ELEVATOR SERVICES · COMPLIANCE OPERATIONS

Compliance inspection tracking

Automatically tracks elevator compliance inspections by monitoring due dates, scheduling inspections, and generating regulatory reports. Reduces compliance violations and streamlines certification processes for elevator service companies.

01 WORKFLOW TRIGGER

Compliance inspection becomes due within 30 days or regulatory deadline approaches

BLUEPRINT OVERVIEW

What this workflow accomplishes

This workflow links MAXIMO asset records, Corrigo work orders, FieldAware dispatch, ServiceMax mobile inspection forms, and building management systems into one compliance inspection track. Automation watches due dates, pulls jurisdictional requirements, books certified inspectors, and produces certificates and violation notices. The compliance manager and the licensed inspector retain authority over credential validation, pass/fail calls, and anything filed with the authority having jurisdiction.

01

OUTPUTS

Signed inspection certificates, Violation notices per unit, Next inspection due dates, AHJ submission confirmations

02

SUCCESS MEASURES

Inspections completed on time, Violations per hundred units, Days to book inspector, Report accuracy on submission

03

CORE SYSTEMS

MAXIMO, Building Management Systems, Corrigo, FieldAware, ServiceMax

HOW TO USE THIS BLUEPRINT

Service managers: confirm the jurisdiction rule set and inspection interval loaded per unit before switching the trigger on.

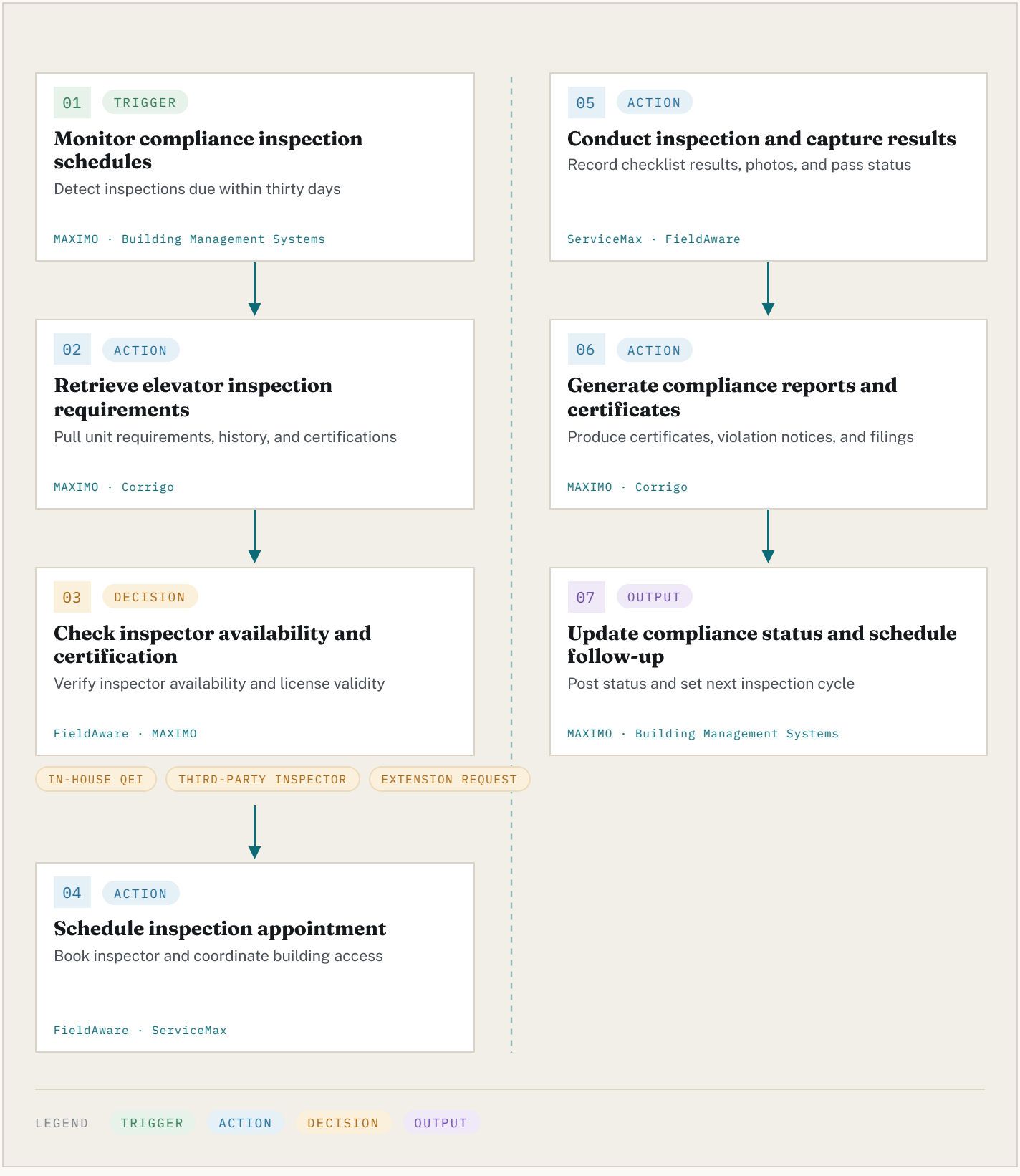
Compliance managers: review the credential check at stage 3 and sign off on every report leaving the system for the authority having jurisdiction.

