

E-Report

User Manual

2020

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

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Getting Started

Part

I

1 Getting Started

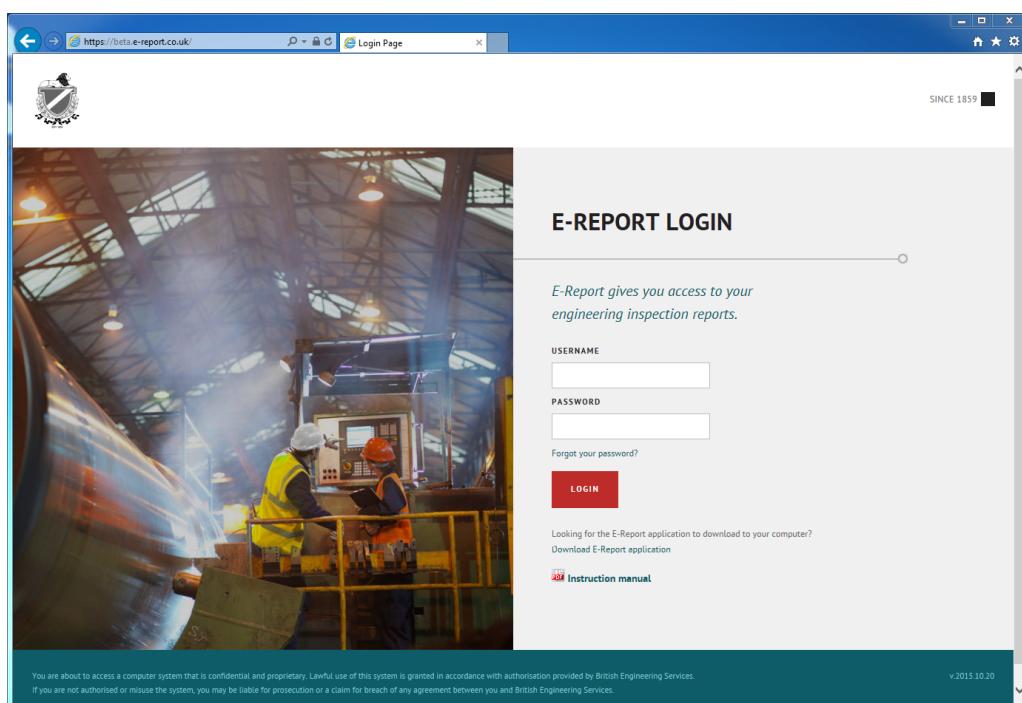
1.1 Logging On

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.

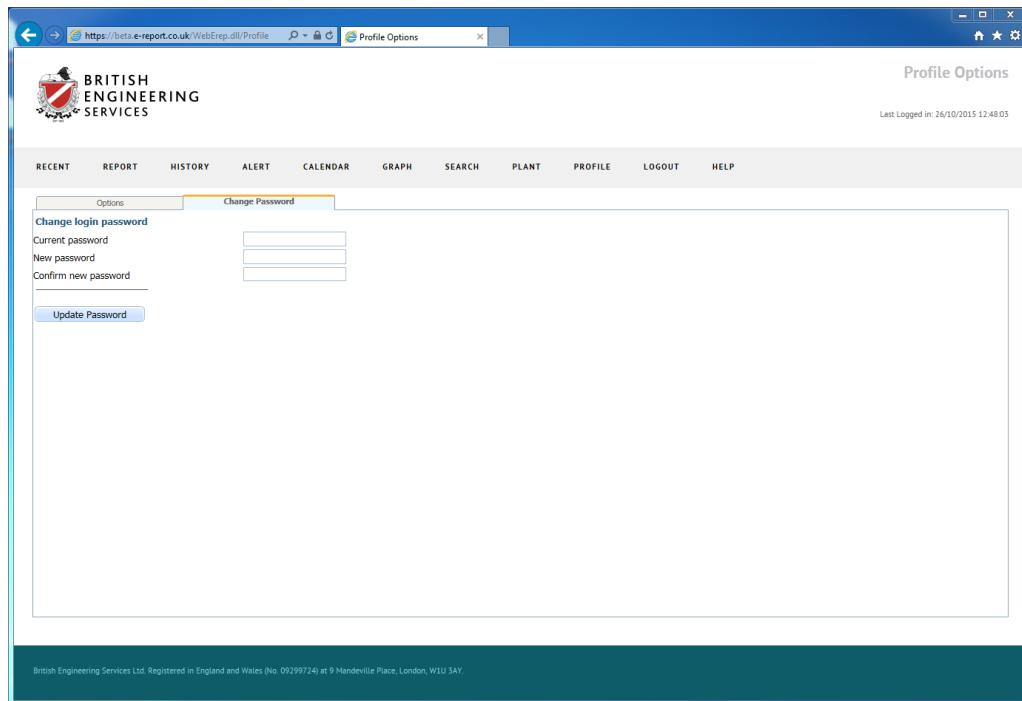
1.3 Help

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:

