E-Report

User Manual

2011

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Part I

1 Getting Started

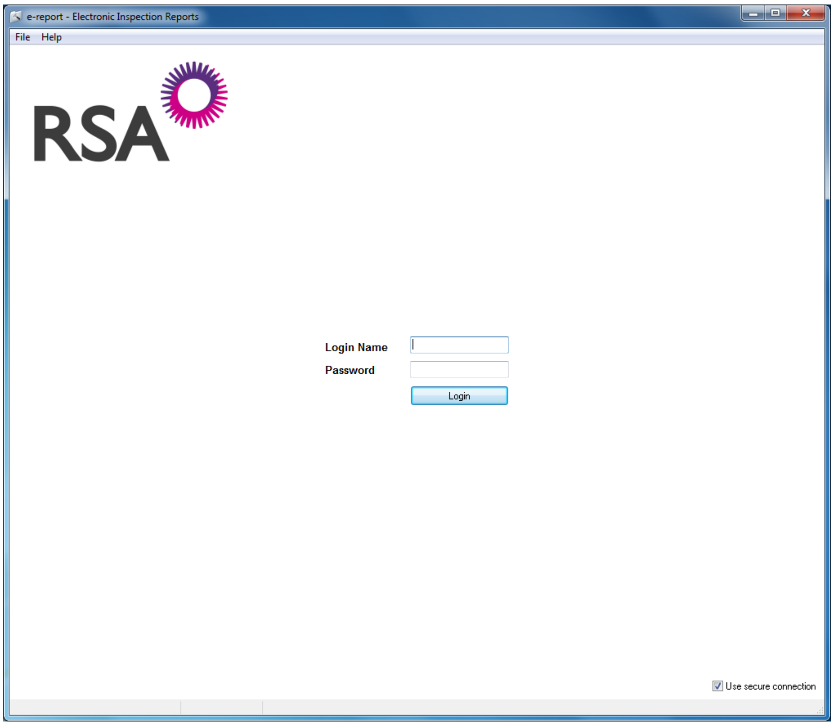
1.1 Logging On

Double-click on the E-Report icon to access the Logon screen.

E-Report requires a Username and Password to be entered before access is allowed. This is to:

- ensure that the correct data is made available to individual users,
- protect the integrity of data stored, and
- ensure that the correct security settings are applied to prevent misuse of the system.

Logon Screen



1. Enter the login name and password (as provided by LMP or the System Administrator) into the appropriate boxes.
2. Where a secure internet connection is required, place a tick in the "Use secure connection" box.
3. Click **Login**.

NOTE: Usernames and passwords within E-Report are not case sensitive – "M.BROWN", "M.Brown", and "m.brown" are all valid. However, the use of punctuation, or spaces between characters, is relevant and where applicable should be maintained.

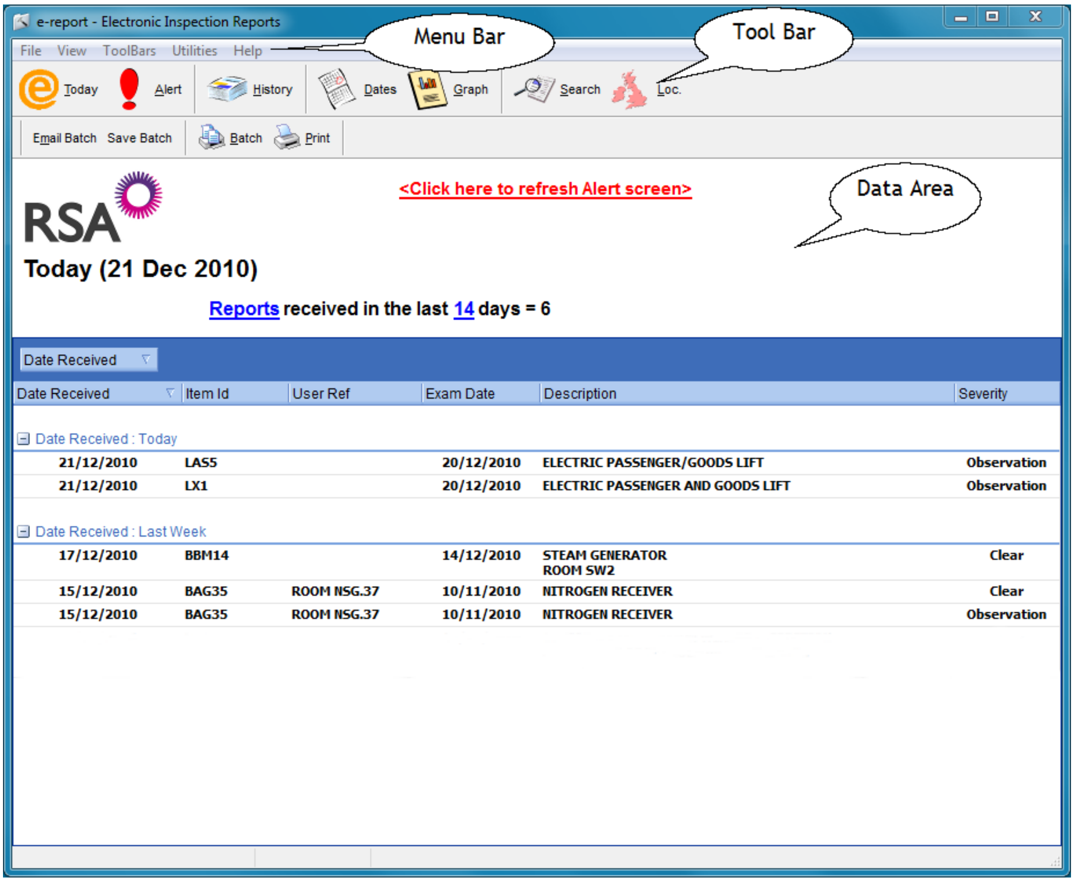
1.2 Exiting E-Report

To exit E-Report and close the program, either:

- Select File > Exit from the Menu Bar, or
- Click the cross in the top right hand corner of the screen.

1.3 Screen Layout

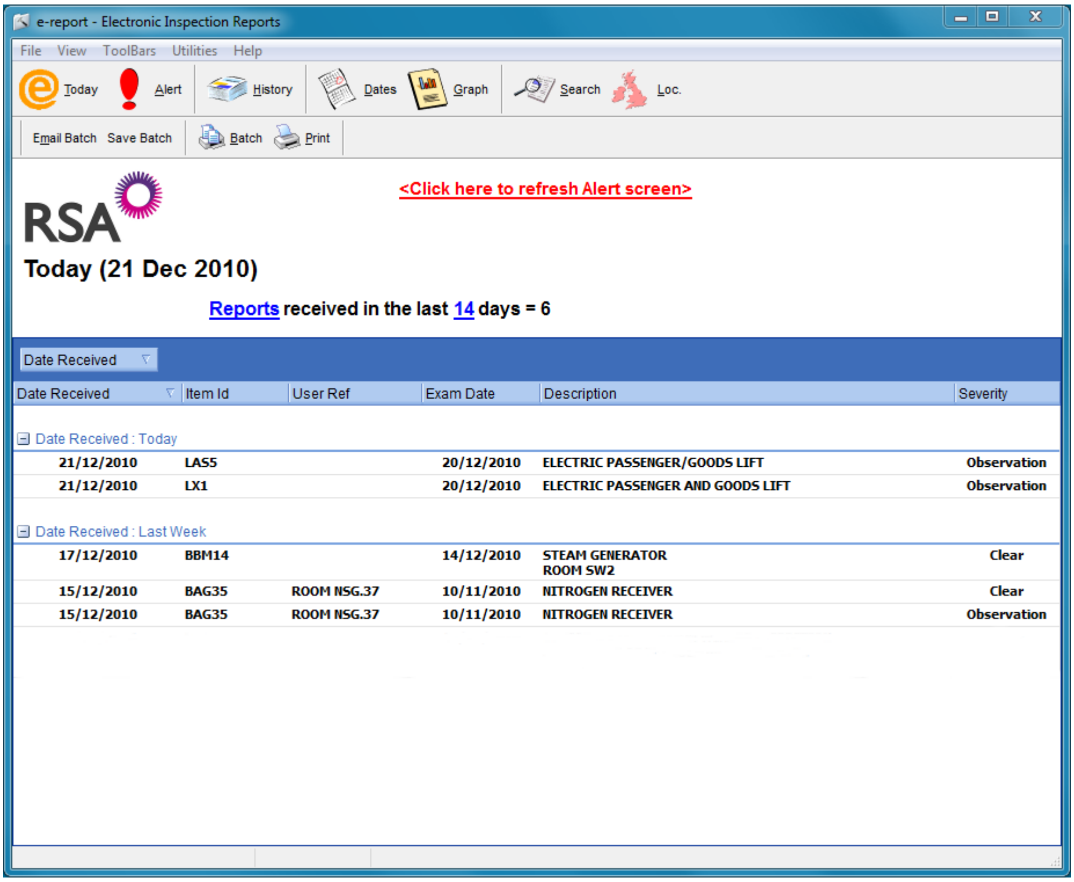
All screens within E-Report share a similar format:



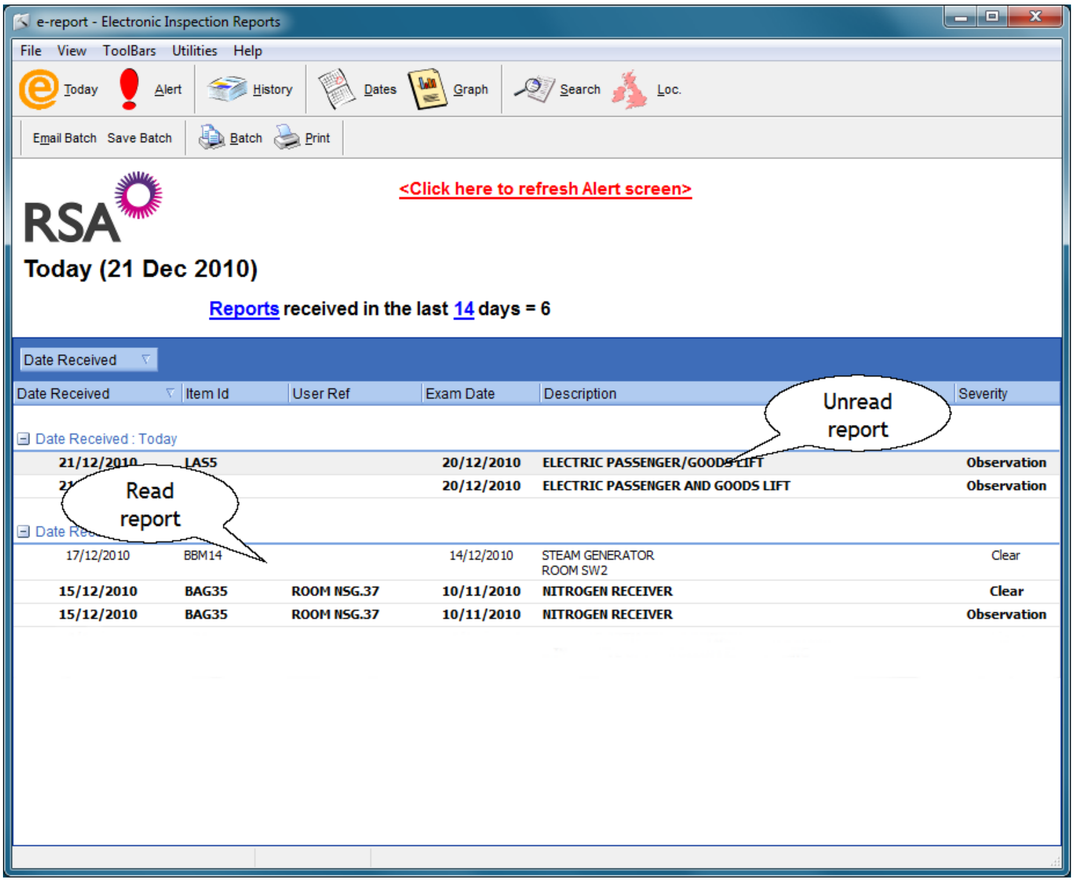
- Menu Bar - this consists of File, View, Toolbars, Utilities and Help menu options and remains static throughout E-Report.
- Tool Bar - the main navigational point within E-Report. Click on a Tool Bar option to move to that screen.
- Data Area - information requested from E-Report is displayed in the Data Area. Data displayed, and actions that can be carried out on the data, vary from screen to screen.

1.4 Today

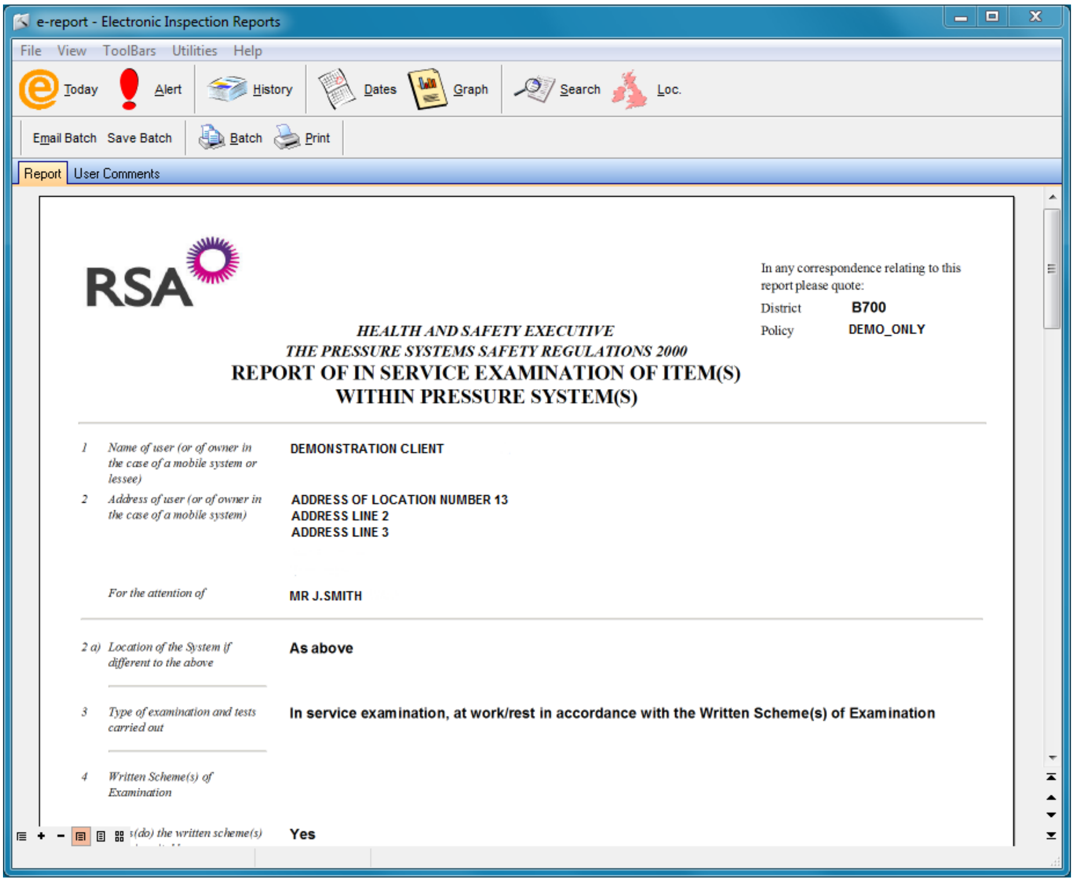
After logging in, E-Report will open onto the "E-Report Today" screen:



The Today screen is E-Report's equivalent of an email inbox. As reports are received, summary details are displayed on the Today screen. Reports that have not been read display in a bold font making them easily distinguishable from those that have been read (normal font):



To read a report, double click on the appropriate summary details:



Once the report has been read, click  to return to the Today screen.

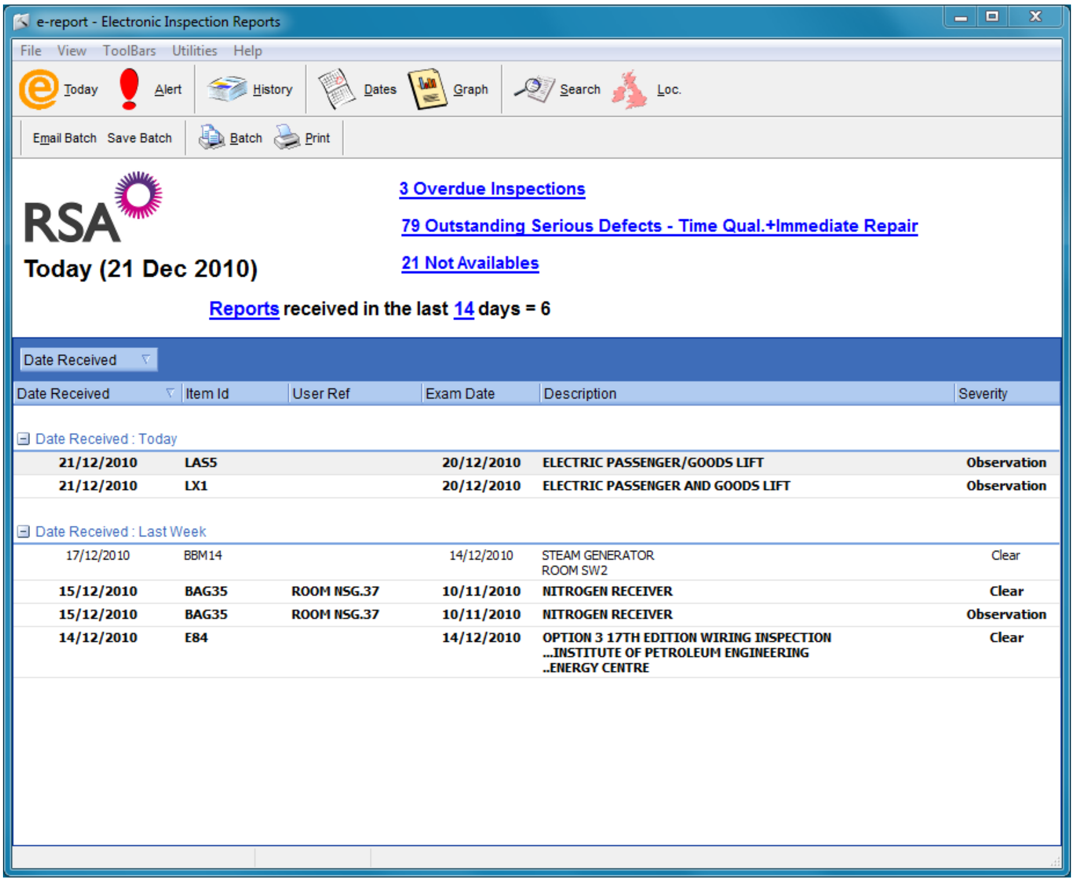
To mark a report as Unread:

1. Right-click in the Data Area of the screen.
2. Select **Mark As Unread** from the subsequent menu.
3. The Today screen will refresh to show the report as Unread.

By default, the Today screen displays a list of reports received within the last 14 days. This view may be altered to show items rather than reports, and the time-frame can be changed to 1, 7, 14, 21 or 28 days. To choose to view items or to change the time-frame, click on Reports or 14 and select the required option from the subsequent drop-down list.

