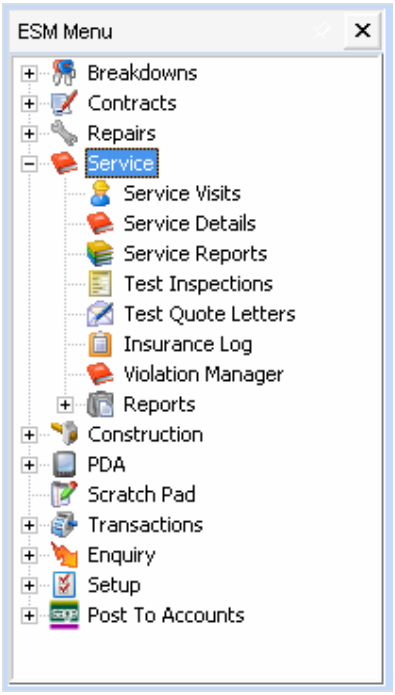
Service

Contents

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

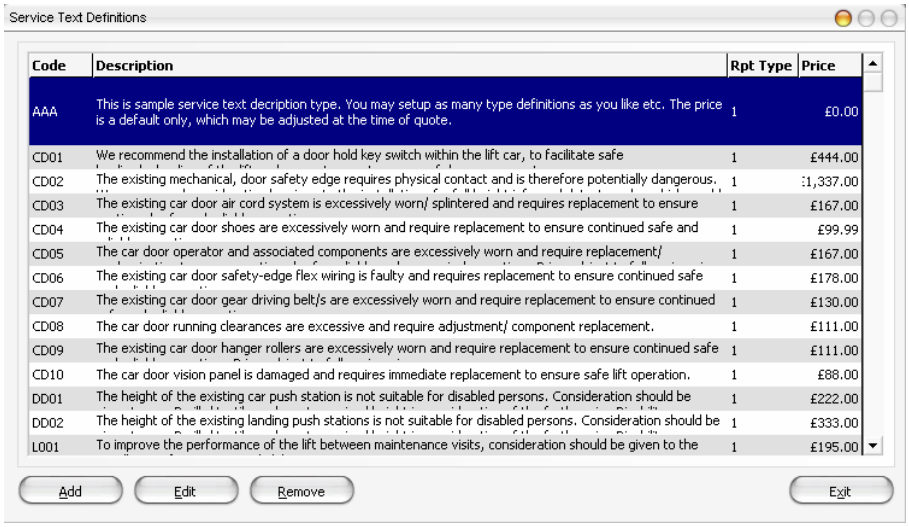
Before you use the service module the following supporting records must be set-up. The following forms are located in the Setup -> Module Specific -> Service menu.

