SGS Report

User Manual

© 2007 LMP

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

The text of this manual is subject to change without notice. The current version of the manual is available from the SGS Report website: www.sgsreport.co.uk

© 2007 LMP

Table of Contents

Part I Introducing Electronic Reporting 5

Part II Getting Started 8

1 Logging On ... 8
2 Exiting SGS Report ... 8
3 Screen Layout ... 9
4 Email options ... 9
5 Report Lists ... 11
  Working with Report Lists ... 11

Part III Today 16

Part IV Alert (Report Overview) 22

1 Overdue Inspections ... 25
2 Repairs ... 26
3 Not Available ... 27

Part V View 30

Part VI History 34

Part VII Dates 40

Part VIII Graph 46

1 Working with Graph ... 47

Part IX Search 52

1 Working with Search Results ... 55

Part X Location 60

Part XI Advanced Features 66

1 Setup Filter ... 66
2 Grouping, Sorting and Filtering Report Lists ... 66

Index 73

Introducing Electronic Reporting

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 SGS Report prevents changes being made to reports.

Q: What are the benefits of adopting Electronic Reports?
A: Time - SGS Report will process all reports and automatically identify those which require action.
Peace of mind - SGS 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

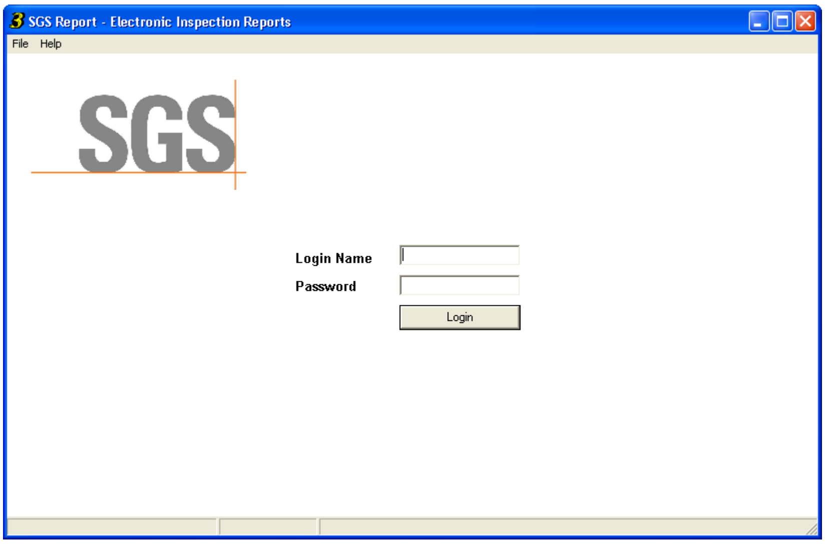
2.1 Logging On

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

SGS 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 **Logon**.

NOTE: Usernames and passwords within SGS 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.