Implementation teams: map MAXIMO asset IDs to Corrigo locations and ServiceMax forms so results post to the right car and hoistway.

THE WORKFLOW

End-to-end stage map

Seven stages carry a unit from a 30-day due-date alert through certificate issuance and the next cycle. The single decision point at stage 3 governs whether an in-house certified inspector takes the job or the work routes to a third-party QEI or a deadline extension request.



IMPLEMENTATION DETAIL

Stage-by-stage breakdown

Each stage states the operational intent, the human control point, and the systems likely to take part. System names are examples, not a required architecture.

01 TRIGGER

Monitor compliance inspection schedules

System automatically detects when elevator inspections are approaching due dates based on regulatory requirements and maintenance calendars. Triggers workflow 30 days before inspection deadline.

CONTROL POINT

Compliance manager reviews the weekly due-date exception list and can suppress or advance a unit alert when a car is out of service.

SYSTEMS MAXIMO Building Management Systems

02 ACTION

Retrieve elevator inspection requirements

Pulls specific compliance requirements, previous inspection history, and required certifications for the elevator unit. Gathers all necessary documentation and regulatory standards.

CONTROL POINT

Compliance coordinator verifies the pulled code edition and category test type match the current AHJ requirement for that unit.

SYSTEMS MAXIMO Corrigo

03 DECISION

Check inspector availability and certification

Evaluates whether certified inspectors are available within the required timeframe and validates their credentials match regulatory requirements. Routes to appropriate scheduling path based on availability.

CONTROL POINT

Compliance manager approves any assignment where the QEI license or witness qualification is within 60 days of expiry.

SYSTEMS FieldAware MAXIMO

04 ACTION

Schedule inspection appointment

Automatically books inspection slot with certified inspector and coordinates with building management for access. Sends calendar invites and preparation checklists to all stakeholders.

CONTROL POINT

Building contact confirms machine room access and car shutdown window before the appointment is locked in dispatch.

SYSTEMS FieldAware ServiceMax

COMPLETION AND MEASUREMENT

Closing stages and results

The closing stages hold the certificate of record, the violation trail, and the next due date written back to every system that dispatch and building management read from.

05 ACTION

Conduct inspection and capture results

Inspector completes compliance checklist using mobile app, captures photos/videos of violations, and records pass/fail status for each requirement. Data syncs in real-time to central system.

CONTROL POINT

The licensed inspector on site owns every pass or fail call and signs the mobile record; no automated scoring overrides it.

SYSTEMS ServiceMax FieldAware

06 ACTION

Generate compliance reports and certificates

System automatically creates regulatory compliance reports, violation notices if applicable, and official inspection certificates. Distributes documents to building owners and regulatory bodies.

CONTROL POINT

Compliance manager approves each certificate and violation notice before distribution to the owner and the AHJ.

SYSTEMS MAXIMO Corrigo

07 OUTPUT

Update compliance status and schedule follow-up

Records inspection completion in all systems, updates elevator compliance status, and automatically schedules next inspection cycle. Triggers corrective action workflows for any violations found.

CONTROL POINT

Service manager confirms the next due date and releases any corrective work orders raised from open violations.

SYSTEMS MAXIMO Building Management Systems

DELIVERABLES

- Signed inspection certificates
- Violation notices per unit
- Next inspection due dates
- AHJ submission confirmations

KEY METRICS

- Inspections completed on time
- Violations per hundred units
- Days to book inspector
- Report accuracy on submission

IMPLEMENTATION CHECKS

- QEI license expiry feeds credential check
- AHJ submission portal credentials secured
- Certificate retention meets jurisdiction term
- Violation routing to corrective work orders
- Audit log on every report edit

NEXT STEP

Turn this blueprint into an implementation plan.

Map each stage to your own systems, permissions, and approval routing before selecting tools or building automation.

packfoundry.app/assessment

ELEVATOR SERVICES WORKFLOW PACKS AND A FREE ASSESSMENT