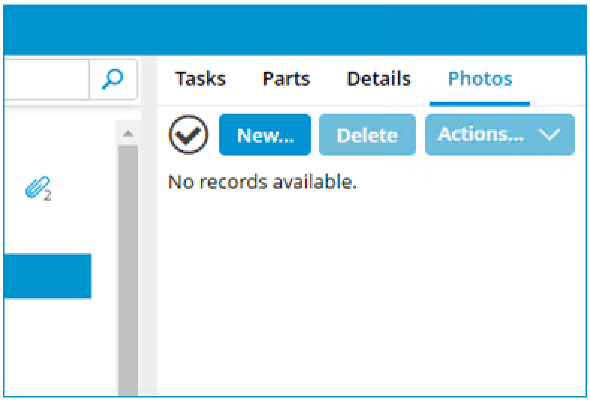
5. Click on **Ok**

Optional:

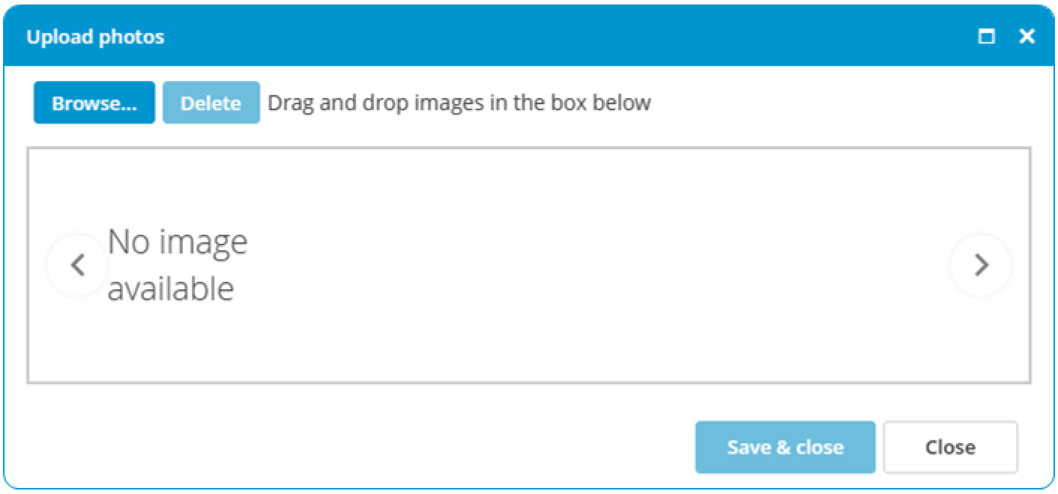
Show on service orders: Select this option to send the detail along with a service order.
Show on product orders: Select this option to send the detail along with a product order.

7.2 How do I add a photo to a category?

1. Right-click on a category and select **Edit category...**
2. Click on **Photos** > **New...**



3. Click on **Browse...**

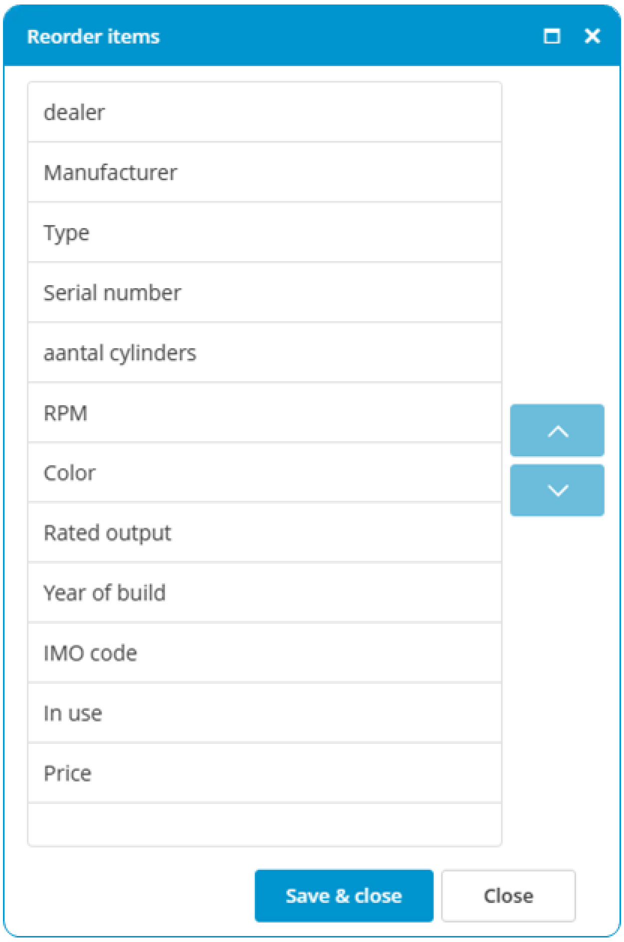


4. Select the images
5. Click on **Save & close**

> **Note:**
> Permitted image formats are: .BMP .DIB .RLE .JPG .JPEG .JPE .JFIF .GIF .TIF .TIFF .PNG

7.3 How do I reorder the details?

1. Right-click on a detail and select **Reorder attributes...**
2. Select a detail and use **Move up** and **Move down** to change the order

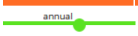
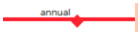


3. Click on **Ok**

8 Certificates

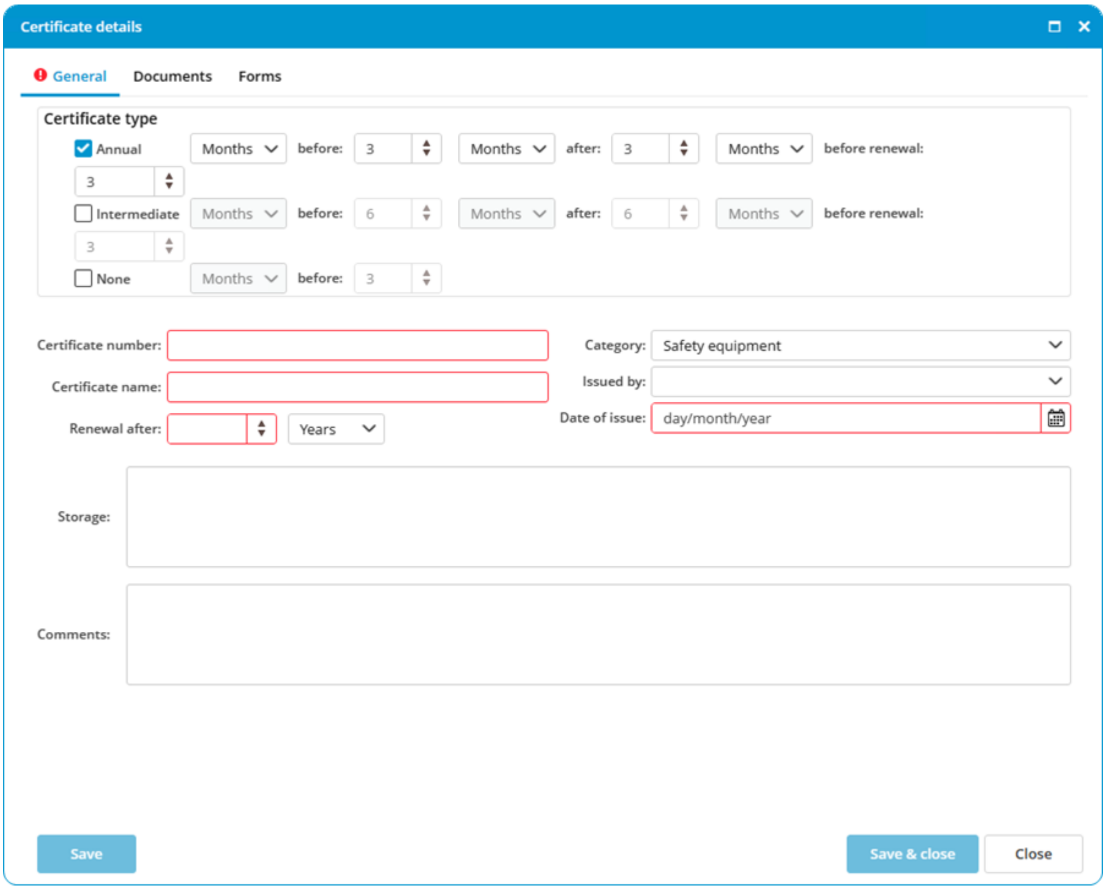
The expiration date of certificates can be monitored and managed in the module Certificates. Certificates are subdivided into groups. Groups can be selected within the sidebar on the left.

8.1 What do the symbols mean?

Symbol	Explanation
	The green ball indicates that a survey or certificate needs to be updated in this period. At the moment, no additional actions are required.
	The green ball with the curl indicates that this survey has been performed. This survey has been included in the history tab.
	The orange triangle indicates that the survey or certificate renewal is currently in the window period and therefore needs your attention.
	The red diamond indicates that a survey or certificate needs to be renewed and actually is overdue.
	The line to the left of a symbol indicates the window period before the survey or certificate renewal. The length of the line indicates the number of months in this period.
EXPIRED !!	This certificate has expired and the due date is not in the current view.

8.2 How do I create a new certificate?

1. Click on **New**
2. Select the **Certificate type**



- **Annual**: A survey will be planned annually for this certificate
- **Intermediate**: A survey will be planned for some time between the date of issue and the date of expiry
- **None**: Use this type when no intermediate surveys are required
- **Docking**: This type is used to plan dockings, after which the tasks can be created in the module Maintenance that are related to a docking (only shown when no docking is created)

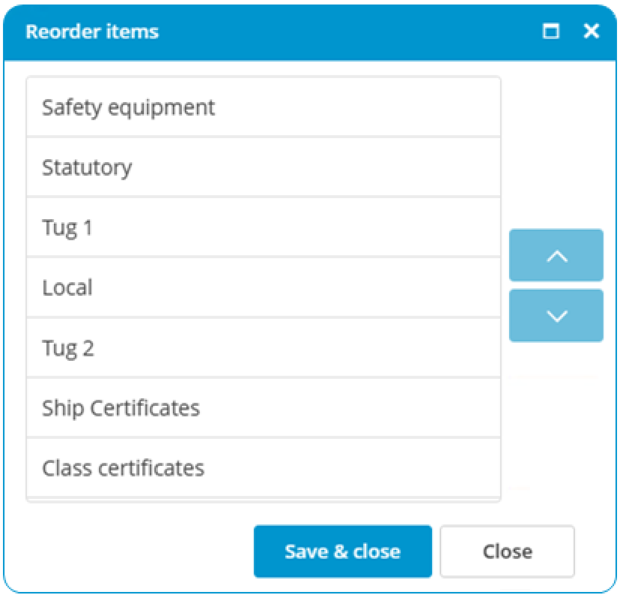
3. Complete all required fields
4. Click on **Save & close**

Tip:

If a certificate is entered with an issue date but without an expiry date, enter a 0 in **Renewal after**. This will remove the expiry date from the screen.

8.3 How do I reorder categories?

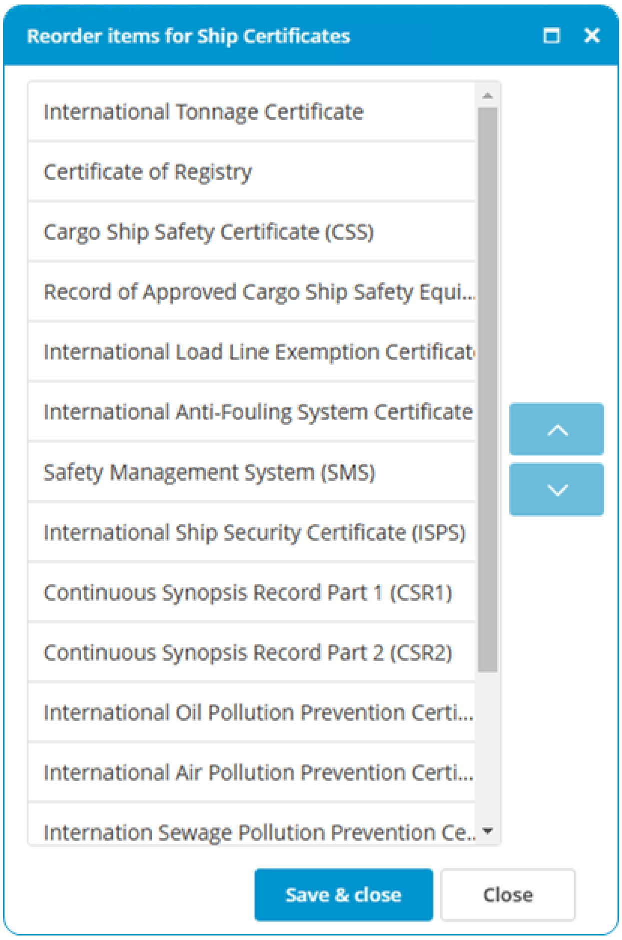
1. Right-click on a **Category** and select **Reorder certificate categories...**
2. Select a category and use **Move up** and **Move down** to change the order



3. Click on **Save & close**

8.4 How do I reorder certificates?

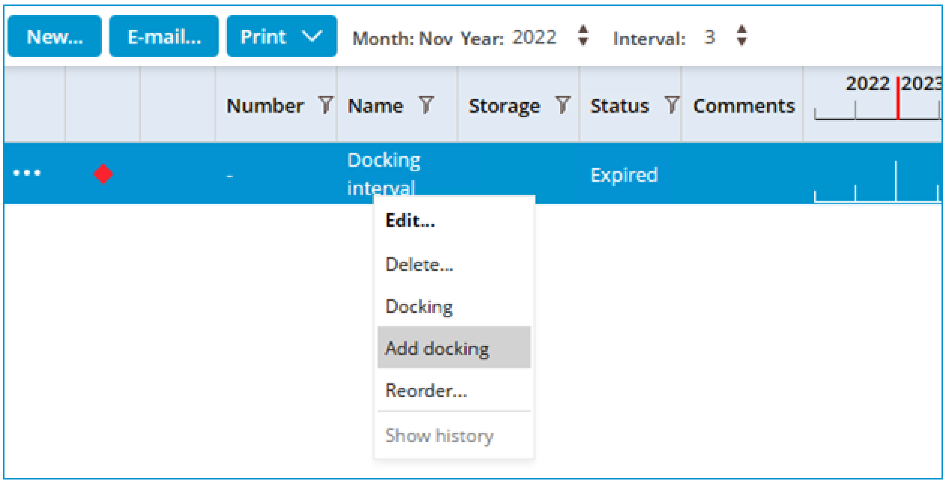
1. Right-click on a **Certificate** and select the option **Reorder certificate items...**
2. Select a certificate and use **Move up** and **Move down** to change the order



