



# Planned Work and Asset Manager

## Uploader & Importer

### User Guide

## Contents

Introduction .....	3
What is PPM? .....	4
Your PPM Schedule .....	4
The Process – Basic Overview .....	5
Accessing the Planned Work and Asset Manager .....	6
The Tabs .....	7
Stage 1: Create Asset and Task Lists .....	8
Downloading the Template .....	8
Creating Your Own Spreadsheets .....	8
Filling In the Spreadsheet .....	9
Column Descriptions .....	10
FAQs .....	12
Preparing the Spreadsheet for Import .....	13
Checking the CSV File .....	14
Stage 2: Import Asset and Task List .....	15
Choose the Property .....	15
Find the CSV File .....	15
Stage 3: Manage Your Assets and Tasks .....	18
Changing the Data .....	18
Adding new assets .....	18
Uploading a Picture .....	19
Stage 4: Allocating your Planned Dates .....	20
Using dates from your spreadsheet .....	20
Changing/Adding Planned Dates .....	22
Moving a Scheduled Date .....	24
Deleting a Scheduled Date .....	25
Balancing Your Work .....	25
Stage 5: Review Your Planner .....	26
Stage 6: Submit For Approval .....	27
What happens next? .....	28
What if there is a delay in the Approval/Rejection? .....	29
And if I need help? .....	29



## Introduction

This document describes the process of creating a property's PPM schedule in your Service Providers' logbook on your client's Elogbooks system.

This guide describes the "Upload and import" process for creating your PPM schedule. It is designed for service providers who maintain large numbers of assets at each client property, or who carry out a large amount of tasks per property.

The import process reduces the amount of typing and manual input required to create the initial asset/task lists for each property, and can also speed up the allocation of planned dates to those assets and tasks. If you already have a lot of the required information about your assets/tasks in an electronic format (e.g. your own WORD doc or Excel spreadsheet) that information can easily be used during the importing process without having to re-type it.

However, an alternative method is also available, which allows the *manual entry* of information directly into your logbook. That method is generally more suitable for service providers who do just a handful of tasks per month at a property. In those cases, it is generally quicker to enter the task descriptions directly into your logbook without using the interim upload/import process. Dates for those tasks can also be manually planned directly into the logbook with just a few simple mouse clicks.

So, in summary –

- If you are an M&E company, or other type of service provider that will have an extensive asset/task list per property – ***continue reading this "Uploader and Importer" guide.***
- If you only look after few assets, or do perhaps less than 10-20 tasks per month – ***read the separate "Manual Planning" guide.***



## What is PPM?

The PPM Tab in your Service Provider's Logbook describes all of the planned maintenance works and/or scheduled tasks that you carry out at your clients' properties. This planned work is collectively described within Elogbooks as "PPM" -

- If you're an M&E company, or other type of company providing "hard" services, your PPM might be things like boiler servicing, emergency light testing, tap temperature testing, lift servicing, CCTV servicing, or regular landscaping and grounds maintenance.
- If you're a company that provides "soft" services, such as cleaning or security, your PPM would be the regular tasks that you carry out as part of that service, such as monthly window cleaning, annual deep clean of carpets, supervisors' audits or inspections etc.

PPM should not be confused with "Reactive" works or tasks, which are jobs that you do on an *unplanned* basis – e.g. boiler repairs, lift breakdowns, spillage clean-ups, graffiti removal, and any other special "on request" tasks requested by the client (urgent or otherwise).

## Your PPM Schedule

It is *your* responsibility to create and maintain your PPM schedules within your service providers logbook.

When you first start using a client's Elogbooks system, you are required to create your PPM schedules for the remainder of the current year, and then submit those schedules to your client for review and approval. At the end of each year, you are then required to re-generate your PPM for the forthcoming year.

Once a PPM schedule has been approved by the client, the individual jobs that go to make up the schedule are created on the system (visible from the "PPM" and "Planned" tabs in your logbook) and it is these jobs that you use to record and track the actual work being done, whether that is an annual boiler maintenance task, a monthly lift inspection or a weekly grass cut.

Your PPM schedules are created using the **Planned Work and Asset Manager** in your Service Provider's logbook, which is described fully in this manual.

***If you need general information on PPM within Elogbooks, or if you need any other help accessing or using your Service Provider's Logbook, see the separate "Service Provider's Logbook" manual, or contact our technical support team ([Techsupport@elogbooks.co.uk](mailto:Techsupport@elogbooks.co.uk) Tel: 01480 499740 ).***



## The Process – Basic Overview

The creation and submission of your PPM involves the following key stages -

- For each of your client’s properties, you will use a template Excel spreadsheet (supplied by Elogbooks) to create a list of the assets and/or tasks for which you want to create a PPM schedule.
- The spreadsheet will contain 1 row per asset or task. Each row will contain various columns of descriptive information about the asset, and also a 52-column planning section into which you can plan-in the schedule for that task or asset (e.g. to indicate weekly, monthly, quarterly and annual tasks).
- If you have some of the required information already stored elsewhere in electronic format (e.g. your own files or spreadsheets) you can easily copy data from that source into the relevant column in the template spreadsheet.
- Once complete, you will import your asset/task list into your service providers logbook on your client’s Elogbooks system.
- When the information has been imported into your logbook, you can discard the template spreadsheet and use the tools provided in the Planned Work And Asset Manager to edit, add or delete information going forwards.
- Once you’re happy with a schedule for a client’s property, you can then submit that schedule to the property’s designated “PPM Approver”, who will either approve or reject it.
- If the schedule is approved, the individual jobs will be created from the schedule as previously described. If the schedule is rejected, you can use the Planned Work & Asset Manager to make the required changes and re-submit.

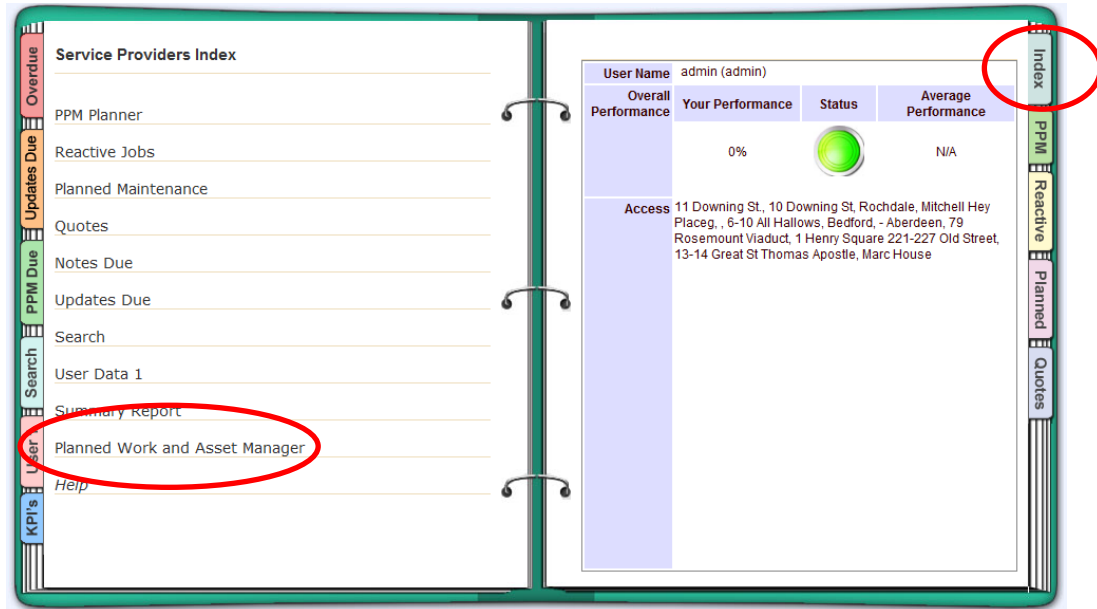
We generally recommend that you always liaise with your client during the PM planning process so that you understand what they require from you. It is their system, and each Elogbooks client has different PPM requirements for their service providers. If you have a dialog with your client before submitting your PPM, you reduce the risk of having your schedule rejected.

The remainder of this manual describes the above process.

