JOBLINK · QUALITY CONTROL · CUSTOMER GUIDE

Quality Control Engineering Maintenance

Trade packs · job quality plans · inspections and tests · nonconformances quality release · Job Quality Report

Edition: November 2026 · New Zealand first; Australian states and territories

What this guide covers

How to switch on and use JobLink **Quality Control** for engineering maintenance. For plant maintenance, shutdowns, workshop repairs and fabrication: pumps, rotating equipment, pressure equipment, cranes and lifting, process piping, welding and coatings.

Part	For	What's in it
1 · How it works	Everyone	The quality flow, the roles, and what each record means.
2 · Activate trade packs	Quality manager and your appointed reviewer	Why packs are **Draft**, and the steps to review and activate them.
3 · Use it on a job	Project managers, supervisors, inspectors	Quality scope, plan, inspections, nonconformances, release and the PDF report.
4 · Engineering Maintenance	Everyone	Which packs to start with, a worked example and the linked JobLink features.
5 · Fixing problems	Everyone	The messages you may see and what to do.

Records, not certification
JobLink **records** your quality process and the evidence. It does not certify compliance with any standard, code or law, and it never approves anything by itself. Every pack, requirement and approval must be reviewed by a competent person you appoint. This guide is not legal advice.

PART 1

How quality control works

For everyone

1.1 The quality flow



Dark boxes need a signed review: the pack (reviewer appointment), the plan and the release (quality operation appointments).

Record	What it is	Menu
Requirement	One source you must follow (a code, standard, regulator rule or contract clause), with its edition, scope and the evidence it needs.	Quality Control → Planning → Requirements
Trade pack	A reviewed set of inspection definitions for one kind of work in one jurisdiction (for example *[NZ] Pumps and pumping systems*). Each line is a Hold, Witness or Review point.	Quality Control → Planning → Industry Templates (list title: *Quality Trade Packs*)
Quality scope	The actual work site on the job. Its address sets the jurisdiction (NZ or the Australian state).	Job form → **Quality scope** tab
Job quality plan	The pack copied onto one job, then submitted and approved.	Quality Control → Planning → Job Quality Plans
Inspection / test	The result and evidence for one plan line, accepted or rejected by a reviewer.	Quality Control → Inspections & Equipment → Inspections & Tests
Non-conformance	A failure: contain it, correct it, verify it, close it.	Inspections & Equipment → Nonconformances
Quality release	The sign-off that every blocking item on the job is resolved.	Releases & Reports → Job Quality Releases
Job Quality Report	The issued PDF of the job's quality record, filed in Documents.	Releases & Reports → Job Quality Report

1.2 Hold, Witness and Review points

Point	Meaning in JobLink
Hold	Work past this point waits until the inspection is accepted (or a valid contractual concession exists). Open holds block the quality release.
Witness	Someone (customer, engineer, inspector) is invited to attend. The result is still recorded and reviewed.
Review	A document or competence review, for example the approved design or a worker's licence.

1.3 Roles

Give roles in **Settings → Users → (user) → Quality Control**. A role lets a person use the screens; it is **not** an appointment. Signing a pack, plan or release also needs a current appointment (Part 2).

Role	Typical person	Can do
Reader	Office, PMs who only look	See quality records and reports.
Requirement author	Quality coordinator	Draft requirements, packs and plans.

Role	Typical person	Can do
Inspector	Supervisor, tradesperson, QA inspector	Record inspections, tests and evidence.
Requirement reviewer	Your competent technical reviewer	Review and activate requirements and trade packs (with a reviewer appointment).
Safety and competency reviewer	H&S lead	Open private competency evidence and review site safety applicability.
Quality manager	Quality manager	Manage the whole Quality Control app.

Tip
Independent review: the person who accepts an inspection or approves a plan must not be the person who authored it or did the inspection. JobLink checks this.

PART 2

Activate trade packs

For the quality manager, a Settings administrator and your appointed reviewer

2.1 Why every pack shows Draft

JobLink ships a **library** of 50 trade packs for each jurisdiction (New Zealand, and Victoria, New South Wales, Queensland, Western Australia, South Australia and the ACT). They are deliberately **Draft** because:

- Their requirements are **draft references**: the source edition says *Unselected* and there is no effective date yet.
- Many inspection lines start with *DRAFT criterion for domain review:* and every line asks your reviewer to set the sampling basis (units, frequency, coverage, witnesses).
- Nobody has a **reviewer appointment** yet. Without one, JobLink refuses to activate anything.

Activate only what you use
Activating a pack is a technical sign-off. Only activate the packs for work you really do, in the jurisdictions you really work in, after a competent person has reviewed them. Leave the rest as Draft; drafts never appear on jobs.