Alert details

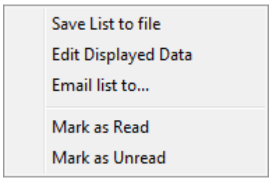
Clicking on <u><Click here to refresh Alert screen></u> will display the Alert screen. If the Today page is reselected, the view will alter:



Clicking on any of the links will switch the view to the Alert screen and display the relevant tab.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

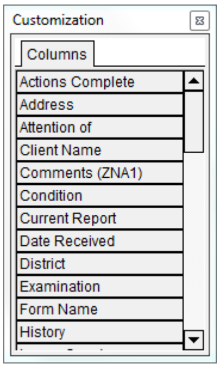
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
    - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
    - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

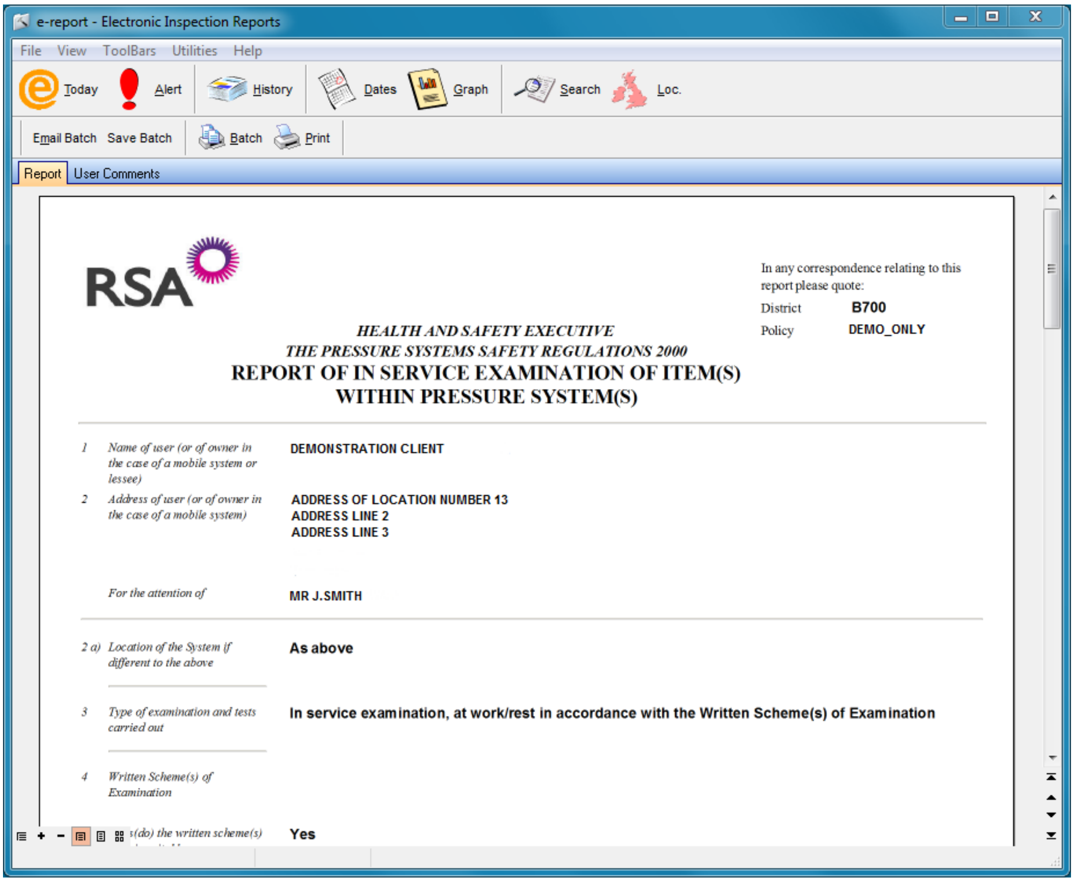
Printing report lists

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

Part II

2 Reports

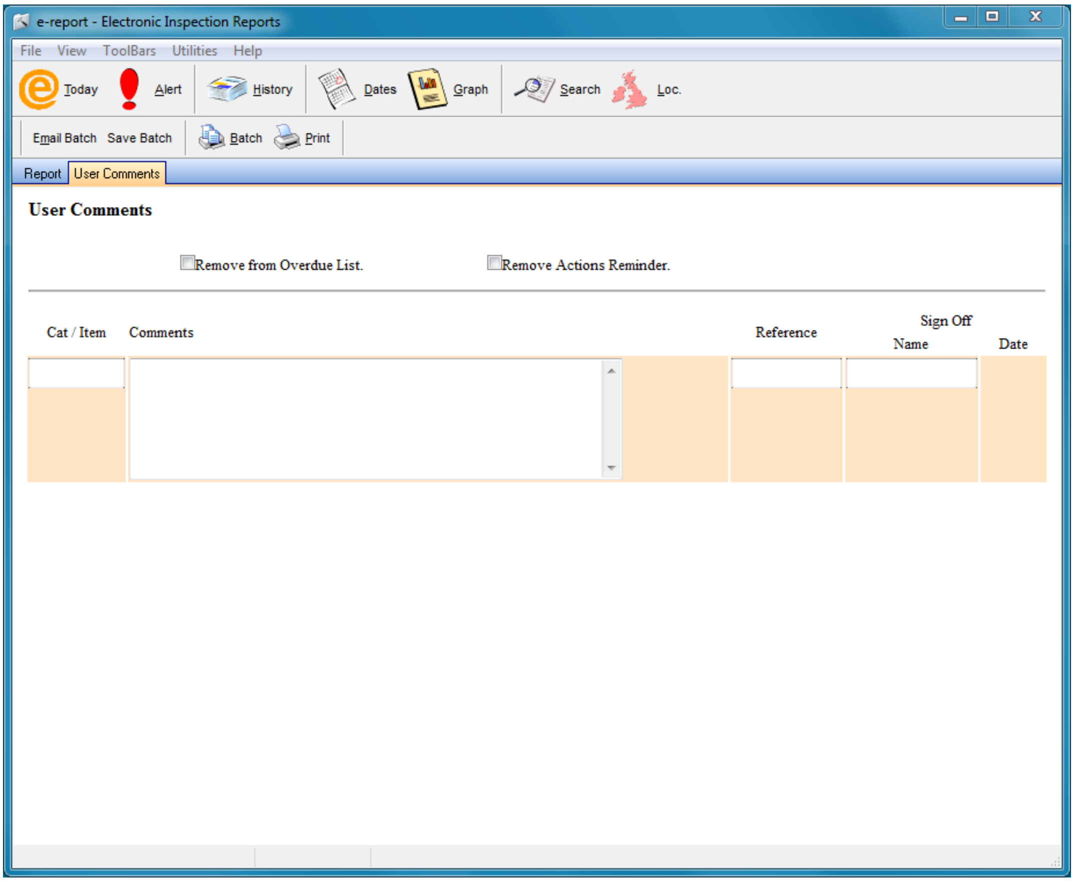
To view a report, double-click on the appropriate report details in the data area of the screen. The selected report will be displayed in a similar format to a paper version:



Normally, the entire report will not fit onto the screen, so a scroll bar at the right hand edge allows a view of the whole report to be obtained through scrolling up or down.

User Comments

Uniquely, electronic reporting offers a User Comments section as a separate tab. This enables the tracking of actions performed as a result of the report, and also allows the action and overdue reminders for a particular report to be cleared:



To record a comment:

Field Name	**Action**	**Result**
Remove from Overdue List	Single click	Once selected, the current report will no longer appear on the "Overdue Inspection" list of the Alert screen.
Remove Actions Reminder	Single click	Once selected the current report will no longer appear on the "Outstanding Defects" list of the Alert screen.
User Comments	Text entry	Click into the box under "User Comments" and input the required text. Information input here will be stored against the current report and, where selected, will appear in subsequent printouts.

NOTE: There is no 'Save' button in E-Report. Changes are saved automatically on exit from the screen.

Printing a report

To print a copy of the report currently displayed either:

- Select File > Print from the Menu Bar, or
- Click the  icon on the Tool Bar.

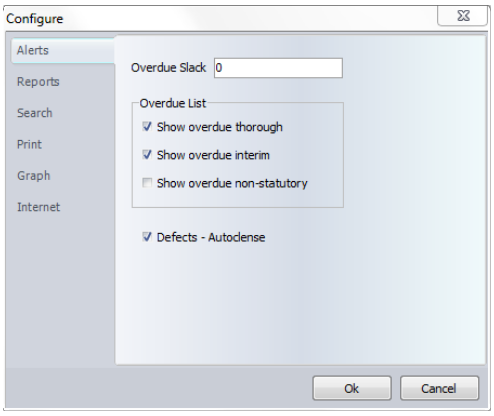
The standard Windows print control box will open offering a choice of printer. If the selected report is too large to fit onto a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing options

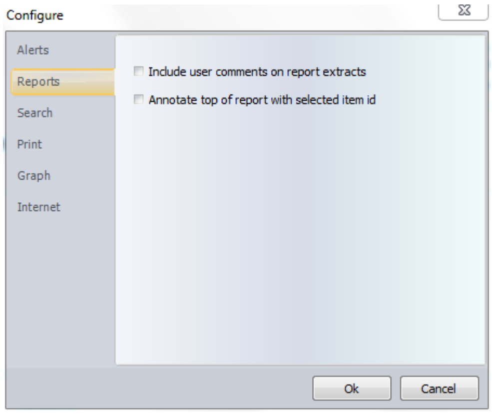
Information contained within printed copies of reports can be customised to include user comments on the printed reports and include the selected item ID at the top of a report. NOTE: Once applied, the selected options will be retained within E-Report unless/until they are reset.

User comments / Item ID

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure" dialog box will open on the **Alerts** tab:



3. Move to the **Reports** tab:



4. Place ticks in the appropriate box(es) as required and click **OK** to apply the setting(s).

Exporting a report

A report may be saved to a file or emailed from E-Report:

To save a report:

1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the report is to be saved, select the required file type from the drop-down list and set a filename.
4. Click **Save**.

To email a report:

1. Right-click in the Data Area of the report.
2. Select "e-mail report to..." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.

4. Add a subject line and any necessary message.
5. Click Send Message. Depending on the Email options which have been set, the report will be sent as either an attachment to the email or as the body of the email message.