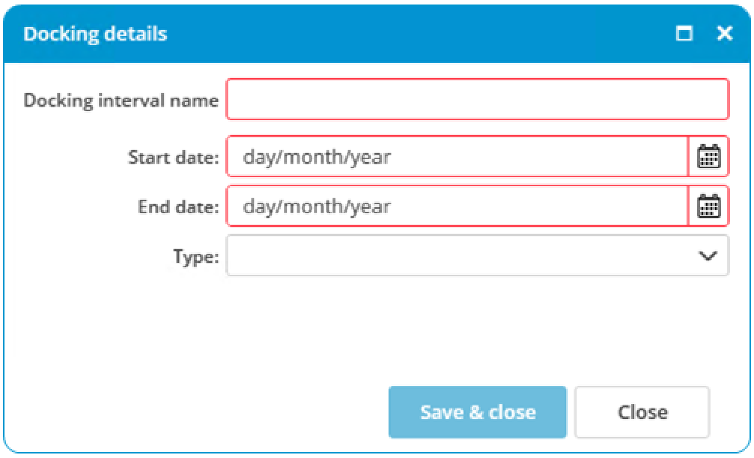
3. Click on **Save & close**

8.5 How do I add an extra docking?

1. Right-click on the docking certificate and select **Add docking**



2. Enter the **Start date** and **End date**



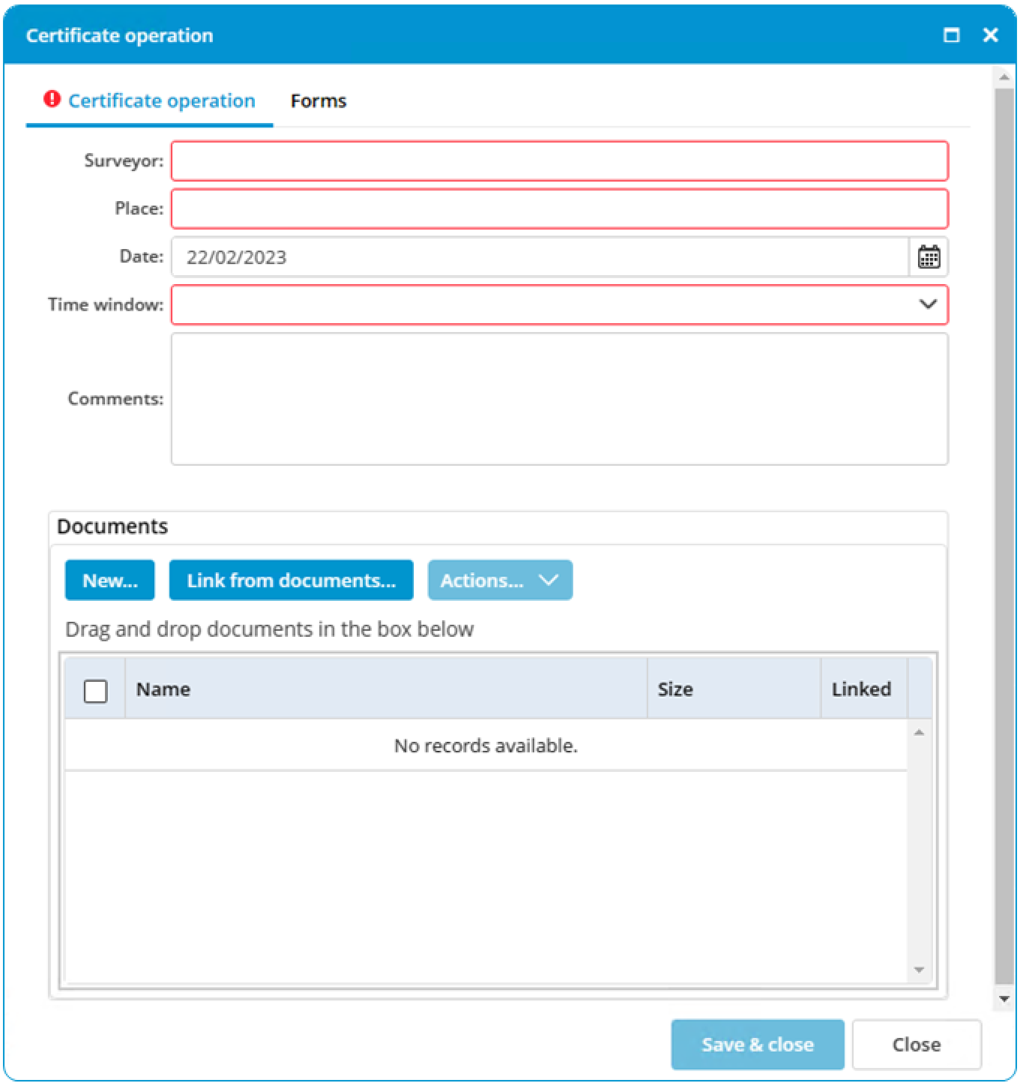
3. You can also select **Intermediate** or **Special** under Type
4. Click on **Save & close**

> **Tip:**
> You can link a docking task to an intermediate survey or a special survey.

8.6 How do I mark a survey as done?

1. In the timeline of the certificate you want to extend, double-click on the symbol (this is only possible if the colour is orange or red) or right-click on the symbol and select **Endorsement...**

2. Complete all required fields



3. Select the annual or intermediate survey that has been completed
4. Click on **Save & close**

Note:

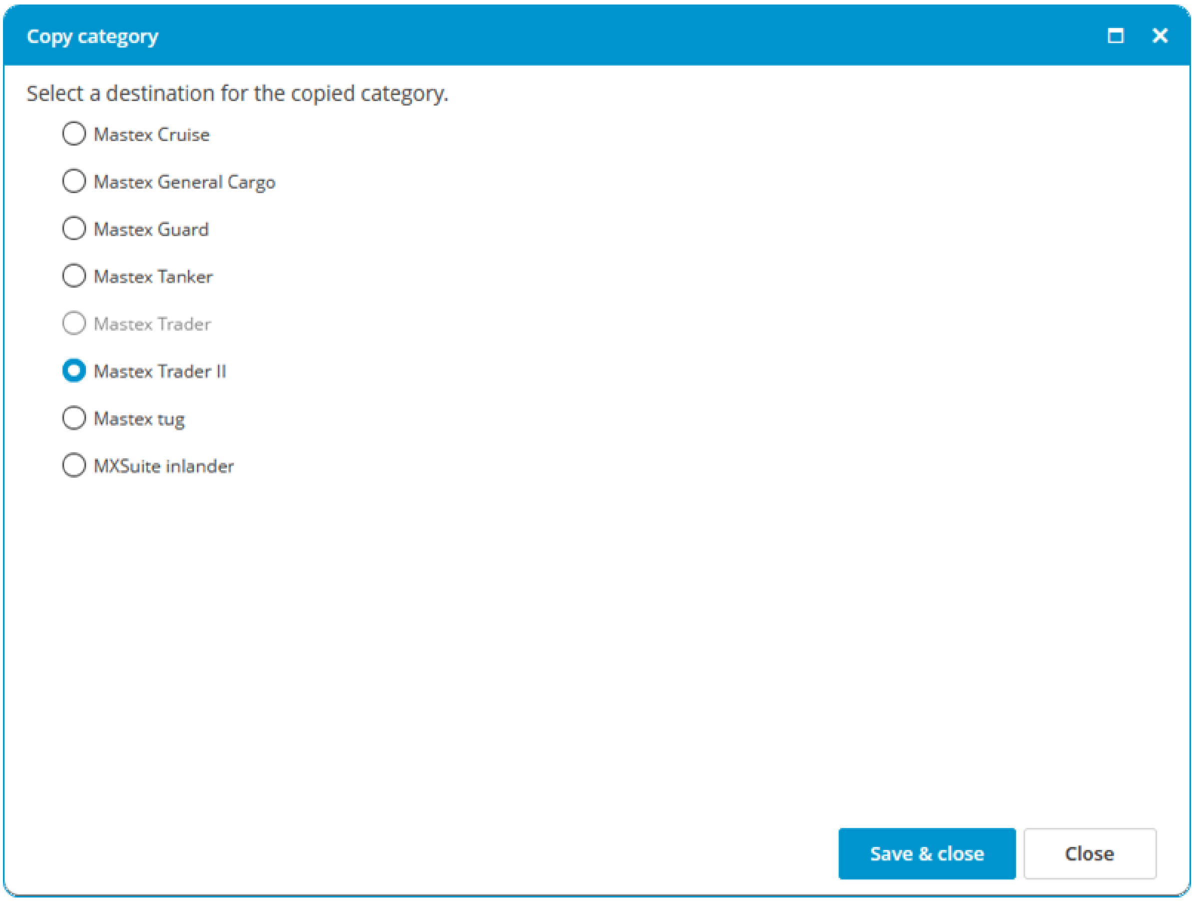
After extending the certificate, a green ball with a curl will appear.

Tip:

When carrying out a survey, select the option **Extra survey** to save an interim survey in the certificate history.

8.7 How do I copy all certificates in a category?

1. Right-click a certificate category and click **Copy...**
2. Select the location where you want to copy the certificate category to.



3. Click **Save & Close**

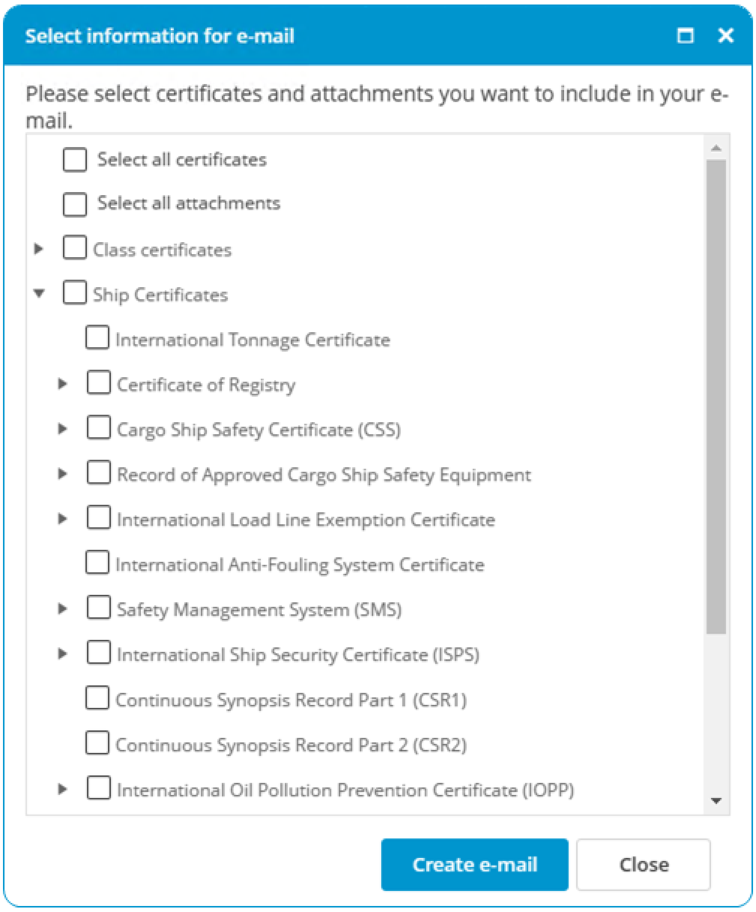
Note:
The history of the certificates will also be copied.

A location is not displayed during the copying process if:

- the destination has no module Certificates
- the source has a docking certificate and the destination does not

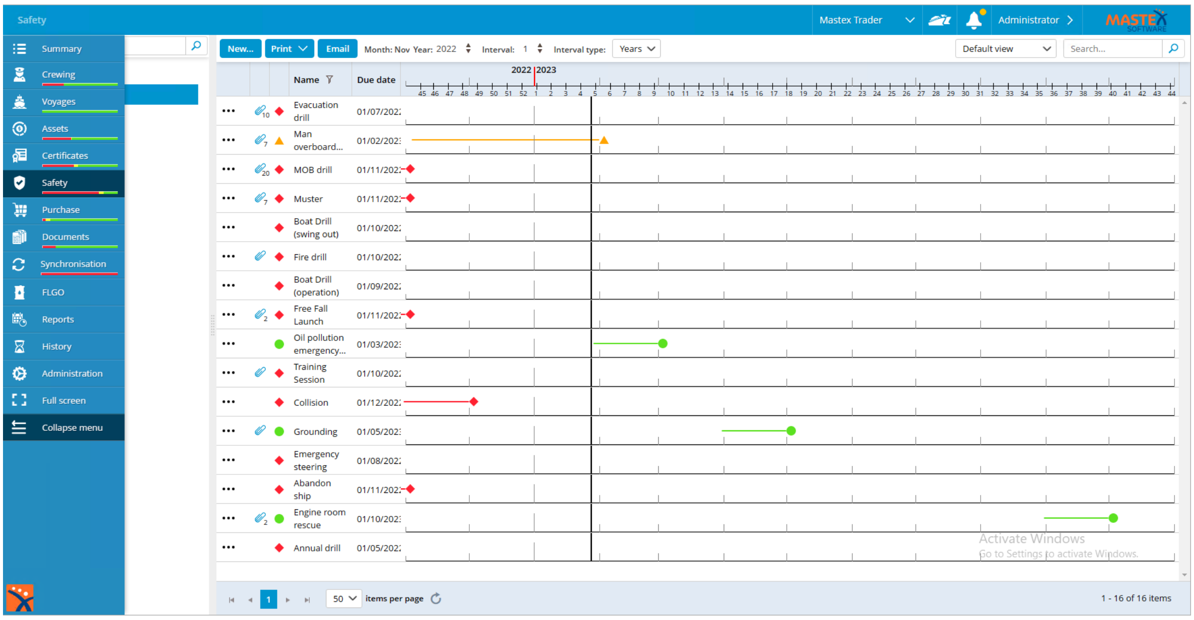
8.8 How do I email certificates?

1. Click on **Email...**
2. Select the email you want to send. You can select all certificates and all attachments at the same time or you can add them separately



3. Click on **Create e-mail**
4. The generated email will be downloaded or shown in MXSuite (depends on configuration)

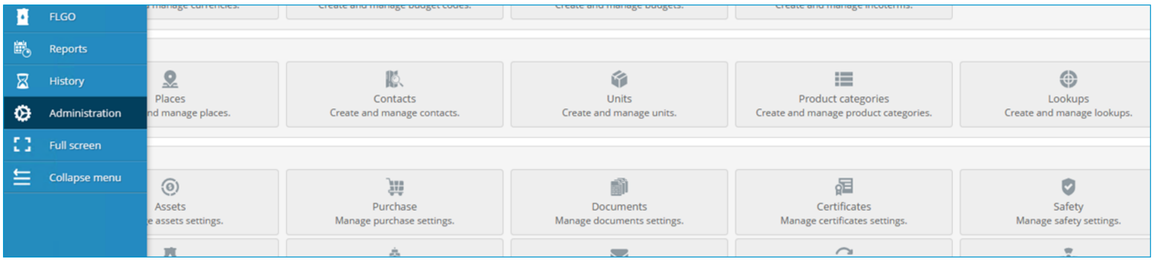
9 Safety



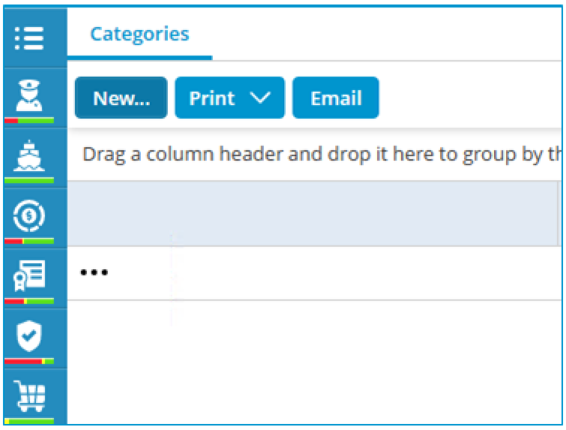
In the module Safety you can view and plan the safety drills.

9.1 How do I create a new category?

1. Select the module **Administration** and choose **Safety**



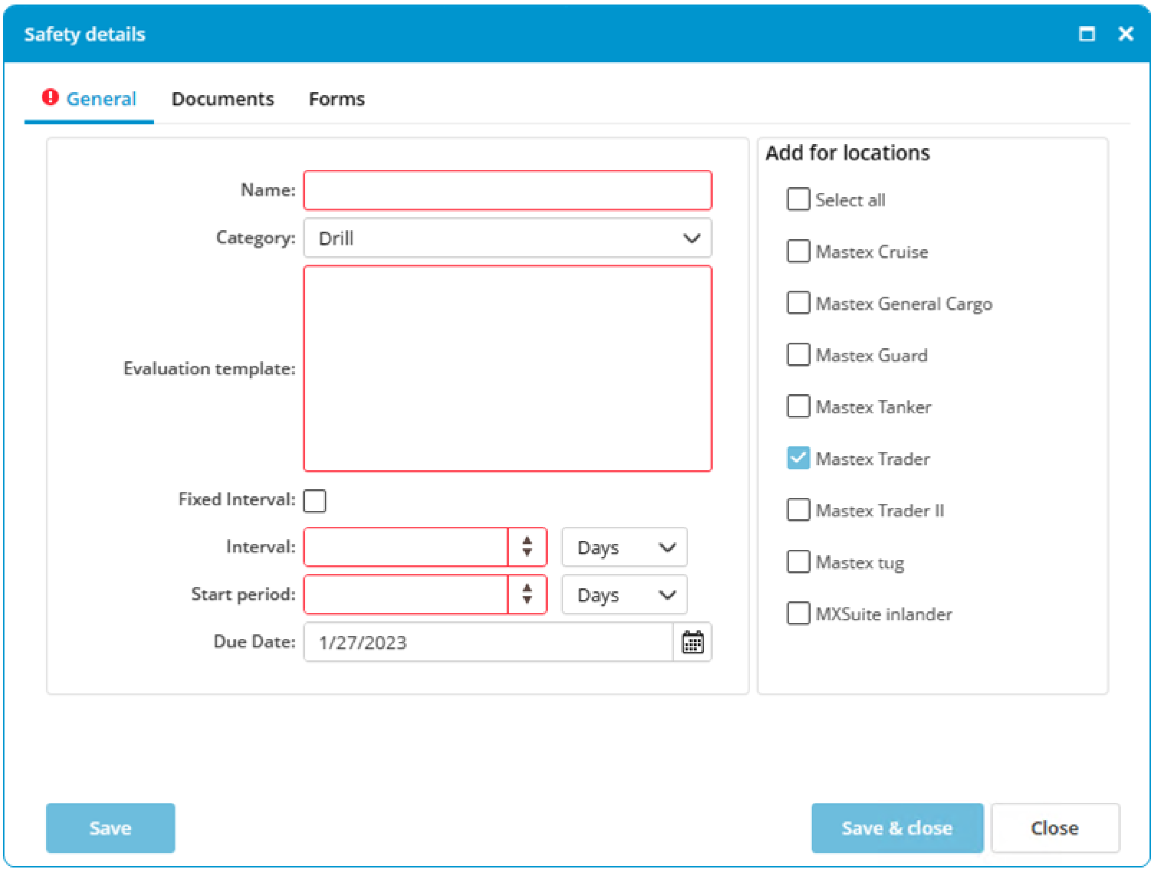
2. Click **New...** to add a new category



3. Fill in the fields and click on **Save & close**

9.2 How do I add a new drill?

1. Click on **New...**
2. Complete all required fields

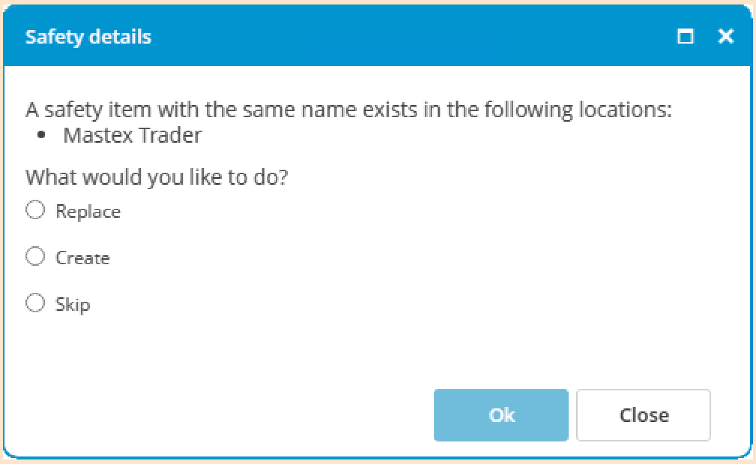


The **Start period** is the timeframe in which the drill must be completed. During this period the drill will be orange

3. Select the **locations** to which the safety drills must be added (only visible in the office version)
4. Click on **Save & close**

Note:

If the new drill already exists at the other location, the following warning will appear:



Make a selection and click **Ok**.

