

**OTIS**



**eService**

*your elevator's performance and service history*

# User Guide

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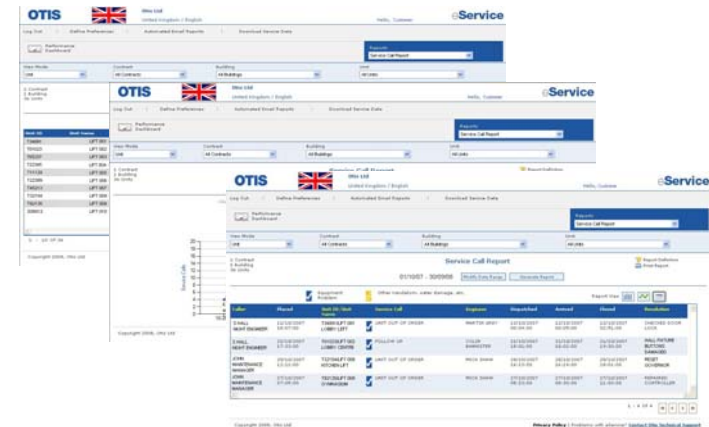
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## Key Features

### Easy-to-use, customisable eService Web site

Designed with building owners and managers in mind, the eService Web site makes getting equipment information both simple and intuitive. After logging in, users immediately see the eService Performance Dashboard - a customisable overview of performance and service data.

From availability reports to service call and maintenance repair details, users can select from a variety of reports using the drop-down reports menu. Within reports, users can adjust the level of detail they wish to see, whether unit, building or contract levels. In addition, they can configure the report date range as needed and view data in bar chart, line graph or table format.

### Convenient access to equipment and service data

While users can access the eService site at any time to review key equipment information, they also have the opportunity to download this data and register for regular e-mail updates.

While logged into the eService site, users can customise service data and quickly download in their preferred format. The eService system also offers users the opportunity to receive automatic e-mail updates. Users simply select the performance and service reports they would like to receive and set the frequency from monthly to annually.

## Overview

### eService performance dashboard

A quick overview of performance and service data, easily customised to meet users' needs

### Customisable reports

Performance, availability, maintenance history reports and more - all available in the user's preferred format

### Download service data

Quickly download critical service information for the date range and in the level of detail needed

### Automatic updates

Select performance and service reports to receive regularly via e-mail

# How to create an eService account

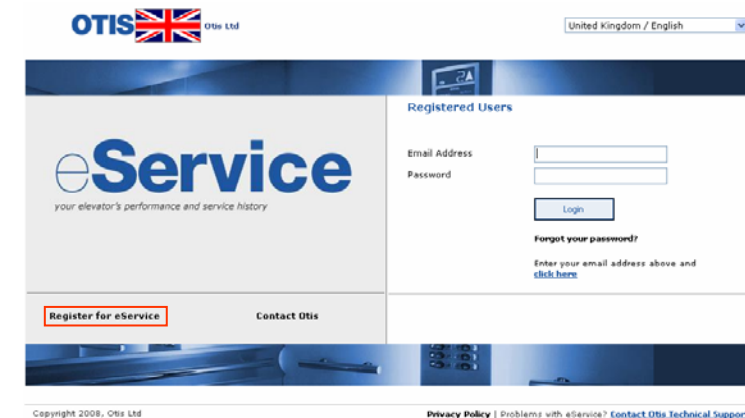
1. To create an eService account please visit [www.otis.com](http://www.otis.com) and select the **United Kingdom/English** or **Ireland/English** site from the drop down box on the left hand side.



3. Click the **Register for eService** hyperlink.



2. Click the **eService** hyperlink in the Building Managers section in the centre of the page.



[Additional Application Access](#) Already registered user and need access to eBusiness application

[Update Profile](#) Already registered user and wants to update the profile

## Welcome to Registration

By registering, users can stay up-to-date with the latest news, information and online planning tools from Otis Elevator Company. To ensure proper access to secured pages on Otis.com, please enter your e-mail address correctly.

4. Complete the registration form as appropriate, remembering to select the correct **Country/Language** and completing fields with an asterisk \*.

Then click **Submit**.