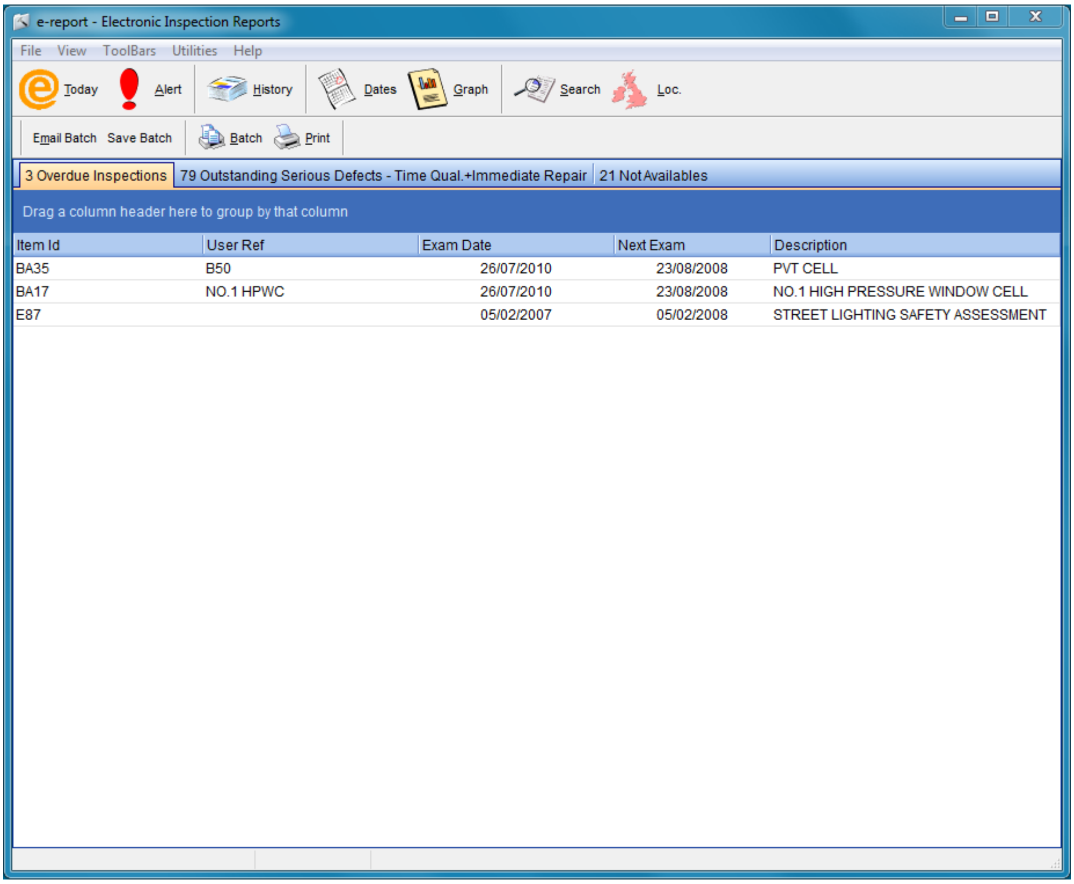
Part III

3 Alert

The Alert screen is accessed either via the 

icon or by selecting the <Click here to refresh Alert screen> on the "E-Report Today" page. It offers an overview, via three tabs, of reports of inspections which:

- have overdue reports listed against them are require a more recent inspection report (Overdue Inspections)
- require remedial action by the owner/user of the plant (Outstanding Repairs)
- could not have an examination carried out (Not Availables)



By default, the Alert screen opens on the Overdue Inspections tab.

Report Listing

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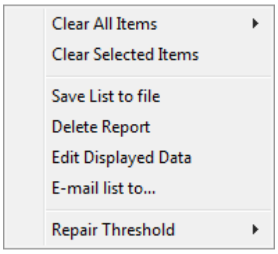

Clear All Items/Clear Selected Items

Depending on the currently selected tab, selecting the Clear All Items option and clicking the Confirm button will clear all overdue inspections, items marked as not available or any defects. Selecting specific items and clicking Clear Selected items will clear these.

Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.

Delete Report

NOTE: This option has no effect. Reports cannot be deleted from E-Report.

Edit Displayed Data

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To add fields to a view:

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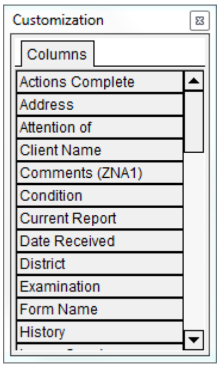

4. Drag the required field name from the Customization box to the header bar on the report list.
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2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

3.1 Overdue Inspections

Details of assets which are overdue for inspection are displayed on the Overdue Inspections tab.

Clearing Overdue Inspections

Overdue inspections are automatically cleared from the Alert screen when a new report is received. However, where an asset has been scrapped or moth-balled, its details may be removed from the Overdue Inspections or Not Availables tabs by amending the User Comments tab on the last received report:

1. Double-click on the required item to view the last received report.
2. Select the User Comments tab at the top of the screen.
3. Click into the "Remove from Overdue List" tick box.
4. Add any necessary detail in the User Comments field
5. Click the 

icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

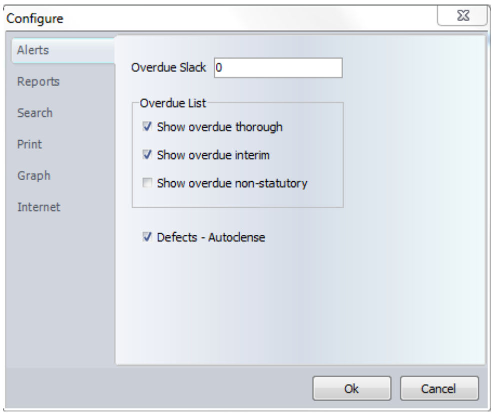
(NOTE: There is no Save button. E-Report automatically saves any changes upon return to the Alert screen).

Overdue Slack period

It is possible to increase the number of days an item has to be overdue before it appears on the Alert screen (Overdue Slack period). By default, the Overdue Slack period is set to 0 (ie items will appear on the Overdue screen as soon as they are overdue).

To increase the Overdue Slack:

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure" dialog box will open on the **Alerts** tab:

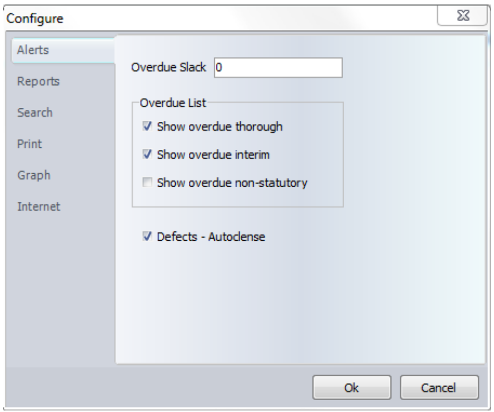


3. Click into the **Overdue Slack** box and input the number of days grace required.
4. Click **Ok**. The Configure box will close and the Alert screen will automatically refresh to reflect any changes.

Overdue List

The reports displayed on the Overdue List may be altered to show overdue thorough, overdue interim, overdue non-statutory or any combination of these inspection types:

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure" dialog box will open on the **Alerts** tab:



3. Click the tick boxes in the **Overdue List** box to toggle the inspection types on and off.
4. Click **Ok**. The Configure box will close and the Alert screen will automatically refresh to reflect any changes.

3.2 Repairs

Repair Threshold

Three levels of repair categorisation are offered by E-Report. The repair thresholds are:

- Immediate Repairs only - statutory repairs requiring immediate attention
- Immediate and Time Qualified Repairs - as above, plus time-qualified statutory repairs
- All Repairs and Observations - as above, plus comments made by the inspector/surveyor.

The currently selected repair threshold is indicated by the name of the "Outstanding Repairs" tab. To change the displayed threshold:

1. Right-click in the Data Area of the Alert screen.
2. Select Repair Threshold and then the required level of categorisation from the subsequent menu.
3. The Outstanding Repairs tab will automatically refresh to reflect the newly selected repair threshold.

Outstanding Repairs

Repair information is automatically cleared from the Alert screen when a new report which does not list any repairs is received. Where an asset is repaired following an inspection, it is possible to remove it from the Outstanding Repairs screen:

1. Double-click on the required item to view the last received report.
2. Select the User Comments tab at the top of the screen.
3. Click into the "Remove Actions Reminder" tick box.
4. Add any necessary detail in the User Comments field
5. Click the 

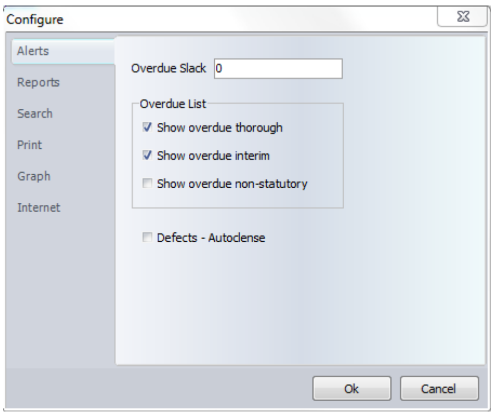
icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

(NOTE: There is no Save button. E-Report automatically saves any changes upon return to the Alert screen).

Autoclense

By default, all outstanding repairs are displayed. This view may be amended to show only those repairs identified on the most recent report through the use of Autoclense:

1. Select Utilities > Configure from the Menu Bar.
2. The "Configure" dialog box will open on the **Alerts** tab:



3. Click into the **Defects - Autoclense** box.
4. Click **Ok**. The Configure box will close and the Alert screen will automatically refresh to reflect any changes.

(NOTE: Autoclense does not clear repairs against older reports, it simply hides them from view).

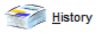
3.3 Not Available

Reports listed on the Not Availables tab are reports of non-inspection. Reasons for the non-inspection are detailed within individual reports. Contact details in order to rearrange an inspection are included within each report.

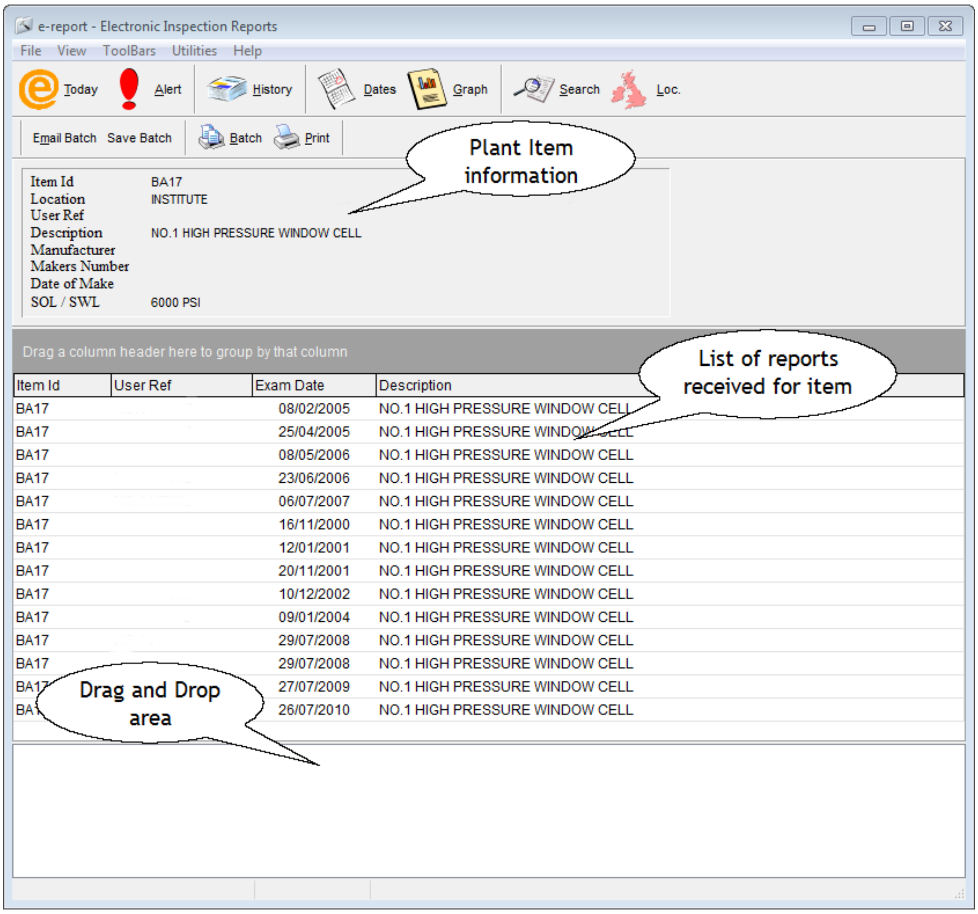
Part IV

4 History

The History screen provides detailed information on a selected item of plant and displays all reports that have been received for the selected item.

