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The text of this manual is subject to change without notice.

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Getting Started

Part

1 Getting Started

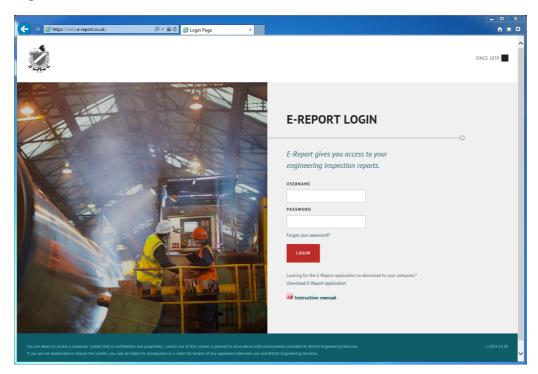
1.1 Logging On

E-Report is accessed via: https://www.e-report.co.uk.

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. Click **SUBMIT**.

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:

- Click Logout on the Menu Bar, or
- Click the cross in the top right hand corner of the screen.

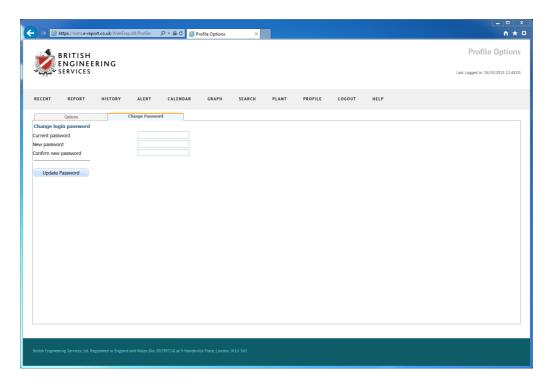
1.3 Help

Context-sensitive help is available on every screen within E-Report. Click **Help?** on the Menu Bar to open a help page containing information relevant to the currently viewed screen.

1.4 Change Password

To change a password:

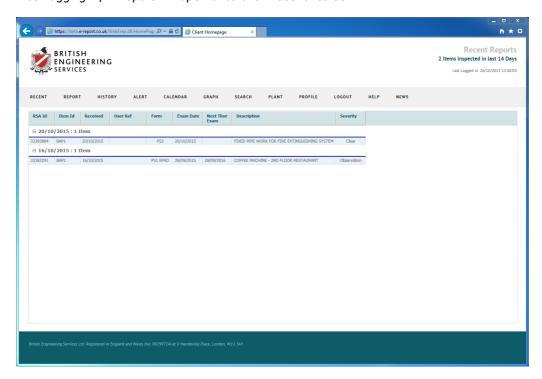
1. Select **Profile** from the Menu Bar:



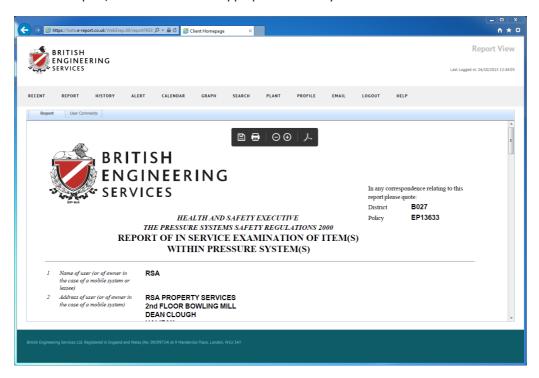
- 2. Input the current password into the **Current password** box.
- 3. Input the new password into the **New password** and **Confirm new password** boxes.
- 4. Click **Update Password**. (HINT: If the current password was input incorrectly or the two instances of the new password do not match an error message will display. Overtype the incorrect entry and click Updated Password again).

1.5 Recent

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



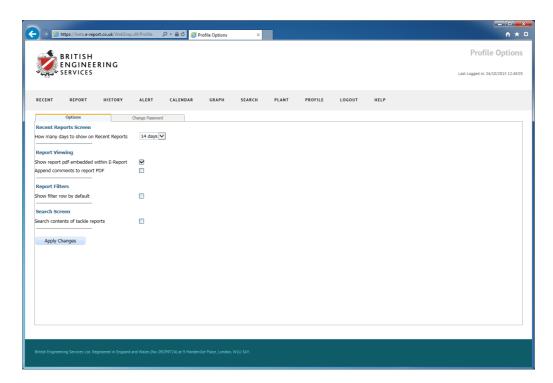
To view a report, double click on the appropriate summary details:



Once the report has been viewed, click Recent or the web browser back button to the Recent screen.