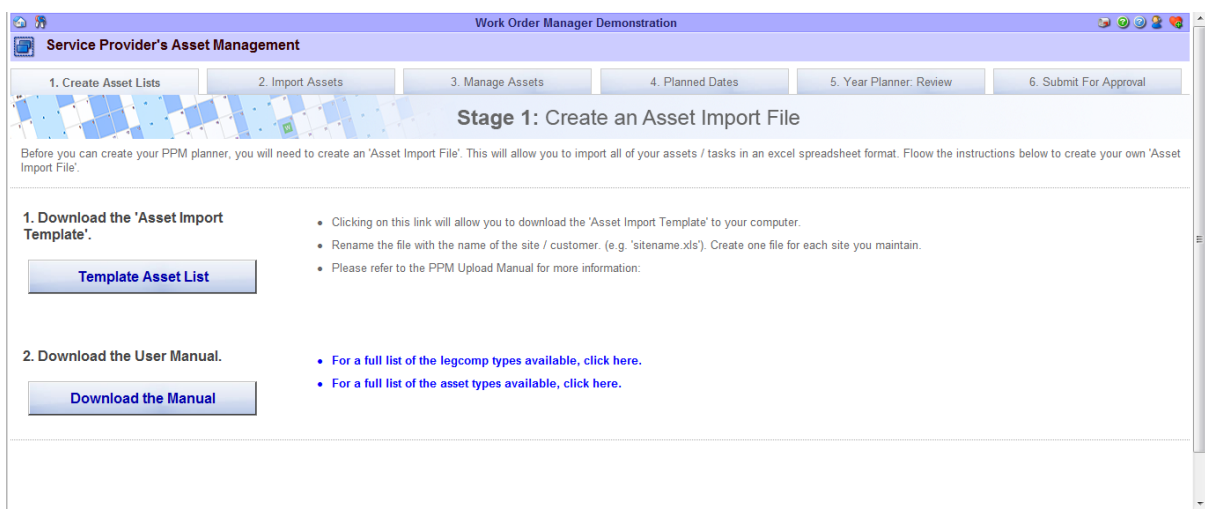


## Accessing the Planned Work and Asset Manager

On the **Index** page of your Service Provider's logbook, on the left-hand side you'll see a link labelled "Planned Work and Asset Manager" –



Click on the link and it will take you to the Service Provider's Asset Management page –



## The Tabs

Across the top of the page, you'll see several tabs outlining the separate stages of the PPM creation process –

- **Stage 1 – Create Asset Lists.**

On this tab you will download the template spreadsheet described earlier, which you will use as the basis for your asset and task lists. You will copy the template to create a separate spreadsheet for each property at which you do work.

- **Stage 2 – Import Assets.**

Once you have created an asset and task list for a property, and then optionally planned in the required dates, you then will use this tab to import the information into the Elogbooks system.

- **Stage 3 – Manage Asset.**

Once you have imported your asset and task list, the details of each asset and task can then be viewed and edited as required from this tab.

- **Stage 4 – Planned Dates.**

In this section you will be able to apply the dates that you planned in on the spreadsheet for each asset or task. You'll also be able to move the dates around, delete/change dates, and even add additional dates. (You can optionally use this tab to do all of your date planning if you wish, in preference to using the 52-week column in the template).

- **Stage 5 – Year Planner Review.**

Once you have setup all the dates for all the tasks or assets, you can review this information in the consolidated PPM year planner on tab 5.

- **Stage 6 – Submit for approval.**

When you are happy with the schedule, you can then use tab 6 to submit it to the property's "PPM Approver" for their review and approval. You can either submit a schedule for just one property, or if you have uploaded several lists and planned a schedule for several properties, you can optionally send them all for approval at the same time (the system will automatically send each schedule to the appropriate PPM Approver for each property).

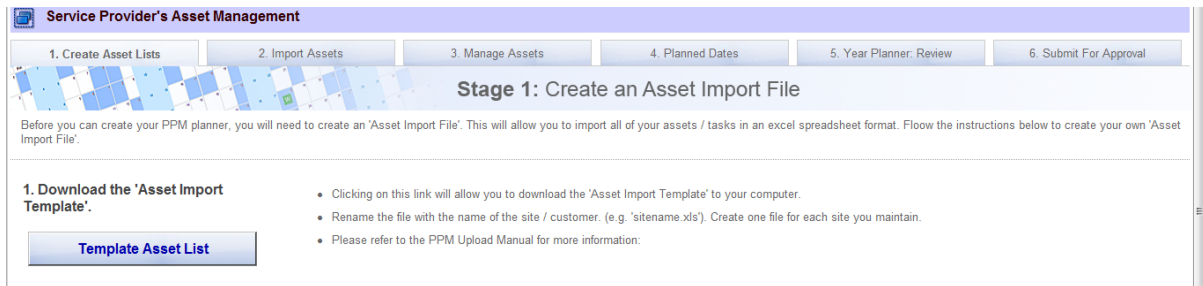


## Stage 1: Create Asset and Task Lists

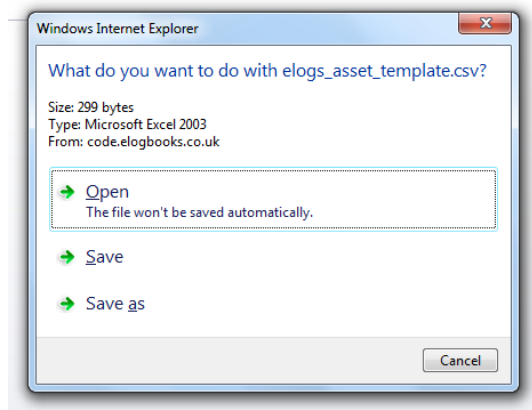
### Downloading the Template

The first step in the process is to download a template spreadsheet that you will use as the basis for creating your own asset and task lists.

Click on the **Template Asset List** button -



You will get a prompt like this –



Click **SAVE AS** and save the template spreadsheet to a location on your local hard disk.

### Creating Your Own Spreadsheets

Once you have the template spreadsheet saved on your local hard disk,

- Copy the template to create a new one.
- Give it a name that reflects the property at which the asset and task list applies.
- Repeat the process for each property, so that you have a *separate* list for each of the client's properties at which you do work.





## Filling In the Spreadsheet

When you open your spreadsheet with Excel it will look like the one below, and it will contain several illustrative examples of “hard” maintenance (on boilers) and “soft” tasks (window cleaning and grass cutting). You can delete these lines once you start entering your own data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	description	location	area	qty	legcomp	make	model	serlnho	cond	risk	business_continuity	life	brc	brcm	notes
2	Boiler1	Kitchen		1	electrical	Boiler Make A	Boiler Model A	ABC-1234-4321	6	5	1	10	£2,400	£4,000	This is the main boiler
3	Boiler2	Basement		1	water	Boiler Make B	Boiler Model B	XYZ-9876-5643	3	4	10	21	£2,000	£5,000	This is the backup boiler
4	Monthly window cleaning	Entire building		1						5	5				
5	Weekly grass cutting	All the grounds		1						2	8				

If you scroll to the right of the spreadsheet (see below), you’ll see that it contains additional columns for each week of a 52-week year. You can, if you wish, plan in your dates in these columns of the template, or you can do it once the asset/task list has been uploaded to your logbook (see Stage 4 later).

	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
1	life	brc	brcm	notes	sfgcode	wk1	wk2	wk3	wk4	wk5	wk6	wk7	wk8	wk9	wk10	wk11	wk12	wk13	wk14	wk15	wk16	wk17
2	10	£2,400	£4,000	This is the main boiler	05-18																	
3	21	£2,000	£5,000	This is the backup boiler	05-21																	

Simply fill-in the spreadsheet as required with your assets and/or tasks (and optionally the planned dates).

All of the columns are described on the next page of this manual. As you click on each column in the spreadsheet, you will see some guidance on what you need to enter.

The column contents and controls are varied. Some are free-form text (e.g. description, location, make, model) and some are forced as numeric (e.g. Qty). There are also some columns that are fixed form text or numeric, with the content being selected from a drop-down box. The Condition Code, for example, must be a value of 1 – 6.



## Column Descriptions

Here is a summary description of all the columns in the spreadsheet. Only the Description and QTY columns are mandatory, the others can be filled-in or left empty as appropriate to the task or asset.

Column heading	Description
Description	<p><b>Hard Services.</b> The name of the asset. Each asset at a property should ideally have a unique name, so if you have two boilers, call them “Boiler1” and “Boiler2”. If the assets must have the same name, use the Location and Area fields to differentiate them.</p> <p><b>Soft Services.</b> The name of the specific recurring task, e.g. “Grass cutting” or “Window Cleaning”.</p>
Location	<p><b>Hard Services.</b> The physical location of the asset.</p> <p><b>Soft Services.</b> The location where the recurring task will take place.</p>
Area	<p><b>Hard <i>and</i> Soft Services.</b> An additional text description to further identify where the asset is located or the task is done.</p>
Qty	<p><b>Hard Services.</b> The number of assets included in the recurring service routine. For example, in an emergency lights job, you would not want to create a separate asset line for each light. So, the asset description would be “emergency lights”, the location might be ‘1st floor’ and the Qty will be the number of lights.</p> <p><b>Soft Services.</b> Value must be set as 1</p>
Legcomp	<p><b>Hard Services.</b> If this task has a legal requirement, select the appropriate value from the drop-down box.</p> <p><b>Soft Services.</b> Ignore, can be left blank</p> <p><i>Note: The selection of a value for this field is mandatory on assets or task for which there will be a legal requirement to provide supportive paperwork when the job is completed (e.g. a boiler service). Any jobs created for an asset/task with a Legcomp value selected will require paperwork to be attached to them before the job can be marked as completed. Some Elogbooks clients extend this mandatory requirement for paperwork to other types of assets/tasks, so please check with your client if in any doubt.</i></p>
Make Model Serial No	<p><b>Hard Services.</b> The manufacturer’s make, model and serial number for the asset.</p> <p><b>Soft Services.</b> Ignore, can be left blank</p>
Cond	<p><b>Hard Services.</b> The condition of the asset. Select the value from the drop-down box provided. Values are –</p> <ul style="list-style-type: none"> <li>• 1 – Un serviceable</li> <li>• 2 – Replacement required/imminent</li> <li>• 3 – On Notice (client has been advised)</li> <li>• 4 – Ok</li> <li>• 5 – Good</li> <li>• 6 – New</li> </ul>