Prefix:	<input type="text" value="Mr"/>	Email Address:*	<input type="text" value="joe.bloggs@email.com"/>
First Name:*	<input type="text" value="Joe"/>	Last Name:*	<input type="text" value="Bloggs"/>
Address 1:*	<input type="text" value="123 Park Lane"/>	Address 3:	<input type="text"/>
Address 2:	<input type="text"/>	County:*	<input type="text" value="London"/>
City:*	<input type="text" value="London"/>	User Language:*	<input type="text" value="English"/>
Postal Code:*	<input type="text" value="L123456"/>	Department:	<input type="text"/>
User Country:*	<input type="text" value="United Kingdom"/>	Phone 2:	<input type="text"/>
Company:*	<input type="text" value="Reports Ltd"/>		
Phone 1:*	<input type="text" value="01234 567891"/>		
Fax:	<input type="text"/>		
Password:*	<input type="password" value="....."/>	Password must be alphanumeric and 8 characters long.	
Confirm Password:*	<input type="password" value="....."/>	Reenter the same password.	
<input type="checkbox"/> Contact me from time to time about the latest on-line product promotions and e*Commerce tools from Otis Elevator			
Primary Interest:*	<input checked="" type="radio"/> Architect	<input type="radio"/> Building Employee	
	<input type="radio"/> Building Managers	<input type="radio"/> Building Owner	
	<input type="radio"/> Building Tenant	<input type="radio"/> Consultant	
	<input type="radio"/> Contractor	<input type="radio"/> Facility Manager	
	<input type="radio"/> General Public	<input type="radio"/> National Account Customer	
	<input type="radio"/> Other	<input type="radio"/> Student	
	<input type="radio"/> Civil Servant		

\* indicates a required field



### Application Selection

Access

Description comes here



#### eService

Control, confidence, knowledge and flexibility Round-the-clock access to maintenance records. A snapshot of your system's performance history. Fast verification that work has been done. Swift, easy on-line placement of service calls and simple tracking of your call's progress. eService is only available for those with an existing service contract with OTIS.

Request Access

Close

5. Select **eService** from the applications available and click **Request Access**.

### eService Registration

**Select Preferences**

Select Country/Language

\* Note - For eService application select appropriate Country/Language.

---

Add more building(s) to your eService account by providing us your contract numbers or building names.

Contract       Building       Note

---

**Add Contracts**

Contract Number	Request to add
<input type="text"/>	<input type="text" value="M71839V"/>

Your request has been submitted successfully. Request will be reviewed and you will be notified by email on approval.

6. After you have registered your details and selected the eService application you will be directed to the screen pictured to the left.

Please enter in here your **Contract Number** given to you by Otis and click **Add**. If you have more than one contract number, continue to add the additional contract numbers.

If you do not know your contract number then you can enter your building name into the below section by selecting the **Building** button or you can click **Note** to leave a message if you are still having issues.

After you have completed adding Contract/Building/Note information click **Submit** to complete your registration.

Please select **Close** and you will be notified by email when your access has been approved.

# Performance Dashboard

After logging in, users immediately see the eService **Performance Dashboard** which is designed to provide a quick overview of performance and service data. Fully customisable, you can adjust the dashboard to best suit your needs.

By default the Performance Dashboard is set at Portfolio View however this can be changed by selecting the different options available in the drop-down menus and if required modifying the date range.

OTIS United Kingdom / English Hello, Customer eService

Log Out | Define Preferences | Automated Email Reports | Download Service Data

Performance Dashboard

View Mode: Portfolio | Contract: All Contracts | Building: All Buildings | Unit: All Units

1 Contract  
1 Building  
36 Units

Performance Dashboard

01/10/07 - 30/09/08 | Modify Date Range | Generate Report

Click here for more details

Contract	Number of Units	Availability%	Customer-Initiated Calls
M71639V	36	99.9	183
<b>Average Per Unit</b>		<b>99.9</b>	<b>5</b>

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OTIS United Kingdom / English Hello, Customer eService

Log Out | Define Preferences | Automated Email Reports | Download Service Data

Performance Dashboard

View Mode: Unit | Contract: All Contracts | Building: All Buildings | Unit: All Units

1 Contract  
1 Building  
36 Units

Performance Dashboard

01/10/07 - 30/09/08 | Modify Date Range | Generate Report

Unit ID	Unit Name	Availability%	Customer-Initiated Calls
T34891	LIFT 001 LOBBY LEFT	99.9	2
T01023	LIFT 002 LOBBY CENTRE	99.8	1
T65237	LIFT 003 LOBBY RIGHT	99.6	6
T22345	LIFT 004 CAR PARK LEVEL B-	100.0	1
T11124	LIFT 005 CAR PARK LEVEL A	99.8	6
T22389	LIFT 006 HOTEL REAR	99.8	3
T45213	LIFT 007 RESTAURANT	100.0	0
T32154	LIFT 009 KITCHEN LIFT	99.0	13
T32135	LIFT 009 GYMNASIUM	100.0	0
S00012	LIFT 010 SERVICE LIFT	96.2	16
<b>Average Per Unit</b>		<b>99.4</b>	<b>5</b>

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After selecting your preferences with regards to view and date range the **Generate Report** button will slowly flash blue. Click this button to activate the required view.