HINT: To view the History screen, a report for the relevant item must have been viewed. If a report has not been viewed clicking 

will have no effect.



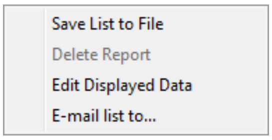
Attaching documents

E-Report enables documents (for example scanned images or Word documents) to be stored on the History screen of an asset through "drag and drop". To attach a document:

1. View the History of the item in question.
2. Navigate to the location in which the required file is held.
3. Click on the appropriate file name and, holding down the left-hand mouse button, drag the file to the Drag and Drop Area of the History screen and release the mouse button.
4. In the subsequent "Document Details" dialog box, select the method to save the document:
   - **Document stored in database** - a copy of the document will be stored in the E-Report database. This is the most secure method of saving a file, as once saved, the document cannot subsequently be altered.
   - **Document stored as link** - saving files as links creates a shortcut from the E-Report database to the location in which the file is held. Any changes made to the file will be reflected in the file accessed by E-Report.
5. Add a Document Description.
6. Click **OK** to save the document, or **Cancel** to abandon the file attachment.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

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Edit Displayed Data

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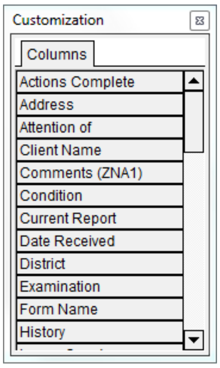

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Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.

4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
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Printing multiple reports

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2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

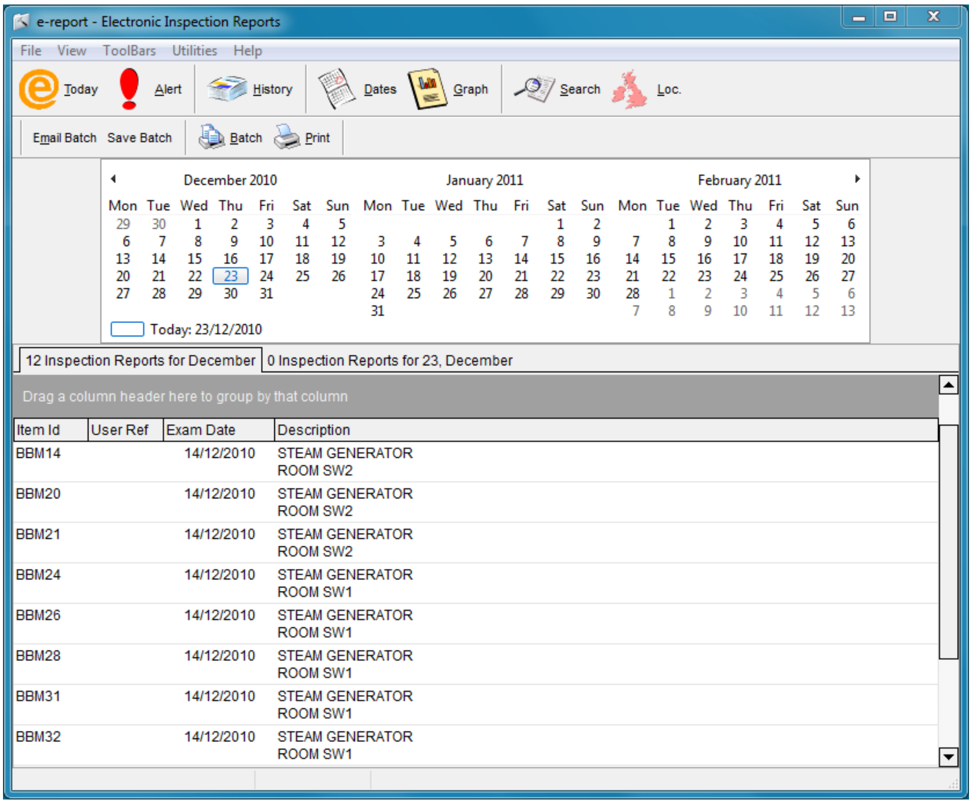
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

Part V

5 Dates

The Dates screen provides details of reports received on a particular day or in a particular month.

To access the Dates screen, select  from the Tool Bar.

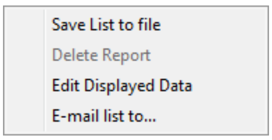


The upper portion of the screen is a calendar which defaults to today's date. The lower portion of the screen has two tabs which display a listing of inspection reports received. By default, the first tab displays reports received in the current month whist the second tab displays reports received on the current day.

Click on an alternate date to change the view to the required date. If the date is not visible on the calendar listing, click one of the displayed Month/Year headings and click to choose as appropriate. Clicking on the Month/Year heading will cause a monthly calendar to display. Clicking on the Year heading on this calendar will group years into decades, clicking again will cause centuries to display.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

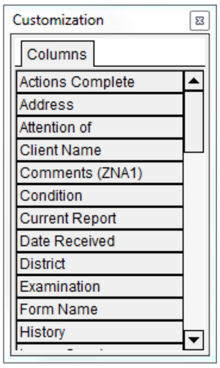
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
    - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
    - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

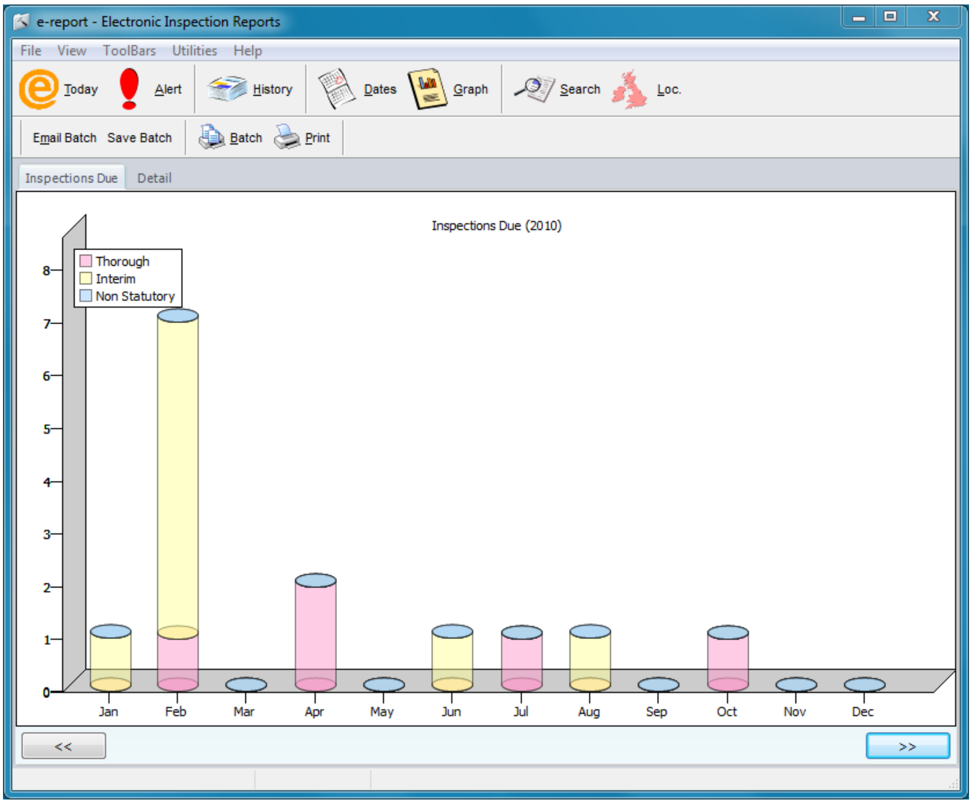
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

Part VI

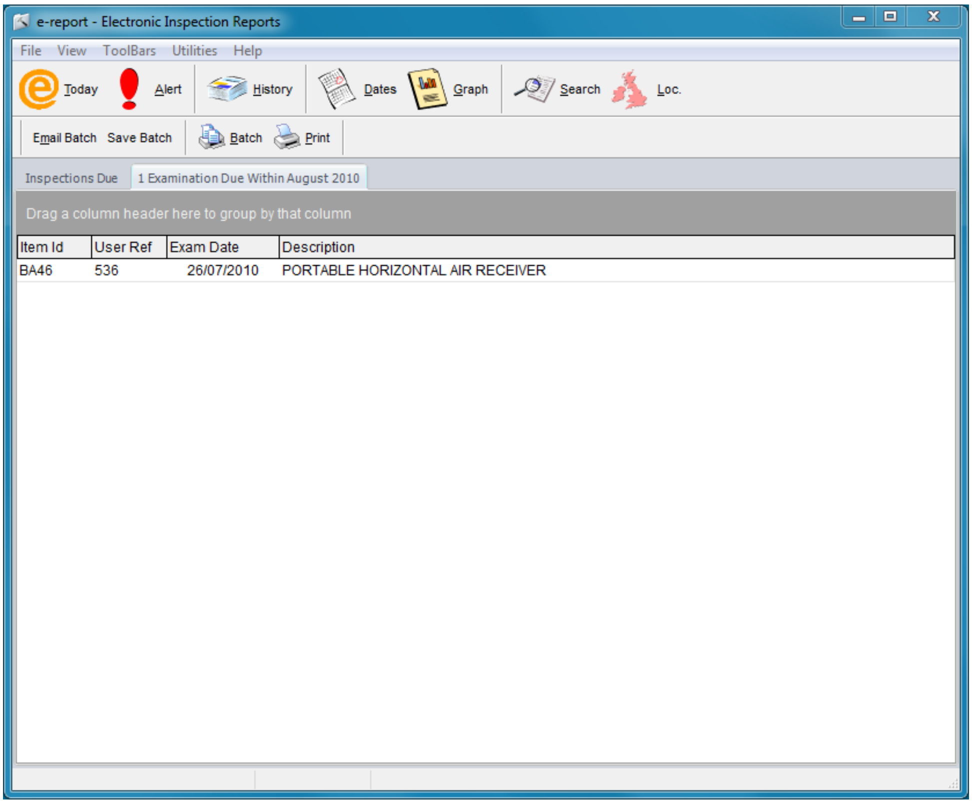
6 Graphs

From information contained within previously issued reports, E-Report produces graphs to show when the next inspection for a particular item of plant is due. To access the graphing option, click 

on the Tool Bar. The Graph screen will open showing a graph of next thorough and next interim exams due within the current year:

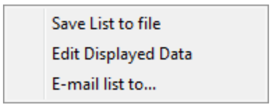


To view the report listing for items due to be examined in a particular month, click on the appropriate bar of the graph. The view will switch to the Detail tab for the chosen month.