	<b>Soft Services.</b> Ignore, can be left blank
Risk	<p><b>Hard <i>and</i> Soft Services.</b> The risk level associated with maintaining the asset or carrying out the task. Select the value from the drop-down box provided.</p> <ul style="list-style-type: none"> <li>• 1 - None</li> <li>• 2 - Low</li> <li>• 3 - Medium</li> <li>• 4 - High</li> <li>• 5 – Extreme</li> </ul>
Business_Continuity	<b>Hard <i>and</i> Soft Services.</b> The business continuity risk associated with the failure of this asset (or failure to carry out this task). A score of 1 is low, 10 is high.
Life	<p><b>Hard Services.</b> The estimated remaining lifespan of the asset (in years).</p> <p><b>Soft Services.</b> Ignore, can be left blank.</p>
Brc	<p><b>Hard Services.</b> Budget Replacement Cost (Labour only) for the asset.</p> <p><b>Soft Services.</b> Ignore, can be left blank.</p>
Brcm	<p><b>Hard Services.</b> Budget Replacement Cost (Parts and Materials) for the asset.</p> <p><b>Soft Services.</b> Ignore, can be left blank.</p>
Notes	This is a free text field into which you can enter any additional description or notes for the asset or task.
SFGCode	<p><b>Hard Services.</b> If you are an M&amp;E company and you use SFG codes, you can add the appropriate code here for each asset that you maintain. The service routine associated with that code will be displayed with the job details. The code you enter must be a valid SFG code, otherwise it will be ignored.</p> <p><b>Soft Services.</b> Ignore, can be left blank.</p>
Wk1-wk52	<p><b>Hard <i>and</i> Soft Services.</b> Optionally use these columns to specify the schedule of when an asset will be maintained or serviced, or when a task will be carried out. For example, a monthly task might have an “M” in every 4<sup>th</sup> column (wk1, wk5, wk9 etc), while a quarterly task might have a “Q” in every 13<sup>th</sup> column.</p> <p>Here is the key for the possible values –</p> <ul style="list-style-type: none"> <li>• W – Weekly</li> <li>• F – Fortnightly</li> <li>• M – Monthly</li> <li>• Q – Quarterly</li> <li>• A – Annual</li> <li>• H – Half-yearly (6-monthly, bi-annual)</li> <li>• T – Every 4 months (tri-annual)</li> <li>• B – Every 2 months ((2-monthly, bi-monthly)</li> </ul>



## FAQs

### ***Some of the headings don't apply to the assets or tasks that I'm adding. What should I do?***

No problem, just fill-out what's applicable. Only the Description and Qty columns must contain a value, all the others are optional and required only in the context of the assets or tasks that you are adding.

### ***Can I put the assets/tasks for more than one property on the same sheet?***

No. You must create a separate spreadsheet for each property. To make the import process easier, you should give each spreadsheet a name that reflects the property name so that it is easier to match up during the import process.

### ***Can I add extra columns to the spreadsheet?***

Yes you can, but...the data in those extra columns will be for your own information or documentation purposes and will NOT be imported into the Elogbooks system.

### ***Why can't I use my own existing spreadsheet? Why do I have to fill-in the template?***

The Elogbooks asset importer cannot handle service providers' *own* spreadsheets, which will all be in different formats and using different columns, in a different order with different headings. The data has to be in a consistent and predictable format in order for the importer to read, identify and understand the data....hence the requirement to use the template spreadsheet.

### ***We do a daily task (e.g. cleaning, security, reception). How do I reflect that on the schedule?***

Some soft services carry out daily tasks on site, such as daily cleaning or manned guarding services. It is not practical to create a daily task on the system, as this would require you to log in and close down that task every day, so this is generally covered by creating a task called something like "Provision of Daily Cleaning", and then giving the task a weekly or monthly schedule. You then close down the task each week/month and upload a document to the job which might be something like an attendance sheet or report to reflect the soft service that has been provided or carried out. If in any doubt about how to handle this, always check with your client.

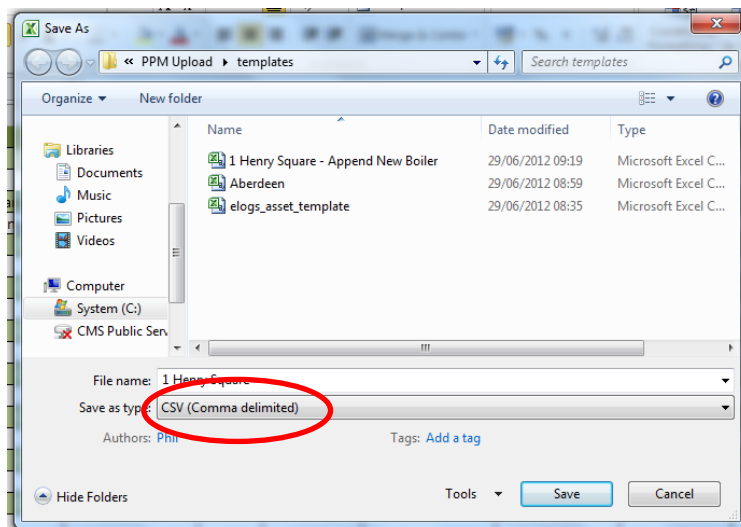


## Preparing the Spreadsheet for Import

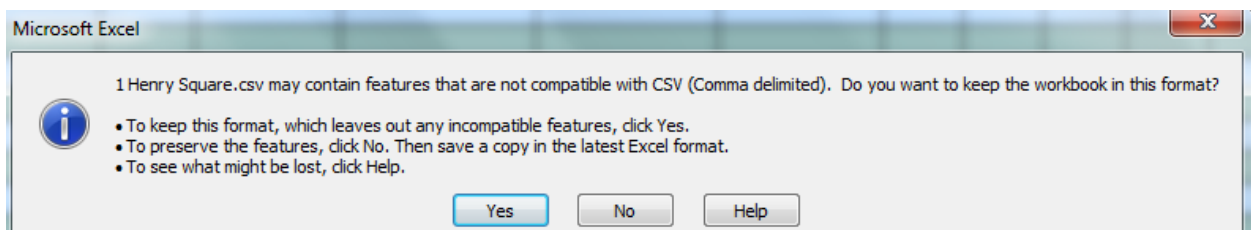
**Note: This next step is very important and should be done carefully to ensure that the import process works correctly.**

Once you have filled-in your spreadsheet for a property, you are ready to upload it to your service providers logbook on your client's Elogbooks system.

- Do a **SAVE** within Excel to make sure that you have saved a base copy of your spreadsheet
- Then do a **SAVE AS** to save a separate copy of the file.
- In the SAVE AS window (see below), select **CSV (Comma Delimited)** as the Save As Type

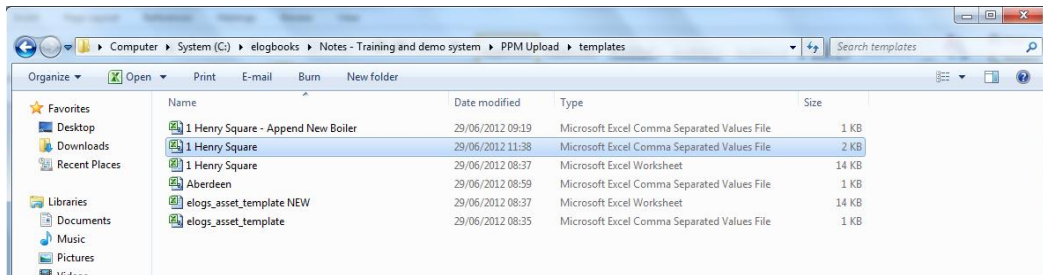


- Click **Save** in the window above to save the new CSV file.
- Click Yes to the prompt below (this will save the file in CSV format but remove all of the help features and drop-down boxes that were part of the original template).



## Checking the CSV File

Before you move onto the next step, check the folder on your local hard drive where you stored the files to make sure that you have definitely created and saved a separate CSV version of your original asset and task spreadsheet -



You have now completed the first phase of the process and you are ready to import your information into your logbook.

