

Inspections Setup

User Guide

Inspection Example

This is an example of an inspection sheet that has been created and filled in on a job. When setting up the inspection template in Protean, refer back to this sheet to understand what impact it will have on the final document.

1. Category

These are the headers of each section.

2. Attributes

These are the items for the engineers to check, or the questions for them to answer.

3. Codes

These are the answers that the engineers will give to the questions.

4. Template

This is the overall template name.



PROTEAN SOFTWARE LTD
 1130-4- Elliott Court
 Herald Avenue
 Coventry Business Park
 Coventry
 CV5 6UB

Tel: 024 7671 0300
 Fax: 024 7671 0333
 E-Mail: enquiries@proteansoftware.co.uk
 Web Site: www.proteansoftware.co.uk

FAIL

4

Annual inspection

| | | | | |
|-----------------------|--------------------|--------------------|------------|--|
| Equip No: | 23 | Inspect No: | 542 | Site: ABC Second Depot Grove Lane Smethwick Birmingham B66 2SL |
| Make/Model: | Aquarius / TH 6000 | Job No: | 17480 | |
| Serial No: | 83113 | Contact: | Fred Jones | |
| Cust Equip No: | | Inspected: | 29/01/2016 | |
| Meter: | | Printed: | 29/01/2016 | |

Page: 1 of 1

| Items to Inspect | Result | Comments |
|------------------------|--------------------|---|
| Car | | |
| Door Gear/Motor | Serviceable | |
| Door Shoes/V.P. | Serviceable | |
| Enclosure/Sling | Serviceable | |
| Locks/Mech/Elec | Requires Attention | Lock barrel stiff - replace within 6 months |
| Mech Strn/Switches | Serviceable | |
| Overload Device | Serviceable | |
| S'Gear/Switch | Serviceable | |
| Machine Room | | |
| Bearings | Serviceable | |
| Controller | Serviceable | |
| Gear Oil Level % | Reading | 95 |
| Gov/S.R.Pulleys | Serviceable | |
| H.W. Indicator/Tools | Serviceable | |
| Pump Oil Level % | Reading | 86 |
| MCB/Ellison | Serviceable | |
| Pipes/Joints/Seals | Serviceable | |
| Selector | Serviceable | |
| V/Sheaves/Divert | Serviceable | |
| Safety Gear | | |
| Car Overload | Pass | |
| Gear | Pass | |
| Governor | Pass | |
| Landing/Car Door Locks | Pass | |
| Ropes/Chains Replaced | Pass | |

| Items to Inspect | Result | Comments |
|--|--------------------|-----------------------------------|
| Safety Gear | | |
| Safety Gear | Pass | |
| Well | | |
| Buffer/Switches | Serviceable | |
| Cwt Shoes | Serviceable | |
| Guides/Brk ts /Cwts ling | Serviceable | |
| Hydro Pipes/Seals | Serviceable | |
| Ram(s) | Serviceable | |
| Safety Screens | Serviceable | |
| Tension Weight/Switch | Serviceable | |
| Well Lighting | Should be Replaced | Bulb requires replacement in well |
| General Comments | | |
| Generally the equipment is in good working order and is safe for operation providing the recommended works are carried out | | |
| Recommendations | | |
| Replace bulb in well lighting immediately and replace lock barrel within 6 months. Recommend a further service in 12 months. | | |

3

Inspections Setup

User Guide

Inspection Codes

When creating an inspection template, you should always start by setting up the answers that an engineer might give to the various questions or checks on the templates. In Protean, they are referred to as **inspection codes**. Examples of inspection codes are **Pass, Fail, Yes, No, Safe, Unsafe, N/A**.

To setup **inspection codes**, go to [System > Inspection > Codes](#).