The above image shows the dashboard as **Portfolio View** containing one contract. The image to the left shows the same contract but under **Unit View**.

## eService Reports Types

The new eService system offers the following reports, designed to meet users' needs for equipment performance and service history information. These can be selected from the drop-down menu in the top right hand corner of the screen and offer the following:

### Availability Report

Availability is the percentage of time for which each unit in a building is available to transport passengers on a 24 hr/365 day-basis and is calculated as follows:

$$\% \text{ Availability} = (\text{Total Time} - \text{Total of Out-of-Service Intervals}) / \text{Total Time} * 100$$

An Out-of-Service Interval is the period between the initiation of a service call by a customer or REM<sup>®</sup> and the unit being returned to service by an Otis engineer.

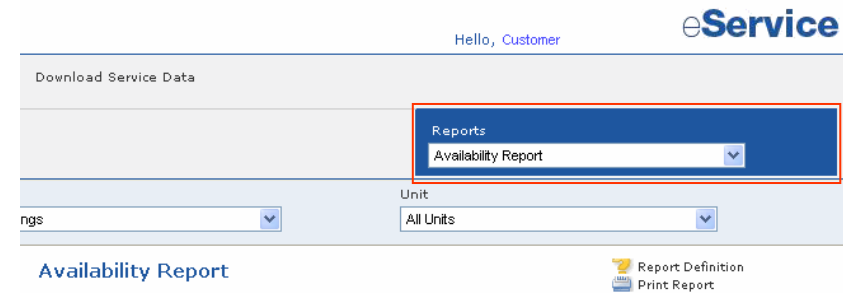
### Mean Time Between Service Calls Report

Mean Time Between Service Calls Report represents, in days, the average per-unit time between customer or REM<sup>®</sup> system generated service requests

### Response Time Report

Represents the time interval between receipt of a non-emergency customer or REM<sup>®</sup> system generated service request and the arrival of an engineer on site.

Note: The time for deferred service requests are included in the calculation (i.e. service request placed at 6:00pm Friday and deferred until 8:00am Monday includes the 62 hours of deferred time).



### Emergency Service Call Report

Represents the number of times during the reporting period that there has been an emergency service request such as a trapped passenger as the final disposition.

If a service request was originally called in as a trapped passenger but Otisline<sup>®</sup> was later notified that the passenger was out but still required a service call, Otisline<sup>®</sup> would change the status to a regular service call and therefore would not appear in this report.

### Service Call Report

A service call is a request from a customer or a request generated by REM<sup>®</sup> service for an unscheduled service visit to a customer building to investigate and/or correct a reported condition. The service call is closed once the work is reported as completed by the Otis engineer.

### Preventative Maintenance & Procedures Report

Represents the time interval between receipt of a non-emergency customer or REM<sup>®</sup> system generated service request and the arrival of an engineer on site.

Note: The time for deferred service requests are included in the calculation (i.e. service request placed at 6:00pm Friday and deferred until 8:00am Monday includes the 62 hours of deferred time).

# eService Reports Views

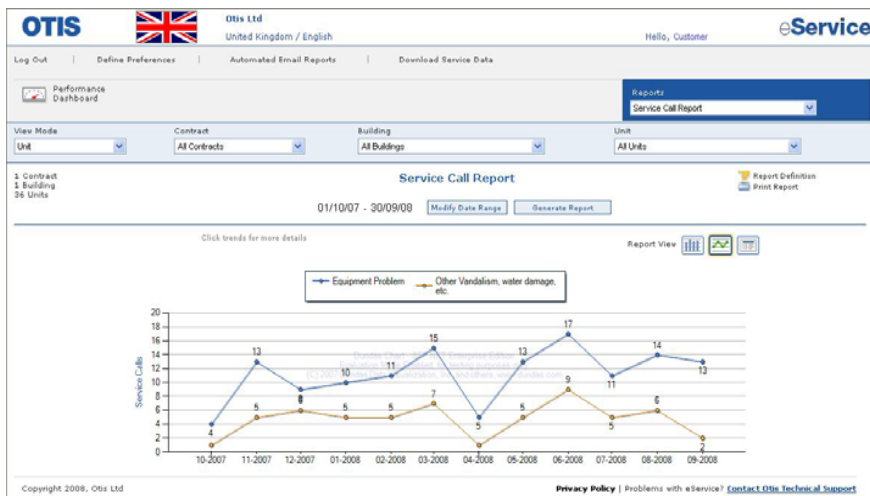
After you have selected the type of eService report you require there are 3 different view types which you can select between

**Bar Chart** view shows the total number of service calls received within the specified date range.

**Line Graph** view shows the total number of service calls received within the specified date range separated into the month the call was raised to show frequency.

