201902

MX suite

user manual

SIMPLICITY IS THE KEY!

1 Getting started with MXSuite

1.1 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!

1.2 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	sales@mastexsoftware.com
Website	www.mastexsoftware.com

1.3 System requirements

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

Component	Minimal requirements
Processor	x64 Processor 2GHz. AMD Opteron, AMD Athlon 64, Intel Xeon, Intel Pentium IV
Memory	2 GB RAM
Operating system	Windows 7 Windows 2008
Hard drive	80 GB
Graphics	VGA resolution 1024x768
Database	Microsoft SQL Server 2012 Express

To make optimal use of MXSuite the following is recommended:

Component	Recommended
Processor	Intel i5 / i7 processor
Memory	4 GB RAM
Operating system	Windows 10 Windows Server 2012 R2 / 2016
Hard drive	80 GB; SSD
Graphics	Full HD, resolution 1920x1080
Database	At office: Microsoft SQL Server 2012 / 2014 / 2016 Standard On board: Microsoft SQL Server 2012 / 2014 / 2016 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:

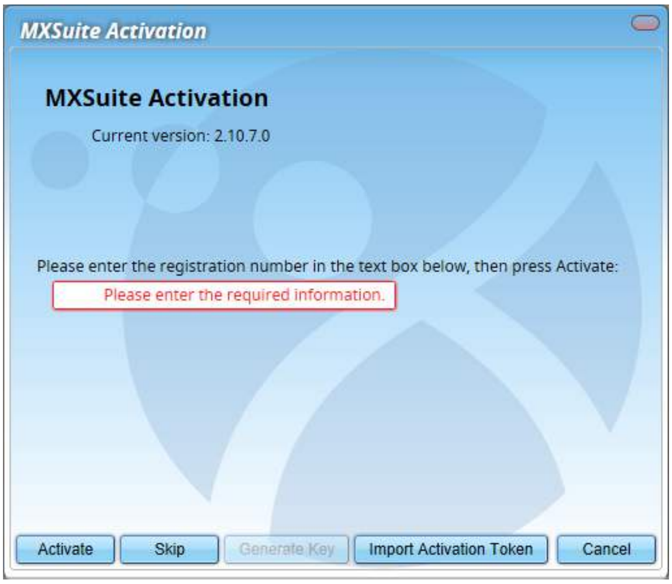
- Maximum 1 GB memory usage
- A maximum of 10 GB of data storage (attachments in MXSuite are not included)

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 the 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. Start up MXSuite. On the login screen click 

2. Enter your current password and then enter your new password twice

3. Click on Ok

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
Maintenance	maintenance is in good order the maintenance task expires this week this maintenance task should have been completed
Running hours	the running hours were recently updated the actual running hours have to be entered the actual running hours 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
Inventory	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
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
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

1.8 Date and time notation in MXSuite

The date and time notation as displayed in MXSuite is copied from the computer on which MXSuite was loaded.

2 View settings

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 view is saved and displayed next time by default.

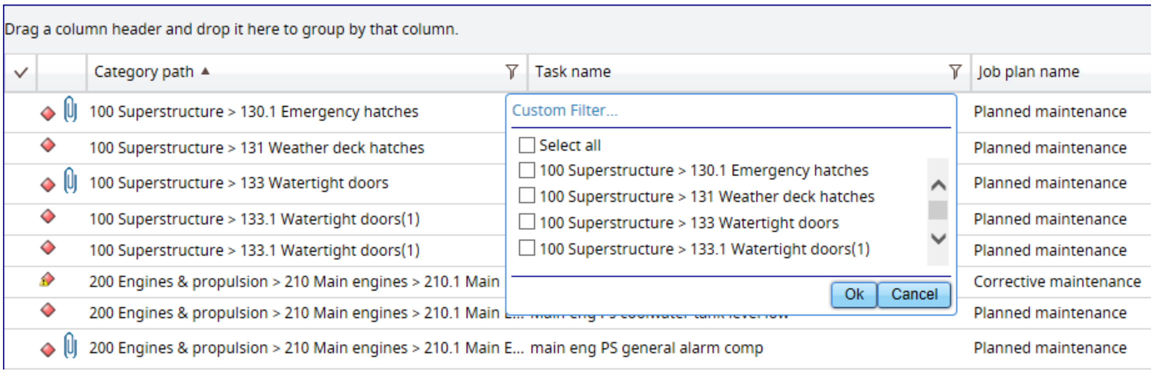
The following view options are possible:

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

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

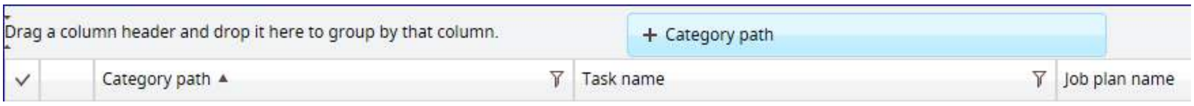


3. Click on **Ok**

> **Note:**
> Active filters can be identified by the coloured filter symbol above the relevant column.

2.2 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.

2.3 How do I search in a view?

Enter the search term in the search bar.

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

2.4 How do I print a view?

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

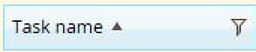
1. Click on **Print**
2. The view will be printed as seen on the screen

2.5 How can I change the ordering in a view?

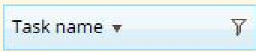
1. Go to the column name in question
2. Click on the column name to change the ordering

Tip:

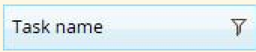
Look next to the column name to see how the column is sorted. There are 3 options:



Ascending order.



Descending order.



Ordered according to the display settings.

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**

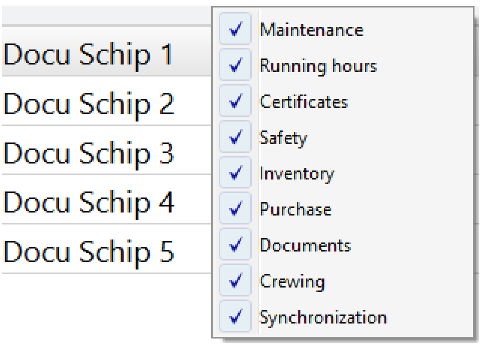
3.2 Why am I missing a module in the overview?

This may be due to the following reasons:

- The module was not selected in the list of visible modules. Follow the steps below to change the visibility
- The user is not fully authorised
- The module is not a part of the license

Follow the steps below to hide modules or to make them visible:

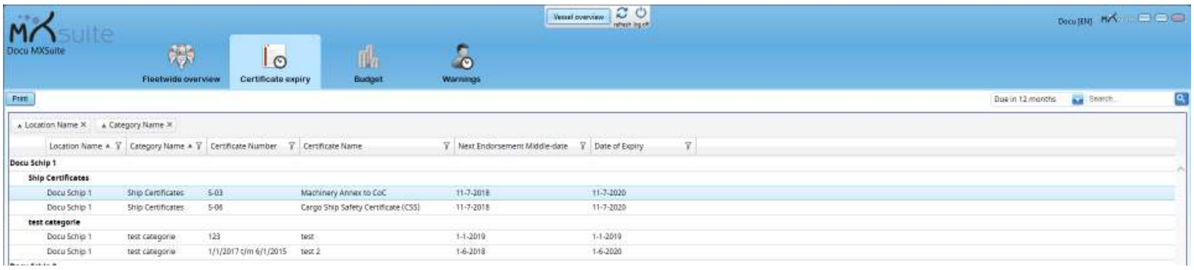
1. Right-click on the title of a column



2. Click on the desired **module** to view or hide it

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

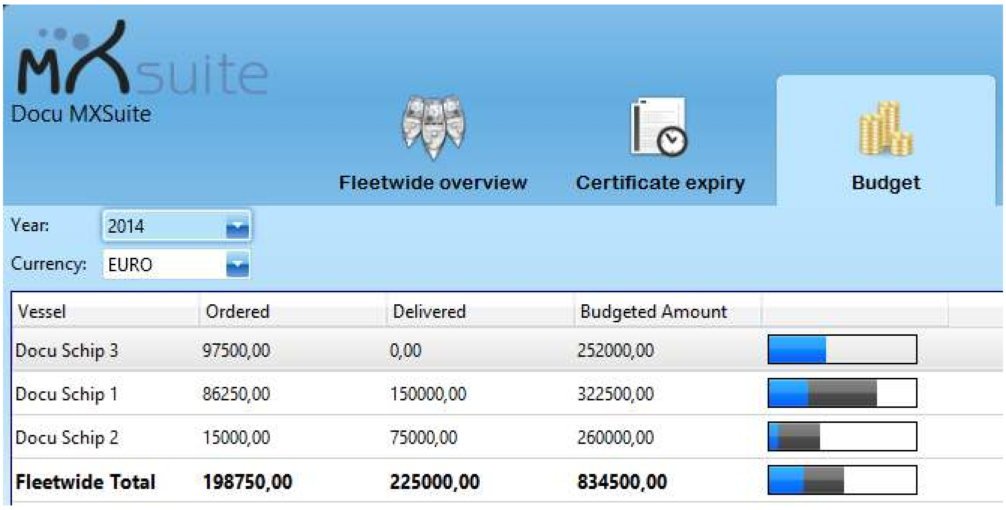
In the fleetwide overview, click on **Certificate expiry**.



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 button at the top right of the screen.

3.4 How do I see a budget summary for the whole fleet?

Click on **Budget** in the fleetwide overview and select the desired **Year**.



The table displays the total budget per ship, as well as the amount currently being processed for delivery and the amount that has already been delivered.

This is also displayed in a coloured bar as:

Blue: ordered parts

Black: delivered parts

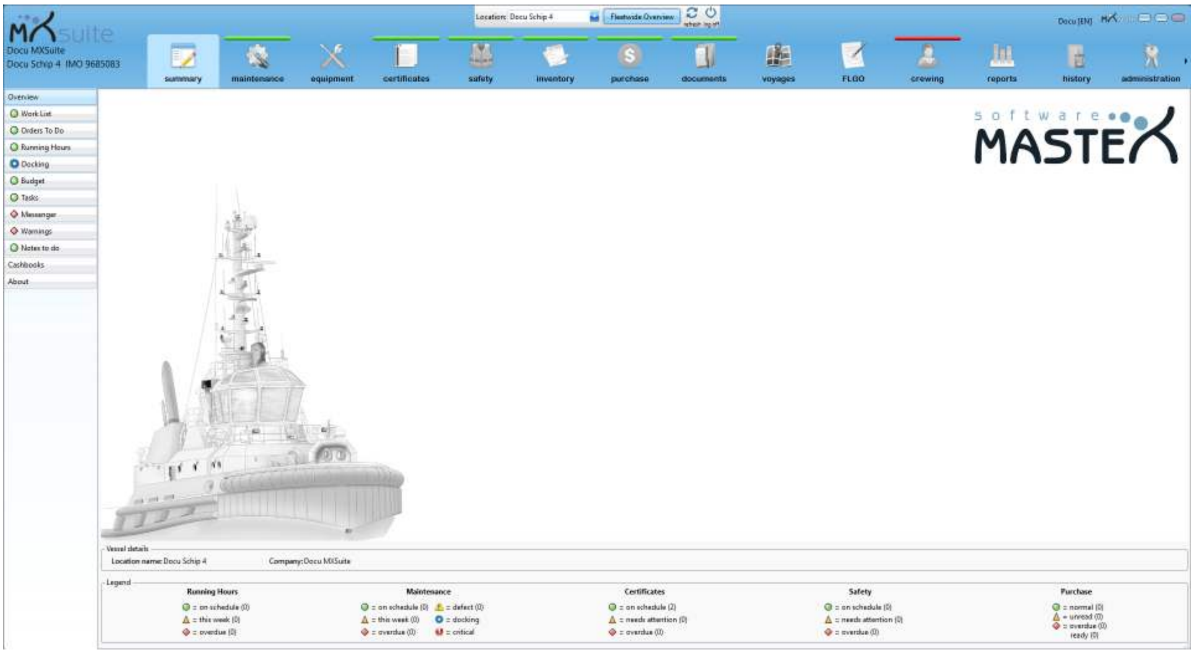
White: available budget

3.5 What is the function of the Warnings button in the fleet overview?

It performs the same function as the option **Warnings** in the Crewing module.

See "How can I tell which of my crew members' documents are expired?" on page 20

4 Summary



This is the home screen that will appear when MXSuite is opened on the ship.
All modules can be opened from this screen. A menu can be found to the left. The menu features are described in the next few paragraphs.

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** 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

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Group / Part	Due date	Comments
100 Superstructure > 130.1 Emergency hatches > Planned maintenance		
☐ Check emergency hatches	17-2-2018	
100 Superstructure > 131 Weather deck hatches > Planned maintenance		
☐ check and grease hatch whiskers(sliding bolts)	17-5-2017	
100 Superstructure > 133 Watertight doors > Planned maintenance		
☐ Grease all watertight doors.	15-1-2018	

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 finalised 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 **Enter**
2. Enter the running hours per machine
3. Click on **Ok**

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 **Running hours**
2. Click on **New...**
3. Enter the name
4. Click on **Ok**

4.5 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 dockings are also illustrated in a graph. This view is based on the module Certificates, which also shows an overview of dockings.

4.6 What is the status of my annual budget?

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

An annual budget will appear for each ledger account. The coloured bar shows the status of the budget per ledger account, per year.
The bar will be blue for orders
The bar will be grey for deliveries
A mark will indicate when a budget has been exceeded

4.7 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.

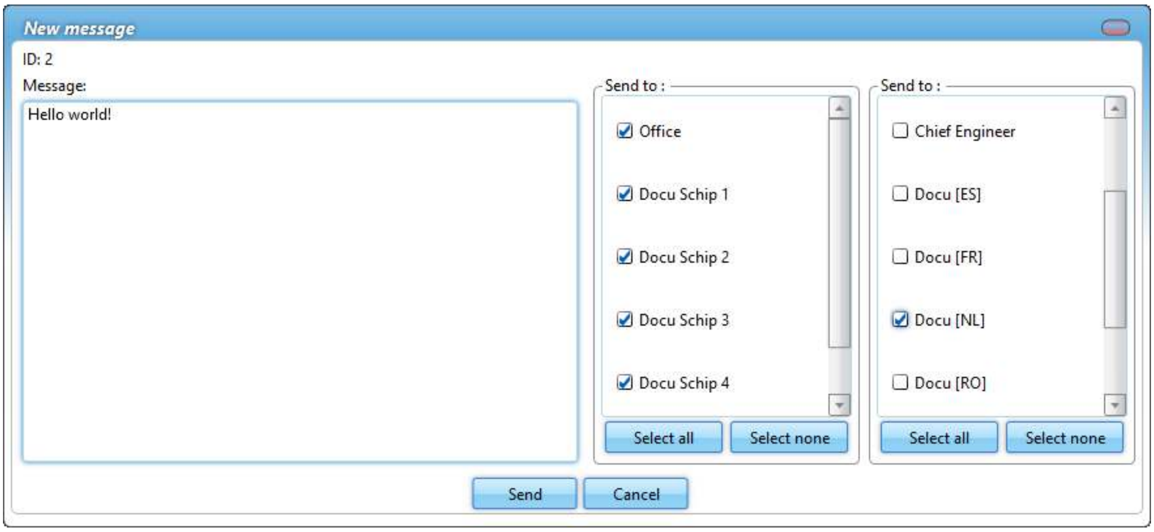
Click on a task to view and edit the information. Document tasks are generally created in the module Documents, but they can also be created in this overview by clicking on **New...**

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

4.8 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**

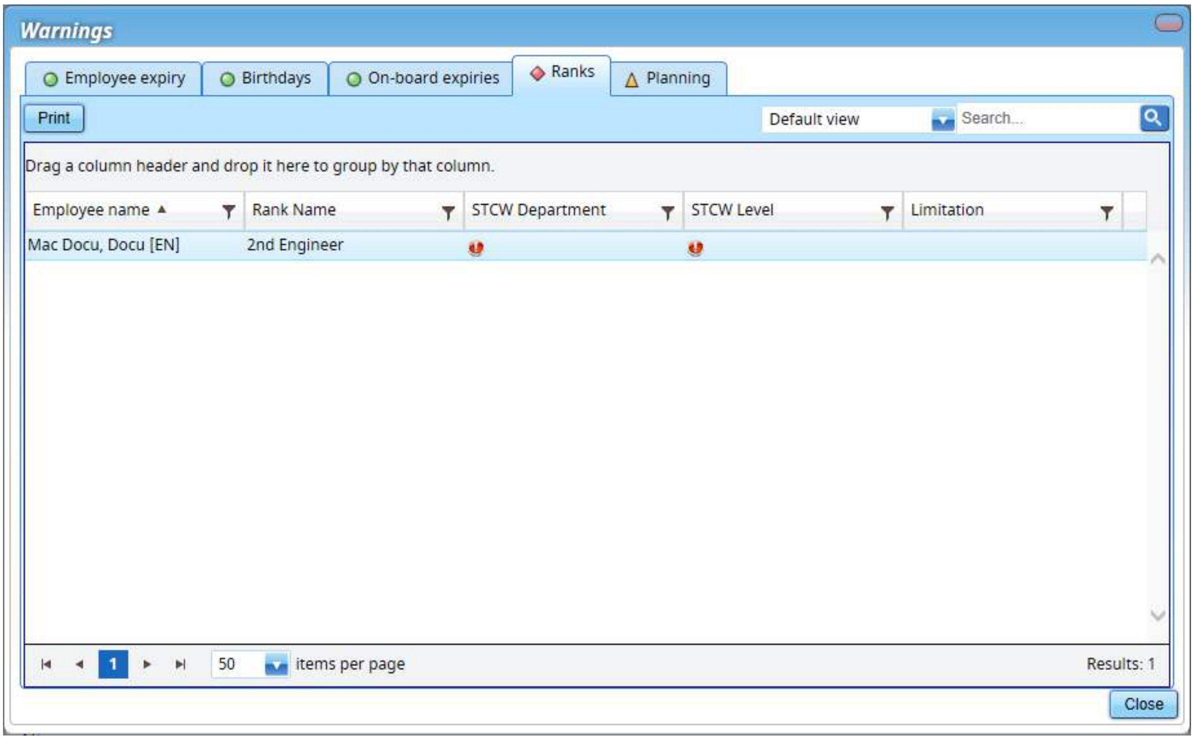


3. Write your message
4. Select **Location** and user (if applicable)
5. Click on **Send**

A new message will appear as a post-it note in the overview.

4.9 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.

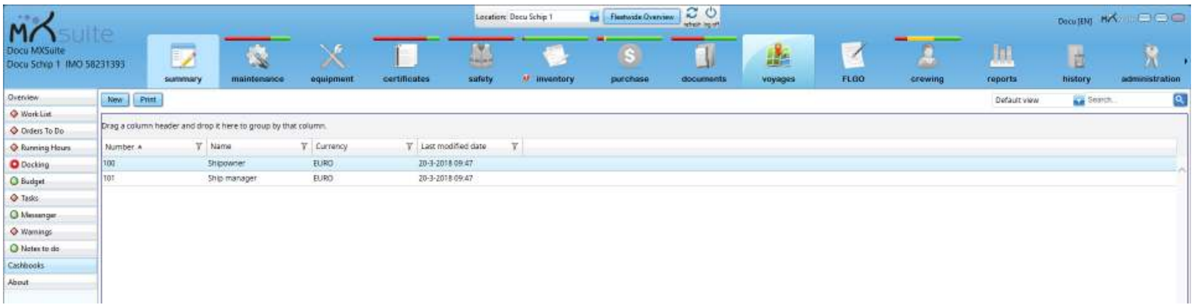
Planning: This shows the planning warnings, such as failure to meet the safe manning requirements.

4.10 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 Cash book



It is possible to keep a cash book in MXSuite. Multiple cash books can be created, after which transactions can be added per cash book.

Each cash book is linked to a specific currency and has a unique identification number. In addition to the date and the amount, you also have the option of saving a document per transaction.

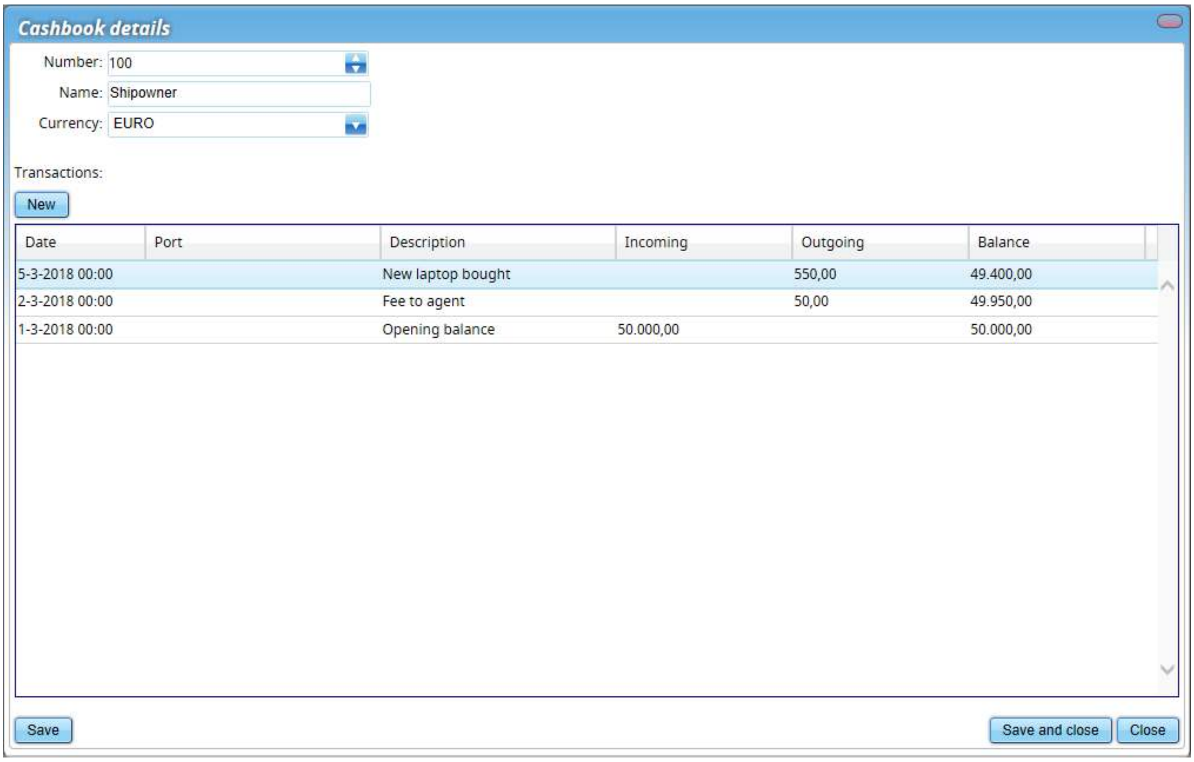
5.1 How do I create a new cash book?

1. Click on **Cash books**
2. Click on **New** to create a new cash book
3. Change the **Number** of the new cash book if desired
4. Enter the **Name** of the cash book
5. Select the **Currency**
6. Click on **Save and close** to create the cash book

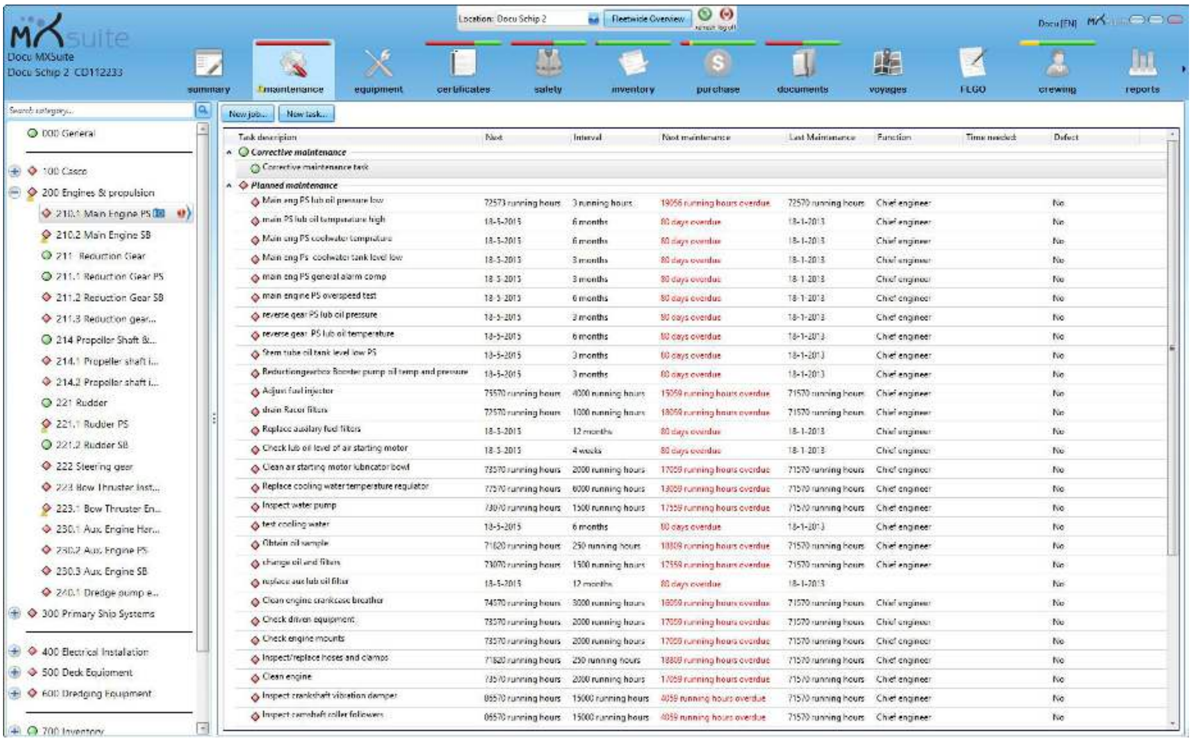
Number ▲	Name	Currency	Last modified date
100	Shipowner	EURO	20-3-2018 09:47
101	Ship manager	EURO	20-3-2018 09:47

5.2 How do I create new transactions?

1. Click on **Cash books**
2. Right-click on the desired cash book and select **Open**
3. Click on **New**
4. Complete all required fields
5. Click on **Save and close**


Cashbook details
Number: 100
Name: Shipowner
Currency: EURO
Transactions:
New
Date
Port
Description
Incoming
Outgoing
Balance
5-3-2018 00:00
New laptop bought
550,00
49.400,00
2-3-2018 00:00
Fee to agent
50,00
49.950,00
1-3-2018 00:00
Opening balance
50.000,00
50.000,00
Save
Save and close
Close

6 Maintenance



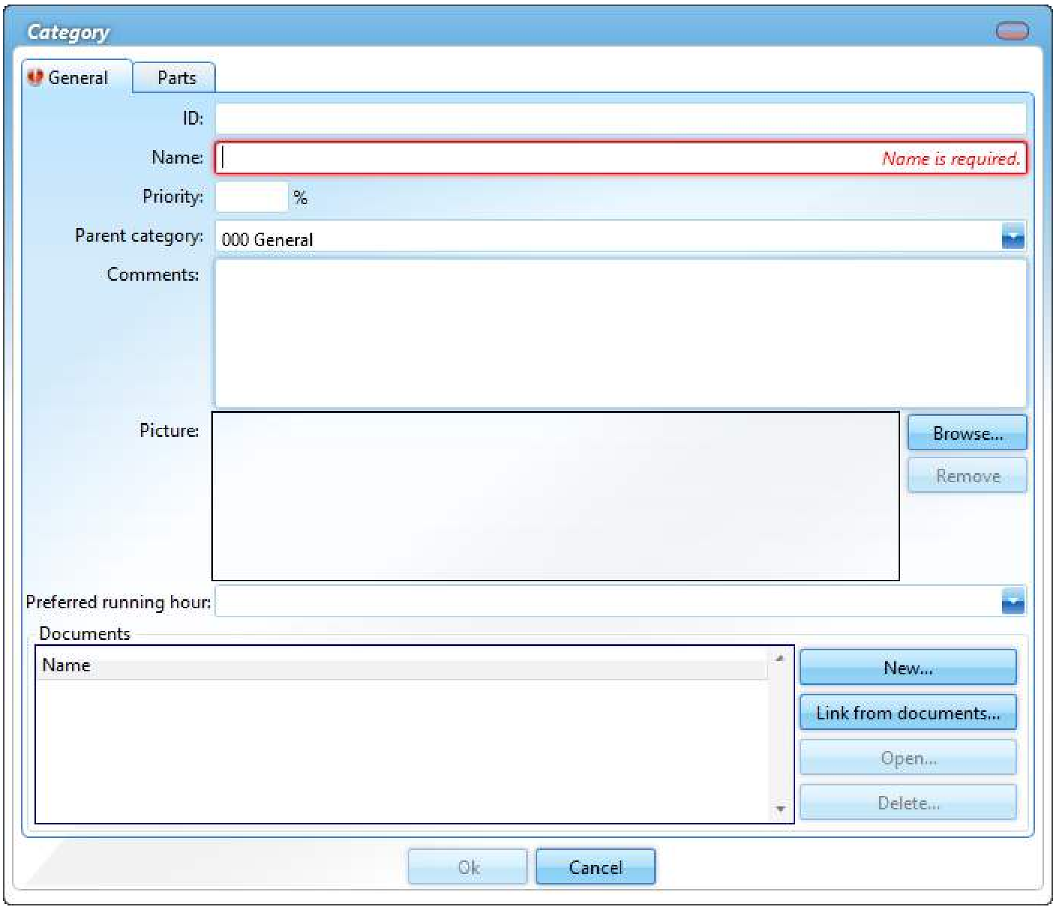
The module Maintenance is designed to register all maintenance tasks. Maintenance tasks can be based on running hours or on time intervals. As soon as a task is scheduled, it is added to the work list.