1. In the *Description* box, type in the answer that the engineer should give.
2. In the *Code* box, type in an abbreviation of the code.
3. In the *Pass* column, you should decide whether the answer given should cause the entire inspection to fail (see the example in the top-right of page 1). Place a tick in the box if the answer is considered a pass, or leave it blank if it is considered a fail.
4. In the *Notes Required* column, you can force the engineer to add additional notes if they use this answer.
5. If you have ticked the Notes Required box, in the *Notes Type* column, decide whether the note should be numeric or text.

| Description | Code | Pass | Notes Required | Notes Type |
|----------------------|------|-------------------------------------|-------------------------------------|------------|
| Fail | F | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Text |
| Not Applicable | NA | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Text |
| Pass | P | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Text |
| Reading | RDG | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Numeric |
| Requires Attention | RA | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Text |
| Serviceable | S | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Text |
| Should be Replaced | SBR | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Text |
| Worn but Serviceable | WBS | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Text |
| * | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Text |

You should use this screen to setup the answers that could be used across any of your inspection templates.

Later on, you will be able to choose which answers are allowed for each question, and which questions are asked on each inspection template.

Inspection Types

In order to be able to apply which answers are allowed for each question, you need to group them. For example, you would typically see **Pass** and **Fail** grouped together, or **Yes** and **No** in another group. In Protean, these groups are called **inspection types**.

To setup **inspection types** go to [System > Inspection > Types](#).

1. In the *Type* box, type in the name you wish to give the group of codes. For example, **Pass/Fail** or **Service Items**.
2. Select a code from the list on the right-hand side, and click the left arrow to use it within that group. Repeat with any other codes that are needed in the group you are creating.
3. In the *Default Code* dropdown list, choose whichever code you would consider to be the default response to a question.
4. If you wish to now create a new group, simply type over the existing group name in the *Type* box

Type: **Pass / Fail**

Allowed Inspection Codes: Fail (F), Pass (P)

Available Inspection Codes: Not Applicable (NA), Reading (RDG), Requires Attention (RA), Serviceable (S), Should be Replaced (SBR), Worn but Serviceable (WBS)

Default Code: **Pass**

Buttons: Create Inspection Codes, Close

Inspections Setup

User Guide

Inspection Attributes

It is now time to create the questions that the engineer will be asked on the inspection sheet, the categories that they will appear in, and the answers that the engineers are allowed to give for each question. Within Protean, we refer to the questions as **inspection attributes**.

To setup **inspection attributes**, go to *System > Inspection > Attributes*.

Note that you should fill this list with every question that is needed for **all** inspection templates that need to be created. You will learn how to then create the templates and choose which questions are asked in the next section.

1. In the *Category* column, type in the name of the category each question should appear in on the inspection sheet. Check page 1 to remind yourself how this appears on the inspection sheet. Once a category has been created in this screen, you can simply choose it from the dropdown list each time you wish to use it.
2. In the *Attribute* column, type in the question that the engineer needs to answer, or the check that the engineer needs to make.
3. In the *Type* column, choose the group of answers that an engineer is allowed to use when answering this question. These are the inspection types that you setup in the previous section.

| Category | Attribute | Type |
|--------------|------------------------|-----------------|
| Machine Room | Pipes/Joints/Seals | Service |
| Machine Room | Pump Oil Level % | Numeric Reading |
| Machine Room | Selector | Service |
| Machine Room | V/Sheaves/Divert | Service |
| Ropes | Comp Rope/Chain/Anchor | Service |
| Ropes | Gov/Safety Rope/Anchor | Service |
| Ropes | Sus Rope/Chain/Anchor | Service |
| Safety Gear | Car Overload | Pass / Fail |
| Safety Gear | Gear | Pass / Fail |
| Safety Gear | Governor | Pass / Fail |
| Safety Gear | Landing/Car Door Locks | Pass / Fail |
| Safety Gear | Ropes/Chains Replaced | Pass / Fail |
| Safety Gear | Safety Gear | Pass / Fail |
| Well | Buffer/Switches | Service |
| Well | Cwt Shoes | Service |
| Well | Dir/Switches/Limits | Service |
| Well | Guides/Birks/Cwtsling | Service |
| Well | Hydro Pipes/Seals | Service |
| Well | O'Travel Limits/Maint' | Service |
| Well | Pit Stop Switch | Service |
| Well | Ram(s) | Service |
| Well | Safety Screens | Service |
| Well | Tension Weight/Switch | Service |
| Well | Well Lighting | Service |
| * | | |

