UPVATE REPORTS

These reports are available under the reports section of UpVate Controller. In most cases, the data can be exported as a spreadsheet. Most of the data reported is a result of what has been entered in Controller, rather than DOB data. The only reports that are based on DOB data are: Rejections Not Yet Entered, Missing Inspections, Mismatched Results and DOB Data Report. Each report includes records for all active buildings. Where devices are reported, all active devices are included. Each device must have a client assigned. If multiple clients exist, all records for each client are included.

SCHEDULING

UPCOMING ECB HEARING AND CURE DATES

This report contains all open ECB violations both local and from the DOB whose hearing dates or cure dates are between today and 90 days from now.

UPCOMING SCHEDULED TESTS BY MECHANIC

This report allows the user to select mechanic and date range from the day the report is being run to a future date. The report displays all upcoming tests within that date range for the selected mechanic.

CAT5/CAT1 TESTS DUE

This report allows the user to select type of test Cat 5 or Cat 1. Results are devices that do not have an inspection date or test results entered for the current year.

NON-DOB TESTS DUE

This is a report of all tests that are due in the selected month and year and do not have an inspection date. Buildings must already have inspection frequency and preferred months to test specified.

SUBMISSIONS REPORTS

DOB SUBMISSIONS NOT CLEARED

This report contains tests, PVTs, ECBs and VCATs which have been filed with the DOB but have not yet been cleared by the DOB.

PAPERWORK TO BE SUBMITTED

This report is designed for the user to identify which filings they need to work on next. The user can select Tests, PVT or ECB. The results returned are items that have a work completion date but no AOC filed date.

DEFICIENCIES EXCLUDED FROM PAPERWORK

This report lists all deficiencies that users have previously checked off to exclude from ELV29 paperwork.

AOCS/AEU2S SENT TO CUSTOMER

This report lists all open tests, PVTs or ECBs having a date entered in the AOC Sent to Customer field or AEU2 Sent to Customer field.

TESTS WITHOUT AOC FILED DATES

This report lists all open tests that do not have an AOC filed date.

REJECTIONS REPORTS

REJECTIONS REPORT

This report displays all tests having rejection data entered in Controller. The user can specify Cat 1 AOC, Cat 5 ELV3 or Cat 1 ELV3 rejections, paid status, cleared or uncleared, and active or all devices.

REJECTIONS NOT YET ENTERED

This report displays rejections posted on DOB which have not been entered into Controller.

VIOLATIONS

VIOLATIONS REQUEST LIST

If a user clicks the "Request Violation" button within a PVT or VCAT, it is added to the list displayed on this screen. This list can be used by the expeditor to request copies of these violations. Once scanned paperwork is uploaded, the violation will fall off of this list.

OPEN PVT REPORT

This report displays all open PVTs for buildings and devices that are active.

OPEN ECB REPORT

This report displays all open ECBs for buildings and devices that are active.

OPEN LL10/VCAT REPORT

This report displays all open LL10, CAT1 and VCAT5 violations for buildings and devices that are active.

OPEN AEUHAZ1 REPORT

This report displays all open AEUHAZ1 violations for buildings and devices that are active.

PERMITS

PERMITS OVERVIEW REPORT
This report contains details for all active permits.

NEW PERMIT REPORT
This report lists permits that have been added in the last 45 days.

CLOSED PERMIT REPORT
This report lists permits that have been closed in the last 45 days.

EXPIRING PERMIT REPORT
This report lists permits that are expiring in the next 90 days.

RESULTS

UPCOMING AND OVERDUE AOCS
This report contains all tests where an AOC filing is due or overdue. The report lists all open tests where the disposition is unsatisfactory and no AOC filed date has been entered. It contains columns for Work Completion Deadline date, Deadline Date, Days Overdue and Penalty Estimate based on the number of days allowed before fines are imposed. If the user does not need all of the columns, they can export this as a condensed report or click on "Manage Fields on Reports" to select the necessary columns. Tests having AOC filed dates or cleared status can also be included by checking off the "Include Cleared and AOC Filed Dates" checkbox.

CUSTOM REPORT
This report provides comprehensive detail of test, violation and rejection data entered in UpVate Controller, as well as estimated penalty amounts based on data that has been entered. The user is required to narrow their search by using the following criteria: contract ID, client name, sub-branch, physical address, route number or year. The user can choose results for any or all of the following: Tests, PVTs, ECBs and VCATs. Status can be open, closed or both. Checking off the "Satisfactory" box gives satisfactory only results. Deficiency details and notes can either be included or omitted from the report. This report can be used in conjunction with the DOB data report to get a comprehensive understanding of what is currently happening for a given building or client.