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.

6.1 How do I create a new category?

1. Right-click on a category. The new category will be created as a subcategory of the existing 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.

6.2 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

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

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

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

6.4 How do I search for a category?

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

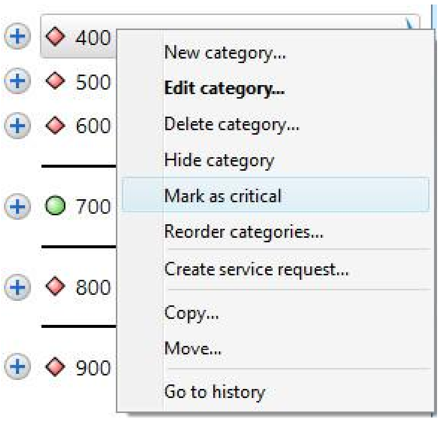
1. Enter the name or partial name of the category
2. Click on
3. The tree structure will now only show the categories in which the search term appears

Tip:

To display all categories, delete the search term and click on .

6.5 How do I mark a category as critical?

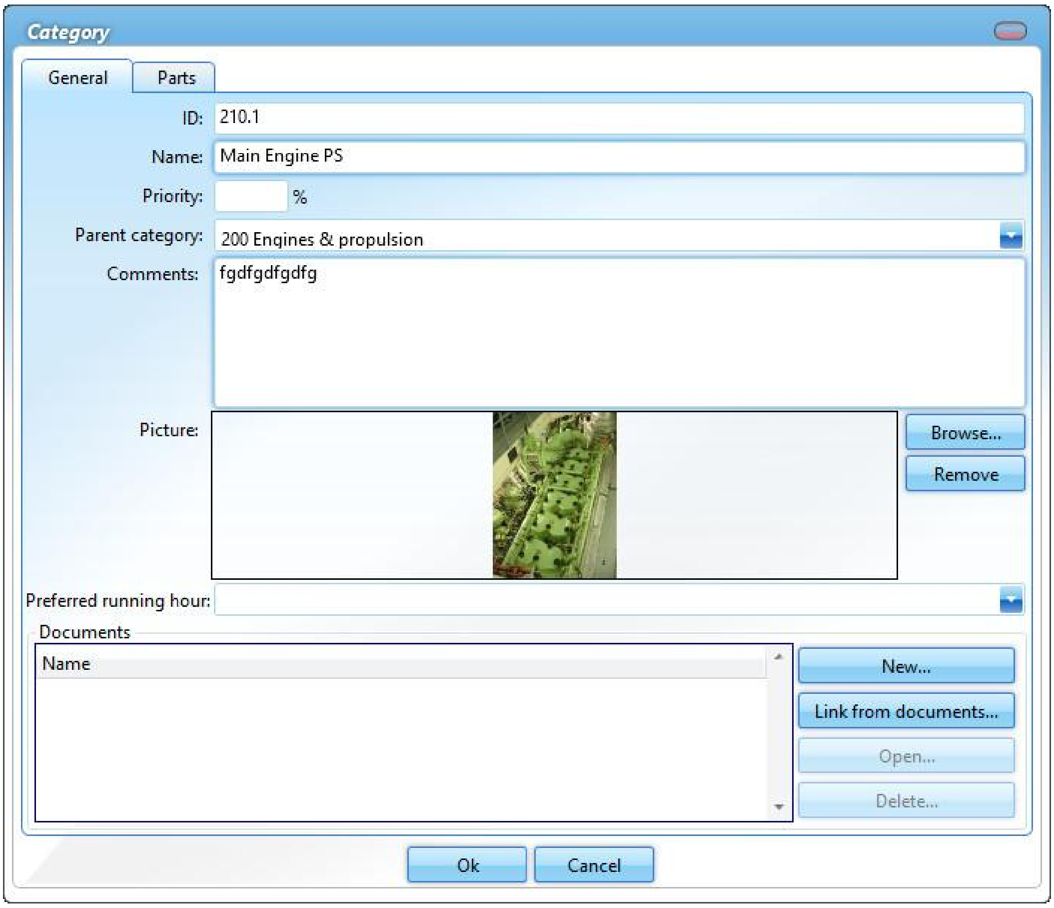
Right-click on a category and select **Make critical**.



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.

6.6 How do I add a photo to a category?

1. Right-click on a category and select **Edit category...**
2. Click on **Browse...**



3. Select the image
   Permitted image formats are: .BMP .DIB .RLE .JPG .JPEG .JPE .JFIF .GIF .TIF .TIFF .PNG
4. Click on **Ok**

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

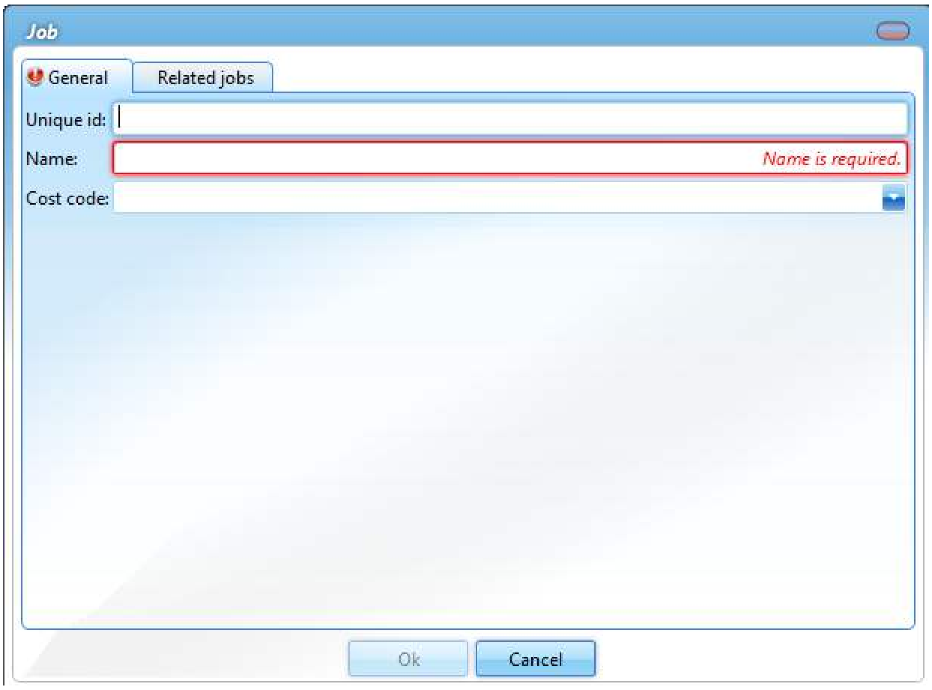
The same process is used to change the order of a category, job or task in MXSuite.

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

6.8 How do I create a job?

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

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



3. Click on **Ok**

6.9 How do I relate jobs?

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 job.

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

Job machine B	ID	Tasks
Planned maintenance	1.1	Replace the filter
	1.2	Refresh oil
	1.5	Measure battery voltage

Below you will find the situation after the job is related to another job.
The relationship was created from the job of machine A. The task with ID 1.5 of machine B was removed after the job 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.

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

Job machine B	ID	Tasks
Planned maintenance	1.1	Replace the filter
	1.2	Check level of lubricating oil
	1.3	Refresh oil
	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.

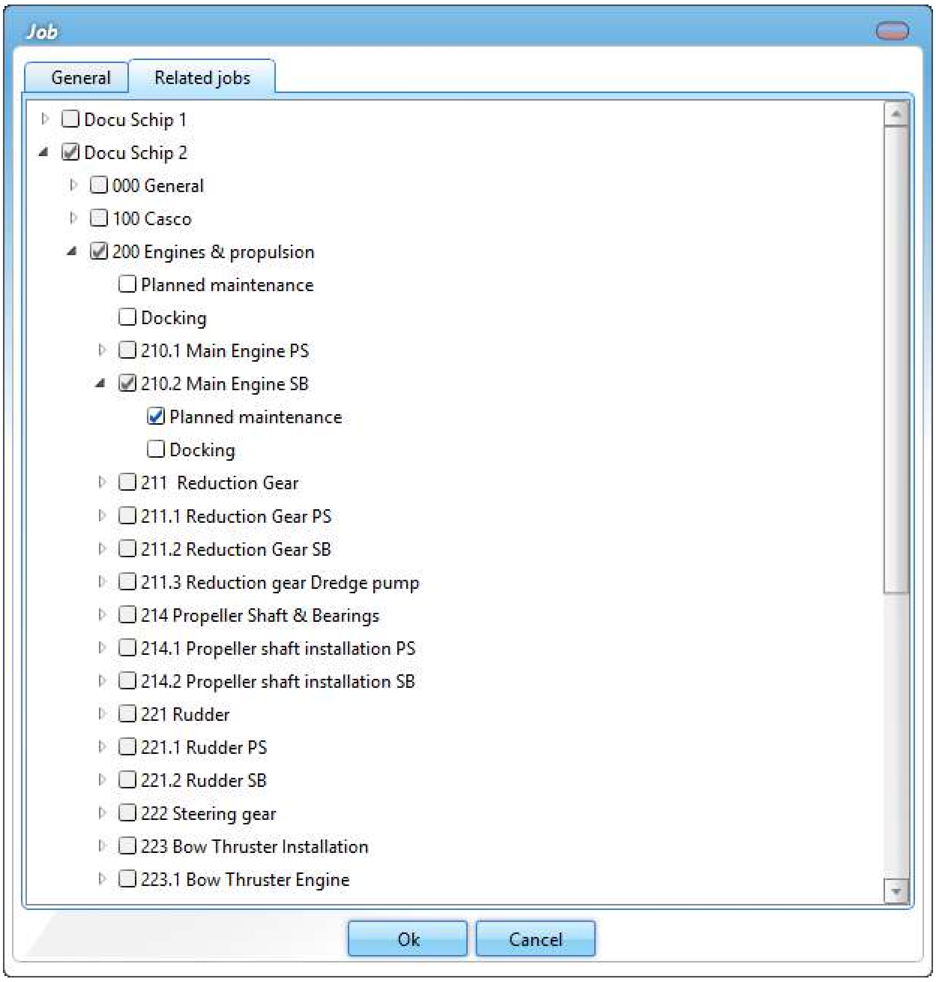
Roadmap:

To relate jobs, the following conditions must be met:

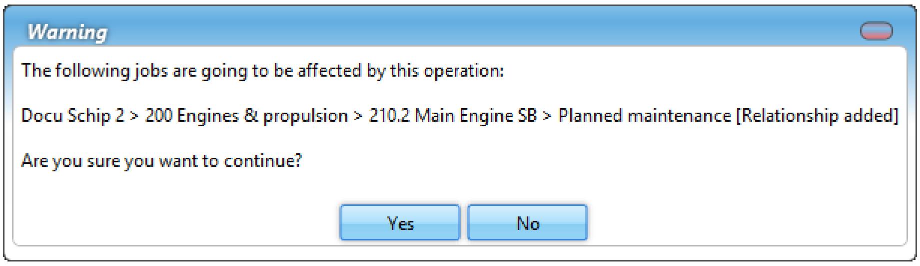
- In the property settings for a machine, **Preferred running hour** must be selected
- All tasks in the job must have an **ID**
- The relationship must be made in the office version

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



4. Click on **Ok**
5. An overview of the selected relationships will appear



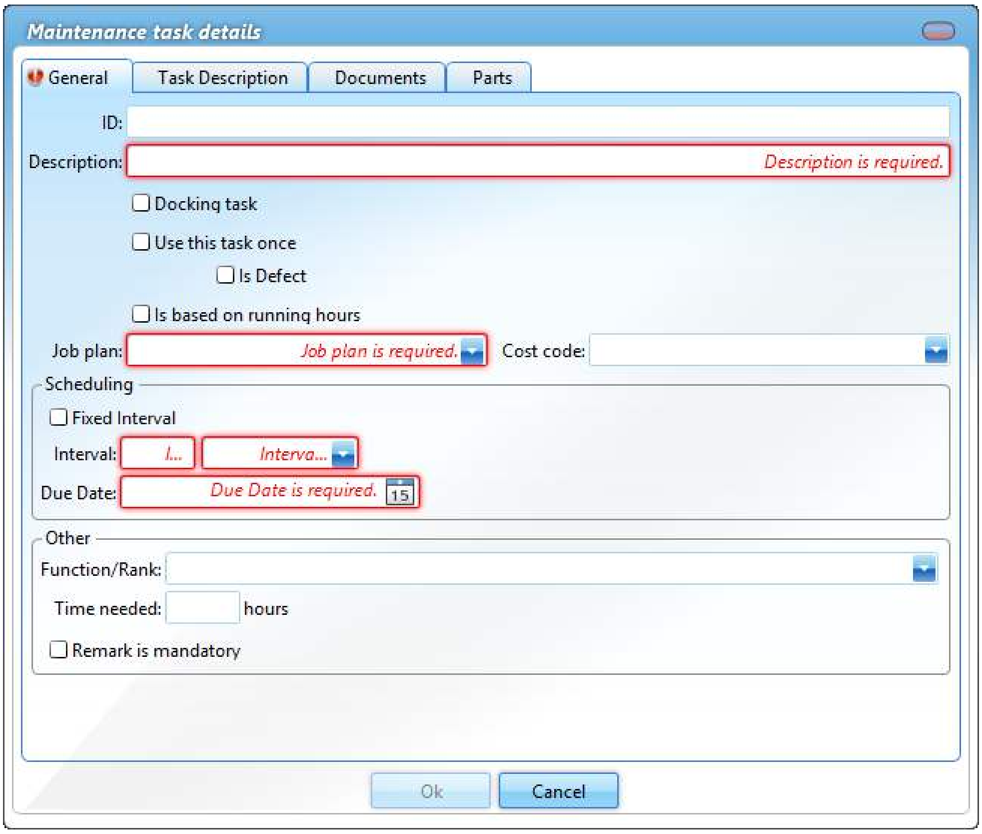
6. Click on **Yes** if the overview displays the right jobs

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

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

6.10 How do I create a maintenance task?

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



2. Enter a short **Description**
3. Select a **job**
4. Select one of the following options:

Time interval (default)

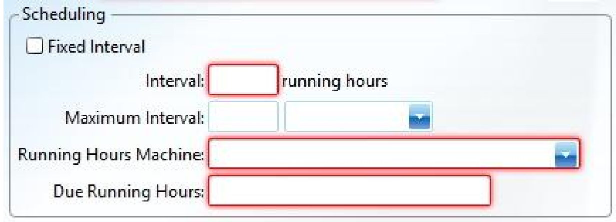
Enter an **Interval** and select day, week or month.

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.

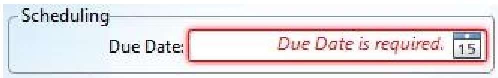
Extra options:

- 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.
Ledger: Select a ledger account. Potential costs are deducted from the budget of the selected account.
Position: Select a rank. Only users with this rank can see the task on the job list.
Duration: Specify how many hours are needed to perform this task.
Remark is mandatory: When you sign off on a maintenance task, the comments field is required.

6.11 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.

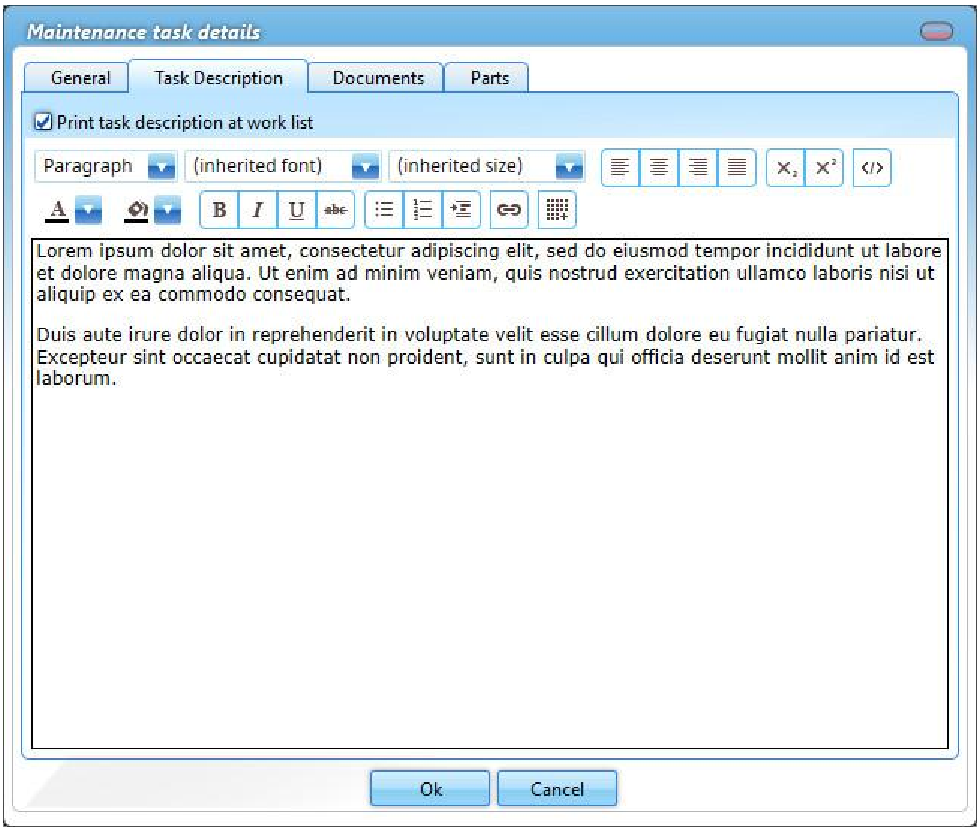
A task or a drill has an interval of one month.

	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.

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

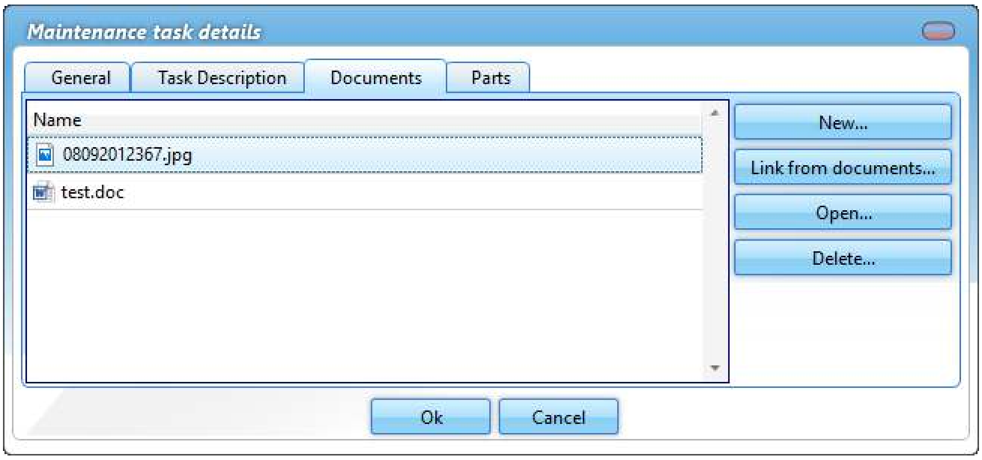
1. Open the task and go to the tab **Task Description**



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

6.13 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



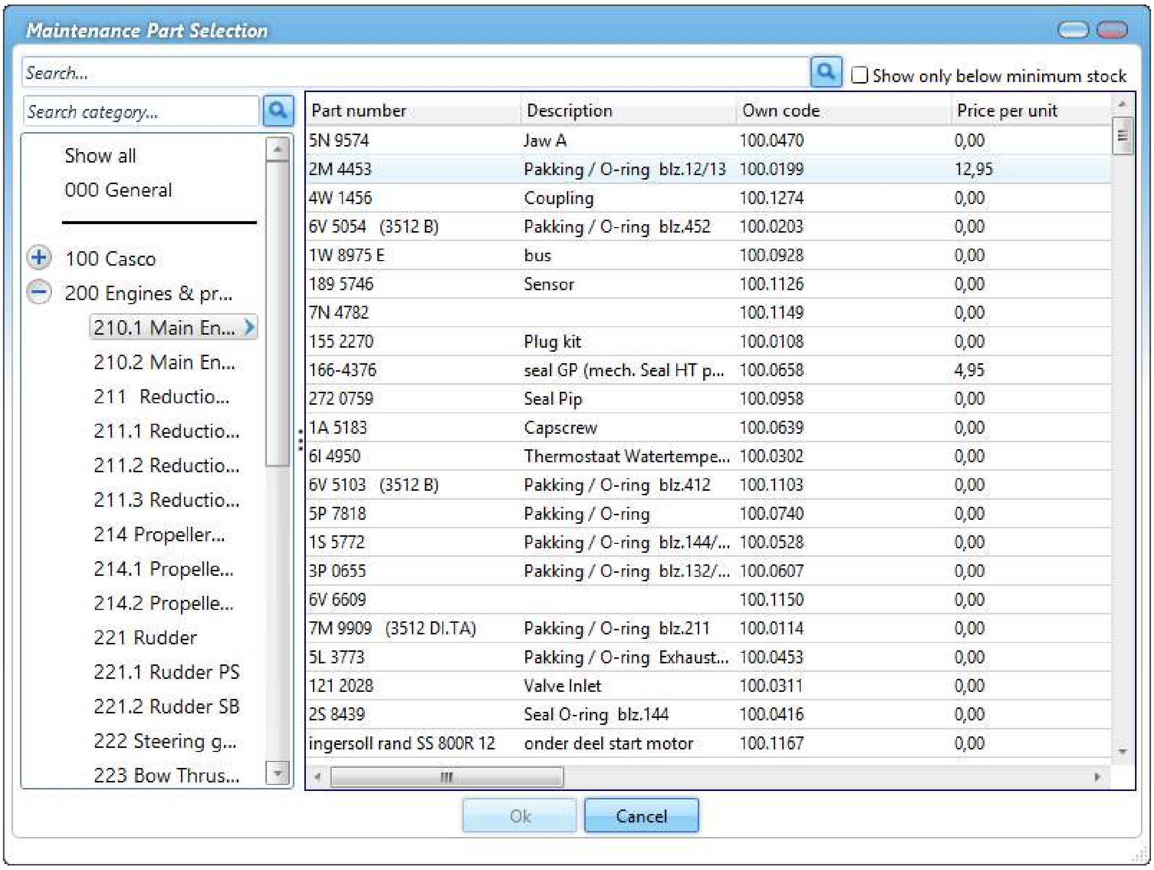
4. Click on **Ok**

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

6.14 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**

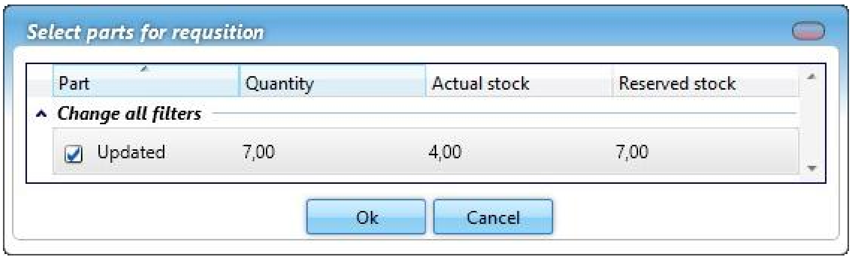
3. Click on **Select Part(s)...**



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

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

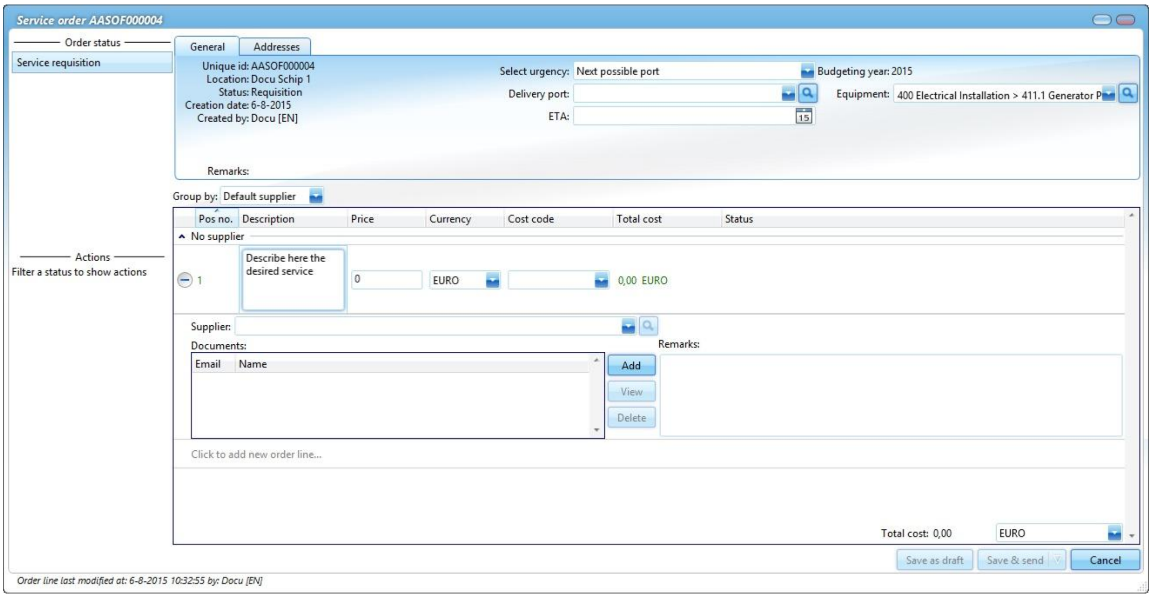
1. Right-click on a task and select **Create requisition...**
2. Select the parts you want to order



3. Click on **Ok**

6.16 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**

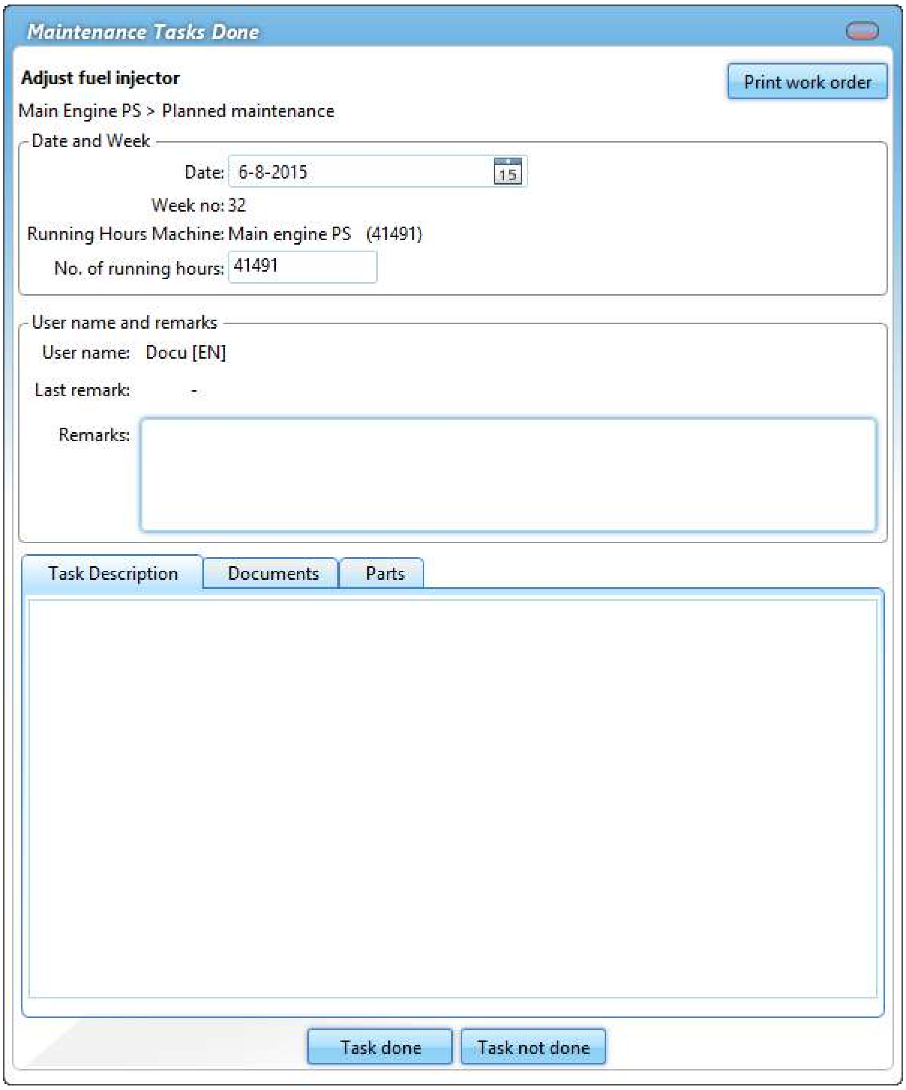
> **Tip:**
> If a defect is registered in the category, this defect will also be included in the service request.