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

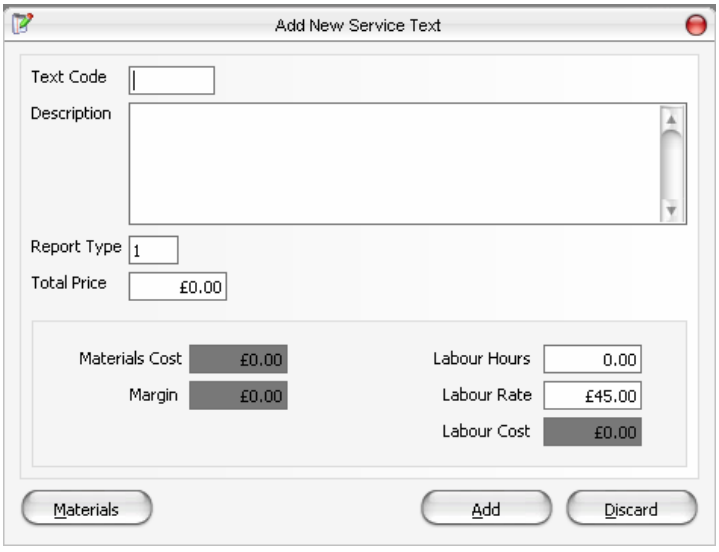
Set up

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



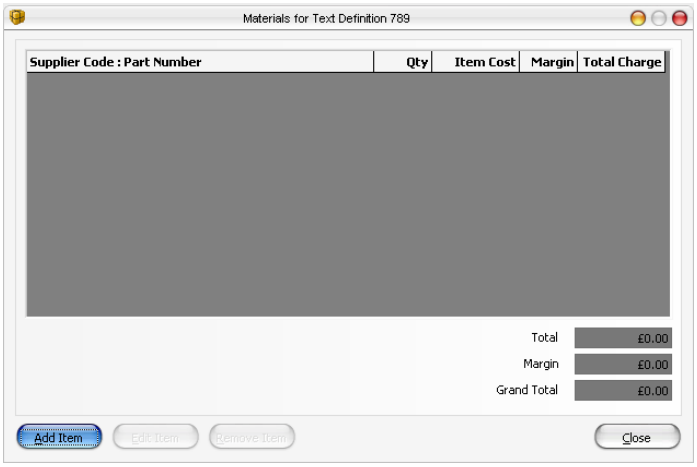
To create a new definition select ADD this will bring up the following screen.



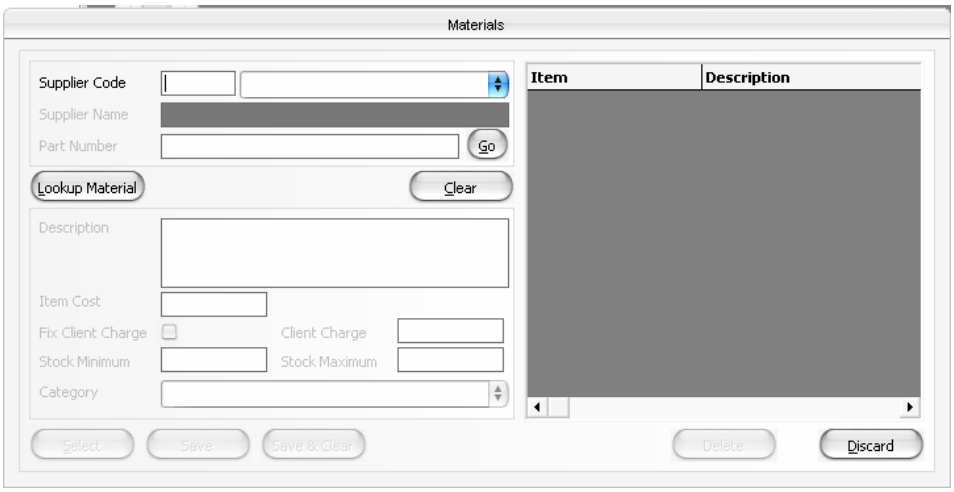
1. **Text Code:** Unique code to identify the service recommendation.
2. **Description:** Memo field with free format text.
3. **Report Type:** Used to control individual elements printed out in Service Reports.
4. **Price:** A price is built up entering material and labour hours to repair the problem.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

6. **ADD:** adds the information to the text definition.
7. **Discard:** removes any information you may have entered.

Click on the “Materials” button to select any materials.

