

# PPMs Tab - Add PPM Task(s)

Wed, Jan 17, 2024 Contract Actions

Adding a new PPM Task is achieved from the PPMs Tab. This tab will show the User all of the PPM Tasks and which Buildings they apply to. The screenshot below shows some that have already been set up:

PPM Tasks

RefreshView ActionsEdit Actions

Equipment/Service Type	Invoice Frequency	Invoice Value	Site Value
Goods Lift, Less Abled Lift, Passenger Lift, Monitoring and Lift Entrapment, Comprehensive	Monthly	£0.00	£0.00
Goods Lift, Less Abled Lift, Passenger Lift, Monitoring and Lift Entrapment, PPM - Due Diligence Major	None	£0.00	£0.00
Goods Lift, Less Abled Lift, Passenger Lift, Monitoring and Lift Entrapment, Scheduled Cost	Monthly	£0.00	£0.00
Passenger Lift, PPM - Legislative Inspection	None	£0.00	£0.00

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Buildings (420 items selected)

View ActionsEdit Actions

Name	Client	Number	Start Date	End Date	Current	Invoice Frequency	Invoice Value	Site Value	Grouping 1	Grouping 2	Grouping 3
Filter...	Filter...	Filter...				Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
(06404) Birmingham Fort Dunlop	Dr Explain	06404	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	CENTRAL AND...	Birmingham	Birmingham
(01200) Manchester, Market Street	Dr Explain	01200	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	Greater Manch...	Greater Manch...
(00080) Kettering	Dr Explain	00080	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	CENTRAL AND...	Bucks/Bedford...	Bucks/Bedford...
(01481) Warrington, Golden Square	Dr Explain	01481	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	Merseyside	Merseyside
(06435) York	Dr Explain	06435	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	Teeside and N...	Teeside and N...
(00821) Watford	Dr Explain	00821	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	SOUTH	Middlesex and ...	Middlesex and ...
(00675) Aberdeen Bon Accord Centre	Dr Explain	00675	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	North of Scotl...	North of Scotl...
(06053) Aberdeen Union Street	Dr Explain	06053	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	North of Scotl...	North of Scotl...
(00670) Arbroath	Dr Explain	00670	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	North of Scotl...	North of Scotl...
(00645) Oban	Dr Explain	00645	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	NORTH	North of Scotl...	North of Scotl...
(06407) Bedford Interchange Rp	Dr Explain	06407	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	CENTRAL AND...	Bucks/Bedford...	Bucks/Bedford...
(00459) Newbury	Dr Explain	00459	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	CENTRAL AND...	Thames Valley	Thames Valley
(06493) Newbury	Dr Explain	06493	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	CENTRAL AND...	Thames Valley	Thames Valley
(00340) Porthcawl	Dr Explain	00340	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	CENTRAL AND...	Wales	Wales
(00243) Bristol	Dr Explain	00243	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	SOUTH	Bristol and Wil...	Bristol and Wil...
(00336) Clifton	Dr Explain	00336	01/05/2012	30/04/2013	<input checked="" type="checkbox"/>	None	£0.00	£0.00	SOUTH	Bristol and Wil...	Bristol and Wil...

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1. To add a new PPM task click on the "Edit Actions" button.

PPM Tasks	View Actions	Edit Actions
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2. This menu will be displayed:

Task Edit Actions	
	<b>Add PPM Task</b> Change PPM Task Structure No PPM tasks are associated. Change PPM Task Details No PPM tasks are associated. Change PPM Task Certificate Settings No PPM tasks are associated. Change Task PPM Periods No PPM tasks are associated. Remove PPM Task No PPM tasks are associated.
Building Edit Actions	
	<b>Add Building(s)</b> No PPM tasks are associated. <b>Bulk PPM Building Upload</b> No PPM tasks are associated. <b>Remove Building(s)</b> No PPM tasks are associated.
Processes	
	<b>Generate PPM Work Orders</b> No PPM tasks are associated. <b>Send Emails</b> No PPM tasks are associated.

3. Click on the "Add PPM Task" menu option. The User will then be presented with this screen:

**Add PPM Task**

Short Name

Equipment / Service ☐ Equipment ☐ Comprehensive Equipment  
☐ Service ☐ Comprehensive Service

Reason

Is Damage Included? ☐ ?

Find... << >> Select All Clear All

Primary WO Type

Allow Critical Remedial Works ☐ ?

OK Cancel

4. Enter the Short Name description for the PPM Task.

5. Select whether or not the PPM task is for Equipment or Comprehensive Equipment, Service or Comprehensive Service.

**Note:** the screen shot above is for a "Pay as you go" contract. If the contract was a "Comprehensive" contract the comprehensive equipment/service radio buttons will be active. The User will only be able to select Equipment or Service if there are Equipment and/or Service Types available within the contract  
The quick search option can be used to locate the work order types more easily.

6. Use the drop down to select from a pre-defined list of PPM reason for completing these PPMs. This includes, but is not limited to, Legislative Inspection, Due Diligence Inspection, Major and Minor PPMs and Reliability Based PPMs.

7. Is Damage included? - this should be ticked if the User would like Misuse and Abuse to be included as part of a "Comprehensive" contract (this will only be applicable on a comprehensive task when the Contract is fully comprehensive for Reactive and PPM purposes)

8. Tick all the Work Order Types and Equipment/Service Types which the resource is required to complete within this particular PPM.

9. When multiple Work Order Types are selected, it is required to select a Primary Work Order Type. Any cost codes associated to the Primary Work Order Type will be used for any Financial reporting requirements on the Work Orders generated.

10. Tick "Allow Critical Remedial Works" to allow Parts to be added to a PPM upon completion. This will automatically create a remedial Work Order with the Parts on. Hover the ? for more information.

11. Once completed click on the OK button and the [Reason for Contract Change](#) window will open

12. Confirming the reason for the contract change will add the PPM Task for the task type(s) selected.

**Note:** If a "Comprehensive" PPM Task exists and there are specific Equipment/Services associated to it, a new "Comprehensive" task cannot be created with those Equipment/Service Types.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=215>