9.3 What does the fixed interval option do?

The fixed interval option can be selected when you create a:

- maintenance task
- safety drill

The following table clarifies what this option does.

A task or a drill has an interval of one month.

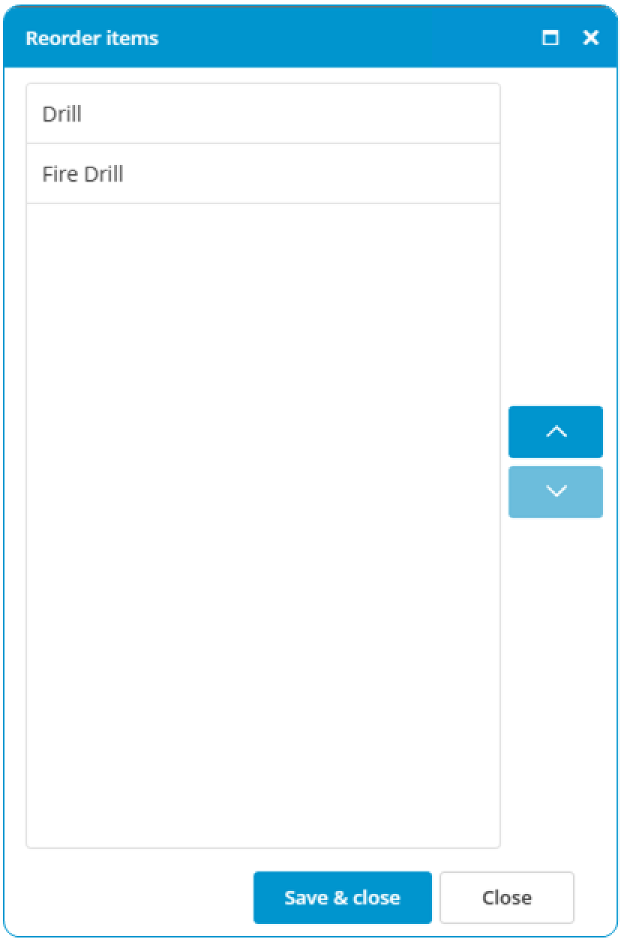
	No fixed interval	Fixed interval
Expiration date	1 January	1 January
Date of first execution	3 January	3 January
Next expiration date	3 February	1 February
Date of second execution	6 February	6 February
Next expiration date	6 March	1 March

With a fixed interval, the next expiration date is always calculated from the first expiration date.

9.4 How do I reorder categories?

1. Navigate to **Safety** within the **Administration** module

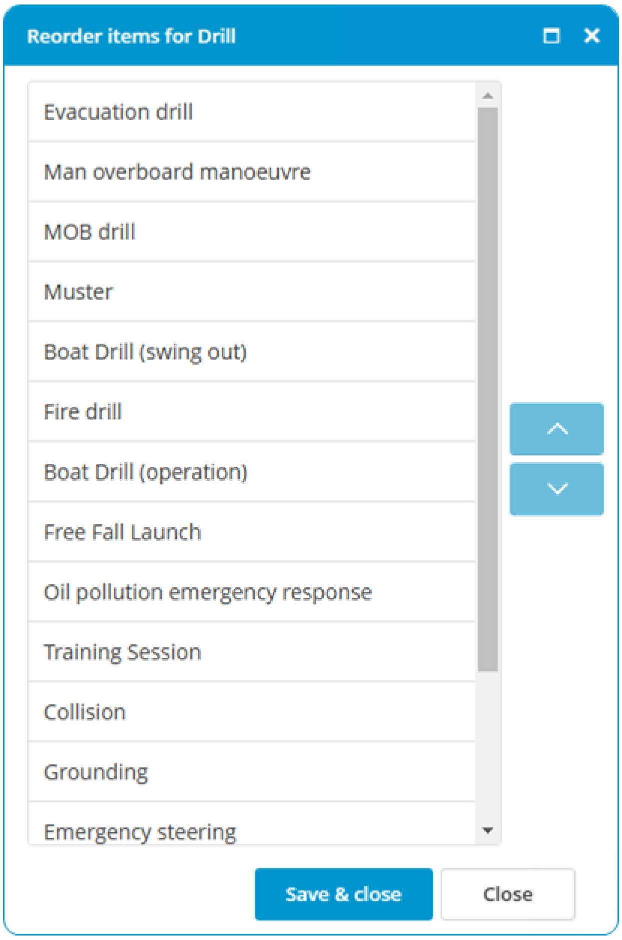
2. Right-click on a **category** and select **Reorder...**



3. Select a category and use **Move up** and **Move down** to change the order
4. Click on **Save & close**

9.5 How do I change the ordering of the drills?

1. Right-click on a safety drill and select **Reorder safety items...**

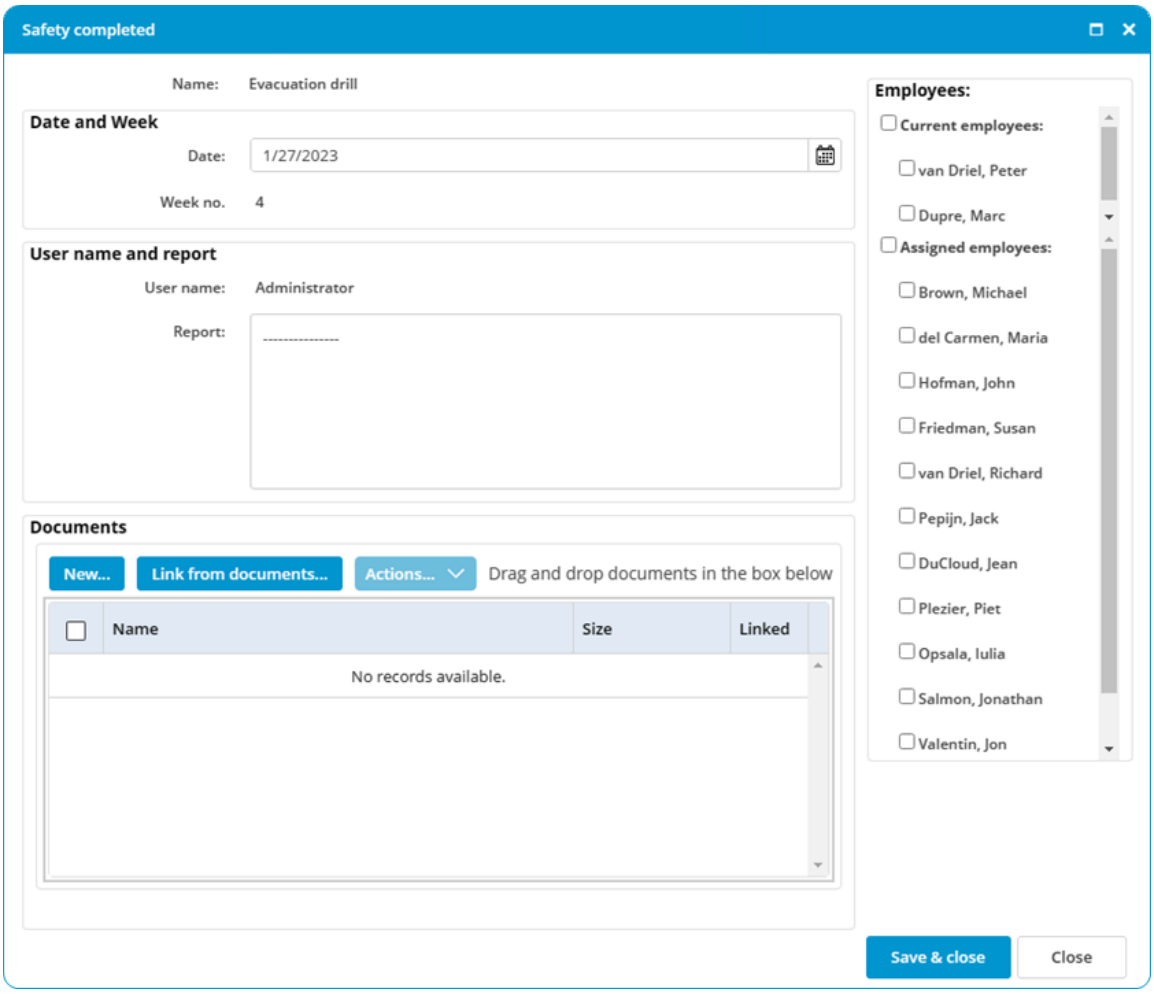


2. Select a safety drill and use **Up** and **Down** to change the ordering
3. Click on **Save & close**

9.6 How do I mark a drill as done?

1. Double-click the time bar of the completed drill or right-click on the drill and select **Completed...**

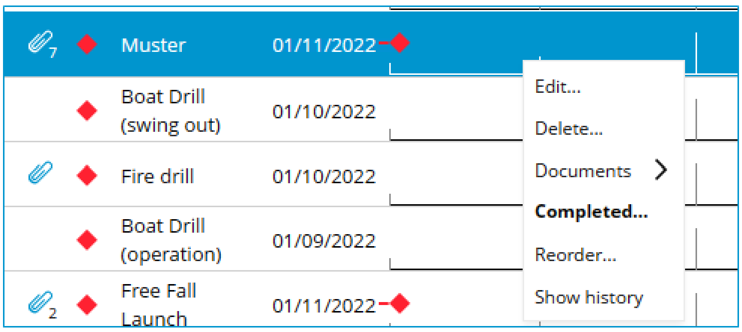
2. Enter the drill data



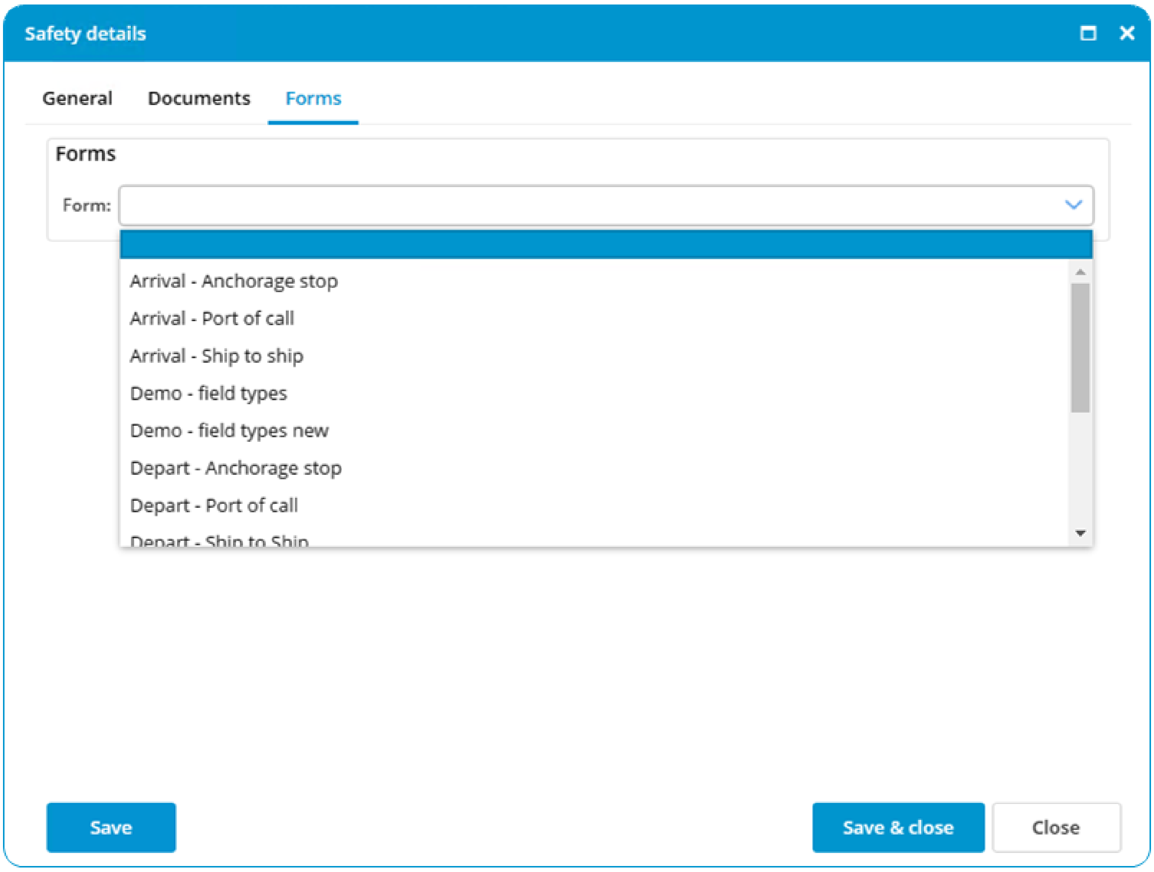
3. Select the employees that participated in the drill (only possible if the module Crewing is included in the license)
4. Click on **Save & close**

9.7 How do I link a form to a drill?

1. Select **Edit...** for the desired drill

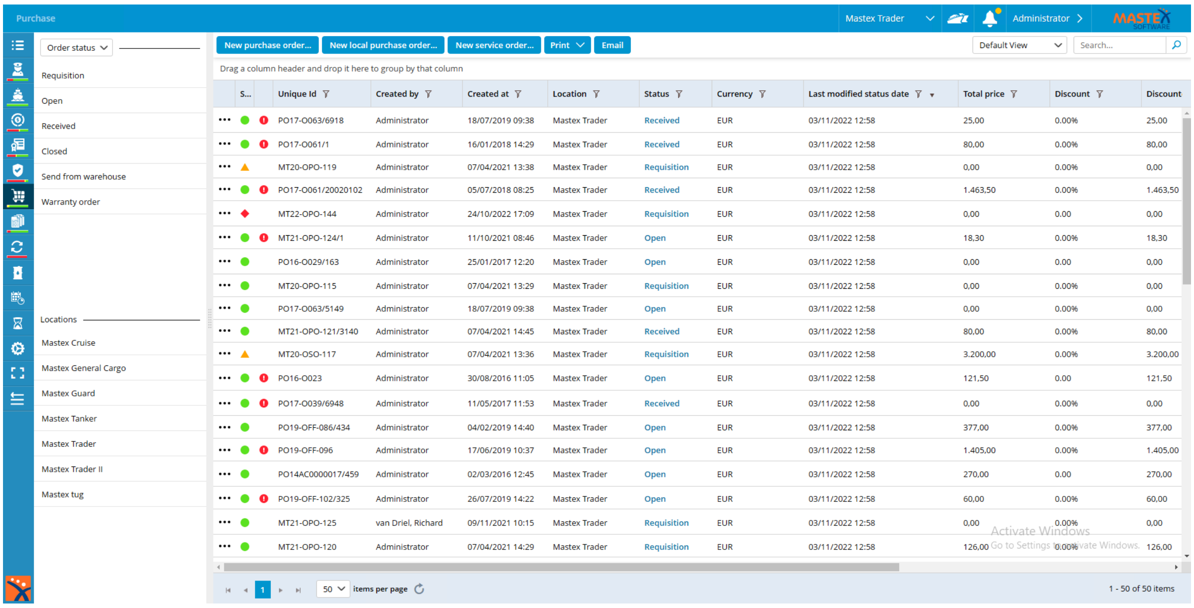


2. Within the **Forms** tab selected the desired forms



3. Click on **Save & close**

10 Purchase



The module Purchase allows you to process all purchases by and for ships in a central location and provides you with a clear overview of outstanding purchase orders.

