E-Report

User Manual

The text of this manual is subject to change without notice. The current version of the manual is available from the e-report documentation page: www.lmp.co.uk/ereport_support.html

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Part I

1 Introducing Electronic Reporting

Q: What is an Electronic Report?
A: An Electronic Report is simply a computer version of a paper report. It looks the same as the original and contains the same information.

Q: Do Electronic Reports replace paper versions of reports?
A: Yes. Electronic Reports remove the need to hold paper copies of reports, though a printed copy can still be produced if necessary.

Q: How do I know if someone has changed a report?
A: Electronic Reports cannot be altered. The functionality of E-Report prevents changes being made to reports.

Q: What are the benefits of adopting Electronic Reports?
A: Time - E-Report will process all reports and automatically identify those which require action.
Peace of mind - E-Report will quickly identify any inspections which are overdue.
Faster reporting - a report can be received within minutes of leaving the inspecting authority.

Part II

2 Getting Started

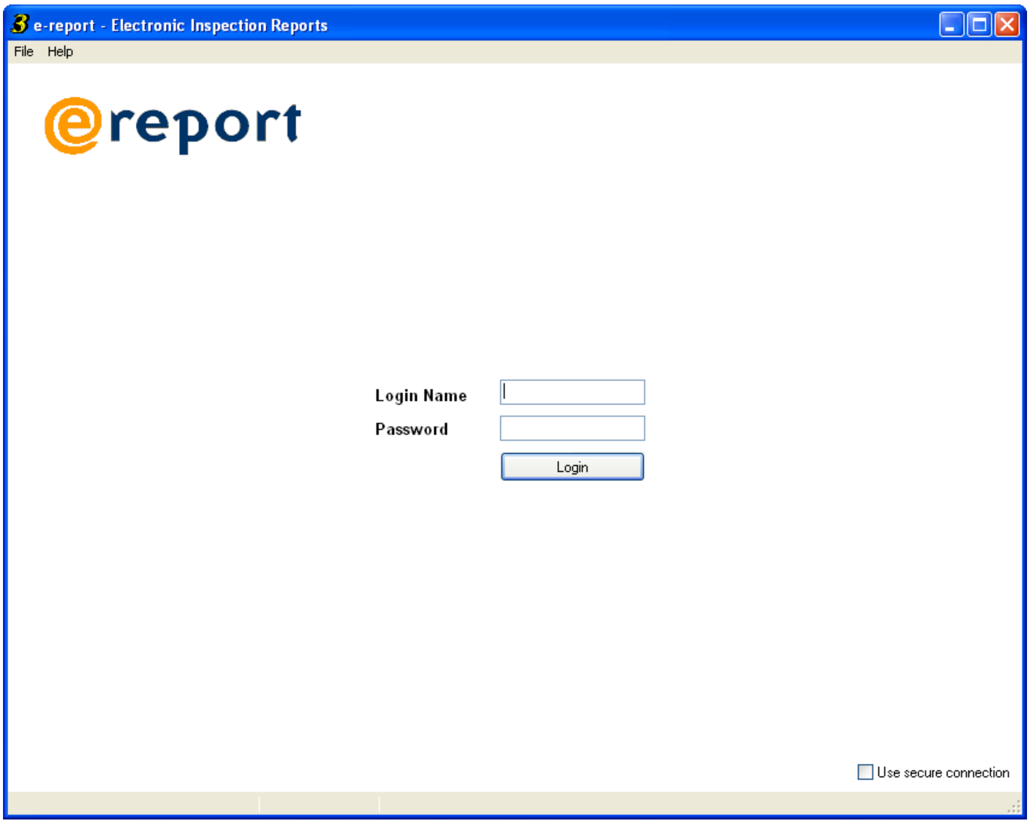
2.1 Logging On

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" checkbox.
3. Click **Logon**.

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.

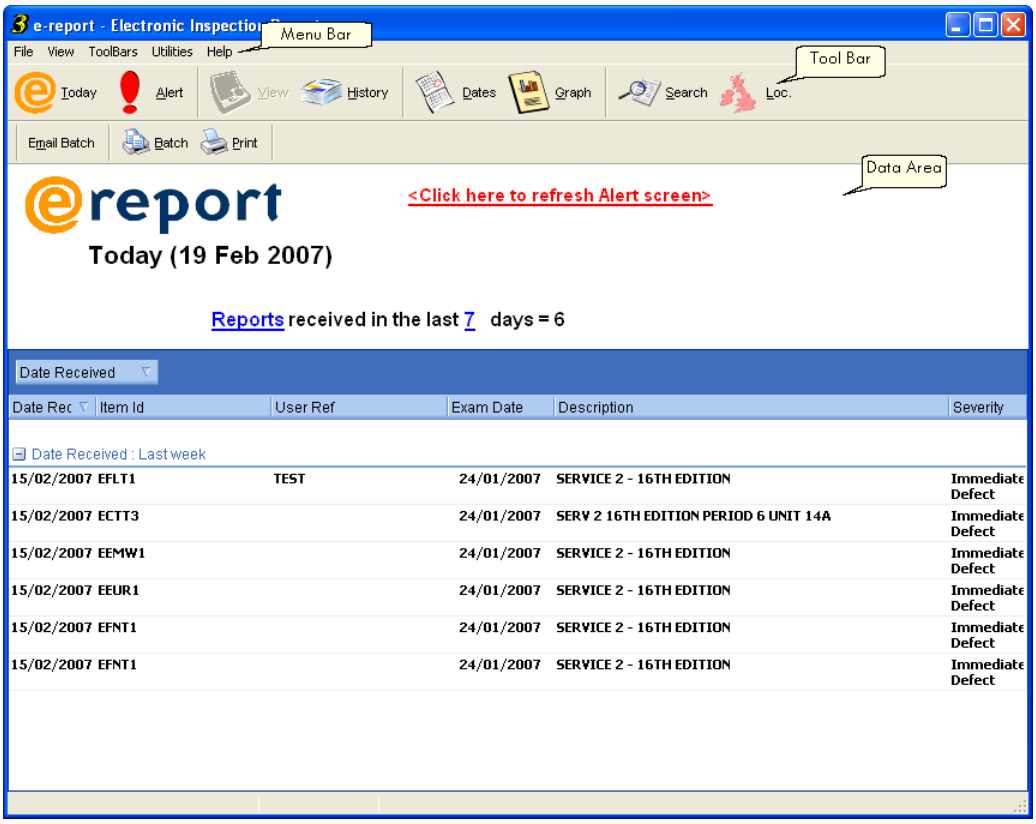
2.2 Exiting E-Report

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.

2.3 Screen Layout

All screens within E-Report share a similar format:

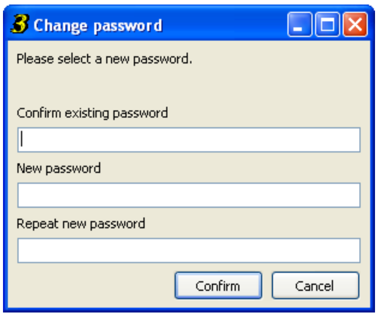


- Menu Bar - this consists of File, View, ToolBars, Utilities and Help menu options and remains static throughout E-Report.
- Tool Bar - the main navigational point within E-Report. Click on a Tool Bar option to move to that screen.
- Data Area - information requested from e-report is displayed in the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

2.4 Change Password

To change password from that initially supplied:

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

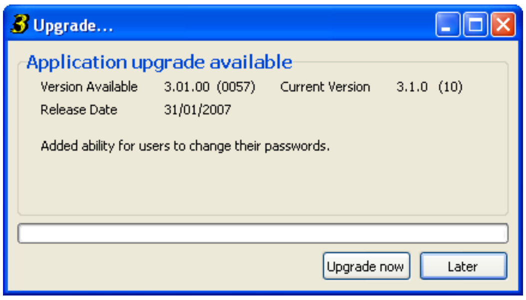


3. Type the current password into the 'Confirm Existing Password' field and input the new password into the other two fields.
4. Click **Confirm** to set the new password, or **Cancel** to abandon the changes and retain the original password.

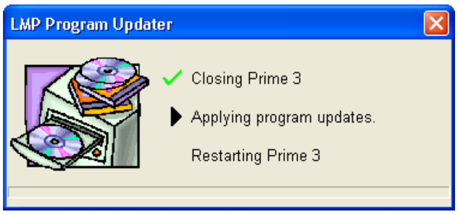
2.5 Automatic Upgrade

E-Report automatically detects when a new version of the software has been released and will prompt to install the new copy:

1. After logging in, if an upgrade is available, the "Upgrade" dialog box will open with details of the upgrade including the changes made to the system:



2. Click **Upgrade now** to install the upgrade, or **Later** to postpone the update.
3. As the upgrade is installed, the LMP Program Updater will open:



The upgrade will be installed and E-Report will close in order for the upgrade to take effect. E-Report will then re-start and return to the login screen.