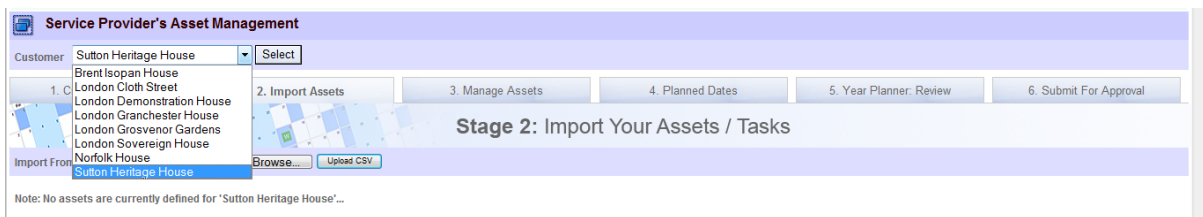


## Stage 2: Import Asset and Task List

The next stage in the process is to upload your CSV file into your client's Elogbooks system, and then import the data into your service providers logbook. Return to the Planned Work and Asset Manager in your logbook and click on the tab labelled "2. Import Assets"

### Choose the Property

Choose the property from the **Customer** drop down list. In our example below we are selecting the property called Sutton Heritage House.

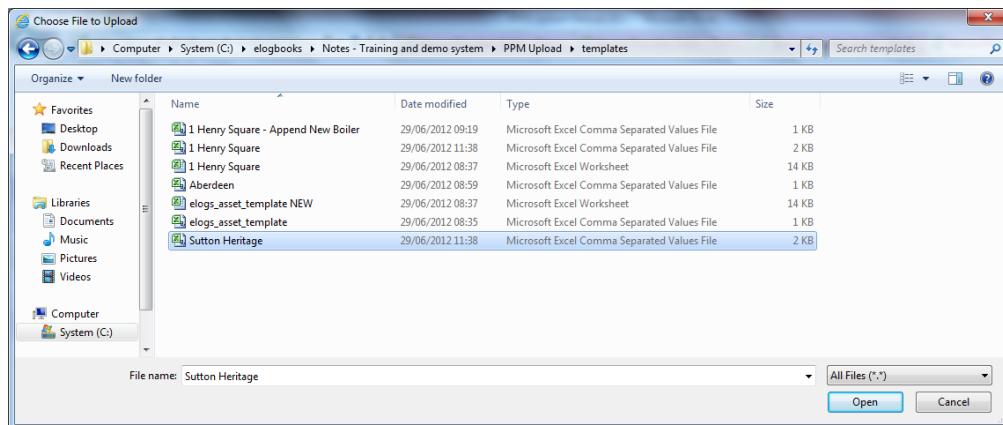


### Find the CSV File

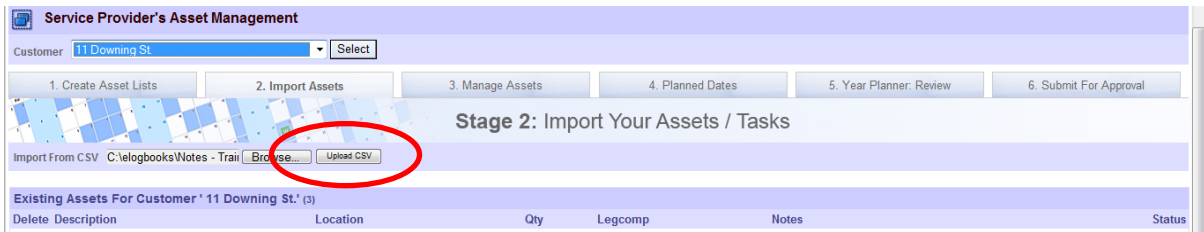
Once you have the right property selected, click on the **Browse** button -



Locate the **CSV** file you've created for the property. Make sure you pick the CSV version and not the original Excel spreadsheet. Then click **Open** to select it.



The filename will appear in the **Import From CSV** box, and you can then click the **Upload CSV** button to upload it –

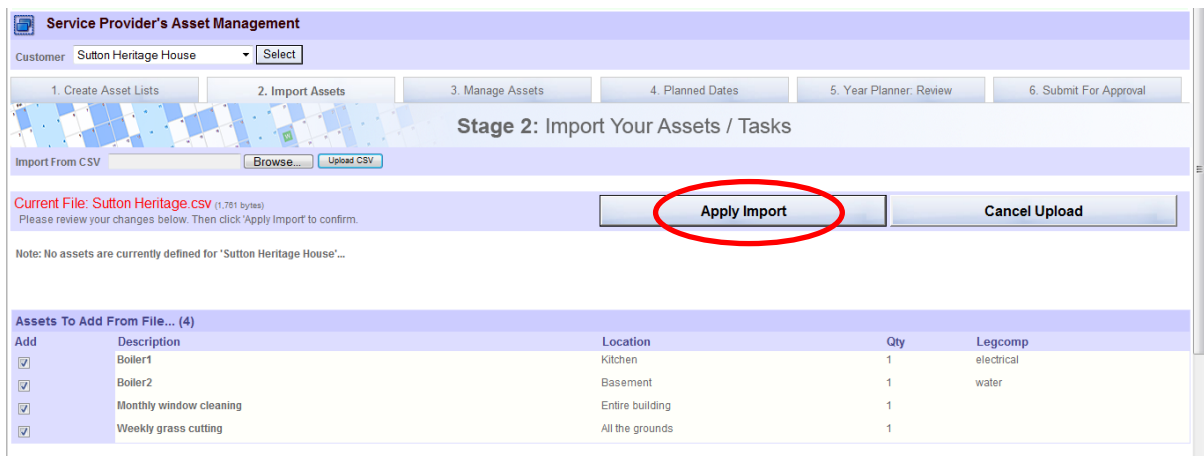


The Asset Management screen will then be updated to look like the one below.

- In red, you will see the name of your **CSV file** that has been uploaded.
- Below the red message is a confirmation that no assets or tasks are currently defined for this property.

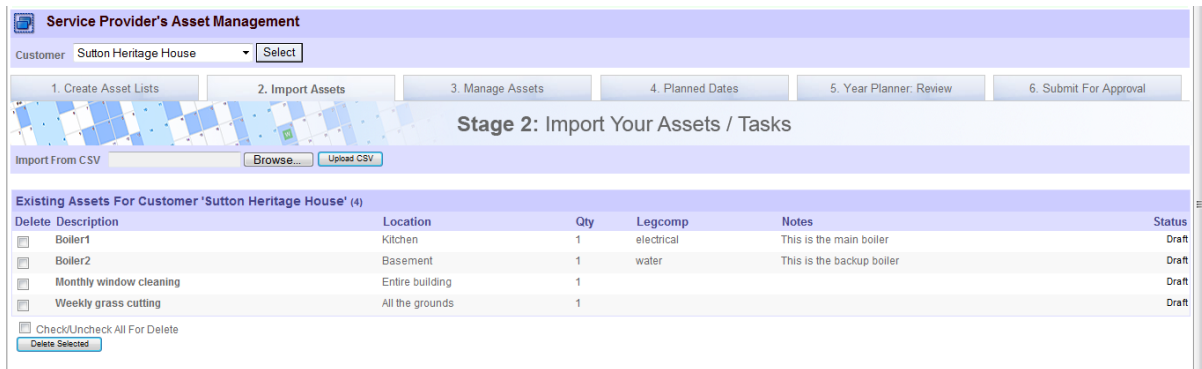
*See the "Adding New Assets and Tasks" section for details on how to add additional assets and tasks to a property after an initial upload and import has been done.*

- At the bottom, you will see a **list of the assets** and tasks that were in your CSV file. By default, all of the assets and tasks will have a tick in the ADD column. You can, at this point, optionally un-tick any of them if you don't wish to import them.
- Assuming all looks ok, click the **Apply Import** button to action the import process.

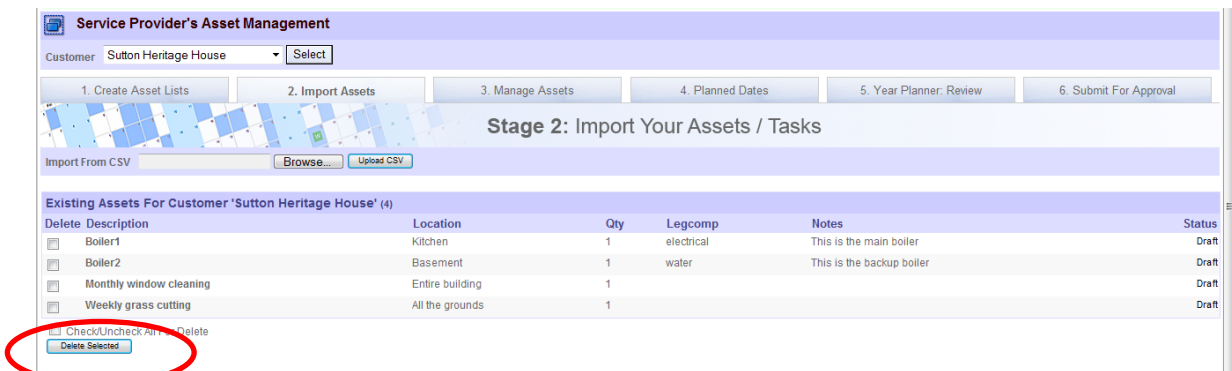




After a brief pause, the screen will update to show that the assets and tasks have now been imported into the system and associated with the selected property.