By default, the Recent screen displays a list of reports received within the last 14 days. This time-frame can be changed to 1, 5, 7, 14, 21, 28 or 35 days:

1. Select Profile from the Menu Bar:

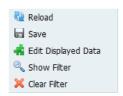


- 2. Choose the required number of days from the **Recent Reports Screen** drop-down box.
- 3. Click Apply Changes.

Return to the Recent screen. This will now have updated to reflect the change made.

Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

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

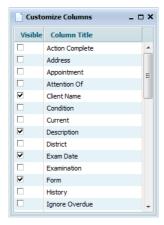
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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 Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

Clear Filter

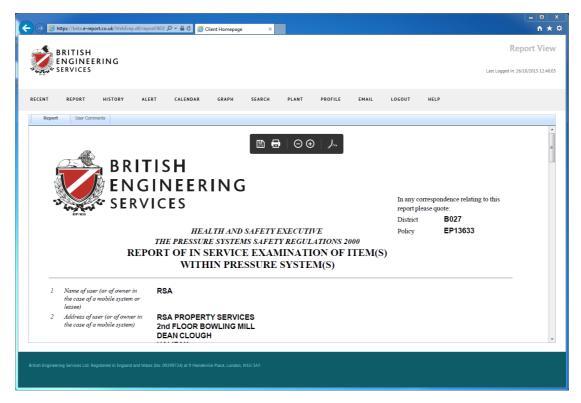
The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

Report

Part III

2 Report

To view a report, either double-click on the appropriate report details in the data area of the screen or highlight a report and click "Report" on the Menu Bar. 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.

Printing, Emailing or Saving a report

Use the normal controls within your PDF viewer to print, email or save a copy of the report.

2.1 User Comments

The User Comments tab offers additional report viewing/downloading options as well as the facility to record information against the report.

Open Report Window

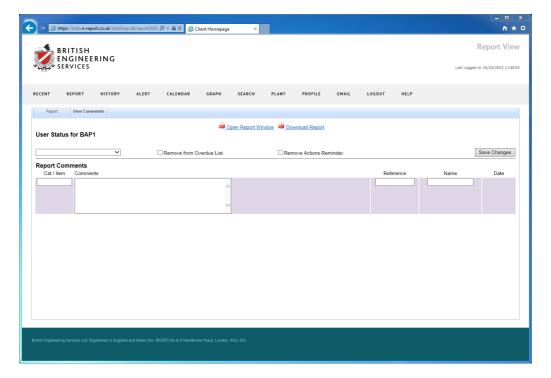
The Open Report Window option will force the report to display in a PDF viewer outside E-Report.

Download Report

Download Report allows the report to be saved to the local computer. Once saved, the report can be emailed from the saved location.

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, a User Status to be added, and also allows the action and overdue reminders for a particular report to be cleared:



Available actions:

Field Name	Action	Result
User Status	Select from the drop- down list	The status selected will be stored against the current report.
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.

Save Changes

Click the **Save Changes** button to store any changes against the current report.

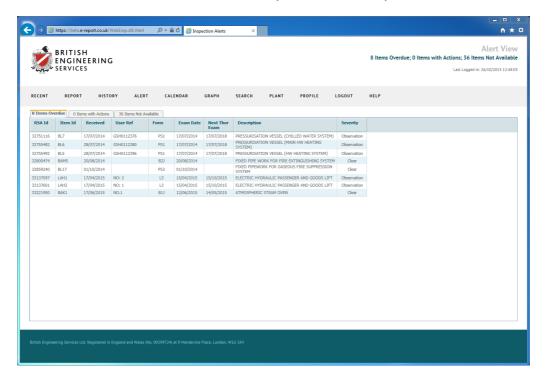
Alert

Part IIII

3 Alert

Choose Alert on the Menu Bar to open the Alert screen. Alert offers an overview, via three tabs, of reports of inspections which:

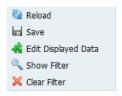
- have overdue reports listed against them are require a more recent inspection report (Items Overdue)
- require remedial action by the owner/user of the plant (Items with Actions)
- could not have an examination carried out (Items Not Available)



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

Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

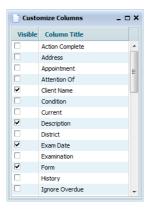
- 1. Right-click in the Data Area of the screen.
- 2. Select "Save" from the subsequent menu.
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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 Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

Clear Filter

The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

3.1 Items Overdue

Details of assets which are overdue for inspection are displayed on the Items Overdue 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 Items Overdue or Items Not Available 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 Save Changes button.