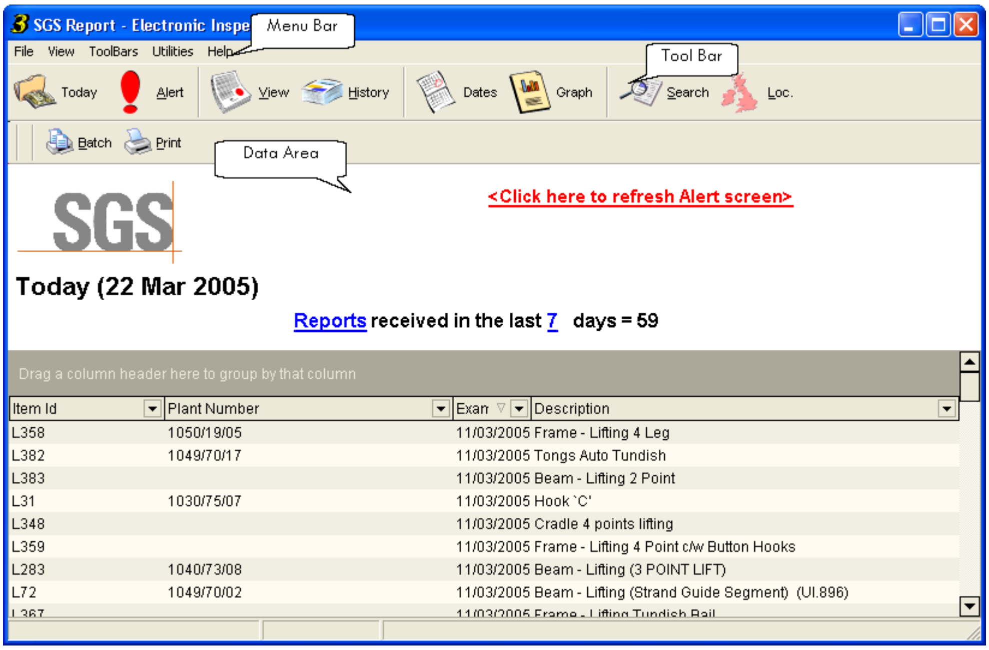
2.2 Exiting SGS Report

To exit SGS 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 SGS Report share a similar format:



<Click here to refresh Alert screen>

Today (22 Mar 2005)

Reports received in the last 7 days = 59

Drag a column header here to group by that column

Item Id	Plant Number	Exan	Description
L358	1050/19/05	11/03/2005	Frame - Lifting 4 Leg
L382	1049/70/17	11/03/2005	Tongs Auto Tundish
L383		11/03/2005	Beam - Lifting 2 Point
L31	1030/75/07	11/03/2005	Hook `C'
L348		11/03/2005	Cradle 4 points lifting
L359		11/03/2005	Frame - Lifting 4 Point c/w Button Hooks
L283	1040/73/08	11/03/2005	Beam - Lifting (3 POINT LIFT)
L72	1049/70/02	11/03/2005	Beam - Lifting (Strand Guide Segment) (UI.896)
L367		11/03/2005	Frame - Lifting Tundish Rail

- Menu Bar - this consists of File, View, ToolBars, Utilities and Help menu options and remains static throughout SGS Report.
- Tool Bar - the main navigational point within SGS Report. Click on a Tool Bar option to move to that screen.
- Data Area - information requested from SGS 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 Email options

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

Send Email with Outlook

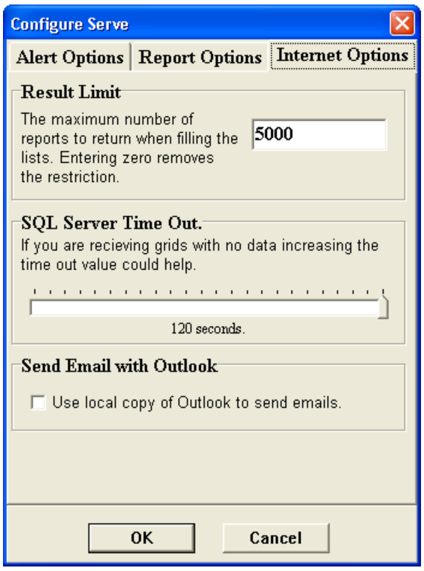
By default, email messages are sent using the in-built email package and originate from the LMP server. However, where Microsoft Outlook has been installed, it is preferable to enable Outlook as the standard email system in order that messages are sent (and are logged) on the local computer.

To use Outlook to send email:

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

© 2007 LMP

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


Configure Serve
Alert Options
Report Options
Internet Options
OK
Cancel

Result Limit

The maximum number of reports to return when filling the lists. Entering zero removes the restriction. 5000

SQL Server Time Out.

If you are recieving grids with no data increasing the time out value could help.

120 seconds.

Send Email with Outlook

☐ Use local copy of Outlook to send emails.