You have the option at this point to delete one or more of the imported assets, which can be done by clicking the **Delete** box to the left of the asset and then clicking on the **Delete Selected** button.



***If you have any problems with this process, or if you are unable to successfully upload and import data from your CSV file, please contact our technical support team and we will guide you through the process ([Techsupport@elogbooks.co.uk](mailto:Techsupport@elogbooks.co.uk) Tel: 01480 499740 ).***



## Stage 3: Manage Your Assets and Tasks

Once you have completed the import process, you can then click on the tab labelled “3. Manage Assets”, which will take you to the **Stage 3: Manage Your Assets / Tasks** screen –

**Service Provider's Asset Management**  
Customer: Cambridge, Harcombe Plaza  
No approver for this site.

1. Create Asset Lists | 2. Import Assets | **3. Manage Assets** | 4. Planned Dates | 5. Year Planner: Review | 6. Submit For Approval

### Stage 3: Manage Your Assets / Tasks

Filter: Asset Description, Building, Floor, Filter, Reset

**Asset (25): 'Boiler1'** [Update Asset] [Add New Asset]

Description	Boiler1
Our ID	25
Quantity	1
LegComp Type	None Selected
Location	Kitchen
Area	
Building	
Make	Boiler Make A
Model	Boiler Model A
Serial No	ABC-1234-4321
Condition	6 - New
Health & Safety Risk	5 - Extreme
Business Continuity Risk	None Selected
Remaining Lifespan	10
Budget Replacement Cost (Labour)	£2,400
Budget Replacement Cost (Materials)	£4,000

Assets: 14

- 25 **Boiler1**
- 26 Boiler2
- 29 Fire Extinguisher
- 28 Grass Cutting
- 31 Lift 1
- 33 Lift 2
- 27 Lift 3
- 7 Monthly window cleaning
- 2 Patio Jetwash
- 3 Provision of Daily Cleaning
- 6 Weekly grass cutting

- On the left-hand side of the screen you will see a list of the assets and tasks that you imported from your CSV file. If the list is particularly long, you can use the filter section above the list to search for particular tasks or assets.
- On the right-hand side of the screen you will see the details of the asset or task that you have clicked/highlighted in the left-hand list (the one in BOLD). In this display you will see all of the data that was taken from your CSV file.

## Changing the Data

At this point you can change the data in any way you wish. Simply edit the field(s) and click on the **Update Asset** button to update the asset or task's details.

## Adding new assets

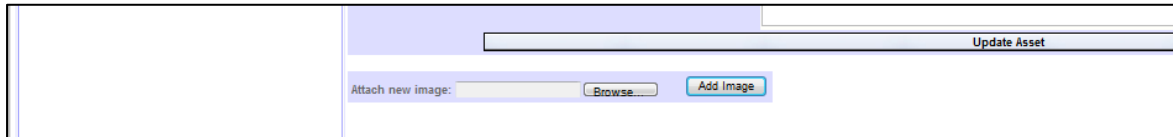
You can also add additional new assets or tasks by clicking on the **Add New Asset** button and then filling in the required fields.

*Important Note: Once you have imported the data from your spreadsheet, the data control and management of the assets and tasks is done entirely within the Elogbooks system, so any changes that you make in the Manage Assets screen will not be reflected back into your original spreadsheet, which is just a temporary tool to facilitate the import process (it is essentially redundant after the data has been loaded to your logbook).*

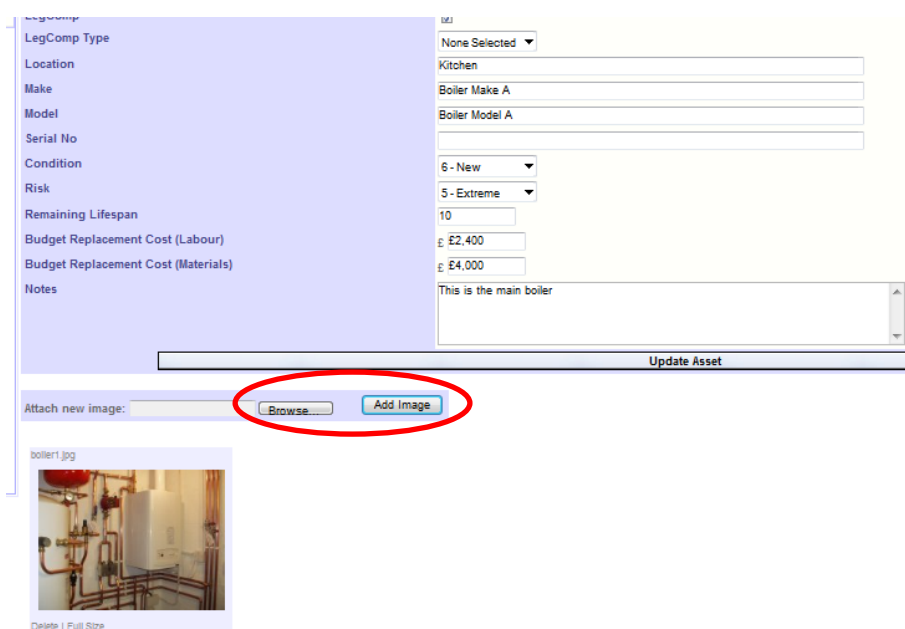


## Uploading a Picture

If you wish, you can upload a supporting image for any of your assets or tasks. Below the Update Asset button you will see a section labelled “Attach New Image” ...



Click on the **Browse** button to locate an image on your local hard drive, then click on the **Add Image** button to add your image -



Adding images is particularly useful when you have several similar assets (e.g. boilers) and you want to help distinguish between those assets.




## Stage 4: Allocating your Planned Dates

Tab 4 is where you can implement the dates that you scheduled in via the Wk1-Wk52 columns in your spreadsheet. Or, if you left those columns blank, you can manually schedule in some dates here too (see “Changing/adding planned dates” later in this section).

### Using dates from your spreadsheet

If you included planned dates in the Wk1-Wk52 columns in your spreadsheet for some or all of your assets/tasks, you now need to bring those dates into the planner.

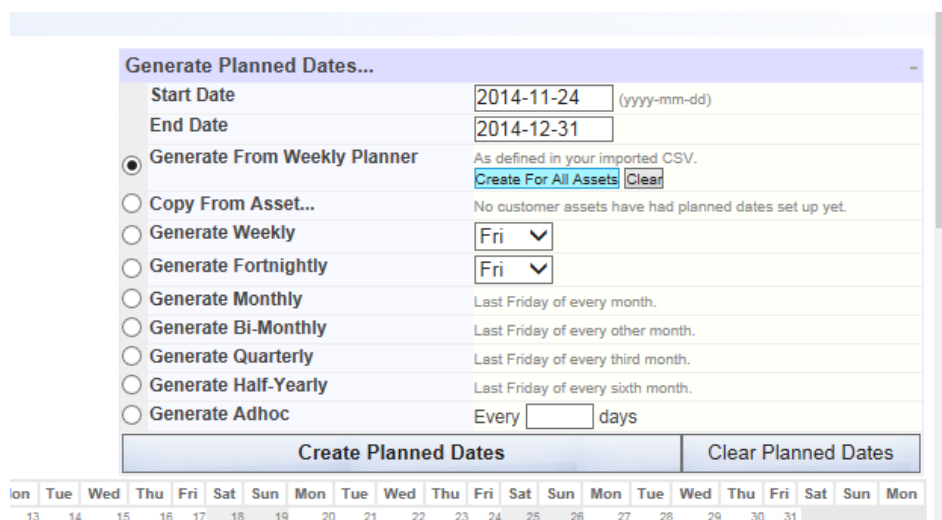
Click on Tab 4, and then click on the “Generate Planned Dates...” link above the main year planner.



The screenshot shows a software interface with a navigation bar at the top containing six tabs: 1. Create Asset Lists, 2. Import Assets, 3. Manage Assets, 4. Planned Dates, 5. Year Planner Review, and 6. Submit For Approval. The main area is titled "Stage 4: Create and Move Jobs". On the left, there is a filter section with fields for "Asset Description", "Building", and "Floor", and a list of assets including "7275 A/C Unit 11 + Condensor - FCC". The main part of the interface is a calendar grid for the year 2014, with columns for each day of the week and rows for each month. A link labeled "Generate Planned Dates..." is circled in red above the calendar grid.

This will open up a display like the one shown below.

All you need to do to bring your dates into the planner is to click the “Generate From Weekly Planner” option, and then click the “Create for all assets” button.



