

How to:

Manage your Insurance Inspection, Non-Conformances in ESM

This document describes how to (Setup and) manage insurance inspection non-conformances through ESM, using the Web PDA.

The process allows you to;

- log non-conformances
- monitor actions against non-conformances
- create repair quotes (through Repair module)
- create repairs, allocating non-conformance rectification to the engineer, followed by completing and billing, as appropriate. (through Repair module)
- A number of reports are inbuilt to monitor progress

- - - Further Notes Will Go Here - - -

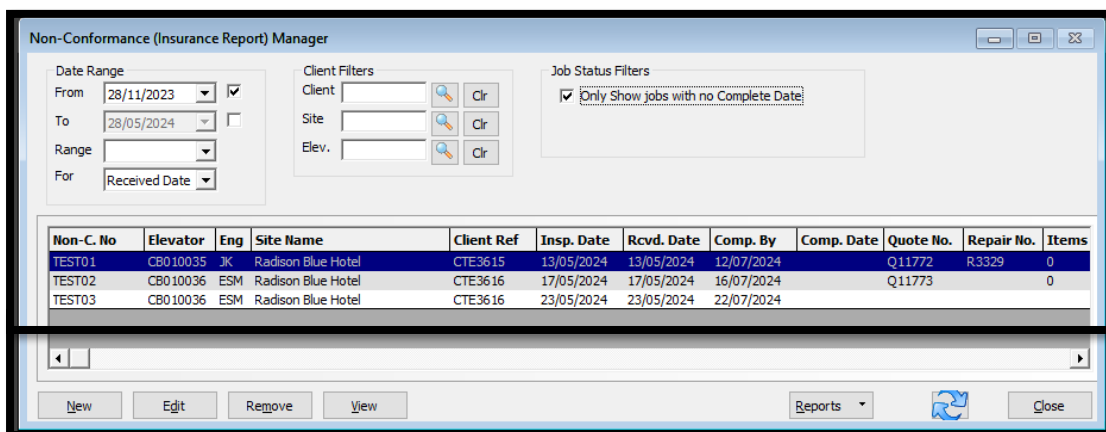
1. Setup – Non Conformance, Completion Date default.

The only requirement is to confirm the default ‘to be Completed’ timescale, that is the allowed defect rectification period. The default is initially set at 60 days. Once created, individual non-conformances can be updated by editing the record.

Go to Setup>>Control Settings>>Servicing tab: Non Conformances - To be Completed (days) >>Update

2. Non Conformance Manager

The Non Conformance Manager shows your list of Insurance Report non-conformances, by default for the last 6 months and ‘incomplete jobs.’ Longer periods and Complete jobs can be viewed by updating the filters.



Several Reports are included to monitor progress



Highlight a job and click 'Edit to view individual non-conformances.

There are 3 tabs:

- Details, shows all the non-conformance information and any associated Repairs or Quotes
- Notes, free text notes can be added to each non-conformance
- Attachments, linked attachments, such as the provided Insurance Report document that can be stored in the Document Manager (or elsewhere).

Non-Conformance Editor - Edit

Details | Notes | Attachments

Non-Conf. Job: TEST01 Items Identified: 0

Elevator	CB010035	Site Number	177	Site Address Radisson Blue Hotel 20 London Road Seapoint Cape Town 8002
Elevator Type	01 Elevator	No of Floors	0	
Client Ref	CTE3615	Ref No	0	
Client	1013 Radisson Blue Hotel			
Route Number	12 12Cpt	Visits PA	12	
Engineer	JK Javed Khan			