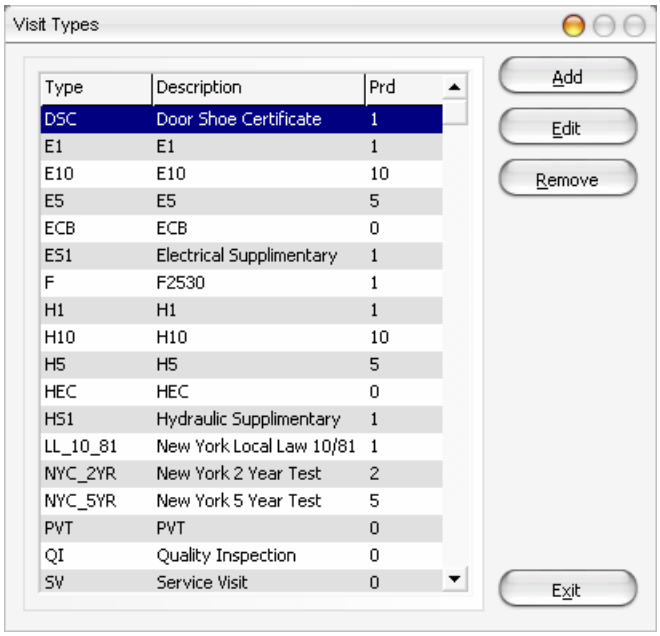


Select Add item



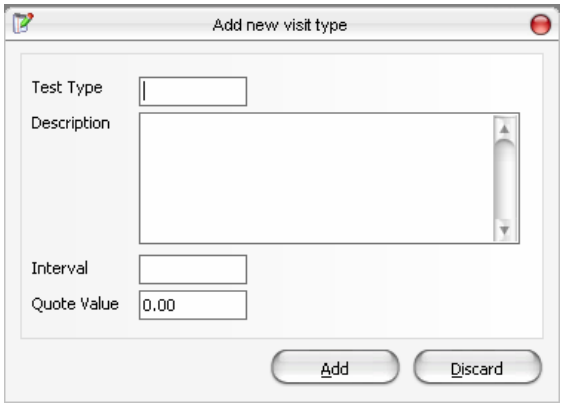
1.1.2 Visit Types

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



Each record contains the following;

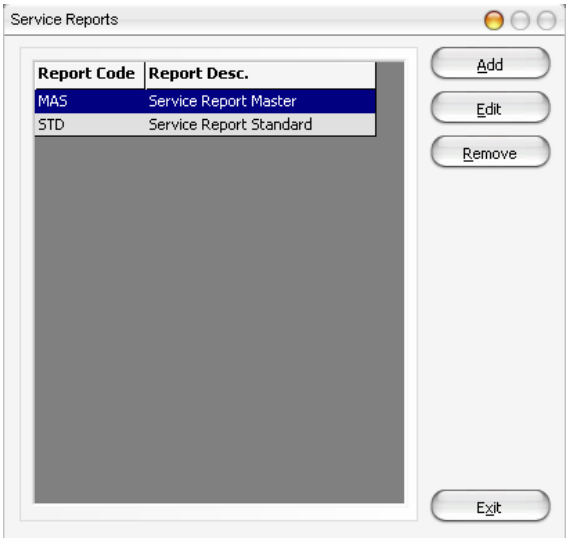
To create a new Visit Type select ADD this will bring up the following screen.



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.



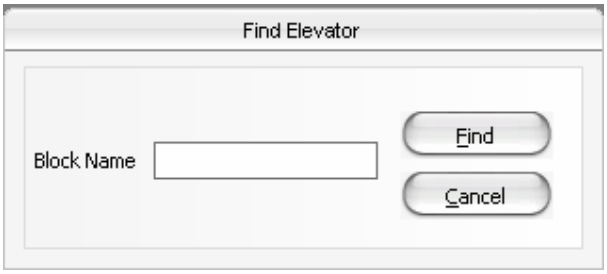
The routine identifies the service reports used by the application. Each record contains:

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.

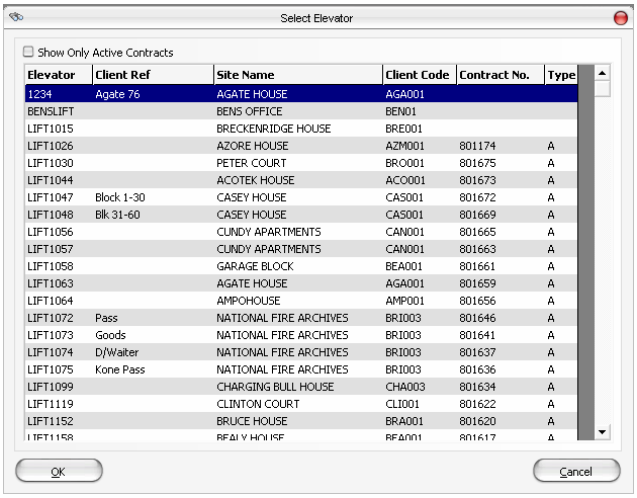
You may set-up as many service reports as you like. You will be provided with a standard template, after which you will require to purchase Seagate Crystal Reports to customise your own reports.