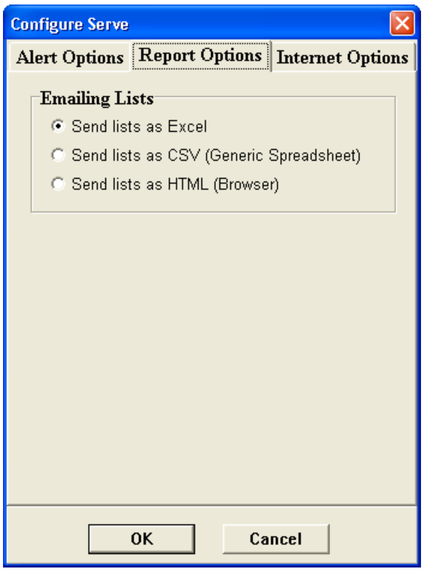
4. Click into the "User local copy of Outlook to send emails." box in order to enable the option.

Format of emailed lists

By default reports are emailed from SGS 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 Report Options tab:


Configure Serve
Alert Options
Report Options
Internet Options
OK
Cancel

Emailing Lists

● Send lists as Excel
○ Send lists as CSV (Generic Spreadsheet)
○ Send lists as HTML (Browser)

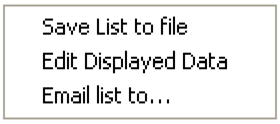
3. Click the button next to the format in which the attachments are to be sent and then click **OK** to apply the setting.

2.5 Report Lists

Many screens in SGS Report display a Report Listing in the lower half of the Data Area.

2.5.1 Working with Report Lists

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


Save List to file
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

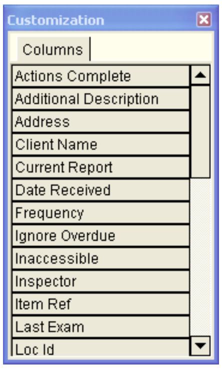
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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:


Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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:

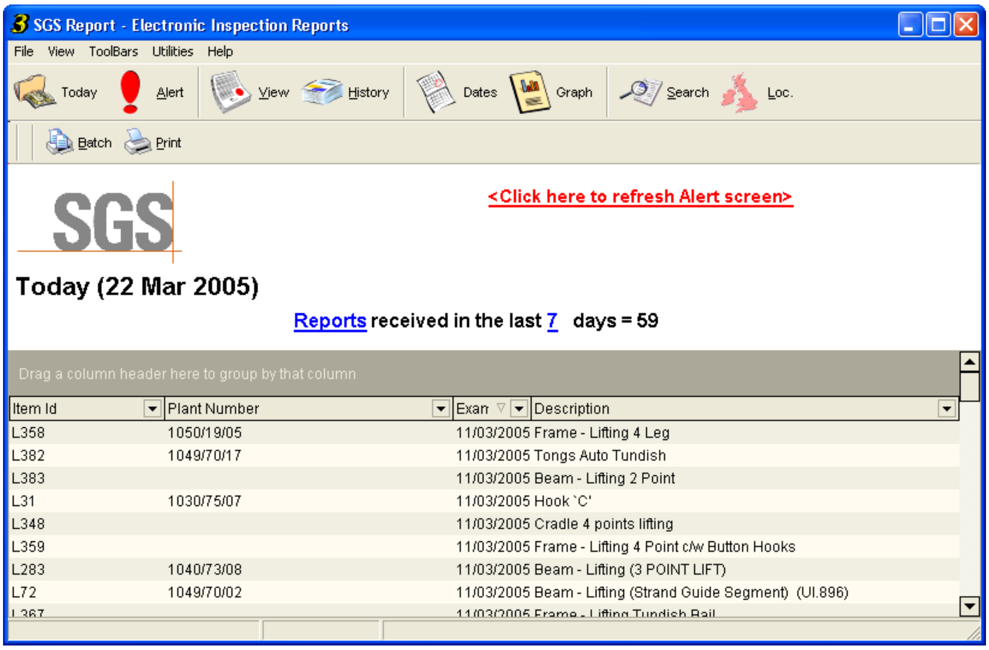
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

Today

Part III

3 Today

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


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
SGS

<Click here to refresh Alert screen>

Today (22 Mar 2005)