6.17 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**

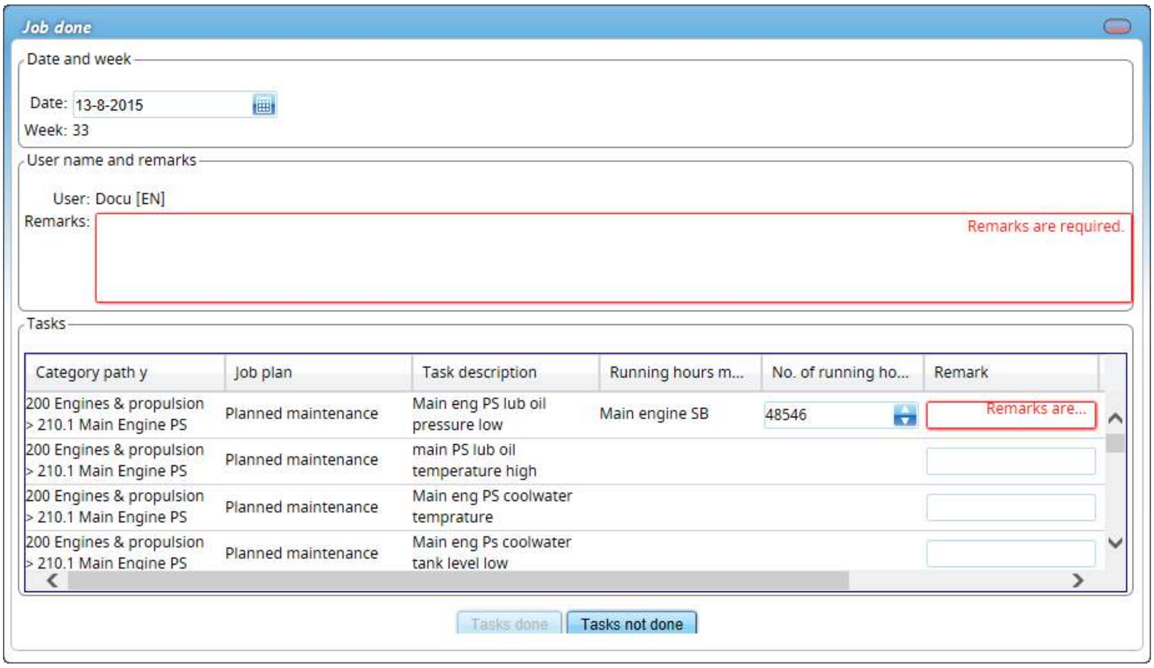
2. Enter a **Remark**



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

Follow the steps below to mark multiple tasks as done:

1. Mark the tasks that are done by selecting these under column ✓ (all tasks with a ✓ will be selected)
2. Click on **Mark selection as done**
3. Enter a **Remark** (in the image below it is required as this is a task with a mandatory comments field)



4. Click on **Tasks done**
5. The tasks will now be removed from the work list and will be re-added at a predetermined interval

6.18 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**

Work order | Mastex Trader

Description: Change oil filter
Rank: Chief engineer
Priority: 90,00%

Mastex Software BV | Mastex Trader | IMO 12345678

Work order

Title: Change oil filter
Category: 200 Engines & propulsion > 210 Main engines > 210.2 Main Engine SB
Job: 250 running hours

Manufacturer: Caterpillar
Type: 3512B
Serial number: 4TN00588
Motor number: 123456798

Planned start: 96659 hours
Downtime: 1 hours
Interval: 250 days
Last done: 6-3-2018

Work description

1. **Remove** each oil filter with a 1U-8760 ChainWrench.

2. **Clean** the sealing surface of the mounting base. Ensure that all of the old gasket is removed. Caterpillar oil filters are built to Caterpillar specifications. Use of an oil filter not recommended by Caterpillar could result in severe engine damage tothe engine bearings, crankshaft, etc., as a result ofthe larger waste particles from unfiltered oil enteringthe engine lubricating system. Only use oil filtersrecommended by Caterpillar.

3. **Apply** clean engine oil to the gasket of the new oil filter. Do not fill the oil filters with oil before installing them. This oil would not be filtered and could be contaminat- ed. Contaminated oil can cause accelerated wear to engine *components*.

Own code	Part number	Description	Quantity	Used
100.0953	LF 3376	Oil Filter	1,00 pcs	

Date job done:
Actual run time:
Job performed:
Spare parts:
Notes:

14-3-2018
121.058 v4.2
Page 1 of 1
MXSuite 2.10.6.0

6.19 How do I see the history of a task?

1. Go to the module **History**
2. Click on **Search**
3. Use the filters to add the history of the corresponding task to the overview

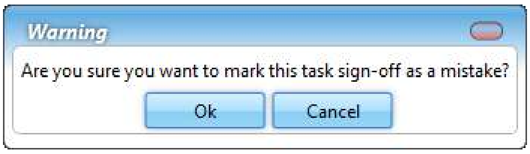
Tip:

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.

6.20 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



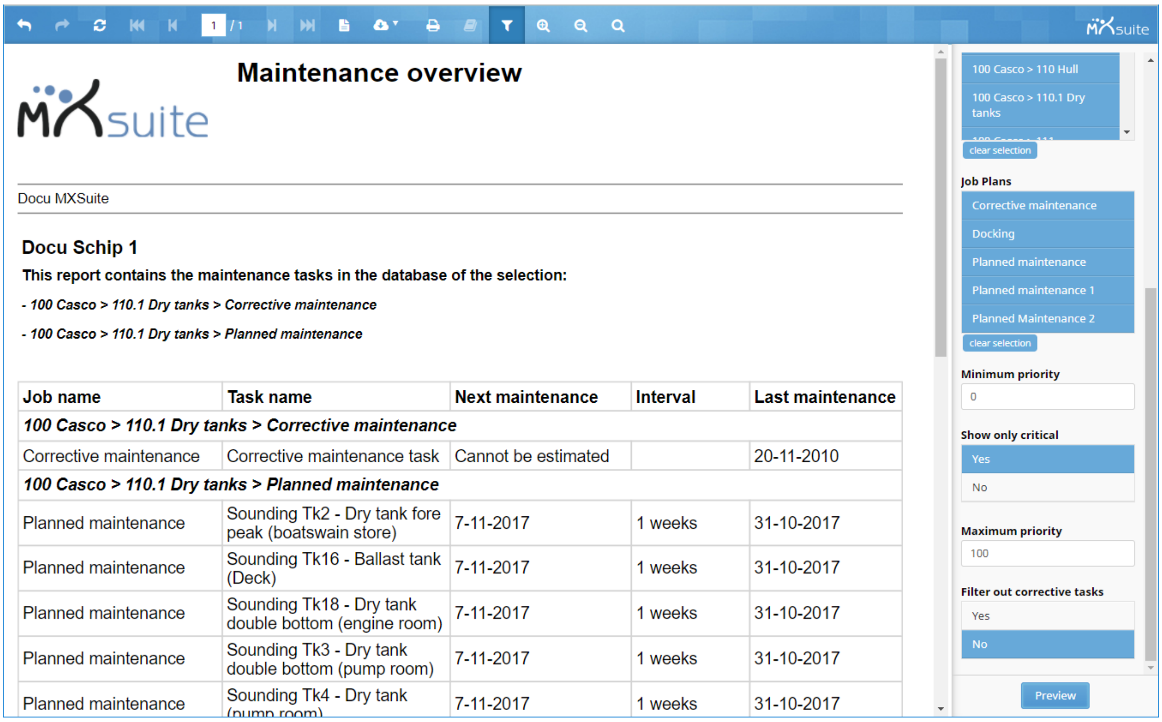
5. Click on **Ok**

Note:

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

6.21 How do I create an overview of all critical tasks?

1. Go to the module **Reports**
2. In the left column, select **Maintenance**
3. Double-click on **Maintenance overview.** The overview will be opened in the standard browser. On the right side of the screen you can select the tasks to be displayed
4. Select the **location** in the **Locations** filter
5. Select all **equipment**. Simply delete the current selection by clicking on the **Clear selection** and then choose **Select all**
6. Select all **job plans**. Simply delete the current selection by clicking on the **Clear selection** and then choose **Select all**
7. Under **Show only critical**, click **Yes**
8. Click on **Preview** to generate an overview of all tasks

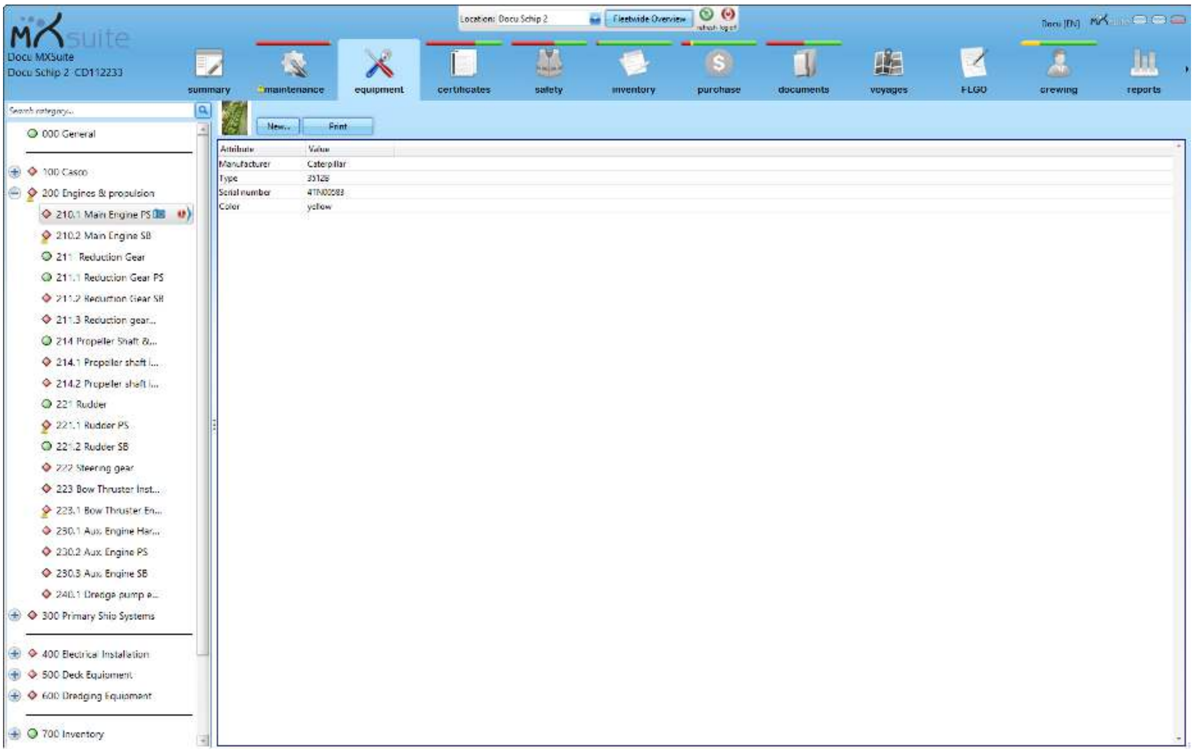


6.22 How do I add a document to a completed maintenance task?

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.

7 Equipment



The module Equipment 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. Click on **New...**
3. Complete all required fields

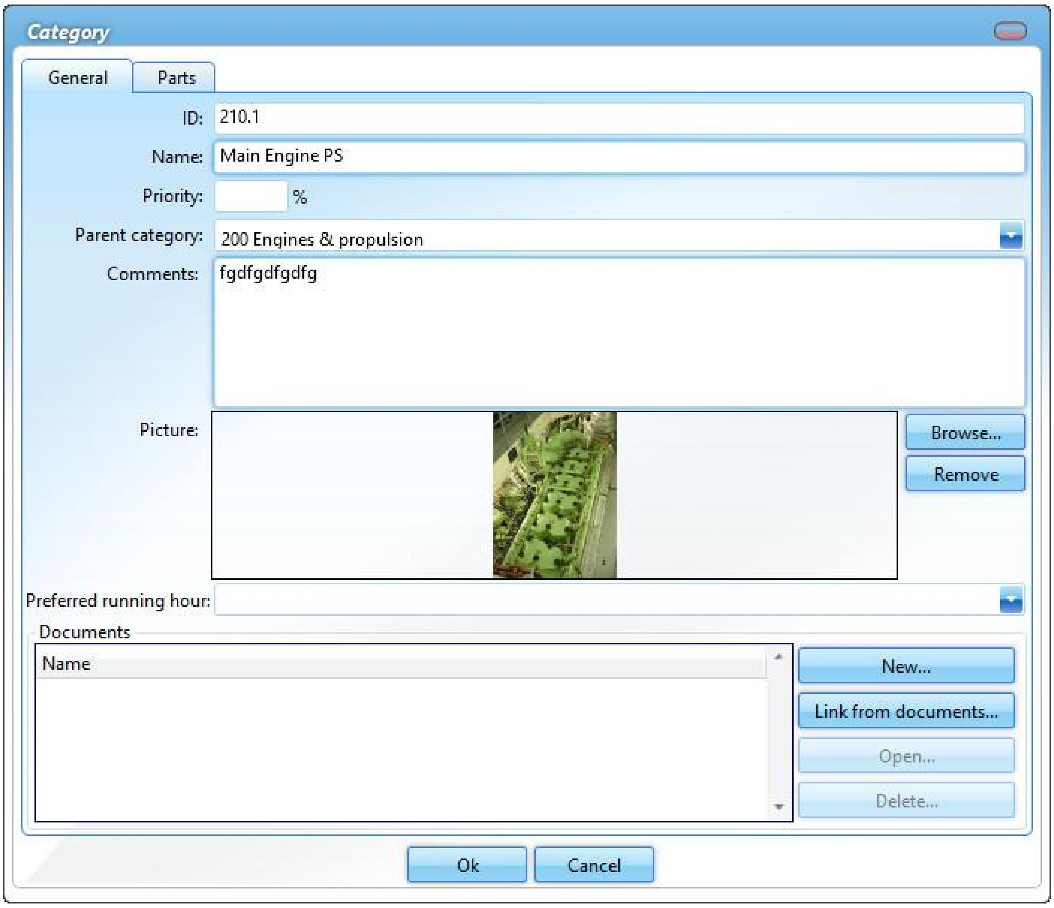
4. Click on **Ok**

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?

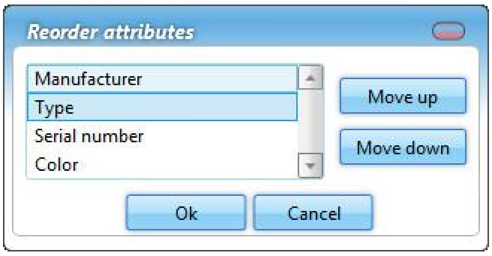
1. Right-click on a category and select **Edit category...**
2. Click on **Browse...**



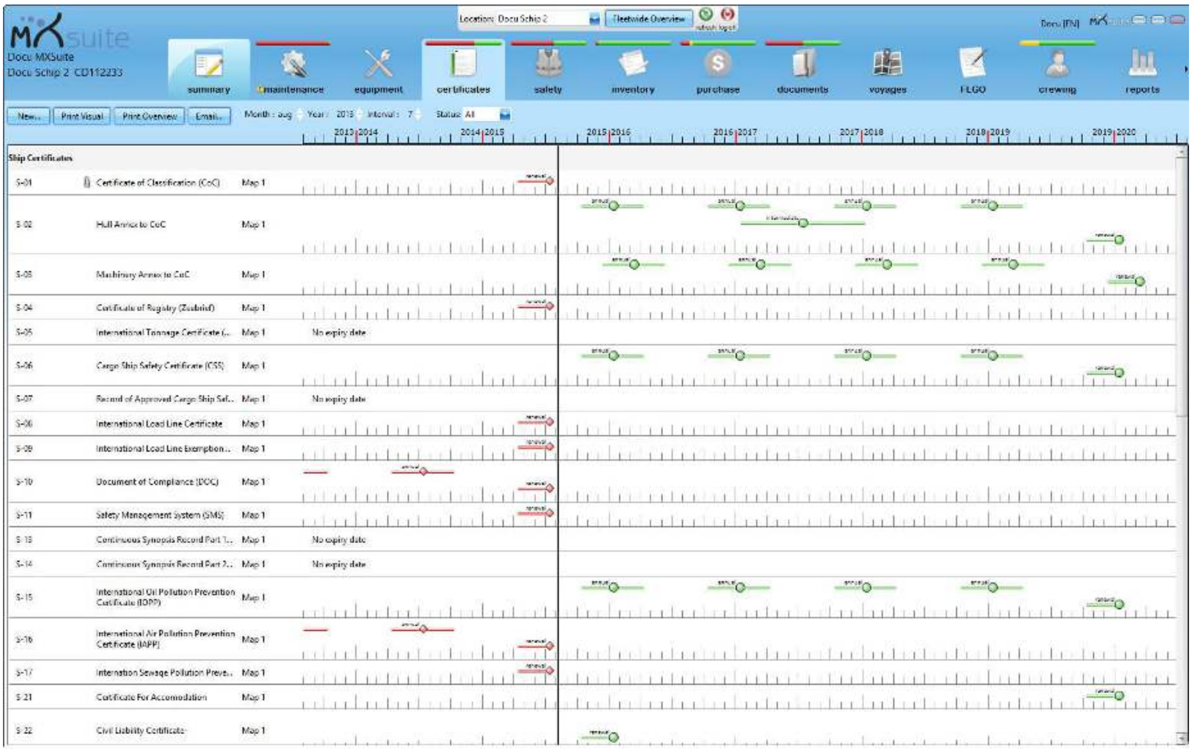
3. Select the image
   Permitted image formats are: .BMP .DIB .RLE .JPG .JPEG .JPE .JFIF .GIF .TIF .TIFF .PNG
4. Click on **Ok**

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**

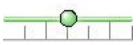
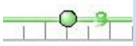
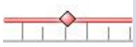
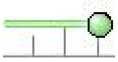
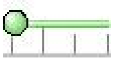


8 Certificates



The expiration date of certificates can be monitored and managed in the module Certificates. Certificates are subdivided into groups. The group name is displayed above the first certificate in the group.

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.
	The line to the right of a symbol indicates the window period after the survey or certificate renewal has been completed. The length of the line indicates the number of months in this period.
	This certificate has expired and the due date is not in the current view.

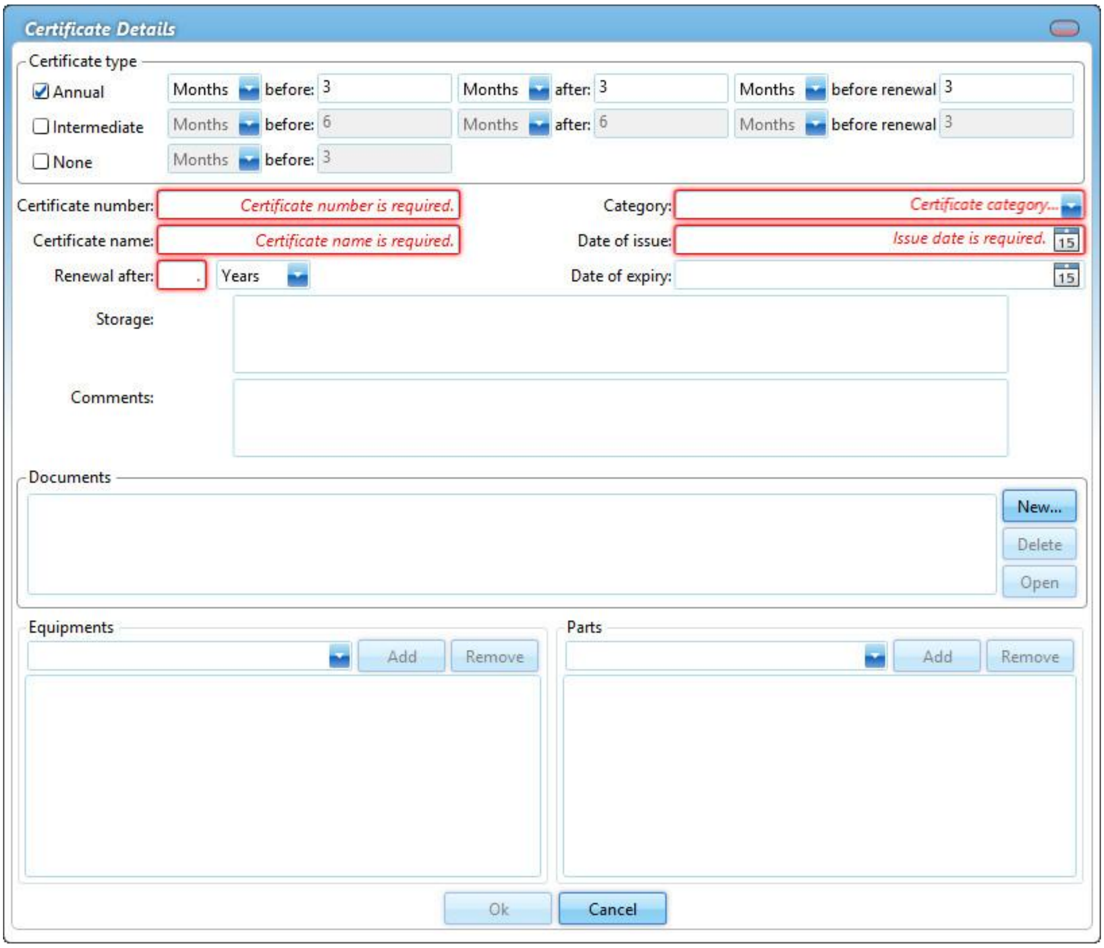
8.2 How do I create a new certificate category?

1. Right-click on a certificate and select **Edit**
2. Type the name of the category in the **Category** field
3. Click on **Ok**

The new category can be selected when creating a new certificate or editing an existing certificate.

8.3 How do I create a new certificate?

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



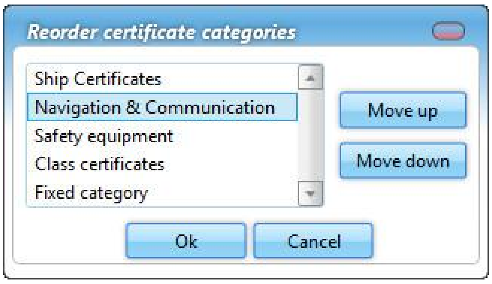
- **Annual**: A survey will be planned annually for this certificate
- **Intermediate**: A survey will be planned for some time between the date of issue and the date of expiry
- **None**: Use this type when no intermediate surveys are required
- **Docking**: This type is used to plan dockings, after 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 **Ok**

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.

8.4 How do I reorder categories?

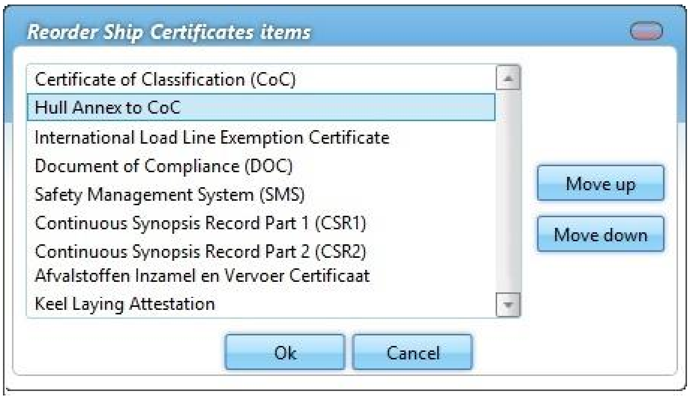
1. Right-click on a **Category** and select **Reorder certificate categories...**
2. Select a category and use **Move up** and **Move down** to change the order



3. Click on **Ok**

8.5 How do I reorder certificates?

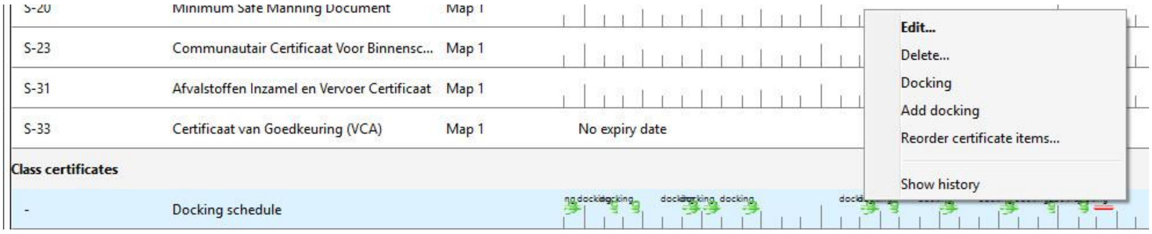
1. Right-click on a **Certificate** and select the option **Reorder certificate items...**
2. Select a certificate and use **Move up** and **Move down** to change the order



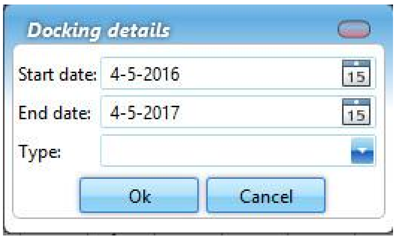
3. Click on **Ok**

8.6 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**



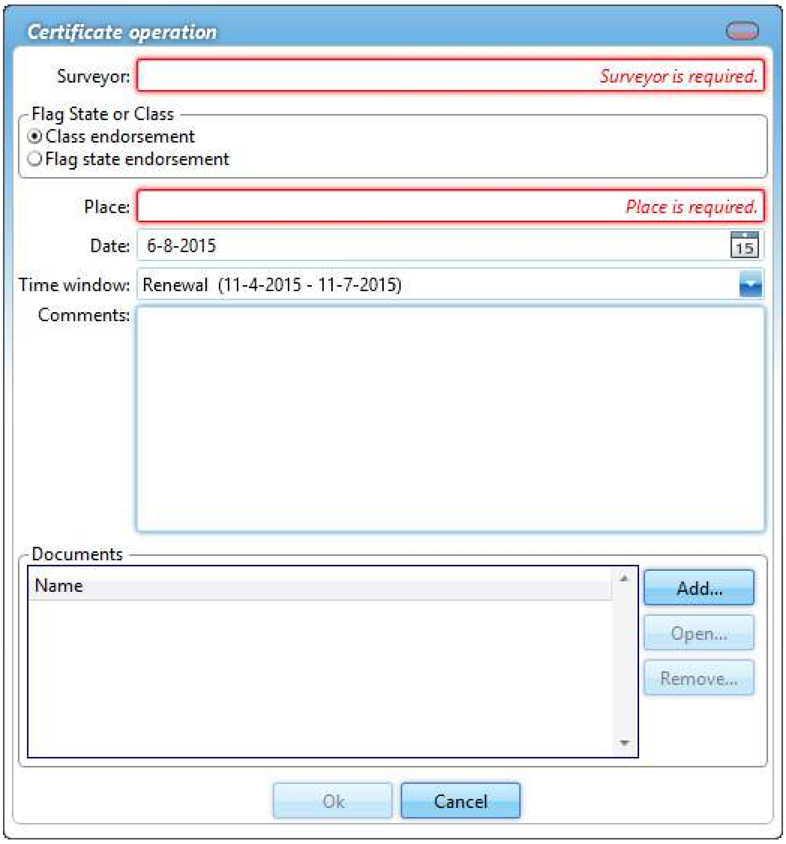
3. You can also select **Intermediate** or **Special** under Type
4. Click on **Ok**

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

8.7 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 **Ok**

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.