**Table Format** view shows the details of the individual service calls within the specified date range.

## Line Graph.



## Bar Chart.



## Table Format.

Caller	Placed	Unit ID / Unit Name	Service Call	Engineer	Dispatched	Arrived	Closed	Resolution
S HALL NIGHT ENGINEER	11/10/2007 18:07:00	T34091 & FT 001 LOBBY LIFT	UNIT OUT OF ORDER	MARTIN GREY	12/10/2007 00:09:00	12/10/2007 02:51:00	12/10/2007	CHECKED DOOR LOCKS
S HALL NIGHT ENGINEER	21/10/2007 17:03:00	T01023 & LFT 002 LOBBY CENTRE	FOLLOW UP	COLIN BARNISTER	21/10/2007 18:02:00	21/10/2007 19:30:00	21/10/2007	HALL FITURE SUITONS DAMAGED
JOHN MAINTENANCE MANAGER	28/10/2007 12:11:00	T32154 & LFT 009 KITCHEN LIFT	UNIT OUT OF ORDER	MICK SHAW	28/10/2007 16:13:00	28/10/2007 18:01:00	28/10/2007	RESET GOVERNOR
JOHN MAINTENANCE MANAGER	27/10/2007 07:05:00	T92135 & LFT 009 GYMNASIUM	UNIT OUT OF ORDER	MICK SHAW	27/10/2007 08:23:00	27/10/2007 11:00:00	27/10/2007	REPAIRED CONTROLLER

# Automated Email Reports

## Scheduled Email Reports

The screenshot displays the 'Automated Email Reports' configuration interface. At the top, there are navigation links for 'Log Out', 'Define Preferences', 'Automated Email Reports', and 'Download Service Data'. A 'Performance Dashboard' link is also visible. The main section is titled 'Automated Email Reports' and contains several sub-sections:

- Activate Automatic Email Reports:** Radio buttons for 'Don't send me any reports' (selected) and 'Send me reports'.
- Schedule Frequency:** A dropdown menu set to 'Monthly'.
- Select Reports:** A list of reports to be selected, including 'Availability Report', 'Service Call Report', 'Mean Time Between Service Call Report', 'Emergency Service Call Report', 'Response Time Report', and 'Preventive Maintenance & Procedure Report'. A 'Select View' section offers 'Bar Chart' (selected), 'Trend Line', and 'Detail' options. A 'Selected' list shows 'Service Call Report (Bar Chart)'. A note below states 'Note: Includes Performance Summary'.
- Report View:** A dropdown menu set to 'Building'.
- Reports should include:** A dropdown menu set to 'Contract'.
- Search and Add:** Input fields for 'Enter Building Id', 'Enter Building Name', 'Enter Unit Id', 'Enter Contract No' (with 'M71839V' entered), and 'Enter Customer Id'. A 'Search And Add >>' button is present. A 'Selected' list shows 'M71839V' and a 'Total records found: 1' message.
- Select Report File Type:** Radio buttons for 'MS Word' (selected), 'PDF', and 'MS Word .DOCX'.
- Save Preferences:** A button at the bottom.

As a default, the new eService system automatically sends each customer a Performance Dashboard Report via e-mail on a monthly basis. Users can add additional reports, change the frequency of reports or unsubscribe to this service by logging into the eService..