Non Conformance Key Dates

Inspection Date: 13/05/24

Received Date: 13/05/24

Repair To Be Completed By Date: 12/07/24

Repair Completed Date: //

Linked Jobs

Quote No.: Q11772 Rev: 0

Repair No.: R3329

Change Non-C. Number
Change Engineer
Save & Exit
Discard & Exit

Non-Conformance Editor - Edit

Details | Notes | Attachments

Enter general notes for the non-conformance here

Enter notes here

Non-Conformance Editor - Edit

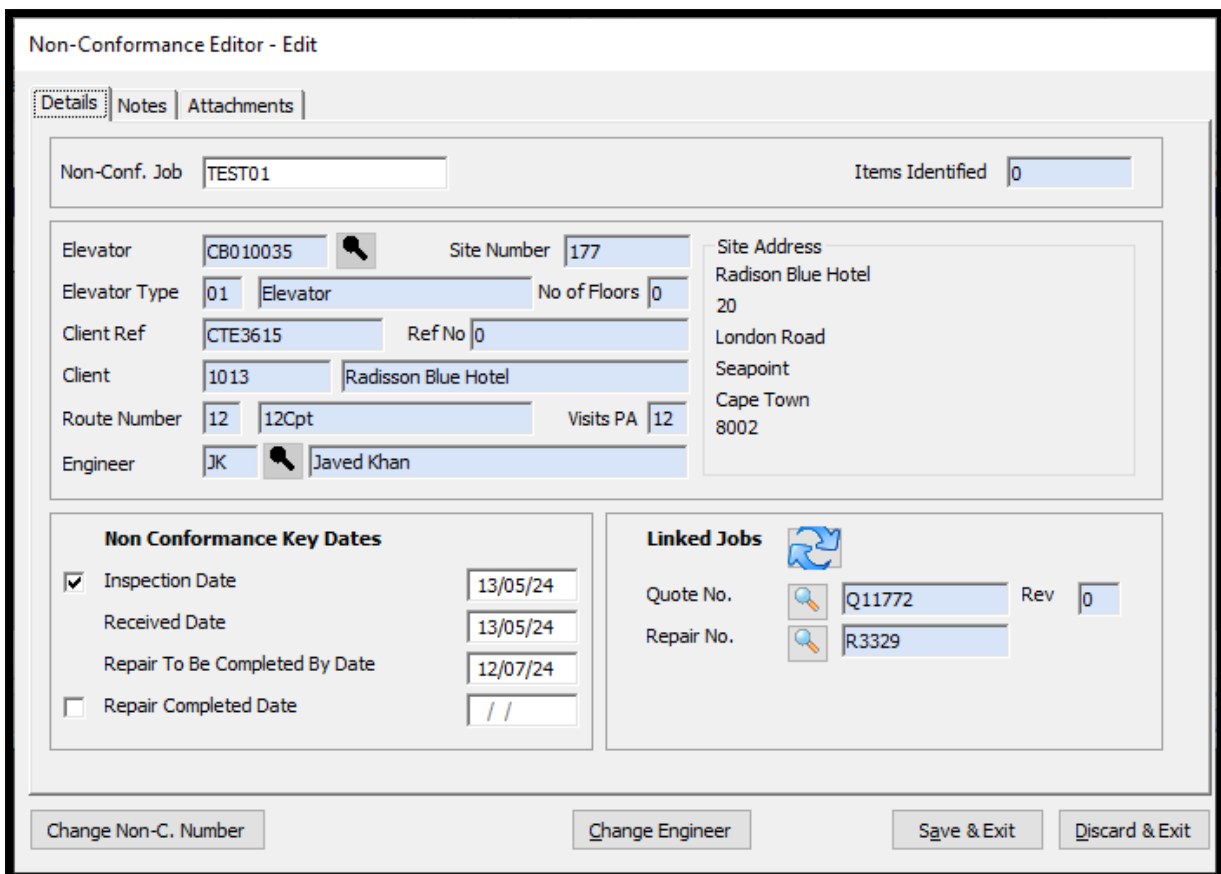
Details | Notes | Attachments

Attach documents to the non-conformance

Name	Created	Modified	Type	Size
...ager Overview and Development	28/05/2024	30/01/2024	PDF File	219.5 KB