The screenshot shows a dialog box titled "Generate Planned Dates...". It contains the following fields and options:

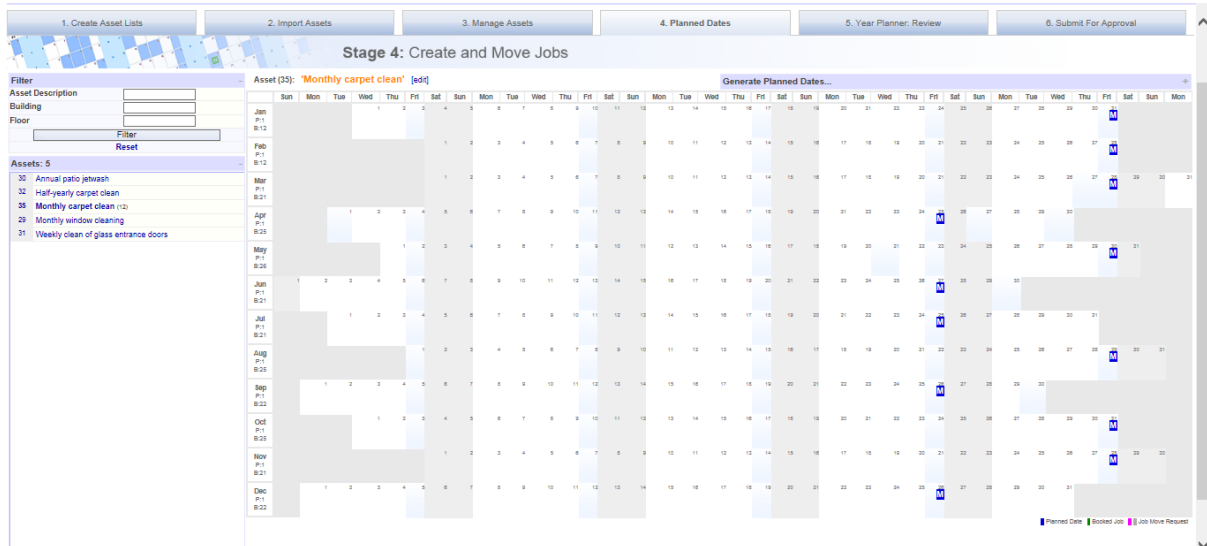
- Start Date: 2014-11-24 (yyyy-mm-dd)
- End Date: 2014-12-31
- Generate From Weekly Planner: As defined in your imported CSV. Includes buttons for "Create For All Assets" and "Clear".
- Copy From Asset...: No customer assets have had planned dates set up yet.
- Generate Weekly: Fri (dropdown)
- Generate Fortnightly: Fri (dropdown)
- Generate Monthly: Last Friday of every month.
- Generate Bi-Monthly: Last Friday of every other month.
- Generate Quarterly: Last Friday of every third month.
- Generate Half-Yearly: Last Friday of every sixth month.
- Generate Adhoc: Every [ ] days

At the bottom of the dialog are two buttons: "Create Planned Dates" and "Clear Planned Dates". Below the dialog, a partial calendar grid is visible, showing days from 13 to 31.



Any dates that you provided in your spreadsheet will then be applied to the appropriate task or asset. If you click on any of the assets/tasks listed down the left-hand side, that asset/task's imported dates will appear in the main year planner.

If, for example, you created a monthly schedule for a task or asset, the year planner would like similar to this -



It is important to note here that the Planned Dates in your PPM schedule are “to-do-by” and not “to-do-on” dates. This means that the dates shown on the year planner are the dates by which each job needs to be done **by**, and not the dates that the job actually has to be done **on**.

When planning your schedules, you should always allow yourself time and leeway when planning in your to-do-by dates, especially for tasks that might be subject to delays, such as those done outdoors (weather related), or which are sub-contracted, or which may require the production of paperwork after the actual task itself has been done.

Make sure that your to-do-by dates are realistic and that they accommodate the potential for delays.

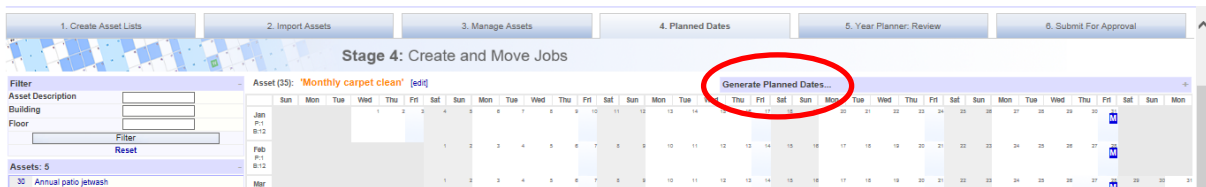


## Changing/Adding Planned Dates

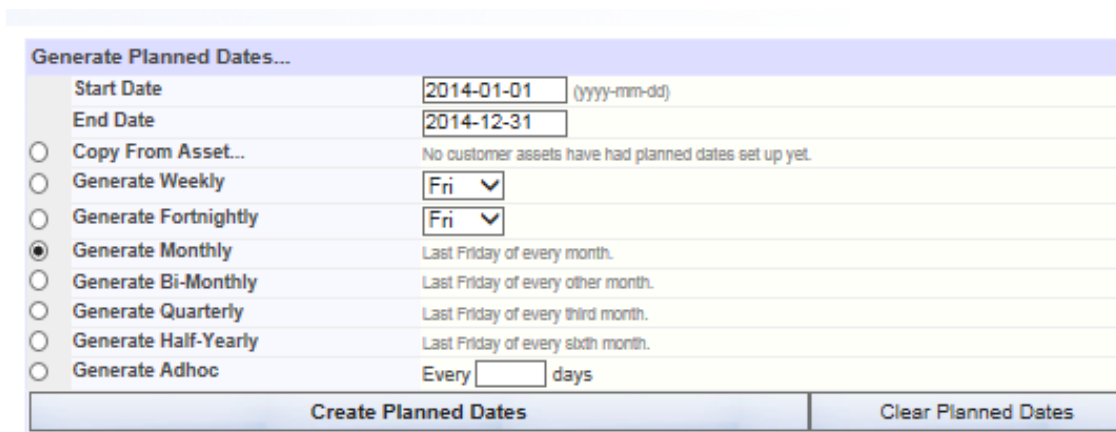
It's possible that, after importing your dates, you realise that you have made a mistake with the dates of one or more of your assets or tasks. Or perhaps, as we'll see later, your client has rejected your schedule and you need to make some changes. Or maybe you used the "Add New Asset" button as described above to add additional assets that weren't in your original spreadsheet and which, as a consequence, do not yet have any planned dates associated with them.

It is for all of the above reasons that you might wish to edit, change, move or add planned dates for one or more of your assets or tasks. Let's begin first with adding dates...

There are two ways that you can add dates for an asset, the first of which is through the "Generate Planned Dates" link that we saw earlier -



If you click on the link, it will display a drop-down like this –

The image shows a dialog box titled 'Generate Planned Dates...'. It has a light blue header. Below the header, there are two text input fields: 'Start Date' with the value '2014-01-01' and a placeholder '(yyyy-mm-dd)', and 'End Date' with the value '2014-12-31'. Below these are several radio button options: 'Copy From Asset...' (with text 'No customer assets have had planned dates set up yet.'), 'Generate Weekly' (with a dropdown menu showing 'Fri'), 'Generate Fortnightly' (with a dropdown menu showing 'Fri'), 'Generate Monthly' (which is selected, with text 'Last Friday of every month.'), 'Generate Bi-Monthly' (with text 'Last Friday of every other month.'), 'Generate Quarterly' (with text 'Last Friday of every third month.'), 'Generate Half-Yearly' (with text 'Last Friday of every sixth month.'), and 'Generate Adhoc' (with text 'Every' followed by an empty text input field and the word 'days'). At the bottom of the dialog, there are two buttons: 'Create Planned Dates' and 'Clear Planned Dates'.

You can use this drop-down to very quickly add-in dates for an asset. The example we show above will add a monthly date (last Friday on the month) for all months between Jan and Dec 2014. The start date at the top will default to the current date so that you don't create dates in the past.

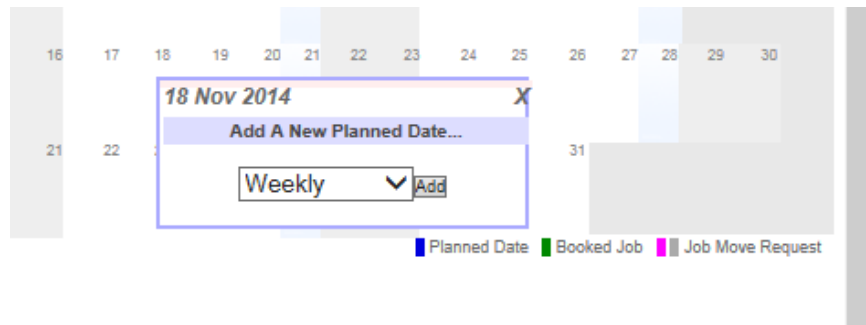
You can see that there are lots of other options to create weekly, fortnightly bi-monthly, quarterly and half-yearly dates – in line with the options that were available in the Wk1-Wk52 columns in your original spreadsheet.