2.6 Email options

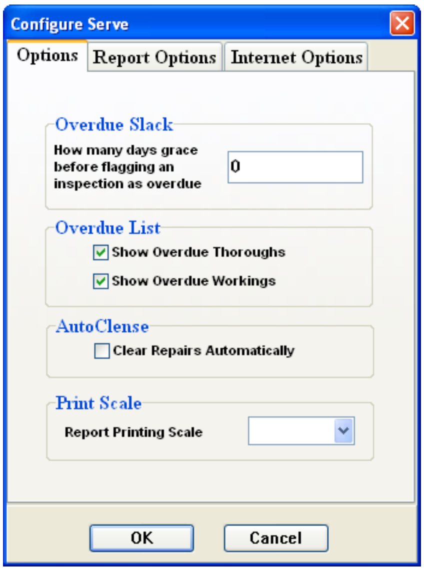
Two email settings are available - Send Email with Outlook and the format of emailed lists.

Send Email with Outlook

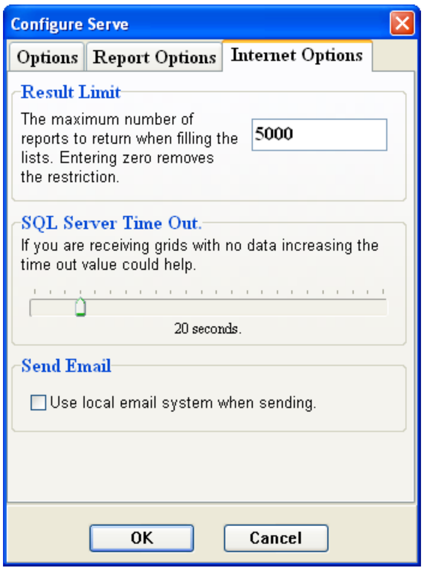
By default, email messages are sent using the in-built email package and originate from the LMP server. However, where Microsoft Outlook has been installed, it is preferable to enable Outlook as the standard email system in order that messages are sent (and are logged) on the local computer.

To use Outlook to send email:

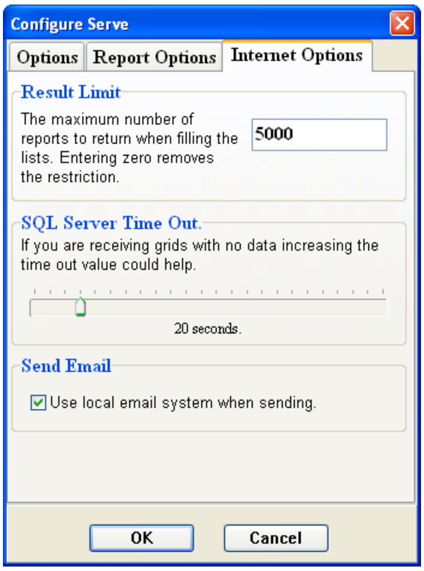
1. Select Utilities > Configure from the Menu Bar.
2. The "Configure Serve" dialog box will open on the **Options** tab:



3. Select the **Internet Options** tab:



4. Click into the "User local copy of Outlook to send emails." box in order to enable the option:

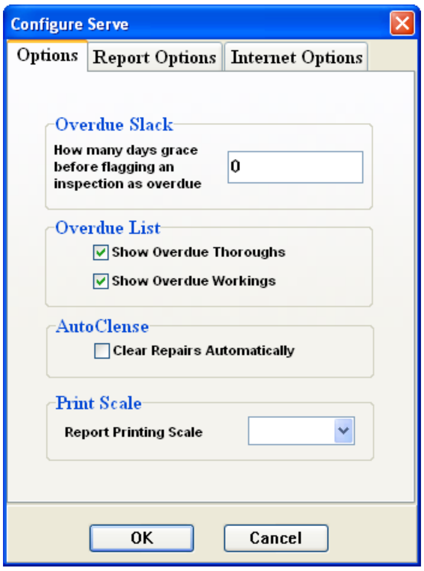


Format of emailed lists

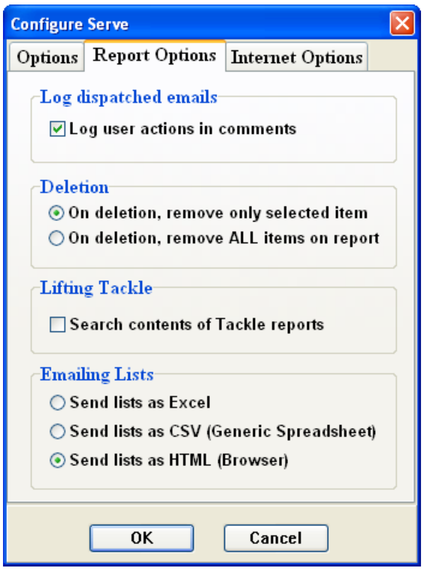
By default reports are emailed from E-Report as attachments in Excel format. This format allows data to be manipulated by the recipient, provided Excel is available on their computer. Other email format options are .html (browser based view) - which will present data in a format which can be viewed by any recipient but which cannot be manipulated - or .csv (a generic spreadsheet format).

To amend the format of emailed lists:

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



3. Select the **Report Options** tab:

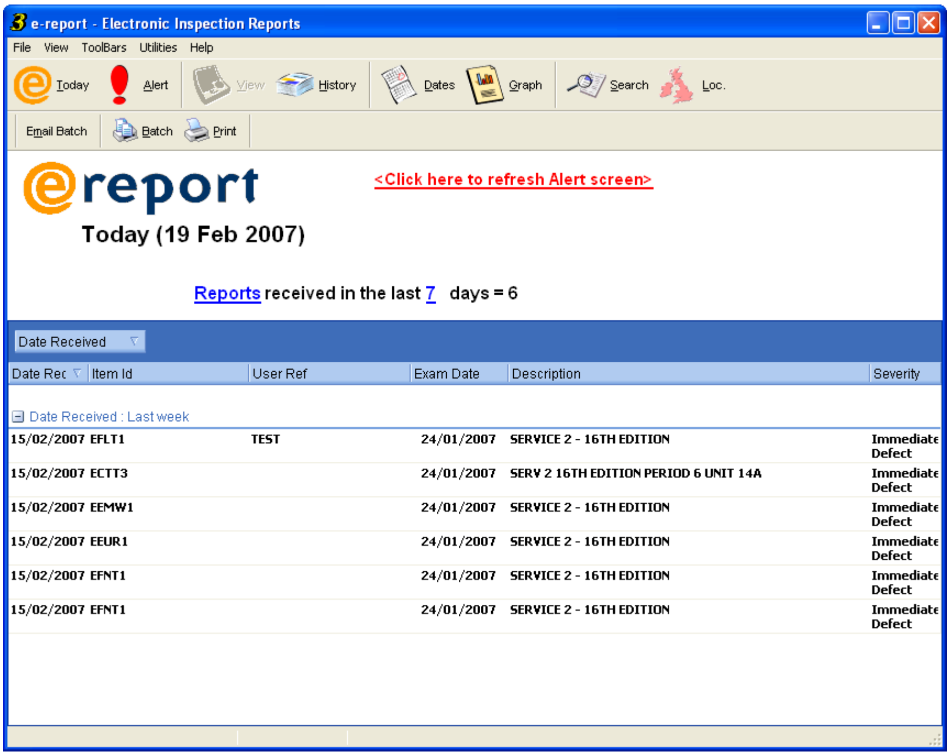


4. Click the button next to the format in which the attachments are to be sent and then click **OK** to apply the setting.

