Creating a New Batch Rule

💾 Wed, Jan 17, 2024 🛛 🖿 Batching

To create a new Batch Rule the User will need to follow the following steps:

- 1. Click on the Work Orders tab at the top of the screen.
- 2. The User will be presented with the following menu items:



Create New Batch Rule - allows the user to create a new Batch Rule within Ostara.

Edit Batch Rule - allows the user to edit an existing Batch Rule.

Batch Rule List - allows the user to view a list of Batch Rules already created.

3. To create a New Batch Rule, click on the "Create New Batch Rule" button.

4. This screen will open: Summary Tab:

Ostara Batch Rule - I	Pending Creation				
Ostara Batch Rule					() ₹X
General					Active 4
Batch Rule Name		Created By	Ryan Philips		
Batch Rule Description		Created Date	27 October 2022		
Settings					=
Count Release Threshold		🖉 Valid From	27 October 2022		
Quantity Release Threshold		🕢 Valid To			
Minimum Response Hours	ā 🛍 🚦	Q Active?	V		
				Cancel	Save

Batch Rule Name - this is a short name of the rule the user is just about to create.

Batch Rule Description - this is a more detailed description of the short name for the rule to be created.

Created By - is populated automatically with the Username of the person logged in.

Rule Type - is where the user can set if the rule is mandatory or not (currently the only option available is Optional)

Count Release Threshold - allows the User to specify a number which reflects the number of Work Orders that must be exceeded before a batch action is presented.

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Quantity Release Threshold - allows the User to specify a value that sums the contents of the quantity/code field on a Work Order. Once the sum of all the quantities of the pending batch Work Orders exceeds the Quantity Release Threshold the batch action will be available.

Valid From - is a date field that specifies the date from which the User would like this rule to apply from.

Valid To - is a date field that specifies the date which the User would like this rule to apply to. **Active?** - a tick box that specifies if the User would like this to be active or not.

5. Enter the Batch Rule Name and Description. The Created By and Created Date will be automatically populated and cannot be changed.

6. To enable the Count Release Threshold put a tick in the box. The User can then specify the number of work order required to be exceeded before batching is invoked.

7. To enable the Quantity Release Threshold put a tick in the box. The User can then specify the quantity that must be exceeded across all the pending batch Work Orders before batching automatically takes place.

 Valid From and To are date fields that when selected will determine when this rule applies. The Valid From date will be populated automatically with today's date
 Please note that the Valid From Date is mandatory and cannot be set in the past. The Valid To date can be left blank and as such there will be no end to this batch rule.

9. Upon entering all the information on this tab click on the Detail tab down the side:

Ostara Batch Rule -	Pending Creation					
Ostara Batch Rule					()	Ŧ
General						
Clients	Currently no clients selected Add/Amen	Contractor	Click here to make a selection		Ţ	
SRA/Contract						
SRAs	Click here to make a selection	Contracts	Click here to make a selection			
Specifics						
Work Order Types	Click here to make a selection	Buildings	Click here to make a selection		Ţ	
Equipment / Service Types	Click here to make a selection	Task Reasons	Click here to make a selection		Ţ	
				Cancel	Save	-

Clients - this is where the user can define which Clients they would like this rule to apply for. This is a mandatory selection

Contractor - this is a single-selection box where the user can define which contractor this rule applies to.

SRAs - this is a multi-selection box where the user can define what SRAs this rule applies to. **Contracts** - this is a multi-selection box where the user can define what contracts this rule applies to.

Work Order Type - this is a single selection field where the user can define what Work Order

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Type this rule applies to.

Buildings - this is a multi-selection box where the user can define what Buildings this rule applies to.

Equipment/Service Types - this is a multi-selection box where the user can define what Equipment/Service Types this rule applies to.

Task Reason List - this is a multi-selection box where the user can define what Reason Codes this rule applies to.

10. From this tab the User will need first need to specify which Client(s) this rule will be applicable to. To do this click on the add/amend button. The Client Selection window will open. Select one or more Clients.

11. Next the user can select which contractor the batch rule will apply to. These two selections will then influence which choices are then available to select in the following sections.

