



Service

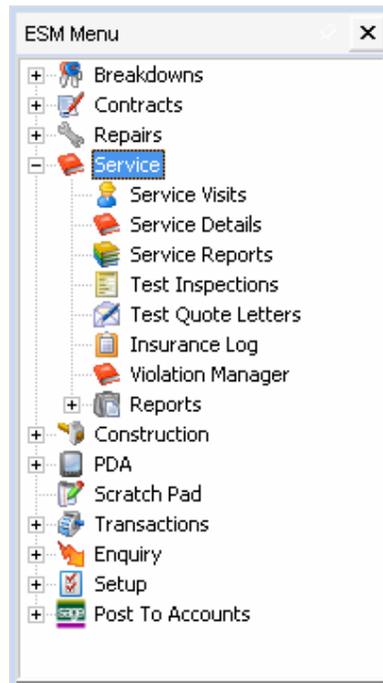
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1 Service Module

The service module provides a suite of programs that helps maintain service history for each elevator. Service due dates and various inspection due dates are automated by the system. The module provides the ability to maintain engineers elevator service reports which may be applied through to the repair module. Certification and service reporting are flexible features where the user may define custom layouts on a client/elevator basis.

The Service module is accessible via the main ESM menu bar or by displaying the individual service toolbar.



Or



Before you use the service module the following supporting records must be set-up. The following forms are located in the Setup -> Module Specific -> Service menu.

1. Standard Text Definitions
2. Visit Types
3. Report Types

Set up

1.1.1 Standard Text Definitions

Text definitions set-up are also used by the repairs module used to build repairs and quotations for an elevator. There is no limit to the amount of text definitions that can be set-up, but the text code must be unique

Code	Description	Rpt Type	Price
AAA	This is sample service text description type. You may setup as many type definitions as you like etc. The price is a default only, which may be adjusted at the time of quote.	1	£0.00
CD01	We recommend the installation of a door hold key switch within the lift car, to facilitate safe	1	£444.00
CD02	The existing mechanical, door safety edge requires physical contact and is therefore potentially dangerous.	1	£1,337.00
CD03	The existing car door air cord system is excessively worn/ splintered and requires replacement to ensure	1	£167.00
CD04	The existing car door shoes are excessively worn and require replacement to ensure continued safe and	1	£99.99
CD05	The car door operator and associated components are excessively worn and require replacement/	1	£167.00
CD06	The existing car door safety-edge flex wiring is faulty and requires replacement to ensure continued safe	1	£178.00
CD07	The existing car door gear driving belt/s are excessively worn and require replacement to ensure continued	1	£130.00
CD08	The car door running clearances are excessive and require adjustment/ component replacement.	1	£111.00
CD09	The existing car door hanger rollers are excessively worn and require replacement to ensure continued safe	1	£111.00
CD10	The car door vision panel is damaged and requires immediate replacement to ensure safe lift operation.	1	£88.00
DD01	The height of the existing car push station is not suitable for disabled persons. Consideration should be	1	£222.00
DD02	The height of the existing landing push stations is not suitable for disabled persons. Consideration should be	1	£333.00
LD01	To improve the performance of the lift between maintenance visits, consideration should be given to the	1	£195.00

To create a new definition select ADD this will bring up the following screen.

Add New Service Text

Text Code:

Description:

Report Type:

Total Price:

Materials Cost: Labour Hours:

Margin: Labour Rate:

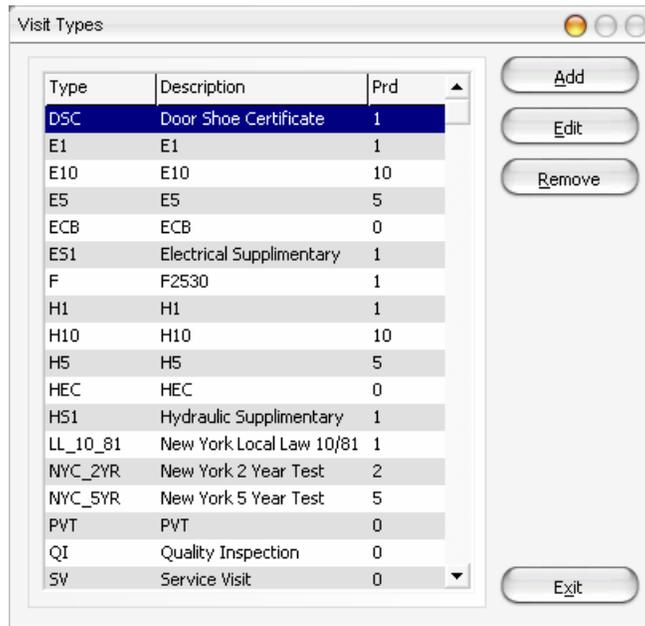
Labour Cost:

Buttons:

- Text Code:** Unique code to identify the service recommendation.
- Description:** Memo field with free format text.
- Report Type:** Used to control individual elements printed out in Service Reports.
- Price:** A price is built up entering material and labour hours to repair the problem. This may be updated at any stage
- Materials:** If the fault requires material this is the stage at which it is entered.

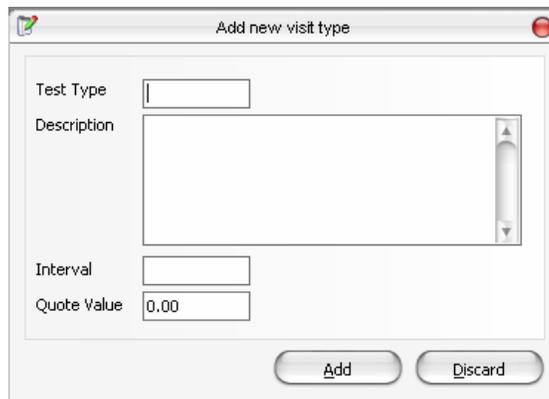
1.1.2 Visit Types

Visit types must be set-up before you can input service visits.



Each record contains the following;

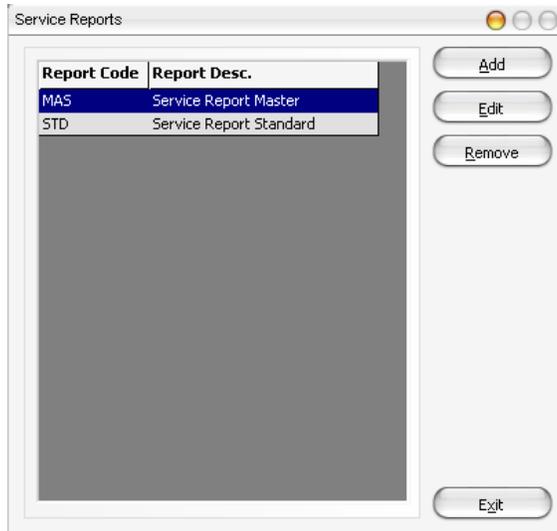
To create a new Visit Type select ADD this will bring up the following screen.



1. **Code:** Unique code to identify the visit type. SV is a system default for a standard service visit. Other systems defaults for [LG1 Inspections](#) are E1, E5, E10, H1, H5, and H10. You may add any other codes as you see fit. These will show up on any elevators history but not interfere with any service/LG1 due calculations.
2. **Description:** Description of visit type, shown on reports and various forms
3. **Prd:** Identifies LG1 period as in form above.
4. **Quote Value:** Enter the value you will charge for the visit.

1.1.3 Service Report Types

Before you can print an elevator service report in the Service Report routine you must set-up the report types required.



The routine identifies the service reports used by the application. Each record contains:

1. **Report Code:** A unique code for the report. Once set-up you may assign each elevator a report code in Elevator Records.
2. **Report Desc:** A description of the report. This must be the same name of the report filename you have set-up.

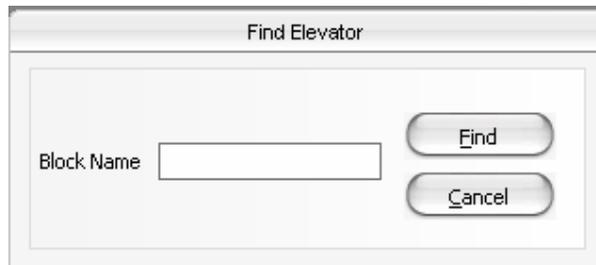
You may set-up as many service reports as you like. You will be provided with a standard template, after which you will require to purchase Seagate Crystal Reports to customise your own reports.