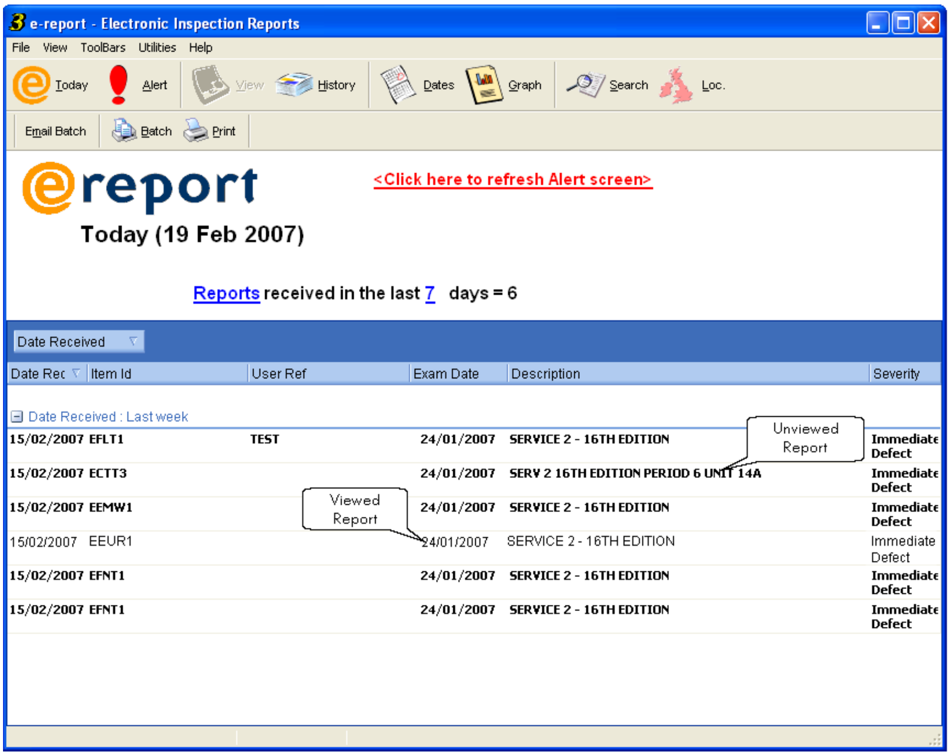
Part III

3 Today

On start-up, E-Report will open onto the "E-Report Today" page:

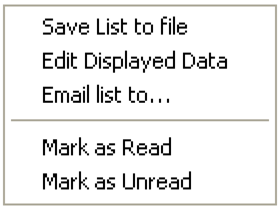


The Today page is E-Report's equivalent of an email Inbox. As reports are received, summary details are displayed on the Today screen. Reports that have not been viewed display in a bold font, easily differentiating them from those reports that have been viewed (normal font):



By default, the Today page displays a list of **reports** received within the last **7** 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 **7** and select the required option from the subsequent drop-down list.

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:

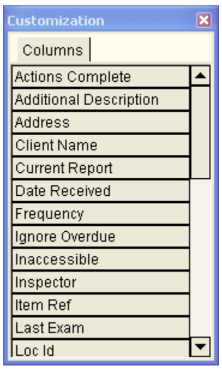
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select 

View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate. The report summary of the selected report(s) will then change to display as bold or normal font.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

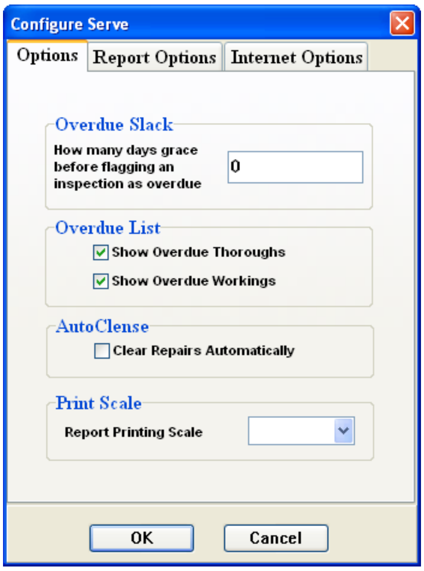
Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the  icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK**. The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the 

 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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

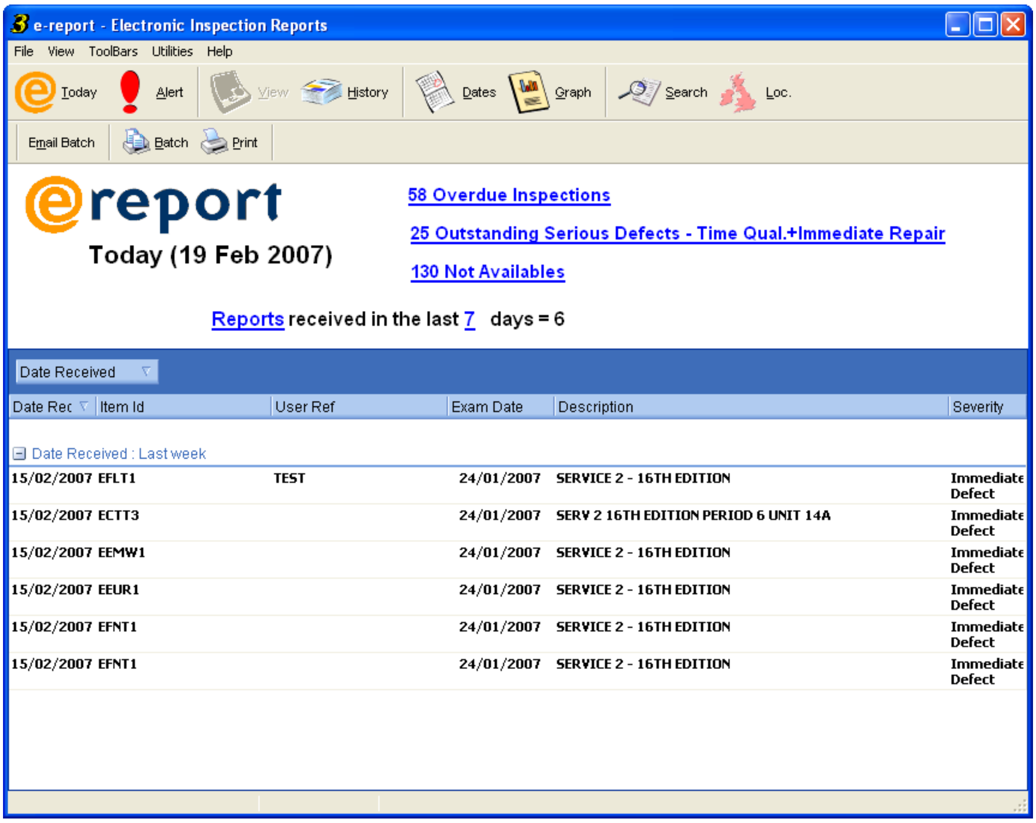
Printing report lists

To print the currently displayed report listing:

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

Alert details

Clicking on <Click here to refresh Alert screen> will display the Alert screen. If the Today page is re-selected, the view will alter:



The new links operate thus:

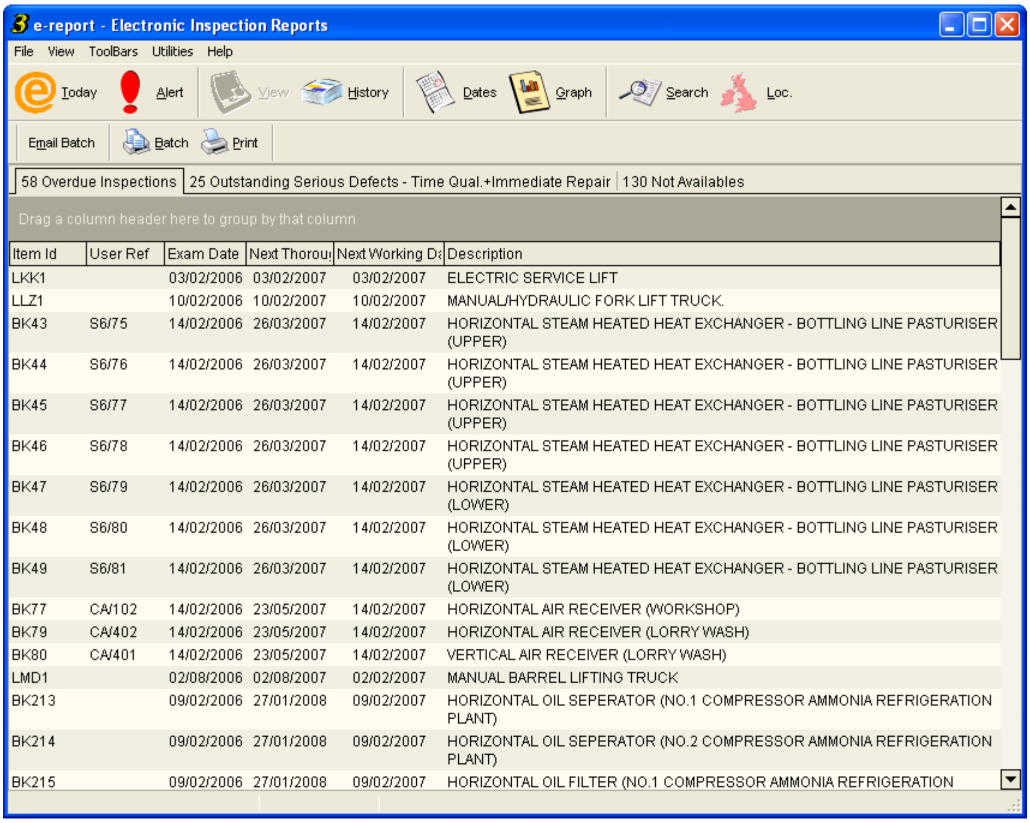
Action	On What	Result
Single click	Overdue Inspections	Switches to the Alert page and displays list of overdues
Single click	Outstanding Serious Defects	Switches to the Alert page and displays list of items with Outstanding Defects
Single click	Not Availables	Switches to the Alert page and displays list of Not Availables

Part IV

4 Alert (Report Overview)

The Alert screen is accessed either via the Alert icon or by selecting the option to <Click here to refresh Alert screen> on the "E-Report Today" page. It offers a quick overview, through the use of three tabs, of those inspections which:

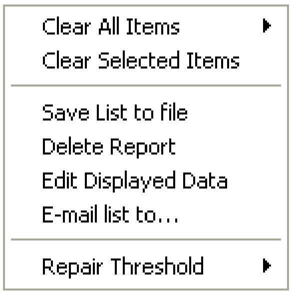
- have overdue reports listed against them and require a more recent inspection report (Overdue Inspections).
- require remedial action by the owner/user of the plant (Outstanding Repairs - Time Qual. + Immediate Repair).
- could not have an examination carried out (Not Availables).