Report Listing

The Report Listing on the Detail Tab offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

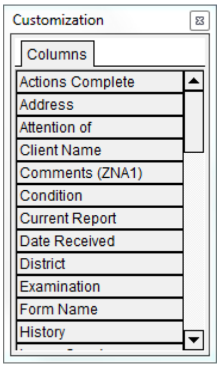
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

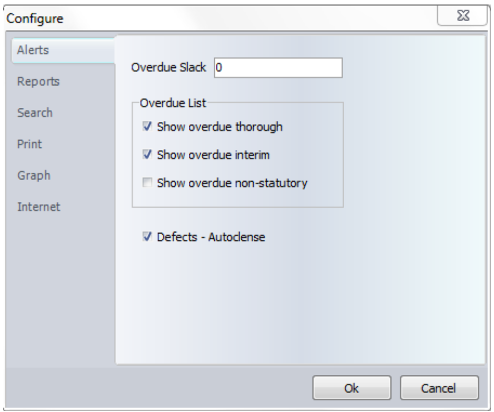
Printing report lists

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

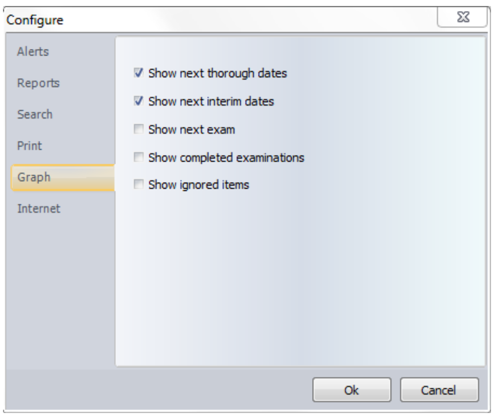
6.1 Graph options

The default options on the Graph screen can be altered to amend the information graphed and displayed.

1. Select Utilities > Configure from the Menu Bar.
2. The Configure dialog box will open:



3. Click on the Graph option:



4. Set the required Graph options:

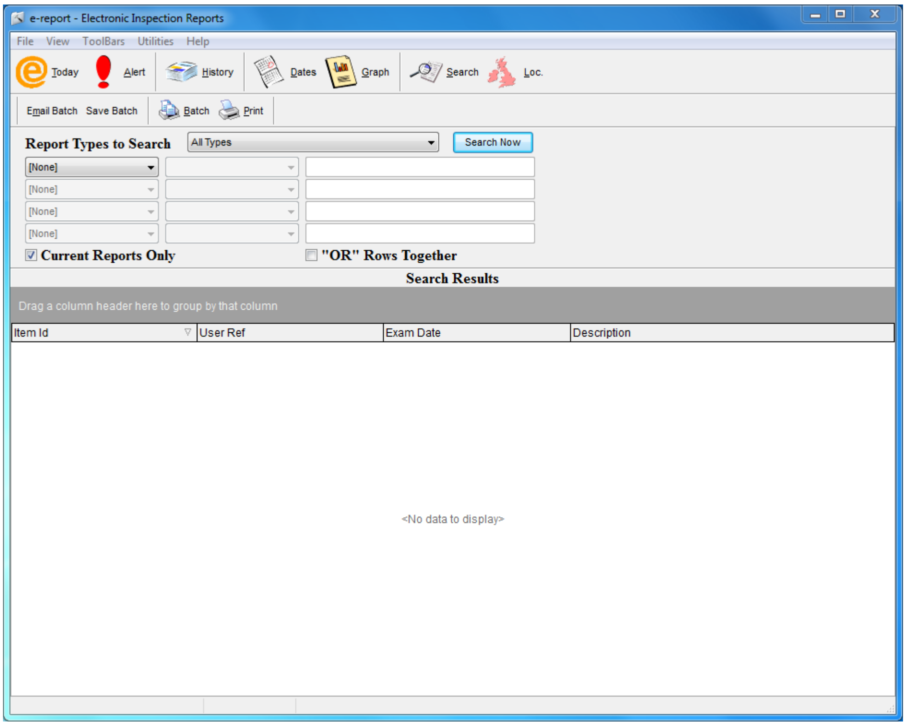
   - Show next through dates - selected by default and shows inspections yet to be carried out
   - Show next interim dates - selected by default and shows inspections yet to be carried out
   - Show next exam - includes non-statutory examinations and shows inspections yet to be carried out

- Show completed examinations - selecting this option causes items for which an inspection has already been carried out to be displayed on the Graph screen.
- Show ignored items - enabling this option will cause reports which have been marked as 'Ignored' (have been marked to be removed from the Overdue List either by a user or through the Autoclense function) to appear on the Graph screen.

Part VII

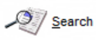
7 Search

Search enables the creation of lists of reports that meet user-defined criteria.



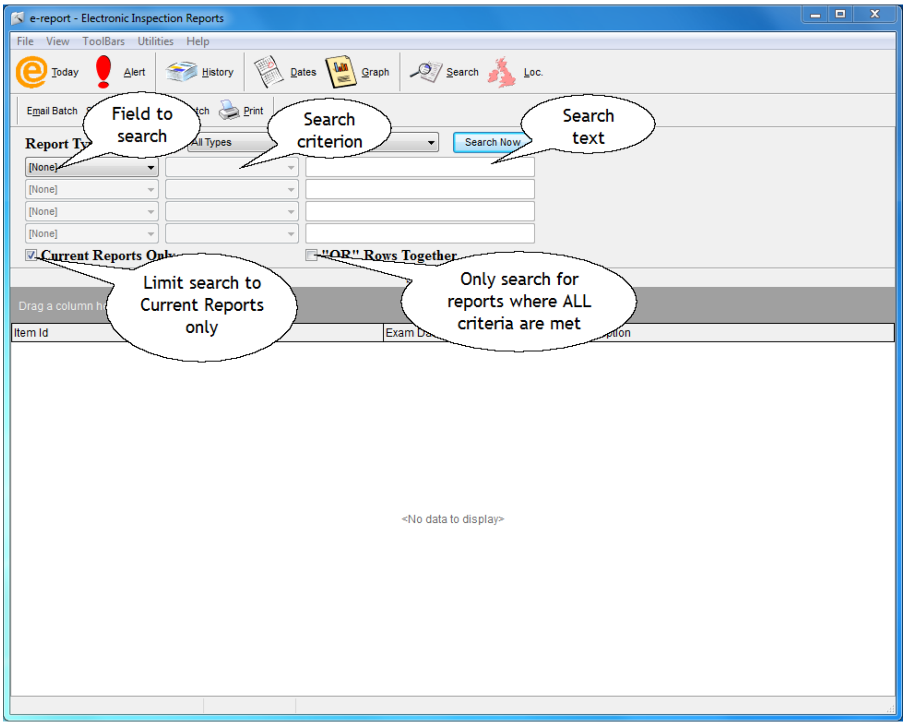
By default, the **Current Reports Only** option is ticked. This means that only the most recently received report for each relevant item is included in the search results. To view every (historic as well as current) report that meets the search criteria, click into the **Current Reports Only** box to turn the option off.

Building a search

1. Select  from the Tool Bar.
2. The Search screen will open as above.
3. Set the "Report Types to Search" from the drop-down list. The default setting is **All Types** but the full listing is:
   - All Types
   - Pressure Plant
   - Lifting Equipment / Lifts
   - Electrical
   - Local Exhaust Ventilation
   - Power Press
   - Not Availables
   - Written Schemes (PRESS)
   - Written Schemes (LOLER)

   Selecting any other type than All Types will restrict the returned search results to just one category of report.

4. Now build the search rules:



i. Select the field to be searched from the drop-down menu in the left-hand box (**Field to Search** box).
ii. Select the appropriate criterion to be applied to the search from the drop-down list in the middle box (**Search Criterion** box). NOTE: Depending on the field selected in the first box a criterion may automatically appear here. This can be amended if needed via the drop-down list.
iii. Input the text to search for in the right-hand box (**Search Text** box).
iv. Repeat steps i-iii in the other rows of the Search screen as required (a maximum of four rows of search terms is available).

5. Toggle the "Current Reports Only" tick box on/off as required.
6. Where more than one row of search criteria is constructed, the rows will by default be linked with an AND command (returning only those records where all criteria are met). To find records where any criterion is met, click into the "OR" Rows Together box.
7. Click **Search Now** to display the results of the search.

Text field criteria

Fields that are text based (for example Item Id, Description, Location, Manufacturer etc) offer the following criteria:

- Contains
- Doesn't contain
- Is exactly
- Is not

For example, to search for reports containing the manufacturer name 'Craven':

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Manufacturer" from the drop-down list in the left-hand search box.
3. Select "Contains" from the drop-down list in the middle search box.
4. Input "Craven" in the right-hand search box.
5. Click **Search Now** to display the results of the search.

Date field criteria

Fields that are date based (for example Next Thorough Date, Exam Date etc) offer the following criteria:

- Is before the
- Is after the
- Is on or before the
- Is on or after the
- Is the
- Is not the

To search for reports with an Exam date between 30 June 2009 and 31 December 2010:

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Exam Date" from the drop-down list in the left-hand search box.
3. Select "Is on or after the" from the drop-down list in the middle search box.
4. Input 30/6/09 in the right-hand search box.
5. In the left-hand search box of the second row, select "Exam Date" from the drop-down box.
6. Select "Is on or before the" from the drop-down list in the middle search box.
7. Input 31/12/10 in the right-hand search box.
8. Toggle the "Current Reports Only" tick box on/off as required.
9. Click **Search Now** to display the results of the search.