> **Note:**
> The module Purchase can be configured to meet the user's requirements. This chapter uses the default settings. Texts or images may therefore differ from your situation.

10.1 What is the difference between the types of orders?

Different orders can be created in the module Purchase.

A **purchase order** allows you to order products from stock. Free order lines are used if the product is not available from module Inventory.

A **local purchase order** is the same as a product order, with the exception that a different purchase process can be configured. A local purchase order offers the crew the opportunity to purchase local products and register them in MXSuite.

A **service order** allows you to request a service. In this case, it is not possible to add products from stock.

You can configure the process for all orders, but product orders may differ from service orders.

10.2 How do I create a purchase order?

1. Click on **New purchase order...**
2. Enter a search term in the column **own code** and click on 🔎 to open the list of parts

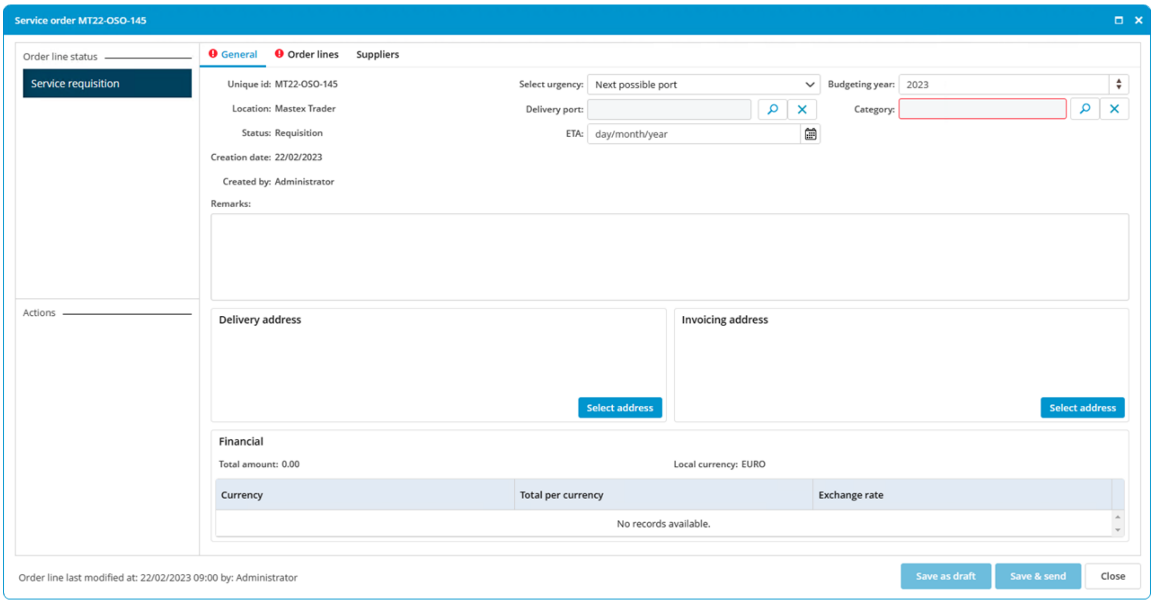
3. Select one or more parts and click on **Ok**
4. The selected parts will be added to the order
5. Order lines can be automatically added to an order by clicking on **Insert required inventory**. This will add all parts to the order whose stock is lower than the minimum requirement and for which no previous order has been placed
6. Enter the desired amount for all order lines
7. Click on **Save & send** to save the order and to forward it for further processing. Click on **Save as draft** to edit the order or to send it at a later date

10.3 How do I create a local purchase order?

1. Click on **New local purchase order...**
2. Enter a search term in the column **own code** and click on to open the list of parts
3. Select one or more parts and click on **Ok**
4. The selected parts will be added to the order
5. Enter the desired amount for all order lines
6. Click on **Save & send** to save the order and to forward it for further processing. Click on **Save as draft** to edit the order or to send it at a later date

10.4 How do I create a service order?

1. Click on **New service order...**
2. At the top right of the window, select the machine that needs servicing

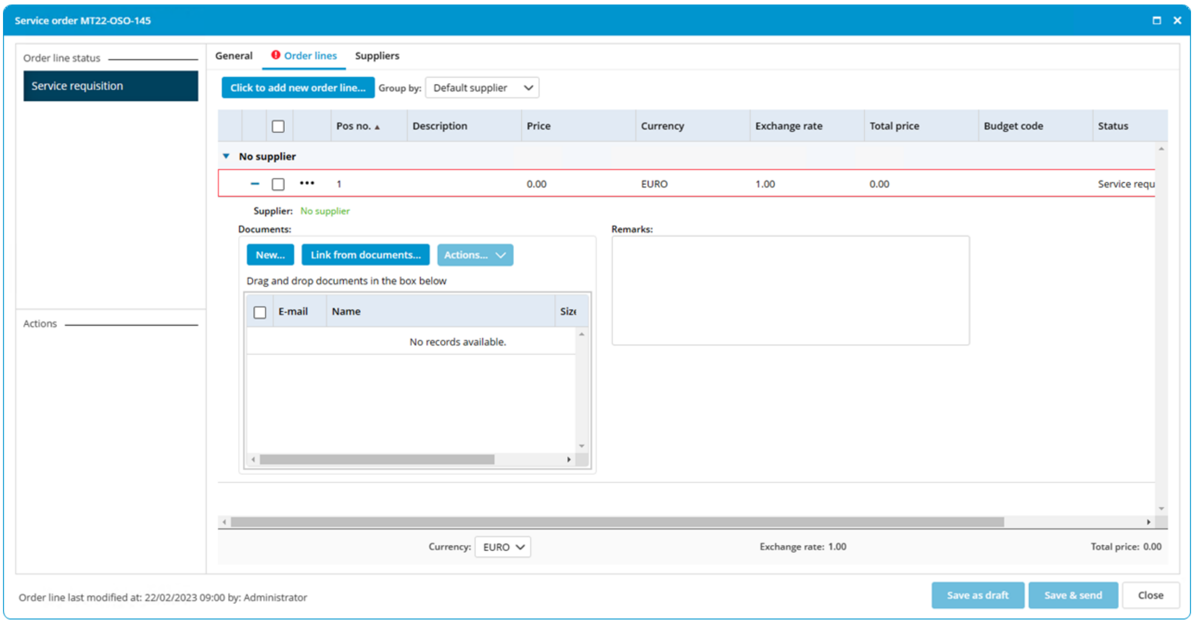


3. Clearly indicate the necessary service in the order line
4. Click on **Save & send** to save the order and to forward it for further processing. Click on **Save as draft** to edit the order or to send it at a later date

10.5 How do I add documents to an order line?

You can add documents per order line.

1. Click on + in front of the order line
2. Click on **New** to add a new document or click on **Link from documents...** to link a document within MXSuite.



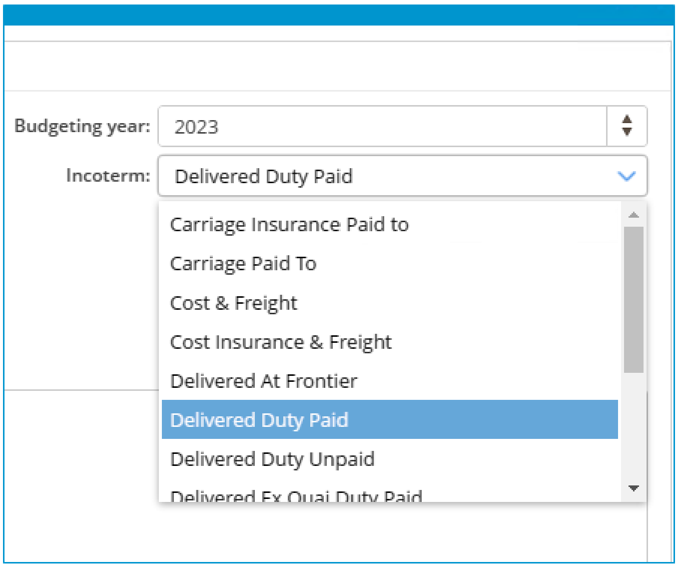
Tip:

If the option **Email** is selected, the document will be included when the order will be emailed to the supplier.

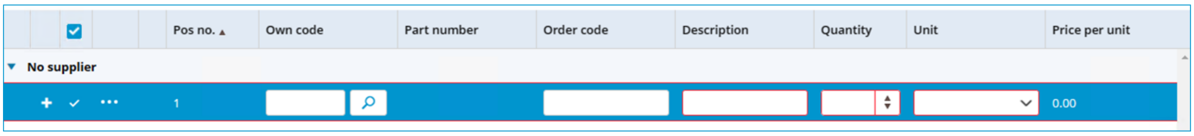
10.6 How do I use Incoterms in my order?

The international Incoterms are used to determine the rights and duties of buyers and sellers during the international transport of goods.

The Incoterm of relevance to the order can be selected or changed at the top right of the order screen.



When an Incoterm is selected for which the transport costs are borne by the customer, MXSuite adds an extra order line to the order on which the order costs are mentioned.

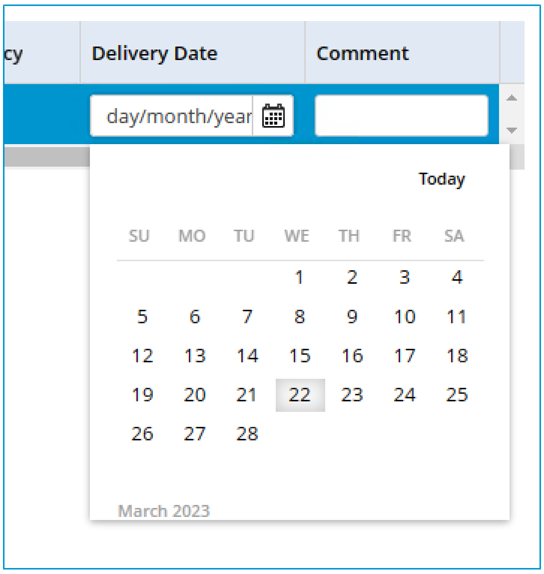


Tip:
Using Incoterm **Ex Works**, a line with transport costs is added to the order.

10.7 How do I add the expected delivery date to an order line?

1. Open a purchase order
2. Open the **Suppliers** tab
3. Scroll to the right and click the cell **Delivery Date** for the required part.

4. Select a date

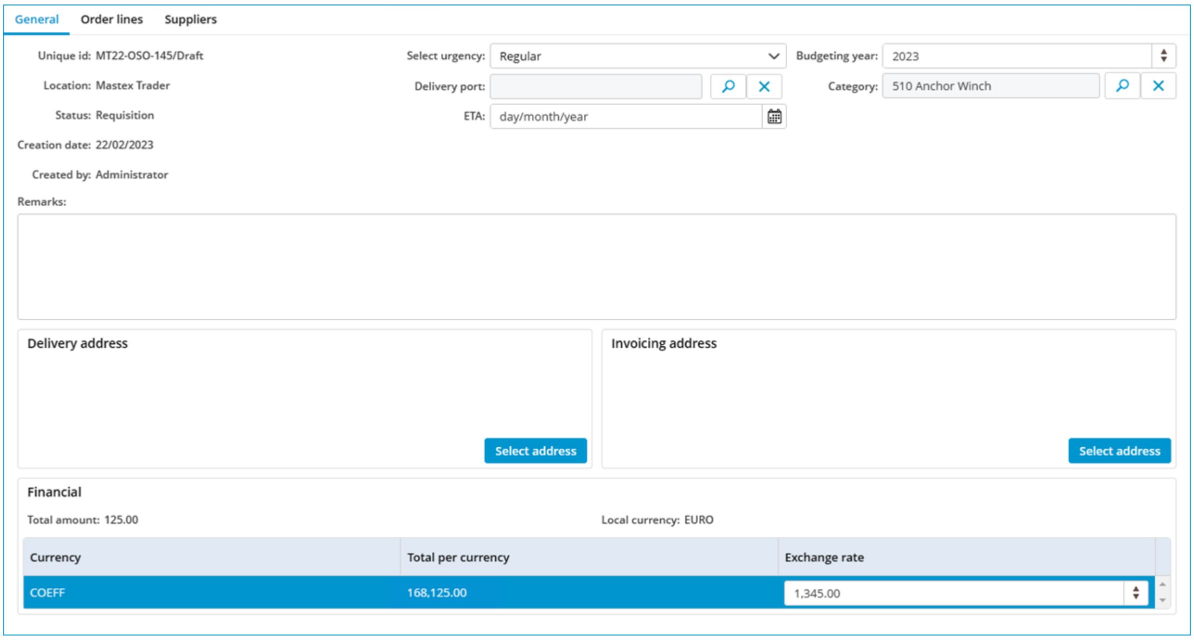


5. Click **Save & close**

> **Tip:**
> You can select multiple order lines using Ctrl or Shift.

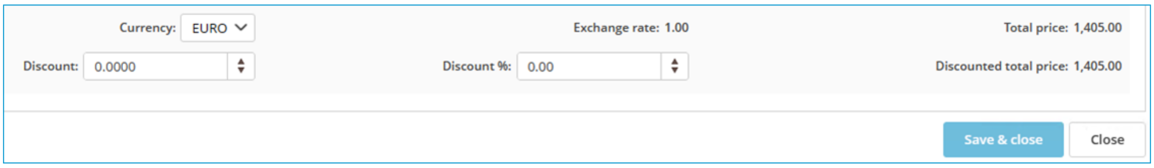
10.8 How do I change the exchange rate in an order?

1. Open a purchase order
2. Select the desired order line and click on 
3. Click on **Select currency...**
4. Select the desired currency.
5. Open the tab **General**.
6. You can now change the exchange rate for this order. The exchange rate as configured in MXSuite module Administration is used by default
7. Click on **Save as draft**.



10.9 How do I enter the discount for an order?

1. Open an order
2. Enter the percentage or the discount price



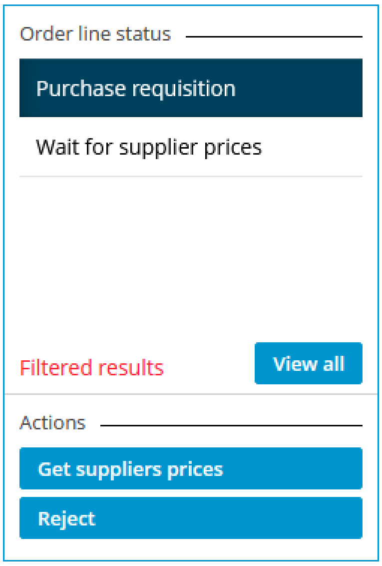
3. Click on **Save & close**

Note:
Only one value is necessary. If a discount percentage is entered, the discount price will be calculated. If a discount price is entered, the discount percentage will be calculated.

10.10 How do I change the status of multiple order lines?

1. Open a purchase order
2. Select the order lines to be moved to another status

3. Right-click on one of the selected order lines and select the desired status



It is possible to convert all order lines with the same status to the next status by using the action buttons to the left of the screen.

In the image, all order lines are first filtered by the status Purchase requisition, after which three action buttons will appear:

- Request prices
- Order
- Reject

Click on one of these buttons to move all orders to the selected status.