Inspections Setup

User Guide

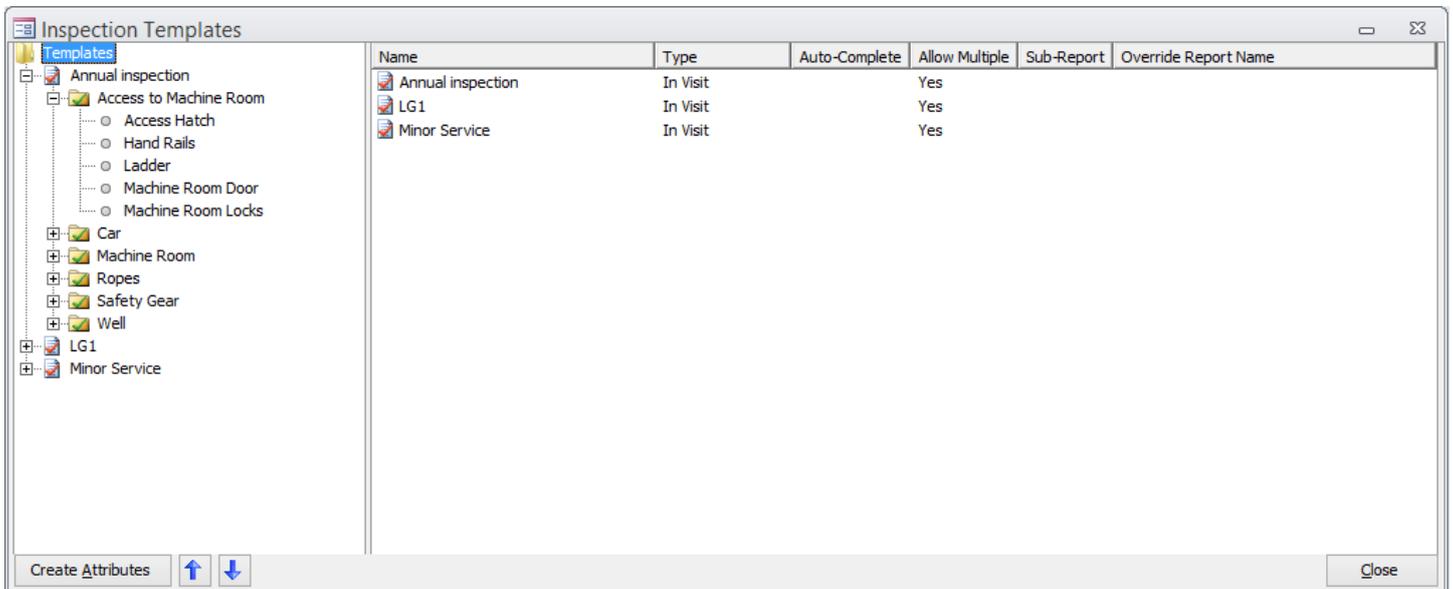
Inspection Templates

Creating the template

Now that you have setup all of the categories, questions and answers that will appear on your inspection sheets, it is time to pull together all of this information to create your **inspection templates**.

To setup **inspection templates**, go to *System > Inspection > Templates*.

1. In the large white space on the right-hand side of the screen, right click and choose *New*.
2. Right click on the *New Template* and choose *Rename*. Tap the enter key on your keyboard.
3. Left click on the new template name, and you should see the list of inspection categories that were created in the previous step. Click on the first category that you would like to appear on your inspection template.
4. In the order that you wish for them to appear on the inspection sheet, click on the questions that should be asked. You will see that this places a tick next to each question, and on the left-hand side of the screen you will see the inspection template taking shape.
5. Once you have applied all relevant questions from this category, click on the name of the inspection template at the left-hand side. This should show you again all of the categories so that you can click on the next category to be used in this inspection sheet.
6. Repeat steps 4 and 5 until you have applied all of the relevant attributes to the inspection template. On the left-hand side, you can click the yellow *Templates* folder icon to go back to the beginning. If you have any more templates to create, start again from step 1.