By default, the Alert screen opens on the Overdue Inspections tab. However, each of the tabs presents information in the form of a report listing.

Report Listing

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



Clear All Items

Depending on the currently selected tab, clicking this option will clear all overdue inspections, items marked as not available or any defects. A **Confirm** option will open to ensure that items are not cleared in error.

Save List to file

To save the currently displayed report listing:

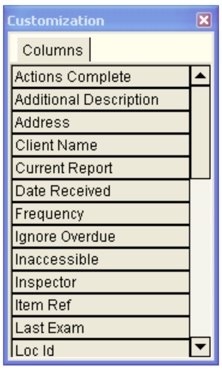
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

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 and time-qualified statutory repairs.
- All Repairs and Observations - as above with any comments.

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.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select  View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

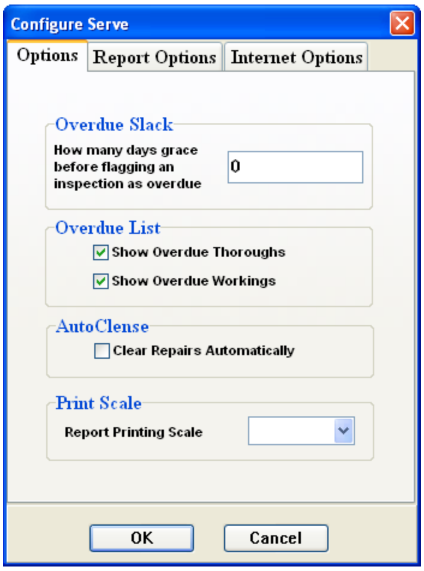
To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the 

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

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK**. The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the 

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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

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

4.1 Overdue Inspections

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 mothballed, its details may be removed from the Overdue Inspections or Not Availables tabs by amending the User Comments section of the last received report:

1. Double-click on the required item to view the last received report.
2. Scroll to the foot of the report and click into the "Remove from Overdue List" tick box.
3. Add any necessary detail in the User Comments field.
4. Click the 

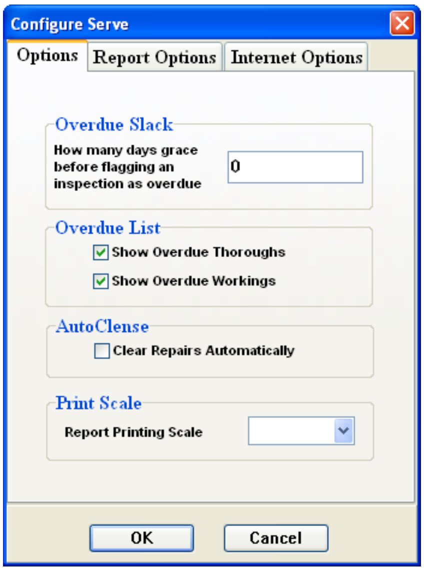
icon to return to the Alert screen. The Alert screen will automatically refresh to reflect any changes.

Overdue Slack period

It is possible to increase the number of days between the examination of an asset and the report for this examination being received (Overdue Slack period). By default, the Overdue Slack period is set to 0.

To increase the Overdue Slack:

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

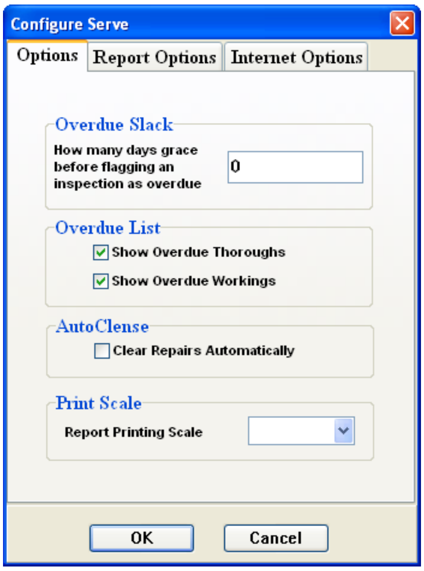


3. Click into the **Overdue Slack** box and input the required number of days grace.
4. Click **OK**. The "Configure Serve" dialog box will close and the Alert screen will automatically refresh to reflect any changes.

Overdue List

The reports displayed on the Overdue List may be altered to show all overdue inspections, overdue Thorough inspections or overdue Working inspections:

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



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

4.2 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 and time-qualified statutory repairs.
- All Repairs and Observations - as above with any comments.

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.

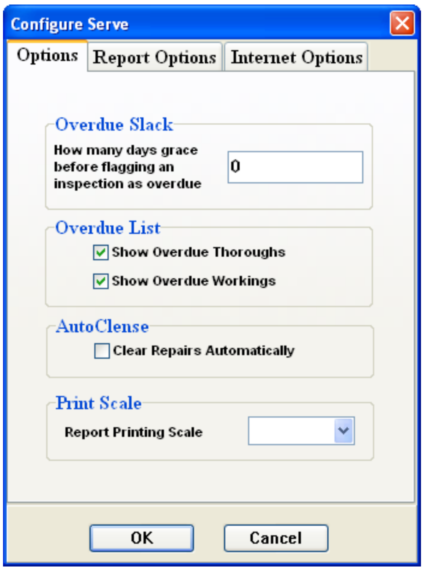
2. Scroll to the foot of the report and click into the "Remove Actions Reminder" tick box.
3. Select the appropriate category from the drop-down list in the User Status box if required.
4. Add any necessary detail in the User Comments field.
5. Click the 

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

AutoClense

By default, all outstanding repairs are displayed. This view may be amended to display only those repairs identified by the most recent report through the user of "AutoClense":

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



3. Click into the **AutoClense** tick box.
4. Click **OK**. The "Configure Serve" dialog box will close and the Alert screen will automatically refresh to remove any superseded repairs.

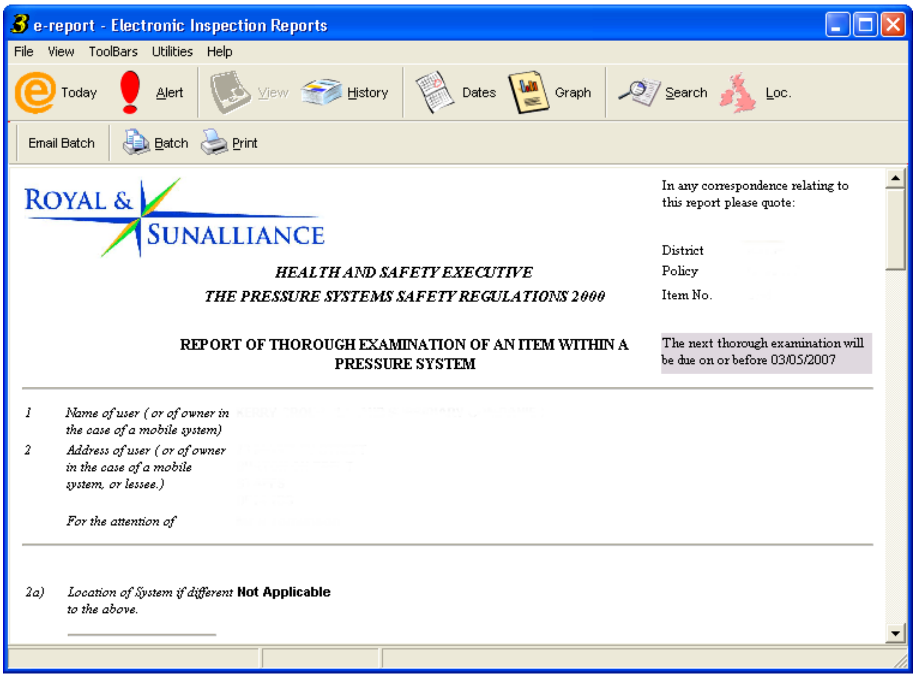
4.3 Not Available

Reports listed on the 'Not Available' tab are reports of non-inspection. Reasons for the non-inspection are detailed within individual reports. Double-click on the required report in order to view the details and reasons for non-inspection.