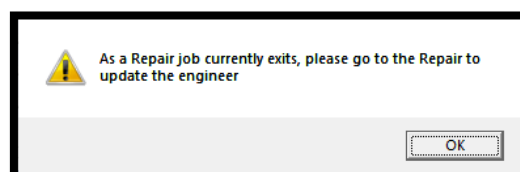
3. Non Conformance Editor

- **Non-Conf. Job** – this is the unique number or code that identifies the job, possibly the Insurance Report Reference provided by the Client. ESM will check the 'code' is unique!
- **Items Identified** – for building up the non-conformance and remedy items - to be updated later!
- **Elevator and Engineer** (allocated) details. Engineer details which can be updated later via the Repair
- **Non Conformance Key Dates:** all dates can be changed as required
 - **Received Date:** date the non-conformance was entered in ESM
 - **Inspection Date:** by default this is the same date as the Received date
 - **Repair to be Completed Date:** corresponds with the earlier setup (Received +60 day default)
 - **Repair Completed Date:** entered manually or will be updated from associated Repair
- **Linked Jobs** (auto updated on window load)
 - **Refresh button** to update most recent changes to Quote, Repair and Engineer.
 - **Quote No:** associated (repair) Quote, updated from 'Linked' Quote and subsequent revisions
 - **Repair No:** associated Repair job



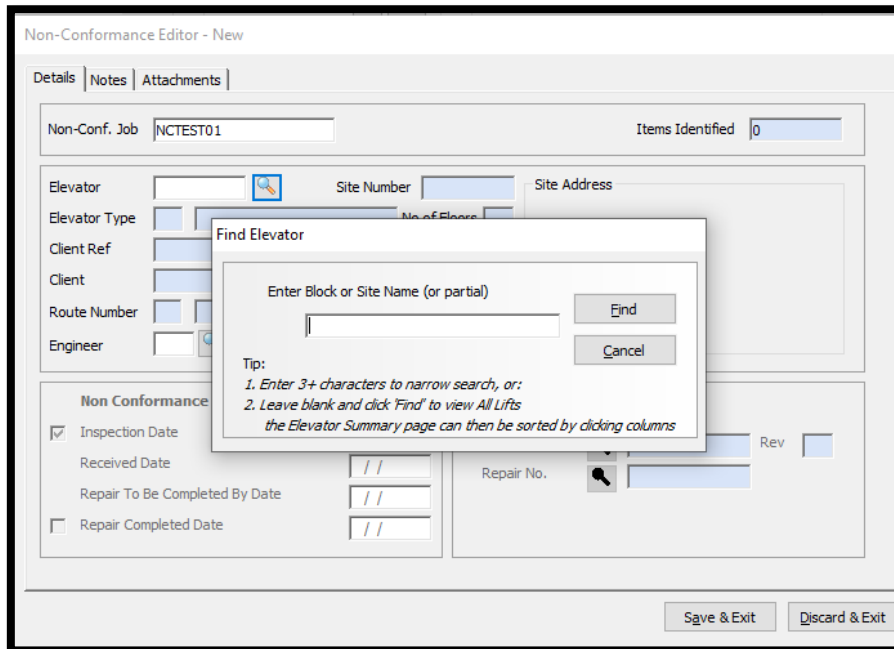
Once entered, if required, any subsequent change to the non-conformance Job no. should be done using the Change Non-C Number

Likewise the Change Engineer button can be used to update the engineer allocated, however if a Repair job exists, the engineer change should be effected there!