Throughout the process, it is possible to move items up and down if they have been selected in the wrong order. You can move **categories** or **attributes** up and down, by selecting them in the list in the pane on the left-hand side, and by using the up and down arrows at the bottom of the screen.

Inspections Setup

User Guide

Customising the Template

Once you have created your templates, there are a few ways to customise them further. These options can be accessed by right-clicking on any of the inspection templates in the right-hand pane.

1. **Type...** – It is possible to decide at which point an engineer is prompted to fill out each inspection sheet
 - a. **Pre Visit** will appear when the engineer arrives on site. They cannot continue with the rest of the job until the inspection has been completed. This is useful for risk assessment inspections.
 - b. **In Visit** will appear when the engineer chooses to do that inspection sheet. This is the most common type of inspection, and is generally used for equipment servicing inspections.
 - c. **Post Visit** will appear when the engineer has completed work on the visit, and is useful to prompt the engineer to complete some checks at the end of a job.
 - d. **Feedback** will appear when the customer signs off the job, and is useful to get the customer to complete a satisfaction survey.
2. **Auto Complete...** – It is possible for inspection sheets to be sent to the engineer already filled in, so they only have to change answers that differ from the default response. This is designed to save the engineer time when filling in the inspection, but can mean that the engineer doesn't have to read through every question asked.
 - a. **Do not auto-complete** is the default, and means that an engineer is prompted to answer every question on this inspection sheet.
 - b. **Use Inspection Code Defaults** means that the default entry within the inspection types screen will be automatically applied.
 - c. **From Previous Inspection** causes the answers to pull through from the previous time that the inspection was completed for the same piece of equipment. This allows the engineer to monitor any changes in the condition of the equipment since the last service.
3. **Allow Multiple** – If this is ticked, then it is possible for more than one of the same sheet to be applied for a piece of equipment during a service visit.

You should not change the **Sub-Report** or **Select Override Report** options in this screen – this is used by Protean Software if bespoke inspection sheets are created for you.

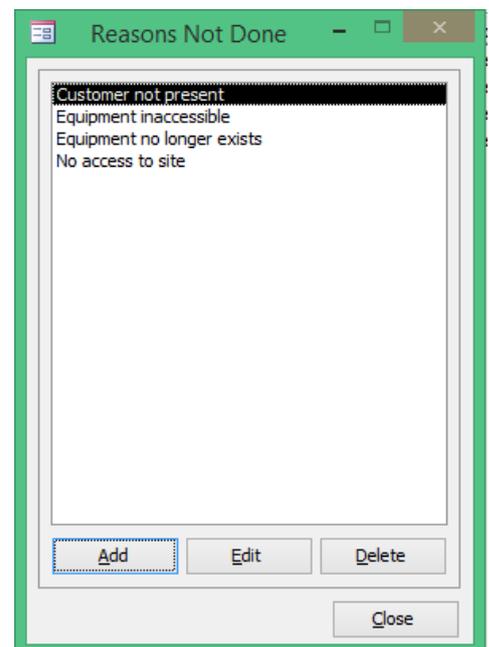
Reasons Not Done

If an engineer cannot complete an inspection sheet whilst on site, they have to choose a reason why it could not be done. These reasons that can be used by the engineer need to be defined by you.

To setup **reasons not done**, go to **System > Inspection > Reasons Not Done**.

1. Use the **Add** button to create a new reason.
2. Type in the reason and choose **OK**.

Note that it is possible to also edit or delete reasons if they have not been setup correctly.