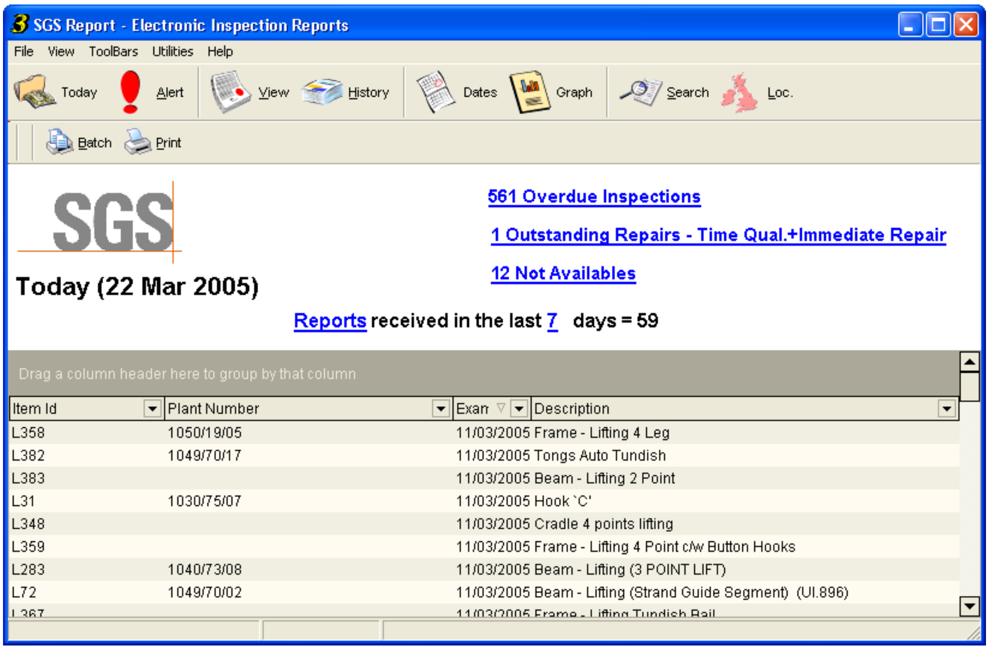
Reports received in the last 7 days = 59

Drag a column header here to group by that column

Item Id	Plant Number	Exan	Description
L358	1050/19/05	11/03/2005	Frame - Lifting 4 Leg
L382	1049/70/17	11/03/2005	Tongs Auto Tundish
L383		11/03/2005	Beam - Lifting 2 Point
L31	1030/75/07	11/03/2005	Hook `C'
L348		11/03/2005	Cradle 4 points lifting
L359		11/03/2005	Frame - Lifting 4 Point c/w Button Hooks
L283	1040/73/08	11/03/2005	Beam - Lifting (3 POINT LIFT)
L72	1049/70/02	11/03/2005	Beam - Lifting (Strand Guide Segment) (UI.896)
L367		11/03/2005	Frame - Lifting Tundish Rail

By default, this 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.

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


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
SGS

561 Overdue Inspections

1 Outstanding Repairs - Time Qual.+Immediate Repair

12 Not Availables

Today (22 Mar 2005)

Reports received in the last 7 days = 59

Drag a column header here to group by that column

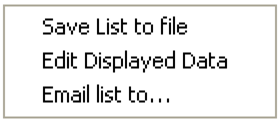
Item Id	Plant Number	Exan	Description
L358	1050/19/05	11/03/2005	Frame - Lifting 4 Leg
L382	1049/70/17	11/03/2005	Tongs Auto Tundish
L383		11/03/2005	Beam - Lifting 2 Point
L31	1030/75/07	11/03/2005	Hook `C'
L348		11/03/2005	Cradle 4 points lifting
L359		11/03/2005	Frame - Lifting 4 Point c/w Button Hooks
L283	1040/73/08	11/03/2005	Beam - Lifting (3 POINT LIFT)
L72	1049/70/02	11/03/2005	Beam - Lifting (Strand Guide Segment) (UI.896)
L367		11/03/2005	Frame - Lifting Tundish Rail