3.2 Items with Actions

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.

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 Save Changes button.

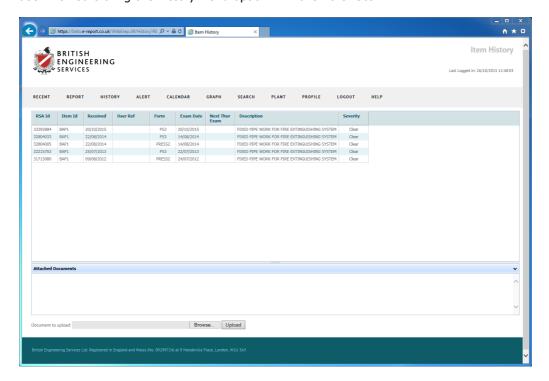
3.3 Items Not Available

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

4 History

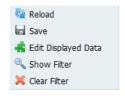
The History screen provides detailed information on a selected item of plant and displays all reports that have been received for the selected item.

HINT: To view the History screen, a report for the relevant item must have been viewed. If a report has not been viewed clicking the History Menu option will have no effect.



Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

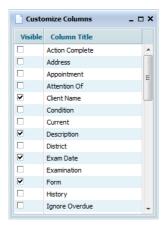
- 1. Right-click in the Data Area of the screen.
- 2. Select "Save" from the subsequent menu.
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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 Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

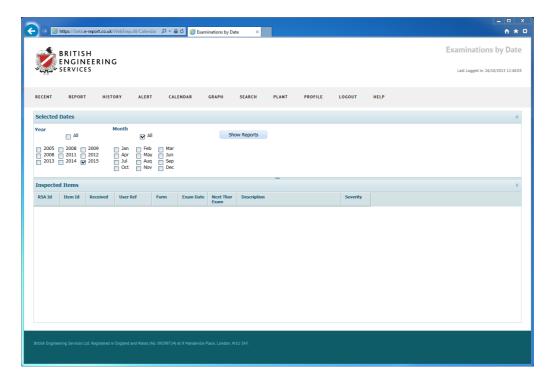
Clear Filter

The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

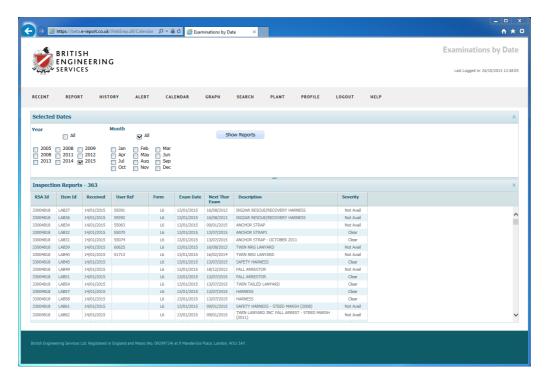
5 Calendar

The Calendar screen provides details of reports received within selected dates.

The upper portion of the screen allows the selection of a set of dates. This defaults to all inspected items within the current year:



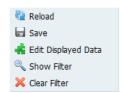
Once Show Reports has been clicked, the lower portion of the screen displays all inspection reports received within the selected dates:



Click on the Year and Month selections to change the view to the required time frame.

Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

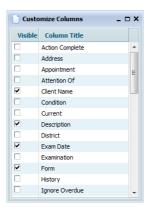
- 1. Right-click in the Data Area of the screen.
- 2. Select "Save" from the subsequent menu.
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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.
- Select "Edit Displayed Data" from the subsequent menu.
- 3. The Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

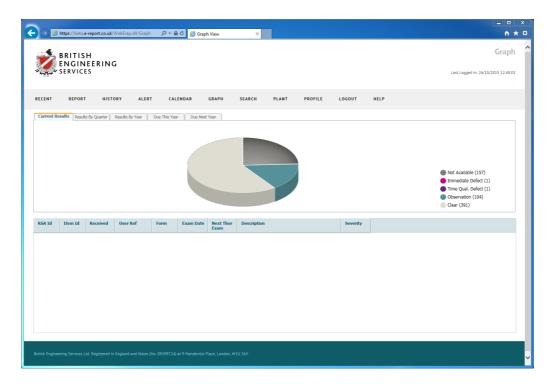
The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

Clear Filter

The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

6 Graph

Graphical management information is presented on the Graph screen.