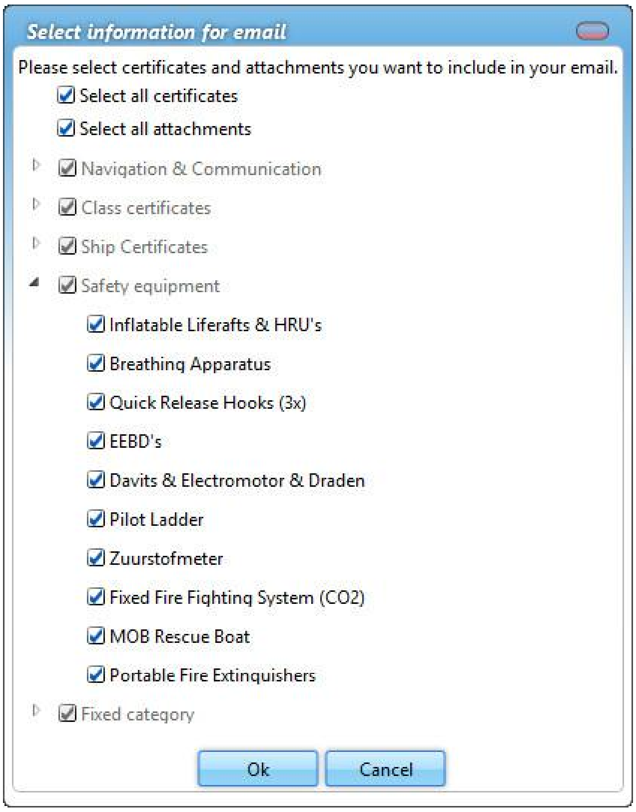
8.8 How do I copy all certificates?

1. Go to **Settings**
2. Click on **Communication**
3. Click on **Copy data**
4. Select **Certificates** and click on **Ok**
5. Select the destination
6. Click on **Ok**

Note:
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

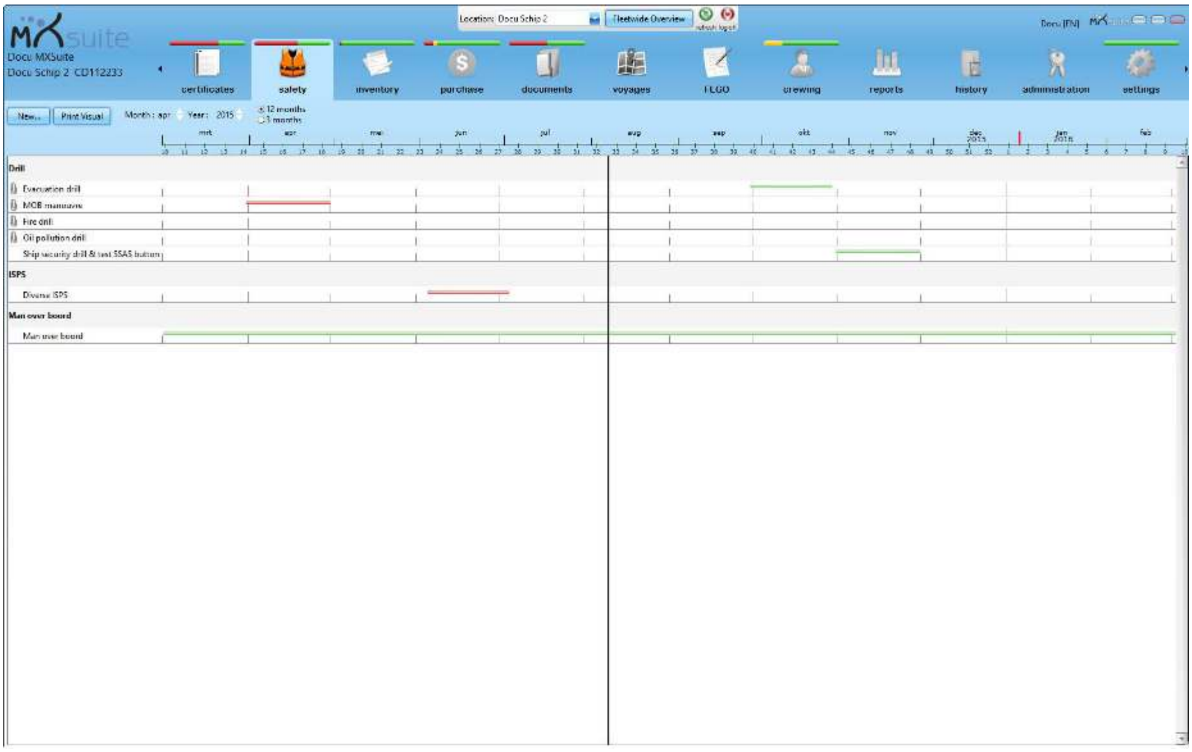
8.9 How do I email certificates?

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 **Ok**

9 Safety



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

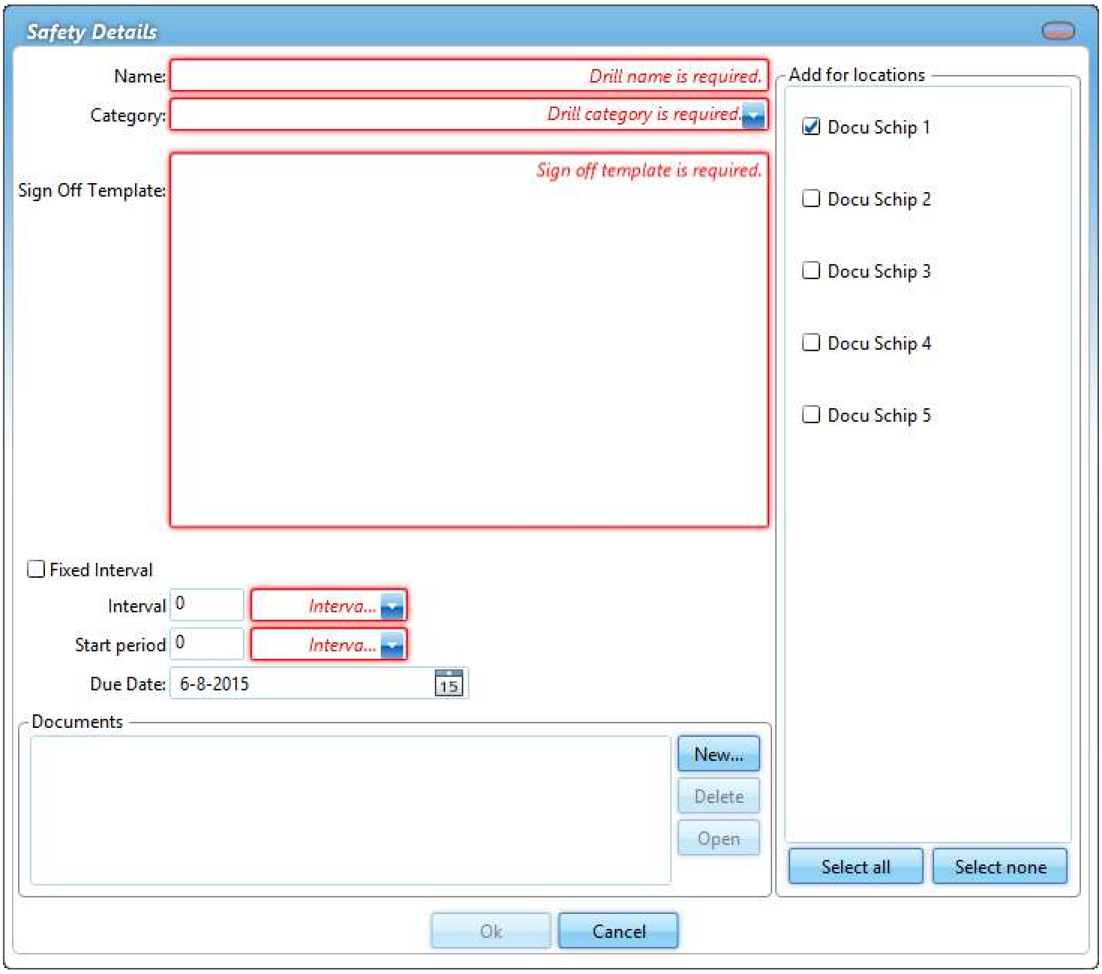
9.1 How do I create a new category?

1. Right-click on a drill and select **Edit...**
2. In the **Category** field, enter the name of the new category
3. Click on **Ok** to save the new category

A new category can also be created when creating a new drill.
When a new drill is created later or when an existing drill is changed, you can select the new category from the list of categories.

9.2 How do I add a new drill?

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

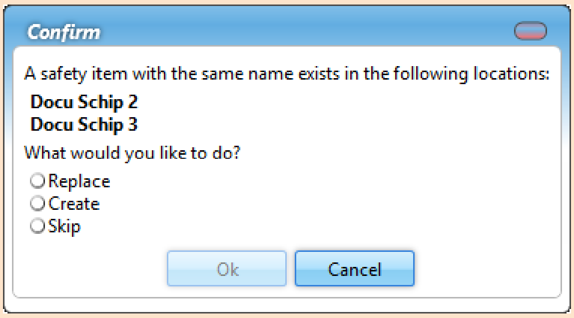


The **Start period** is the timeframe in which the drill must be completed. During this period the drill will be orange

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

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

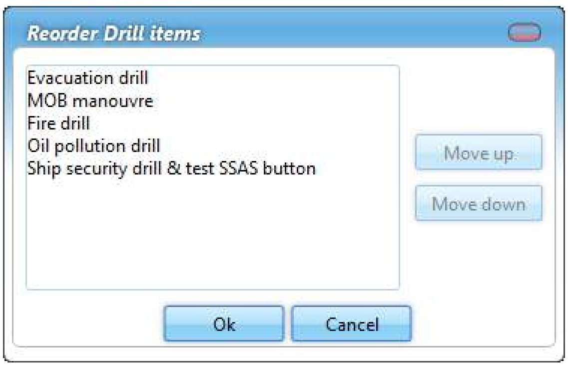
The following table clarifies what this option does.
A task or a drill has an interval of one month.

	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.

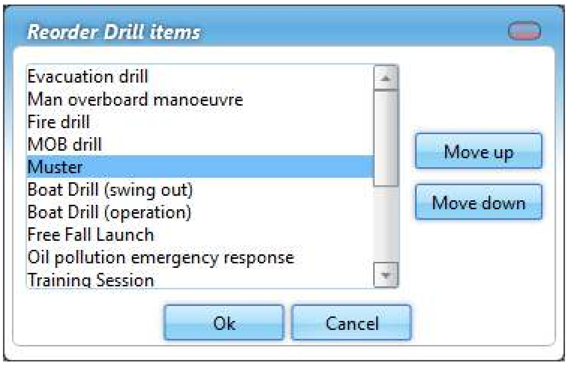
9.4 How do I reorder categories?

1. Right-click on a **category** and select **Reorder safety items...**
2. Select a category and use **Move up** and **Move down** to change the order
3. Click on **Ok**



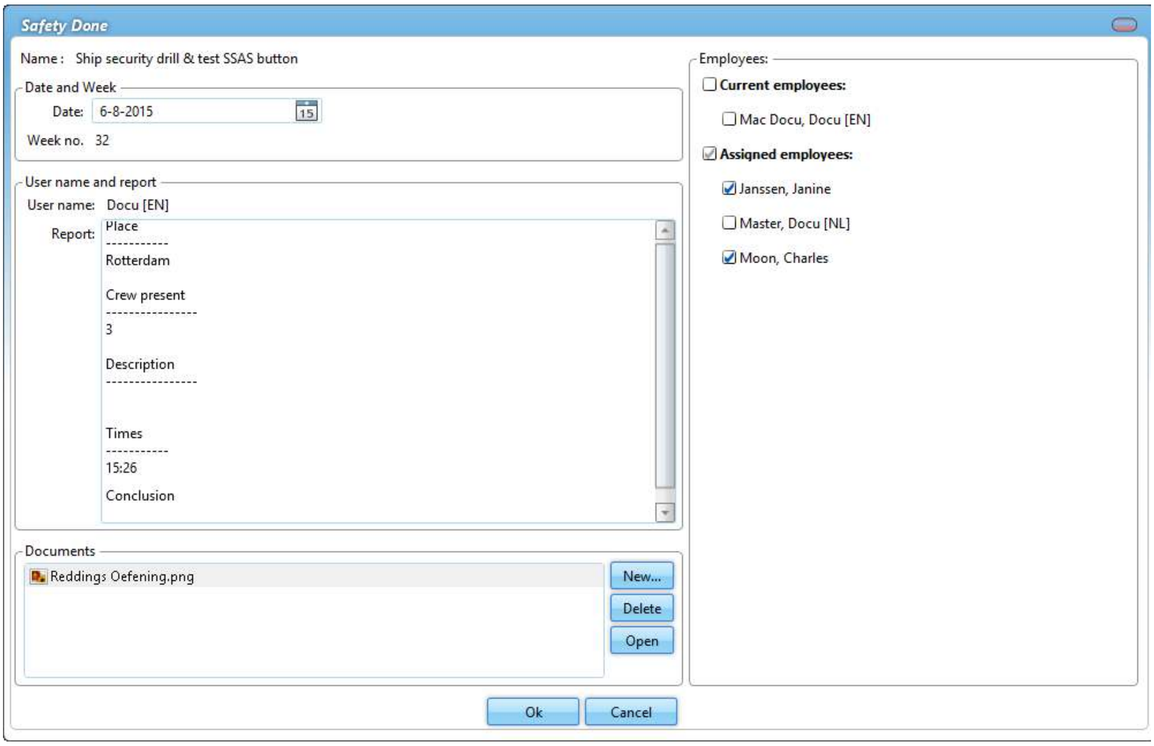
9.5 How do I change the ordering of the drills?

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 **Ok**



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 **Done...**
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 **Ok**

9.7 How do I copy drills to another ship?

It is possible to copy all drills from one ship to another.

1. Make sure to select the location you wish to copy from
2. Go to **Settings**
3. Click on **Communication**
4. Click on **Copy data**
5. Select **Safety**
6. Click on **Ok**
7. Select the location you want to copy to
8. Click on **Ok**

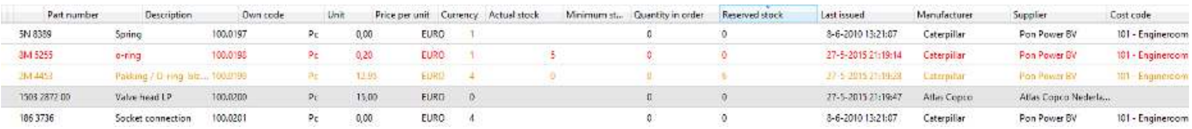
10 Inventory

All parts can be registered in the module Inventory. 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 categorisation ensures that parts are stored in an orderly fashion.

10.1 What do the colours in the overview mean?

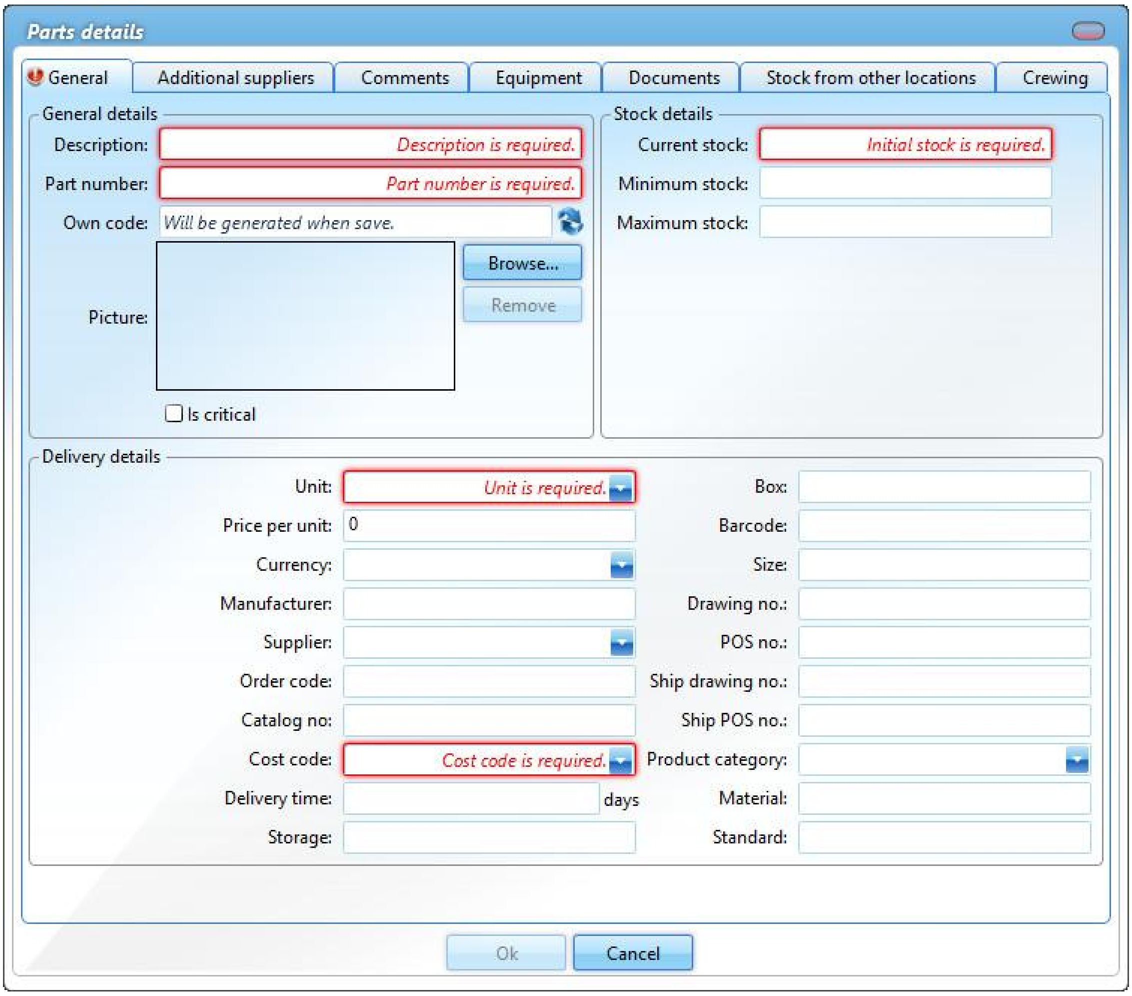
The following colours are used in the overview:

- red: actual stock is less than the minimum stock requirements
- orange: actual stock is not sufficient for executing a maintenance task
- grey background: the part is not linked to a selected location



10.2 How do I add a part?

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



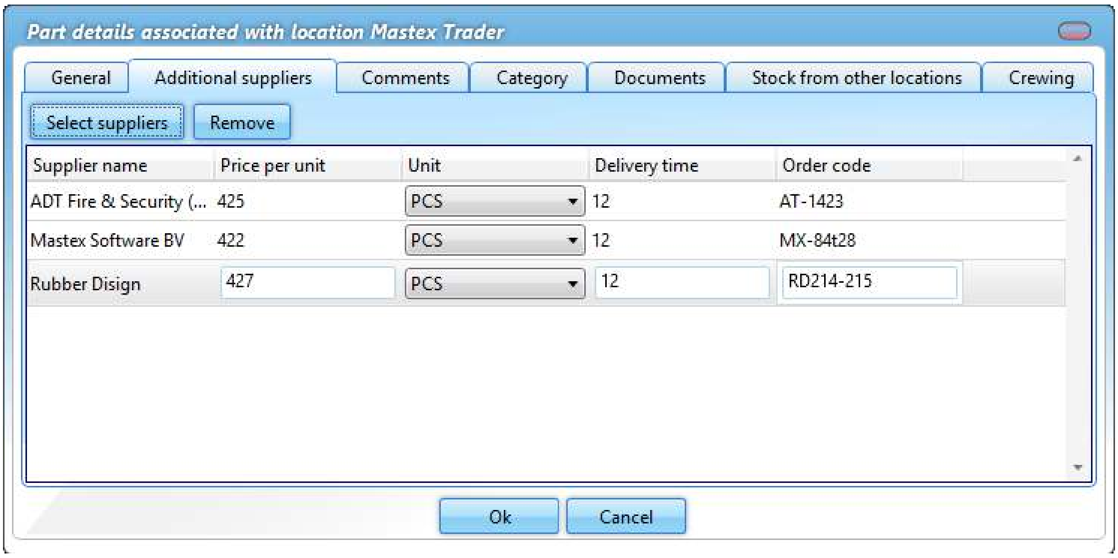
3. Click on **Ok**

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.

10.3 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, etc.



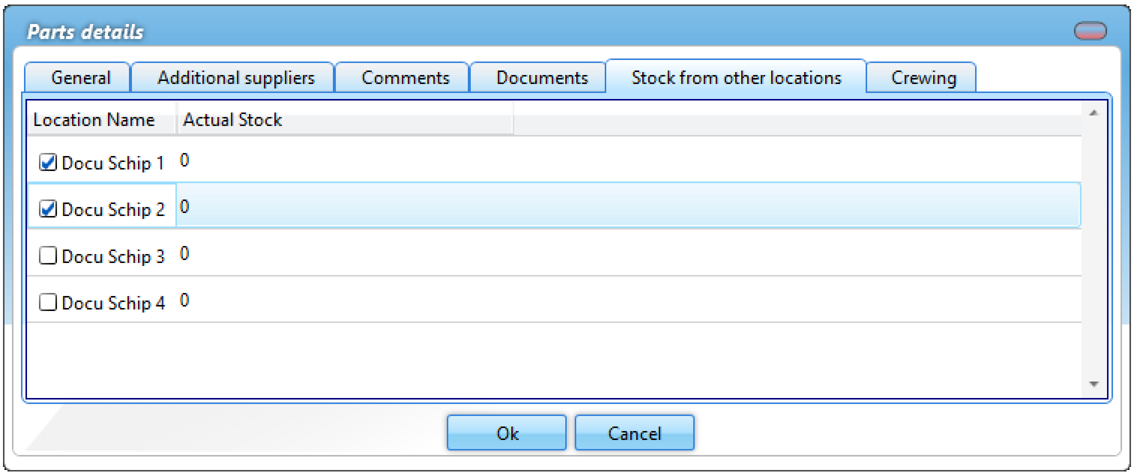
5. Click on **Ok**

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

10.4 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

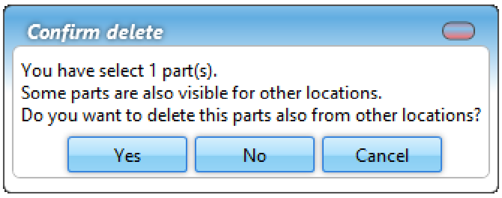


4. Click on **Ok**

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

10.5 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



10.6 How do I adjust the stock?

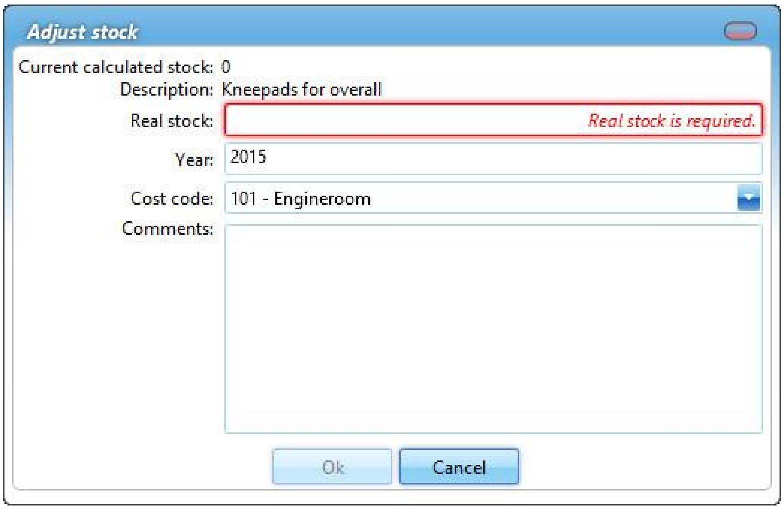
The stock is automatically adjusted when:

- 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...**

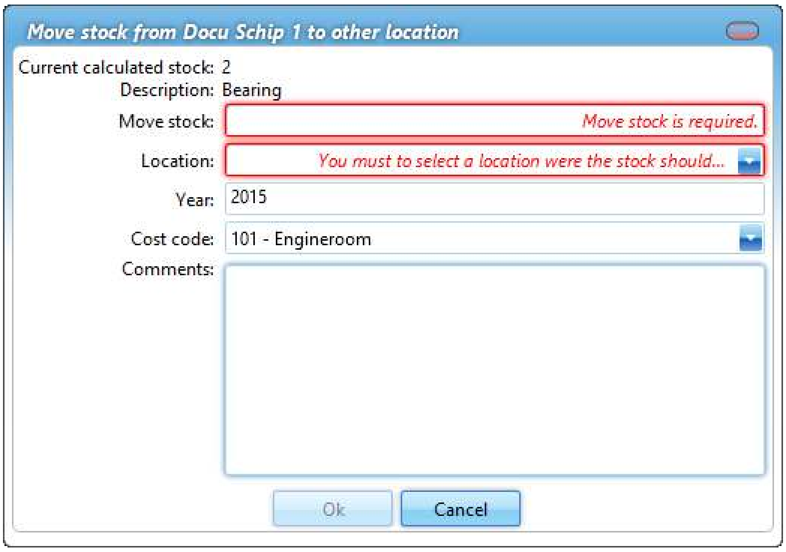
2. Enter the **Real stock**



3. Click on **Ok**

10.7 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 **Ok**

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.

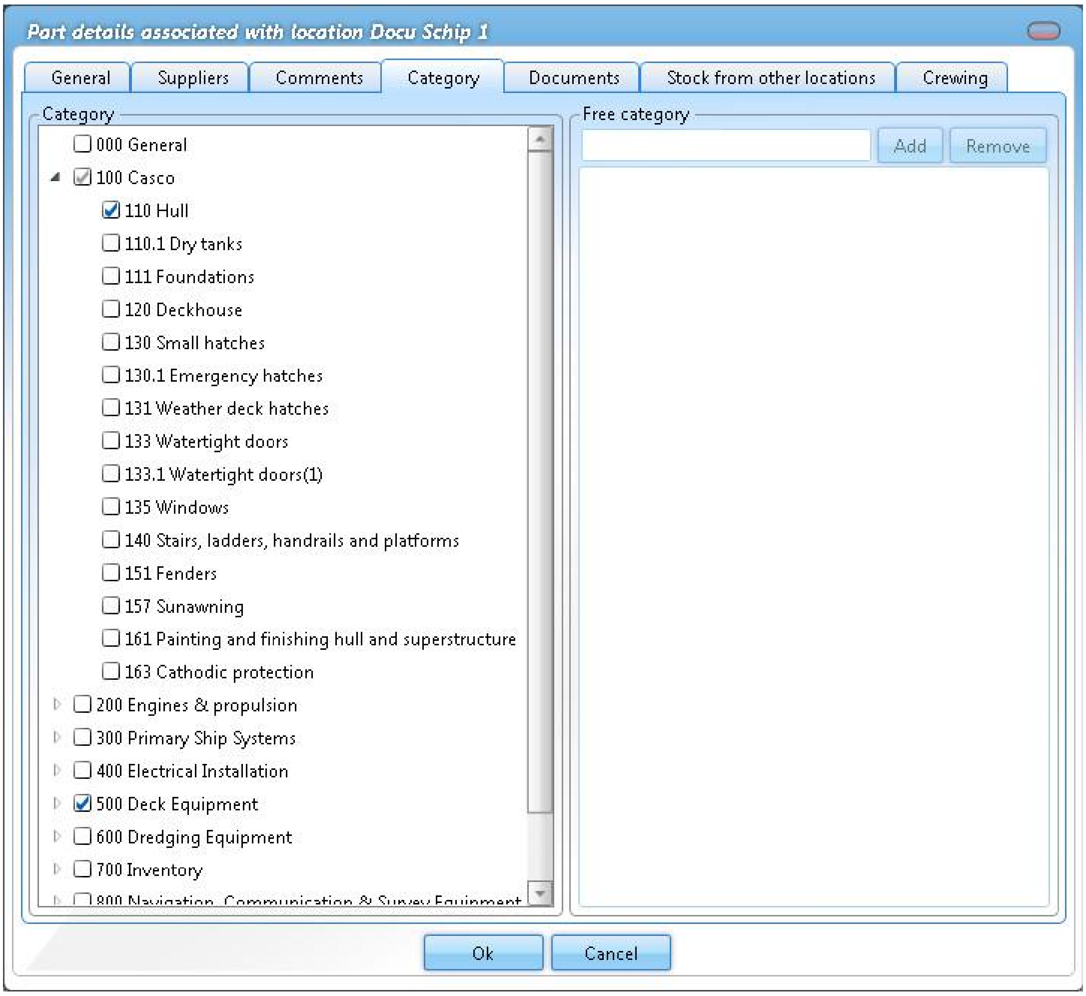
10.8 How do I see the history of a part?

