Generating PPM Work Orders Introduction

💾 Wed, Jan 17, 2024 🛛 🖿 Generating PPM Work Orders

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:

Task Edit Actions						
	Add PPM Task					
	Change PPM Task Structure					
	Change PPM Task Details					
	Change PPM Task Certificate Settings					
	Change Task PPM Periods					
	Remove PPM Task					
Building Edit Actions						
	Add Building(s)					
	Bulk PPM Building Upload					
	Remove Building(s)					
Pr	Processes Generate PPM Work Orders					
	Send Emails					

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



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 Filt									t All Filter	
		Description	Building Name	Financial Start	Financial End	Visit Start	Visit End	Invoice Value	Invoice	Visit	
		Filter	Filter					Filter			
	V	Hand/Face Dryer, Paper Towel Dispens	77777 - Park West (Temp)	09/05/2013	08/06/2013	09/05/2013	08/06/2013	£0.00			
	V	Hand/Face Dryer, Paper Towel Dispens	77777 - Park West (Temp)	09/06/2013	08/07/2013	09/06/2013	08/07/2013	£0.00		V	
	V	Hand/Face Dryer, Paper Towel Dispens	77777 - Park West (Temp)	09/07/2013	08/08/2013	09/07/2013	08/08/2013	£400.00			
	V	Hand/Face Dryer, Paper Towel Dispens	77777 - Park West (Temp)	09/08/2013	08/09/2013	09/08/2013	08/09/2013	£0.00			
OK								Cancel			
								L			

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:

Work Orders Generated	×
The required work orders are being generated in the backg	round.
	ОК

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

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