Part V

5 View

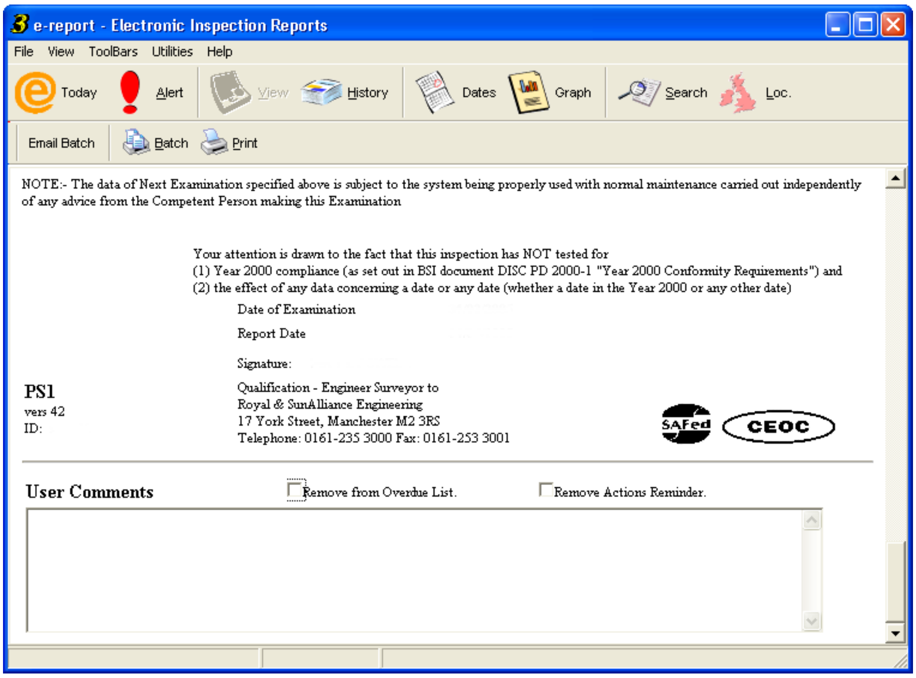
The View option displays the selected report on the screen in a similar format to the paper version:



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. 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 disenabled:



To record a comment:

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

Additionally, the following information will be automatically recorded in the User Comments section:

- If a report is emailed then the date and time the report was sent will be recorded.
- If any amendments are made to the User Actions or User Status sections of a report, the user details, date and time and action carried out will be recorded.

Copying information from a report

If required, information can be copied from a report for pasting into an alternate application (for example a report or spreadsheet):

1. Highlight the required text.
2. Right-click, and select **Copy** from the subsequent menu.
3. Open the destination application and paste the text into the required location.

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 then open offering a choice of printer.

If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Exporting Reports

Reports may be saved to a file or emailed from E-Report.

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**. The report will be sent as an attachment to the email.

To save a report:

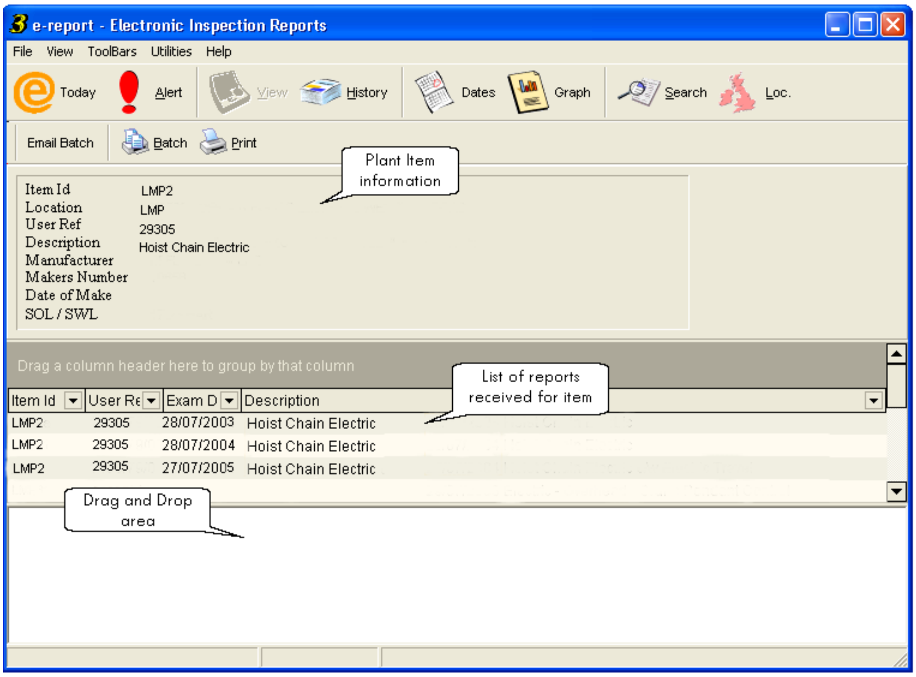
1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Part VI

6 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, an item of plant must first be selected - if no asset or report has been selected, clicking the  icon will have no effect.



Report List

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

- Save List to File
- Delete Report
- Edit Displayed Data
- E-mail list to...

Save List to file

To save the currently displayed report listing:

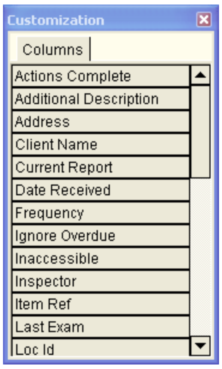
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select 

View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

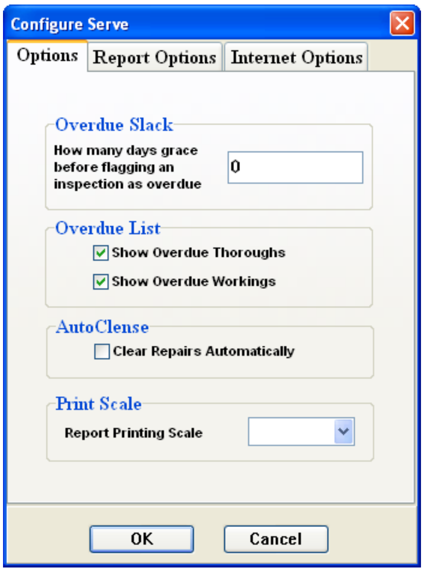
Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the  icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK**. The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the  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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

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

Attaching Documents

E-Report enables documents (for example, scanned images or Word documents) to be stored against an individual asset through "drag and drop". To attach a document:

1. Navigate to the location in which the required file is held.
2. Click on the required 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 key.
3. In the subsequent "Document Details" dialog box, select how 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 file 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 via E-Report.

4. Add a Document Description.
5. Click **OK** to save the document, or **Cancel** to abandon the file attachment.

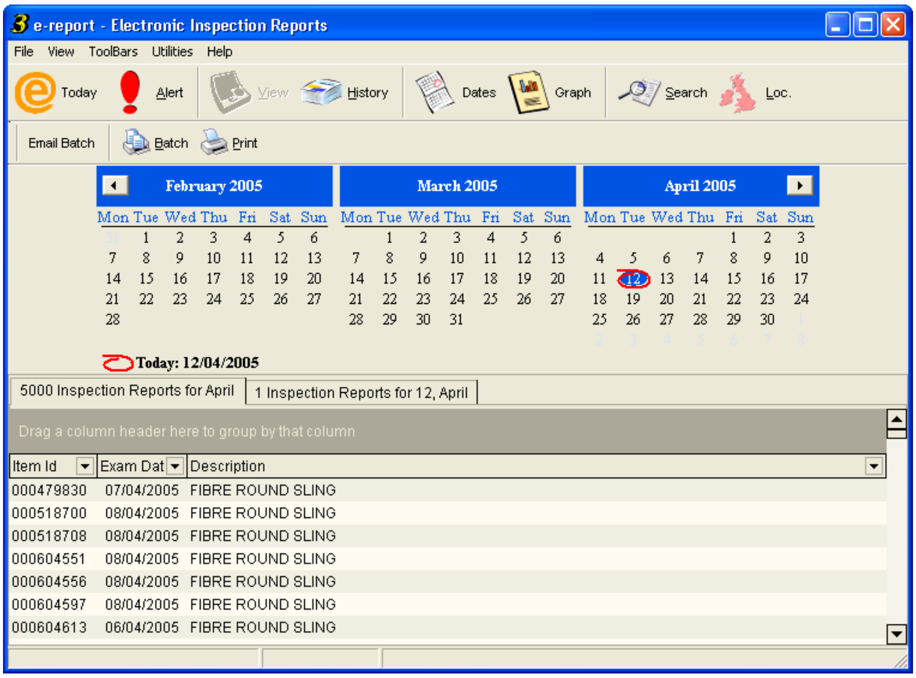
Part VII

7 Dates

The Dates screen provides details of which reports have been received on a particular month or day.