1. Go to the module **History**
2. Select **Inventory**
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.

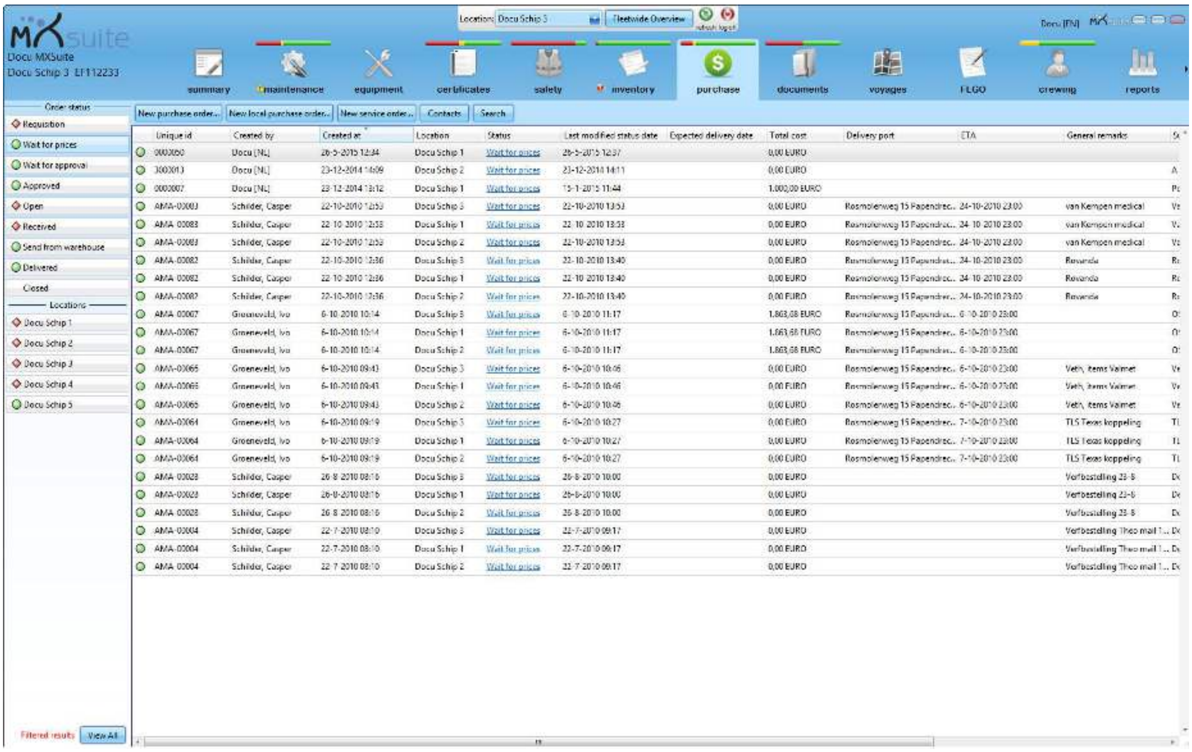
10.9 How do I link an article to a category?

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



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

11 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.

11.1 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.

11.2 How do I create a purchase order?

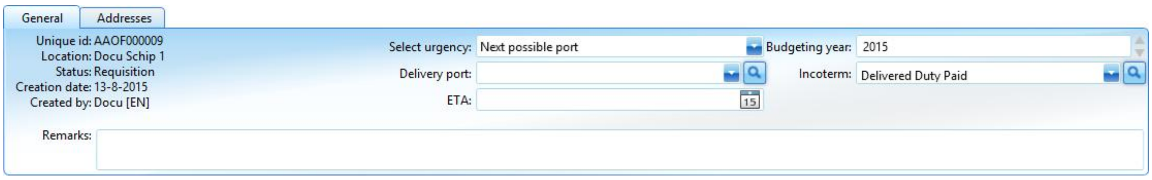
1. Click on **New purchase order...**
2. Enter a search term in the column **own code** and click on to open the list of parts
3. Select one or more parts and click on **Ok**
4. The selected parts will be added to the order
5. Order lines can be automatically added to an order by clicking on **Insert 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

11.3 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

11.4 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

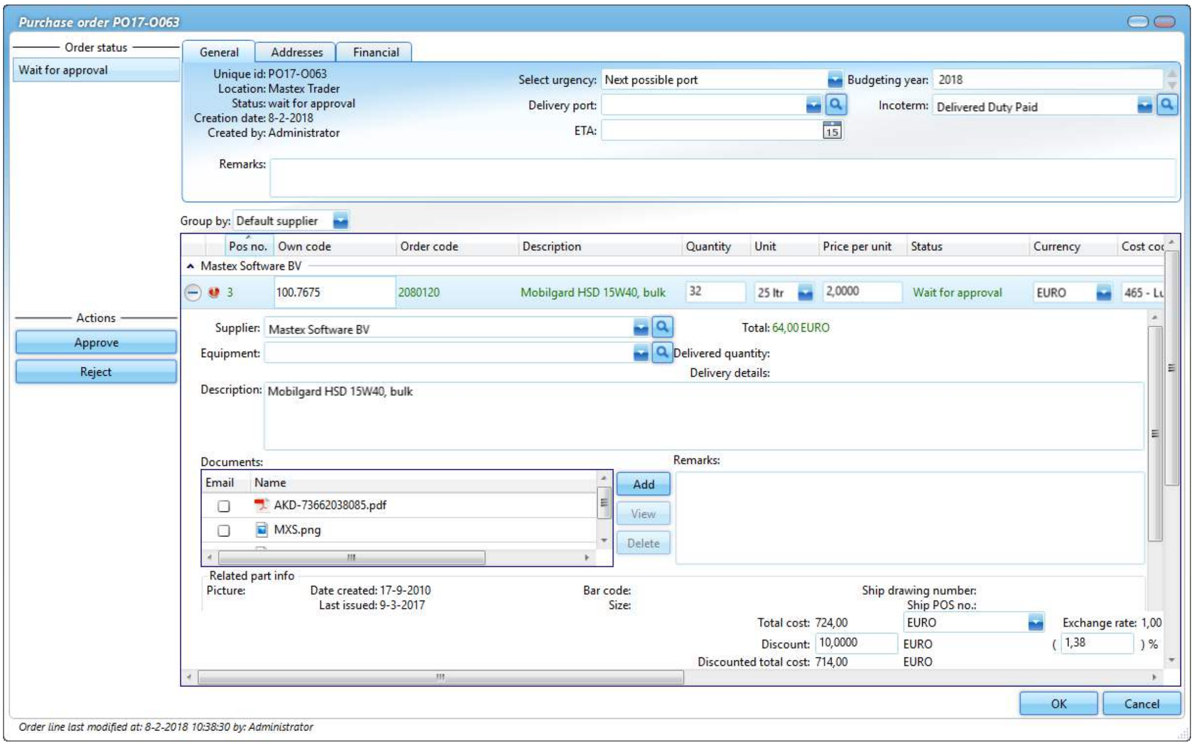


3. Clearly indicate the necessary service in the order line
4. Click on **Save & send** to save the order and to forward it for further processing. Click on **Save as draft** to edit the order or to send it at a later date

11.5 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 **Add** in Documents

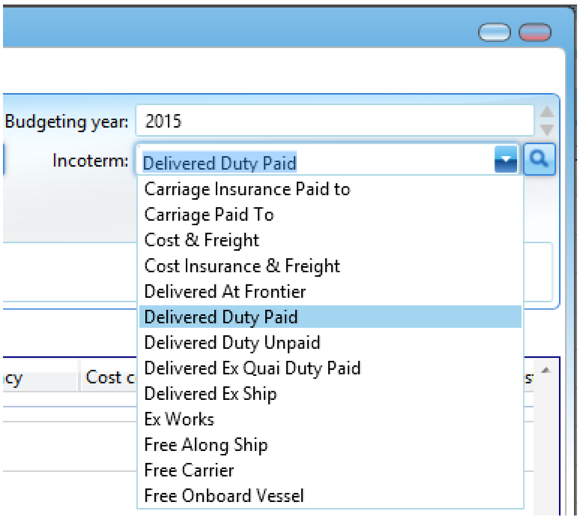


> **Tip:**
> If the option **Email** is selected, the document will be included when the order will be emailed to the supplier.

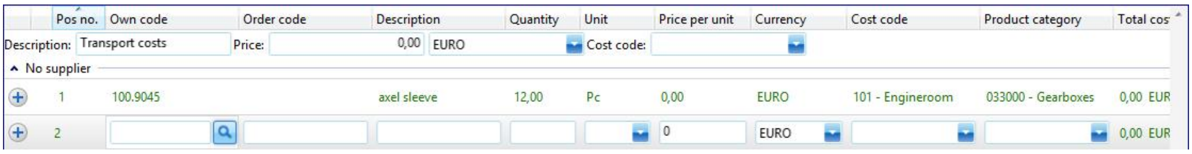
11.6 How do I use Incoterms in my order?

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.

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

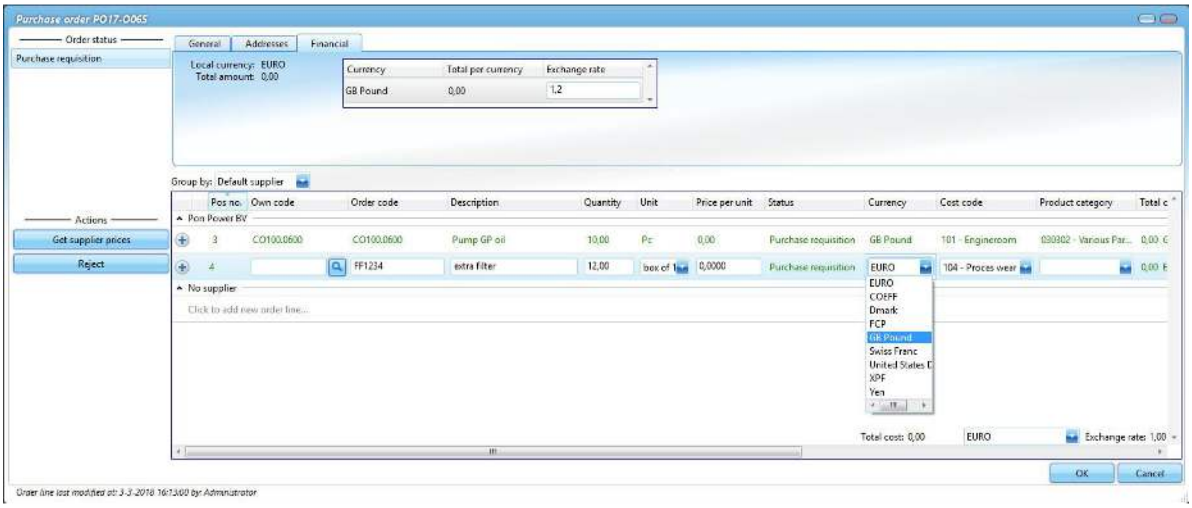
1. Open a purchase order
2. Right-click on an order line and select **Set expected delivery date...**
3. Select a date

4. Click **Ok**

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

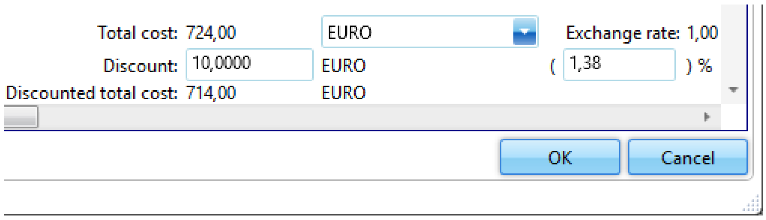
11.8 How do I change the exchange rate in an order?

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



11.9 How do I enter the discount for an order?

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



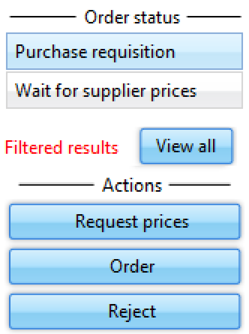
3. Click on **Ok**

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.

11.10 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.

11.11 How can I check the status of my order?

There are two 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:

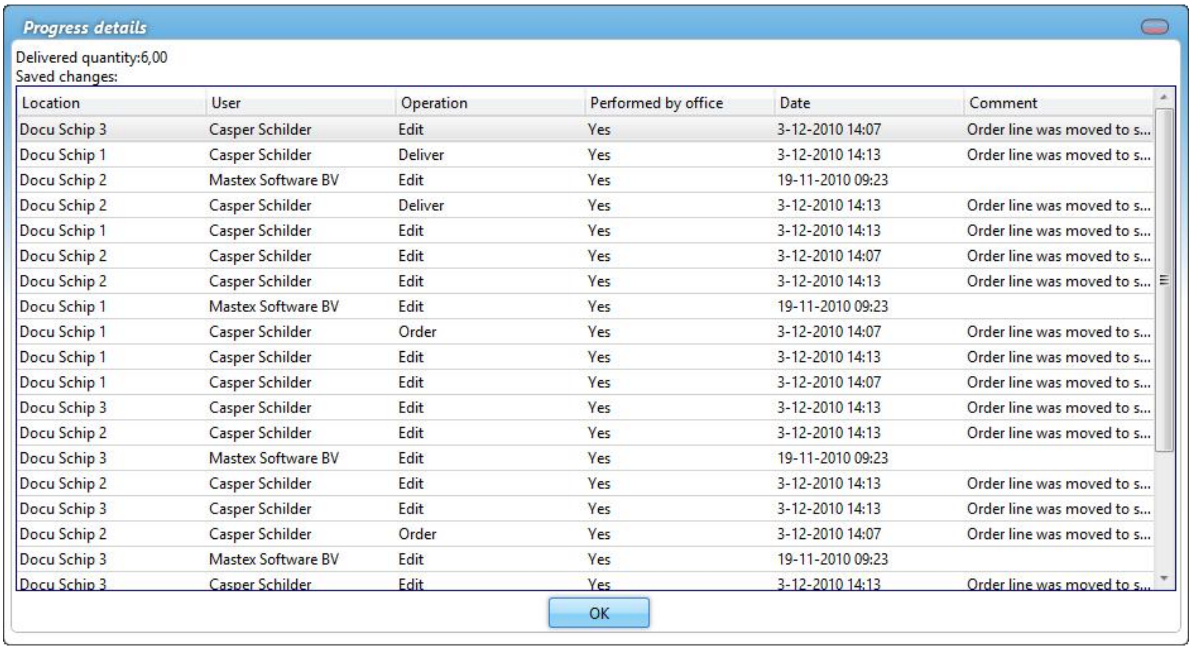
- Pending supplier prices
- Pending approval
- Approved
- Ordered

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.

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

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


Progress details
Delivered quantity:6,00
Saved changes:

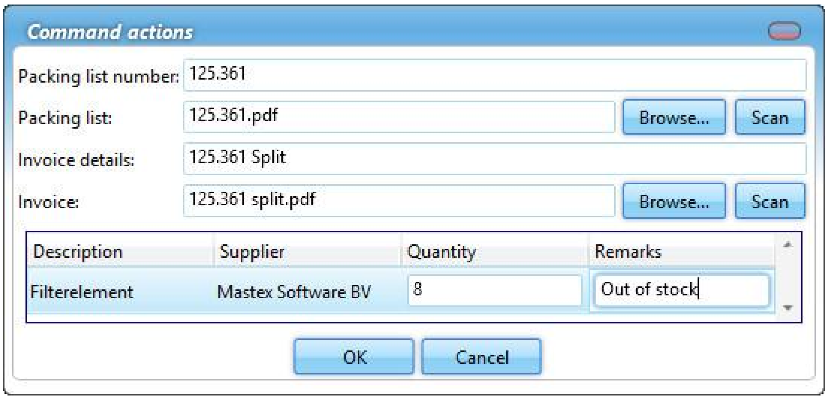
Location	User	Operation	Performed by office	Date	Comment
Docu Schip 3	Casper Schilder	Edit	Yes	3-12-2010 14:07	Order line was moved to s...
Docu Schip 1	Casper Schilder	Deliver	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 2	Mastex Software BV	Edit	Yes	19-11-2010 09:23	
Docu Schip 2	Casper Schilder	Deliver	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 1	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 2	Casper Schilder	Edit	Yes	3-12-2010 14:07	Order line was moved to s...
Docu Schip 2	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 1	Mastex Software BV	Edit	Yes	19-11-2010 09:23	
Docu Schip 1	Casper Schilder	Order	Yes	3-12-2010 14:07	Order line was moved to s...
Docu Schip 1	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 1	Casper Schilder	Edit	Yes	3-12-2010 14:07	Order line was moved to s...
Docu Schip 3	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 2	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 3	Mastex Software BV	Edit	Yes	19-11-2010 09:23	
Docu Schip 2	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 3	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...
Docu Schip 2	Casper Schilder	Order	Yes	3-12-2010 14:07	Order line was moved to s...
Docu Schip 3	Mastex Software BV	Edit	Yes	19-11-2010 09:23	
Docu Schip 3	Casper Schilder	Edit	Yes	3-12-2010 14:13	Order line was moved to s...

OK

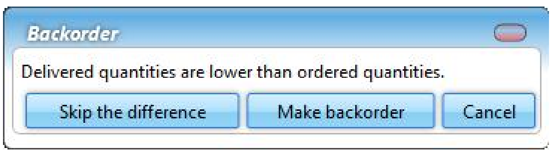
11.13 How do I create a backorder?

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.

11.14 How do I use the search function?

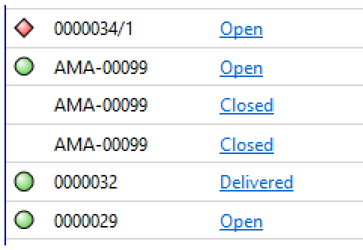
Click on **Search** to open the search window.

Important:
When the search screen is closed, the search filter stays active.

Note:
When the list with orders is filtered by status or location, the search will only be performed within those parameters.

11.15 How do I see closed orders?

1. Click on **Search** to open the search screen
2. Select the option **Include closed orders**
3. You will now see closed orders in the order overview

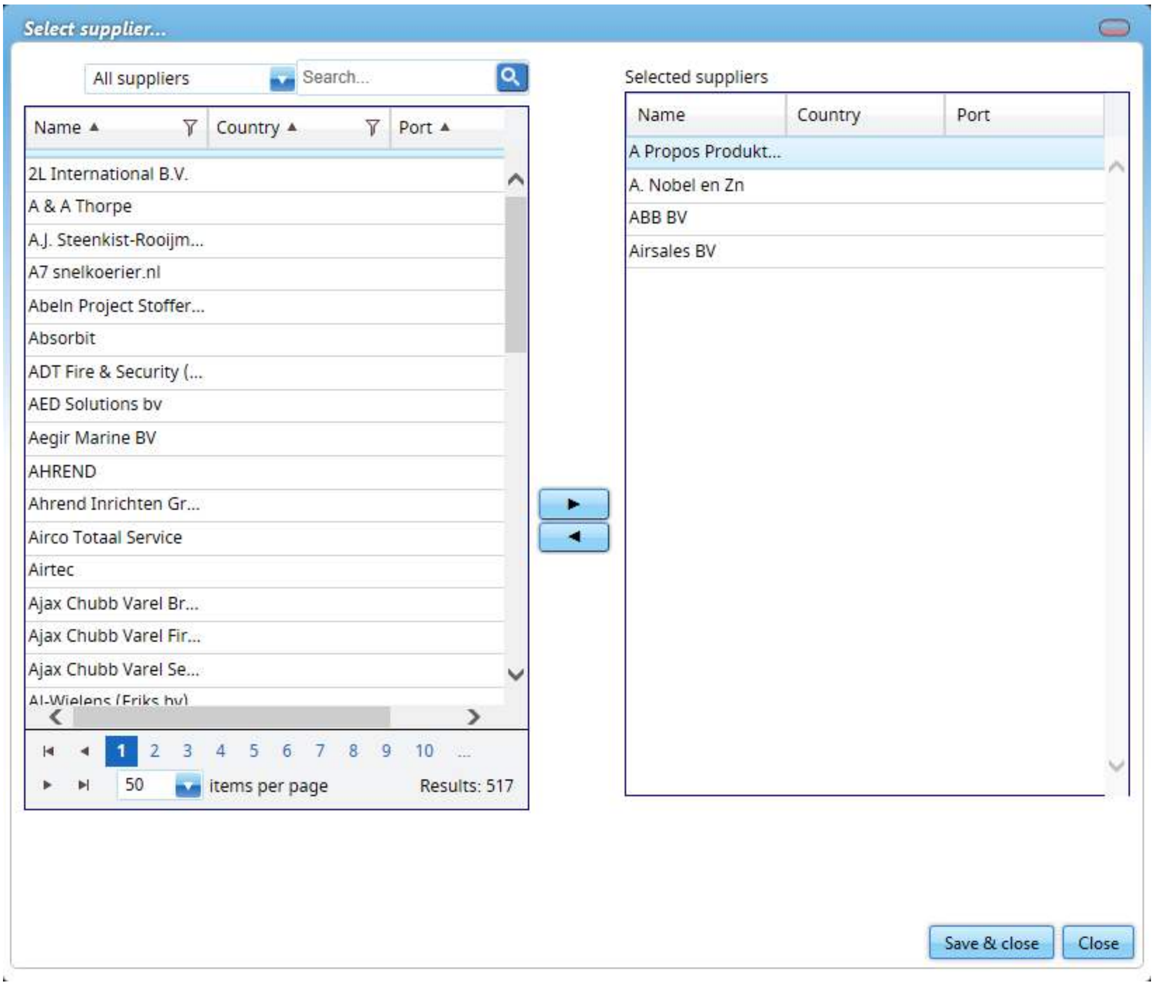


Closed orders can be identified by the lack of an icon.
The status of the order also makes it clear that it has been closed.

Tip:
Select the order status **Closed** to see only the closed orders. This status is only visible if the closed orders are included in the overview.

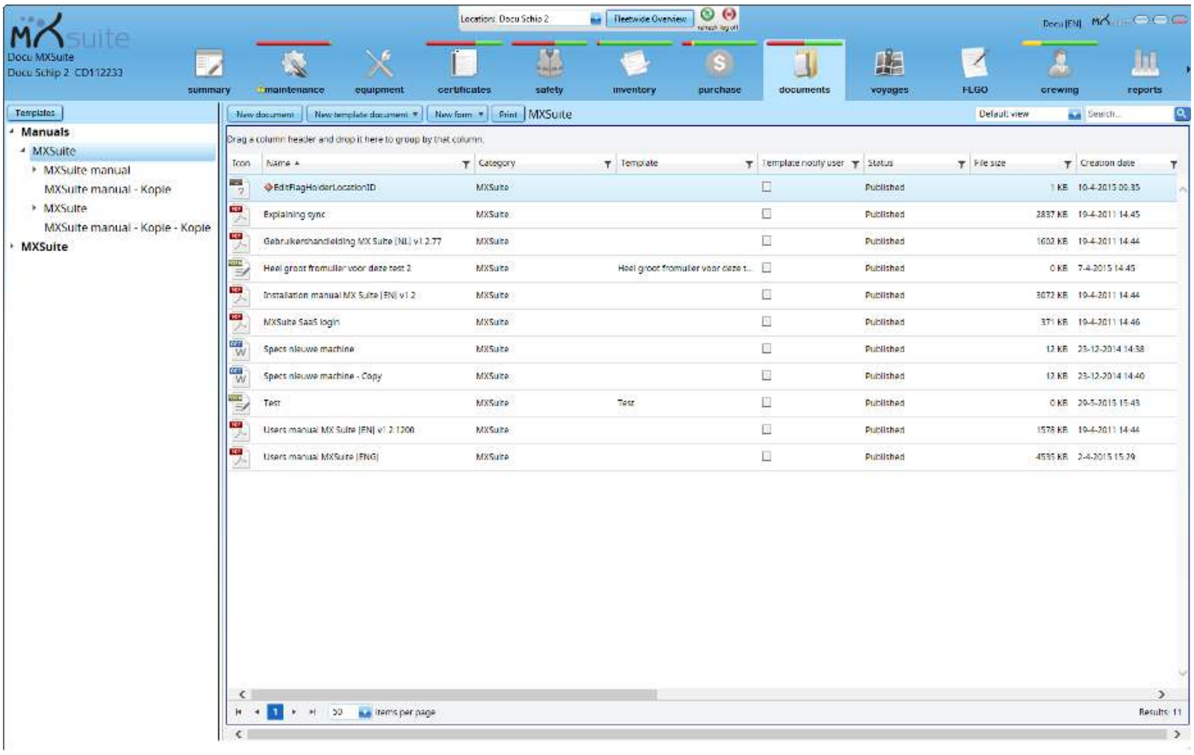
11.16 How do I link a supplier to an order line?

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**

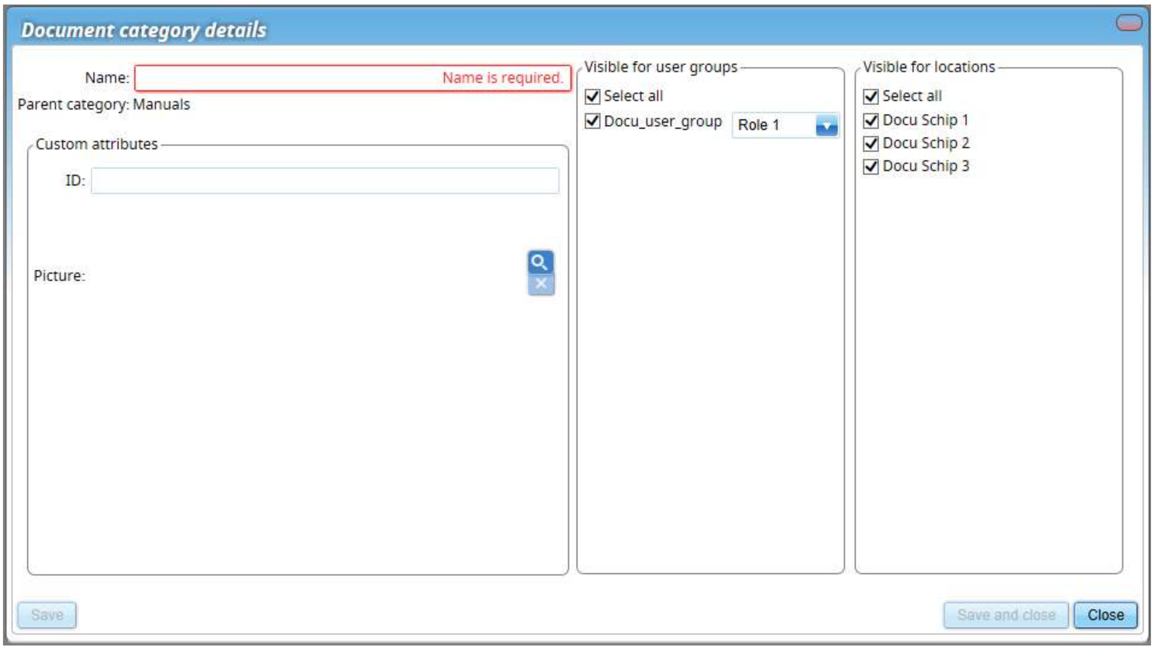
12 Documents



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.

12.1 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.

