

SITUATION:

Carrier Service in the USA and Canada is required to submit a commissioning report for every machine started up. Since August 2002, Carrier Commercial Service has been tracking the return rate of Commissioning Reports for Chillers with billed startups. The current system of returning the reports requires the office to fax reports to two locations, NAC Customer Assurance and Denise Cross. The paper copies are for use by service engineering. Internal Mail is used to transfer reports to Charlotte or as needed, to the other factories.

An examination of reasons for “missing” commissioning reports showed several causes:

- (1) Missing or multiple job numbers for a single startup job caused the majority of confusion surrounding missing reports. It was relatively easy to resolve the situation of actual missing reports.
- (2) Use of “S”, “M” or “C” job numbers to report startups. Startup jobs are billed with T numbers.
- (3) Reports sent to one of the locations but not both.

SOLUTION:

Different solutions exist for the USA / Canada and other international locations. An electronic solution to speed up the process and provide archival data for the branches has been identified for the USA and Canada.

For the USA and CANADA ONLY

(1) When setting up a job on C8, remember to use the correct equipment type and job type. A rooftop can be declared as equipment type: “RFTP”. A startup job is job type: “SU”.







(2) Job numbers for startups should always be “T” jobs. If you have a startup report recorded as an “S”, “M” or “C” job, it is most likely incorrect, and you will not receive credit for having turned it in. Assign the commissioning report to the correct “T” number. If there are multiple “T” numbers assigned to the same job, this can be communicated via e-mail to Jacqueline McIntosh, who can correct the database.

(3) Effective immediately, please use DOCUSHARE to return all commissioning reports.

Docushare is a web based document storage and retrieval system. The system is presently used for Service USA and National Account Customers. Adding the Commissioning Start Up reports to Docushare will virtually eliminate lost reports. It will ***no longer be necessary to fax the information to two locations*** (Eric Adams and Denise Cross). Additionally, the branch will be able to view the information in the Commissioning Report Folders to determine if the reports were sent.

Instructions:

If you currently use DocuShare for Service USA, the basic procedures are the same. The *only difference is the addition of the Commissioning report folder*, as noted below:

-  **1 - Inbox**
Inbox for job folder documents
-  **2 - Active Jobs**
This is where all current job folders are stored
-  **3 - Archived Jobs**
This is where jobs will be stored for 6 Months
-  **4 - Service Agreements**
This folder contains all Service Agreement folders
-  **5 - Account Information**
Detailed and General Account Information
-  **6 - Commissioning Reports**

The site: DocuShare Site: <http://svcusadocs.carrier.utc.com/>

NAMING COMMISSIONING REPORT JOBS:

The file naming convention follows:

Job Number(sp)COM-##(sp)4DIGITMODEL(sp)date

EXAMPLE: 304T12345 COM-01 19XR 03-06-03

Job Number – C-8 number assigned to job

COM – Denotes a Commissioning Report in DocuShare

-01 - If there is more than one report per job #, the reports should be numbered -01, -02, etc. The first report would be as shown in the example above, the 2nd report would be noted as follows 304T12345 COM-**02** 19XR 03-06-03

Model # - The model # within the name will allow quick retrieval by the product groups

Date – Be sure to use a dash between the date; i.e. 03-06-03; We use USA style dates (month-day-year)

Enter into DocuShare – Commissioning Report – Submit folder:

Once the report is named and saved on your hard drive, drop and drag the file to the Commissioning Report – **1- Submit** folder, as noted below:

Appears In:

- [1 - Submit](#) [msdt1e3](#) 01/13/2003 0
- [2 - Open](#) [msdt1e3](#) 01/13/2003 0
- [3 - Processed](#) [msdt1e3](#) 01/13/2003 4
- [4 - Forms](#) [msdt1e3](#) 01/15/2003 1

Once **processed** by Carrier Service, the reports will be moved to **3 – Processed**. The equipment group will then distribute the report via e-mail as necessary for technical action, and put the report into the appropriate month’s folder for storage. Processing involves recording the job information. While viewing the reports in the “Processed” folder, please do not move them into a month’s folder, as this step must be done by the equipment group.

For your convenience a copy of the **current Commissioning Report Form** may be retrieved from the **4 – Forms** folder.

If you have any questions relative to the above, or if you need further instructions on DocuShare, please advise Denise Cross.

The DocuShare system is proprietary to Carrier Service in North America and unfortunately cannot be used by international Carrier operations for submission of commissioning reports.

For International Offices ONLY

For offices that fill out the form on the computer, please e-mail the completed commissioning report to: NACCcustomerAssurance@carrier.utc.com (note there are NO spaces in the internet version of the address, however if you use the Carrier Global Address book, the address is “NAC Customer Assurance” – with spaces!). Use of this address avoids having commissioning reports delivered to the author’s e-mail box while traveling and allows faster processing.

For offices which fill the report out by hand, the report can be faxed to: NAC Quality Assurance at the fax number: USA-860-998-2662.

POLICY: This policy affects all startups by Carrier for commercial equipment.
Policy Termination Date: None

Appendix A – Picture of the Commissioning form as of 17 – March – 03
 Note: the fax number is incorrect below, but is correct in the text and on the form.

Start-up Commissioning Report
 Carrier Commercial Service

Today's Date: _____

Unit / Job Data		Office / Start-up Data		Returned Parts Information	
Model Number: _____		Service Office: _____		Airway Bill # / Tracking Number: _____	
Serial Number: _____		Startup Date: _____		Shipper Name: _____	
Job Name: _____		Startup Job Number: _____		<small>Extra Unit Data</small>	
Address: _____		Technician Name (Print): _____		Starter and/or VFD	
City _____ State: _____		Technician e-mail: _____		Drive Manufacturer: _____	
Country: _____		Tech Phone Contact Number: _____		Drive Serial Number: _____	
<small>Overall Startup Information</small>					
If Factory Charged:		Were Repairs Required in order for the Unit to Start and Run?		Total time required for Start-up (hrs): _____	
lbs. Refrigerant added _____ Removed _____		Yes _____ No _____		Total time required for Repairs (hrs): _____	
<small>Describe all Repairs and List all defects that required repair and what was done to correct it below (use more sheets as needed):</small>					
Component	Part Number	Defect or Symptom	Root Cause of Defect (why did it happen?)	How was defect repaired?	
in the Starter/VFD					
in the Controls (sensors, actuators, wiring)					

(International) Fax or e-mail to: NAC Customer Assurance @ USA-860-998-0330
 (Domestic) DocuShare - <http://svcusadocs.carrier.utc.com>

Start-up Commissioning Report
 Carrier Commercial Service

Component	Part Number	Defect or Symptom	Root Cause of Defect (why did it happen?)	How was defect repaired?
Defects in other components: eg. Compressor / Cooler / Condenser / Coils / Fans				
Identify all Leaks		Where did it leak?		
Describe any problems with the visual appearance of the unit			How was the problem repaired?	
Are there any safety issues at the jobsite? If yes, describe:				
Were all of Carrier's system recommendations followed (eg. Flow control, water loop volume, etc)? _____ if no, describe				

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