10.11 How can I check the status of my order?

There are two types of statuses in MXSuite:

- Order status
- Order line status

An order status can contain multiple order line statuses. For example, an order with the status 'Open' may contain the following order line statuses:

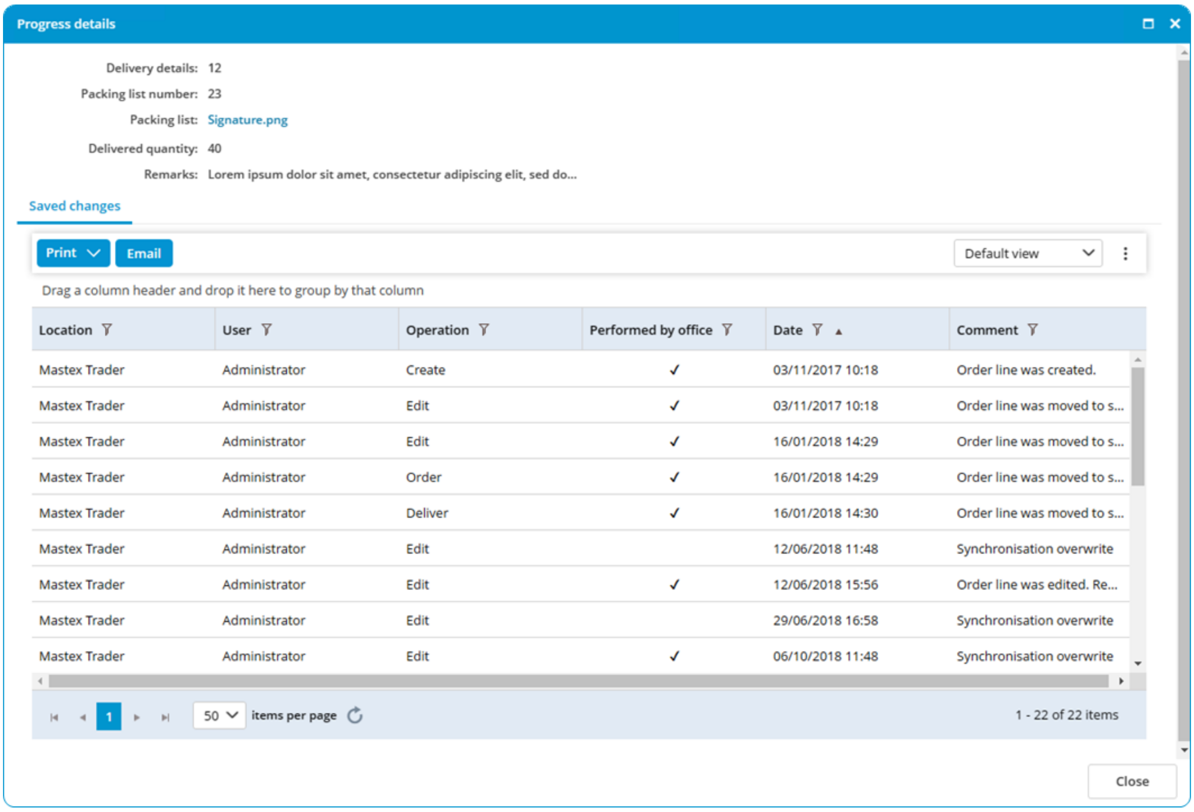
- Pending supplier prices
- Pending approval
- Approved
- Ordered

The status bars are visible to the left. You can select an order status and an order line status at the top of the screen.
Filtering on order status will only display the orders in the selected status to the right of the screen.
Filtering on order line status will display all orders with at least one order line.

Note:
When filtering by order line status, the order will be opened in the order status. Other order line status filters can be applied within the order.

10.12 How can I see the progress of an order line?

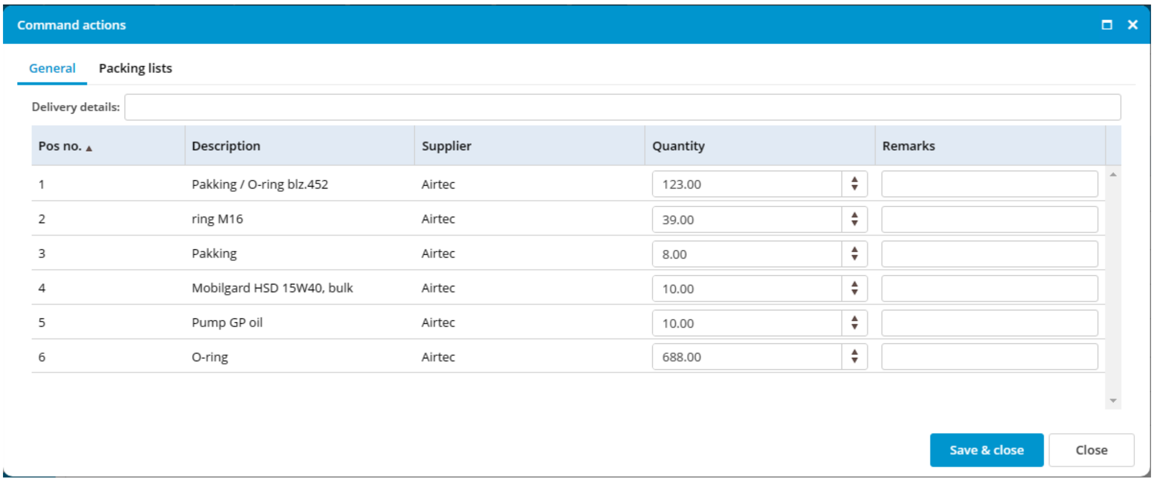
Right-click on an order line and select **View progress details...**



10.13 How do I create a backorder?

When an order has not been delivered in full, a backorder can be created for the non-delivered parts.

1. Mark an order line as **Delivered** (status name depends on the configuration)
2. Enter the number of delivered parts and any additional delivery comments

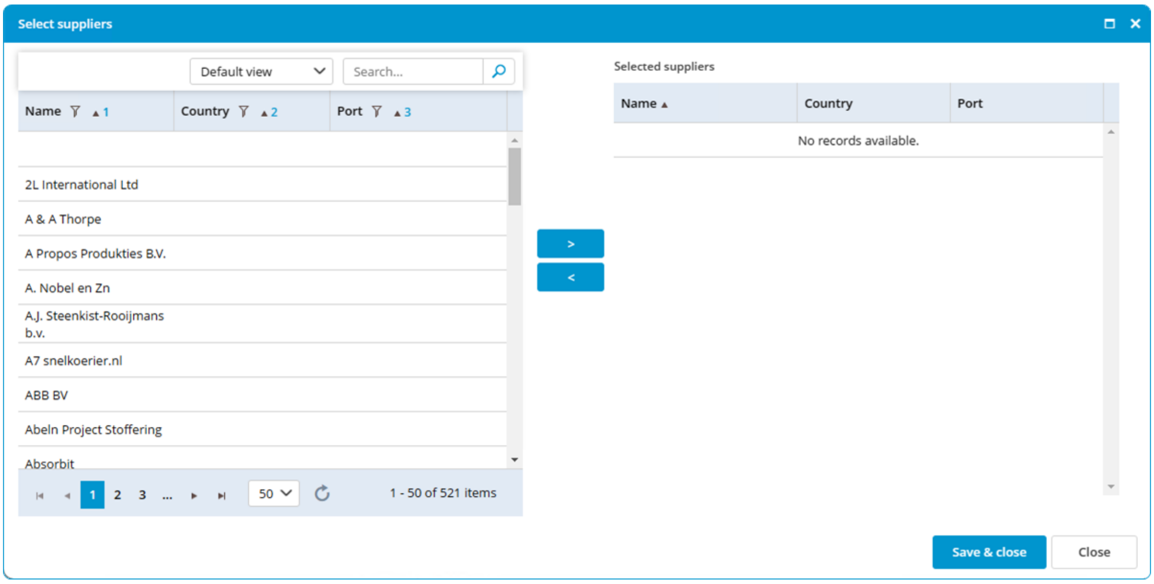


3. Click on **Ok**
4. Click on **Make backorder**
5. A new order line will be created in the existing order with the number of non-delivered parts

Tip:
In addition to creating a backorder, you can also skip the difference. This option allows you to move the order to the next status without creating a backorder.

10.14 How do I link a supplier to an order line?

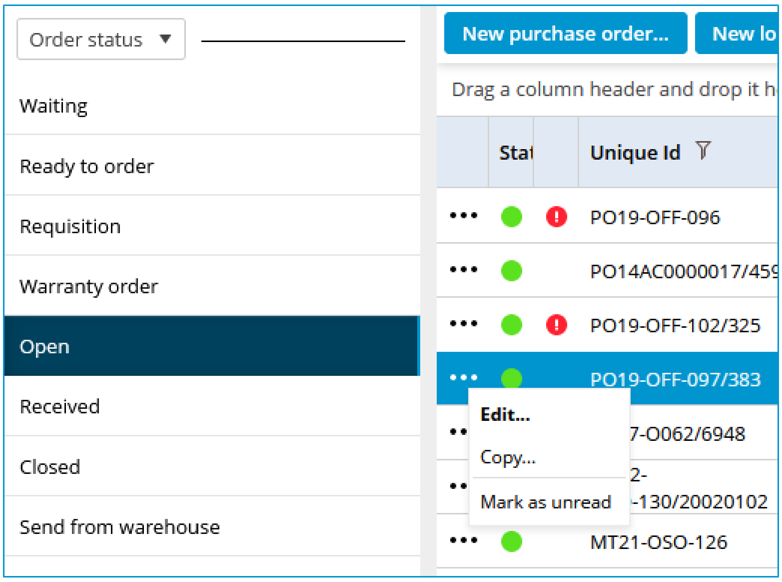
1. Open a product order
2. Select the order lines you want to link to a supplier
3. Right-click on a selected order line and select **Select supplier...**
4. Select the suppliers used for the order line by using the buttons < and >



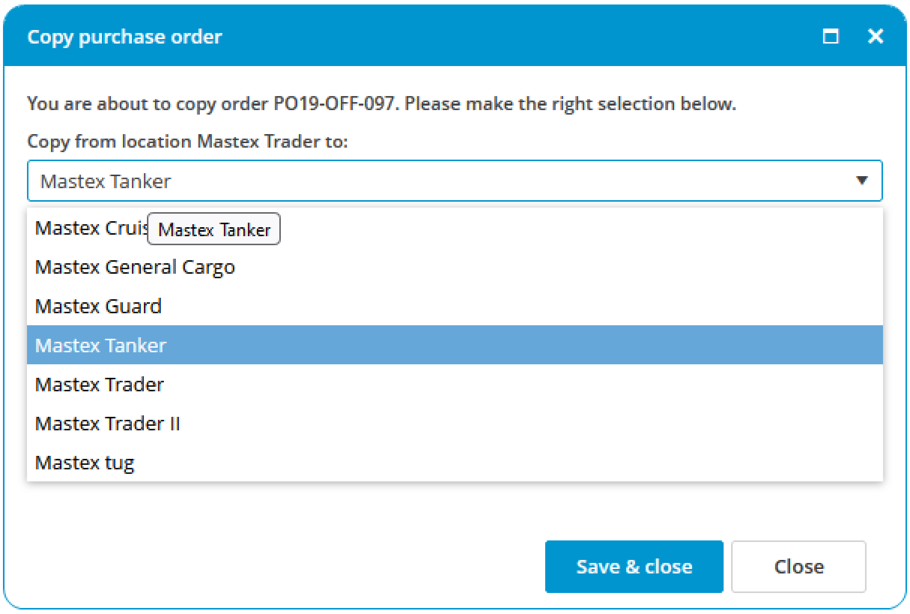
5. Click on **Save & close**

10.15 How do I copy an order?

1. Right-click on the order you want to copy



2. Select **Copy...**
3. Select the location you want to copy the order to, from the dropdown

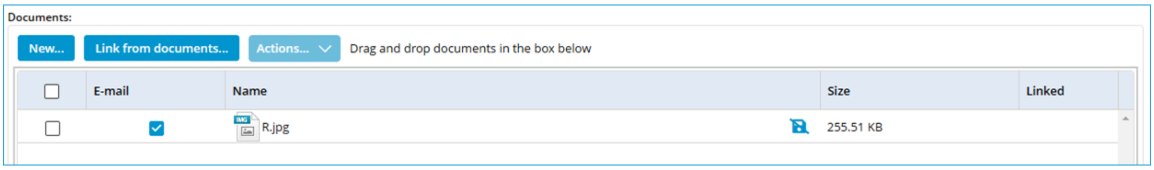


4. Click **Save & close**

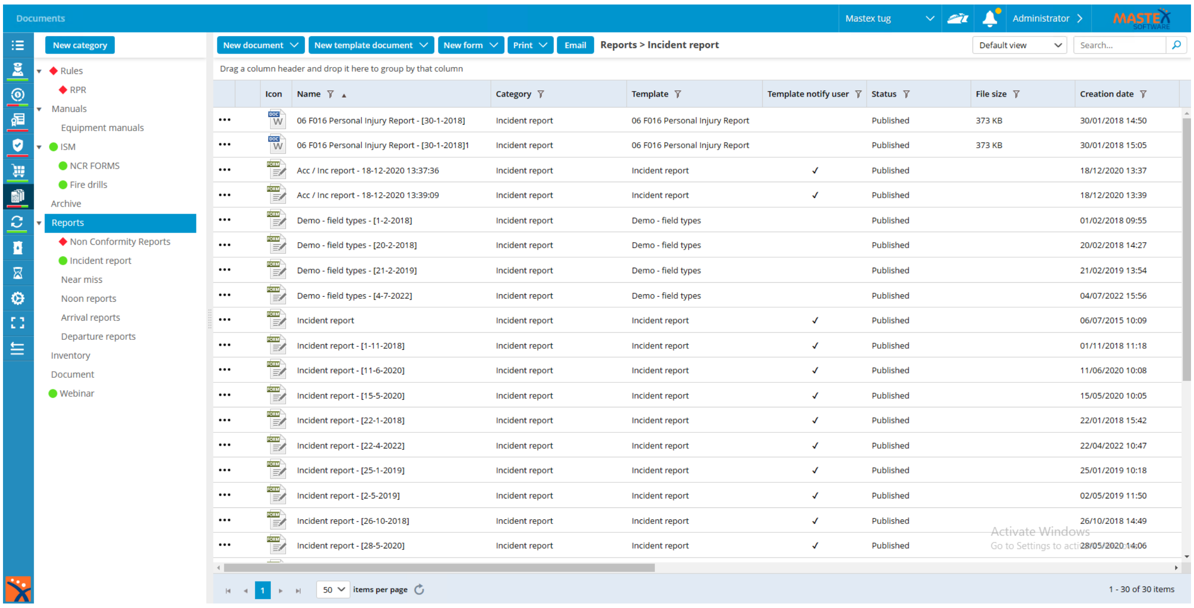
Note:
You may receive a warning when copying an order, if the part in the order is not linked to the destination location.
MXSuite will automatically link the part to the location.

10.16 How do I send an image of a part with the order?

1. If there is not yet an image linked to the part, add it following the instructions in the paragraph How do I add a document to an order line? 75
2. If you want to send the image with the order, tick the box in front of the image under the header **E-mail**



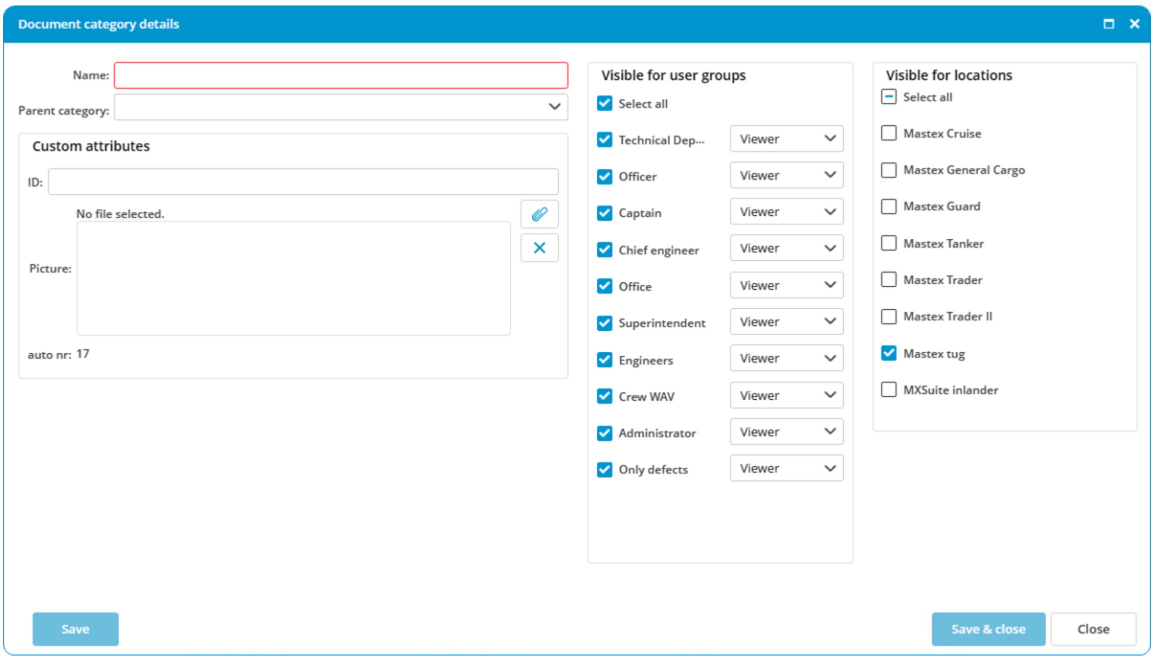
11 Documents



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.