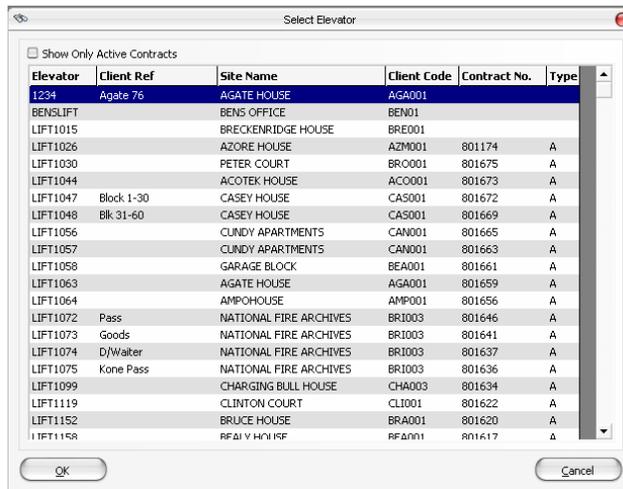
1.1.4 Service History Maintenance

To obtain access to this window open the Service Module go to Utilities on the tool bar and select Service History Maintenance then the window below will open

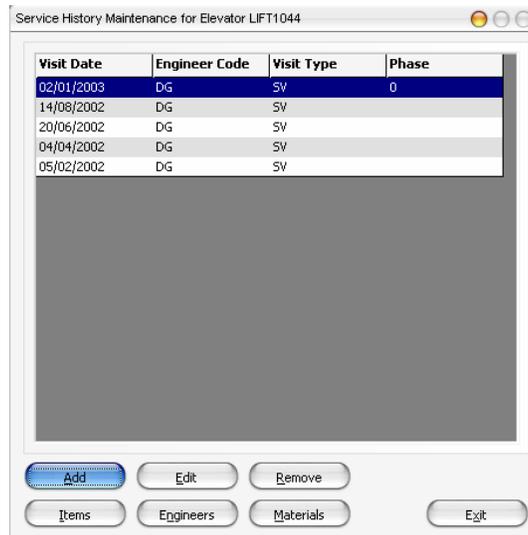
The following procedure will allow you to add services already carried out.



Select the Block Name the elevator is on.



Select Add to enter details of the service you wish to add to this elevator.



Select Add or one of the existing entries to edit.

The screenshot shows a window titled "Add Service History". It contains the following fields and controls:

- Elevator:** A text box containing "LIFT1044".
- Visit Date:** A date picker showing "24/07/2007".
- Visit Type:** A dropdown menu with a magnifying glass icon.
- Engineer Code:** A dropdown menu with a magnifying glass icon.
- Phase:** A text box.
- Time Spent:** A text box.
- Wait Time:** A text box.
- Travel Time:** A text box.
- Allocated Time:** A text box.
- Notes:** A large scrollable text area.
- Buttons:** "Add" and "Discard" buttons at the bottom.

This will open the window above showing the elevator code selected and the current date which can be amended if required. By using the magnifying glass you can select the Visit Type required and in the same manner select the Engineer who was allocated to carry out the Service. Finally enter the time on site to carry out the Service. You may now add 'items' used on the service.

1.2 Service Visits

Site visits are recorded and service due dates are maintained based on visits per annum.

To access Service visits open Service module and select Service Visit this will open the window below.

Elevator	Site Name	Visit Date	Type	Visits PA	Remind	Next Due Date	Last Visit	Phase
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An engineer submits a list of service visits performed over say a week (or as often as you require). The information is input as follows:

Engineer Code: Select an engineer code. A search button is provided. Once an engineer has been selected you may input the service visits. A grid is provided to input the service visit details

New: Select to add a service visit. The following window allows you to input visit details;

The screenshot shows a window titled "Add Service Visits". It contains the following fields and controls:

- Elevator:** A text input field with a search icon.
- Visit Type:** A dropdown menu showing "SV" and a "Service Visit" button.
- Last Visit:** A text input field.
- Due Date:** A text input field.
- Visits PA:** A text input field.
- Next Due Date:** A dropdown menu showing "24/07/2007".
- Visit Date:** A dropdown menu showing "24/07/2007".
- Last Phase:** A text input field.
- Put on Reminder List:** A checkbox.
- Allocated Service Time:** A text input field showing "0 Hours".
- Time On Site:** A text input field showing "0 Hours".
- Travel Time:** A text input field showing "0 Hours".
- Wait Time:** A text input field showing "0 Hours".
- Difference:** A text input field showing "0 Hours".
- Buttons:** "Add Details", "Items", "Engineers", and "Materials".
- General Notes For This Visit:** A large text area.
- Bottom Buttons:** "Add" and "Discard".

