

Generating PPM Work Orders

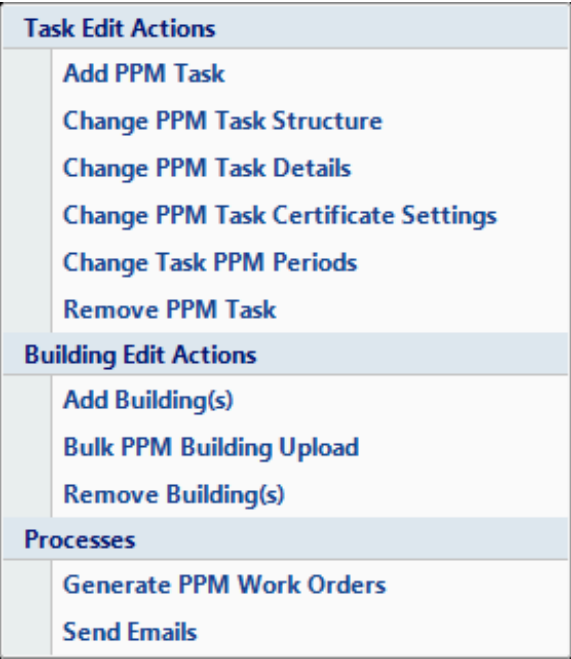
Introduction

When creating a contract, if the user has selected that the PPMs on this work order are generated manually then the following steps will need to be done to create these work orders:

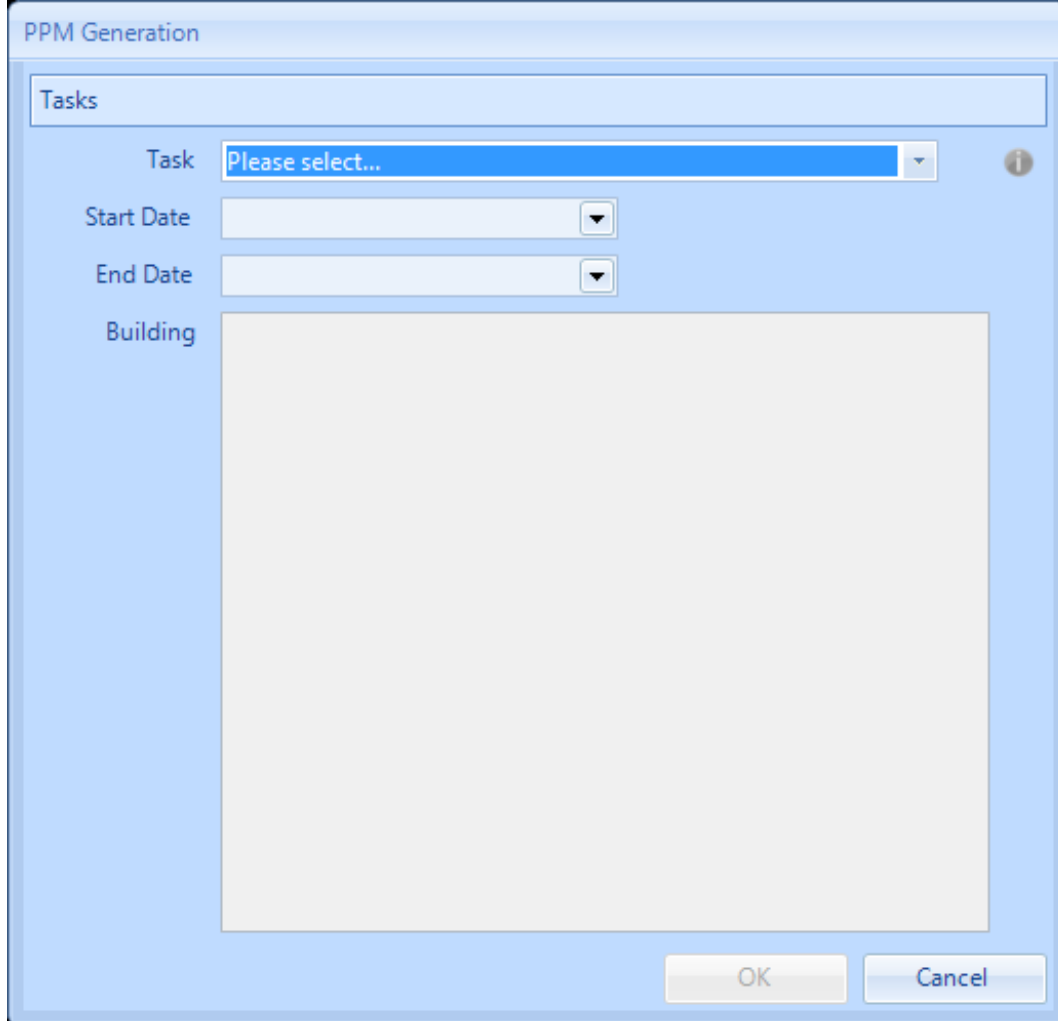
1. To generate PPM work orders click the Edit Actions button.