Repairs by Severity

It is possible to search for repairs by severity. However, within E-Report, the severity of repairs detailed is stored as a number in the range 1 to 4. The numbers relate to degree of severity thus:

4 Immediate Repairs
3 Time qualified Repairs
2 Observations
1 Clear

Criteria available on the Severity field are:

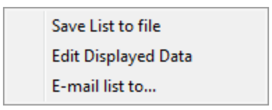
- Is less than
- Is greater than
- Is exactly
- Is not

For example, to search for immediate repairs listed on current reports:

1. Ensure "All Types" is selected in the Report Type field.
2. Select "Severity" from the drop-down list in the left-hand search box.
3. Select "Is exactly" from the drop-down list in the middle search box.
4. Input "4" in the right-hand search box.
5. Ensure "Current Reports Only" is ticked.
6. Click **Search Now** to display the results of the search.

Search Results Listing

The Search Results Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.

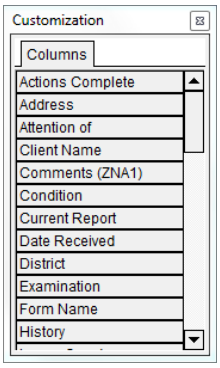
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.

5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

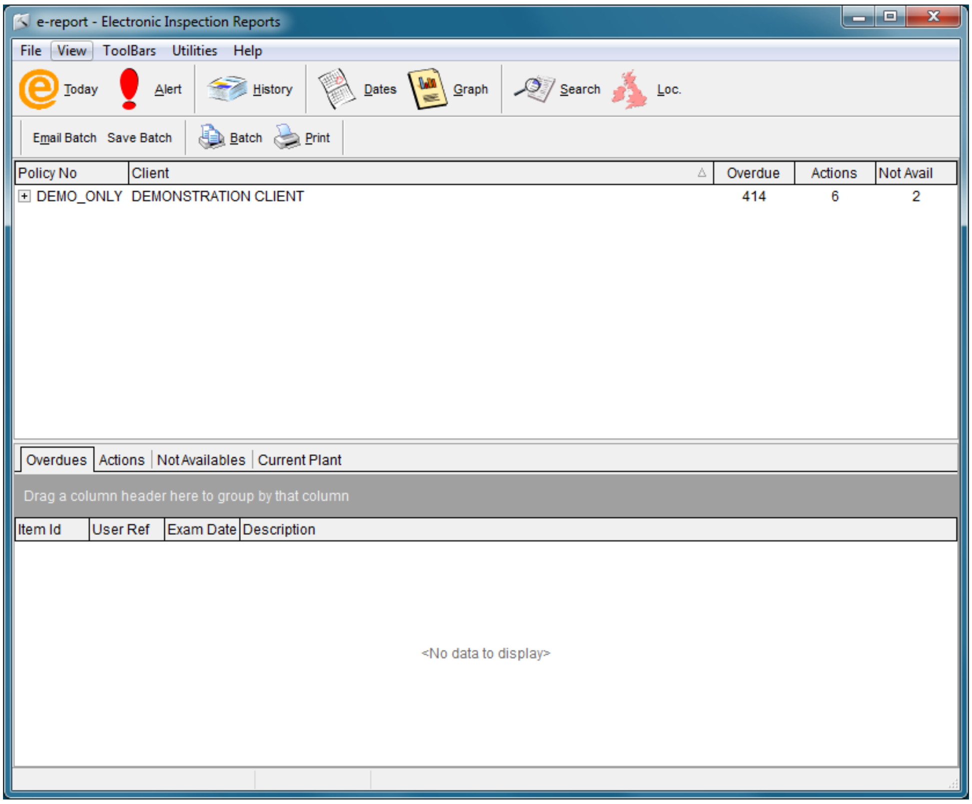
Part VIII

8 Location

The Location view enables the viewing of reports for locations or policies.

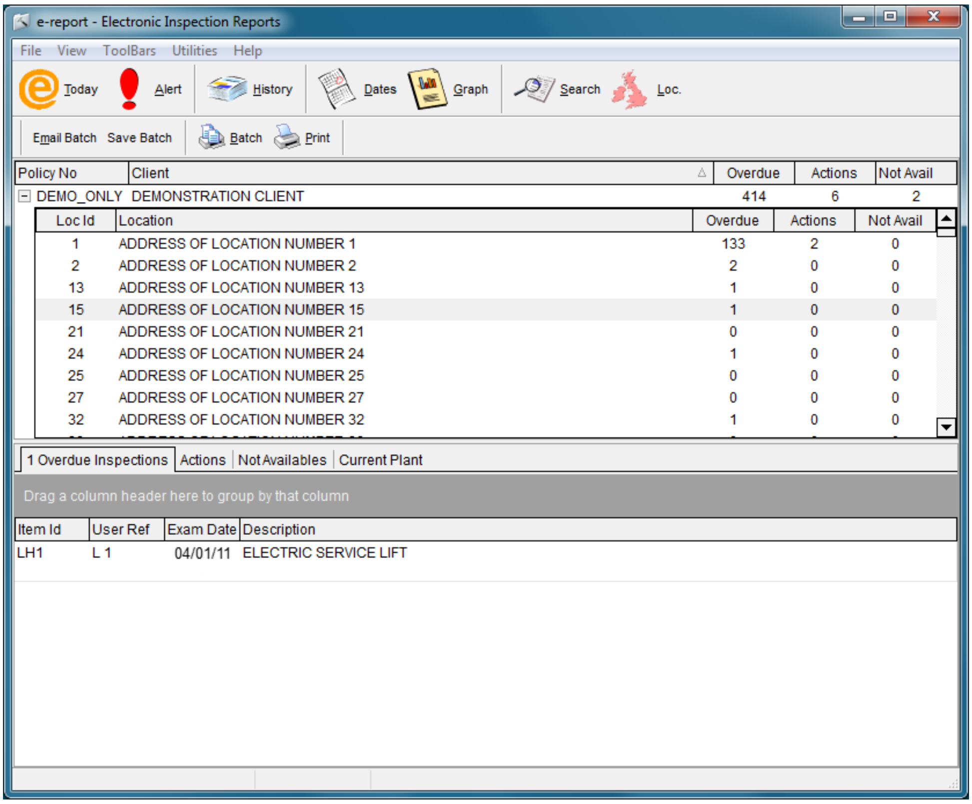
To open the Location screen, select 

from the Tool Bar:



The Location screen is divided into two sections - the top section is a list of locations/companies divided up by policy number. Clicking on the + next to a location/company opens the individual locations for that policy number. The lower section of the screen offers four tabs (Overdue Items, Outstanding Actions, Not Availables and Current Plant) with a report listing for each tab.

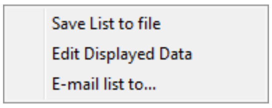
Once a specific location has been highlighted in the upper portion of the screen the Overdues tab will refresh showing a count of overdue inspections and the relevant reports:



Clicking on the other tabs will cause them to refresh and display appropriate data. NOTE: When the Actions tab is selected, its title will change to reflect the repairs/defects setting selected on the Alert screen.

Report Listing

The Report Listing offers a number of options. Right-click in the Data Area to view the options menu:



Save List to file

To save the currently displayed report listing:

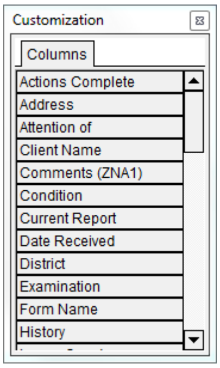
1. Right-click in the Data Area of the screen.
2. Select "Save List to file" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.

Edit Displayed Data

Edit Displayed Data allows the customisation of information presented on the report listing.

To add fields to a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open:



4. Drag the required field name from the Customization box to the header bar on the report list.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data.

To remove fields from a view:

1. Right-click in the Data Area.
2. Select "Edit Displayed Data" from the subsequent menu.
3. The Customization box will open.
4. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse button. The field will be removed from the screen and will instead be listed in the Customization box.
5. Repeat as required and then close the Customization box (click the cross in the top right-hand corner).

Email list to...

To email the currently displayed report listing:

1. Right-click in the Data Area.
2. Select "Email list to...." from the subsequent menu.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

Email multiple reports

To email multiple reports, the option to send email using the local copy of Outlook must have been enabled. See Email Options for information on applying this setting.

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click "Email Batch" on the Tool Bar.
3. Input the email address of the recipient(s) in the blank email which opens.
4. Add a subject line and any necessary message.
5. Click **Send**. The reports will be sent as attachments to the email.

Printing multiple reports

1. Select the required reports:
   - To select reports distributed throughout the listing, select the first report and then hold down the Control key and click on the other required reports. (NOTE: Selected reports will be highlighted in blue).
   - To select reports adjacent to one another, click on the first report, hold down the Shift key and select the last of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the {batch} icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and then click **OK**.

Printing report lists

1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will open offering a choice of printer. Make any necessary changes and click **OK**.

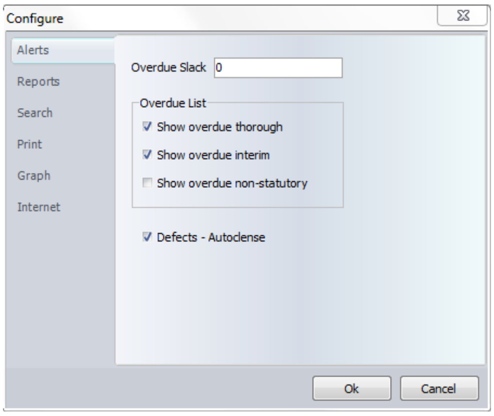
Part IX

9 How To...

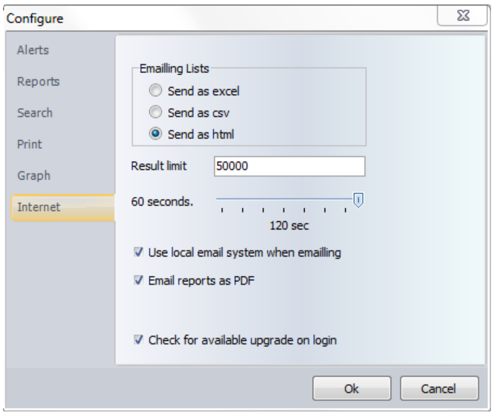
9.1 Email Options

Email options within E-Report can be customized depending on the local email system.

