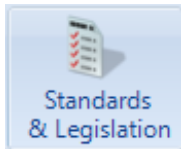


Standards & Legislation

Wed, Jan 17, 2024 [Core Data](#)

Standards and Legislations must first be created to allow for the creation of Certificate Requirements which in turn will become selectable within PPM Contracts. Click "Standards & Legislation" to view/modify any Standards & Legislation available in the system.

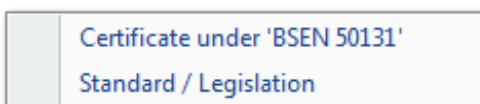
This is the "Standards & Legislation" button:



1. The first step is to select the Client that will be used. For information on how to do this, see the [Client Selection](#) page.
2. This is the Standards & Legislation screen. It is possible to tick and un-tick the desired Standards & Legislation depending on which types you want available throughout the system. As with many other parts of the application, there is the ability to add items and edit items within the list using the "Add" and "Edit" buttons.

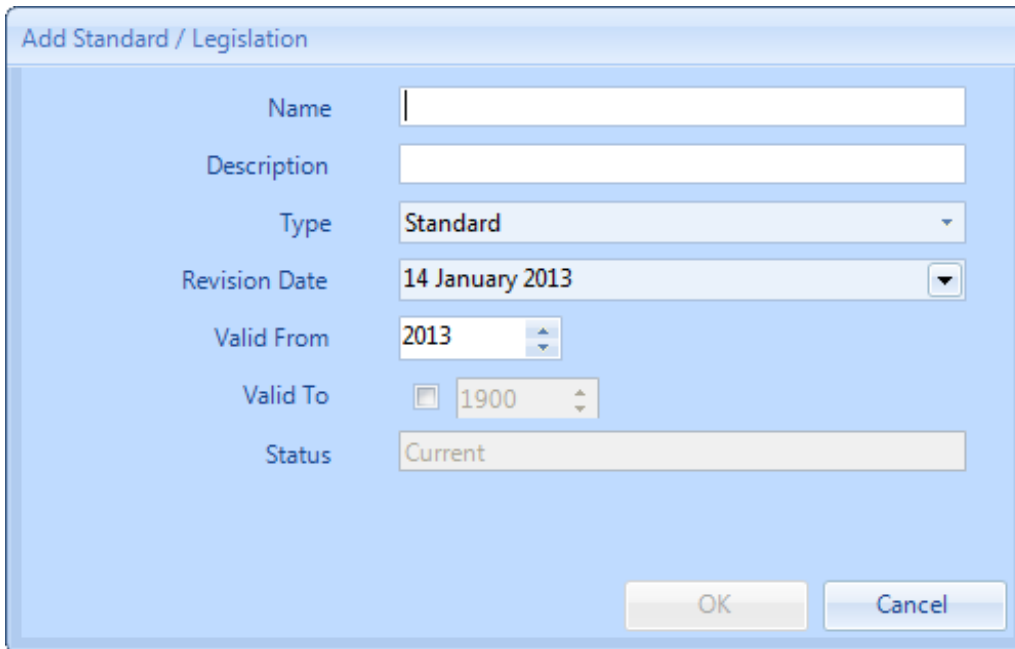
A screenshot of the "Demo Commercial Standards / Legislation" window. The window has a title bar and two main panes. The left pane, titled "Standards / Legislation", contains a tree view of various standards and legislations, including "BSEN 50131", "Intruder Alarm Inspection", "BSEN 858-1:2002", "Interceptors", "Certificate Compliance", "Commercial & Industrial Sprinklers", "Control and Prevention of Legionella (ACOP L8)", "Drain Down Certificate", "Humidifier", "Water Chlorination", "Water Management/Monitoring", "Water Risk Assessment Desk Top Study Report", "Control of Substances Hazardous to Health 2002", "Photo Lab Air Change", "Electricity at Work Regulations 1989", and "5 Year Electrical In". The right pane, titled "Standard / Legislation Details", shows details for the selected item "BSEN 50131", including its Name, Description, Summary, Revision Date, Valid From, and Status. At the bottom right of the window are "Save" and "Cancel" buttons.