To change preferences for the e-mailed reports, the user needs to follow the following steps:

1. Login to eService.
2. Click on **Automated Email Reports** on the top menu.
3. Under **Scheduled Email Reports**, select the following details:

- **Select Reports** - which are required to be sent on selected frequency
  - **Report View** - report should show building or unit view
  - **Report should include** - Contract / Building / Unit and also select appropriate information. Make sure you select the correct view to the type of search you are going to make. For example select Contract from the drop-down menu if you are going to search for a Contract No.
  - **Select Report File Type** - preferred file type
4. Save the changes by clicking on **Save Preferences** button

# Automated Email Reports

## Service Data

**OTIS** **Otis Ltd** United Kingdom / English Hello, Customer **eService**

Log Out | Define Preferences | **Automated Email Reports** | Download Service Data

Performance Dashboard | Reports: Select Report

### Service Data

**Scheduled Email Reports** | **Service Data**

**Attach Service Data to Email**  
 Attach service data

**Schedule Frequency**  
Monthly

**Service Data Reporting Period**  
Previous 12 Months

**Reports should include**  
Contract

Enter Building Id:   
Enter Building Name:   
Enter Unit Id:   
Enter Contract No: M71839V  
Enter Customer Id:

Selected: M71839V

Total records found: 1

Search And Add >> | << Remove

**Select File Type**  
 Tab Delimited Text File (.txt)  
 Excel File

Save Preferences

If users prefer to use their own reporting format, the service data for their sites sent to them periodically. This data can be used to integrate into their own reports or databases.

To set the frequency for service data to be e-mailed, the user needs to follow the following steps:

1. Login to eService.

2. Click on **Automated Email Reports** on the top menu.

3. Under **Service Data**, select the following details:

- **Attach Service Data to Email** - Make sure the box is checked.
- **Schedule Frequency** - Select your frequency.
- **Service Data Reporting Period** - Select the date range which you require.
- **Reports should include** - Contract / Building / Unit and also select appropriate information. Again make sure you select the correct view to the type of search you are going to make.
- **Select File Type** - preferred file type.

4. Save the changes by clicking on **Save Preferences** button.

## Download Service Data

OTIS Otis Ltd  
United Kingdom / English Hello, Customer eService

Log Out | Define Preferences | Automated Email Reports | Download Service Data

Performance Dashboard Reports  
Select Report

### Download Service Data

Set Date Range  
Start Date: 28/10/07 End Date: 28/10/08

Reports should include  
Contract

To be Selected Selected  
M71839V

Add >> << Remove

Select File Type  Text File - Tab Delimited  Excel File

Download

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Users also have the ability to download service data on an ad hoc basis.

To download service data, the user needs to follow the following steps:

1. Login to eService.
2. Click on **Download Service Data** on the top menu.
3. Complete the following details:

- **Set Date Range.**

- **Reports should include** - Contract / Building / Unit and also select appropriate information. Again make sure you select the correct view to the type of search you are going to make.

- **Select File Type** - preferred file type.

4. Click the **Download** button.

## Define Preferences

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Log Out | Define Preferences | Automated Email Reports | Download Service Data

Performance Dashboard Reports  
Select Report

### Define Preferences

Display Preferences

Select Default View Mode Portfolio

Update

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By default when the user is viewing the Performance Dashboard or any other report, Portfolio View is used. This can be changed if the user prefers another view mode.

To define the default View Mode, the user needs to follow the following steps:

1. Login to eService.
2. Click on **Define Preferences** on the top menu.
3. **Select Default View Mode.**
4. Click the **Update** button

# Update Profile

OTIS Otis Ltd United Kingdom / English

## eService

your elevator's performance and service history

**Registered Users**

Email Address:   
Password:

Forgot your password?  
Enter your email address above and [click here](#)

**Register for eService** [Contact Otis](#)

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OTIS

Select Language: United Kingdom/English

[Additional Application Access](#) Already registered user and need access to ebusiness application

**Update Profile** Already registered user and wants to update the profile

### Welcome to Registration

By registering, users can stay up-to-date with the latest news, information and online planning tools from Otis Elevator Company. To ensure proper access to secured pages on Otis.com, please enter your e-mail address correctly.

Prefix:	<input type="text"/>	Email Address:*	<input type="text"/>
First Name:*	<input type="text"/>	Last Name:*	<input type="text"/>
Address 1:*	<input type="text"/>		
Address 2:	<input type="text"/>	Address 3:	<input type="text"/>
City:*	<input type="text"/>	County:*	<input type="text"/>

OTIS

### User Verification

Email Address:*	<input type="text"/>
Password:*	<input type="password"/>
<a href="#">Forget Password?</a>	<input type="button" value="Login"/>

Users are able to modify the details which was initially used during registration. To complete this:

1. Click **Register to eService** on the welcome page.

2. Click **Update Profile** on the registration page.

3. Enter your **Email Address** and your **Password** and click the **Login** button. You will then be directed back to the registration page which will be filled out with your current details. Modify these as required then select **Submit** to save the information.