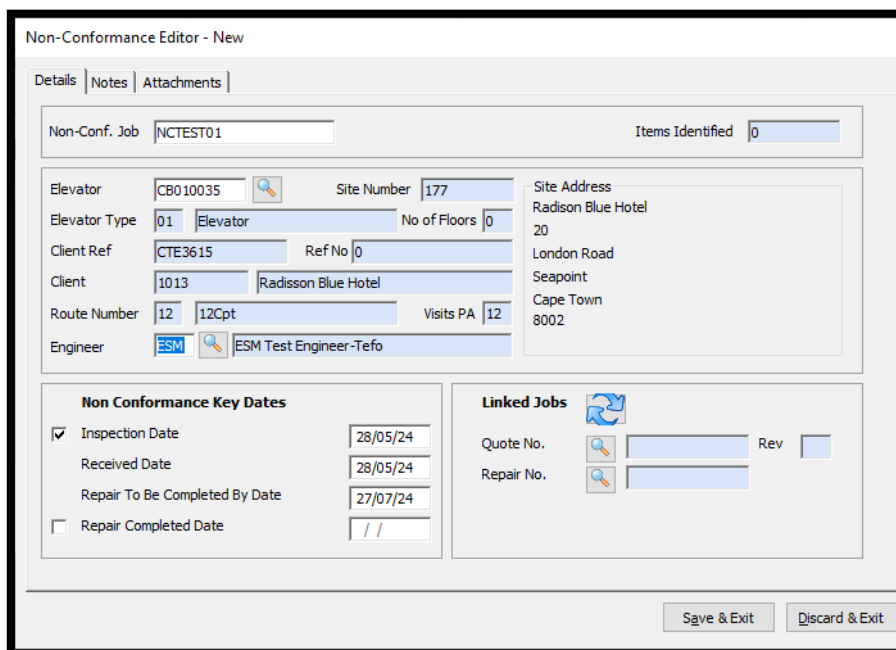
4. Create new Non Conformance

- In Non Conformance Manager, click 'New' and enter **unique** Non-Conf. Job number.
- Click the 'magnifier' button against Elevator, to search for the required Lift.



The screenshot shows the 'Non-Conformance Editor - New' window. The 'Non-Conf. Job' field contains 'NCTEST01' and 'Items Identified' is '0'. The 'Elevator' field has a magnifier icon. A 'Find Elevator' dialog box is open, prompting the user to 'Enter Block or Site Name (or partial)'. The dialog includes 'Find' and 'Cancel' buttons. A tip is displayed: 'Tip: 1. Enter 3+ characters to narrow search, or; 2. Leave blank and click Find to view All Lifts the Elevator Summary page can then be sorted by clicking columns'. The background form shows fields for 'Elevator Type', 'Client Ref', 'Client', 'Route Number', and 'Engineer'. Below these are 'Non Conformance' key dates: 'Inspection Date' (checked), 'Received Date', 'Repair To Be Completed By Date', and 'Repair Completed Date' (unchecked). 'Repair No.' and 'Rev' fields are also visible.

- Non Conformance Key Dates are auto in accordance with defaults

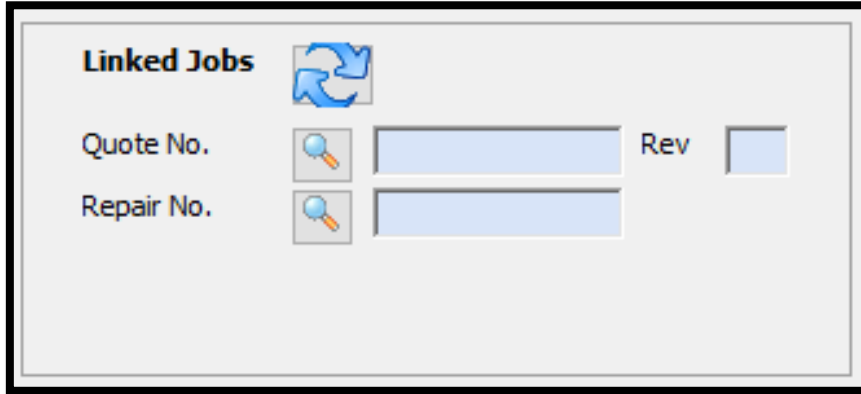


The screenshot shows the 'Non-Conformance Editor - New' window with fields populated. 'Non-Conf. Job' is 'NCTEST01' and 'Items Identified' is '0'. The 'Elevator' field is 'CB010035', 'Site Number' is '177', and 'Elevator Type' is '01 Elevator'. 'Client Ref' is 'CTE3615', 'Ref No' is '0', and 'Client' is '1013 Radisson Blue Hotel'. 'Route Number' is '12', 'Visits PA' is '12', and 'Engineer' is 'ESM Test Engineer-Tefo'. The 'Site Address' is 'Radison Blue Hotel, 20, London Road, Seapoint, Cape Town, 8002'. The 'Non Conformance Key Dates' section shows: 'Inspection Date' (checked) as '28/05/24', 'Received Date' as '28/05/24', 'Repair To Be Completed By Date' as '27/07/24', and 'Repair Completed Date' (unchecked) as '//'. The 'Linked Jobs' section shows 'Quote No.' and 'Repair No.' fields with magnifier icons. 'Save & Exit' and 'Discard & Exit' buttons are at the bottom.

