PPMs Tab - Change PPM Periods

💾 Wed, Jan 17, 2024 🛛 🖿 Contract Actions

A User can change the Invoice or Frequency of Visits against a PPM Task when Work Orders have not been generated, or where there are Work Orders but only if the overall period count doesn't change.

To change/add a PPM task period the User will need to highlight the PPM Task that they wish to change/add and then click the "Edit Actions" button.

2. This menu will be displayed:



3. Click on the "Change Task PPM Periods" menu option. This screen will then open:

Change PPM Task Periods									
Equipme	ent Task between	22/04	/2013 and 21/	/04/2014					
Frequ	ency of Visits	None			•				
I	invoice Count	None			Ŧ				
1	Invoice Value	£0.00)						
	Site Value	£0.00							
Visits / I	invoices								
F	Financial Start		Financial End	Visit Start	Visit End	Inv	Closed		
					OK		Cancel		
					UK		Cancel		

4. Select the Frequency of PPM visits by clicking on the drop down arrow.

5. If the User wishes to define their own frequency this can be done by selecting "Seasonal" from the drop down. The Edit Seasonal Finance Periods button will appear:

6. Click on Edit Seasonal Visits. This window will then open:

E	dit Cust	com PPM Periods						
	Period	s	Add (Copy Before	Сору А	fter	Delete	
		Start	End					
				ОК		Car	ncel	

7. Click on the Add button. The Date Selection window will open:

Date Selection		
Start	09 July 2013	•
End	09 August 2013	•
	ОК	Cancel

8. The Start Date defaults to the contract start date and the end date defaults to the start date plus a month. Select the Start and End dates as desired and click OK (please note: the start date cannot be less than the contract start date and the end date cannot be greater than the end date of the contract).

9. The User can then choose to either copy before, copy after, add or delete a period. Copy Before and Copy After - copies the period length either before or after the date highlighted

Add - will add another period allowing the User to define the start and end periods (as above) Delete - will delete the highlighted period

10. Once all the visit dates have been set click on the OK button. Below is an example of periods that have been set for 6 weekly visits (**Note:** As an annual contract cannot be equally divided into 6 weekly visits, the last period will be shorter than the rest and this is then remainder of days left after the other 6 weekly visits have been set):

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Freq	Invoice Count Invoice Value Site Value	Seasonal None £0.00 £0.00				
/ISITS /	Einensiel Start		Einensiel End	Minit Chart	Visit End	Tance Periods
1	00/07/2012		23/08/2012	00/07/2012	23/08/2012	INV
2	24/08/2013		08/10/2013	24/08/2013	08/10/2013	
3	09/10/2013		23/11/2013	09/10/2013	23/11/2013	
4	24/11/2013		08/01/2014	24/11/2013	08/01/2014	
5	09/01/2014		23/02/2014	09/01/2014	23/02/2014	
6	24/02/2014		10/04/2014	24/02/2014	10/04/2014	
7	11/04/2014		26/05/2014	11/04/2014	26/05/2014	
8	27/05/2014		08/07/2014	27/05/2014	08/07/2014	

11. Select the Frequency of Invoices by clicking on the drop down arrow. This can differ to the number of visits. If the Invoice Count is greater than the Frequency of Visits the system will determine the number of Work Orders created. The other Work Orders will be raised as closed and will be generated for invoice purposes only. See screen shot below for an example of this: (**Note:** if seasonal has been selected the invoice count can only be set to "None" or "Seasonal". When choosing "Seasonal" the invoice frequency will be set to same visit start/end dates)

Change PPM Task Periods										
Equip	Equipment Task between 22/04/2013 and 21/04/2014									
Frequency of Visits Quarterly										
Invoice Count Monthly -										
Invoice Value £100.00										
Site Value £1,200.00										
Visits	Visits / Invoices									
	Financial Start		Financial End	Visit Start	Visit End	Inv	Closed			
▶ 1	22/04/2013		21/05/2013	22/04/2013	21/05/2013	V				
2	22/05/2013		21/06/2013			V	V			
3	22/06/2013		21/07/2013				V			
4	22/07/2013		21/08/2013	22/07/2013	21/08/2013	V				
5	22/08/2013		21/09/2013			V	V			
6	22/09/2013		21/10/2013			V	V			
7	22/10/2013		21/11/2013	22/10/2013	21/11/2013	V				
8	22/11/2013		21/12/2013			V	V			
9	22/12/2013		21/01/2014			V	V			
10	22/01/2014		21/02/2014	22/01/2014	21/02/2014					
11	22/02/2014		21/03/2014			V	V			
12	22/03/2014		21/04/2014			\checkmark				
	OK Cancel									

12. After the Frequency of Visits have been set enter the value expected for each Invoice - this will then calculate the total cost for each Building based upon the number of invoices and the invoice cost.