The screenshot shows a Windows application window titled 'Client Homepage'. At the top right, it says 'Recent Reports' and '2 Items Inspected in last 14 Days'. Below that, 'Last Logged in: 26/10/2015 12:49:03'. The menu bar includes RECENT, REPORT, HISTORY, ALERT, CALENDAR, GRAPH, SEARCH, PLANT, PROFILE, LOGOUT, HELP, and NEWS. The main area has a table with columns: RSA Id, Item Id, Received, User Ref, Form, Exam Date, Next Thor Exam, Description, and Severity. Two rows of data are visible:

RSA Id	Item Id	Received	User Ref	Form	Exam Date	Next Thor Exam	Description	Severity
33939884	BAP1	20/10/2015		PS3	20/10/2015		FIXED PIPE WORK FOR FIRE EXTINGUISHING SYSTEM	Clear
33880291	BAP2	16/10/2015		PS1 EPAD	28/09/2015	28/09/2016	COFFEE MACHINE - 2ND FLOOR RESTAURANT	Observation

At the bottom left, it says 'British Engineering Services Ltd. Registered in England and Wales (No. 09299724) at 9 Mandeville Place, London, W1U 3AY.'

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

The screenshot shows a Windows application window titled 'Report View'. At the top right, it says 'Last Logged in: 26/10/2015 12:49:03'. The menu bar includes RECENT, REPORT, HISTORY, ALERT, CALENDAR, GRAPH, SEARCH, PLANT, PROFILE, EMAIL, LOGOUT, and HELP. The main area has tabs: Report (selected) and User Comments. The report content includes:

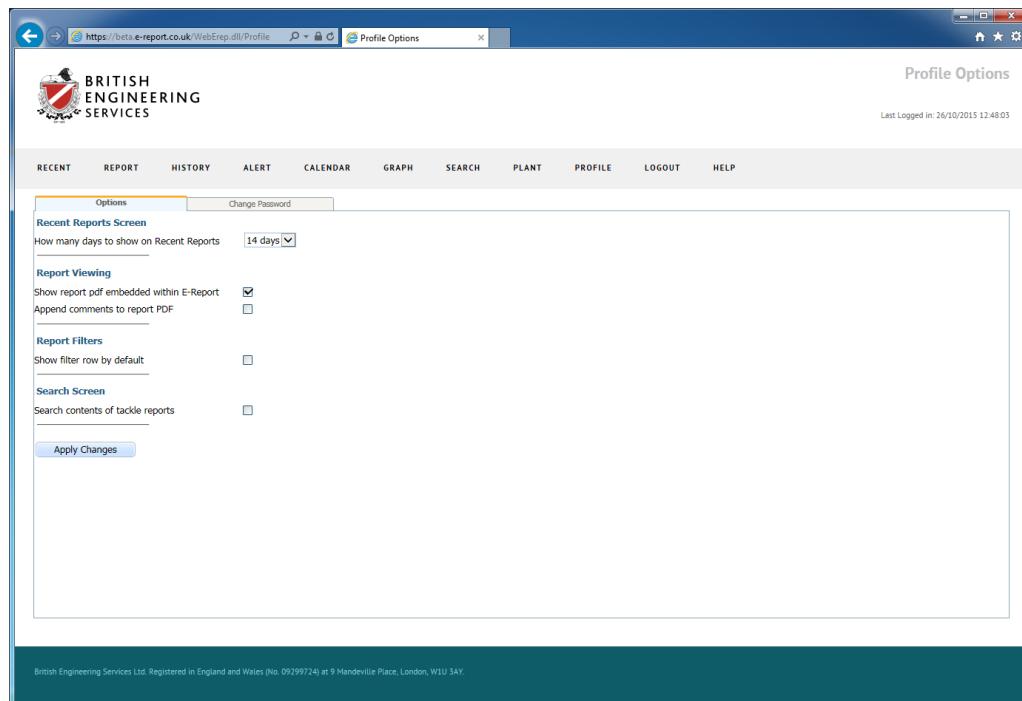
- BRITISH ENGINEERING SERVICES** logo
- HEALTH AND SAFETY EXECUTIVE** logo
- THE PRESSURE SYSTEMS SAFETY REGULATIONS 2000**
- REPORT OF IN SERVICE EXAMINATION OF ITEM(S)**
- WITHIN PRESSURE SYSTEM(S)**
- 1 Name of user (or of owner in the case of a mobile system or lessee) **RSA**
- 2 Address of user (or of owner in the case of a mobile system) **RSA PROPERTY SERVICES
2nd FLOOR BOWLING MILL
DEAN CLOUGH**
- In any correspondence relating to this report please quote:
District **B027**
Policy **EP13633**

At the bottom left, it says 'British Engineering Services Ltd. Registered in England and Wales (No. 09299724) at 9 Mandeville Place, London, W1U 3AY.'

