## 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									Refresh	✓ View Actions	Edit Actions	
Equipment/Service Type								Invoid	e Frequency Inv	oice Value Si	te Value	
Goods Lift, Less Abled Lift, Passenger Lift, N	ols Lift, Less Abled Lift, Passenger Lift, Monitoring and Lift Entrapment, Comprehensive Monthl								hly £0	00 £	).00	
Goods Lift, Less Abled Lift, Passenger Lift, Monitoring and Lift Entrapment, PPM - Due Diligence Major									£0	00 £	0.00	
Goods Lift, Less Abled Lift, Passenger Lift, Monitoring and Lift Entrapment, Scheduled Cost								Mont	hly £0	00 £	0.00	
Passenger Lift, PPM - Legislative Inspection	1							None	None £0.00 £0.00			
Buildings (420 items selected)												
Name	Client	Number	Start Date	End Date	Current	Invoice Frequency	Invoice Value	Site Value	Grouping 1	Grouping 2	Groupi 🔺	
Filter	Filter	Filter				Filter	Filter	Filter	Filter	Filter	Filter	
(06404) Birmingham Fort Dunlop	Dr Explain	06404	01/05/2012	30/04/2013	V	None	£0.00	£0.00	CENTRAL AN	D Birmingham	Birmin	
(01200) Manchester, Market Street	Dr Explain	01200	01/05/2012	30/04/2013		None	£0.00	£0.00	NORTH	Greater Manc	n Greate	
(00080) Kettering	Dr Explain	00080	01/05/2012	30/04/2013	V	None	£0.00	£0.00	CENTRAL AN	D Bucks/Bedfor	d Bucks/	
(01481) Warrington, Golden Square	Dr Explain	01481	01/05/2012	30/04/2013	V	None	£0.00	£0.00	NORTH	Merseyside	Mersey	
(06435) York	Dr Explain	06435	01/05/2012	30/04/2013	<b>V</b>	None	£0.00	£0.00	NORTH	Teeside and N	I Teesid	
(00821) Watford	Dr Explain	00821	01/05/2012	30/04/2013	<b>V</b>	None	£0.00	£0.00	SOUTH	Middlesex and	I Middle	
(00675) Aberdeen Bon Accord Centre	Dr Explain	00675	01/05/2012	30/04/2013	V	None	£0.00	£0.00	NORTH	North of Scot	North	
(06053) Aberdeen Union Street	Dr Explain	06053	01/05/2012	30/04/2013	V	None	£0.00	£0.00	NORTH	North of Scot	Gramp	
(00670) Arbroath	Dr Explain	00670	01/05/2012	30/04/2013	<b>V</b>	None	£0.00	£0.00	NORTH	North of Scot	Gramp	
(00645) Oban	Dr Explain	00645	01/05/2012	30/04/2013	<b>V</b>	None	£0.00	£0.00	NORTH	North of Scot	Highla	
(06407) Bedford Interchange Rp	Dr Explain	06407	01/05/2012	30/04/2013	V	None	£0.00	£0.00	CENTRAL AN	D Bucks/Bedfor	d Bucks/	
(00459) Newbury	Dr Explain	00459	01/05/2012	30/04/2013		None	£0.00	£0.00	CENTRAL AN	D Thames Valle	/ Thame	
(06493) Newbury	Dr Explain	06493	01/05/2012	30/04/2013	<b>V</b>	None	£0.00	£0.00	CENTRAL AN	D Thames Valle	/ West E	
(00340) Porthcawl	Dr Explain	00340	01/05/2012	30/04/2013	V	None	£0.00	£0.00	CENTRAL AN	D Wales	Swans	
(00243) Bristol	Dr Explain	00243	01/05/2012	30/04/2013		None	£0.00	£0.00	SOUTH	Bristol and Wi	I Bristol	
(00336) Clifton	Dr Explain	00336	01/05/2012	30/04/2013		None	£0.00	£0.00	SOUTH	Bristol and Wi	I South 🚽	
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1. To add a new PPM task click on the "Edit Actions" button.

PPM Tasks

✓ View Actions ✓ Edit Actions

2. This menu will be displayed:

Та	Task Edit Actions					
	Add PPM Task					
	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.					
Bu	Building Edit Actions					
	Add Building(s) No PPM tasks are associated.					
	Bulk PPM Building Upload No PPM tasks are associated.					
	Remove Building(s) No PPM tasks are associated.					
Pro	Processes					
	Generate PPM Work Orders No PPM tasks are associated.					
	Send Emails 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 O Comprehensive Equipment	
	○ Service ○ Comprehensive Service	
Reason		-
Is Damage Included?		
Find	« » Select Al	I Clear All
Primary WO Type		Ψ.
Allow Critical Remedial Works		
	ОК	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.

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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.

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