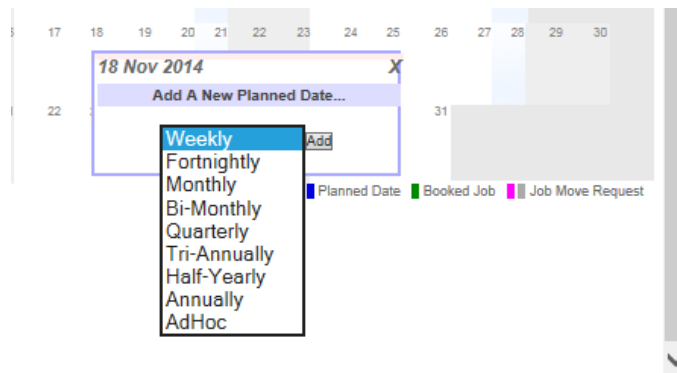
Once you've selected the required option, simply click the "Create Planned Dates" button to create the dates.

If you make a mistake, you can delete dates for an asset by clicking the "Clear Planned Dates" button (make sure you have the right asset clicked on the left-hand list before you do this!). If you only want to delete one of the dates, see "Deleting a scheduled date" below.

The second way of adding dates for an asset is to click inside a date box on the asset's year planner, which will display a pop-up like the one shown here –



If you click on the drop-down, it will display a list of the usual frequencies –



Select the appropriate frequency, click the Add button, and the planned date will be added for this asset.

This method is sometimes more appropriate (and quicker) than using the Generate Planned Dates options described earlier, especially for annual, ad-hoc or less frequent jobs which don't fit the usual weekly, monthly, quarterly pattern etc.



## Moving a Scheduled Date

If you want to move a scheduled date, just click on the date block and a small window will appear as shown below. Click on the blue “up/down arrow”...

The screenshot shows a software interface for managing assets. On the left, a 'Filter' sidebar lists assets: 832 Boiler1 (7), 833 Boiler2 (8), 834 Monthly window cleaning (7), and 835 Weekly grass cutting (13). The main area displays a calendar grid for 'Asset (834): Monthly window cleaning'. The grid shows months from Jan to Oct. A date block for '27 Jul 2012' is highlighted. A context menu is open over this date, showing options: 'Planned, This Asset...' (with a blue up/down arrow), 'Monthly', and 'All Planned, This Site: 2'.

.....and then hover over the date where you want to move to (in our example it's the Tuesday before the scheduled Friday), then click, and the block will be moved to the new date.

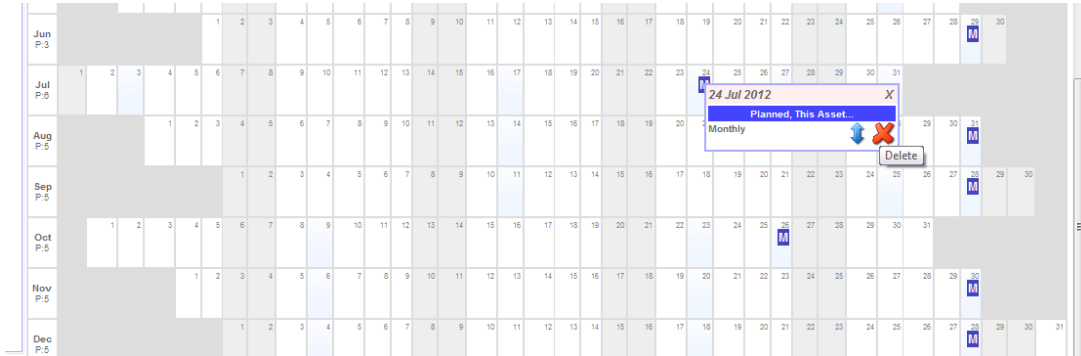
This screenshot shows the same software interface as above, but the date block has been moved. The date '27 Jul 2012' is no longer highlighted. Instead, a date block for 'Tue, 24 Jul 2012' is highlighted, indicating the successful move of the scheduled date.





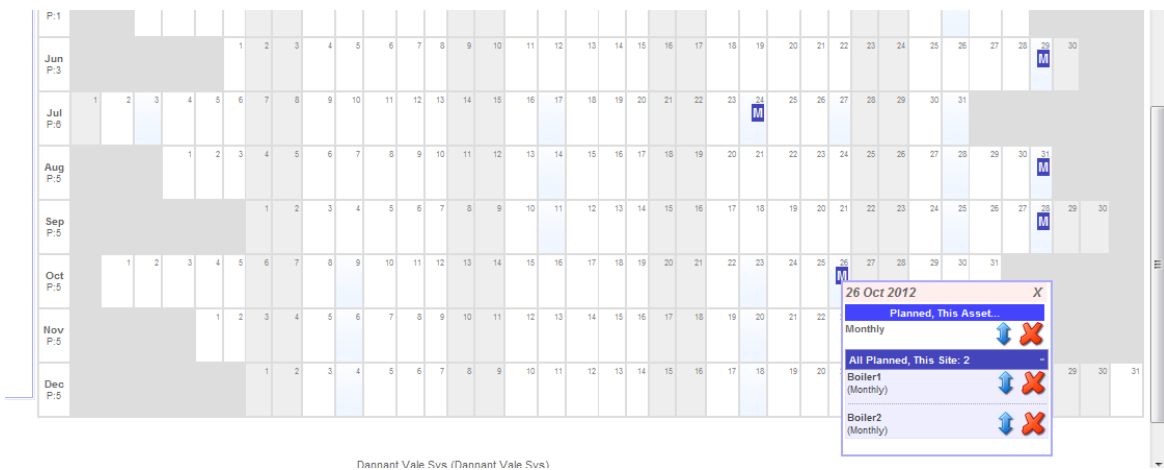
## Deleting a Scheduled Date

If you want to delete a scheduled date (but leave all the other dates for this asset in place), click on the date you want to delete, and then click on the red “x” delete icon -



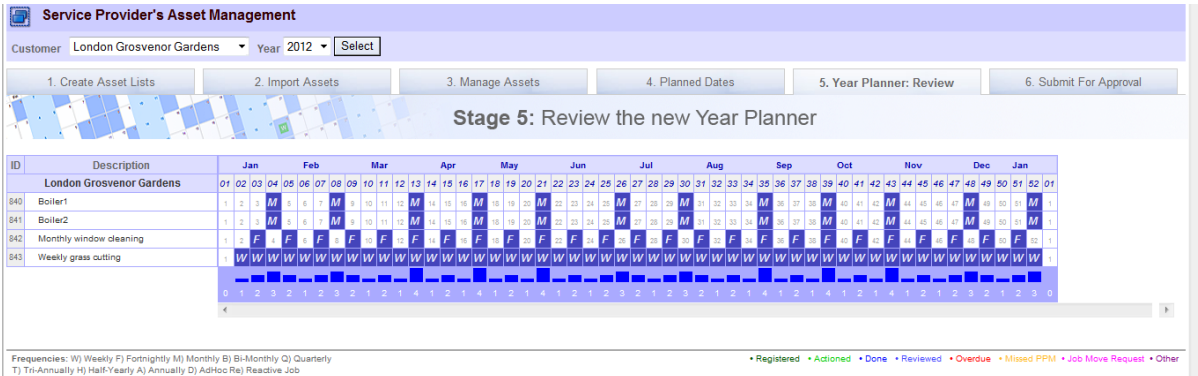
## Balancing Your Work

If you have other jobs allocated on the same date, either at the same property or at another of the client’s properties, they will be displayed when you hover over the date. This display might be helpful to assist you with balancing your PPM workload across your client’s properties



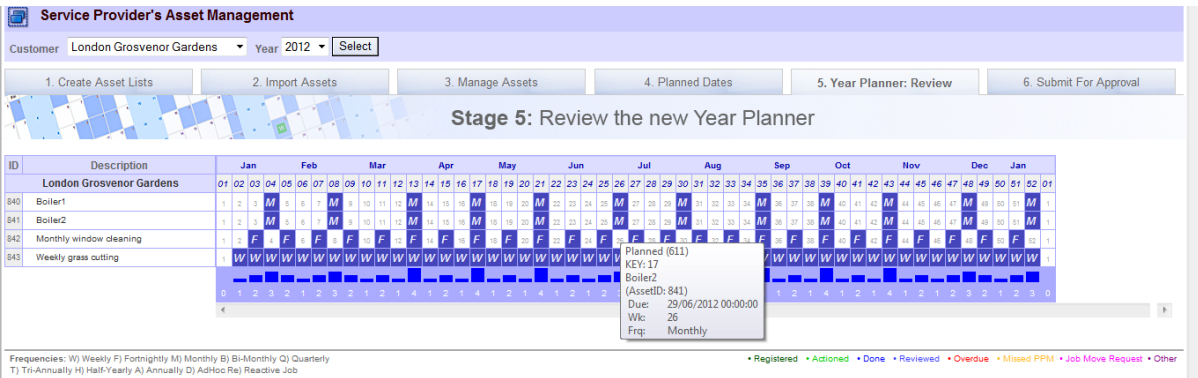
## Stage 5: Review Your Planner

Once you have setup all your scheduled dates, you can view them in a consolidated planner, which you access via the tab labelled “5. Year Planner Review” -



There is a key at the bottom of the planner to explain the meaning of the letters (W=weekly, F=fortnightly, M=monthly). Underneath each week column you will see a number showing how many jobs or tasks are allocated in that week.