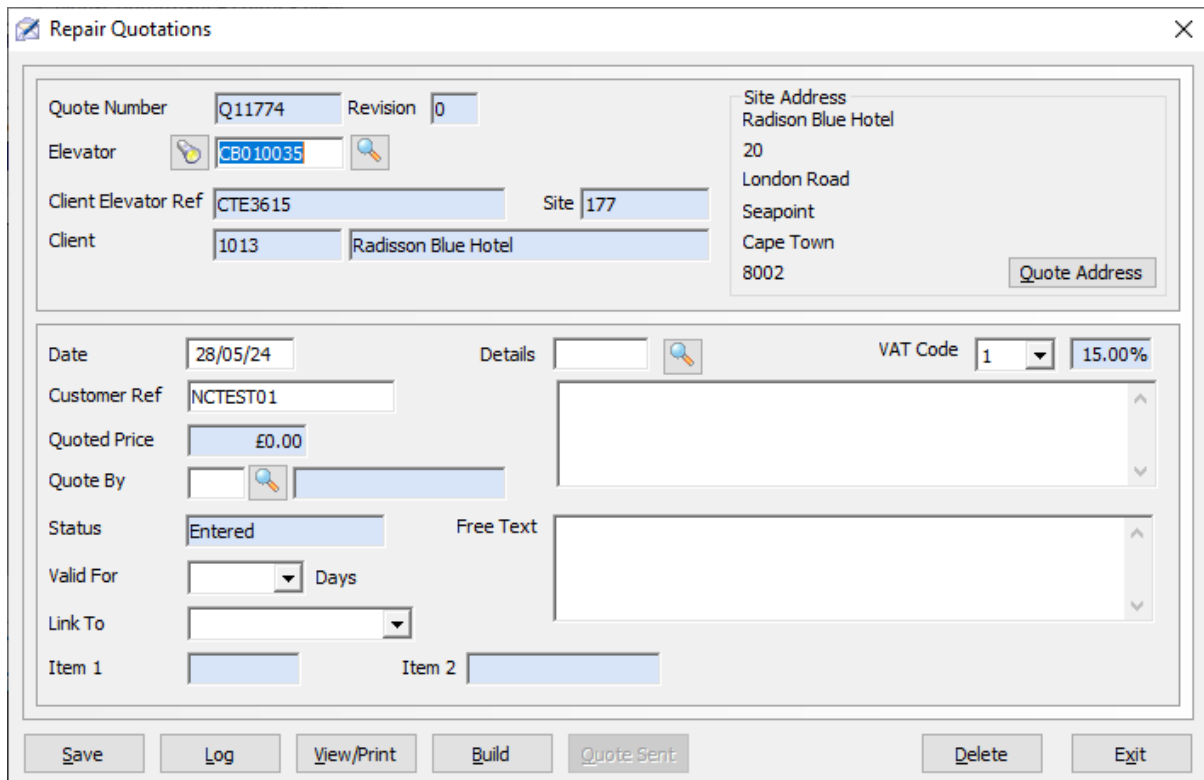
- Click Save & Exit to save. The job will be visible in the Non Conformance Manager for further edits.

5. Create (Repair) Quote from Non Conformance

- Open (click Edit) the desired Non Conformance
- To create a new (repair) Quote, click the magnifier button next to Quote No.



- This opens a (Repair) Quotations window from the Repairs Module, as below. The Quote uses the next sequential Quote No. and references the non conformance elevator automatically.
- The Customer Ref. is automatically added as the non conformance number



- Quote By, Valid For and Details are added as normally in (repair) Quotations.

- Link the Quote to the Non-Conformance with 'Link To,' as normally in (repair) Quotations
- Click the drop down and select Non Conf. The non-conformance number from the Customer Ref. is automatically added to complete the reference. This updates the Non Conformance with the Quote No. and Quote Revision, when the Non Conformance window is reloaded or the 'Linked jobs' button is clicked.