1. Select Utilities > Configure from the Menu Bar.
2. The Configure dialog box will open:



3. Click on the Internet option:



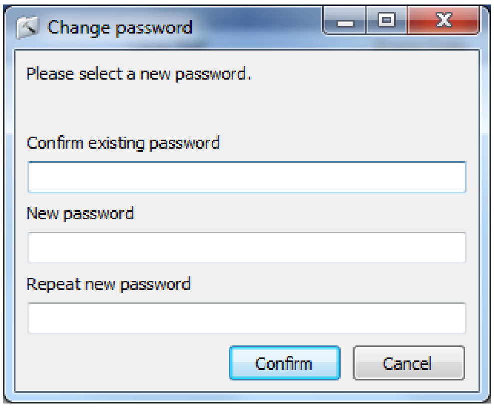
4. Set the required Email options:

- Emailing Lists - by default lists are sent as .html attachments, but options for .xls and .csv formats are available.
- Local email system - by default, emails are sent via E-Report's built-in email package. Selecting "Use local email system when emailing" will mean that messages are sent (and logged) via the local computer.
- Email reports as PDF - copies of reports are emailed as a PDF attachment. Only a few historic reports are not available as PDF documents and these will be emailed in the body of the message.

9.2 Changing the Password

To change a password from that initially supplied:

1. Select Utilities > Change Password from the Menu Bar.
2. The Change Password dialog box will open:



3. Input the current password into the "Old Password" box.
4. Input the new password into the "New Password" and "Confirm New Password" boxes.
5. Click **OK** to save the password change, or **Cancel** to revert to the old password. (HINT: If the current password was input incorrectly, or the two instances of the new password do not match, a Password Error box will display. Click **OK** to be returned to the Change Password box. Re-input the correct details and click **OK** to save the changes).

Part X

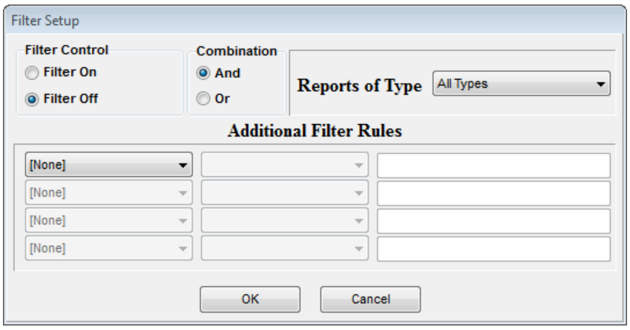
10 Advanced Features

10.1 Setup Filter

The Setup Filter enables a restriction to be placed on the set of reports with which E-Report is currently working - once a filter is applied, all screens within E-Report will only display those reports which meet the filter criteria.

Applying a Setup Filter

1. Select Utilities > Setup Filter from the Menu Bar.
2. The "Filter Setup" dialog box will open:



3. Select **Filter On** in the "Filter Control" box.
4. If a restriction on the type of report is required, click the drop-down arrow in the "Reports of Type" box and select the appropriate report.
5. Apply Additional Filter Rules as required. (NOTE: The Additional Filter Rules are constructed in the same way as a Search).
6. Click **OK** to apply the filter or **Cancel** to abandon the changes.

NOTE: Once a filter has been applied, E-Report will retain the filter between logins. Once the filter is no longer required return to the Filter Setup dialog box, select **Filter Off** in the "Filter Control" box and then click **OK**.

10.2 Grouping, Sorting and Filtering Report Lists

E-Report allows the grouping, sorting or filtering of report lists.

Applying a Grouping

Either

- drag a Column title to the Grouping Area (green arrows indicate where the heading may be dropped into place); or
- insert a new field name in the Grouping Area:
  i. Right-click in the Data Area of the screen.
  ii. Select Edit Displayed Data from the subsequent menu.
  iii. Drag the appropriate field name from the Customization box to the required point in the Grouping Area and release the mouse button.
  iv. Repeat if required and then close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data. (NOTE: The data refresh may take up to a minute to complete depending on the quantity of data affected. Do NOT attempt to re-close the Customization box while the data refresh is in progress.

Once a Grouping has been applied, a sort or filter may be applied to the Grouped data.

Removing a Grouping

1. If a filter has been applied to a Grouping, the filter must be cleared before the Grouping is removed:
   - Click the down arrow on the required field.
   - Select the "(All)" option from the subsequent listing.
2. Now drag the field name from the Grouping Area down into the main area of the screen.
3. Release the mouse button when a large cross appears over the field name. The screen will refresh the view of the data.

Sorting Report Lists

Report lists may be sorted either alphanumerically (the default setting) or reverse alphanumerically. To apply a sort, click on the field name against which the sort is to be applied. The Report Listing with automatically refresh to reflect the sort. Clicking again will reverse the sort order.

NOTE: To sort by more than one column at a time, sort the first column then hold down the Shift key and apply a sort to a second column and repeat as required.

Filtering Report Lists

In addition to the Setup Filter, separate filters may be applied to the field titles on a displayed report listing in order to restrict the view to display only those items which meet the filter criteria.

Applying a Filter

1. If necessary, add additional field names to the Report Listing:
   i. Right-click in the Data Area.
   ii. Select Edit Displayed Data from the subsequent menu.
   iii. Drag the appropriate field name from the Customize box to the required point on the screen and release the mouse button.
   iv. Repeat if required, and then close the Customize box (click the cross in the top right-hand corner) to refresh the view of the data.
2. Click the down arrow on any of the field names and select the required filter type:
   - (All) - displays all data (and therefore removes any previously applied filters).
   - (Custom) - allows complex filtering across a range of criteria (see Custom Filters section for more information).
   - (Blanks) - displays all items which have a blank value in the currently selected heading.
   - (NonBlanks) - displays all items which do NOT have a blank value in the currently selected heading.

   The drop-down arrow will change colour to indicate that a filter has been applied. Once a filter is applied, a Customize bar will appear at the foot of the Data Area.

Removing a Filter

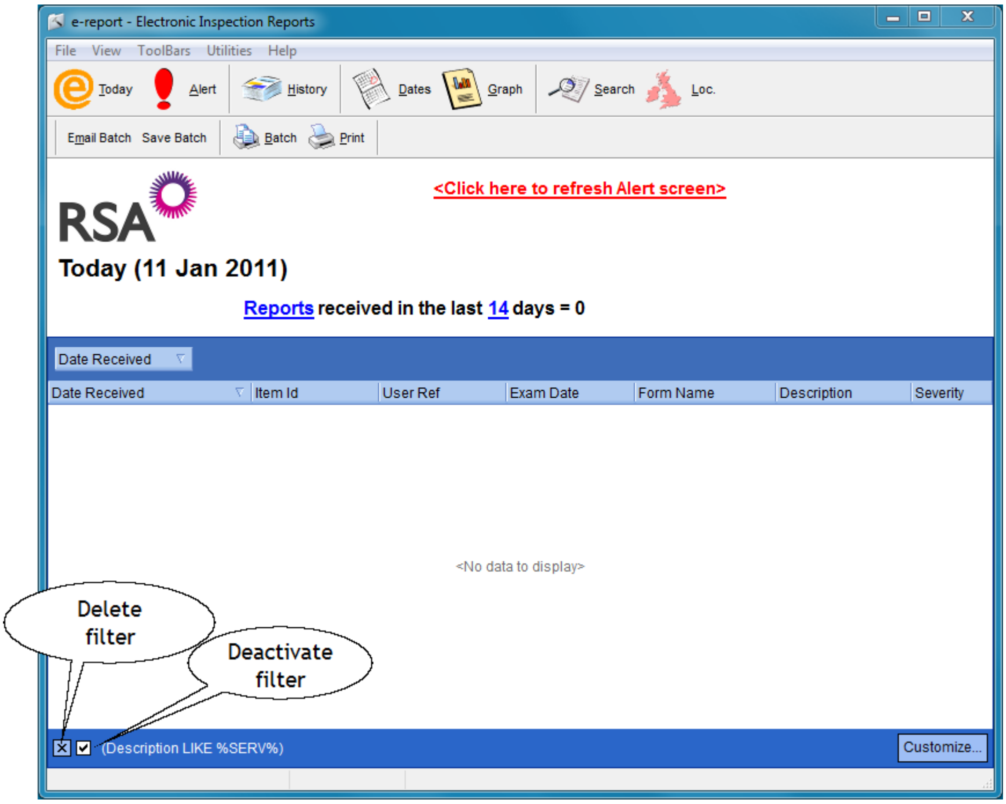
To remove a filter, either:

1. Hover over the name of the filtered field and click the down arrow.
2. Select the "(All)" option from the subsequent pick list. (NOTE: If filters have been applied to more than one field, repeat the above steps to remove the filter on each field); or

1. Click the cross on the Customize bar. (NOTE: This will clear all filter criteria currently applied).

Custom Filters and the Customize Bar

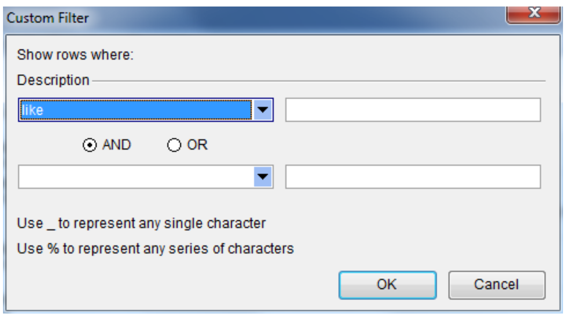
The Customize Bar appears at the foot of the Data Area where any filter is applied. The current filter will appear at the left-hand end of the Customize Bar.



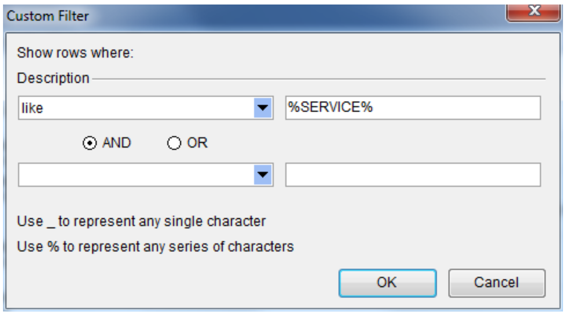
Custom Filters

More complex filters may be created using the "Custom" option:

1. Hover over the field to which the main filter is to be applied, click the drop-down arrow, and choose "(Custom)".
2. A Custom Filter dialog box will open:



3. Complete the lines of the filter as required. (NOTE: Input text should be surrounded by either % or _ to allow for a section of the field to be searched):



4. Click **OK** to apply. The filter will remain in force until it is removed or until exit from E-Report.

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