The form contains:

1. **Elevator Code:** A search button that activates an elevator search facility is provided. Once an elevator code has been selected the site name is displayed. The program will also show last service details including Visits PA and next service due date.
2. **Visit Type:** Indicates the type of visit carried out. The program defaults to SV (standard service visit code) held on the Visit Types form. You may input another code i.e. E1, E5 etc. if so the next due date becomes locked. You cannot change the next service due date if the visit type is not a service visit.
3. **Last Visit:** Displays the last service visit.
4. **Service Due Date:** Displays the last service due date.
5. **Visits PA:** Displays the service visits per annum set-up for the elevator in Elevator Records.
6. **Next Due Date:** The next due date is calculated - derived from the last service due and Visits PA. If the visit type is a service visit you may override the next due date.
7. **Reminder:** If selected this is printed on the reminder list in the reports routine.
8. **Allocated Service Time:** This is the time you have estimated to do the Service. The following fields will be the actual time taken.
9. **Time on site:** This will be the amount of time the engineer remained on site
10. **Travel Time:** As suggested the amount of traveling time
11. **Wait Time:** The amount of time the engineer has had to wait due to unforeseen circumstances.
12. **Difference:** The difference in the last screen is showing you if the service is indeed profitable.
13. **Add Details:** This allows you to select a pre-determined text that has been created in Utilities. See screen below.

Date	Code	Comments	Sort Type	Value	Status	Quote No.	Repair No.
24/07/2007	CD02	The existing mechanical, door safety edge requires physical contact and is therefore potentially dangerous. We recommend consideration be given to the installation of a full height infra red detector edge which would prevent the doors closing in the event of an obstruction.	1	1,337.00	Entered		
24/07/2007	CD07	The existing car door gear driving belt/s are excessively worn and require replacement to ensure continued safe and reliable operation.	1	£130.00	Entered		

14. **Items:** If items have been allocated to this type of service you will be able to select them from here.

You then select the 'ADD' button

Once all the visits have been logged for the engineer you may process the batch. Options are:

1. **Commit Batch:** Update site visits to Elevator Record and service history.
2. **Abandon Batch:** Clear current batch - all current records will be lost.
3. **Remove:** This will allow you to remove a Service Visit if required.
4. **Exit:** You will be prompted to save the batch. Select No to Abandon - Yes to Save.

1.3 Visit Types

1.3.1 Standard Visit Type

If the type is a service visit - SV:

- The last service visit date is updated.
- The next service due is calculated based on the visits per annum on Elevator Record.
- The previous service visit dates are shuffled along with the old service visit date.
- An entry is made in the service history archive.

1.3.2 LG1 Types

If the visit type is an LG1 type (H1, H5, H10, E1, E5, E10) the grid on the Elevator Record will be updated as follows:

- The last visit inspection date is updated.
- The before date value is updated with the previous date.
- The date due is calculated using the period value held on the Visit Types form.
- An entry is made in the service history archive.

To set-up LG1 history for an elevator you will need to input an E5, E10, H5 or H10. This will identify the 10 year cycle each elevator has (10.1.1.1.1.5.1.1.1.10). Further LG1 visits will be applied to the history as normal.

1.3.3 Other Types

Any other code types will be applied to the elevator history. It is possible to write your own custom reports with Seagate Crystal Report Writer.

1.4 Elevator Details

The form provides a facility to log problems/recommendations identified on the engineers report. Once the engineers service visit has been logged you may input any associated items for an elevator that requires attention. Any details recorded about the elevator may be reported by various service reports for internal purposes or at the clients request. Moreover any outstanding items may be picked up in the repair module and quoted for. At any time you will be able to see the position of any item on an elevator.

To access this form open the Service module and select 'Service Details' from the tool bar then select details. Then the following screen appears.