1.1.4 Service History Maintenance

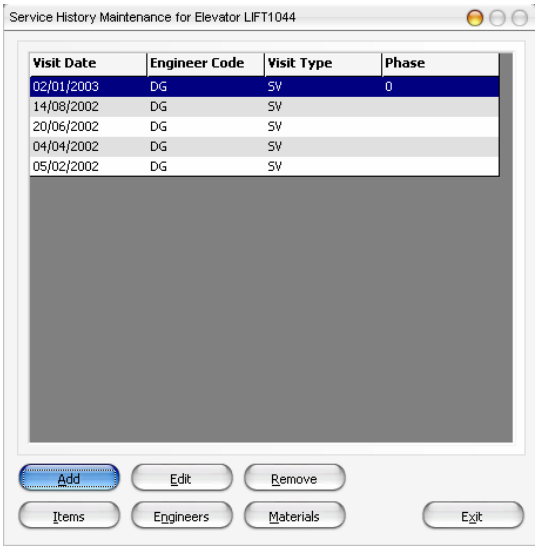
To obtain access to this window open the Service Module go to Utilities on the tool bar and select Service History Maintenance then the window below will open
The following procedure will allow you to add services already carried out.



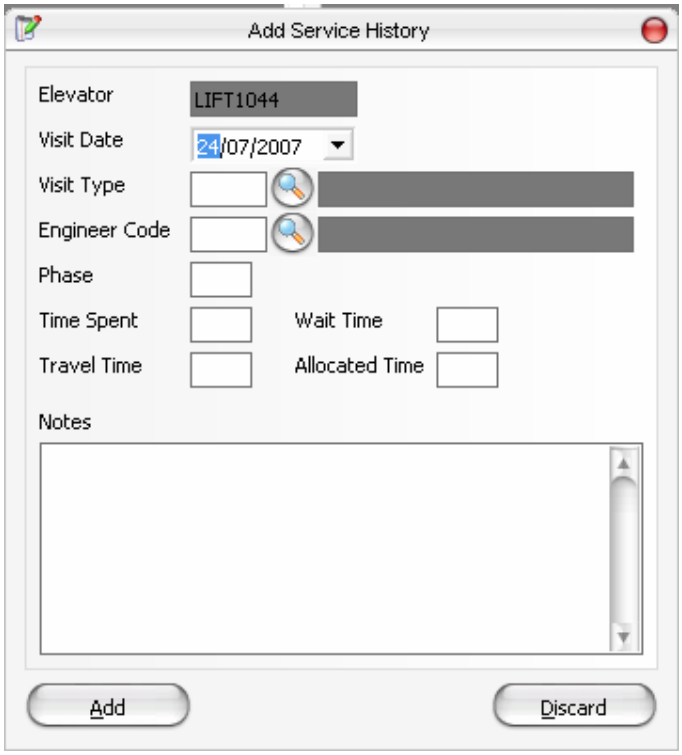
Select the Block Name the elevator is on.



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



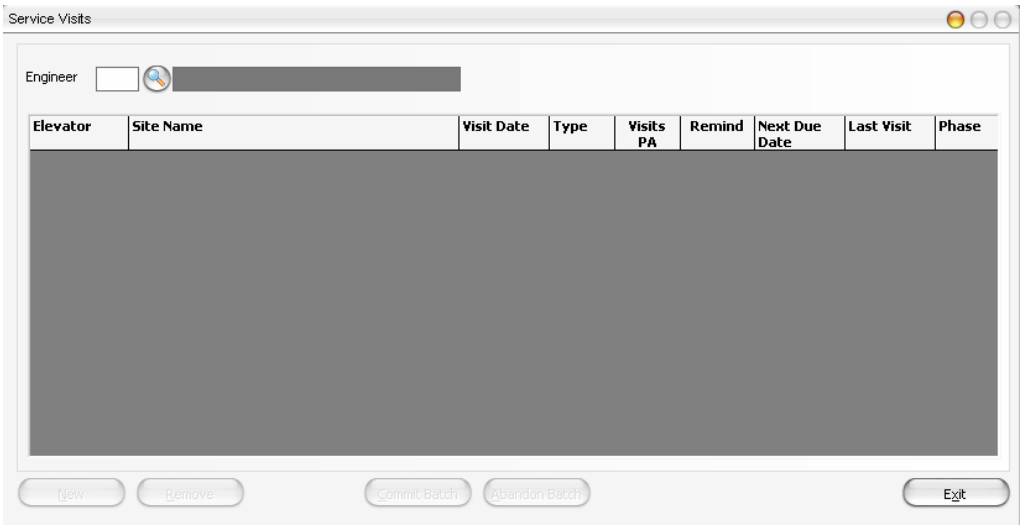
Select Add or one of the existing entries to edit.