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:

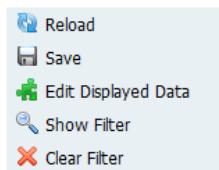


2. Choose the required number of days from the **Recent Reports Screen** drop-down box.
3. Click Apply Changes.

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.

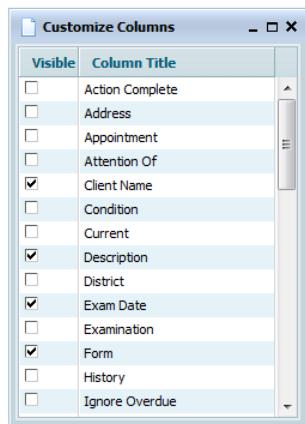
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

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

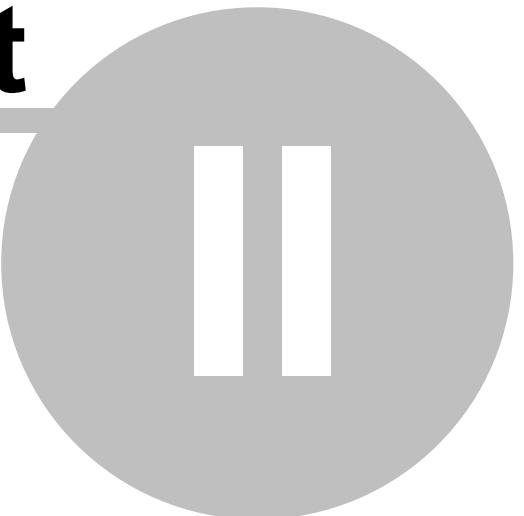
The Show Filter option allows the creation of a filter against the fields displayed on the current screen.

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



II

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:

The screenshot shows a web-based application window titled 'Report View'. At the top, there's a navigation bar with links for RECENT, REPORT, HISTORY, ALERT, CALENDAR, GRAPH, SEARCH, PLANT, PROFILE, EMAIL, LOGOUT, and HELP. The URL in the address bar is https://beta.e-report.co.uk/WebErep.dll/report2402. On the right side of the header, it says 'Report View' and 'Last Logged in: 26/10/2015 12:48:03'. Below the header is a toolbar with icons for Print, Copy, Undo, Redo, and other document operations. The main content area displays a report from 'BRITISH ENGINEERING SERVICES'. The report header includes the company logo (a lion rampant on a shield), the company name 'BRITISH ENGINEERING SERVICES' in bold capital letters, and the text 'ESTD 1919'. Below the header, it says 'HEALTH AND SAFETY EXECUTIVE' and 'THE PRESSURE SYSTEMS SAFETY REGULATIONS 2000'. The title of the report is 'REPORT OF IN SERVICE EXAMINATION OF ITEM(S) WITHIN PRESSURE SYSTEM(S)'. Underneath the title, there are two numbered items: '1 Name of user (or of owner in the case of a mobile system or lessee)' followed by 'RSA', and '2 Address of user (or of owner in the case of a mobile system)' followed by 'RSA PROPERTY SERVICES 2nd FLOOR BOWLING MILL DEAN CLOUGH'. At the bottom of the report area, there's a small note: 'British Engineering Services Ltd. Registered in England and Wales (No. 09299724) at 9 Mandeville Place, London, W1U 3AY.'

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

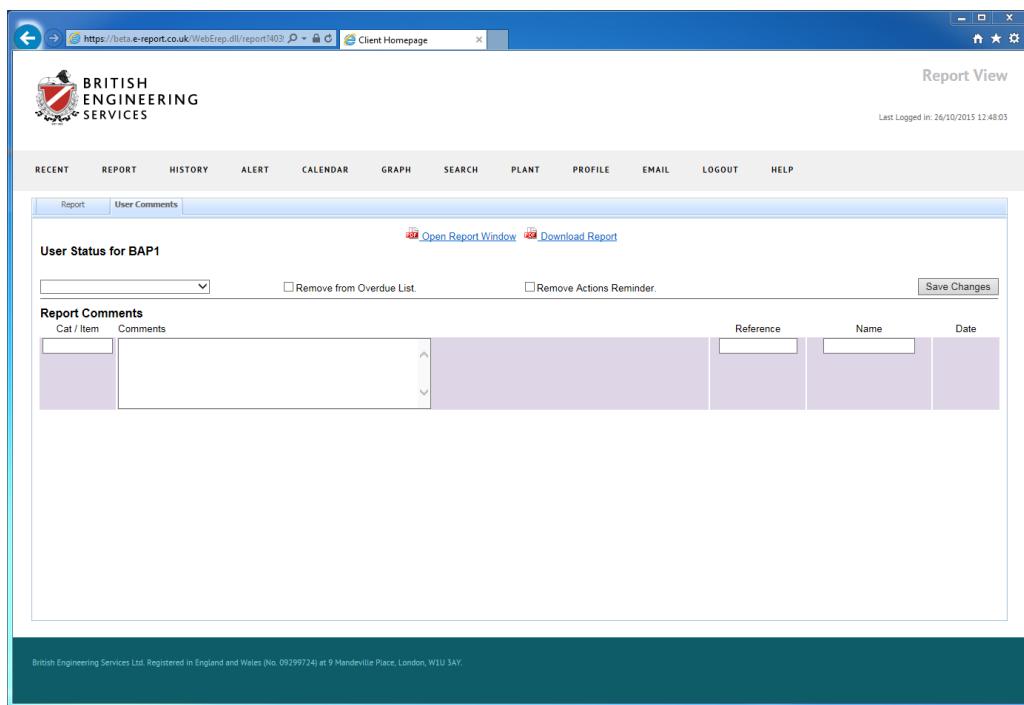
The Open Report Window option will force the report to display in a PDF viewer outside E-Report.