3. Click on "Add" to add a Standard, Legislation or Certificate. Choose whether to add a "Standard/Legislation" or a "Certificate" under the currently selected standard/legislation.



4. If a Standard/Legislation is being added, the "Add Standard/Legislation" screen will appear.

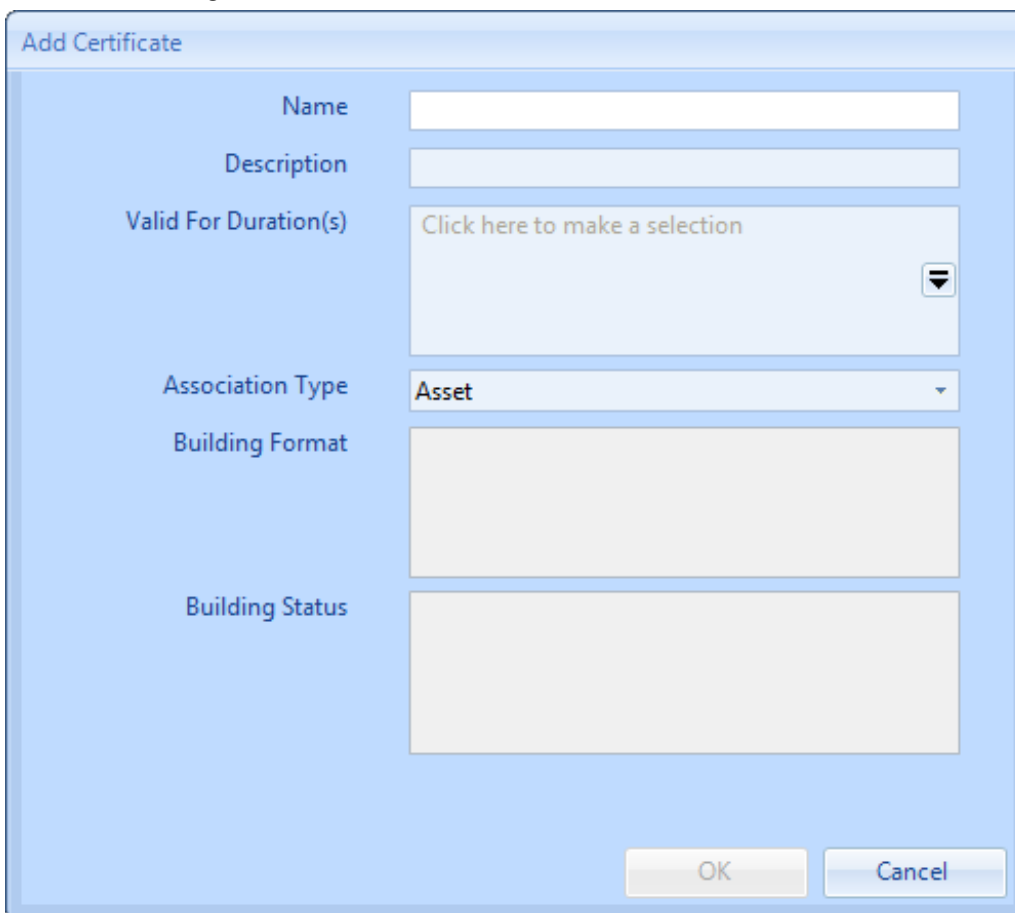
Provide the “Name” and “Description” of the new Legislation as well its “Type”, “Revision Date” and its “Valid From” date. A “Valid To” date may also be provided if necessary. Click on “OK” to commit the information.