To access the Dates screen, select 

from the Menu Bar:



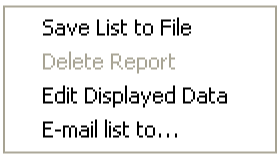
The top half of the screen is a calendar which defaults to today's date. The lower half of the screen has two tabs which display Inspection Reports received. By default, the first tab displays reports received in the current month, whilst the second tab displays reports received on the current day.

Changing the displayed dates:

- To change the **year** - click on the year in the heading above any of the month calendars. Up/Down arrows will display which can be clicked to move forwards or backwards by year.
- To change the **month** - click on the name of one of the months above the calendars. A drop-down list of month names will display. Click the required month to change the view.
- To change the **date** - click on any of the dates in the displayed calendars to update to the selected date.

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:

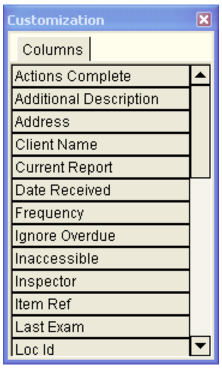
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select 

View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

Printing reports

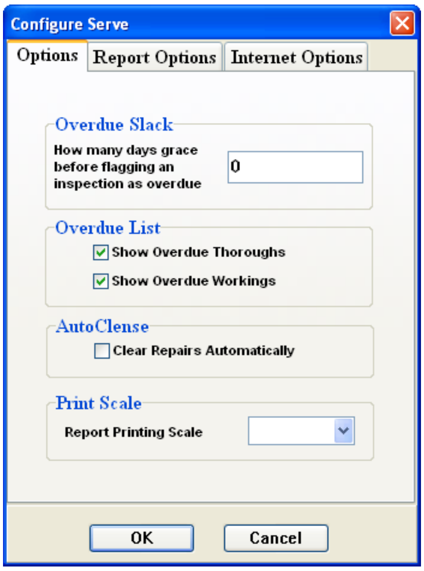
Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the  icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK.** The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the 

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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

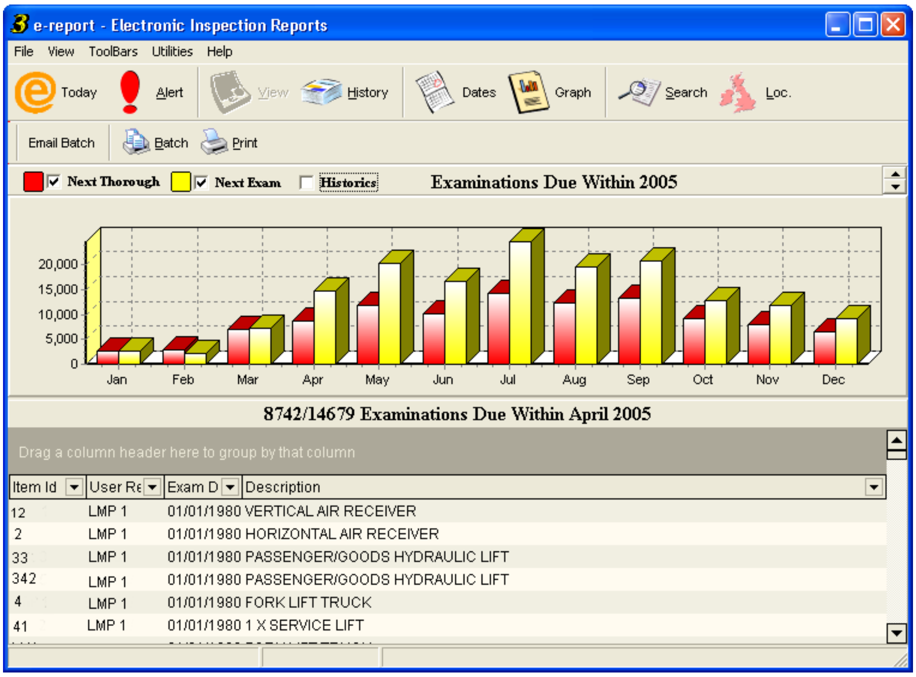
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

Part VIII

8 Graph

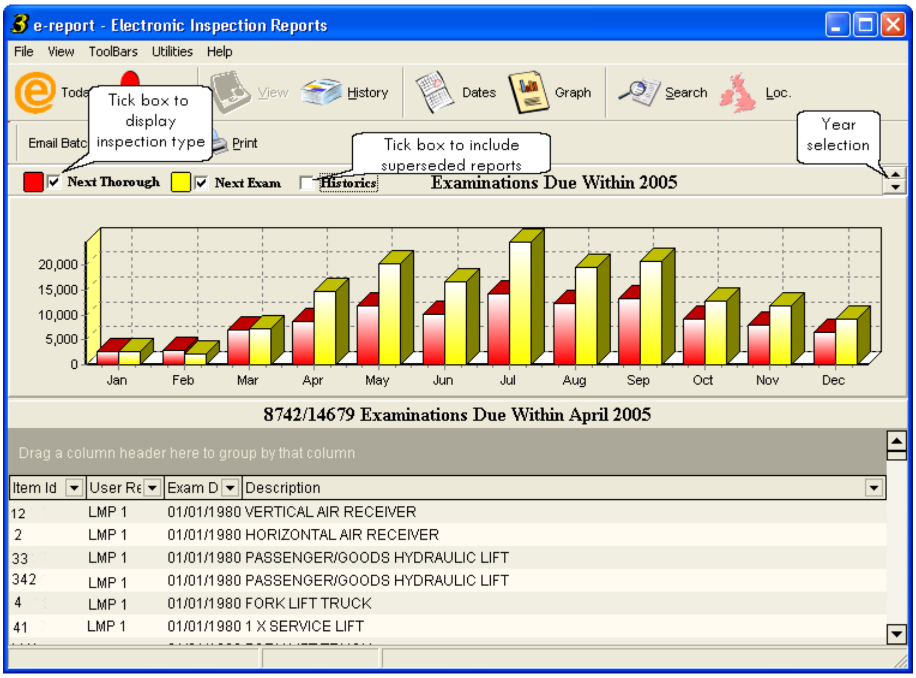
From information contained within previously issued reports, E-Report produces graphs to show when the next inspection for a particular item of plant is due. To access the graphing option, click 

on the Tool Bar. The graph screen will open, showing a graph of "Next Thorough" and "Next Exam" due within the current year and a report listing of "Next Thorough" and "Next Exam" due within the current month:



8.1 Working with Graph

The default options on the Graph screen may be altered to amend the information graphed and displayed:



Inspection Type and Superseded Reports

The "Next Thorough", "Next Exam" and "Historics" tick boxes may be ticked/unticked to alter the information presented by the graph. The "Next Thorough" and "Next Exam" tick boxes control which type of inspection to display, whilst the "Historics" box controls whether superseded reports are displayed. As the selection is amended, the Graph screen will automatically update to reflect the changes.

Time frame displayed

By default, the current year and month are displayed when Graph is first selected. To amend the year, click the Year selection arrows to increase or decrease the year as required. To change the reports displayed in the Report Listing area, click on one of the month bars of the graph to show the reports for that month.

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
Delete Report
Edit Displayed Data
E-mail list to...