Inspections Setup

User Guide

Automatically Applying Templates to Jobs

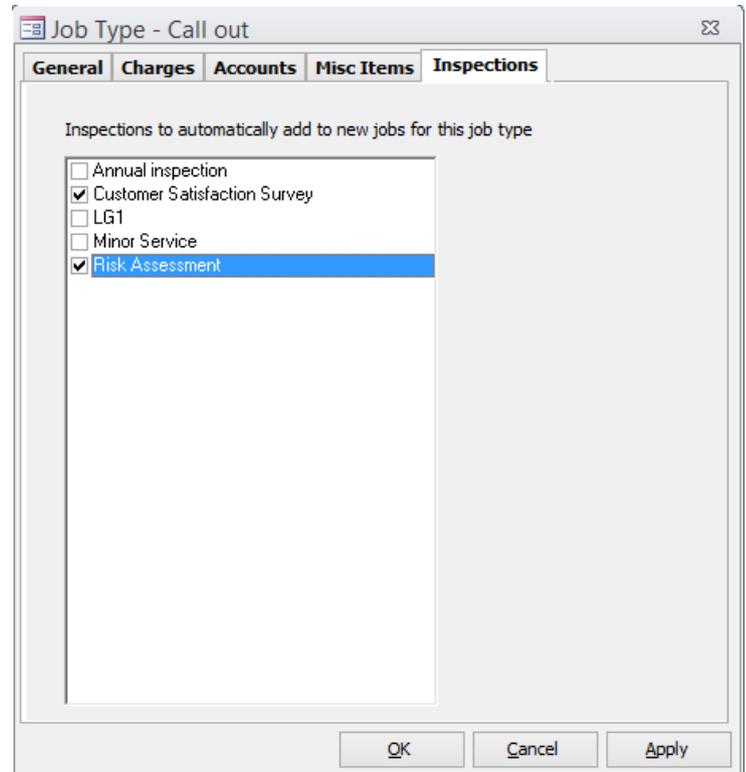
Now that your inspection templates have been created, it is possible to have them automatically applied to jobs. Unless you complete one of these steps, either the office staff or engineers would need to manually add them onto jobs as required.

Add to Jobs

For certain types of job, you may wish to add an inspection sheet to the job itself. This typically isn't suitable for equipment-level inspections such as services, as you may want to apply more than one of these sheets to a job (if you have multiple equipment records to look at), so instead should be reserved for site-level risk assessments or customer satisfaction surveys.

To apply inspections automatically to certain types of job, go to [System > Job Types](#).

1. In the [General](#) tab, choose the relevant job type from the [Name](#) dropdown list.
2. In the [Inspection](#) tab, tick the inspection templates that should be completed for this job type, and click [Apply](#).
3. If you wish to apply inspection templates to other job types, go back to step 1. Otherwise click [OK](#).

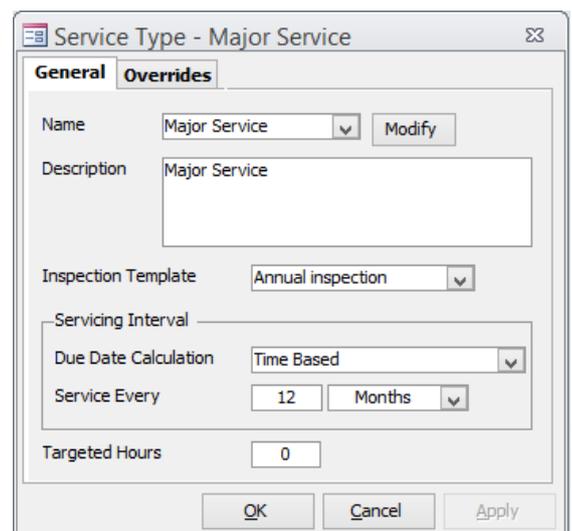


Add to Service Types

For equipment service or inspection style templates, you may wish to apply these automatically to every piece of equipment that is serviced using a certain service type.

To apply equipment templates to service types, go to [System > Maintenance > Service Types](#).

1. Choose the relevant service type from the Name dropdown list.
2. In the [Inspection Template](#) dropdown list, apply the inspection template that applies to that service type and click [Apply](#).
3. If you wish to apply inspection templates to other service types, go back to step 1. Otherwise click [OK](#).