12.2 How do I copy a category?

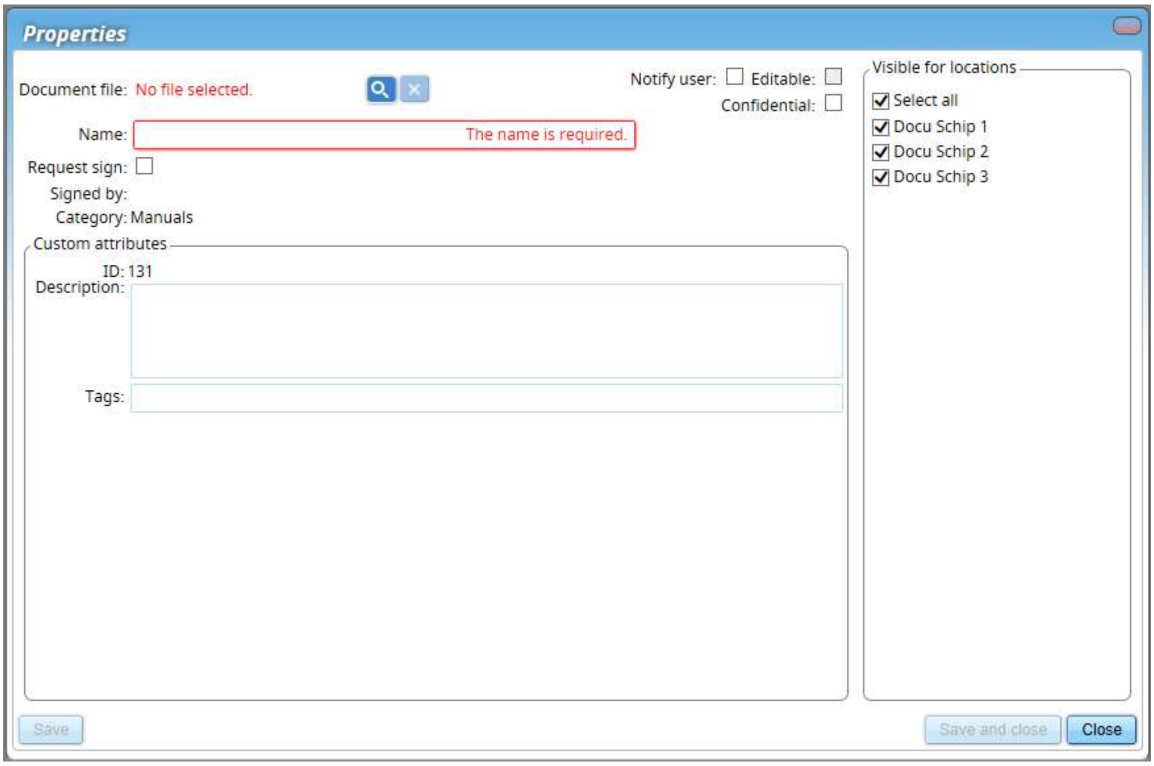
1. Right-click on the category and select **Copy**
2. Select the location you want to copy the category to
3. Right-click on the category and select **Paste**
4. A new category will be created with the copied documents. The pop-up window shows how many documents and categories have been copied

12.3 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

12.4 How do I create a new document?

1. Click on **New document**



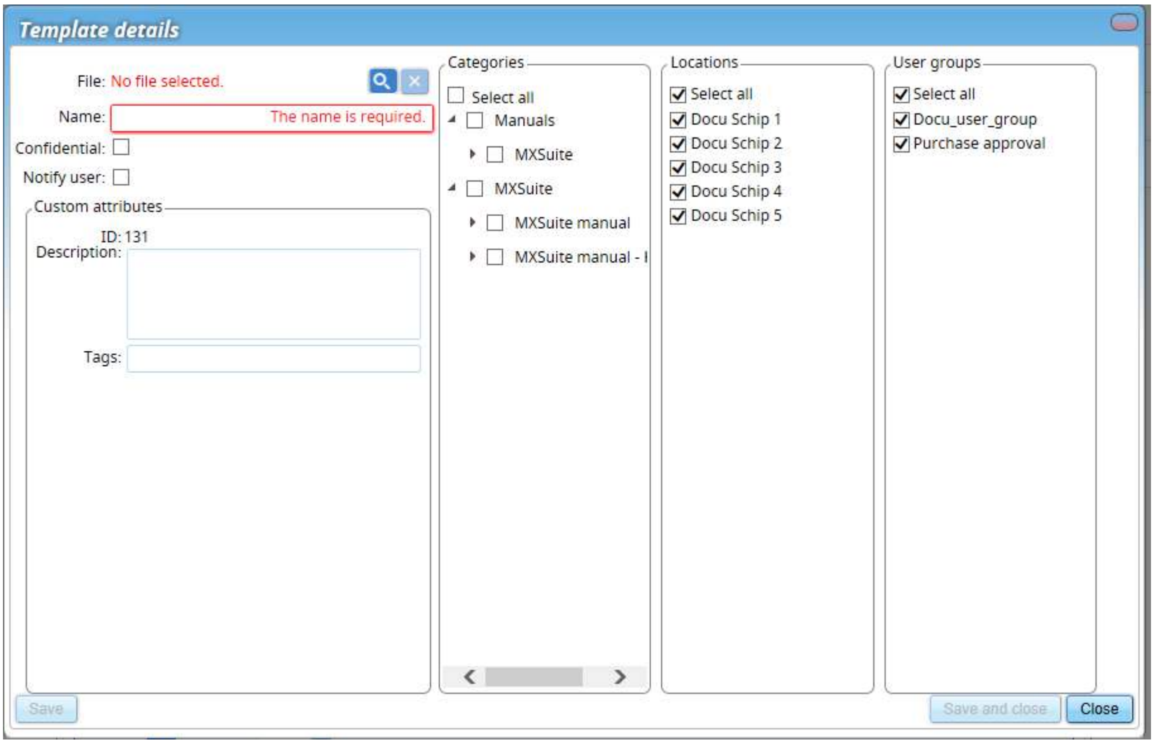
2. Click on  to select the **document**
3. Enter or edit the **name**. The name of the document will be automatically generated based on the chosen document
4. In the right column, select the **locations** for which the document should be visible
5. Complete all required fields
6. Click on **Save and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

12.5 How do I create a template?

1. Click on **Templates** at the top left
2. In the screen Manage templates, click on **New...** You can now enter the basic information from the new template



3. Click on to link the document
4. Enter the **Name** for the template
5. Select the **Categories** for which the template can be used

6. Select the **Locations** that can use the template
7. Select the **User groups** that can use the template
8. Click on **Save and close** to create the template

12.6 How do I edit a template?

1. Click on **Templates** at the top left
2. Right-click on the template and select **Edit template...**
3. The template can now be edited in an external editor
4. Save the file in the external editor and close the editor

5. Click on **Save**

12.7 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 and close** to create a document based on the template

12.8 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 and close**

12.9 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.

12.10 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

12.11 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.

12.12 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.

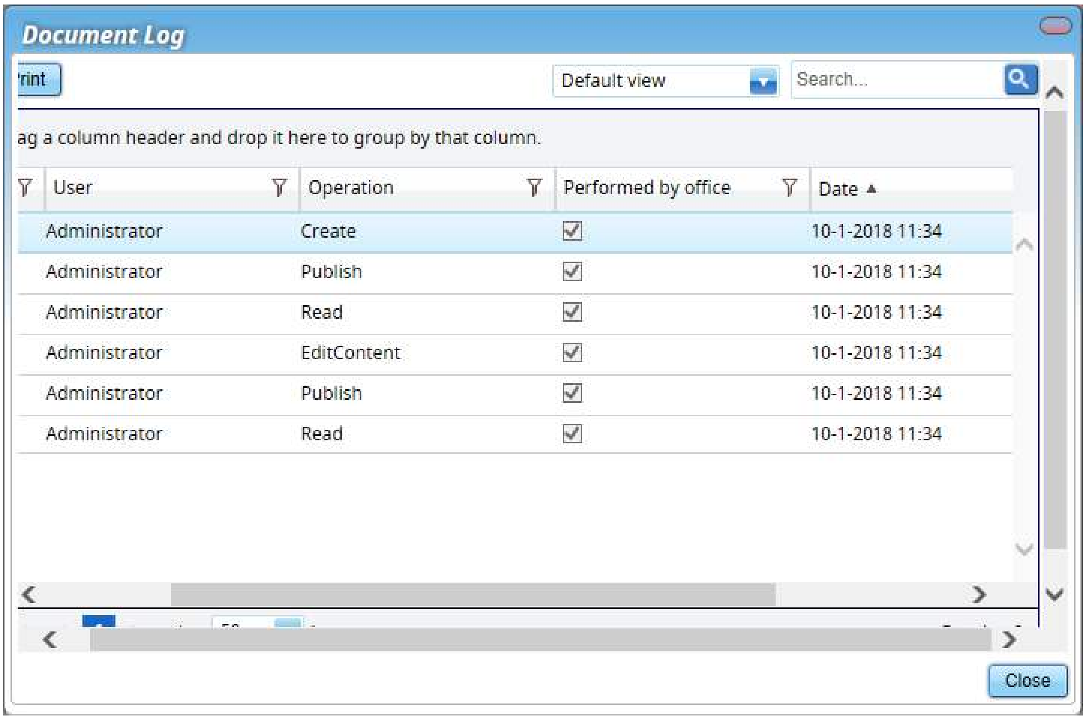
1. Right-click on the document
2. Select the option **Request edit**

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.

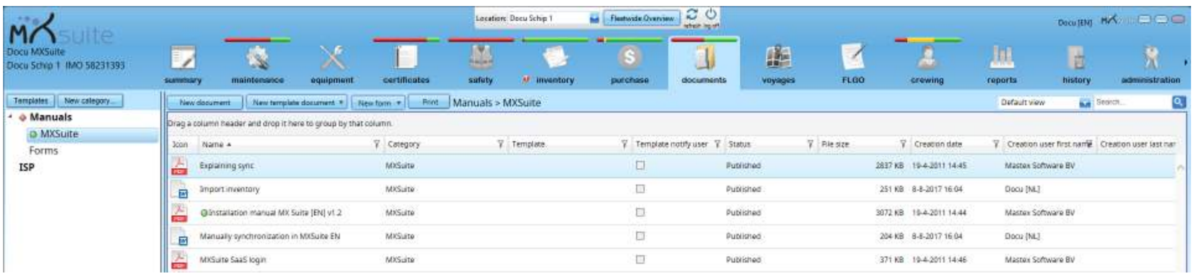
12.13 How do I see what happened to a document?

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



12.14 How do I search for a document?

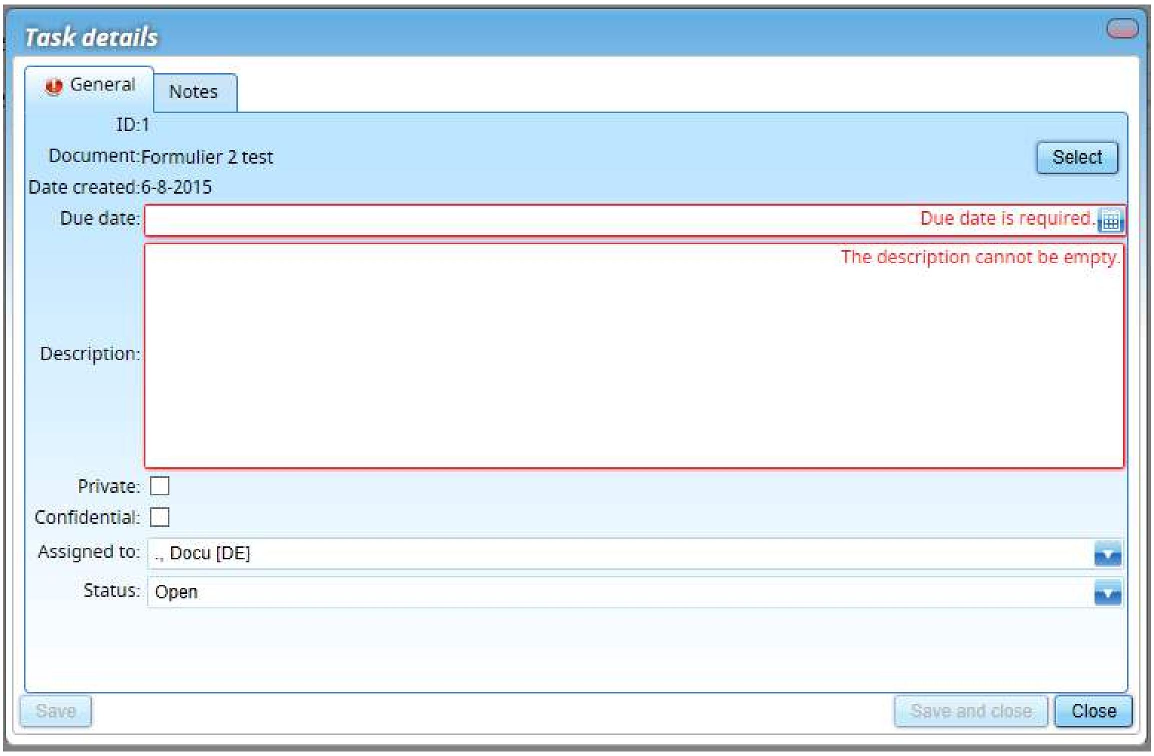
1. Enter a search term into **Search...**
2. All documents that contain the search term will be displayed



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.

12.15 How do I create a document task?

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

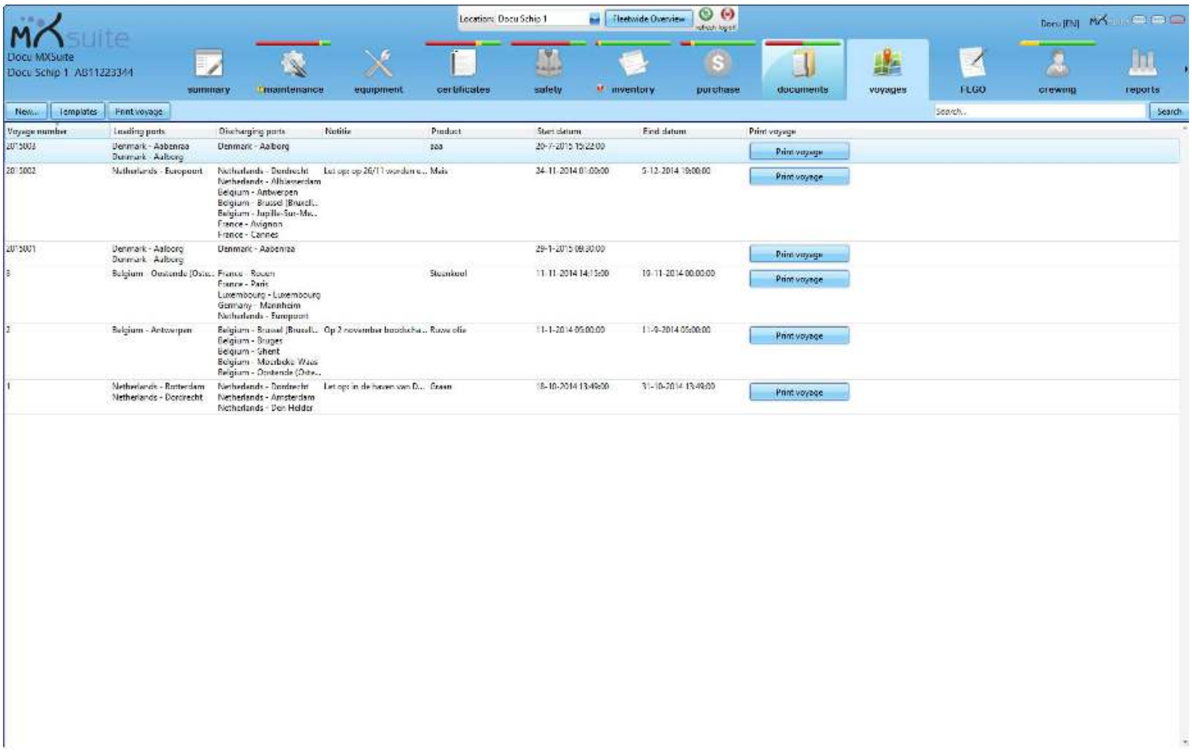


2. Enter the fields **Due date** and **Description**
3. Assign the task to a user
4. Select the **Status**
5. Click on **Save and close**

Optional:

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

13 Voyages

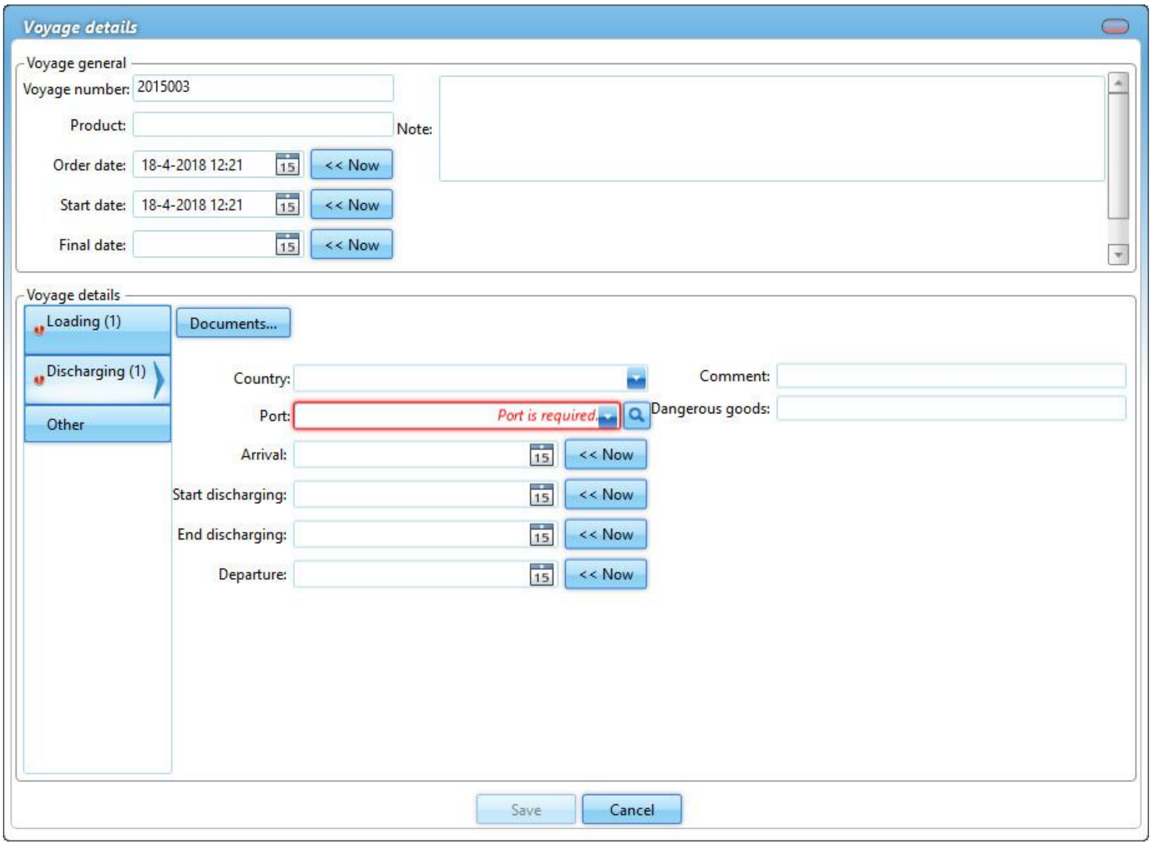


The module Voyages was designed to clearly register all travel data. You can add voyage documents, voyage times and important notes. You can design this module to suit your own preferences. To do so, simply change the preference settings in the module Administration. This manual describes the default settings.

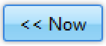
Tip:
You can edit the default names of the Loading and Discharging tabs in the module Administration. For example: you can view country and port names the tabs.

13.1 How do I create a new voyage?

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



2. Complete all required fields

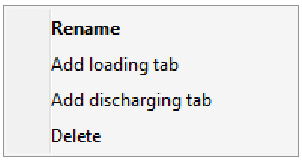
   Click on  to select a date and time or on  to use the current date and time

   Click on  to search for a port
3. Click on **Save**

13.2 How do I add a new loading or discharging tab?

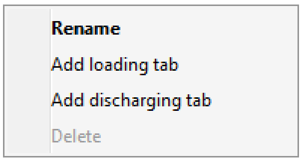
1. Right-click on a **Loading** or **Discharging** tab
2. Click on **Add loading tab** to add a loading tab

   Click on **Add discharging tab** to add a discharging tab
3. Complete all required fields
4. Click on **Save**



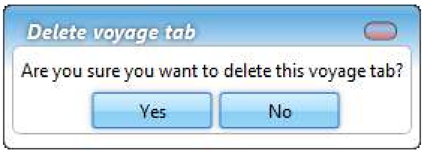
13.3 How do I change the name of a tab?

1. Right-click on a **Tab** and select **Rename**
2. Change the name of the tab and press Enter



13.4 How do I delete a tab?

1. Right-click on a **Tab** and select **Delete**
2. Confirm that you want to delete the tab in the pop-up that appears



13.5 How do I add a document to a voyage?

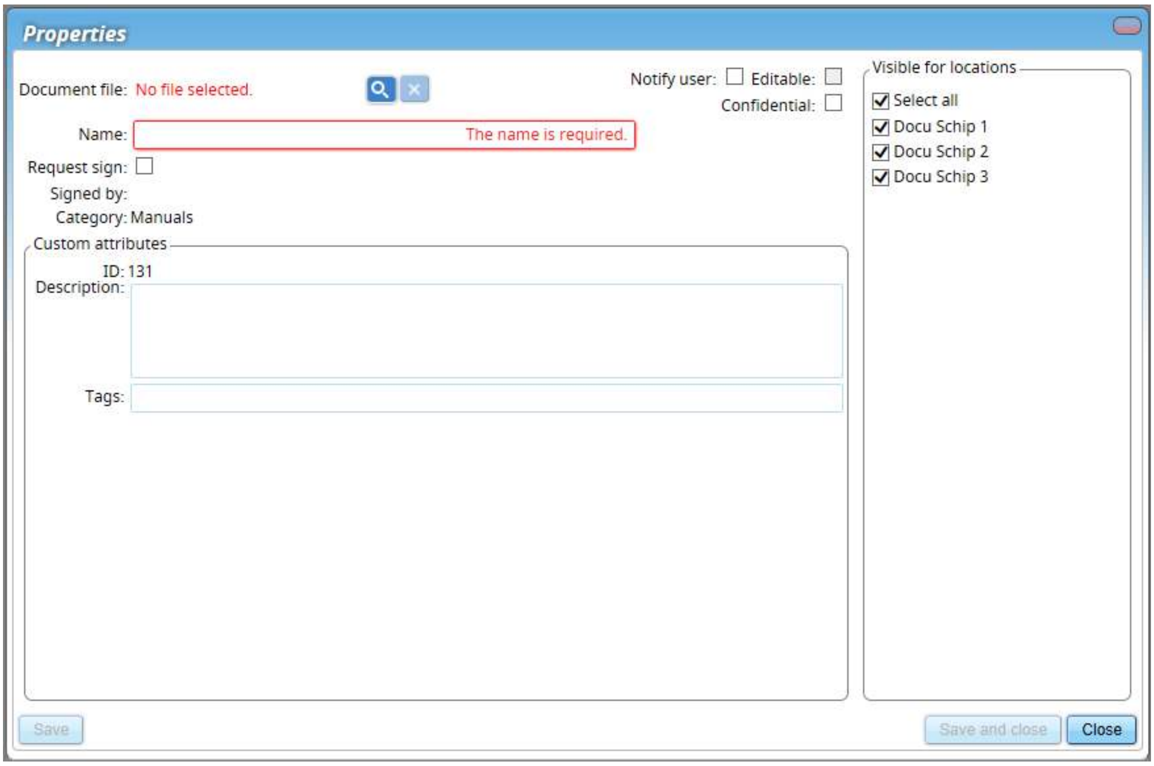
1. Open a voyage and select the tab you want to add a document to
2. Click on **Documents...**
3. The new documents can be added to the pop-up window

There are two kinds of documents that can be added:

- Documents
- Documents based on a template

13.6 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 and 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.

13.7 How do I create a document based on a template?

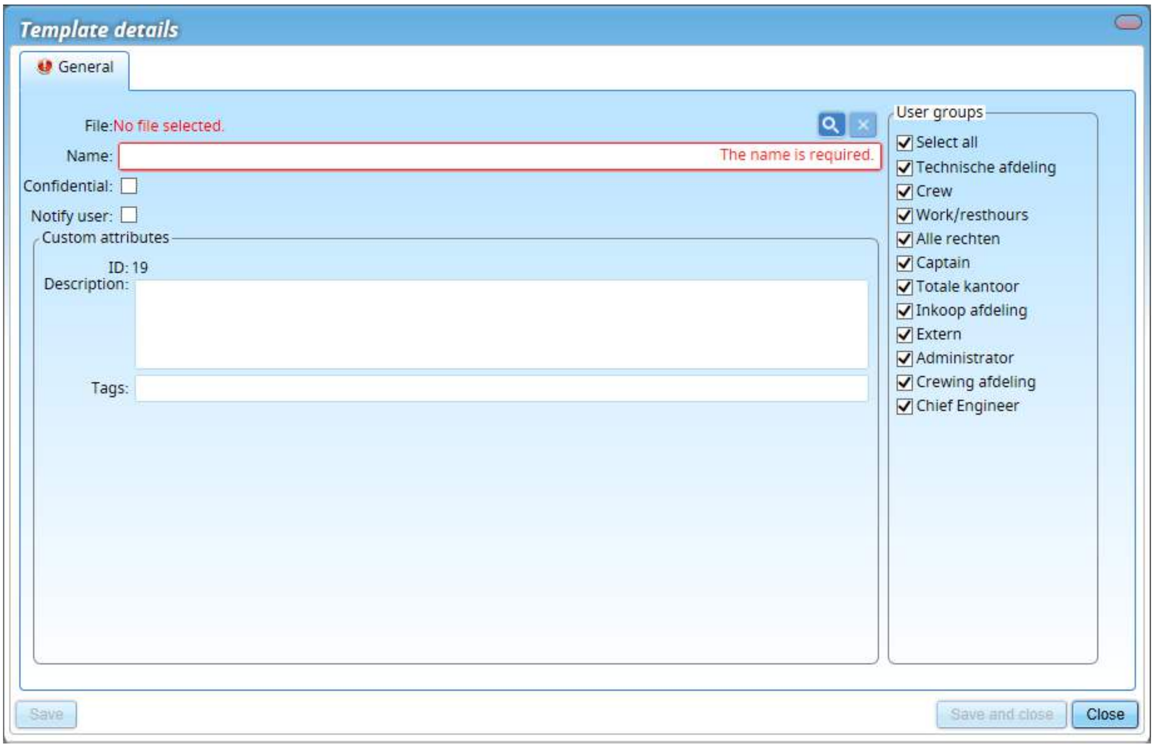
1. Click on **New template document**
2. Select a template from the drop-down menu
3. Complete all required fields
4. Select the location in which the document has to be visible
5. Click on **Save and close** to create a document based on the template

13.8 How do I add a template?

A template is used to create a new document for a voyage based on an existing document that is used as a template.