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

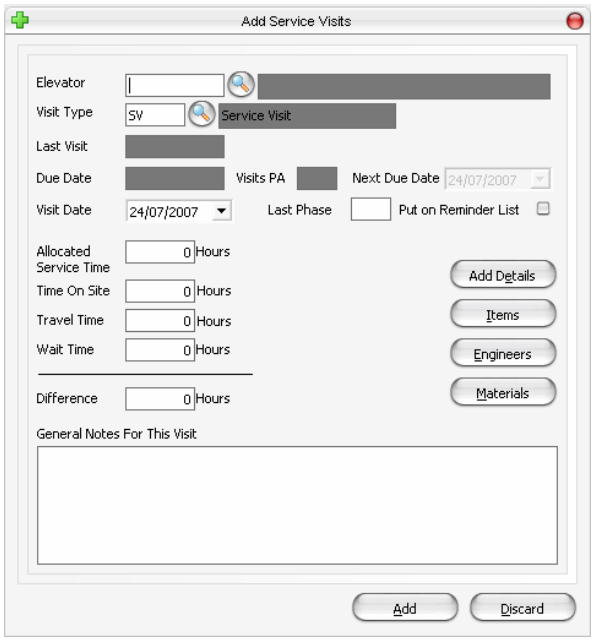
Site visits are recorded and service due dates are maintained based on visits per annum.
To access Service visits open Service module and select Service Visit this will open the window below.



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:

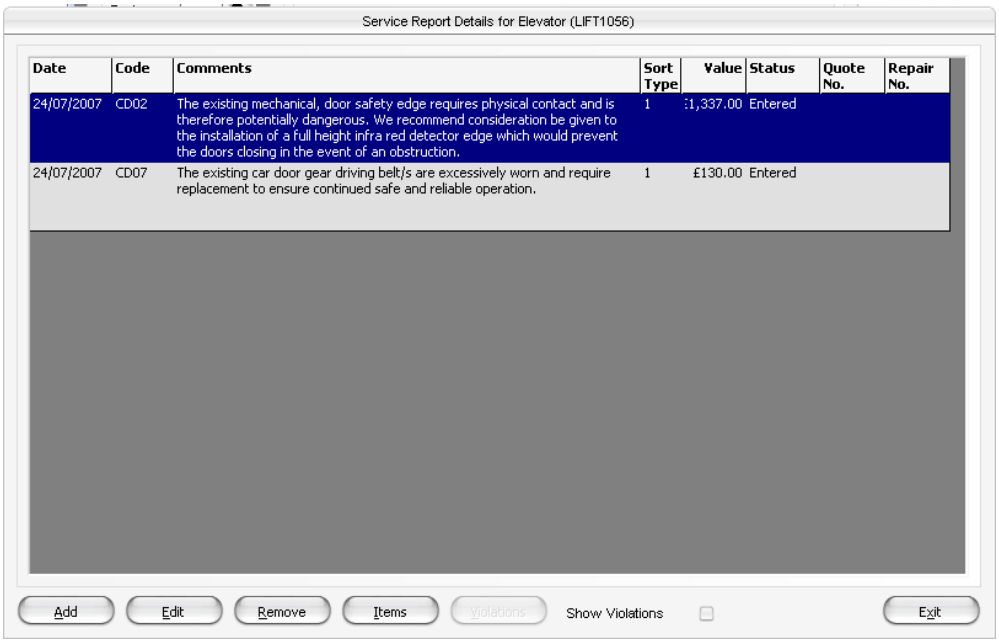
Engineer Code: Select an engineer code. A search button is provided. Once an engineer has been selected you may input the service visits. A grid is provided to input the service visit details

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



The 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.



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 (10.1.1.1.1.5.1.1.1.1.10). Further LG1 visits will be applied to the history as normal.