The image illustrates the process of linking a quote to a non-conformance record. It consists of three main panels:

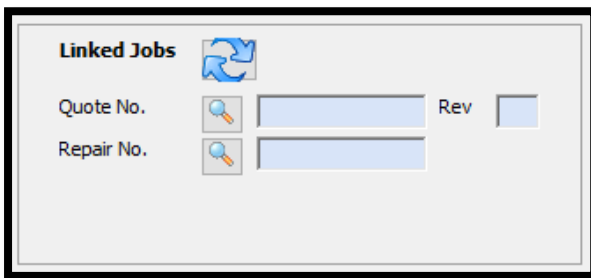
- Quote Details Panel (Top Left):** Shows a quote for Customer Ref NCTEST01, dated 28/05/24, with a quoted price of £0.00. The 'Link To' dropdown menu is open, showing options: None, Breakdown, Service, Repair, Test, and NonConf. A red arrow points from the 'NonConf' option to the 'NonC No.' field in the next panel.
- Quote Details Panel (Top Right):** Shows the same quote details, but the 'Link To' dropdown is now set to 'Non Conformance' and the 'NonC No.' field contains 'NCTEST01'. A red arrow points from this field to the 'Non-Conform. Job' field in the next panel.
- Non-Conformance Editor - Edit Panel (Bottom):** Shows the details for Non-Conform. Job NCTEST01. The 'Items Identified' field is 0. The 'Linked Jobs' section shows a quote number of Q11774 and a revision of 0. A red arrow points from the 'Quote No.' field back to the 'Non-Conform. Job' field in the top left panel.

Note: Quotes can be built and converted to a Repair as normal in the Repairs module.

6. Create Repair from Non Conformance

Note: as previous a Repair can be created from the Quote created earlier, but if no Quote is required (or it's more convenient from the Edit Violation window) a Repair can be generated directly.

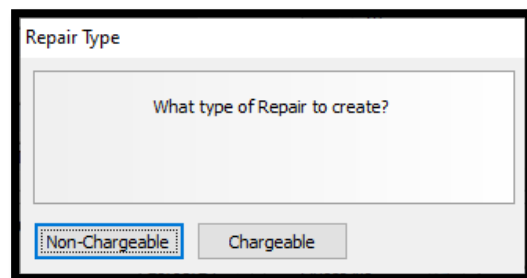
- To create a new Repair, click the magnifier button next to Repair No. as below
- A Repair 'Type' window opens from the Repairs Module, as below. Select as required to open the Repair job