2.2 The steps

1 **Choose your reviewer and give the role**
Pick the competent person who will review requirements and packs for this company and jurisdiction (for example your engineering manager or QA lead).

Settings → Users → open the user → Quality Control: **Requirement reviewer**. Save.

2 **Record the reviewer appointment**
A Settings administrator opens **Quality Control → Administration → Reviewer appointments → New**:

Field	Enter
User	The reviewer
Company	The company that owns the packs
Jurisdiction	For example *New Zealand* (one appointment per jurisdiction)
Valid from / until	The appointment period
Verification reference	How the appointment and competence were verified, for example the appointment letter number and qualification or registration reference

3 **Review and activate the requirements behind the pack**
As the reviewer: **Quality Control → Planning → Requirements**, filter by the jurisdiction. Open each requirement used by the packs you'll activate.

Complete: **edition** (replace *Unselected* with the actual edition and amendments), **effective from**, classification (legal, contractual or guidance), work trigger (when it applies), source URL and reference, evidence obligations and responsible role. Record the transition basis if you set a transition date.

Click **Review and activate**.

4 **Review the pack**
Quality Control → Planning → Industry Templates (*Quality Trade Packs*). Filter by jurisdiction and trade, and open the pack.

On each inspection definition: confirm the method, replace any *DRAFT criterion...* acceptance text with the actual reviewed criterion, and set the sampling basis. Adjust Hold / Witness / Review as needed.

Domain validation tab: fill the domain review reference, the reviewed clauses and applicability, licence requirements, notification obligations, retention obligations and building transition applicability (write *Not applicable* with the reason where it doesn't apply).

5 **Review and activate the pack**
Click **Review and activate**. JobLink checks the role, the appointment, every requirement and every line, then freezes the pack with the reviewer's name, date and appointment. The state becomes **Active reviewed pack**.

6 **Changing an active pack later**
Active packs can't be edited. Click **New revision**, give the reason, edit the draft revision and activate it. Jobs keep the version they were planned with.

> **More than one company**
> Packs belong to one company. The library is loaded in your main company. A separate company (for example an Australian company) needs its own packs, reviewer appointments and activation in that company.

2.3 Job approval appointments

Signing on a job needs a **quality operation appointment**: **Quality Control → Administration → Quality operation appointments → New** (Settings administrators). Each one names the user, company, job (and optionally a task), jurisdiction, validity dates and the operation:

Operation	Used for
Approve plan definition	Approving the job quality plan
Release inspection point	Accepting or rejecting hold / witness inspections
Verify correction and reopen NCR	Closing nonconformances
Approve contractual concession	Customer-approved deviations
Issue job quality release	The final quality release
Others	Site safety applicability, incident assessment, competency, equipment certificates, dossiers, audits, management review, calibration

PART 3

Use quality control on a job

For project managers, supervisors and inspectors

1 **Set the quality scope**
Open the job → **Quality scope** tab. Choose the **Quality work site**: the actual address where the work happens (never assumed from the customer or your company). Its country and state set the jurisdiction.

Optional: **Additional QC disciplines** for mixed-trade work and **QC work-scope keywords** (for example *pump*, *waterproofing*) to improve pack suggestions.

2 **Pick the pack**
The tab lists **suggested packs** that match the job's discipline and keywords. Click **Refresh suggestions** after changes, then **Use pack**. Only active packs for the job's company and jurisdiction can be used. You can also open a pack and click **Apply to job**.

This creates a draft **Job quality plan** with every inspection definition copied in.

3 **Approve the plan**
Quality Control → Planning → Job Quality Plans → the plan. Adjust it for this job if needed, then **Submit definition**.

Someone with the *Approve plan definition* appointment for this job (not the author) clicks **Approve definition**, or **Return for correction** with a reason.

4 **Record inspections and tests**
Quality Control → Inspections & Equipment → **Inspections & Tests** → New, for the plan line. Record the result, readings, photos and documents, and the calibrated instrument if one was used. **Submit results**.

The reviewer (with *Release inspection point*) clicks **Accept results** or **Reject results** with a reason. After a fix, use **Record retest**; the failed result stays in the history.

5 **Deal with failures**
Raise a **Nonconformance**: **Confirm containment** → **Start correction** → **Submit for verification** → **Verify and close** (by someone with *Verify correction*).

If the customer formally accepts a deviation, record a **Contractual Concession** and have it approved. It never waives a legal or safety requirement.

6 **Issue the quality release**
Releases & Reports → **Job Quality Releases** → New for the job. JobLink lists anything still blocking: missing or unapproved plan, open holds, open nonconformances, critical safety actions or inspections. When nothing blocks, **Issue quality release** (needs *Issue job quality release*).