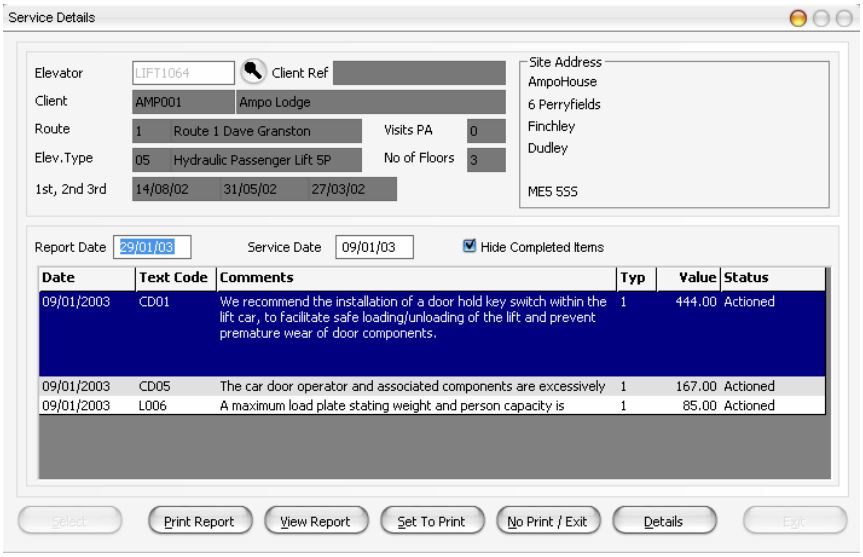
1.3.3 Other Types

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 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:

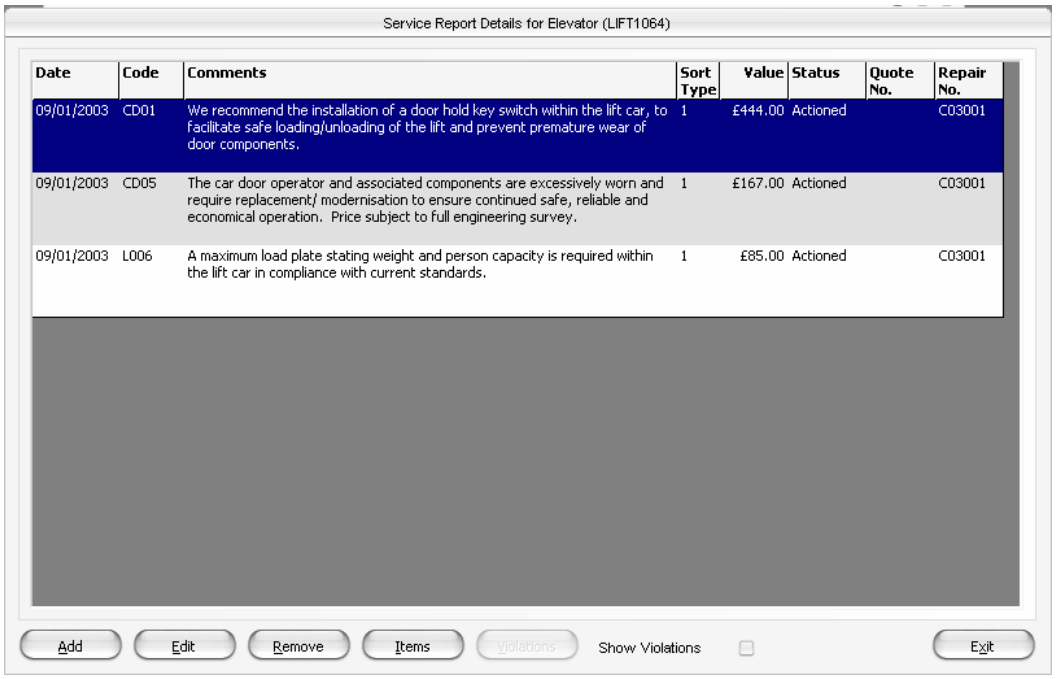
1. **Select:** Used to select an elevator to process:
2. **Elevator Code:** Identify the elevator. A search button with search facility is provided
3. **Report Date:** Identifies the service report date, defaults to the system date.
4. **Service Date:** Identifies the service visit date. Defaults to 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