Inspections Setup

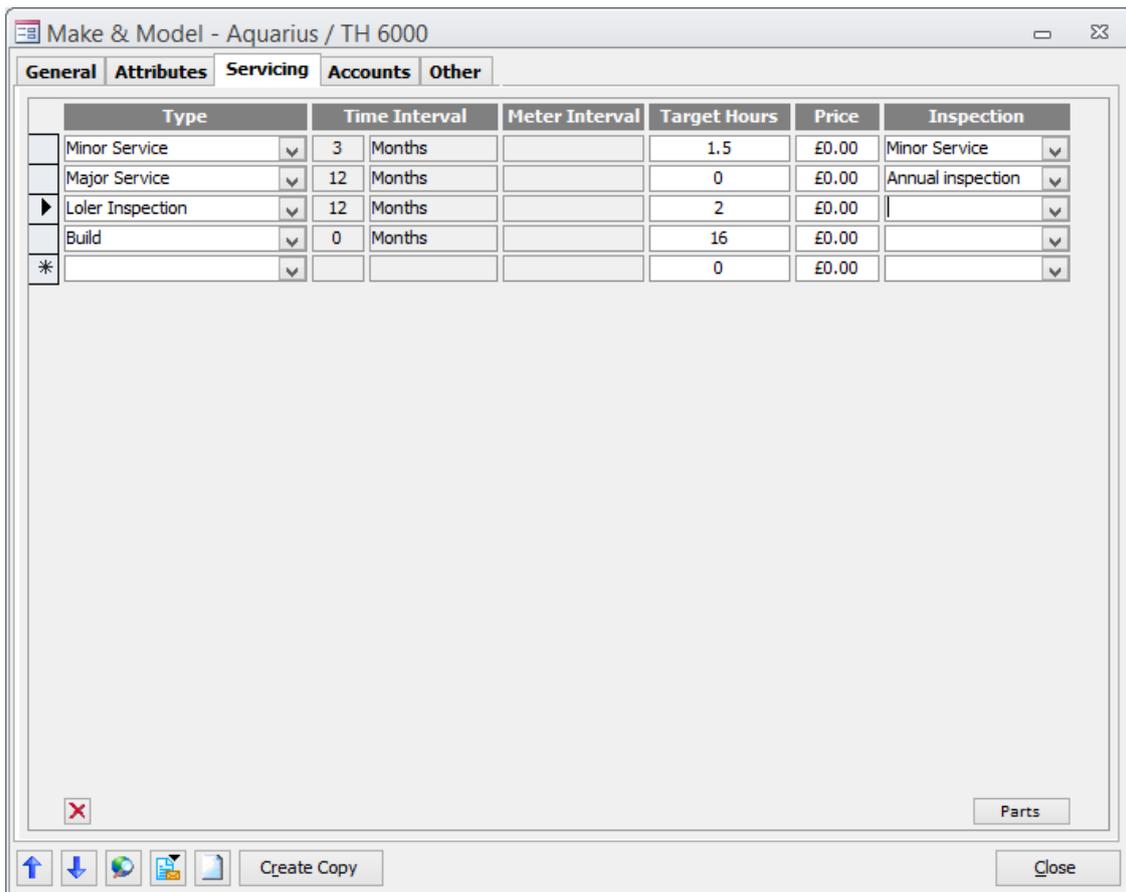
User Guide

Add to Make/Model Service Types

To take the previous section one step further, you may wish for certain makes and models of equipment to be given their own service templates. This can be achieved within Protean by adding the templates at make/model level.

To add inspection templates to make/model service types, go to [System > View Makes & Models](#) and choose the relevant make/model from the list.

1. In the [Servicing tab](#), against the relevant [Service Type](#), choose the required inspection template using the [Inspection](#) dropdown list.
2. Click the [Close](#) button to return to the list of makes and models. If you wish to apply templates to another make/model, choose it from the list and return to step 1.



You have now completed all of the setup required to use makes/models within Protean. Make sure your engineers do a [Sync All](#) in their Protean mobile app so that these inspection templates can be used.