TEST OVERVIEW REPORT

This report gives an overview of each device for the current year to help managers quickly see the data needed to analyze what is outstanding and communicate with clients. The report indicates if inspection results have been entered and includes rejection information, ELV3 stamped date, work completion date and AOC filed date.

SCHEDULED TESTS AWAITING RESULTS

This report contains all tests that require results. These are tests having a scheduled (start) date in the past with no results entered, as well as tests having a scheduled date in the past and there is an unsatisfactory disposition entered but no deficiencies.

COMPLETED TESTS WITH NO ELV3 STAMP DATE

This report contains all tests that do not have a stamped ELV3 or EBI ELV3 uploaded and therefore are missing an ELV3 stamped date. This report can be used to determine if paperwork needs to be provided or resubmitted by the third party.

EBI RECONCILIATION

This function allows users to upload a stamped EBI form that has been generated in the system for AOC filing. The EBI that was originally generated is visible in this screen as well. The user can enter an AOC filed date and attach the EBI to the corresponding tests and violations in a single step. Then each test or PVT listed on that EBI contains the EBI received from DOB. Once the reconciliation is done, the record of that EBI form is removed from this list.

RECONCILIATION REPORT

This report gives a summary of all tests for the selected year, broken down by test type, status and proposal status.

WAITING FOR SURVEY REPORT

This report includes deficiencies marked as "Waiting for Survey" and can be run for all or only those with survey dates which have not passed.

COMPLETED WORK REPORT

This report includes all deficiencies marked as work completed.

DEFICIENCY ASSIGNMENTS

MECHANIC'S OPEN DEFICIENCIES (MECHANIC'S REPORT)

This report is designed for mechanics to close open deficiency items at a building or route. The user selects a building or route. The report displays all open items for that building or route. Open items are all deficiencies for ECB, PVT, and Tests that are not cleared and do not show a work completion date or an AOC filed date. This can also be generated in the main screen of any building in pdf or excel format.

TEST/ECB/PVT DEFICIENCY ASSIGNMENTS

These reports show the assignments for all open deficiencies that are made to building, sales, maintenance, repair or unselected departments.

MISCELLANEOUS

LABOR HOURS BACKLOG REPORT

This report summarizes the hours by deficiency for open deficiencies. The hours come from standards for each deficiency part, condition, remedy combination.

FINE LIABILITY REPORT

This report summarizes potential fines by year, sub-branch and liability.

BUILDINGS WITHOUT CLIENTS ASSOCIATED

This report displays buildings not having a client association.

MISSING DOCUMENTS

This report displays documents having broken links.

DOB SUBMISSIONS LOG

This screen allows users to upload a pdf of submissions made at DOB for any given date as one large scanned file. Each row is the record of what was submitted on that particular date.

ACTIVE/DEACTIVATED UNITS AND BUILDINGS

This report lists all devices and buildings. The user may search for deactivated devices, deactivated buildings, active devices at active buildings or inactive devices at active buildings.

MISSING INSPECTIONS

This report contains inspections that are listed on DOB but not in Controller.

MISMATCHED RESULTS

This report contains inspections whose disposition on DOB does not match the disposition in Controller. Most importantly it shows inspections that are unsatisfactory on DOB but satisfactory in Controller and therefore may either have fines pending or need paperwork/records updated.

NON-DOB BUILDINGS AND DEVICES

This report lists all devices that are managed by the elevator company but do not appear on the DOB and therefore have been added locally.

BUILDING NOTES

This report contains all notes for active buildings.

CLIENT/CONTRACT REPORT

This report contains client details and the addresses of their associated buildings.

BI REPORT

This report helps determine units that may need to be added or dropped in Controller. A user first uploads the BI report (unit list). Devices on this report are then compared to what currently exists in Controller, based on machine numbers. An add/drop report is then generated that details devices which are on the BI report but not in Controller (adds) and devices which are in Controller but not on the BI report (drops).

DOB DATA REPORT

This report lists inspections, open ECB violations, open PVT violations, open LL10 violations and complaints that have been pulled from the DOB.

SCRAPE DATES REPORT

This report lists the most recent date that DOB data was scraped for test history, ECBs, PVTs, VCATs, complaints and permits for all active buildings.