11.1 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

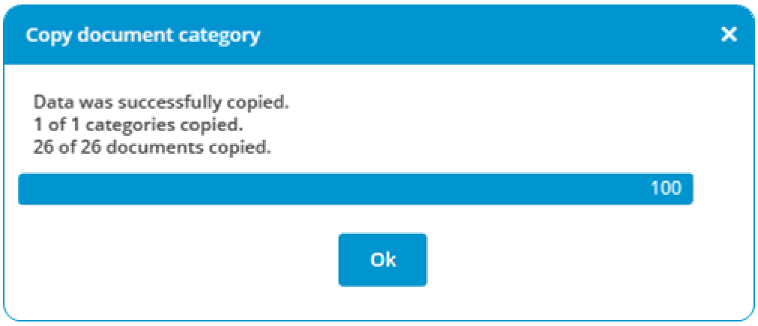


3. In the middle column, select the **user groups** that can view this new category and assign the desired rights
4. In the right column, select the **locations** that can view this category
5. Click on **Save and close**

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

11.2 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

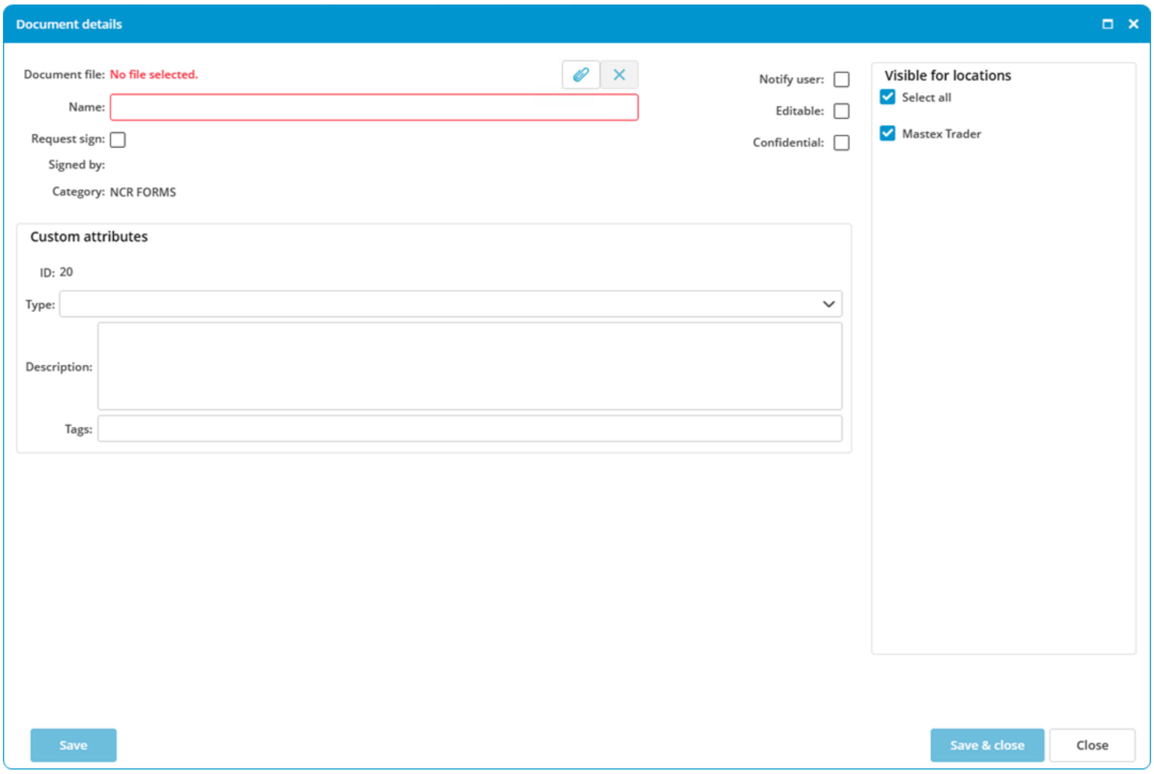


11.3 How do I assign roles to categories?

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

11.4 How do I create a new document?

1. Click on **New document**



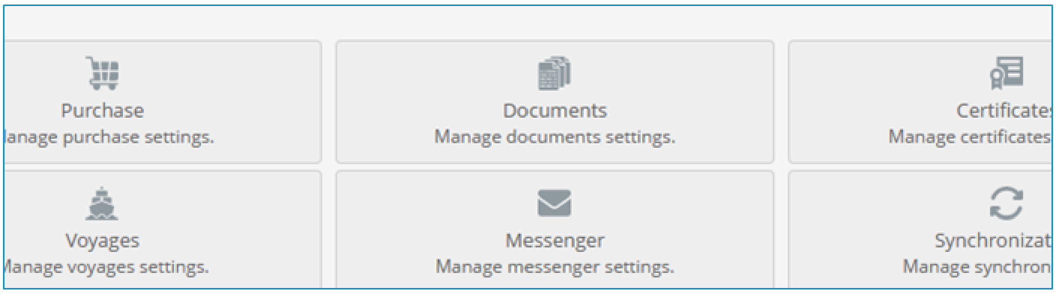
2. Click on  to select the **document**
3. Enter or edit the **Name**. The name of the document will be automatically generated based on the chosen document
4. In the right column, select the **locations** for which the document should be visible
5. Complete all required fields
6. Click on **Save & close**

Optional:

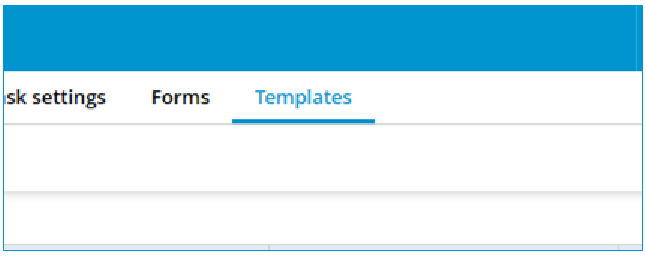
Description: Enter a description of the document.
Tags: To be able to search for certain words using the search function.
Confidential: Indicate whether this is a confidential document. Only authorised users will have access to this document. This document will not appear in the list for non-authorised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

11.5 How do I create a template?

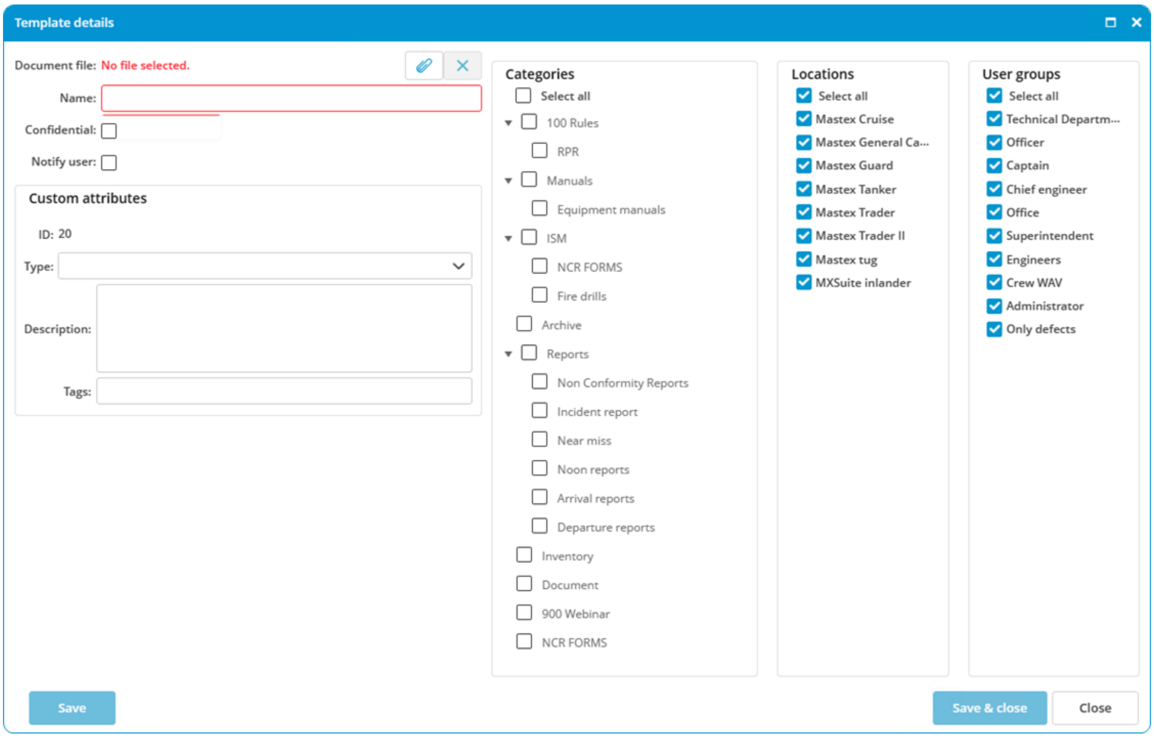
1. Click on **Administration** in the sidebar.
2. Select **Documents**



3. Select **Templates**



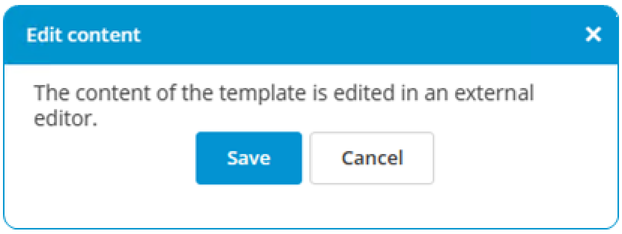
4. In the screen Manage templates, click on **New…** You can now enter the basic information from the new template



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 and close** to create the template

11.6 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



4. Click on **Save**

11.7 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

11.8 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**

11.9 How do I make a form ‘read only’?

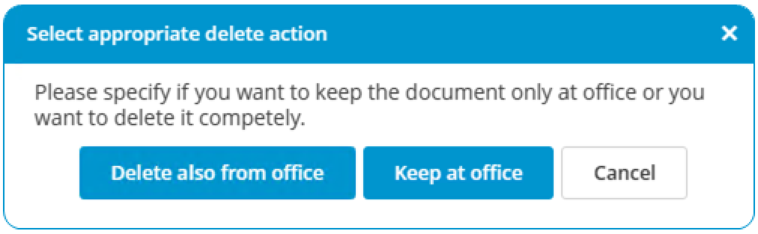
1. Right-click on the form
2. Select **Edit properties**...
3. Select the option **Is closed**

Please note:
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.

Important!
Only users with the authorisation **Allowed to reopen form** may reopen the form.

11.10 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



11.11 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.

11.12 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.

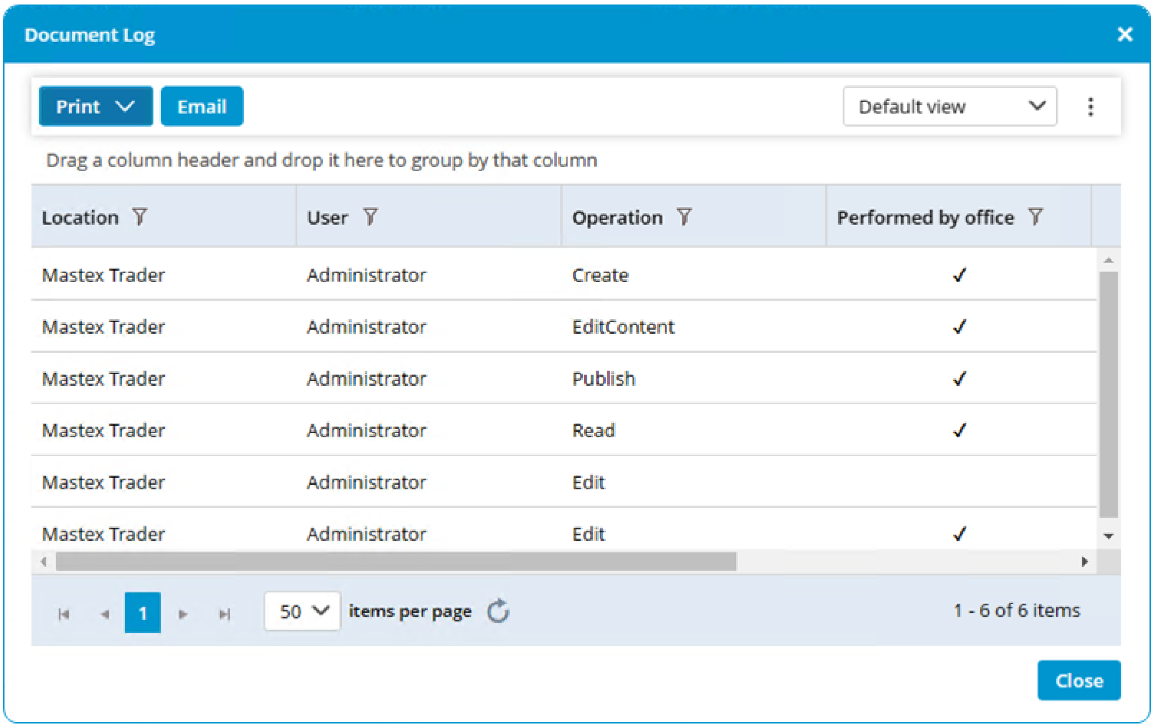
1. Right-click on the document
2. Select the option **Request edit**

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.

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

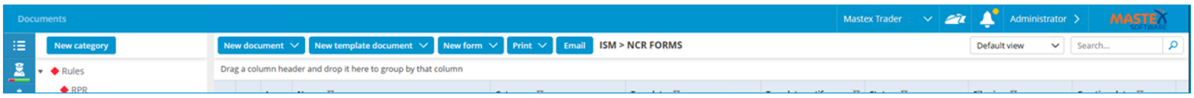
11.13 How do I see what happened to a document?

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



11.14 How do I search for a document?

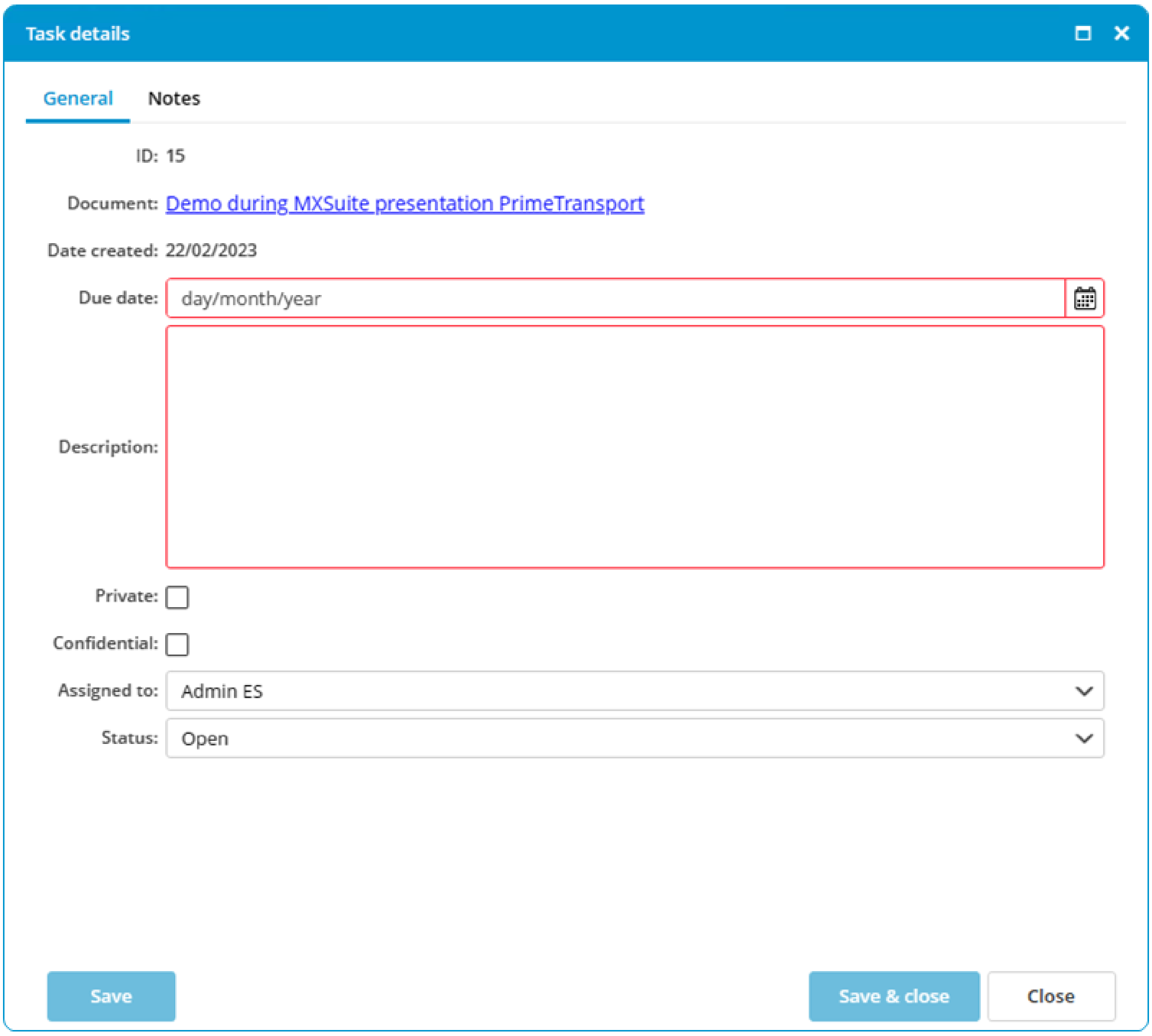
1. Enter a search term into **Search...**
2. All documents that contain the search term will be displayed



Note:
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.