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 Repairs	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

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
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

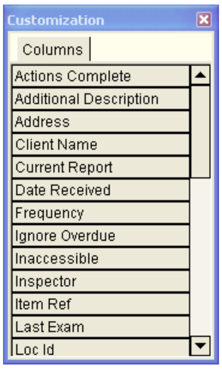
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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:


Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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:

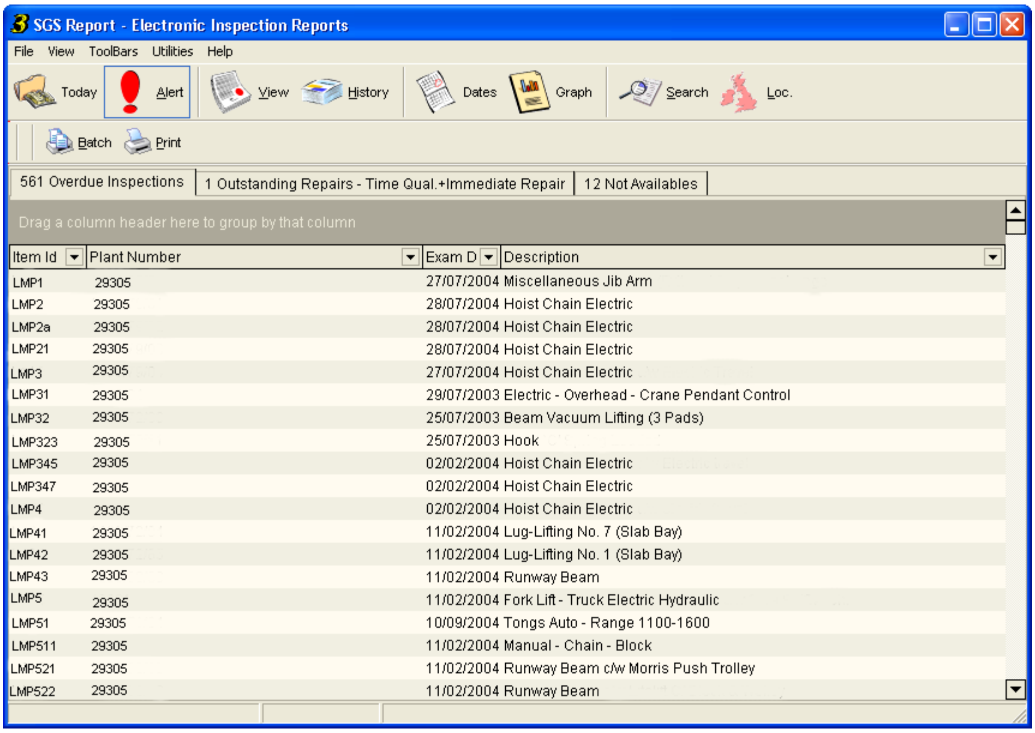
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

Part 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 "SGS 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).

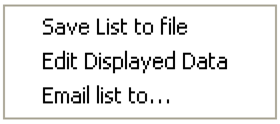

SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
561 Overdue Inspections
1 Outstanding Repairs - Time Qual.+Immediate Repair
12 Not Availables
Drag a column header here to group by that column

Item Id	Plant Number	Exam D	Description
LMP1	29305	27/07/2004	Miscellaneous Jib Arm
LMP2	29305	28/07/2004	Hoist Chain Electric
LMP2a	29305	28/07/2004	Hoist Chain Electric
LMP21	29305	28/07/2004	Hoist Chain Electric
LMP3	29305	27/07/2004	Hoist Chain Electric
LMP31	29305	29/07/2003	Electric - Overhead - Crane Pendant Control
LMP32	29305	25/07/2003	Beam Vacuum Lifting (3 Pads)
LMP323	29305	25/07/2003	Hook
LMP345	29305	02/02/2004	Hoist Chain Electric
LMP347	29305	02/02/2004	Hoist Chain Electric
LMP4	29305	02/02/2004	Hoist Chain Electric
LMP41	29305	11/02/2004	Lug-Lifting No. 7 (Slab Bay)
LMP42	29305	11/02/2004	Lug-Lifting No. 1 (Slab Bay)
LMP43	29305	11/02/2004	Runway Beam
LMP5	29305	11/02/2004	Fork Lift - Truck Electric Hydraulic
LMP51	29305	10/09/2004	Tongs Auto - Range 1100-1600
LMP511	29305	11/02/2004	Manual - Chain - Block
LMP521	29305	11/02/2004	Runway Beam c/w Morris Push Trolley
LMP522	29305	11/02/2004	Runway Beam