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:

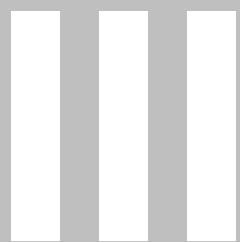
Field Name	Action	Result
User Status	Select from the drop-down list	The status selected will be stored against the current report.
Remove from Overdue List	Single click	Once selected, the current report will no longer appear on the "Overdue Inspection" list of the Alert screen.
Remove Actions Reminder	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



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 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)

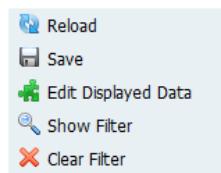
The screenshot shows the 'Alert View' interface with the following details:

- Header:** BRITISH ENGINEERING SERVICES
- Top Right:** Alert View, 8 Items Overdue; 0 Items with Actions; 36 Items Not Available, Last Logged in: 26/10/2015 12:48:03
- Menu Bar:** RECENT, REPORT, HISTORY, ALERT, CALENDAR, GRAPH, SEARCH, PLANT, PROFILE, LOGOUT, HELP
- Table Headers:** RSA Id, Item Id, Received, User Ref, Form, Exam Date, Next Thor Exam, Description, Severity
- Table Data:** A list of 8 items, each with a unique RSA ID, item ID, received date, user reference, form type, exam date, next thor exam date, description, and severity. The descriptions include various types of engineering equipment like pressure vessels, fire extinguishing systems, and lifts.
- Bottom:** British Engineering Services Ltd. Registered in England and Wales (No. 09299724) at 9 Mandeville Place, London, W1U 3AY

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:

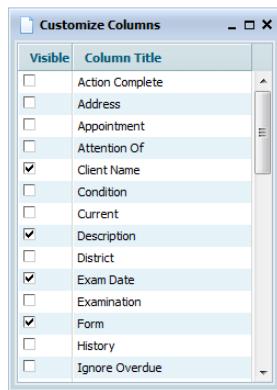
1. Right-click in the Data Area of the screen.
2. Select "Save" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

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.

History

Part

IV

4 History

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

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

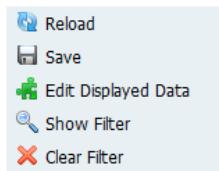
The screenshot shows a web-based application window titled "Item History". At the top, there's a navigation bar with links for RECENT, REPORT, HISTORY, ALERT, CALENDAR, GRAPH, SEARCH, PLANT, PROFILE, LOGOUT, and HELP. The main content area contains a table with the following data:

RSA Id	Item Id	Received	User Ref	Form	Exam Date	Next Thor Exam	Description	Severity
3339384	BAP1	20/10/2015		PS3	20/10/2015		FIXED PIPE WORK FOR FIRE EXTINGUISHING SYSTEM	Clear
32804033	BAP1	22/08/2014		PS3	14/08/2014		FIXED PIPE WORK FOR FIRE EXTINGUISHING SYSTEM	Clear
32804005	BAP1	22/08/2014		PRESS2	14/08/2014		FIXED PIPE WORK FOR FIRE EXTINGUISHING SYSTEM	Clear
32215753	BAP1	25/07/2013		PS3	22/07/2013		FIXED PIPE WORK FOR FIRE EXTINGUISHING SYSTEM	Clear
31713080	BAP1	09/09/2012		PRESS2	24/07/2012		FIXED PIPE WORK FOR FIRE EXTINGUISHING SYSTEM	Clear

Below the table, there's a section titled "Attached Documents" which currently has an empty list. At the bottom of the screen, there's a footer bar with a "Document to upload:" input field, a "Browse..." button, and an "Upload" button.

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:

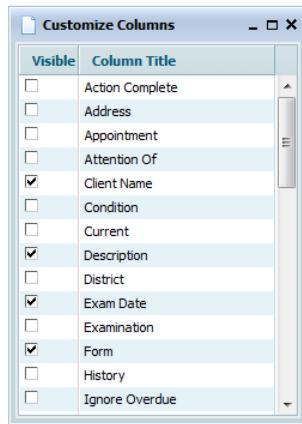
1. Right-click in the Data Area of the screen.
2. Select "Save" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

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.