If you hover over any of the date blocks, it will show some summary information about the job or task -



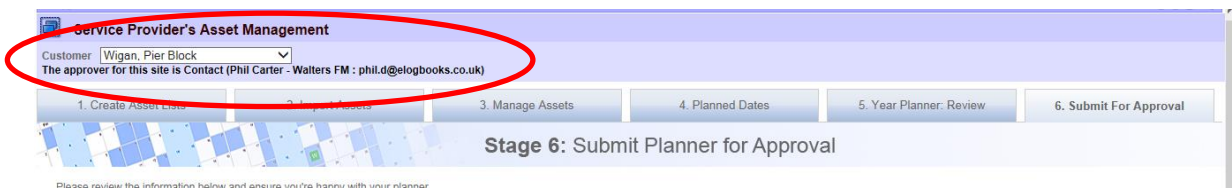
You can, if necessary, go back to the “4. Planned Dates” tab and move some of the planned dates around and then come back to the planner to re-preview.



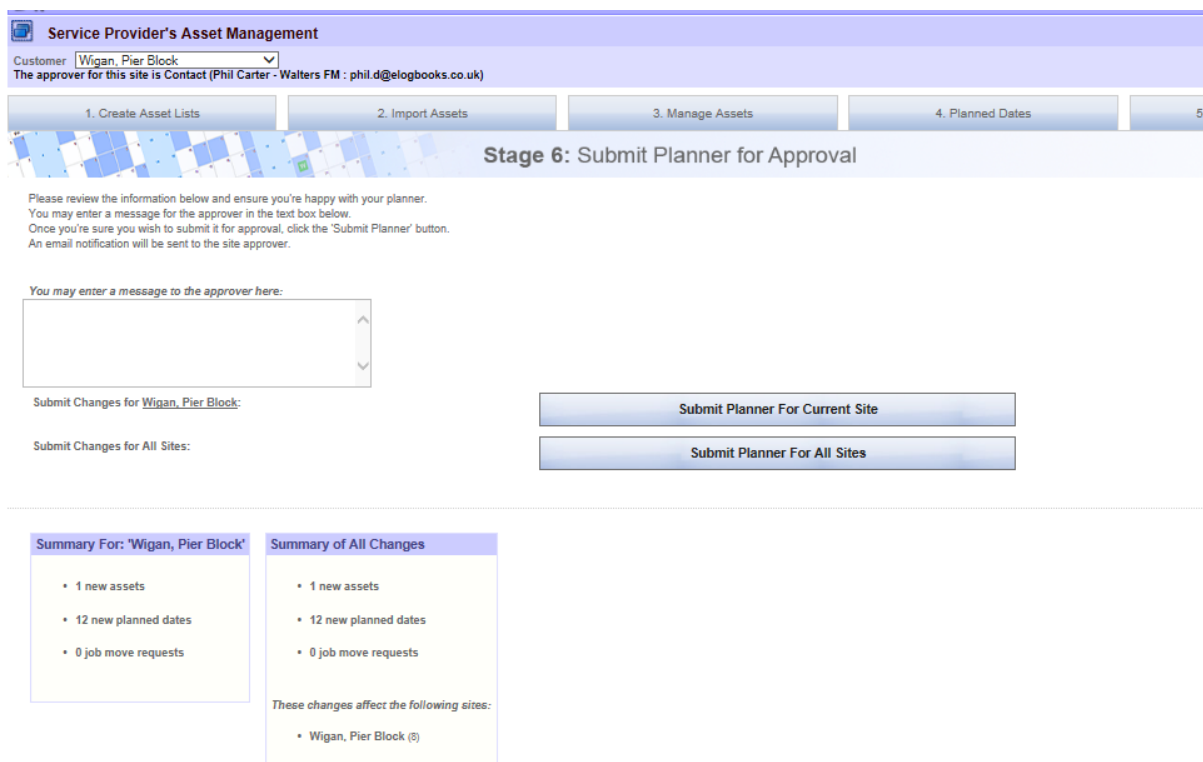
## Stage 6: Submit For Approval

When you are happy with your planner, you can then submit it for approval. This is done with the final tab, labelled “6. Submit For Approval”.

When you select a property from the drop-down list at the top, it will display the name and the email address of the property’s designated PPM Approver. You don’t need to know these details in order to submit a schedule for approval as the system will automatically email your submitted schedule to the approver. However, it’s always useful for you to know who the PPM Approver is at each of your client properties, as it may not always be the person that you deal with on a day-to-day basis.



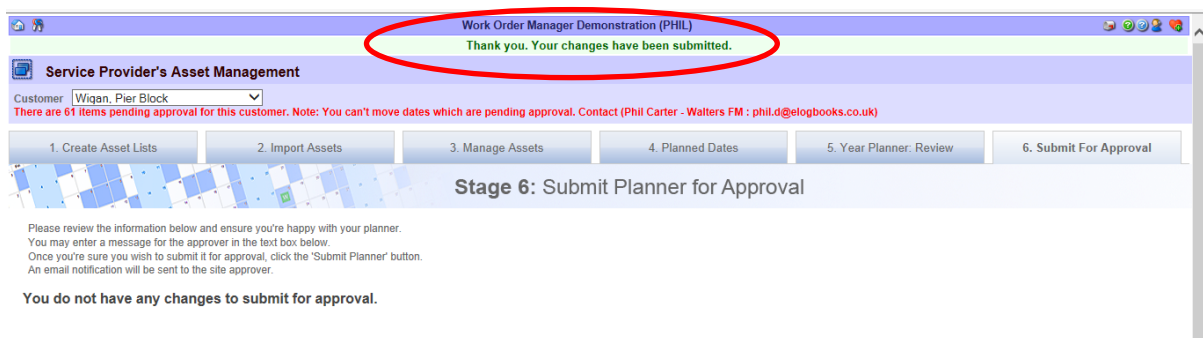
Further down the screen, a summary is provided of the **new assets** and **planned dates** that you have scheduled for the property you are viewing. If you have also uploaded assets and prepared a schedule for other properties, but have not yet submitted them for approval, these will be shown in the “Summary of all Changes” section.



Towards the top of the screen, you will see a text box into which you can enter a message for the approver(s). The text that you type here will be included in the emails sent to all of the PPM Approvers for the properties you are currently submitting PPM.

The two large control buttons in the centre of the screen allow you to submit the planner for the **current site** or for **all sites** that have as-yet un-submitted PPM that requires approval. We generally recommend that you submit PPM one property at-a-time while you get familiar with the process.

Once you've submitted a planner, you'll see a green message at the very top of the screen to confirm that the submission has been completed.



## What happens next?

The PPM Approver will receive an email with a link to review your submitted planner. They can either approve or reject the planner.

While you are waiting for rejection or approval, you cannot change any of the submitted planned dates (see the note in RED on the above screen grab, just below the property name).

If a planner is rejected, it will be rejected for the whole PPM schedule for that property - the Approver can't selectively reject individual tasks. You'll receive an email informing you of the rejection, and the Approver can optionally provide a reason for the rejection. If the schedule has been rejected, the email will contain the text typed in by the PPM Approver at the time of the rejection to indicate why the PPM schedule has been rejected. You can go back into tabs 3 and 4 to make the required corrections, then use tab 6 to re-submit the PPM.

Once your PPM schedule for a property has been approved, you'll receive an email telling you that the PPM has been approved. The "PPM" tab on your Service Providers logbook will display the approved planner, and the "Planned" tab will contain all of the individual planned jobs that go to make up the planner.



## **What if there is a delay in the Approval/Rejection?**

If there's a delay in the approval or rejection of your PPM schedule, you should in the first instance chase the PPM Approver concerned, and then escalate within the client if necessary. If appropriate, please contact us and we can also help to chase/escalate.

## **And if I need help?**

As mentioned in the introduction to this manual, it is your responsibility to create and maintain your PPM schedules, but we are always willing to assist you with this task. If you have any problems or questions, please email our technical support team at [Techsupport@elogbooks.co.uk](mailto:Techsupport@elogbooks.co.uk) , or you can call us on 01480 499740.



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