The screenshot shows the 'Service Details' window with the following data:

Elevator	LIFT1064	Client Ref		Site Address	AmpoHouse
Client	AMP001	Ampo Lodge		6 Perryfields	Finchley
Route	1	Route 1 Dave Granston	Visits PA	0	Dudley
Elev. Type	05	Hydraulic Passenger Lift 5P	No of Floors	3	ME5 555
1st, 2nd 3rd	14/08/02	31/05/02	27/03/02		

Report Date	29/01/03	Service Date	09/01/03	<input checked="" type="checkbox"/> Hide Completed Items
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Date	Text Code	Comments	Typ	Value	Status
09/01/2003	CD01	We recommend the installation of a door hold key switch within the lift car, to facilitate safe loading/unloading of the lift and prevent premature wear of door components.	1	444.00	Actioned
09/01/2003	CD05	The car door operator and associated components are excessively	1	167.00	Actioned
09/01/2003	L006	A maximum load plate stating weight and person capacity is	1	85.00	Actioned

Buttons at the bottom: Select, Print Report, View Report, Set To Print, No Print / Exit, Details, Exit.

The program also provides you with a facility to produce a service report. This may be done in the form or recorded to be printed later as a batch print. The options are:

1. **Select:** Used to select an elevator to process:
2. **Elevator Code:** Identify the elevator. A search button with search facility is provided
3. **Report Date:** Identifies the service report date, defaults to the system date.
4. **Service Date:** Identifies the service visit date. Defaults to the last service visit date. You must input a service visit date before you can input new elevator items requiring attention in the Service Report Details form.
5. **1st 2nd 3rd:** Displays previous service visits.

Once an elevator has been selected and its details are displayed the buttons below become available:

1. **Print Report:** Prints a service report for the elevator.
2. **View Report:** Previews a service report for the elevator.
3. **Set to Print:** Selects the elevator to print a service report in the Service Reports form. You may select another elevator or exit the form.
4. **No Print/Exit:** Quit processing the elevator. You may select another elevator or exit the form.
5. **Details:** Allows you to input/maintain items in the Service Report Details form

If you select 'Details' from the form above the following screen will open.

1.4.1 Service Report Details

Date	Code	Comments	Sort Type	Value	Status	Quote No.	Repair No.
09/01/2003	CD01	We recommend the installation of a door hold key switch within the lift car, to facilitate safe loading/unloading of the lift and prevent premature wear of door components.	1	£444.00	Actioned		C03001
09/01/2003	CD05	The car door operator and associated components are excessively worn and require replacement/ modernisation to ensure continued safe, reliable and economical operation. Price subject to full engineering survey.	1	£167.00	Actioned		C03001
09/01/2003	L006	A maximum load plate stating weight and person capacity is required within the lift car in compliance with current standards.	1	£85.00	Actioned		C03001

Buttons: Add, Edit, Remove, Items, Violations, Show Violations , Exit

The form provides a facility to record elevator details identified on the engineers report. Each record can have a status of;

- **Entered:** The item has been recently input and requires attention.
- **Pending:** The item has been quoted for in the repairs module. The Quote No identifies the quote the item is on.
- **Actioned:** The item has been accepted to be repaired by the client. The Repair No identifies the job number the item is on.
- **Completed:** The job the item in on has been invoiced and completed. A completed item may be removed by the using the deleted service details form in Utilities.

The options allowed are:

1. **Add:** Activates the Service Report Details dialogue form below to create a new service entry for the elevator
2. **Edit:** Edit an exiting item in Service Report Details dialogue form below.
3. **Remove:** This will remove the currently selected entry.

By selecting the Add button you are able to enter a new text definition or using the Edit button you are able to amend definitions already created.

1.4.2 Service Report Details Dialogue

The screenshot shows a dialog box titled "Edit Service Information for Elevator (LIFT1064)". It contains the following fields and values:

Text Code	CD01
Comment	We recommend the installation of a door hold key switch within the lift car, to facilitate safe loading/unloading of the lift and prevent premature wear of door components.
Status	Actioned
Rep Type	1
Value	444.00
Service Date	09/01/2003

At the bottom of the dialog box are two buttons: "OK" and "Discard".

The forms contains:

1. **Text Code:** Identifies the text definition found in the Standard Text Definitions Form. A search option will list standard text definitions. Once selected the text comments associated to the code will be displayed in the comment field. If you cannot find a relevant definition you may input a code beginning with letter T (T Code). A T code is a custom code, you may have as many T codes as you wish as long as the code is unique for each elevator. You will be required to input the comments from a blank position.
2. **Comments:** Derived from the text code selected above. The field may be amended.