Linked Jobs

Quote No. Rev

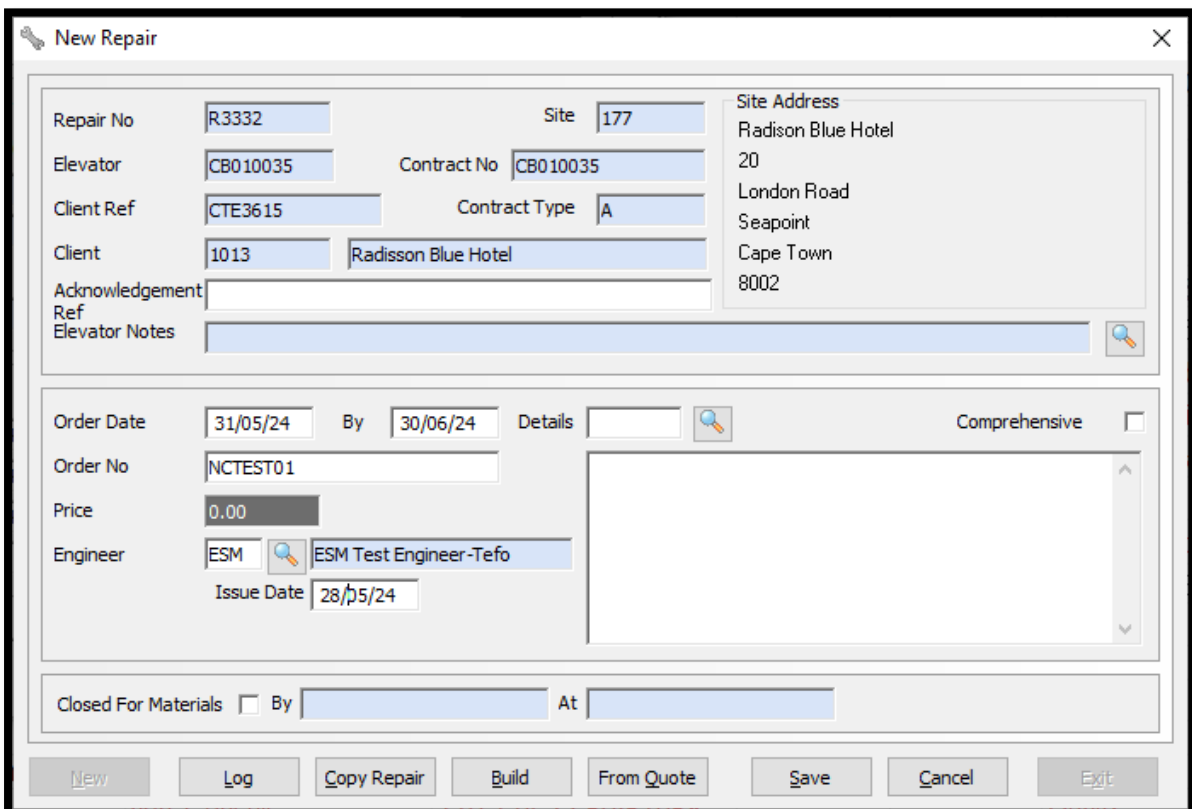
Repair No.



Repair Type

What type of Repair to create?