Calendar

Part

V

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:

Selected Dates

Year: All Month: All

Show Reports

RSA Id	Item Id	Received	User Ref	Form	Exam Date	Next Thor Exam	Description	Severity

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

Inspection Reports - 363

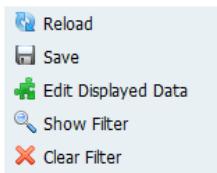
RSA Id	Item Id	Received	User Ref	Form	Exam Date	Next Thor Exam	Description	Severity
33004818	LAB37	14/01/2015	59391	L6	13/01/2015	16/08/2013	IKG2AR RESCUE/RECOVERY HARNESS	Not Avail
33004818	LAB36	14/01/2015	59392	L6	13/01/2015	16/08/2013	IKG2AR RESCUE/RECOVERY HARNESS	Not Avail
33004818	LAB34	14/01/2015	55063	L6	13/01/2015	09/01/2014	ANCHOR STRAP	Not Avail
33004818	LAB32	14/01/2015	55070	L6	13/01/2015	13/07/2015	ANCHOR STRAP1	Clear
33004818	LAB31	14/01/2015	55074	L6	13/01/2015	13/07/2015	ANCHOR STRAP - OCTOBER 2011	Clear
33004818	LAB39	14/01/2015	60625	L6	13/01/2015	16/08/2013	TWIN NRG LANYARD	Not Avail
33004818	LAB40	14/01/2015	51713	L6	13/01/2015	16/02/2014	TWIN NRG LANYARD	Not Avail
33004818	LAB45	14/01/2015	L6	13/01/2015	13/07/2015	SAFETY HARNESS	Clear	
33004818	LAB49	14/01/2015	L6	13/01/2015	18/12/2013	FALL ARRESTOR	Not Avail	
33004818	LAB51	14/01/2015	L6	13/01/2015	13/07/2015	FALL ARRESTOR	Clear	
33004818	LAB54	14/01/2015	L6	13/01/2015	13/07/2015	TWIN TAILED LANYARD	Clear	
33004818	LAB57	14/01/2015	L6	13/01/2015	13/07/2015	HARNESS	Clear	
33004818	LAB58	14/01/2015	L6	13/01/2015	13/07/2015	HARNESS	Clear	
33004818	LAB61	14/01/2015	L6	13/01/2015	09/01/2015	SAFETY HARNESS - STEED MARCH (2008)	Not Avail	
33004818	LAB62	14/01/2015	L6	13/01/2015	09/01/2015	TWIN LANYARD INC FALL ARREST - STEED MARCH (2011)	Not Avail	

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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:

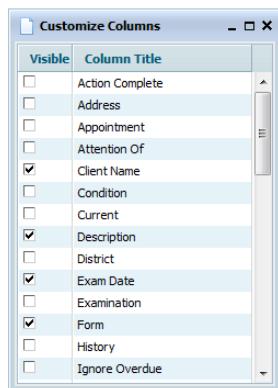
1. Right-click in the Data Area of the screen.
2. Select "Save" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

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.