Note: if the Invoice Count is set to 0, it is not possible to enter in a Site Value as the Site Value is the total cost of all the Invoices on the Contract.

13. Once the PPMs have been generated the User will no longer be able to make any changes to this screen apart from the invoice value.

14. Once the periods and values have been set click on the OK button. This message will then appear:

Building Replication	APR 183	X
Do you want to apply yo	ur changes to any associated	buildings?
	Yes	No

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15. For the changes to apply to any of the associated Buildings, click "Yes". If not then clicking on the "No" button will only apply these changes at PPM Task level and no Buildings will be affected.

16. After clicking the "Yes" button the User will be presented with a list of Building that these can be applied to.

Change PPM Task Periods								
424	424 available buildings, 424 filtered buildings, 0 selected building Bulk Select All Clear All Select All Filter Clear All Filter							
	Name	Number	Start Date	End Date	Invoice Frequency	Invoice Value	Site Value	Groupir 🔺
	Filter	Filter			Filter	Filter	Filter	Filter 🗉
	(00005) Beeston	00005	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00006) Nottingham Victoria Centre	00006	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00010) Nottingham	00010	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00012) Mansfield	00012	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00020) Loughborough	00020	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00023) Derby	00023	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00026) Ilkeston	00026	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00031) Lincoln	00031	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH
	(00052) Rotherham	00052	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00055) Chesterfield	00055	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00056) Sheffield	00056	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00057) Hillsborough	00057	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00061) Sheffield Meadowhall Centre	00061	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00074) Hinckley	00074	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00075) Market Harborough	00075	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00080) Kettering	00080	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR.
	(00084) Northampton	00084	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00085) Cambridge	00085	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00086) Bury St Edmunds	00086	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00092) Cannock	00092	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00098) Lerwick	00098	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH
	(00101) Grimsby	00101	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH
	(00107) Kingsthorpe	00107	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
	(00109) Skegness	00109	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH *
							ОК	Cancel

17. From here Users can perform various activities including Bulk Select, Select All, Clear All, Select All Filtered, Clear All Filtered and Select Not Filtered.

18. Use the Select All or Clear All buttons to to select/deselect the entire list.

19. If the User has filtered the list of Buildings, clicking on the Select All Filtered or Clear All Filtered will select/deselect all of the filtered Buildings.

20. Selecting all the Buildings not filtered can be done by clicking on the Select Not Filtered button.

21. Alternatively each Building can be selected individually by clicking on the tick box on the left hand side of the window.

22. Click here for further information on bulk importing of Buildings.

23. Once all of the Buildings required have been selected click on the OK button and the Reason for Contract Change window will open

24. Confirming the reason for the contract change will apply the changes made to the <u>Powred by PHPKB</u> (Knowledge Base Software) Buildings selected.

Please Note: That although Visit Start and End Dates can be applied here and will update any previously generated Work Orders, on Certificate Upload or a Stop Job is performed on a PPM Work Order, future PPM Visit Dates are updated on the

Contract based on Certificate expiry to ensure compliance is maintained.

Visit updates are not scheduled in the following circumstances:

- the work order is not a PPM

- the work order is not completed

- at least one certificate has not been added (when there is more than one asset that requires more than one certificate)

- the work order is pending certificates (including when a failed certificate has been uploaded)

- the work order is an orphaned PPM (i.e. the related PPM building has been removed from the contract)

- the "Valid From" date is outside the range of the contract period

- the PPM building is set to weekly visits

- the contract period length in months is not 1, 2, 3, 4, 6, or 12

- the PPM building visit structure is not monthly, bi-monthly, quarterly, trimesterly, six-monthly or annually

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=218