11.15 How do I create a document task?

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

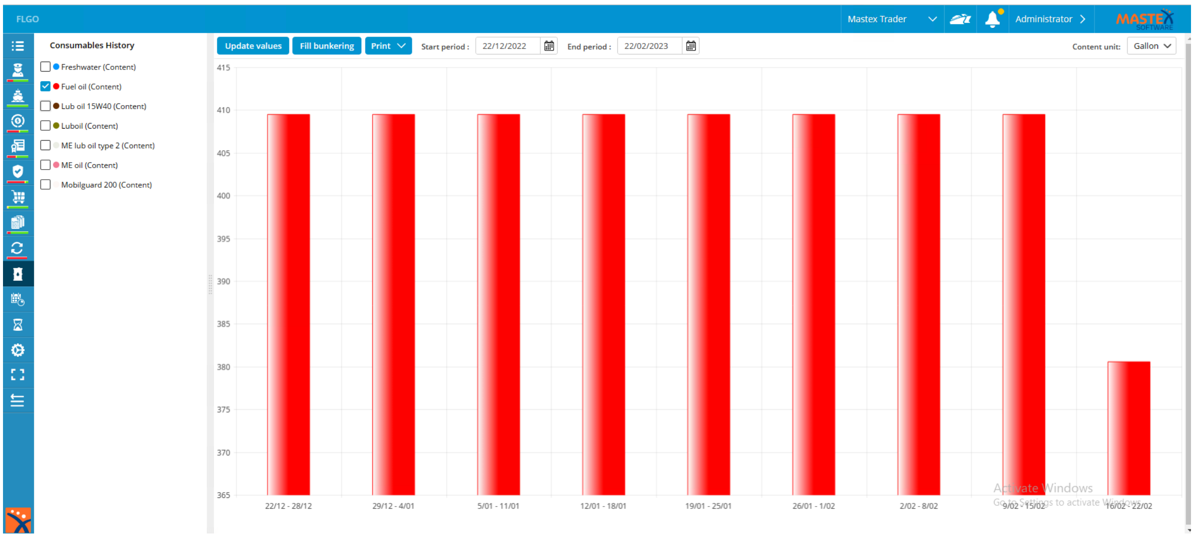


2. Enter the fields **Due date** and **Description**
3. Assign the task to a user
4. Select the **Status**
5. Click on **Save & close**

Optional:

Private: only visible by this person; not synchronized to the ship.
Confidential: only visible to the authorized user group.

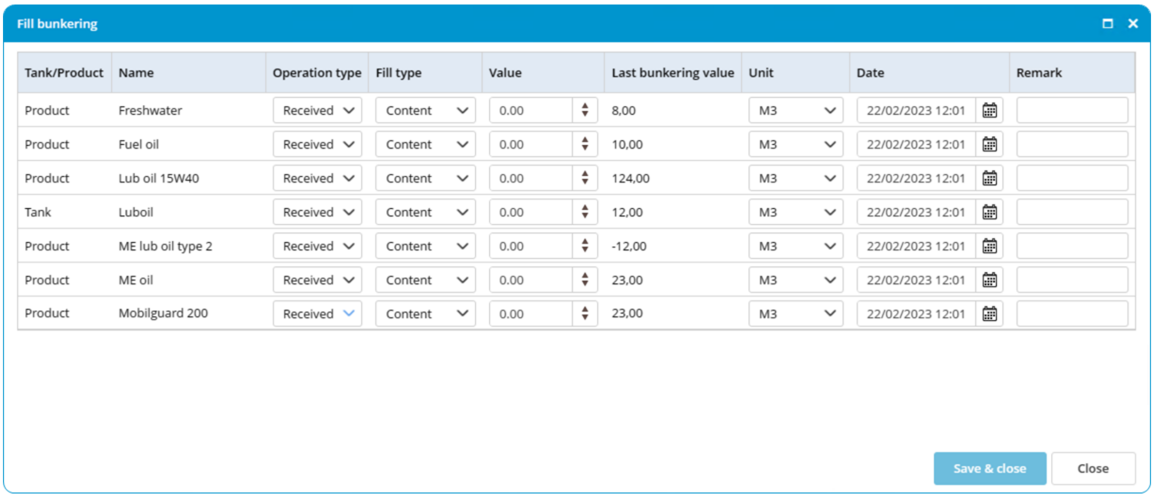
12 FLGO



FLGO stands for **F**uel, **L**ube and **G**as **O**il. By regularly entering the actual stock and all bunkered quantities, the module FLGO can calculate the consumption of each preferred period. This provides insight into consumption and costs.

12.1 How do I enter the actual values?

1. Click on **Update values**



Tank/Product	Name	Operation type	Fill type	Value	Last bunkering value	Unit	Date	Remark
Product	Freshwater	Received	Content	0.00	8,00	M3	22/02/2023 12:01	
Product	Fuel oil	Received	Content	0.00	10,00	M3	22/02/2023 12:01	
Product	Lub oil 15W40	Received	Content	0.00	124,00	M3	22/02/2023 12:01	
Tank	Luboil	Received	Content	0.00	12,00	M3	22/02/2023 12:01	
Product	ME lub oil type 2	Received	Content	0.00	-12,00	M3	22/02/2023 12:01	
Product	ME oil	Received	Content	0.00	23,00	M3	22/02/2023 12:01	
Product	Mobilguard 200	Received	Content	0.00	23,00	M3	22/02/2023 12:01	

2. Enter the actual measured values and click on **Save & close**

12.2 How do I enter received bunkering?

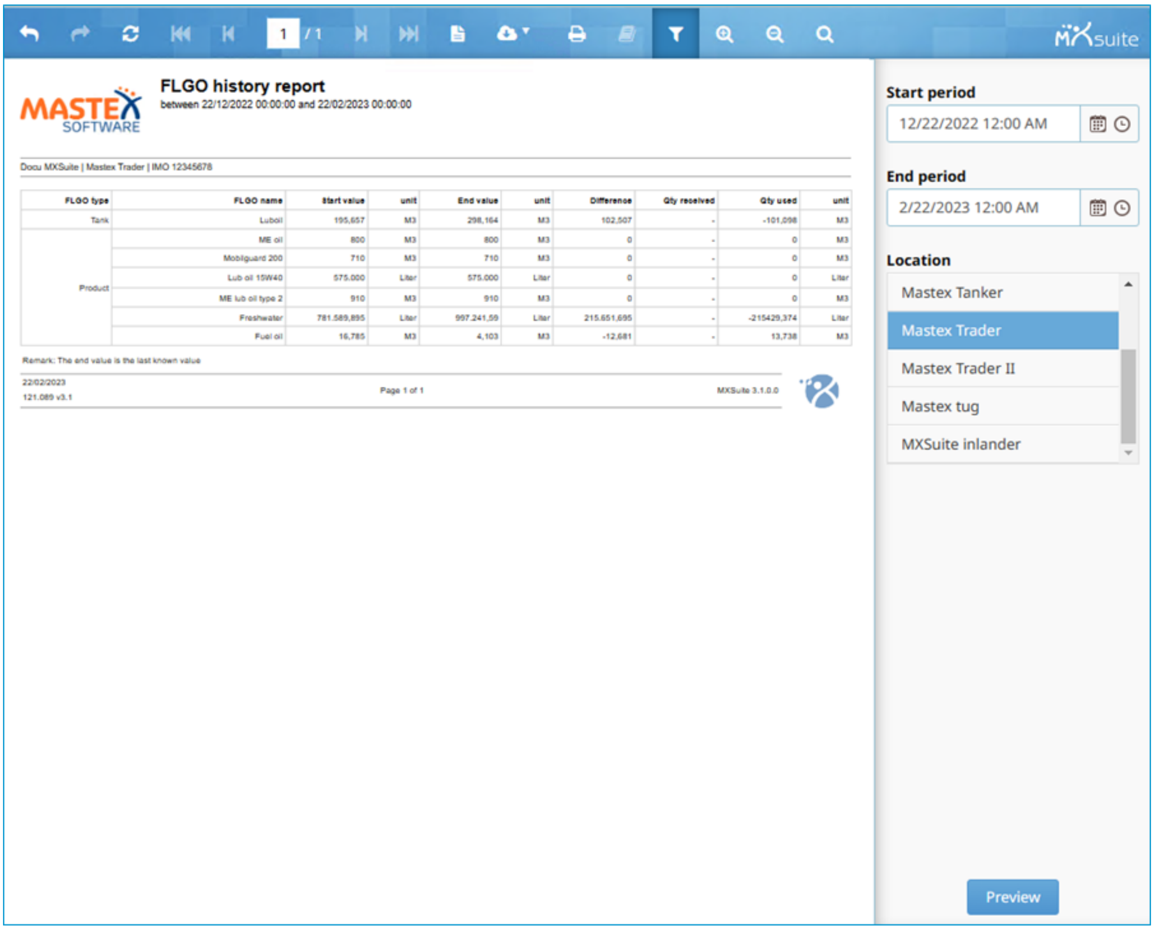
1. Click on **Fill bunkering**
2. At **Operation type**, select **Received** and enter the received quantities
3. Click on **Save**

12.3 How do I enter delivered bunkering?

1. Click on **Fill bunkering**
2. At **Operation type**, select **Delivered** and enter the delivered quantities
3. Click on **Save**

12.4 How can I see my consumption?

1. Click on **Print**



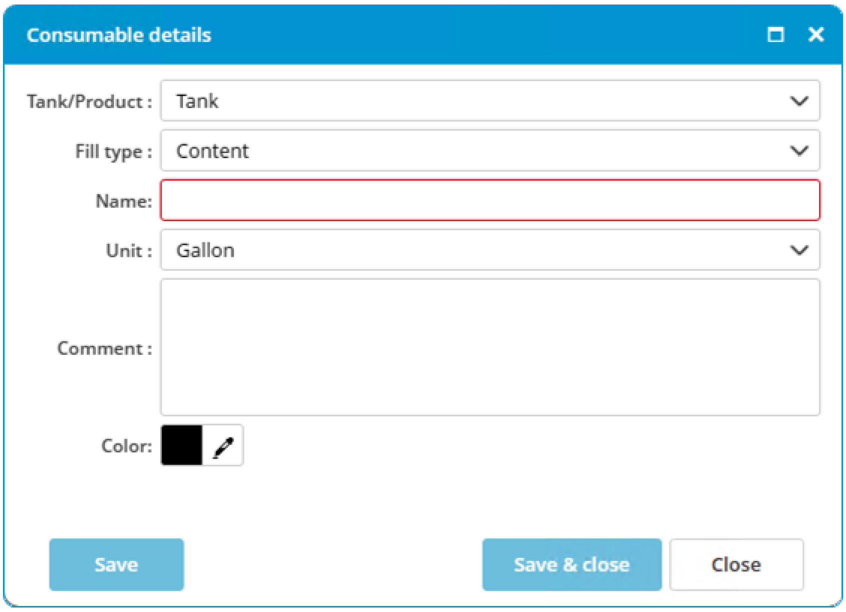
2. Select a **Start period** and **End period**
3. Select a **Location**
4. Click on **Preview**

12.5 How do I edit historical FLGO values?

1. Go to the module **History**
2. Select **FLGO**
3. Click on **Search** to search for the incorrect value
4. Right-click on a line
   a. Click on **Edit...** to edit a line
   b. Click on **Delete...** to delete a line

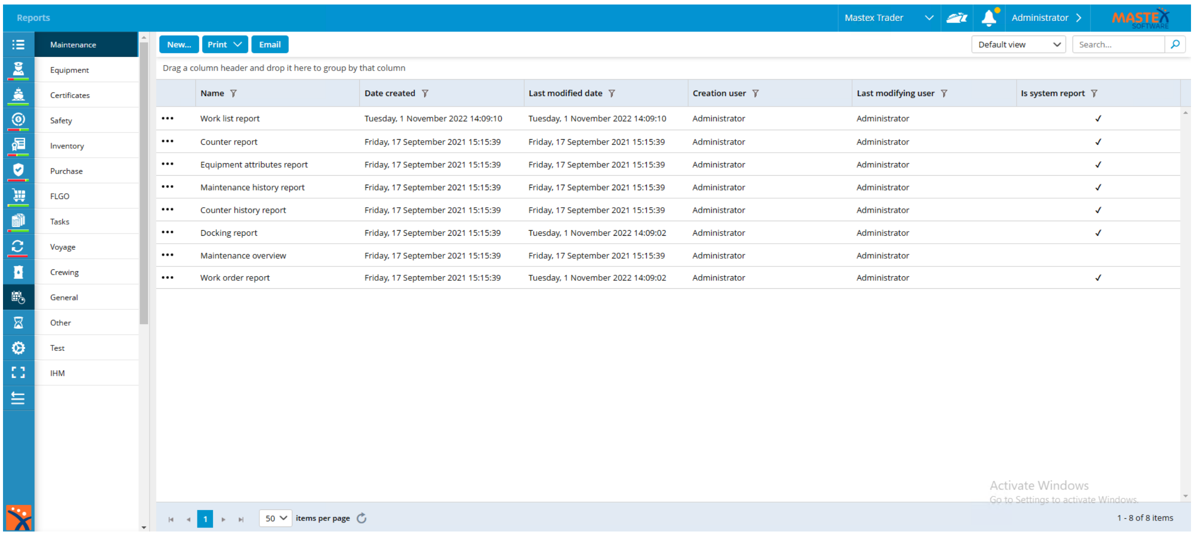
12.6 How do I create a new FLGO item?

1. Go to the module **Settings**
2. Click on **FLGO items**
3. Click on **New**
4. Enter the mandatory fields and click on **OK**



Tip:
If the desired unit cannot be selected, the MXSuite administrator can add this.

13 Reports

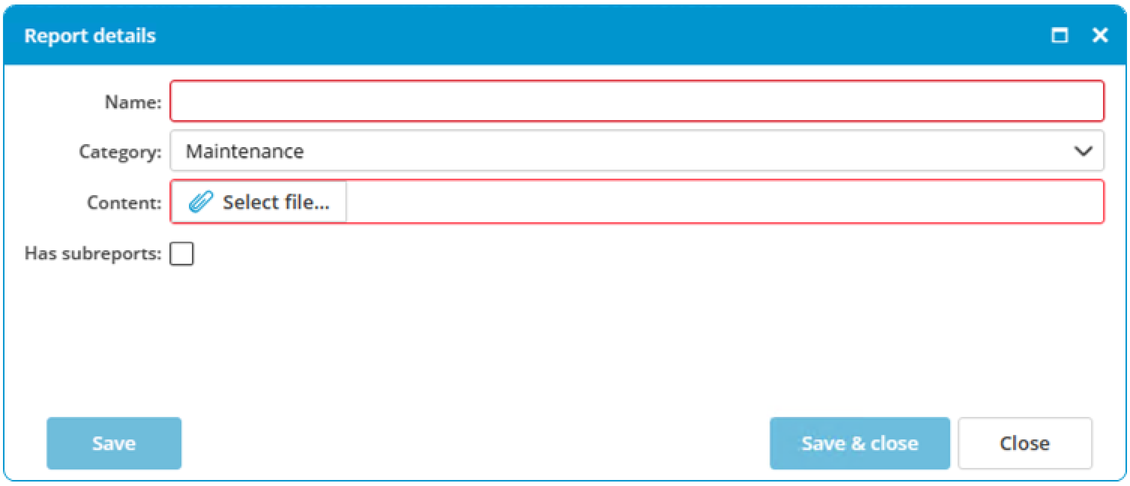


The module Reports accurately displays all database information. This gives users the opportunity to view the information they need and add them to a report.