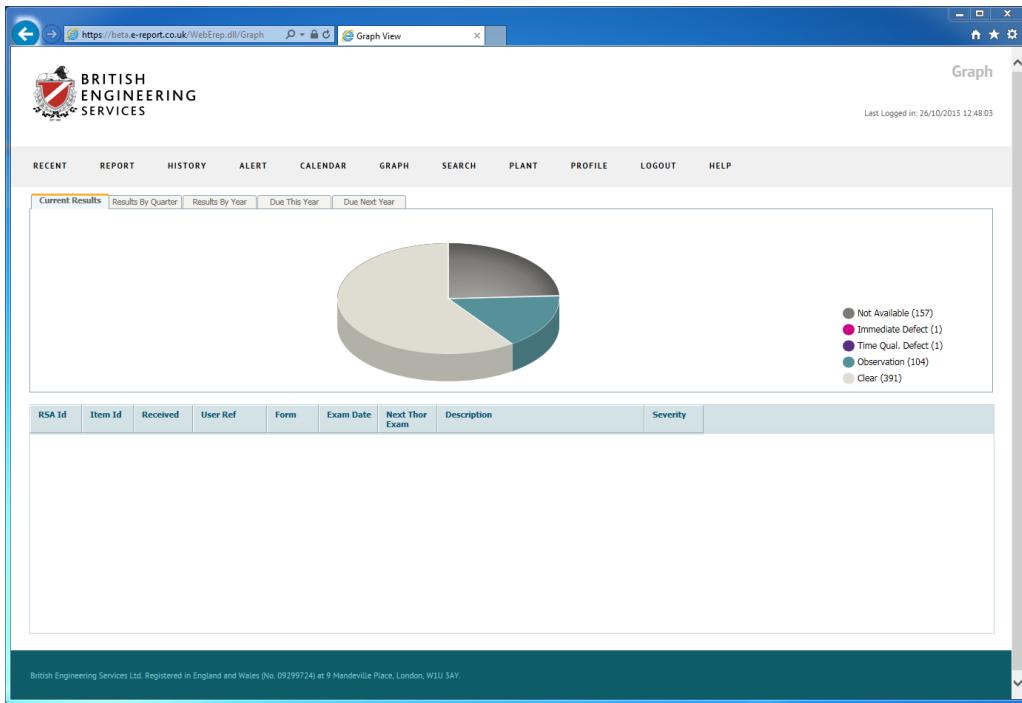
Graph

Part

VI

6 Graph

Graphical management information is presented on the Graph screen.



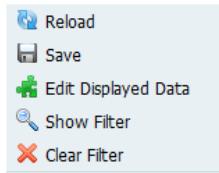
Five tabs are available:

- 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:

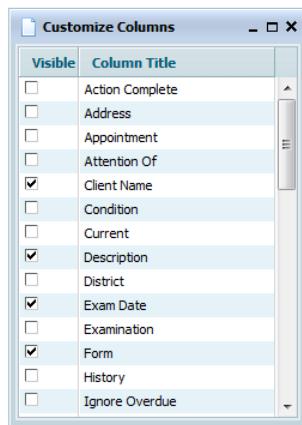
1. Right-click in the Data Area of the screen.
2. Select "Save" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

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.

Search

Part

VII

7 Search

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

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

Building a search

1. 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 Available
 - 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 the |
| • Is after the | • Is not the |
| • Is on or before the | |
| • Is on or after 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 - indicating a serious defect that could give rise to immediate/imminent danger.
- 3 Time qualified repairs - a serious defect that could give rise to danger and requires attention within a specified time.
- 2 Observations - a minor defect or issue that requires attention by the user/owner.
- 1 Clear - no defect or issue noted.

Criteria available on the Severity field are:

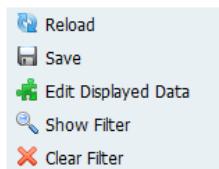
- Is less than
- Is greater than
- Is exactly
- Is not

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:

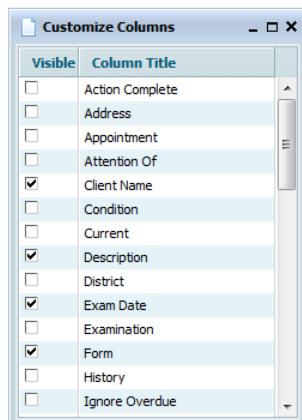
1. Right-click in the Data Area of the screen.
2. Select "Save" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

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.

Plant

Part

VIII

8 Plant

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

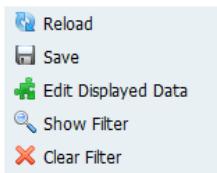
Policy	Loc Id	Client Name	Address
EPI13633	18	RSA	MORE THAN BUILDING 2 GRAYLING COURT DOXFORD INT BUSINESS PARK SUNDERLAND TYNE & WEAR SR3 3XA
EPI13633	25	RSA	HOR 990 ST MARKS COURT CHART WAY HORSHAM WEST SUSSEX RH12 1XL
EPI13633	46	RSA	SAL181 NON DESTRUCTIVE TESTING LAB 3/8 ARCH NORTON STREET SALFORD M3 7NW
EPI13633	49	RSA	RSA 17 YORK STREET MANCHESTER M2 3GR
EPI13633	51	RSA	RSA PARKVIEW HOUSE VICTORIA ROAD SOUTH CHELMSFORD ESSEX CM1 1NG
EPI13633	53	RSA	RSA PROPERTY SERVICES 2nd FLOOR BOWLING MILL DEAN CLOUGH HALIFAX WEST YORKSHIRE HX3 5WA
EPI13633	54	RSA	RSA NEW HALL PLACE OLD HALL STREET LIVERPOOL L3 3EN
EPI13633	2493955	RSA	RSA ALEXANDER BAIN HOUSE 15 YORK STREET GLASGOW G2 8LA

The Locations tab provides a list of locations/companies divided up by policy number and Location ID. Double-click 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:

RSA Id	Item Id	Received	User Ref	Form	Exam Date	Next Thor Exam	Description	Severity
32604556	B510	08/04/2014	STH.BLR.RM	PS1 EPAD	02/04/2014	02/04/2018	HEATING PRESSURISATION VESSEL NO1	Clear
33215340	B512	12/06/2015	STH.BLR.RM	B103	11/06/2015		AIR HEATING BATTERY	Clear
33215355	B513	12/06/2015	NTH.BLR.RM	B1061	11/06/2015		NO.4 HEATING AND INDIRECT SUPPLY BOILER AND PUMP	Clear
33215359	B514	12/06/2015	NTH.BLR.RM	B1062	11/06/2015		NO.5 HEATING AND INDIRECT SUPPLY BOILER	Clear
33215255	B515	12/06/2015	NTH.BLR.RM	B1063	11/06/2015		NO.6 HEATING AND INDIRECT SUPPLY BOILER	Clear
32604732	B516	08/04/2014	NTH.BLR.RM	PS1 EPAD	02/04/2014	02/04/2018	HEATING PRESSURISATION VESSEL NO1	Clear
33215340	B518	12/06/2015	NTH.BLR.RM	B23	11/06/2015		AIR HEATING BATTERY	Clear
33215352	B520	12/06/2015	NTH.CORE 5	B1063	11/06/2015		HOT WATER SUPPLY CALORIFIER	Clear
33215301	B521	12/06/2015	NTH.CORE 5	B23	11/06/2015	26/04/2016	COLD WATER TANK	Clear
32604390	B522	08/04/2014	NTH.CORE 5	B23	02/04/2014	02/04/2018	RUNAROUND COIL PUMP PRESSURISATION VESSEL ON AIR HEATING UNIT NO.11	Clear
32604797	B523	08/04/2014	NTH.CORE 5	PS1 EPAD	02/04/2014	02/04/2018	CHILLED WATER PRESSURISATION VESSEL NO.1	Clear
33215432	B524	12/06/2015	STH.CORE 4	B1061	11/06/2015		HOT WATER SUPPLY CALORIFIER	Clear
33215301	B525	12/06/2015	STH.CORE 4	B23	11/06/2015	26/04/2016	COLD WATER TANK	Clear
32604398	B526	08/04/2014	STH.CORE 4	B13	02/04/2014	02/04/2018	RUNAROUND COIL PUMP PRESSURISATION VESSEL ON AIR HEATING UNIT NO.10	Clear
32604415	B527	08/04/2014	STH.CORE 4	B23	02/04/2014		GALLERIA CHILLED WATER PRESSURISATION VESSEL	Observation
33215432	B528	12/06/2015	STH.CORE 1	B1063	11/06/2015		HOT WATER SUPPLY CALORIFIER	Clear
33215301	B529	12/06/2015	STH CORE 1	B23	11/06/2015	26/04/2016	COLD WATER TANK	Clear
32604396	B530	08/04/2014	STH.CORE 1	B13	02/04/2014	02/04/2018	RUNAROUND COIL PUMP PRESSURISATION VESSEL ON AIR HANDLING UNIT NO.9	Clear
33215450	B531	12/06/2015	GALLERIA	B1063	11/06/2015		UNDERFLOOR/WALL HEATING AND COOLING HEAT EXCHANGERS	Observation
33215450	B533	12/06/2015	GALLERIA	B1063	11/06/2015		CEILING HEATING AND COOLING HEAT EXCHANGERS	Clear
32604406	B534	08/04/2014	GALLERIA	B13	02/04/2014		CEILING HEATING AND COOLING PRESSURISATION VESSEL	Observation
32604418	B535	08/04/2014	BASEMENT	B13	02/04/2014	02/04/2018	BASEMENT TANK ROOM- COLD WATER BOOSTER UNIT	Clear
33215301	B536	12/06/2015	BASEMENT	B23	11/06/2015	26/04/2016	COLD WATER TANK	Clear

Report Listing

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Save

To save the currently displayed report listing:

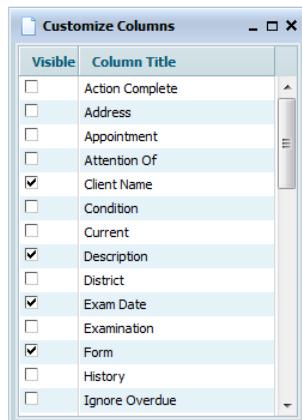
1. Right-click in the Data Area of the screen.
2. Select "Save" from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a file name.
4. Click **Save**.

Edit Displayed Data

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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.