7 **Issue the Job Quality Report**
Releases & Reports → **Job Quality Report**: **Issue PDF and file** files the PDF in Documents under the job; **Issue and download** also downloads it. Issued PDFs never change; use **New report revision** for a corrected issue. If filing fails, use **Retry filing**.

Older jobs
Already-running jobs: Quality Control → Administration → **Adopt Legacy Jobs** brings older jobs into the quality process and keeps a history of what was adopted.

PART 4

Engineering Maintenance

Where to start, a worked example and linked features

4.1 Packs to review first

Trades in the library that fit engineering maintenance: Mechanical maintenance, Fabrication / welding, and Electrical where your crews do it. Each name below exists for New Zealand as *[NZ] …* and for each Australian state and territory as *[VIC] …*, *[NSW] …* and so on.

Group	Packs
Mechanical maintenance	Pumps and pumping systems · Rotating equipment and condition monitoring · Mechanical maintenance and machinery overhaul · Hydraulic machinery systems · Pneumatic systems and compressed air · Conveyors and material handling · Machine guarding and energy isolation · Shutdown turnaround and restoration · Mobile plant and heavy equipment maintenance
Pressure and lifting	Pressure vessels and receivers · Boilers and steam systems · Process piping and pipework · Cranes hoists and winches · Lifting equipment and rigging
Fabrication / welding	Welding and metal fabrication · Non-destructive testing and inspection · Protective coatings and corrosion control · Structural steel erection and bolting
Electrical (if in scope)	Electrical installation and industrial maintenance · Instrumentation automation and controls · Switchboards and control panels

Every pack starts with three common lines (scope and edition basis; health, safety and environmental controls; licences, competencies and reviewer authority) and ends with certification records and controlled handover. The lines in between are specific to the work.

4.2 Worked example: Pump overhaul at a customer's plant

- Job site: the customer's plant address (this sets the jurisdiction).
- Packs: *[NZ] Pumps and pumping systems*, plus *Welding and metal fabrication* if you weld.
- Hold points: scope and edition basis; health, safety and isolation controls; final certification records and handover. Witness points as your reviewer sets them (for example a run test).
- Evidence: test sheets, photos, calibrated instrument used, the Isolation Certificate.

4.3 Linked JobLink features

Feature	How it fits
Maintenance Compliance	Isolation Certificates and the Maintenance Compliance Report sit beside QC. The health and safety hold point uses those native isolation records; QC does not replace them.
Maintenance evidence for release	The Job Quality Maintenance add-on adds maintenance operational evidence to the final job quality release check.
Equipment	Quality Control → Inspections & Equipment → **Equipment Dossiers** (handover dossiers per asset), **Technical Certificate Reviews** (OEM / inspection-body certificates) and **Calibration Evidence** (instruments used for tests).
Workforce (optional)	Job Quality Workforce adds scoped QC holds, competency and SDS checks for the people on the job.

4.4 Tips

- Start with the 5–8 packs you use every week. Leave the rest as drafts.
- Shutdowns: apply packs to each job (or linked site job) at planning, so hold points exist before the outage starts.
- Record the instrument used on each test so calibration evidence can be checked.

PART 5

Fixing problems

The messages you may see and what to do

Message	What to do
Pack activation requires a quality reviewer for the allowed company.	Give the user the **Requirement reviewer** role and make sure the pack's company is selected in the company switcher.
A current verified requirement review authority for this company and jurisdiction is required.	Add or renew the **Reviewer appointment** for that user, company and jurisdiction (Part 2, step 2).
Document the domain review reference and explicit clauses, licence, notification, retention and building transition scope.	Fill every field on the pack's **Domain validation** tab.
Replace draft library criteria with the actual reviewed source...	An inspection definition still starts with *DRAFT criterion for domain review:*. Write the real acceptance criterion.
Every pack line requires a current, effective reviewed requirement.	Activate the requirement behind each line first (Part 2, step 3), with an effective-from date.
Select the actual source edition before review…	Replace *Unselected* or *TBD* in the requirement's edition.
Quality scope is not assessed…	Set the **Quality work site** on the job's Quality scope tab, and split multi-jurisdiction sites into linked site jobs.
The actual job site jurisdiction and company must match the reviewed pack.	Use a pack for the job's jurisdiction and company, or correct the work site.
Independent review must be performed by someone other than the author or inspector.	Ask another appointed person to approve or accept.
Quality release is blocked…	Open the readiness list on the release and resolve each blocking item.
Reviewed packs are immutable. Create a new revision.	Use **New revision** on the pack.

Good to know

- Reviewer and operation appointments expire on their *valid until* date. Renew them before they lapse.
- If a requirement gets a newer reviewed revision, packs using the old one stop being usable until you make and activate a new pack revision.
- Everything signed records who, when and under which appointment. Nothing signed is ever overwritten.
- JobLink records your quality process; it does not certify compliance. Not legal advice.