Non-Chargeable Chargeable



New Repair

Repair No Site

Elevator Contract No

Client Ref Contract Type

Client

Site Address
Radison Blue Hotel
20
London Road
Seapoint
Cape Town
8002

Acknowledgement Ref

Elevator Notes

Order Date By Details

Order No

Price

Engineer

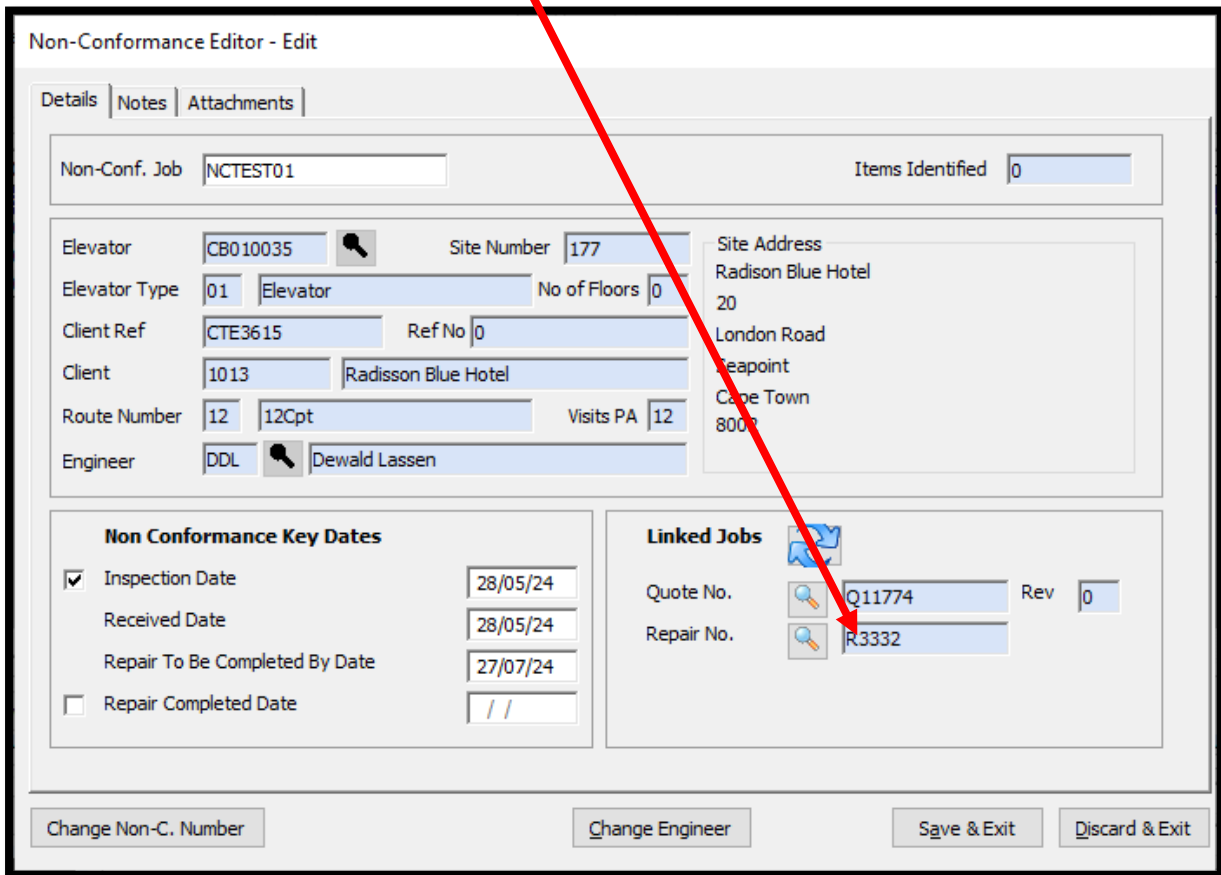
Issue Date

Comprehensive

Closed For Materials By At

- The Order No. is added as the non conformance number and the Repair job can be processed as normal from the Repairs module. As normal, if a Quote exists the Repair can be created 'From Quote'

- The Non Conformance is updated with the Repair No. when the Non Conformance window is reloaded or the 'Linked jobs' button is clicked.



Non-Conformance Editor - Edit

Details | Notes | Attachments

Non-Conf. Job: NCTEST01 Items Identified: 0

Elevator: CB010035 Site Number: 177 Site Address: Radisson Blue Hotel
 Elevator Type: 01 Elevator No of Floors: 0 20
 Client Ref: CTE3615 Ref No: 0 London Road
 Client: 1013 Radisson Blue Hotel Seapoint
 Route Number: 12 12Cpt Visits PA: 12 Cape Town
 Engineer: DDL Dewald Lassen 8007

Non Conformance Key Dates

Inspection Date: 28/05/24
 Received Date: 28/05/24
 Repair To Be Completed By Date: 27/07/24
 Repair Completed Date: //

Linked Jobs

Quote No.: Q11774 Rev: 0
 Repair No.: R3332

Change Non-C. Number Change Engineer Save & Exit Discard & Exit

As noted previously, the Repair Completed Date can be entered manually (where a Repair is not raised) or will be updated automatically from the associated Repair on completion.

7. Reports

A number of reports are available from the Non Conformance Manager dropdown;

- Non-Conformance History
- Non-Conformance with No Complete Date
- Non-Conformance with No Quote
- Non-Conformance with No Repair

Select the appropriate Filter, as below

Client Criteria

From
To

Date

Client Code


Report Example

Elevator Service Manager Report

1 / 1 75%

Preview

- [-] NCTEST01
- [-] TEST01
- [-] TEST02
- [-] TEST03
- [-] TEST04



Non Conformances

Non-Conformance History

From Date 01/11/23 To 28/05/24

Printed: 05/28/2024

Non-Conf. No	Type	Lift No.	Inspection Date	Received Date	Completed By Date	Repair Completed Date	Quote Number	Repair Number
NCTEST01	PVT	CB010035	28/05/2024	28/05/2024	27/07/2024		Q11774	R3331
TEST01	PVT	CB010035	13/05/2024	13/05/2024	12/07/2024		Q11772	R3329
TEST02	PVT	CB010036	17/05/2024	17/05/2024	16/07/2024		Q11773	
TEST03	PVT	CB010036	23/05/2024	23/05/2024	22/07/2024			
TEST04	PVT	CB010038	23/05/2024	23/05/2024	22/07/2024	23/05/2024		

- End -