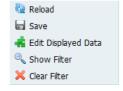
Five tabs are available:

- Current Results a pie chart showing a breakdown of the result of the last examination of each item of plant with a Legend.
- Results by Quarter a bar chart with the result of the examinations carried out in each indicated period. (Legend as displayed on Current Results screen). Hover over a bar to see a breakdown of the results.
- Results by Year a bar chart with the result of the examinations carried out in each indicated period. (Legend as displayed on Current Results screen). Hover over a bar to see a breakdown of the results.
- Due This Year examinations still to be completed for the current year.
- Due Next Year examinations with a next inspection date of the next year.

For each tab, click on the relevant section of the graph to display a list of reports meeting the selection.

Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

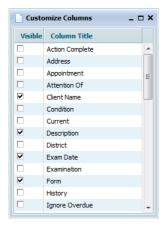
- 1. Right-click in the Data Area of the screen.
- 2. Select "Save" from the subsequent menu.
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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 Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

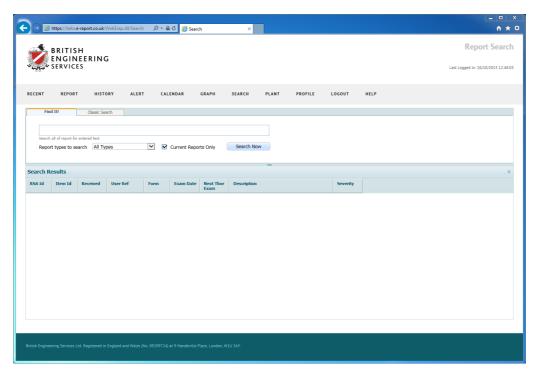
The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

Clear Filter

The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

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. Either:
 - i) enter the search string in the Find It box and press return; or
 - ii) Select the "Classic Search" tab to construct a search as below.
- 2. Select **Search** from the Menu Bar.
- 3. The Search screen will open as above.
- 4. 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.

- 5. Now build the search rules:
 - i. Select the field to be searched from the drop-down menu in the left-hand box (**Field** box).
 - ii. Select the appropriate criterion to be applied to the search from the drop-down list in the middle box (**Rule** 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 (Value 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).
- 6. Toggle the "Current Reports Only" tick box on/off as required.
- 7. 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).

8. 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 **Field** box.
- 3. Select "Contains" from the drop-down list in the Rule box.
- 4. Input "Craven" in the **Value** 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 **Field** box.
- 3. Select "Is on or after the" from the drop-down list in the **Rule** box.
- 4. Input 30/6/09 in the **Value** box.
- 5. In the **Field** 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 Rule box.
- 7. Input 31/12/10 in the **Value** 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

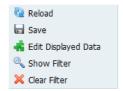
For example, to search for immediate repairs listed on current reports:

1. Ensure "All Types" is selected in the Report Type field.

- 2. Select "Severity" from the drop-down list in the **Field** box.
- 3. Select "Is exactly" from the drop-down list in the **Rule** box.
- 4. Input "4" in the Value box.
- 5. Ensure "Current Reports Only" is ticked.
- 6. Click **Search Now** to display the results of the search.

Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

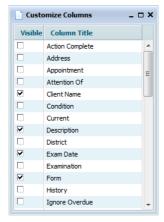
- 1. Right-click in the Data Area of the screen.
- 2. Select "Save" from the subsequent menu.
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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 Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

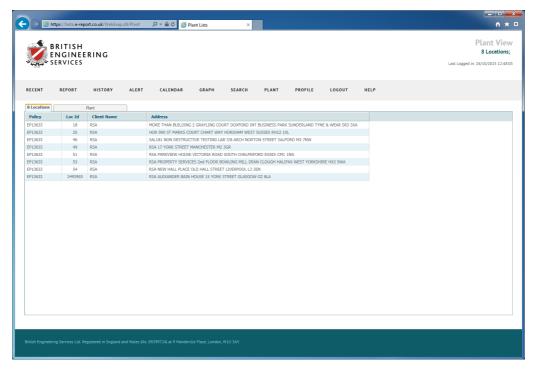
The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