The "Add Standard / Legislation" dialog box contains the following fields and controls:

- Name:** A text input field.
- Description:** A text input field.
- Type:** A dropdown menu with "Standard" selected.
- Revision Date:** A date picker showing "14 January 2013".
- Valid From:** A date picker showing "2013".
- Valid To:** A date picker with a checkbox and a date showing "1900".
- Status:** A dropdown menu with "Current" selected.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

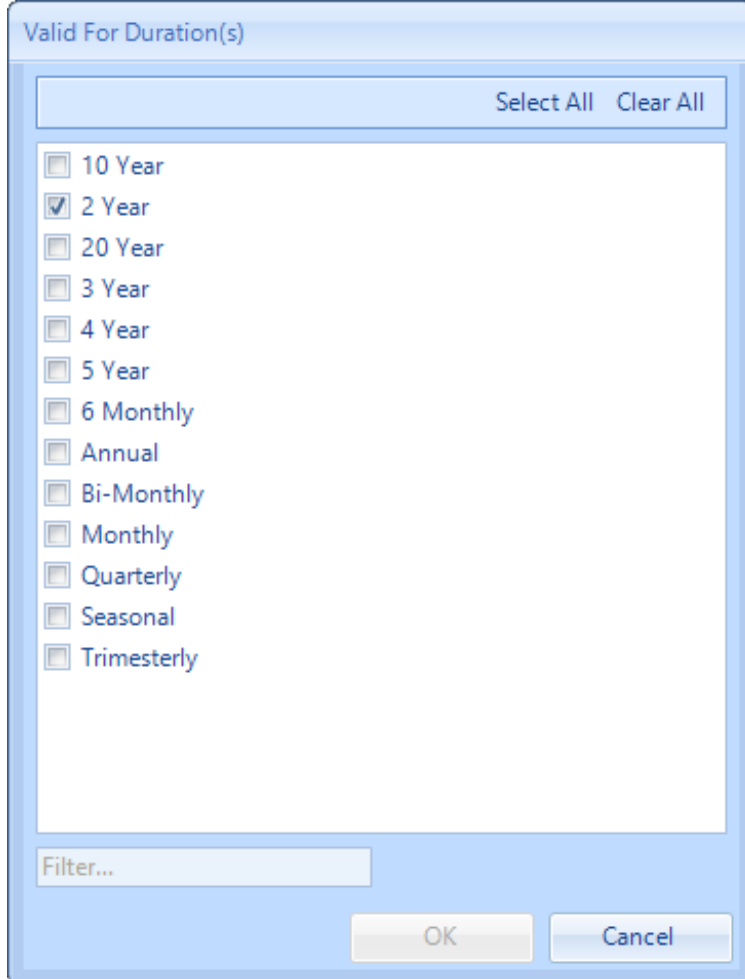
5. If a Certificate is being added, the “Add Certificate” screen will appear. Provide the “Name” and “Description” of the new certificate as well its “Association Type”. If an "Association Type" of "Building" is selected, the "Building Format" and "Building Status" fields will be enabled where the relative Building information can be selected.



The "Add Certificate" dialog box contains the following fields and controls:

- Name:** A text input field.
- Description:** A text input field.
- Valid For Duration(s):** A dropdown menu with the text "Click here to make a selection" and a downward arrow.
- Association Type:** A dropdown menu with "Asset" selected.
- Building Format:** A text input field, currently disabled.
- Building Status:** A text input field, currently disabled.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

6. Clicking on the drop down arrow on the "Valid For Duration(s)" allows the user to select one/all frequencies that will apply to this certificate.

