## How to add a PPM Task onto a Contract

💾 Wed, Mar 13, 2024 🛛 🖿 Contract Scenarios

To add a PPM Task onto a Contract, the first step is to locate the Contract that the PPM Task should be added to.

Once the Contract is located, on the PPM Tab, using the "Edit Actions" button in the top right corner of the screen, select the "Add PPM Task" action:

	Refresh 🔻 View Actions 🔽 Edit Actions 젖						
Fr	Task Edit Actions						
Add PPM Task							
v	Change PPM Task Structure						
y v	Change PPM Task Details						

This will display the Add PPM Task dialog. From here, fill in the PPM Short Name - which is a brief summary of what the PPM Task is for, for example, "Fire Alarm Inspection", "Thorough Lift Examination", etc.

The selection of whether this is an Equipment-based PPM, or a Service-based PPM is required next, followed by the Reason for the PPM - whether it is Legislative or Routine for example:

Add PPM Task						
Short Name	Emergency Lighting Inspection					
Equipment / Service	Equipment O Comprehensive Equipment					
	Service O Comprehensive Service					
Reason	Legislative Inspection *					
Is Damage Included?						
Static Till Machinery						
Electrical Controls						
Motor Control Centre (MCC)						
Electrical Test and Inspection Emergency Electrical Distribution Panel (EDP)						
Emergency Lighting Control Panel (ECLPB)						
Emergency Lighting System						
Find	Select All Clear All					
Primary WO Type	ELECTRICAL *					
Allow Critical Remedial Works						
	OK Cancel					

Finally, choose the Equipment/Service Type(s) to be covered by this PPM - this can be a single selection or multiple Equipment/Service Type(s) depending upon the scope of the PPM. Once this is all selected, click OK, and the basic PPM Task will be created.

It should be noted that at this time, there are no Buildings, nor costs or frequencies of the PPMs set up. The next step is to configure the frequency of the PPM. So from the same "Edit Actions" menu as earlier, select "Change Task PPM Periods":



This will bring up the Task PPM Periods dialog box, that will allow you to change the Frequency of Visits, Invoice Count and Invoice costs:

Change PPM Task Periods							
Equipment Task between 01/10/2023 and 30/09/2024							
Frequency of Visits	None	-	Invoice Value	€0.00	0		
Invoice Count	None	-	Merged Invoice Value	€0.00			
			Site Value	€0.00			
Visits / Invoices							
Dynamic Date Updates Supported?	No	0					
Exclude from Dynamic Date Updates	No						
Financial Start Financial End Vis	sit Start Visit End	Inv Close	d Invoice Value				
				ОК	Cancel		

After choosing / inputting all the required information, click OK, and the PPM Task will update with those details. The next (optional) step will be to add a Certificate requirement to the PPM if it is necessary. To achieve this, use the same "Edit Actions" menu as earlier, and select "Change Task PPM Certificate Settings":

Change PPM Task Certificate Settings							
Equipment Task between 01/10/2023 and 30/09/2024							
Certificate Per	None						
Certificate							
	OK Cancel						

Select whether a certificate is required at a Work Order or an Asset level (most commonly it is a Certificate per Work Order) and then choose the Certificate and Frequency that is required:

	Change PPM Task Cer Equipment Task bet	rtificat	e Settings 01/10/2023 and 30/09/2024		
	Certificate Per		Work Order	•	
)at	Certificat	te	Click here to make a selection	₹	'alue
	Se	elect C	ertificate Type Emergency Lighting Certificate (2 Year) Emergency Lighting Certificate (Annual)	cel	

Click OK and the Certificate Requirement will be added to the PPM Task. The next step is to configure the Buildings against the PPM. This can be completed by following this article

Once all the above has been completed, and Buildings exist on the PPM Task, PPMs can then either be generated manually here or automatically.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=701