1. Click on **Templates**
2. Click on **New...**
3. Select the category/categories for which you want to create the template and click on **Ok**

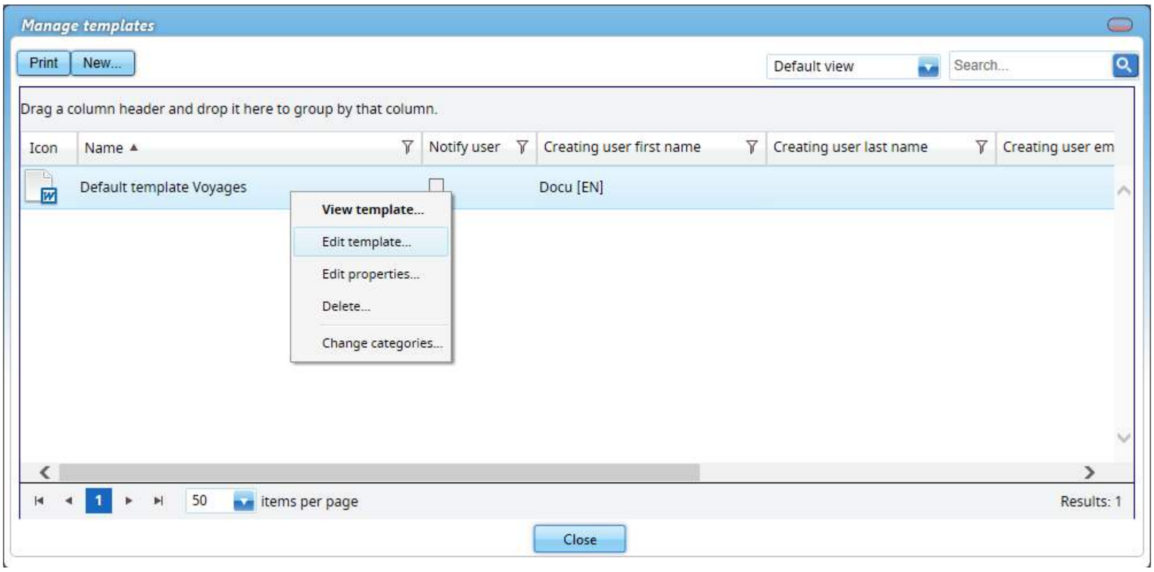
4. Complete all required fields



5. Select the user groups that are authorised to use this template
6. Click on **Save and close**

13.9 How do I change a template?

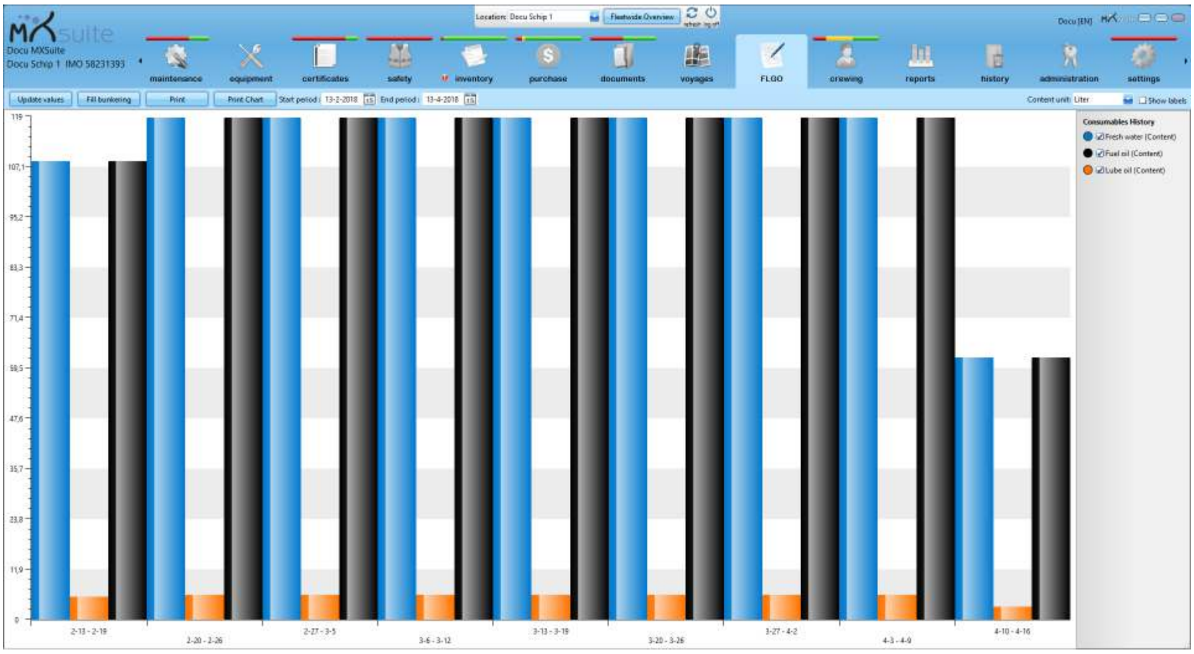
1. Click on **Templates**
2. Right-click on the template and select **Edit template...**



3. The template will be opened in the corresponding program (external editor) for editing. The template in the picture will be opened with Microsoft Word
4. Change the template in the corresponding program and save it

5. Close the external editor
6. Click on **Save**

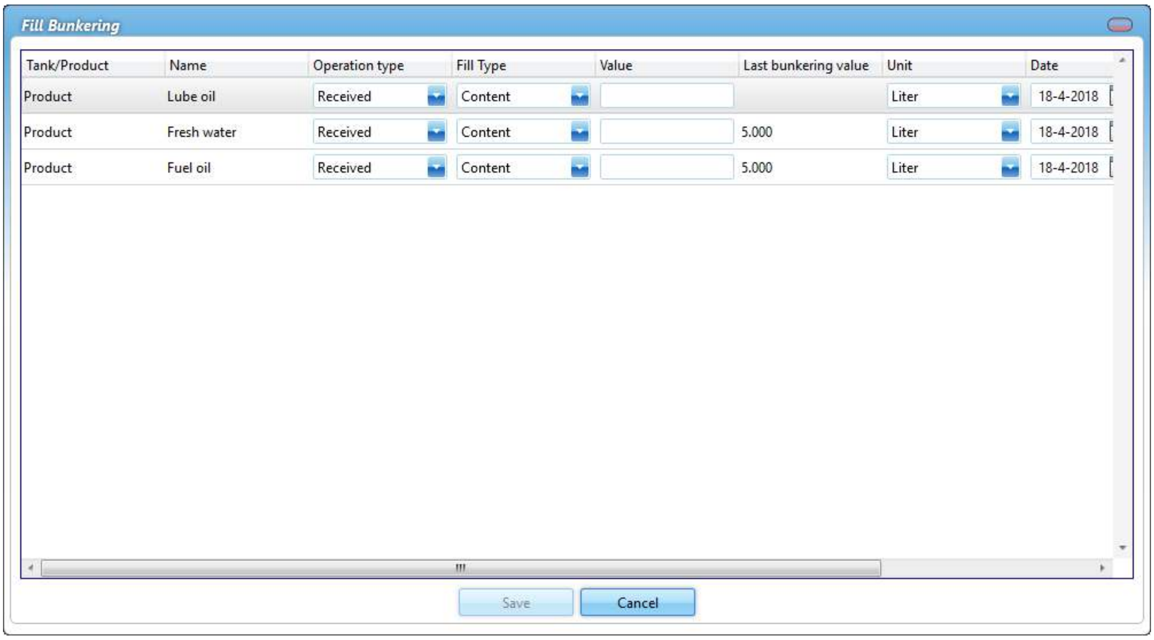
14 FLGO



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.

14.1 How do I enter the actual values?

1. Click on **Update values**



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

14.2 How do I enter received bunkering?

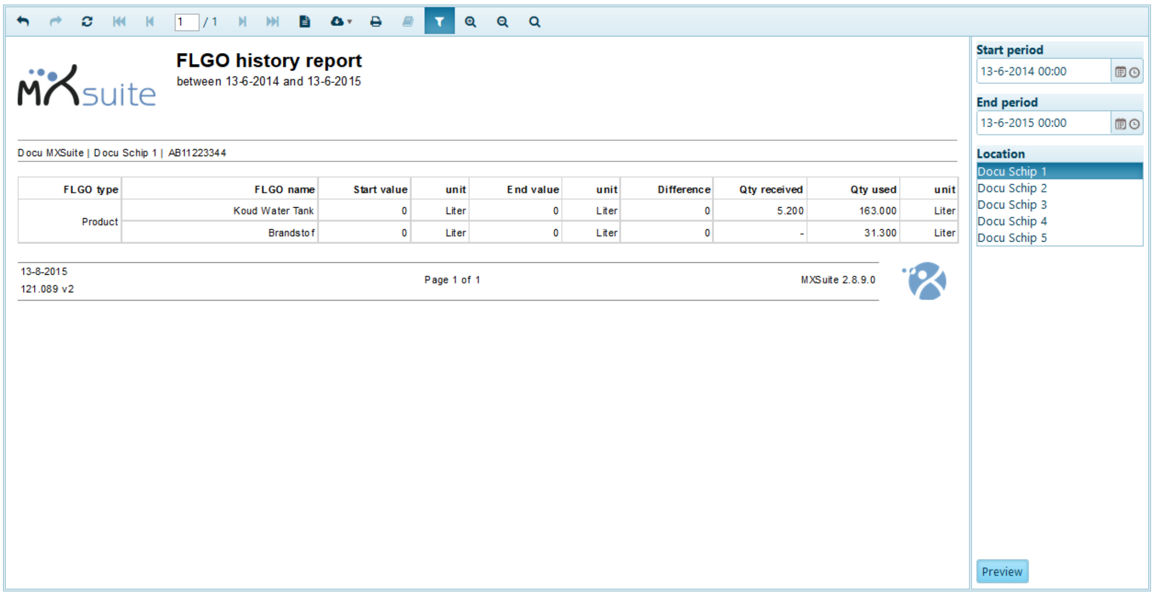
1. Click on **Fill bunkering**
2. At **Operation type**, select **Received** and enter the received quantities
3. Click on **Save**

14.3 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**

14.4 How can I see my consumption?

1. Click on **Print**



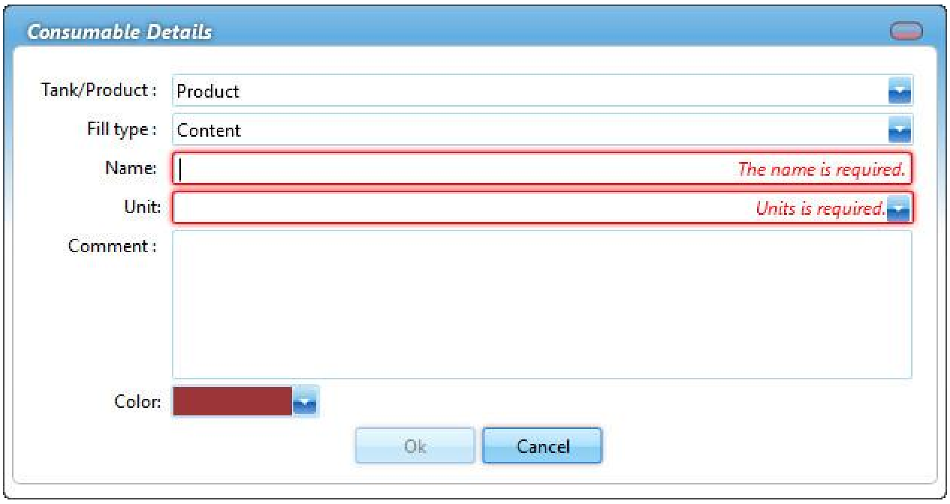
2. Select a **Start period** and **End period**
3. Select a **Location**
4. Click on **Preview**

14.5 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

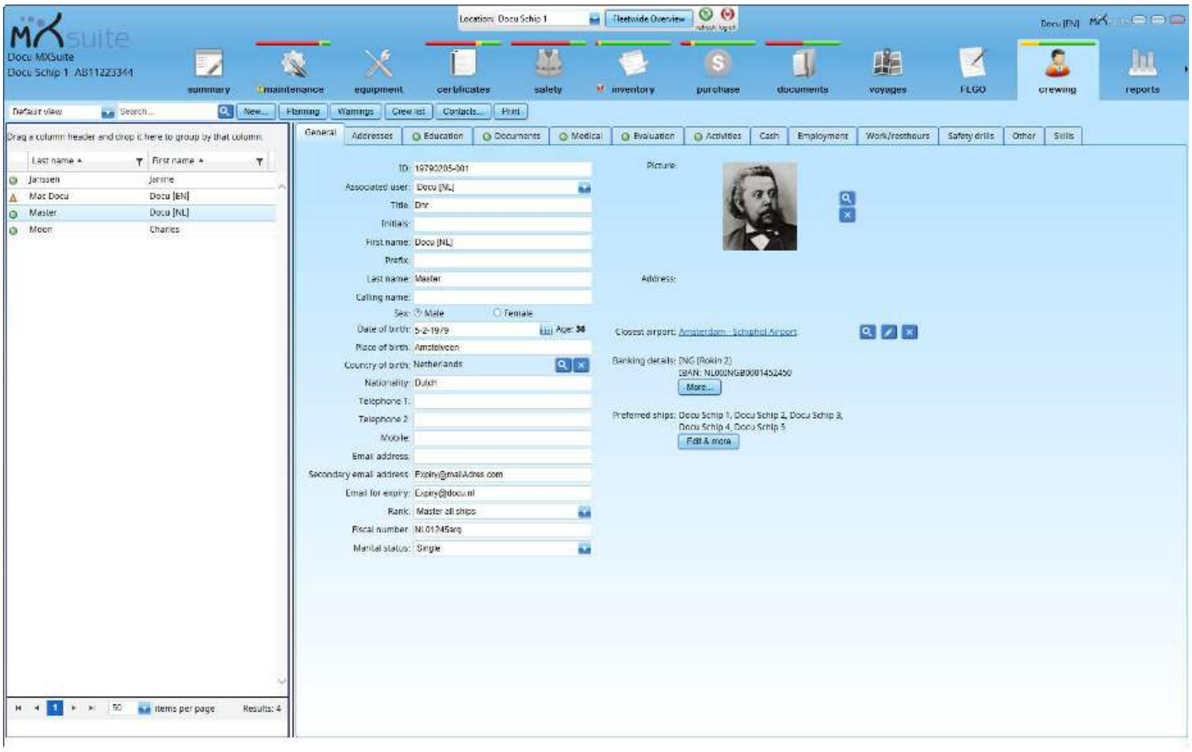
14.6 How do I create a new FLGO item?

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



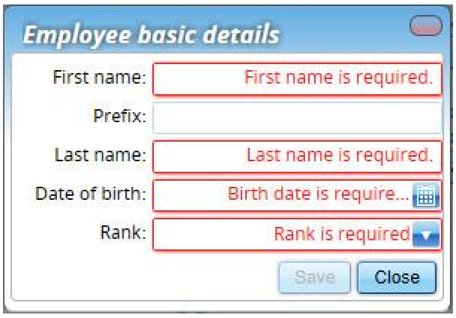
Tip:
If the desired unit cannot be selected, the MXSuite administrator can add this.

15 Crewing



The module Crewing is used to keep track of all crew data. It can be used to make schedules, keep track of work and rest hours, ensure safe manning practices and more.

15.1 How do I add a new person?



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

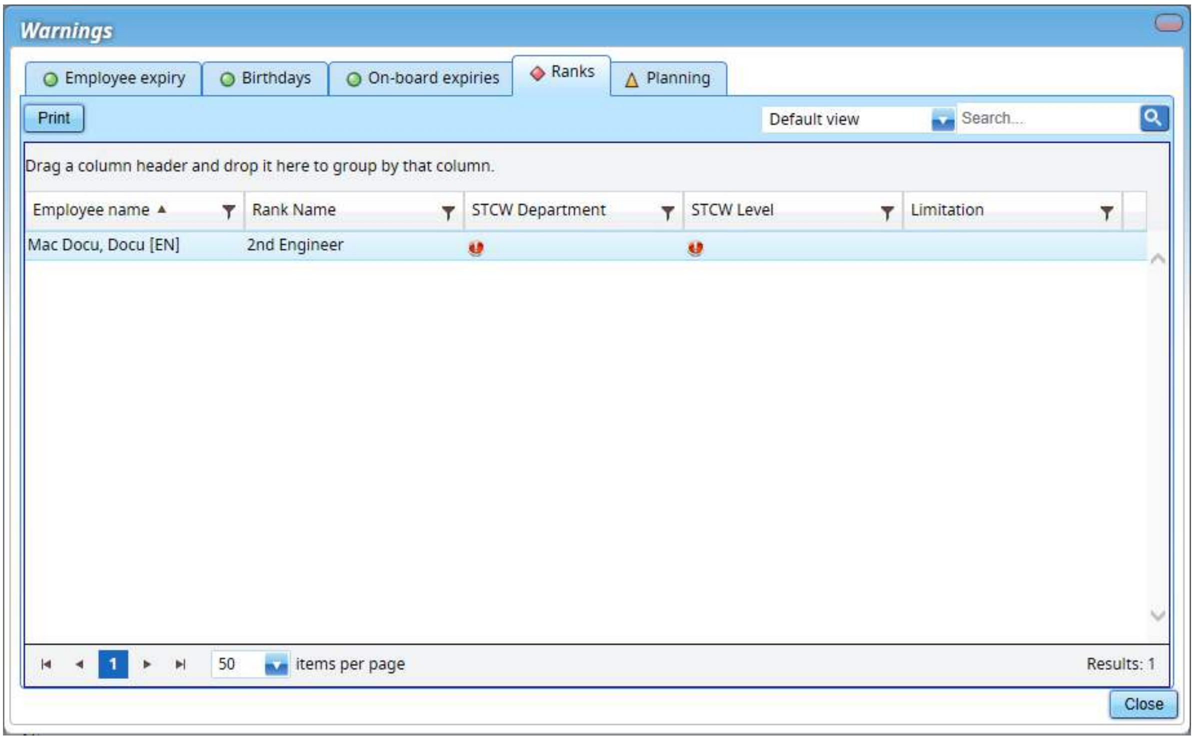
   The person has now been added, but you still need to enter or edit the additional information
4. Complete the required fields under the tab **General**
5. You can enter additional information in the other tabs
6. Click on **Save**

15.2 What is the use of the field email for expiry?

In the tab **General** you can enter an email address for expiry.
When an education, document or medical is about to expire, MXSuite will send a notification email to the specified email address. The email will contain an overview of all available data that has expired or is about to expire.

15.3 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.

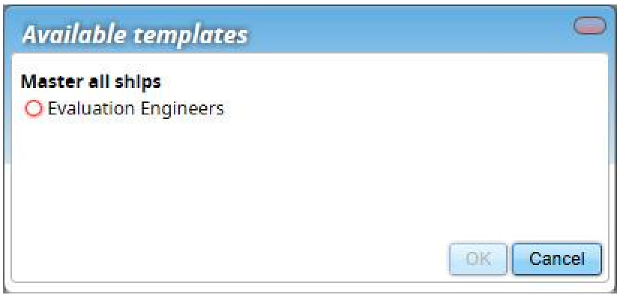
On board expiries: This shows the expired documents of crew members currently planned to be on board.

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.

15.4 How do I create an evaluation?

1. Select the **crew member**
2. Click on the tab **Evaluation**
3. Click on **New...**
4. Select an available template



5. Click on **Ok**
6. Complete the form
7. Click on **Save and close**

15.5 How do I register cash movements?

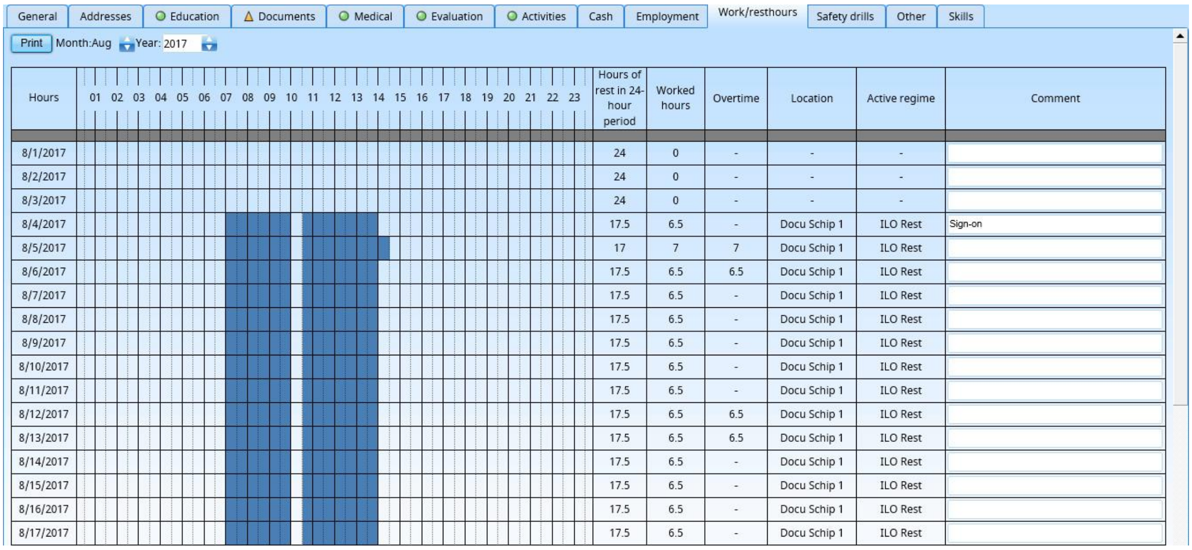
You can track cash movements in the **Cash** tab. The balance is updated and displayed at the top of the screen.

1. Select the **crew member**
2. Click on the **Cash** tab
3. Click on the desired option
4. Complete all required fields
5. Click on **Save and close**

> **Optional:**
>
> **Cash advance**: This refers to a sum of money given to a crew member as an advance.
> **Other advance**: This refers to other parts from stock. The stock includes a sales price for crew members.
> **Clearance**: This compensates the credit used with the salary payment.

15.6 How do I use the work/rest hours?

The tab **Work/rest hours** displays a monthly overview of the work and rest hours of the relevant person.



Hours	Hours of rest in 24-hour period	Worked hours	Overtime	Location	Active regime	Comment
8/1/2017	24	0	-	-	-	
8/2/2017	24	0	-	-	-	
8/3/2017	24	0	-	-	-	
8/4/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	Sign-on
8/5/2017	17	7	7	Docu Schip 1	ILO Rest	
8/6/2017	17.5	6.5	6.5	Docu Schip 1	ILO Rest	
8/7/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/8/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/9/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/10/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/11/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/12/2017	17.5	6.5	6.5	Docu Schip 1	ILO Rest	
8/13/2017	17.5	6.5	6.5	Docu Schip 1	ILO Rest	
8/14/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/15/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/16/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	
8/17/2017	17.5	6.5	-	Docu Schip 1	ILO Rest	

When a box (half-hour) is selected, this is considered as time worked. All empty boxes are therefore rest hours.
The values in the fields work/rest hours and overtime hours are calculated automatically, but can be edited by someone with sufficient user rights.
The value will be recalculated once the number of hours worked is changed.
The overtime hours are calculated as follows:

- Working more than X hours per day
- Working on a weekend
- Working on a holiday

When the hours are entered in the office version, it is assumed that the hours were worked on the ship selected at the top of MXSuite.

The work and rest hours will be checked against the actual work regime. If these do not meet the legal requirements, the corresponding period will be marked in red. If you hover your mouse over the red sentence, a notification will appear explaining why this sentence is red.

15.7 What do the colours in the work/rest hours mean?

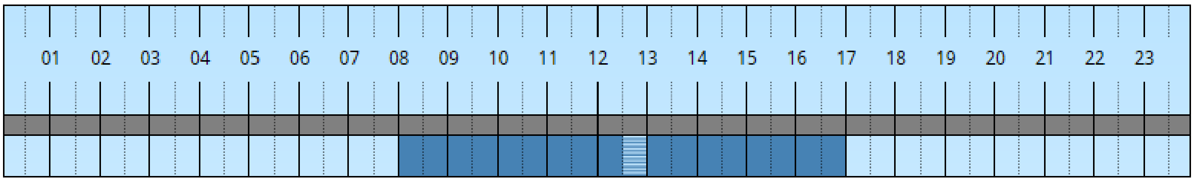
MXSuite distinguishes between rest hours and short breaks.

According to MLC 2006 short work breaks are not considered as rest hours. Depending on the settings in MXSuite, a working interruption of a maximum of 2 hours may or may not be counted as rest hours.

Rest hours are indicated in light blue.

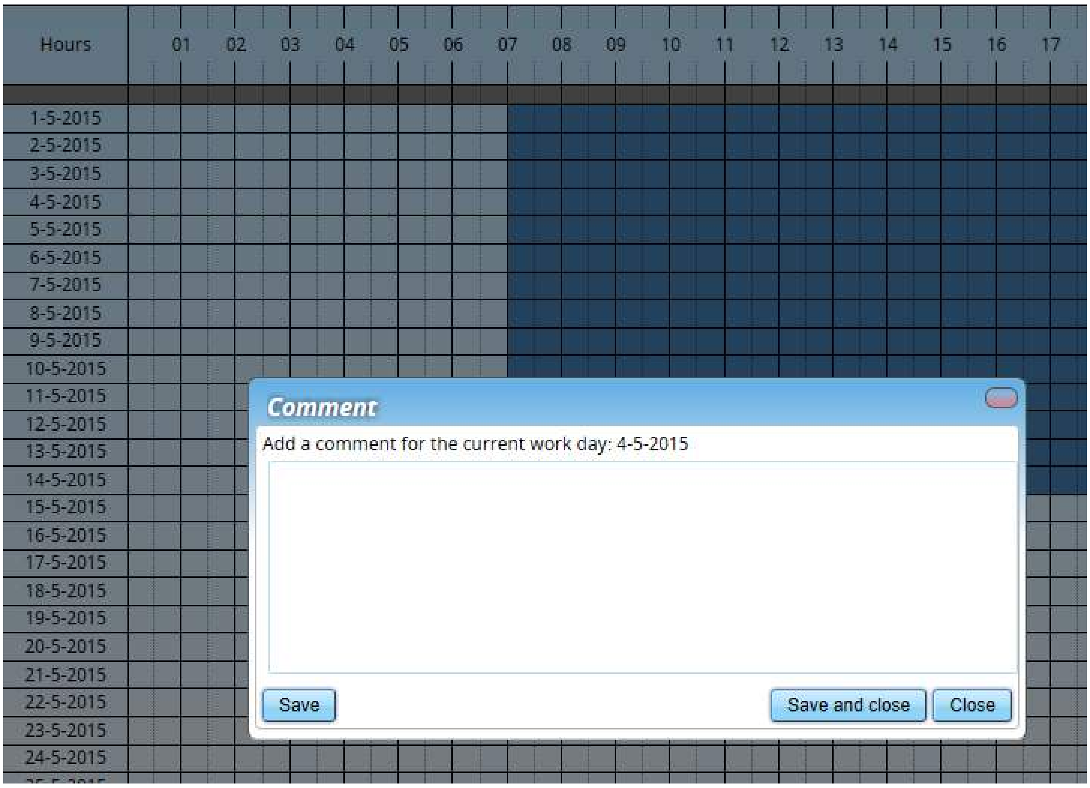
Work hours are indicated in dark blue.

Short work interruptions that are not viewed as rest hours are indicated with shading.



15.8 How do I add a comment to work/rest hours?

1. Right-click on a date and select **Comment...**

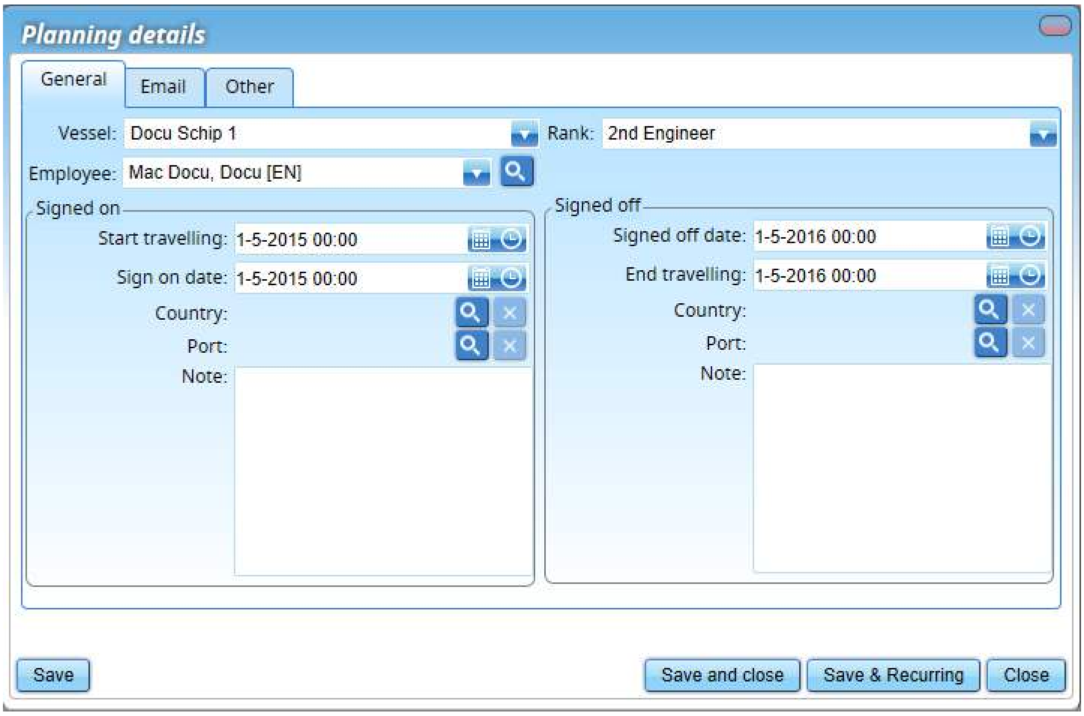


2. Enter the comment and click on **Save and close**

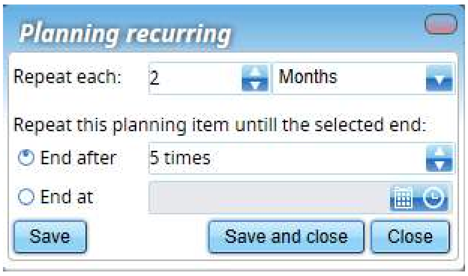
15.9 How do I make a planning?

The **Planning** section has an overview of the ships with the scheduled crew members listed by rank.

1. Right-click on a non-scheduled part of a rank and click on **New...**
2. Complete all required fields



3. Click on **Save and close** or **Save & Recurring**
   With the function **Save & Recurring** it is possible to create a recurring schedule



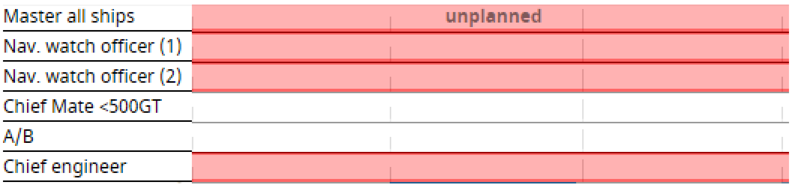
4. Enter the fields for recurring schedules and click on **Save and close**

Note:
If an employee cannot be scheduled on a specific ship, check to make sure the ship has been listed as one of the employee's preferred ships.

