## PPMs Tab - Change PPM Task Details

## 💾 Wed, Jan 17, 2024 🛛 🖿 Contract Actions

1. To change the PPM task details the User will need to highlight the PPM Task that they wish to change and then click the "Edit Actions" button.

✓ View Actions ✓ Edit Actions

2. This menu will be displayed:

PPM Tasks

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)		
Processes			
	Generate PPM Work Orders		
	Send Emails		

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

Change PPM Task Details			
Equipment Task between 01/12/2016 and 30/11/2017			
Short Name	A short descriptive name for the PPM Task		
Association Type	None *		
RFI Association	Currently no RFIs selected		
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Auto Close Work Orders?	0	days after the Financial End Date	
Frequency of Visits	None		
Dynamic Date Updates Supported?	No	0	
Exclude from Dynamic Date Updates			
Estimated Work Order Duration	<b>4.0</b>	hours	
Auto Generate From	<ul> <li>01 July 2017</li> </ul>	0	
Auto Send List Email On Generation?	☑ @		
Maximum Work Order Value	🖻 £0.00	0	
Maximum Work Order Count	0 ‡	0	
Notes			
Instructions			
		OK Cancel	

4. The Short Name field is a Mandatory field and allows the User to specify an abbreviated name for the PPM Task. This Short Name will then appear in place of the concatenated Equipment/Service Type PPM Task name. The areas this short name appears in are listed at the bottom of this page.

5. The Association Type field allows the User to select if Assets are associated with this Contract and if so, whether they are Specified by the User or Derived from that Building.

6. RFI Association field allows the User to associate an RFI against this PPM task. Click on the drop down arrow, if no RFIs have been set up for the task types and Buildings selected a pop up box will appear stating no relevant RFIs were found.

7. Auto Close Work Orders? allows the User to specify how many days past the Financial End Date should the PPM Work Order automatically close. Setting this to zero results in PPMs automatically closing as "Not Done" (status 5.28) once the Financial End Date has passed.

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8. Frequency of Visits is for information purposes only and provides a textual representation of the visit frequency of the current PPM Task.

9. Dynamic Date Updates Supported? indicates whether this particular task can have Dynamic Date Updates applied to it. Weekly, Fortnightly, Monthly and Seasonal Frequencies are excluded from Dynamic Date updates.

10. The Exclude from Dynamic Dates Updates tick box determines whether the Visit Dates on the PPM Task will be dynamically updated depending on the dates of the Certificate on the previous Work Order. To exclude this PPM Task from Dynamic Dating, tick this box. Dynamic Dating will only apply to PPM Tasks whose frequencies allow for simple division into an annual Contract and allow thirty day windows. i.e. Dynamic Dating is not available on Weekly, Fortnightly, Monthly or Seasonal PPM Task frequencies.

11. Estimated Work Order Duration allows for the specification of a standard duration expected for this particular PPM Task. This is used in the Resource Planner to ensure that the duration of the PPM is accurately reflected on the calendar.

12. Auto Generate From allows for the specification of a date from which to begin the generation of PPMs. This is especially useful if the Contract started on a date prior to the addition of this particular PPM task and allows for this PPM Task to begin part way through a Contract Period. This avoids unnecessary generation and cancellation of historic PPM Work Orders.

13. Auto Send List Email on Generation? is a tick box that allows the User to specify that on generation of the PPM Work Orders, an email with the CSV attachment generated from the Send Emails action will be sent to the relevant Resource Contacts. This can be used for 'Invoice Only' PPMs that do not require a visit by a physical engineer/technician.

14. The Maximum Work Order Count tick box and numeric field **are only present on Comprehensive PPM Tasks** and determine whether there is a limit to the amount of Reactive Work Orders that can be associated to the Contract financially and what that limit is. Tick the tick box to enable the numeric field and enter the relevant number of Work Orders in the numeric field. If the number of Work Orders exceeds the number stated then any Work Order above the limit will not be associated to the Contract financially. There is a "?" hover over next to these fields to explain what they do.

15. The Maximum Work Order Value tick box and numeric field are only present on

**Comprehensive PPM Tasks** and determine whether there is a limit to the value of each Reactive Work Order and whether those Work Orders can be associated to the Contract financially and what that limit is. Tick the tick box to enable the numeric field and enter the relevant number of Work Orders in the numeric field. If the value of a Work Order exceeds the value stated then that Work Order will not be associated to the Contract financially. There is a "?" hover over next to these fields to explain what they do.

16. Fill in any notes or instructions that may be relevant to this PPM Task. Instructions should contain any specific instructions that the Resource may need in order to carry out the PPM task. These instruction can be visible in the contractor Portal - this is Permission based. The maximum number of characters that can be entered in this field is 8,000.

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17. Upon clicking on OK, the User will then be presented with the Reason for Contract Change window.

18. After this, the certificate association is added to the selected PPM task line.

As well as the above screen, the other areas where the PPM Task Short Name appears are as follows:

Contracts Module > PPMs Tab > PPM Tasks Window

Contracts Module > PPMs Tab > Generate PPM Work Orders Action > Task Drop Down

Contracts Module > PPMs Tab > Generate PPM Work Orders Action > Potential Work Orders screen > Description field

Work Orders Module > Work Order List View > Equipment/Service Type Column Work Orders Module > Work Order Detail View > Type field

Finance Module > Unallocated Invoices > Assign to Work Order

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