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

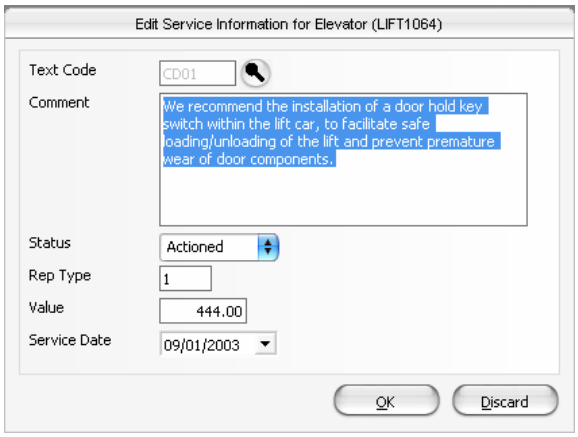
- **Entered:** The item has been recently input and requires attention.
- **Pending:** The item has been quoted for in the repairs module. The Quote No identifies the quote the item is on.
- **Actioned:** The item has been accepted to be repaired by the client. The Repair No identifies the job number 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



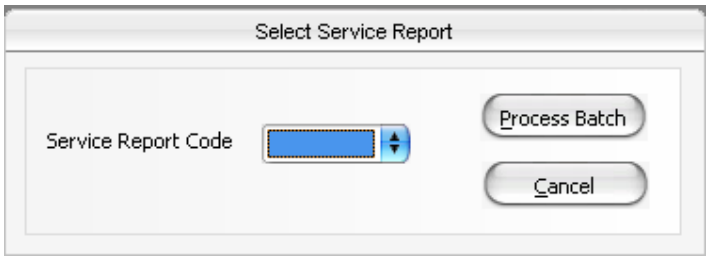
The forms contains:

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.

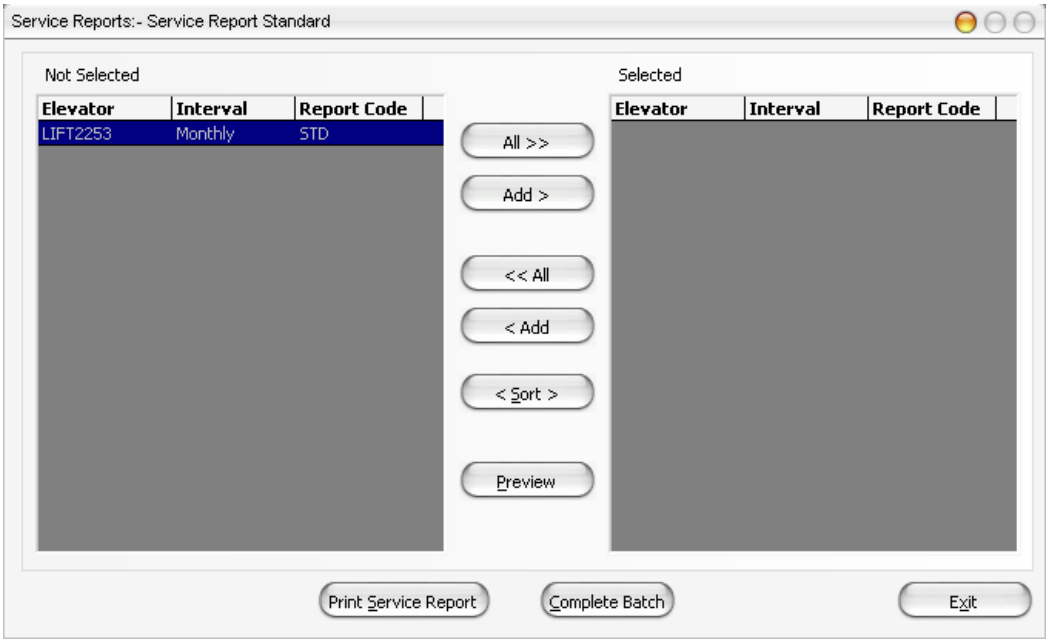
3. **Status:** Identifies the current status of the item. If you need to - you may set the status back - if so the record will not be synchronised with status in a quote/job in the repair module.
4. **Rep Type:** Indicates the text analysis type. The field is a reference field and defaults to 1. May 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.



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 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.