Clear Filter

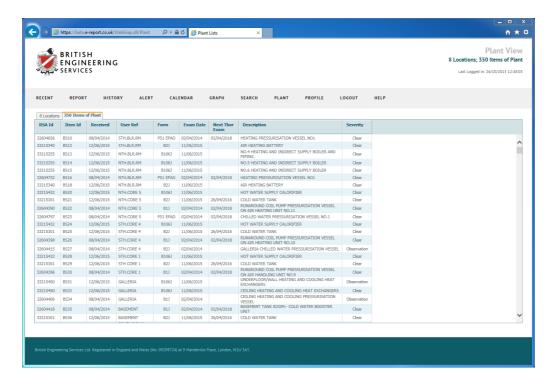
The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

8 Plant

The Plant screen enables the viewing of reports for locations or policies.

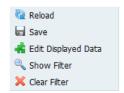


The Locations tab provides a list of locations/companies divided up by policy number and Location ID. Doubleclick on a location row to display the relevant Plant tab which details the most recent report for each current item of plant at the selected location:



Report Listing

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



Reload

This option forces the screen to refresh.

Save

To save the currently displayed report listing:

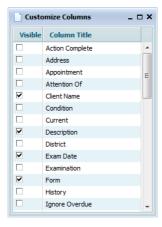
- 1. Right-click in the Data Area of the screen.
- 2. Select "Save" from the subsequent menu.
- 3. Navigate to the location in which the file is to be saved, select the appropriate file type from the dropdown list and set a file name.
- 4. Click Save.

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 Customize Columns box will open:



Fields already visible on the screen are indicated by a tick in the 'Visible' column.

- 4. Place/remove ticks against the field names as required.
- 5. Close the Customize Columns box (click the cross in the top right hand corner) to apply the changes.

Show Filter

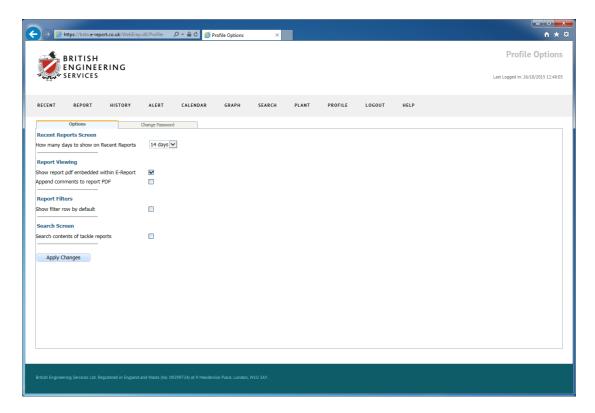
The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

Clear Filter

The Clear Filter option removes any filter that has been applied to the screen. An empty filter row will appear until the screen is refreshed.

9 Profile

Alterations to the user profile can be made via the Profile screen.



Options

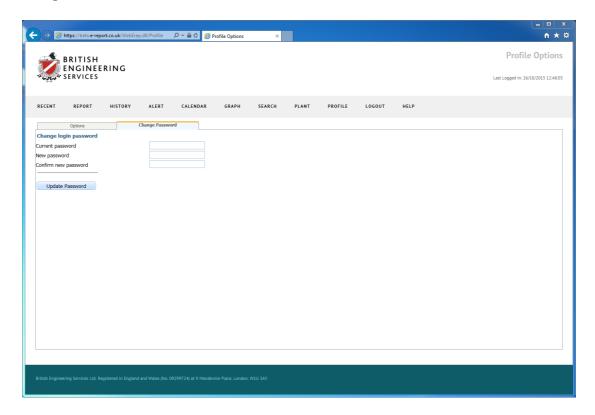
The Options tab displays a list of features that can be customised:

Recent Reports Screen - select the required number of days history to display on the Report screen. Report Viewing - by default, reports are displayed within the E-Report web page. Untick this option to force inspection report PDF documents to appear within an external window.

Report Filters - by default the filter row is hidden on each screen (accessible via the right-click menu options as required). To display the filter row by default, tick this option.

If any changes are made, click the Apply Changes button to save the profile. An 'Options Updated' message will display to confirm that the change has been applied.

Change Password



The Change Password tab allows you to choose a new password for your login.

- 1. Input the current password into the **Current password** box.
- 2. Input the new password into the **New password** and **Confirm new password** boxes.
- 3. Click **Update Password**. (HINT: If the current password was input incorrectly or the two instances of the new password do not match an error message will display. Overtype the incorrect entry and click Updated Password again).

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