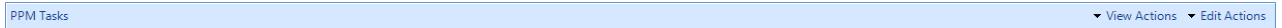


# PPMs Tab - Change PPM Periods

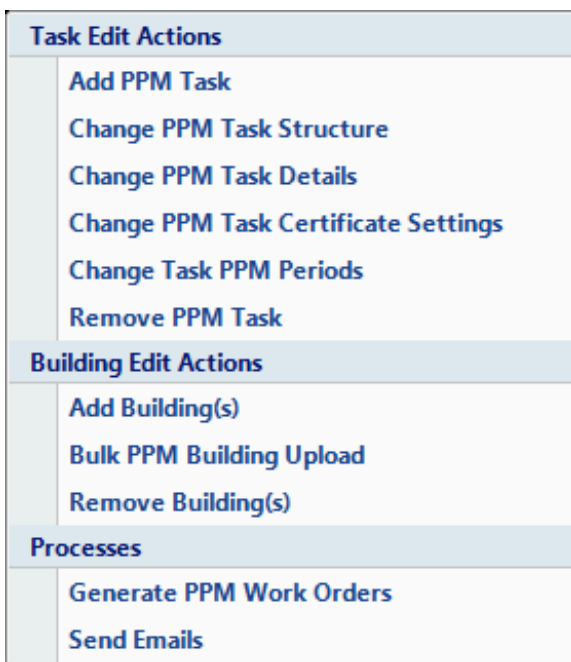
Wed, Jan 17, 2024 Contract Actions

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.

1. 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

Equipment Task between 22/04/2013 and 21/04/2014

Frequency of Visits:

Invoice Count:

Invoice Value:

Site Value:

Visits / Invoices

Financial Start	Financial End	Visit Start	Visit End	Inv	Closed

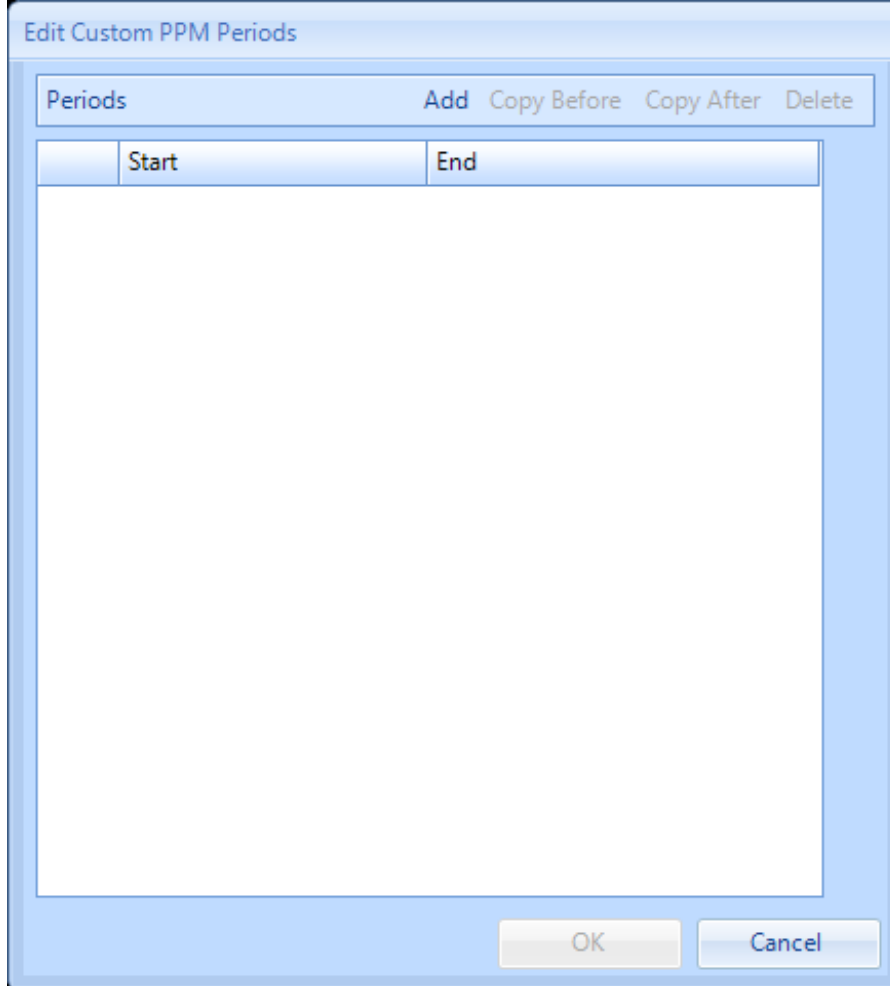
OK Cancel

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

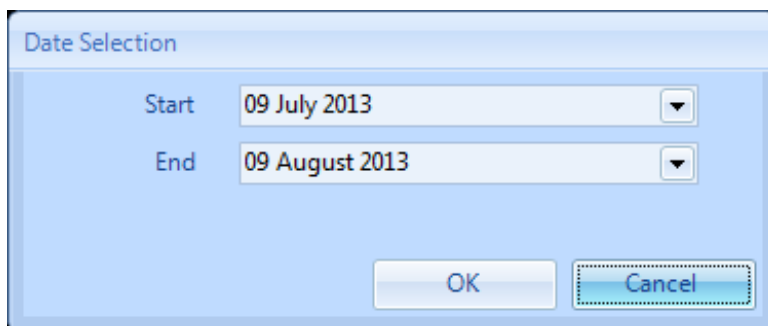
5. If the User wishes to define their own frequency this can be done by selecting "Seasonal" from the drop down. The Edit Seasonal Finance Periods button will appear:

Visits / Invoices Edit Seasonal Finance Periods

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



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



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):

Change PPM Task Periods

Equipment Task between 09/07/2013 and 08/07/2014

Frequency of Visits: Seasonal

Invoice Count: None

Invoice Value: £0.00

Site Value: £0.00

Visits / Invoices Edit Seasonal Finance Periods

	Financial Start	Financial End	Visit Start	Visit End	Inv
▶ 1	09/07/2013	23/08/2013	09/07/2013	23/08/2013	<input type="checkbox"/>
2	24/08/2013	08/10/2013	24/08/2013	08/10/2013	<input type="checkbox"/>
3	09/10/2013	23/11/2013	09/10/2013	23/11/2013	<input type="checkbox"/>
4	24/11/2013	08/01/2014	24/11/2013	08/01/2014	<input type="checkbox"/>
5	09/01/2014	23/02/2014	09/01/2014	23/02/2014	<input type="checkbox"/>
6	24/02/2014	10/04/2014	24/02/2014	10/04/2014	<input type="checkbox"/>
7	11/04/2014	26/05/2014	11/04/2014	26/05/2014	<input type="checkbox"/>
8	27/05/2014	08/07/2014	27/05/2014	08/07/2014	<input type="checkbox"/>

OK Cancel

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

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 / Invoices

	Financial Start	Financial End	Visit Start	Visit End	Inv	Closed
▶ 1	22/04/2013	21/05/2013	22/04/2013	21/05/2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	22/05/2013	21/06/2013			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	22/06/2013	21/07/2013			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	22/07/2013	21/08/2013	22/07/2013	21/08/2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	22/08/2013	21/09/2013			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	22/09/2013	21/10/2013			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	22/10/2013	21/11/2013	22/10/2013	21/11/2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	22/11/2013	21/12/2013			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	22/12/2013	21/01/2014			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	22/01/2014	21/02/2014	22/01/2014	21/02/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	22/02/2014	21/03/2014			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12	22/03/2014	21/04/2014			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

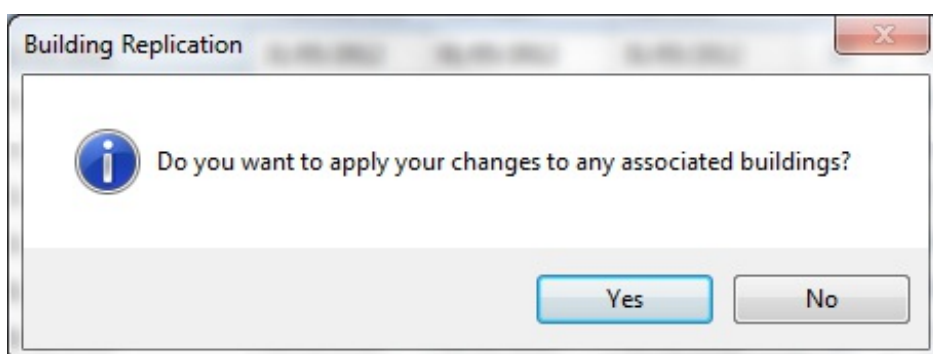
OK Cancel

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:



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.

	Name	Number	Start Date	End Date	Invoice Frequency	Invoice Value	Site Value	Group
<input type="checkbox"/>	(00005) Beeston	00005	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00006) Nottingham Victoria Centre	00006	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00010) Nottingham	00010	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00012) Mansfield	00012	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00020) Loughborough	00020	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00023) Derby	00023	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00026) Ilkeston	00026	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00031) Lincoln	00031	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH
<input type="checkbox"/>	(00052) Rotherham	00052	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00055) Chesterfield	00055	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00056) Sheffield	00056	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00057) Hillsborough	00057	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00061) Sheffield Meadowhall Centre	00061	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00074) Hinckley	00074	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00075) Market Harborough	00075	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00080) Kettering	00080	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00084) Northampton	00084	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00085) Cambridge	00085	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00086) Bury St Edmunds	00086	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00092) Cannock	00092	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00098) Lerwick	00098	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH
<input type="checkbox"/>	(00101) Grimsby	00101	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH
<input type="checkbox"/>	(00107) Kingsthorpe	00107	01/05/2012	30/04/2013	None	£0.00	£0.00	CENTR
<input type="checkbox"/>	(00109) Skegness	00109	01/05/2012	30/04/2013	None	£0.00	£0.00	NORTH

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 [Powred by PHPKB](#) (Knowledge Base Software)

**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

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