MXSuite contains several default reports. You can also add your own reports to this module. Reports cannot be created in MXSuite, but require Microsoft SQL Report Builder v3. Users with sufficient knowledge of SQL Server and the MXSuite database structure can create their own reports. Mastex Software BV also offers this service.

13.1 How do I add a report?

1. Select the category in which to place the new report
2. Click on **New...**



3. Complete all required fields
4. Click on **Save & close**

13.2 How do I delete a report?

1. Right-click on the report you want to delete and select **Delete...**
2. Click on **Yes** to confirm deletion

Note:
Only non-system reports can be deleted.

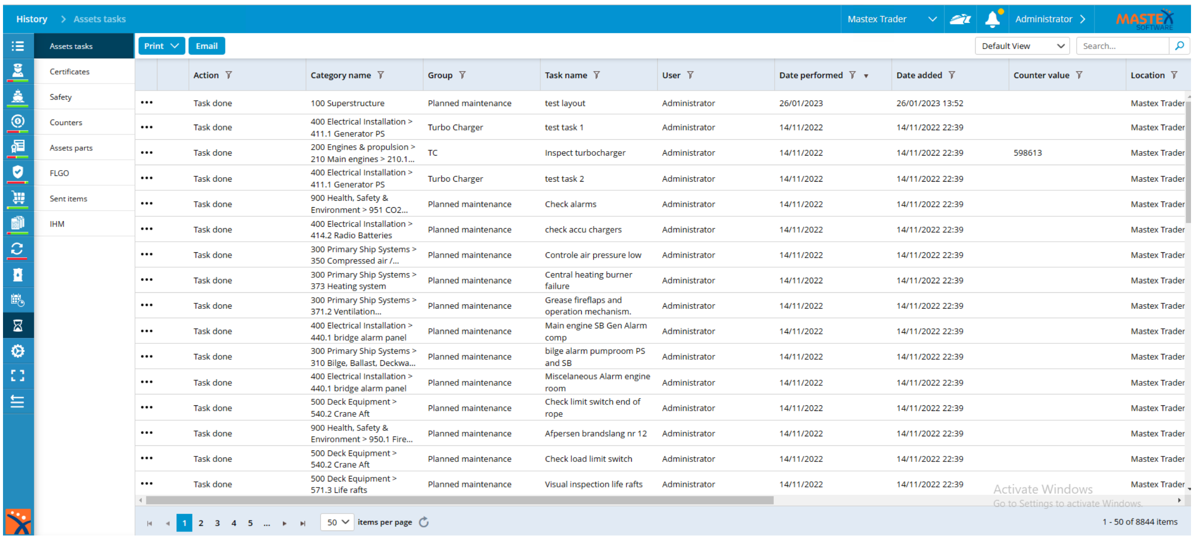
13.3 How do I delete a report category?

1. Right-click on the category you want to delete and select **Delete category...**
2. Click on **Yes** to confirm deletion

13.4 How do I change the properties of a report?

1. Right-click on the report and select **Edit...**
2. Change the data
3. Click on **Ok**

14 History



The history of the following modules can be viewed in the module History:

- Assets Tasks & Parts
- Counters
- Certificates
- Safety
- FLGO
- Sent items (emails)
- IHM

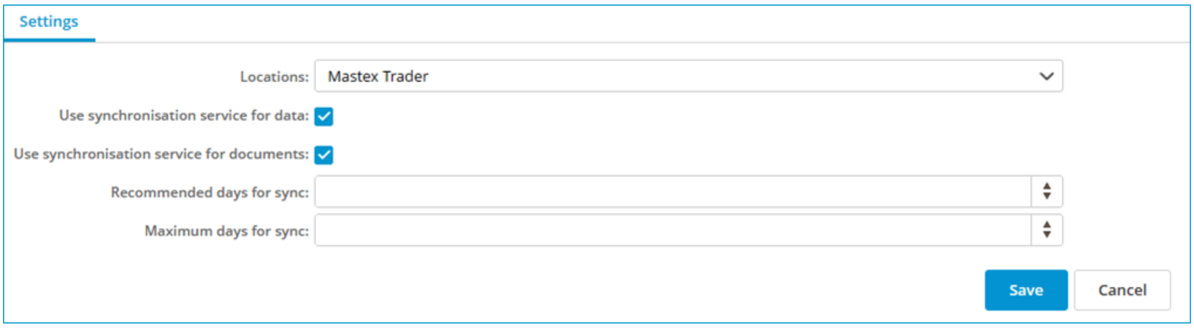
Tip:

Use the **Search** feature to quickly search for an item in the history.

15 Synchronisation

15.1 How do I turn a synchronisation flow on and off?

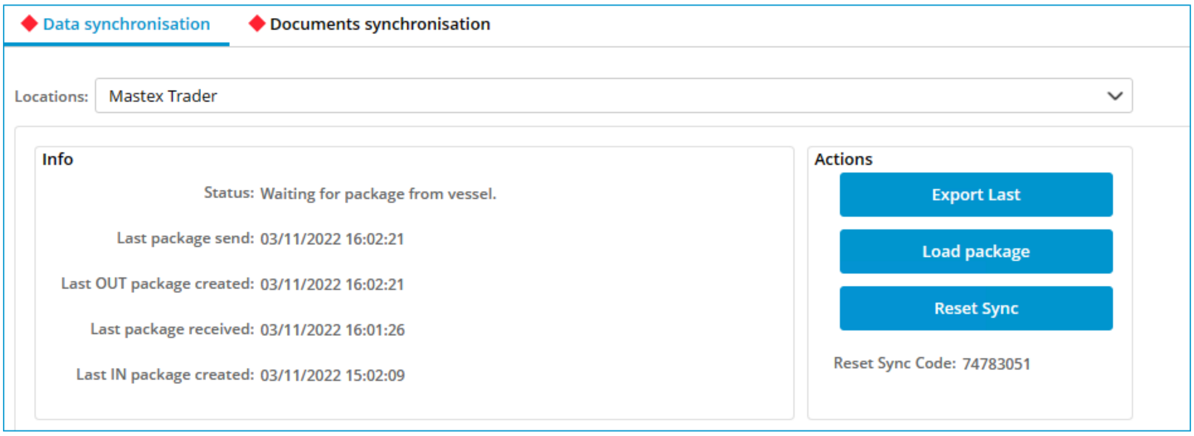
1. Go to the module **Administration**
2. Click on **Synchronization**
3. Select the location
4. Select the desired synchronisation flow. **Data synchronisation** or **Document synchronisation**
5. Automatic synchronisation can be turned on or off with the **Use synchronisation service** option



15.2 How can I check the synchronisation?

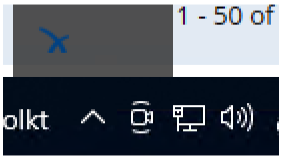
1. Go to the module **Synchronisation**
2. Select the location

The info block displays the information regarding the synchronisation of the most recently sent packages.



15.3 How can I check the status of the synchronisation process?

The icon of the MXSuite synchronisation service can be found at the lower right of the task bar.



The icon indicates the status of the synchronisation:

 This indicates that the synchronisation process is working normally and is idle.

 This indicates that the synchronisation process is working normally and synchronisation is taking place.

 This indicates that the synchronisation process is not working normally.

15.4 How do I synchronise manually?

To create and save a synchronisation package:

1. Go to the module **Synchronization**
2. Select the location
3. Click on **Export last** or on **Create package**
4. Select **Offline**
5. Click on **Ok**
6. Save the file to the desired location

To load a synchronisation package:

1. Go to the module **Synchronization**
2. Select the location
3. Click on **Load package**
4. Select **Offline**
5. Click on **Ok**
6. Open the desired file

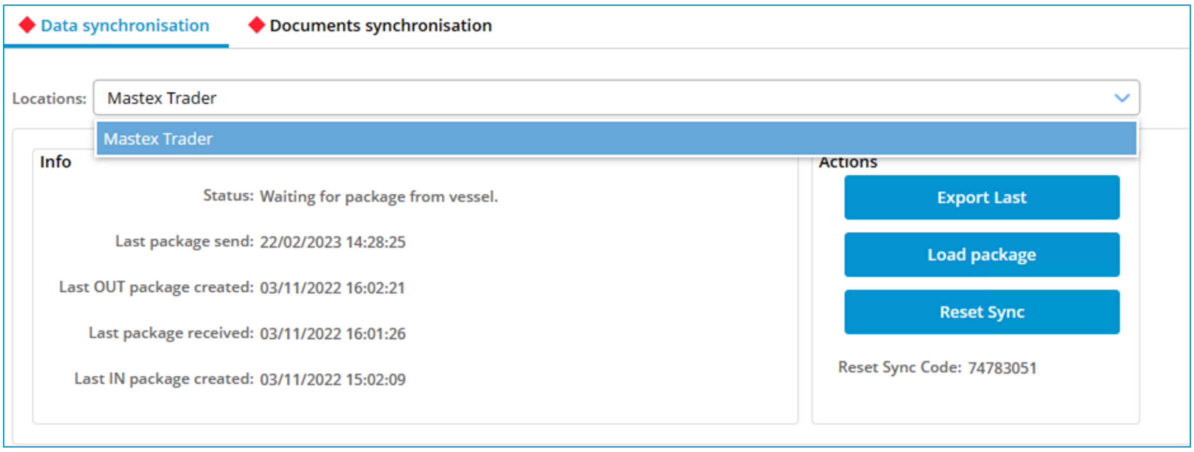
The file name is structured as follows:

<ship name>_Data_<package number>.mxs

<ship name>_Documents_<package number>.mxs

15.5 How can I check the synchronisation status of a multi office?

1. Go to the module **Synchronization**
2. Click on **Locations**
3. Select the desired office location



Please note:
The synchronisation status of a multi-office location is only visible at a primary office location and at the secondary office location concerned.

15.6 How do I reset the synchronisation?

The synchronisation needs to be done both in the office and on board the ship.

In the office:

1. Go to the module **Synchronization**
2. Click on **Reset Sync**
3. Answer the verification question with **Yes**
4. Click on **Create a package** to create the first synchronisation package
5. Note down the **Reset Sync Code** as displayed in the office version

On board the ship:

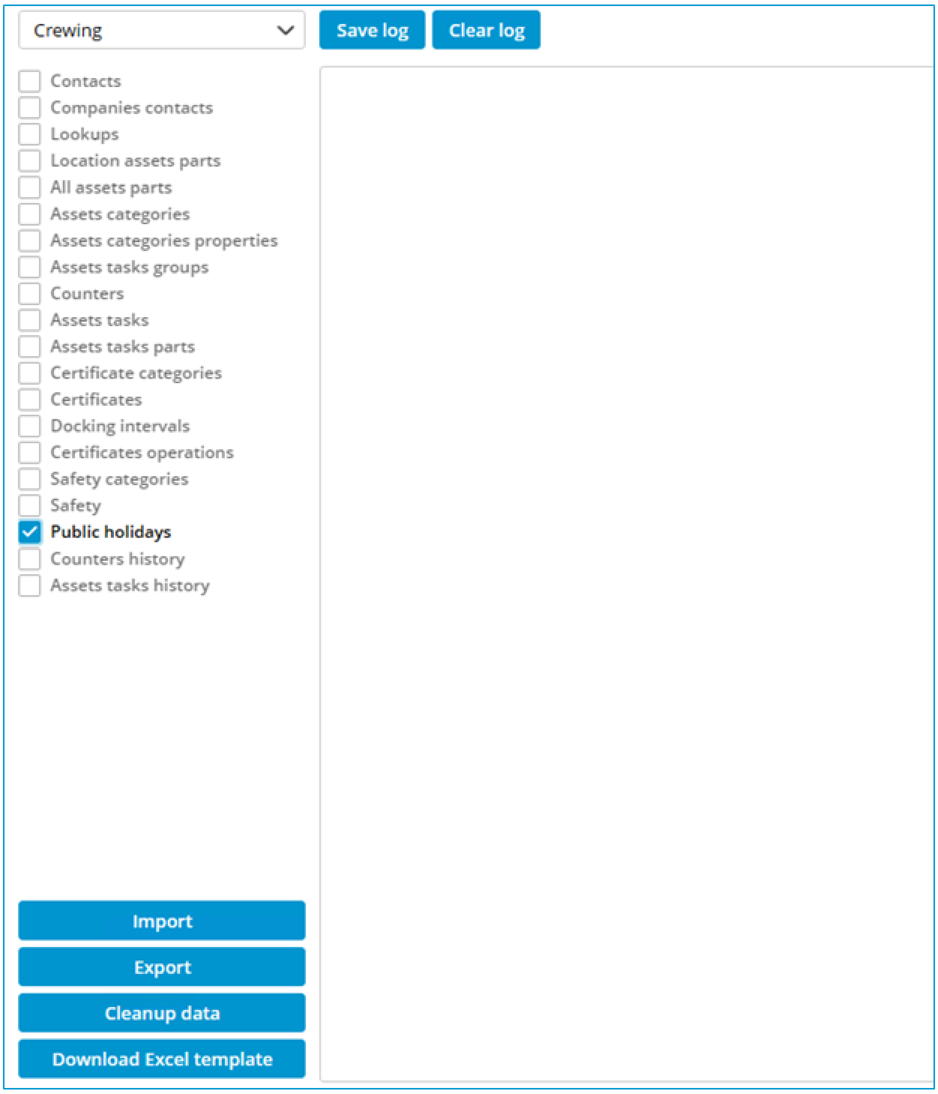
6. Go to the module **Synchronization**
7. Click on **Reset Sync**
8. Run the **Reset Sync Code** from point 6 and click on **Yes**
9. Click on **Load Package** to load the first synchronisation package

Please note:
A new Reset Sync Code is created each day, with each one being valid for just a single day.

Important!
The time between resetting the synchronisation and loading the first package on board the ship must be as short as possible. If tasks, certificates and exercises have been signed off on board the ship and the first package has not yet been processed, the new expiry date can be overwritten by the first synchronisation package.

15.7 How do I copy data?

1. Select the ship you want to copy data from
2. Go to the module **Administration**
3. Click on **Data**
4. Select the desired data and click **Export**



5. Select the ship to which you want to import the data
6. Select the same data within **Administration > Data** and click import
7. Select the downloaded excel file and click **Open** and **Yes**

Please note:

If **Machines** is selected, the following is copied:

- Categories
- Category details
- Task lists
- Tasks
- Related machine running hours
- Linked documents
- Linked articles

Important!

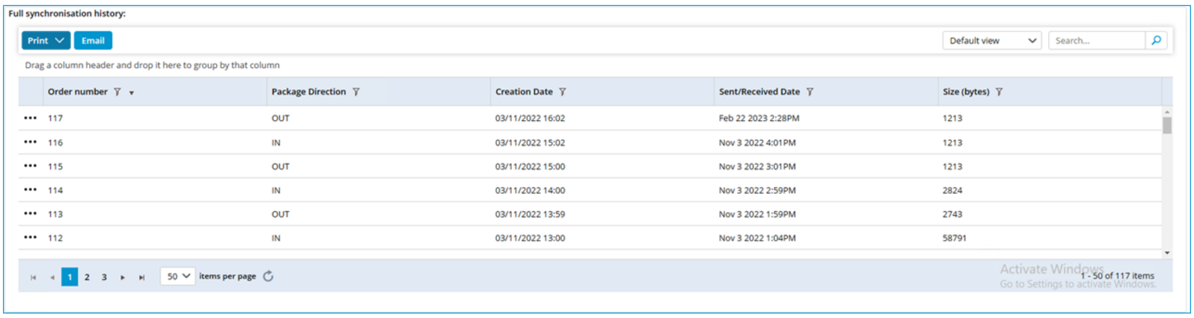
It is not possible to copy machines if both MXSuite Gold and Silver licenses are present.

15.8 What does 'Resume package' mean?

The button **Resume package** is visible when a synchronisation package is not completely loaded. This can occur if the loading of the synchronisation package is terminated prematurely owing to the computer being restarted, the database being temporarily inaccessible or another error message. Clicking on **Resume package** continues the package loading process.

15.9 What information does the synchronisation overview contain?

The following columns are visible in the synchronisation overview.



Order number: Synchronisation packages are assigned successive numbers and are only loaded if the number of the synchronisation package follows the number of the previous synchronisation package.

Package Direction: **OUT**: the package is sent to the other location.
IN: the package is received from the other location.

Creation Date: The date that the synchronisation package was created at the other location. Changes in MXSuite have been processed in the synchronisation package through to this date.

Sent/Received Date: The synchronisation package was sent from or received at the current location at this time and date. If a synchronisation package is resent by means of the button **Export last**, the date will be updated.

Size (bytes) This is the size of the synchronisation package in bytes. If a package is approximately 1200 bytes in size, the package will be empty.