2. This menu will be displayed:



3. Click on the Generate PPM Work Orders menu option. This screen will then open:

The image shows a software dialog box titled "PPM Generation". It has a light blue border and a white background. At the top, there is a tab labeled "Tasks". Below the tab, there are four input fields: "Task" with a dropdown menu showing "Please select..." and a small information icon to its right; "Start Date" with a date picker; "End Date" with a date picker; and "Building" with a large, empty rectangular area for selection. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

4. Select the task that will have PPMs Work Orders generated for by selecting from the drop down list.
5. Select a start date. **Note:** the financial start and end dates for the PPM need to fall within the start and end dates.
6. Select an end date. **Note:** the financial start and end dates for the PPM need to fall within the start and end dates.
7. Select any/all Building(s) that require the PPMs generating by selecting from the list provided.
8. Once selecting all the relevant details, click on the OK button. A list of potential Work Orders will be displayed:

Potential work orders

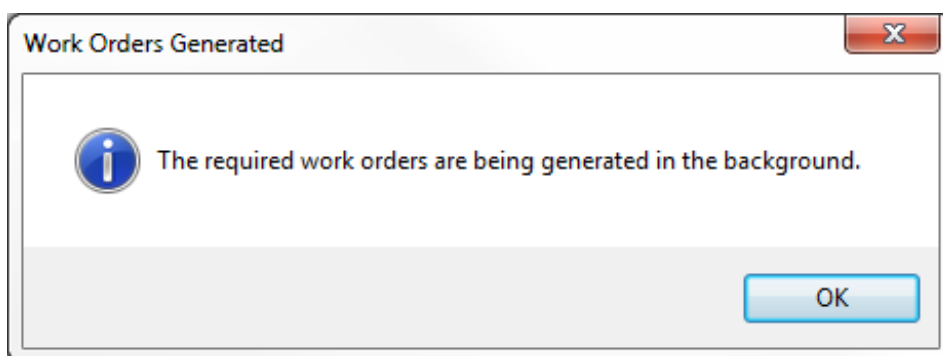
Work Orders Select All Clear All Select All Filter

	Description	Building Name	Financial Start	Financial End	Visit Start	Visit End	Invoice Value	Invoice	Visit
<input type="checkbox"/>	Filter...	Filter...					Filter...	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Hand/Face Dryer, Paper Towel Dispens...	77777 - Park West (Temp)	09/05/2013	08/06/2013	09/05/2013	08/06/2013	£0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Hand/Face Dryer, Paper Towel Dispens...	77777 - Park West (Temp)	09/06/2013	08/07/2013	09/06/2013	08/07/2013	£0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Hand/Face Dryer, Paper Towel Dispens...	77777 - Park West (Temp)	09/07/2013	08/08/2013	09/07/2013	08/08/2013	£400.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Hand/Face Dryer, Paper Towel Dispens...	77777 - Park West (Temp)	09/08/2013	08/09/2013	09/08/2013	08/09/2013	£0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

9. The first "generate" column is ticked by default but does allow the de-selection by the User.

10. Once the User is happy to proceed with the PPM generation click the OK button. The following information message will be displayed:



Please Note: Work Orders will generate in the background and should appear in the system within approximately fifteen minutes of performing these steps. Manual generation is possible, even if Automatic Generation is on for the Contract.

Emailing PPM Work Orders

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=193>