15.10 What do the colours mean in the planning?

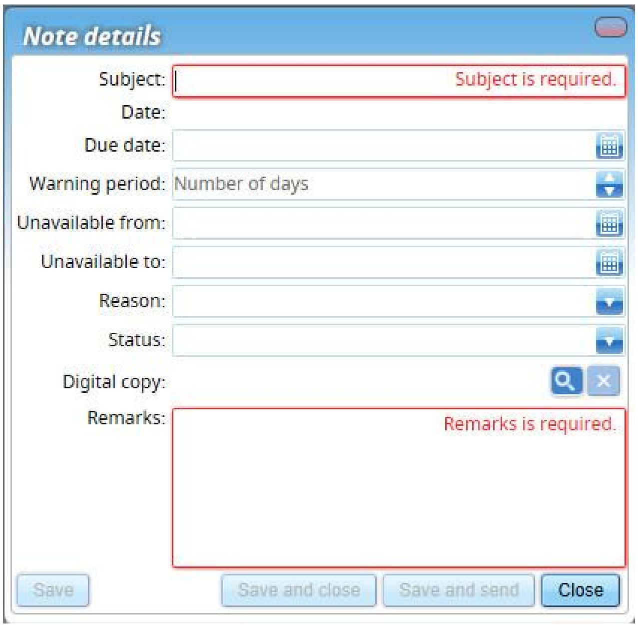
When safe manning does not require a certain rank to be scheduled, this rank will be displayed as a white line.

A red line indicates that this rank is required according to the safe manning, but has not yet been scheduled.



15.11 How do I register that a crew member cannot be planned on board?

1. Select the **crew member**
2. Click on the tab **Activities**
3. Click on **New** and select **New note**

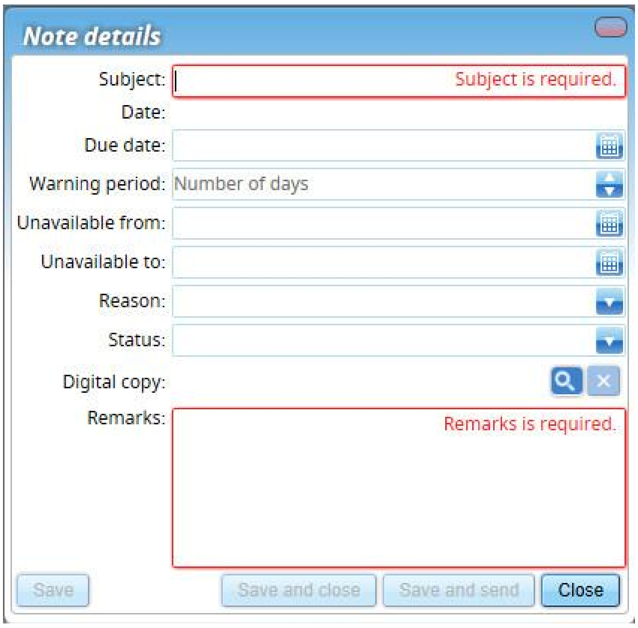


4. Complete all required fields
5. Enter the date from when the crew member is unavailable for planning
6. Enter the date until the crew member is unavailable for planning
7. Click on **Save and close** or **Save and send**

15.12 How do I add a note?

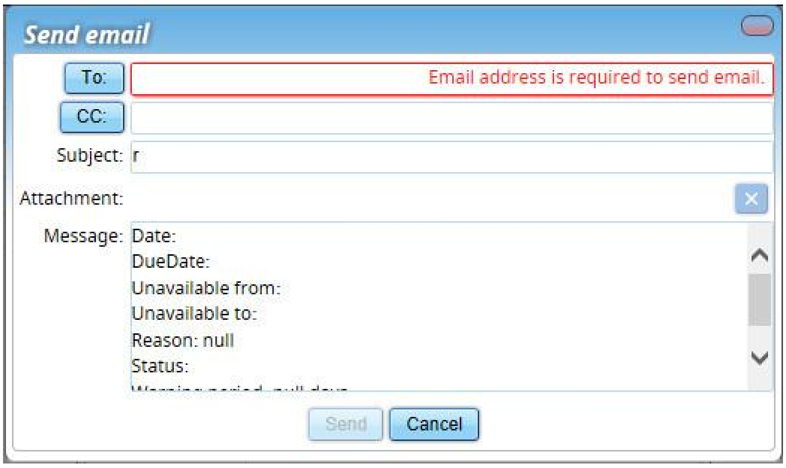
1. Select the **crew member**
2. Click on the tab **Activities**

3. Click on **New** and select **New note**



4. Complete all required fields
5. Click on **Save and close** or **Save and send**

   If you select **Save and send**, you will be able to send the note via email



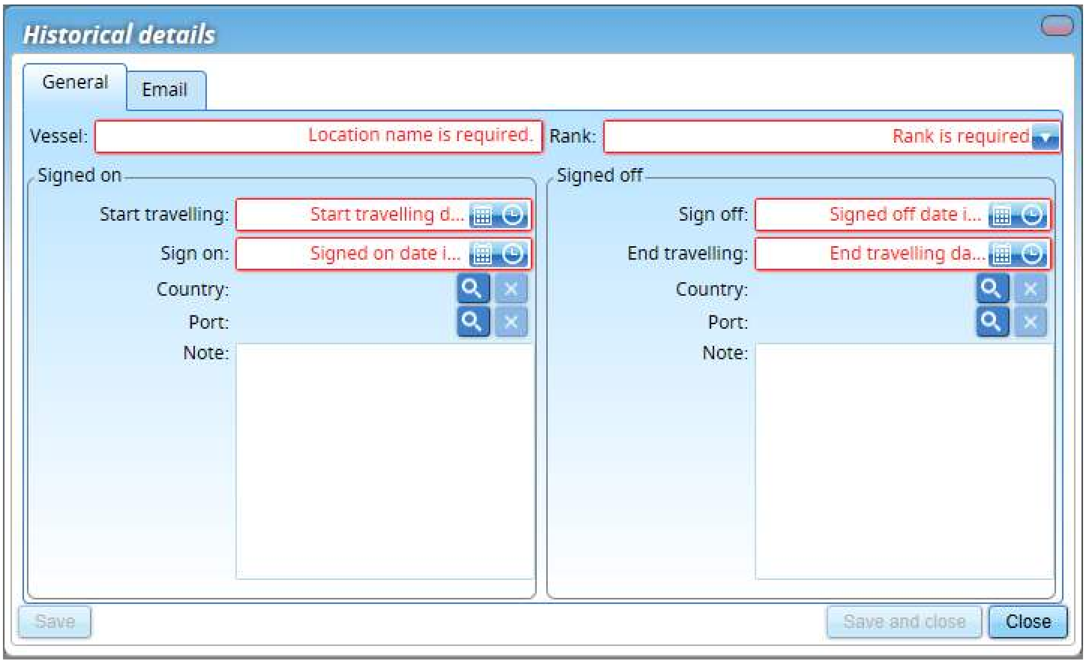
15.13 When and how do I add a historical planning?

To get an idea of someone's experience level, it can be useful to add the accumulated sailing history. To do so, use the option **historical planning**.

Follow the steps to add a historical planning:

1. Select the **crew member**
2. Click on the tab **Activities**
3. Click on **New** and select **New historical**

4. Complete all required fields



5. Unlike normal planning, which involves selecting a ship from the available ships in the license, this option allows you to enter the name of any ship
6. Click on **Save and close**

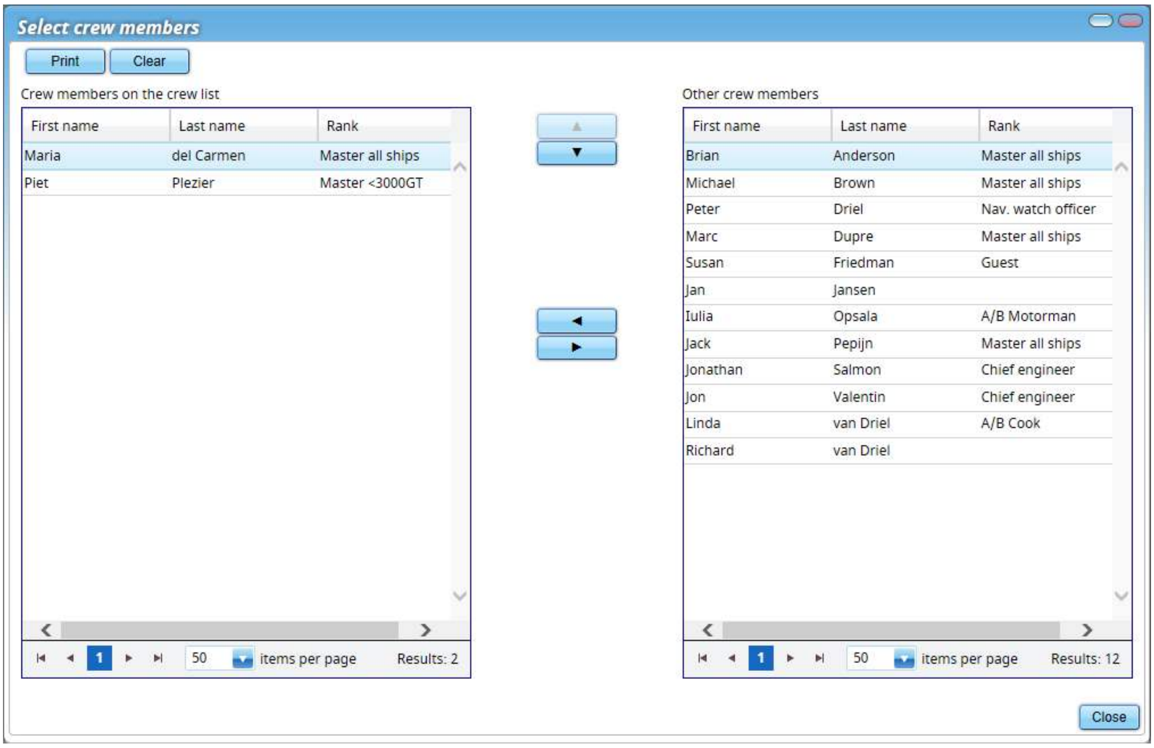
15.14 How are the number of days on board calculated?

In the tab **Activities** the number of days that a person has been on board is displayed. The days on board are calculated as the difference between the **sign-on date** and the **sign-off date,** which are specified in the planning.

Sometimes, the sign-on day or sign-off day is not counted as day on board. This is due to the settings in MXSuite, where you can indicate whether half-days are calculated as full days.

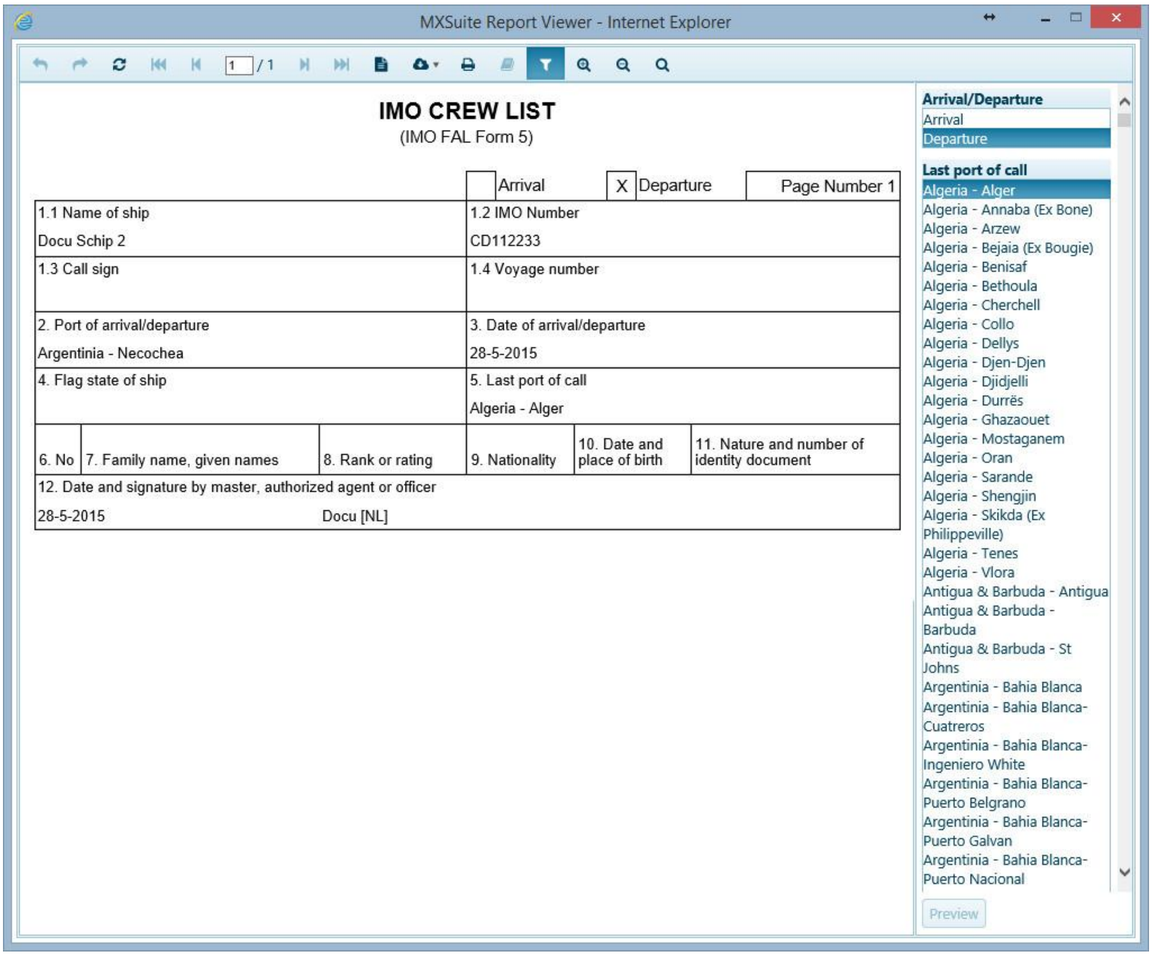
15.15 How do I create a crew list?

1. Click on **Crew list**
2. Select the crew to display on the **Crew list**



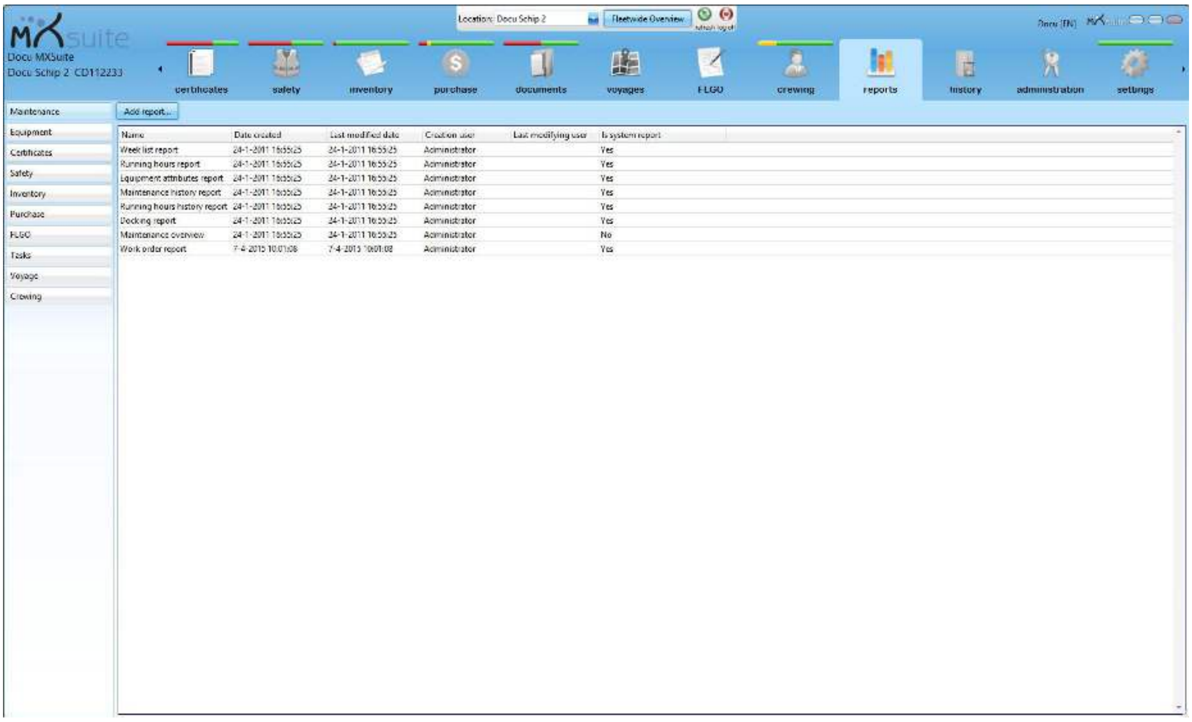
3. Click on **Print**

4. Select the necessary data in the right-hand column



5. Click on **Preview**

16 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.

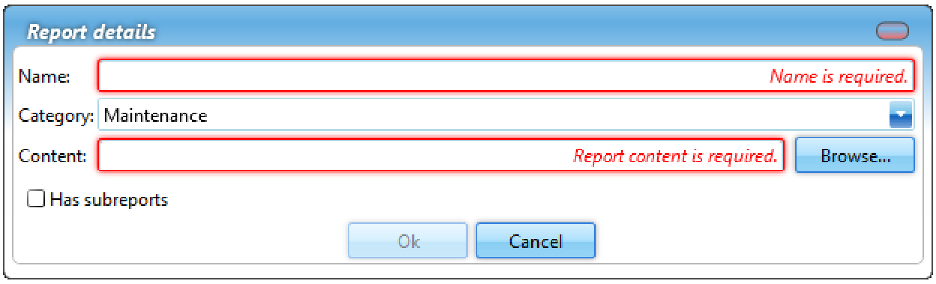
16.1 How do I create a new report?

Reports cannot be created in MXSuite. To do this, use **Microsoft Report Builder** (which can be downloaded for free from the Microsoft website).
Creating a report requires knowledge of Microsoft SQL Server.

Mastex Software BV does not offer support in creating reports. However, we can create reports for you.

16.2 How do I add a report?

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



3. Complete all required fields
4. Click on **Ok**

16.3 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.

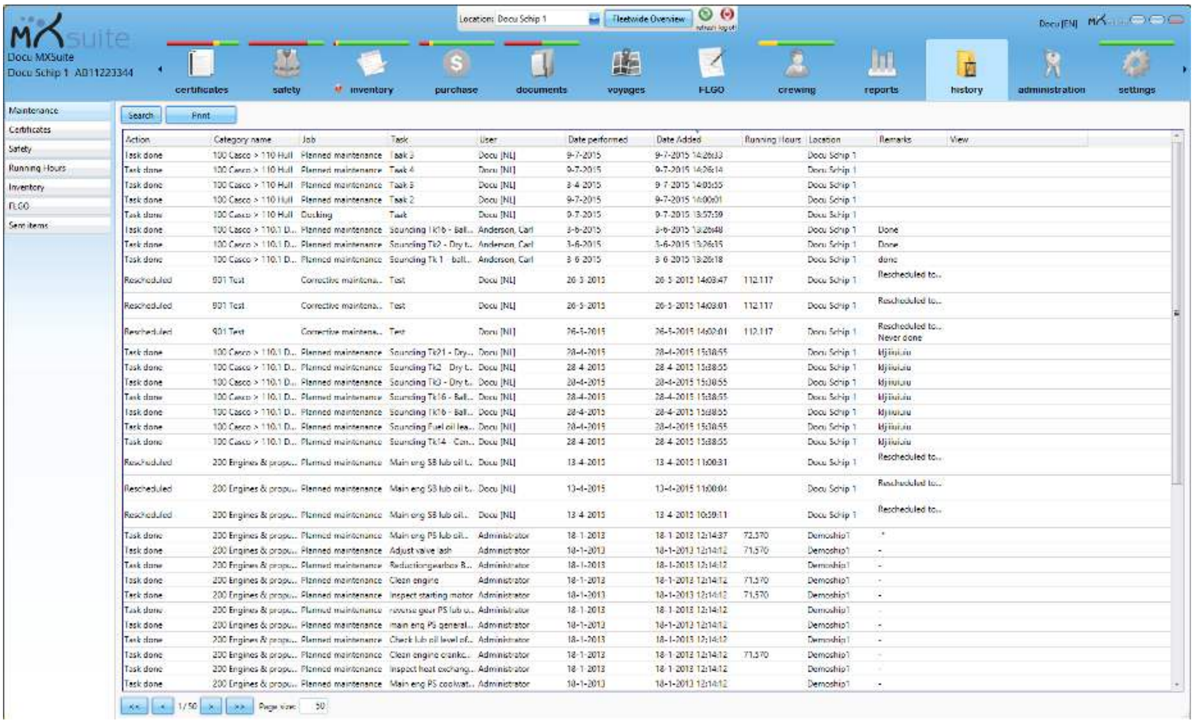
16.4 How do I delete a report category?

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

16.5 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**

17 History



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

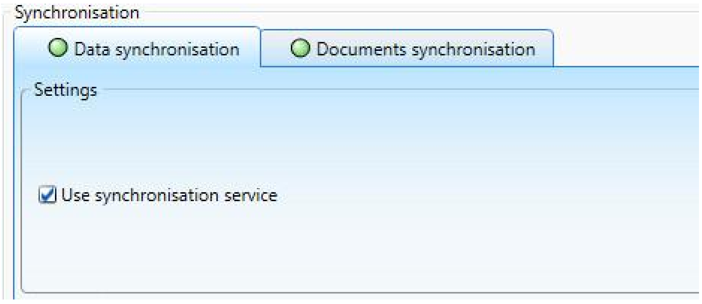
- Maintenance
- Certificates
- Safety
- Running hours
- Inventory
- FLGO
- Sent items (emails)

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

18 Synchronisation

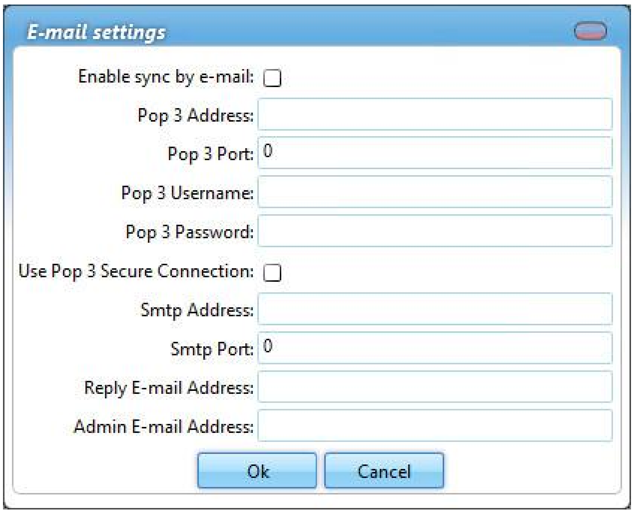
18.1 How do I turn a synchronisation flow on and off?

1. Go to the module **Settings**
2. Click on **Communication**
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



18.2 How do I configure email synchronisation?

1. Go to the module **Settings**
2. Click on **Communication**
3. Click on **Email settings**
4. Click on **Synchronise via email**
5. Enter the POP3 details to receive emails and the SMTP details to send emails



Optional:

Admin email address: If the synchronisation package cannot be loaded or sent, the email will be forwarded to this email address. Emails that are not recognised as synchronisation emails are also sent to this address.

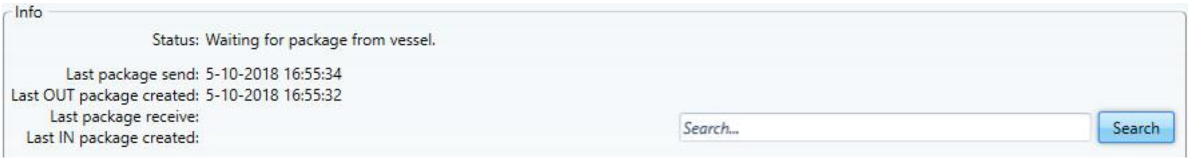
Please note:

Inform Mastex Software BV about the email address entered as **Reply Address** to ensure the automatic recognition of synchronisation packages proceeds smoothly.

18.3 How can I check the synchronisation?

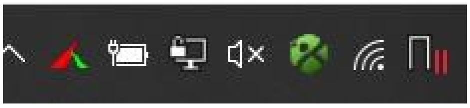
1. Go to the module **Settings**
2. Click on **Communication**
3. Select the location

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



18.4 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.

18.5 How do I synchronise manually?

To create and save a synchronisation package:

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

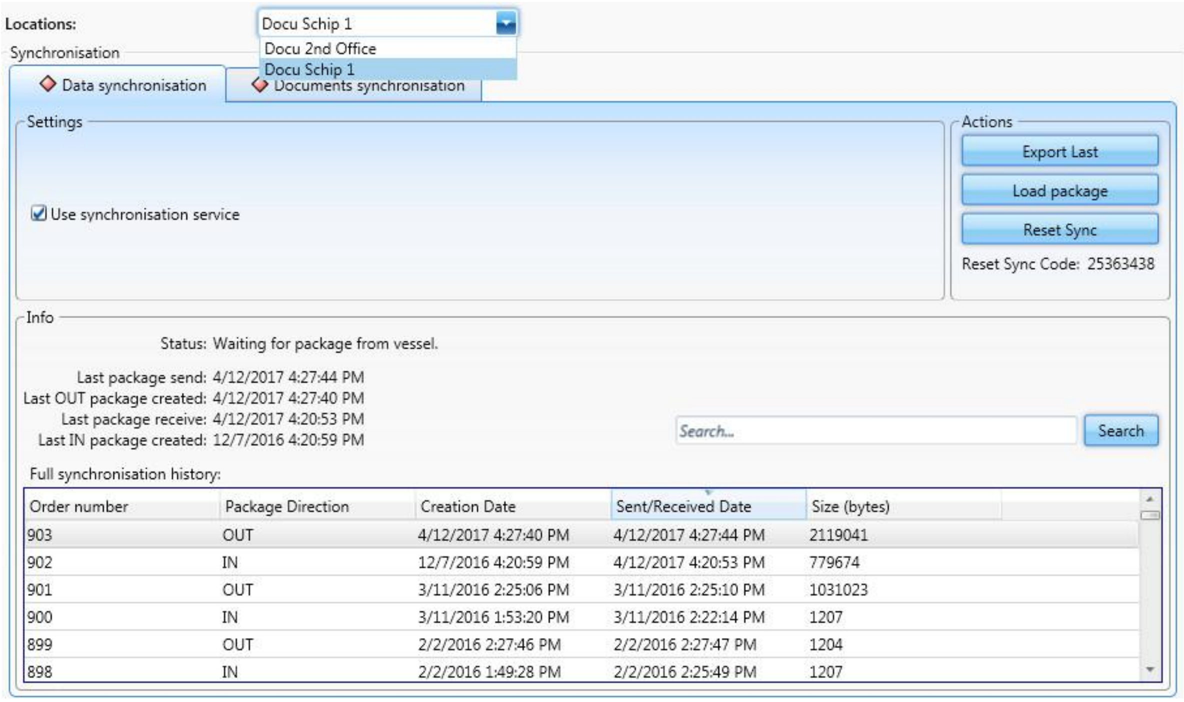
To load a synchronisation package:

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

The file name is structured as follows:
<ship name>_Data_<package number>.mxs
<ship name>_Documents_<package number>.mxs

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

1. Go to the module **Settings**
2. Click on **Communication**
3. Click on **Locations**
4. 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.

18.7 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 **Settings**
2. Click on **Communication**
3. Click on **Reset Synchronisation**
4. Answer the verification question with **Yes**
5. Click on **Create a package** to create the first synchronisation package
6. Note down the **Reset Sync Code** as displayed in the office version

On board the ship:

7. Go to the module **Settings**
8. Click on **Communication**
9. Click on **Reset Synchronisation**
10. Run the **Reset Sync Code** from point 6 and click on **Yes**
11. 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.

18.8 How can I create a backup of the database?

1. Go to the module **Settings**
2. Click on **Communication**
3. Click on **Backup Database**
4. Save the file to the desired location

Important!
When the backup has been returned, general data (such as countries and ports) may appear multiple times in MXSuite.

18.9 How do I copy data?

1. Select the ship you want to copy data from
2. Go to the module **Settings**
3. Click on **Communication**
4. Click on **Copy Data**
5. Select the data to be copied

6. Click on **OK**

7. Select the destination and click on **OK**

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.

18.10 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.

18.11 What information does the synchronisation overview contain?

The following columns are visible in the synchronisation overview.

Full synchronisation history:

Order number	Package Direction	Creation Date	Sent/Received Date	Size (bytes)
31	OUT	21-12-2018 12:01:02	21-12-2018 12:01:03	2397471
30	IN	21-12-2018 10:55:21	21-12-2018 11:55:50	418889
29	OUT	30-11-2018 16:29:03	30-11-2018 16:29:04	2685
28	IN	30-11-2018 15:50:02	30-11-2018 16:25:50	1212
27	OUT	30-11-2018 15:24:19	30-11-2018 15:24:20	1212
26	IN	30-11-2018 14:45:30	30-11-2018 15:20:57	1212

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.