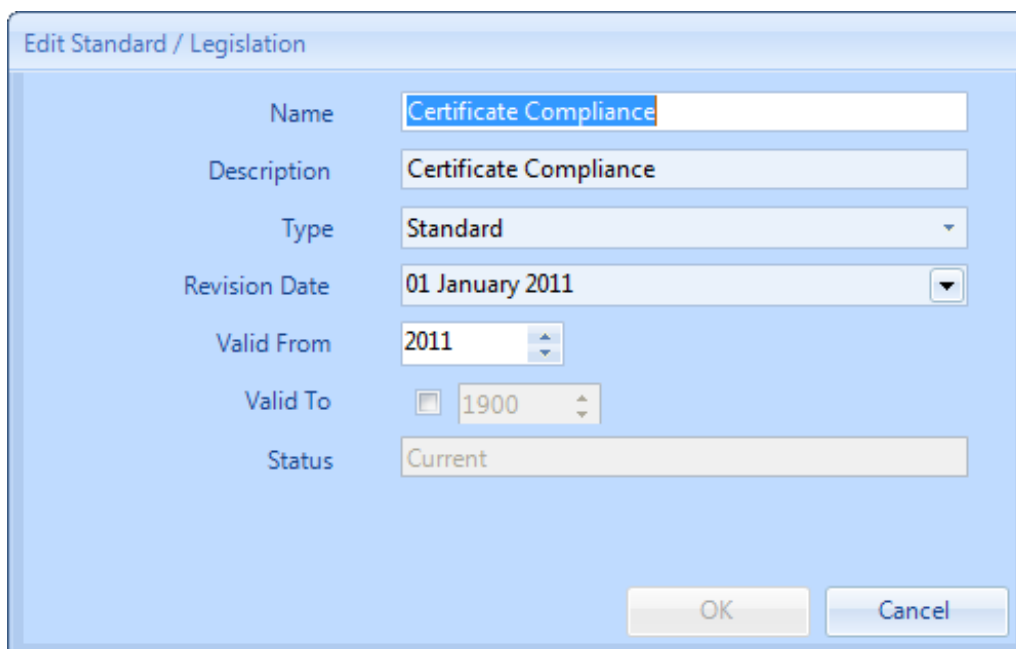


A dialog box titled "Valid For Duration(s)" with a light blue border. At the top right, there are two buttons: "Select All" and "Clear All". Below these is a list of duration options, each preceded by a checkbox. The "2 Year" option is selected with a checkmark. At the bottom left, there is a text input field labeled "Filter...". At the bottom right, there are two buttons: "OK" and "Cancel".

Duration	Selected
10 Year	<input type="checkbox"/>
2 Year	<input checked="" type="checkbox"/>
20 Year	<input type="checkbox"/>
3 Year	<input type="checkbox"/>
4 Year	<input type="checkbox"/>
5 Year	<input type="checkbox"/>
6 Monthly	<input type="checkbox"/>
Annual	<input type="checkbox"/>
Bi-Monthly	<input type="checkbox"/>
Monthly	<input type="checkbox"/>
Quarterly	<input type="checkbox"/>
Seasonal	<input type="checkbox"/>
Trimesterly	<input type="checkbox"/>

7. Clicking "OK" will return the user to the previous screen. Click on "OK" to commit the information.

8. Items in the list can also be edited. Depending on whether a "Standard/Legislation" or a "Certificate" is being updated, the "Edit Standards/Legislation" or "Edit Certificate" screen will appear. The Edit screens work in the same way as the Add screens and require all the necessary information for the different items.



A dialog box titled "Edit Standard / Legislation" with a light blue border. It contains several form fields for editing an item. At the bottom right, there are two buttons: "OK" and "Cancel".

Name	Certificate Compliance
Description	Certificate Compliance
Type	Standard
Revision Date	01 January 2011
Valid From	2011
Valid To	<input type="checkbox"/> 1900
Status	Current

9. Once all the changes have been made, click "Save" to apply them.

Note: Setting an Association Type to Building means any Certificate requirements will apply to the

whole Building. For example, this could be used for PAT Testing - where the User would not necessarily individually asset tag every electrical item being PAT tested. Association Type of Asset means any Certificate requirements would be on a per Asset basis, for example Thorough Lift Inspections should be of Association Type Asset to ensure the User receives a Certificate per Asset.

Selecting multiple durations for certificates allows varying frequencies for certificates to be added to PPM tasks on a contract.

It is possible to set a Certificate Tolerance (please contact your Ostara System Administrator to arrange for this setting to be turned on) which results in the placement of a message on the portal (the Work Order Detail Page), below the finance and visit dates of "Tolerance": with the message of "Attendances of up to 'x' days after the Visit End Date are acceptable for this Work Order."

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=19>