Save List to file

To save the currently displayed report listing:

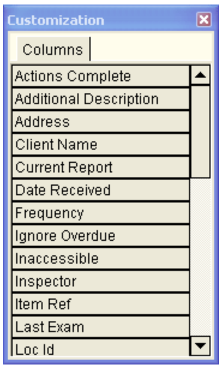
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select  View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

Printing reports

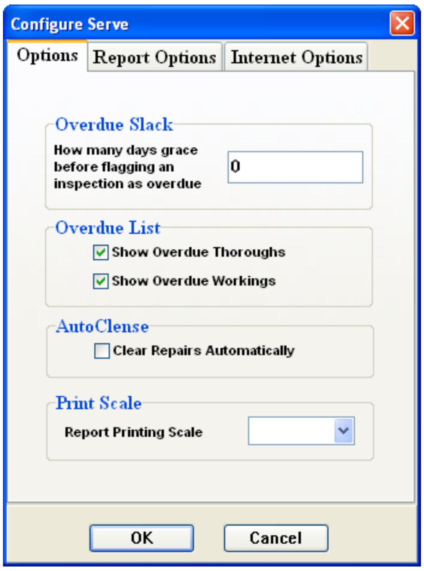
Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the Print icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK**. The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the  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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

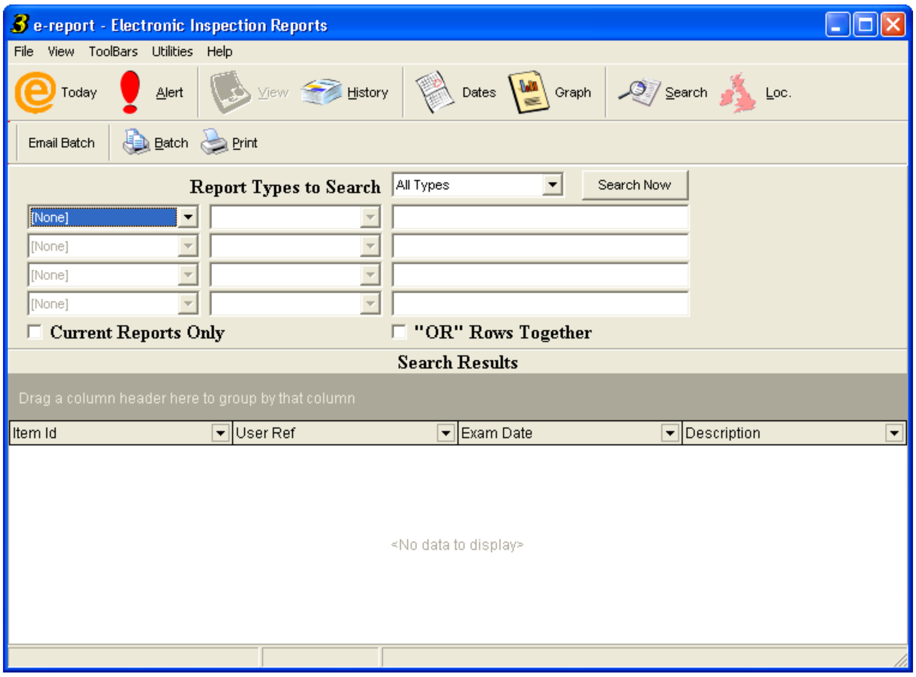
To print the currently displayed report listing:

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

Part IX

9 Search

Search enables the creation lists of reports that conform to user-designed criteria.



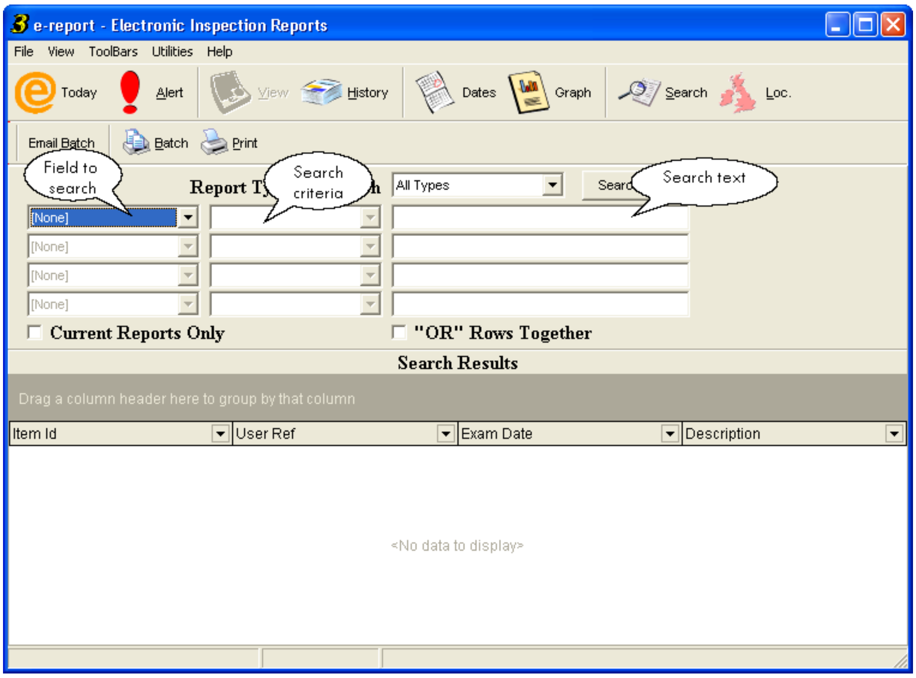
Building a search

1. Select  from the Tool Bar.
2. The Search screen will open as above.
3. Select 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

   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 search criteria to be applied to the search from the drop-down list in the middle box ("Search criteria" box).
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 as required (a maximum of four rows of search terms is available).

5. By default, all reports will be searched. To limit the search to the most recently received report, click into the "Current Reports Only" tick box.
6. Where more than one row of search criteria is constructed, by default the rows will be linked with an AND command. This will return results only for those records where all criteria are met. To link search criteria with an OR command (where results will be returned for records where any of the criteria are met), click into the "OR Rows Together" tick box.
7. Click "Search Now" to display the results of the search.

Searching Text Fields

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 "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 into the "Current Reports Only" text box.
6. Click "Search Now" to display the results of the search.

Searching Date Fields

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 all reports with an Exam date between 30 June 2004 and 31 January 2005:

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 "30/6/04" 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 "31/1/05" in the right-hand search box.
8. Click into the "Current Reports Only" text box.
9. Click "Search Now" to display the results of the search.

Searching for 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 severity:

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

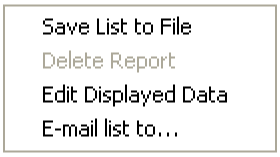
For example, to search for immediate repairs listed on current reports:

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. Click into the "Current Reports Only" text box.
6. Click "Search Now" to display the results of the search.

9.1 Working with Search Results

Search results form a Report List.

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:

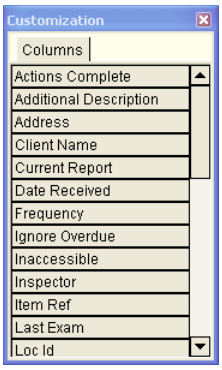
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select 

View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

Printing reports

Individual reports

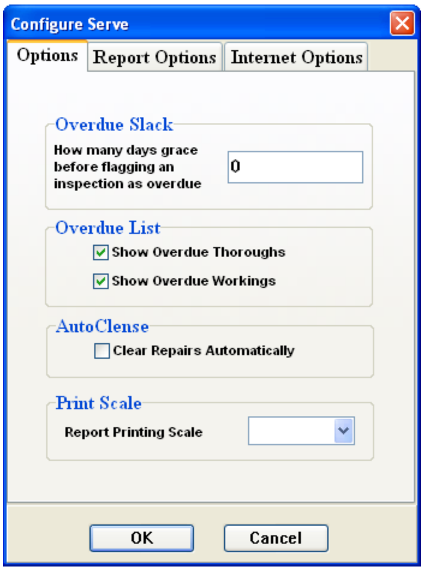
To print a copy of the report currently displayed:

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

2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK**. The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the  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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

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

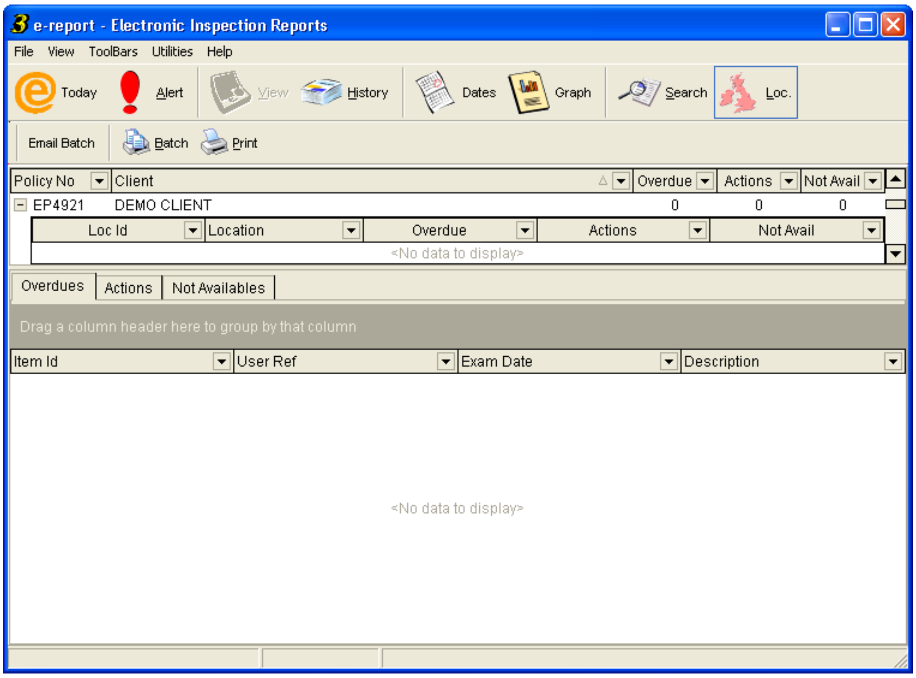
Part X

10 Location

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

To open the Location screen, select 

from the Tool Bar:

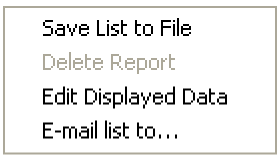


The Location screen is divided into two sections - the top section is a list of locations/companies divided up by policy number. Clicking on the + next to a location/company opens the individual locations for that policy number. The lower half of the screen offers three tabs (Overdue Items, Outstanding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

By default, the "Overdue Inspections" tab displays, with a count of the number of overdue inspections. It is necessary to click on the other two tabs to obtain a count of "Actions" or "Not Availables". 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:

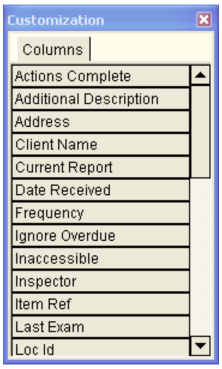
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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. Drag the field name to be removed away from its position. As soon as a cross appears on the field name, release the mouse key. The field will be removed from the screen and will instead be listed in the Customization box.
4. 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.