3. **Status:** Identifies the current status of the item. If you need to - you may set the status back - if so the record will not be synchronised with status in a quote/job in the repair module.
4. **Rep Type:** Indicates the text analysis type. The field is a reference field and defaults to 1. May be used to define details in custom Service reports. Service Reports can be set-up in a way that only certain text types are required, or service details may be grouped by type.
5. **Value:** Identifies the cost to repair the item. Defaults to the price held on the record found in the Standard Text Definitions Form. The field may be amended.
6. **Service Date:** Defaults the service date selected in the elevator details form.

1.5 Service Reports

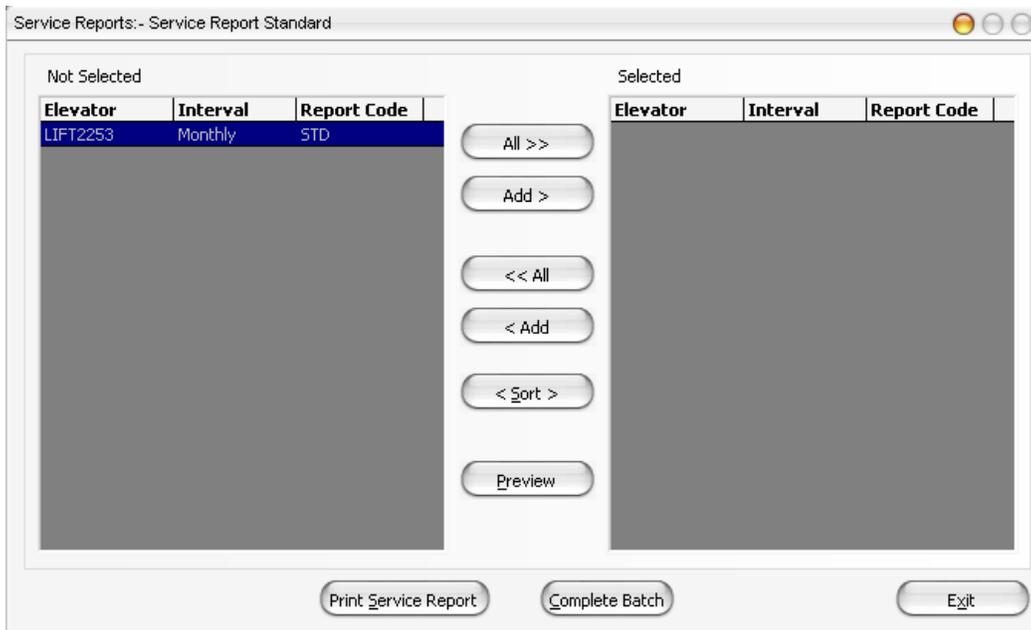
The form provides a facility to produce a batch of services reports by report type.

To access this form open the Service menu and select 'Service Reports' button from the tool bar.



The dialog box titled "Select Service Report" contains a "Service Report Code" label next to a blue dropdown menu. To the right of the dropdown are two buttons: "Process Batch" and "Cancel".

Select the report type you wish to process (STD or MAS) and select process batch. Service report codes are identified in the Report Type form. Any elevators selected to Set to print in the Elevator Details form will be listed.



The window titled "Service Reports: - Service Report Standard" is divided into two panes: "Not Selected" and "Selected".

Not Selected		
Elevator	Interval	Report Code
LIFT2253	Monthly	STD

Between the panes are several buttons: "All >>", "Add >", "<< All", "< Add", "< Sort >", and "Preview".

Selected		
Elevator	Interval	Report Code

At the bottom of the window are three buttons: "Print Service Report", "Complete Batch", and "Exit".

The report name based on the report code selected is displayed in the form title. Each elevator has a service report code set-up. The elevator must have the same report code set-up in Elevator Records as selected by the program. There are two lists, not selected and selected. Only service reports for elevators found in the selected list will be printed. Options are:

1. **All Buttons:** Select button to put all the elevators in one list. A Button is available for each list.
2. **Add Buttons:** Select button to toggle the highlighted elevator from the current list to other. You may also use the mouse to double click on the highlighted invoice, or use the enter key to toggle.
3. **Sort:** Select to sort both lists in elevator code sequence.
4. **Preview:** Select to activate a preview window of the service report.
5. **Print Invoices:** Select to print the batch of service reports.
6. **Complete Batch:** Select the button to complete the batch and set all the elevators in the selected list not to print in the next service batch report.