12. Next, the user can select which SRAs or which contacts the batch rule will apply to.

13. Next the User can define the Buildings that this rule will apply to. If it applies to all Buildings this can be left blank. If however this rule only applies to a select amount of Buildings this can be done by clicking on the drop down arrow on the Buildings field. This window will then open:

Se	Select Buildings				
	Select Buildings Select All Clear All Select All Filter Clear All Filter Select Not Filtered				
		Building Known As	Building No.	Building Name	
		Filter	Filter	Filter	
		(142) - ABBEYDALE	142	ABBEYDALE	
		(14230) - ABBEYDALE IP	14230	ABBEYDALE IP	
		(160) - ABERDEEN	160	ABERDEEN	
		(16020) - ABERDEEN PFS	16020	ABERDEEN PFS	
		(240) - ABERYSTWYTH	240	ABERYSTWYTH	
		(24020) - ABERYSTWYTH PFS	24020	ABERYSTWYTH PFS	
		(507) - ACCRINGTON	507	ACCRINGTON	
		(230) - ACOMB	230	ACOMB	
		(302) - ACTON	302	ACTON	
		(161) - AIRDRIE	161	AIRDRIE	
		(16120) - AIRDRIE PFS	16120	AIRDRIE PFS	
		(553) - ALDERSHOT	553	ALDERSHOT	
	•	III			
	1231	available items, 1231 filtered items, 0 selected items			
				OK Cancel	

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

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

16. 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.

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

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

19. Click OK when the Buildings required have been selected.

20. Next the Work Order Type need to be selected. This is a mandatory field and can be done by clicking the drop down arrow on the Work Order Type field. This window will open:

s	elect Work Order Type	
	BUILDING FABRICATION	•
	CASH OFFICE	
	CATERING	
	CHECKOUT	
	CLEANING	E
	COMMUNICATIONS EQUIPMENT	
	DECORATING	
	DOORS SHUTTERS	
	ELECTRICAL	
	EXTERNAL	
	FIRE	
	FLOORING	
	HEALTH AND SAFETY	
	HVAC	
	ITSOFTWARE	
	LAND	
	I IFT	-
	Filter	
	OK Cancel	
	Cancer	

21. Simply make a selection from the list provided and click OK. Clicking Cancel will return to the previous screen.

22. If the User would like to go down to a more granular level this can be done by clicking the drop down arrow on the Equipment/Service Type field. Leaving this blank means that the rules will apply to all equipment/service types under the Work Order Type selected. If the User decides that the rules only apply to a subset of Equipment/Service Types this can be done by clicking the drop down arrow on the Equipment/Service Type field. In doing so this window will open:

3	Select Task Types		
	DOORS SHUTTERS Automatic Door Automatic Folding Door		
	Automatic Revolving Door Automatic Sliding Door Automatic Swing Door		
	Less Abled Automatic Sliding Door	_	
	Less Abled Automatic Swing Door	=	
	Venicle barrier Fire Shutters Fire Shutters		
	Manual Internal Barrier		
	🖃 🔲 Manual Door 🥅 Manual External Swing Door		
	Manual Internal Fire Door Manual Internal Folding Door		
	Manual Internal Sliding Door	-	
	Find	L	
	OK		

23. This will display all Equipment/Services Types that apply to the Work Order Type selected. Select all the Equipment/Services Types that apply and click on the OK button. Clicking on Cancel will take you back to the previous screen.

24. Lastly the User can define which Task Reasons they would like to apply. Leaving this field blank means that the rules will apply to all Reason Codes. If the User decides that the rules are only to apply to certain Reason Codes this can be done by clicking the drop down button on the Task Reason List field. In doing this the Select Task Reasons window will open:

Select Task Reasons		
	Select All Clear All	
	 Hire Minor Works Misuse and Abuse Pest Control PPM Access Request Profit Protect Recommendation from Client Recommendation from Contractor Store Charge - Equipment Hire Charges Store Charge - Tools And Utensils Wear and Tear Breakdown 	
	Filter	
	OK Cancel	

25. Select all the Reasons that apply in the same way as before and click on the OK button. Clicking on Cancel will take the User back to the previous screen.

26. Clicking on the Save button will save the rules just defined. If there are any mandatory fields that have not been populated this will be shown by the way of a validation error that will look like this:



27. This will indicate the area that needs populating/amending. Once this has been done click on the Save button again.

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