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 necessary message.
5. Click **Send Message**. The report listing will be sent as an attachment to the email.

View a selected report

To view a report displayed on the listing either:

- double-click on the required report, or
- click on the required report and select 

View from the Tool Bar.

Mark a report as read/unread

1. Select the required report or reports.
2. Right-click in the Data Area of the screen.
3. Select **Mark As Read** or **Mark As Unread** as appropriate.

Email the current/viewed 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**. The report 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 report 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.

Save the current/viewed 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 file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

Printing reports

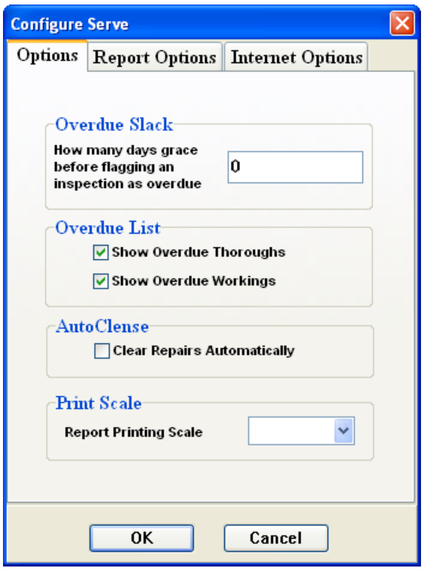
Individual reports

To print a copy of the report currently displayed:

1. Either:
   - Select File > Print from the Menu Bar, or
   - Click the  icon on the Tool Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

NOTE: If the selected report is too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point. Additionally, the print scale may be amended:

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



3. Click drop-down arrow in the **Report Printing Scale** box and select the required setting.
4. Click **OK**. The Configure Serve dialog box will close and the selected setting will be applied to all subsequently printed reports.

Multiple reports

To print a copy of 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 report of the group. (NOTE: Selected reports will be highlighted in blue).
2. Click the  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 click **OK** to print.

NOTE: If any of the selected reports are too large to fit on a single sheet of paper, a page break will automatically be inserted at an appropriate point.

Printing report lists

To print the currently displayed report listing:

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

Part XI

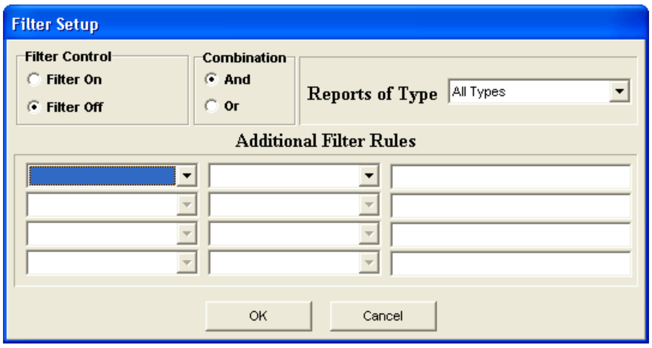
11 Advanced Features

11.1 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. In the "Filter Control" box, select **Filter On**.
4. If a restriction on the type of report is required, click the drop-down arrow in the "Reports of Type" box to select the type of report.
5. Apply "Additional Filter Rules" as required. (NOTE: The Additional Filter Rules are constructed in the same way as a Search. Please consult the Search section for more details).

11.2 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.
  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 whilst 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

If a filter has been applied to a Grouping, the filter must be cleared before the Grouping is removed. To do this:

1. Click the down arrow on the required field.
2. Select the "(All)" option from the subsequent listing.

Now remove the Grouping:

3. Right-click in the Grouping Area and select Edit Displayed Data from the subsequent menu.
4. Drag the required field name to the Customization box and release the mouse button. (NOTE: If the filter has not been removed before the grouping option is undone, then a filtered view of the data will continue to be presented).
5. Repeat steps 1-4 as required.
6. Close the Customization box (click the cross in the top right-hand corner) to refresh the view of the data. (NOTE: If Prime is exited before the refresh has taken place, the filter will be retained by Prime for future use).

Sorting Report Lists

Report Lists may be sorted either alphanumerically (the default setting) or reverse alphanumerically once a Grouping has been applied.

To apply a sort, click on the title of the field against which the sort is to be applied. The Report Listing will automatically refresh to reflect the sort.

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 a 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 Customization box to the required point on the screen 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.
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 the 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 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

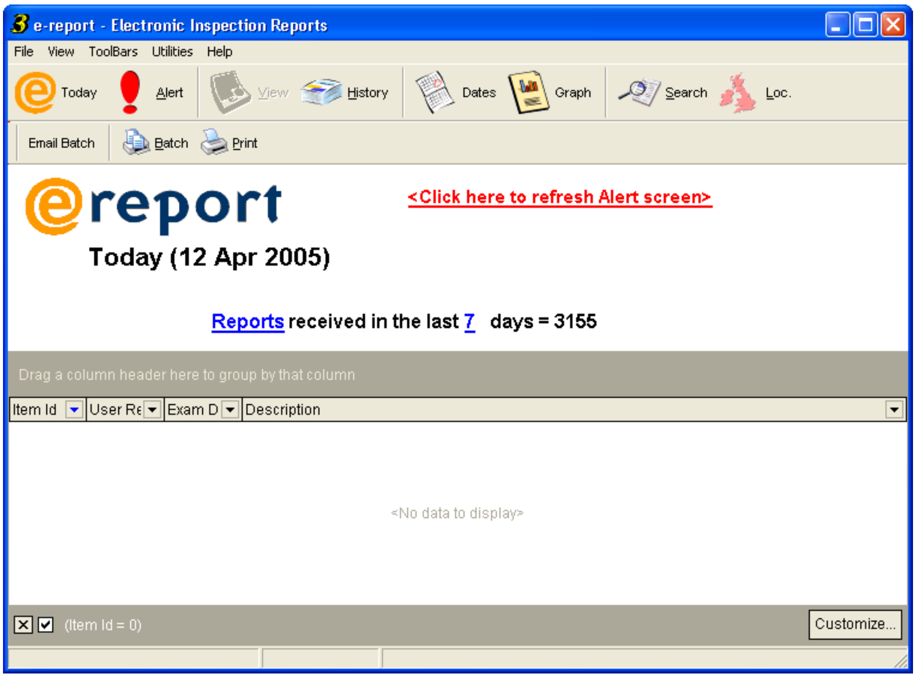
To remove a filter, either:

1. Click the down arrow on the required field.
2. Select the "(All)" option from the subsequent listing.

(NOTE: If filters have been applied to more than one field, repeat the above steps to remove the filters 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 when any filter is applied. The current filter will appear at the left-hand end of the Customize Bar.

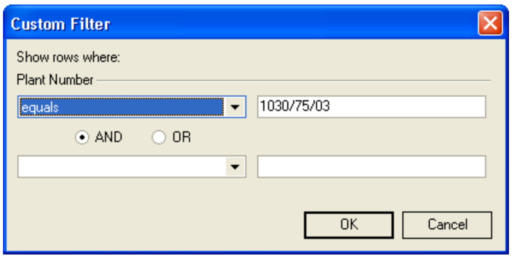
- To delete the current filter, click the "X". This will clear all filter criteria from the current view. Deleting the filter will also close the Customize Bar.
- To disenable the filter, click the tick. The filter can be re-applied by re-clicking the in the tick box.

Custom Filters

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

1. Click the down arrow on the heading to which the main filter is to be applied, and choose "(Custom…)".

2. A Custom Filter dialog box will open:



3. Complete the lines of the filter as required, and click **OK** to apply. The filter will remain in force until it is removed.

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