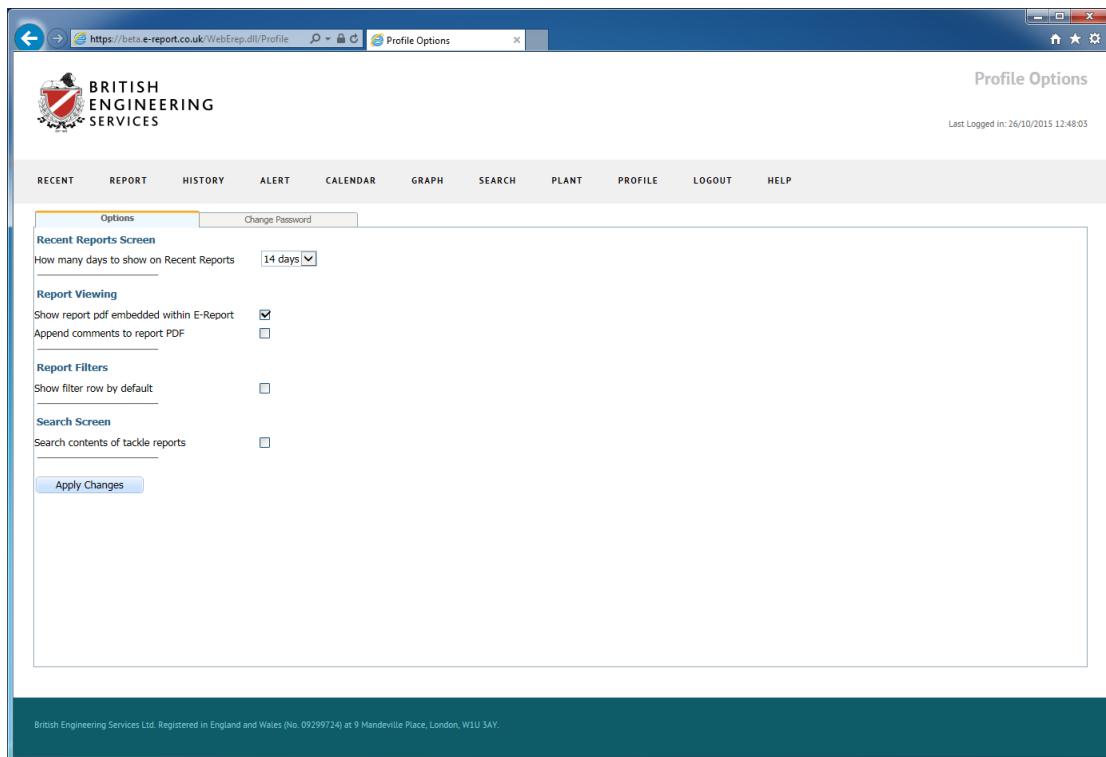
Profile

Part

IX

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:

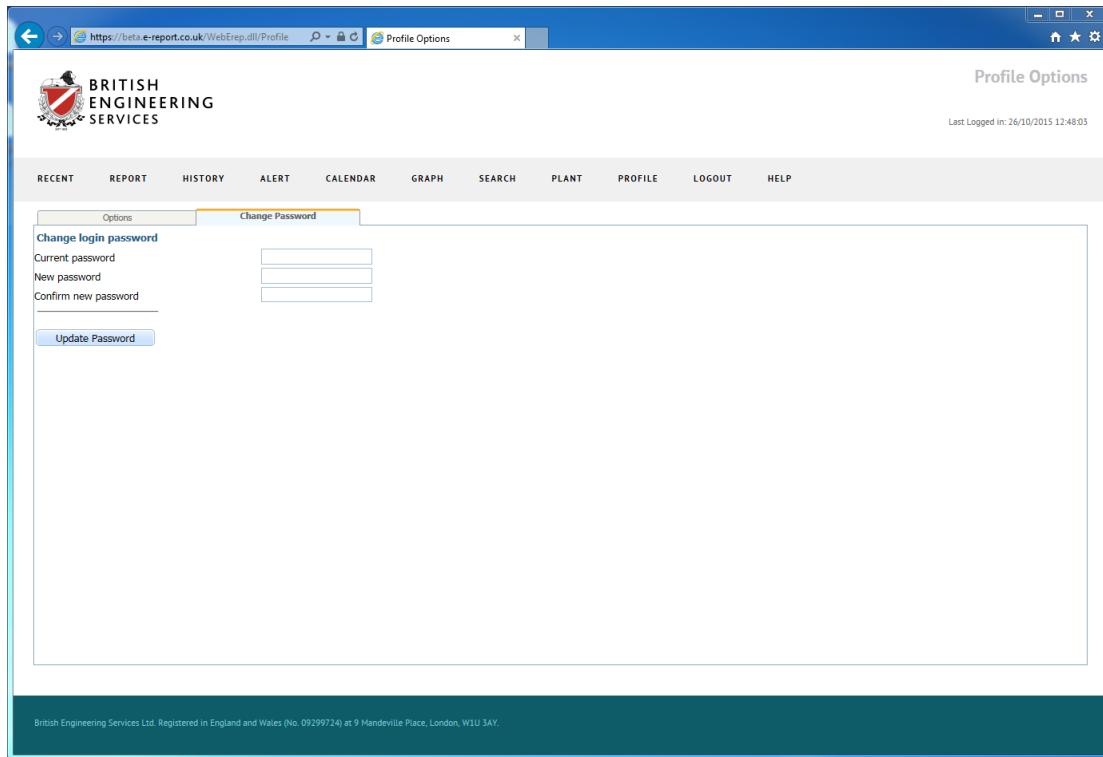
Recent Reports Screen - select the required number of days history to display on the Report screen.

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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