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:


Save List to file
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

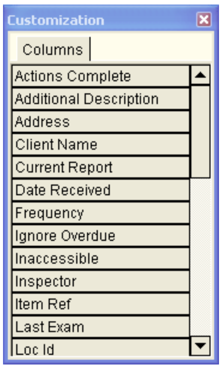
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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:



Customization

Columns

Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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:

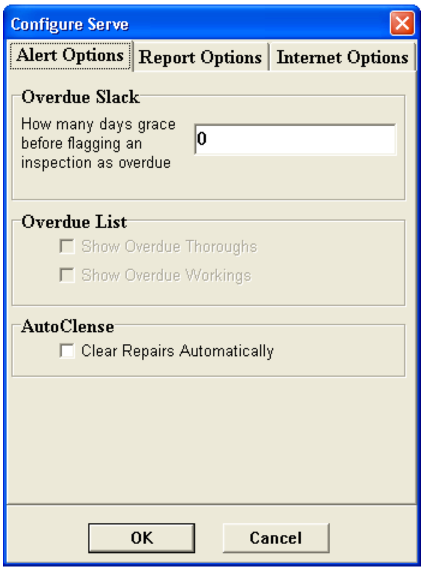
1. Double-click on the required item to view the last received report.
2. Scroll to the foot of the report and click into the "Remove from Overdue List" tick box.
3. Select the appropriate category from the drop-down list in the User Status box.
4. Add any necessary detail in the User Comments field.
5. Click the ! Alert 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 **Alert Options** tab:



Overdue Slack
How many days grace before flagging an inspection as overdue: 0

Overdue List
☐ Show Overdue Thoroughs
☐ Show Overdue Workings

AutoClense
☐ Clear Repairs Automatically

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.

4.2 Repairs

Repair Threshold

Three levels of repair categorisation are offered by SGS Report. The Repair Thresholds are:

- Immediate Repairs - statutory repairs requiring immediate attention.
- Immediate and Time Qualified Repairs - as above and time-qualified statutory repairs.
- All Repairs, Defects 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

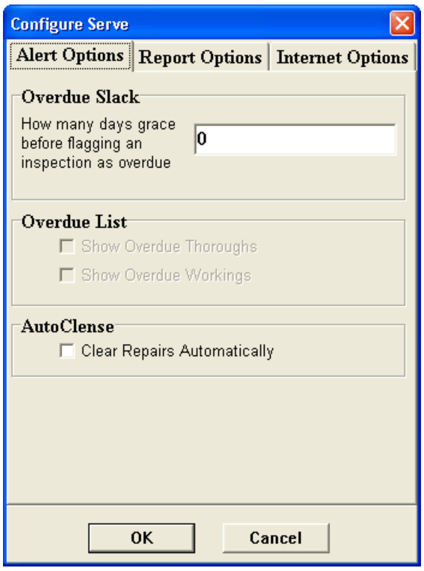
Repair information is automatically cleared from the Alert screen when a new report which does not list any repairs is received. Where an asset is repaired following an inspection, it is possible to remove it from the Outstanding Repairs screen:

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 ! Alert 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 **Alert Options** tab:



Overdue Slack

How many days grace before flagging an inspection as overdue: 0

Overdue List

☐ Show Overdue Thoroughs

☐ Show Overdue Workings

AutoClense

☐ Clear Repairs Automatically

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.

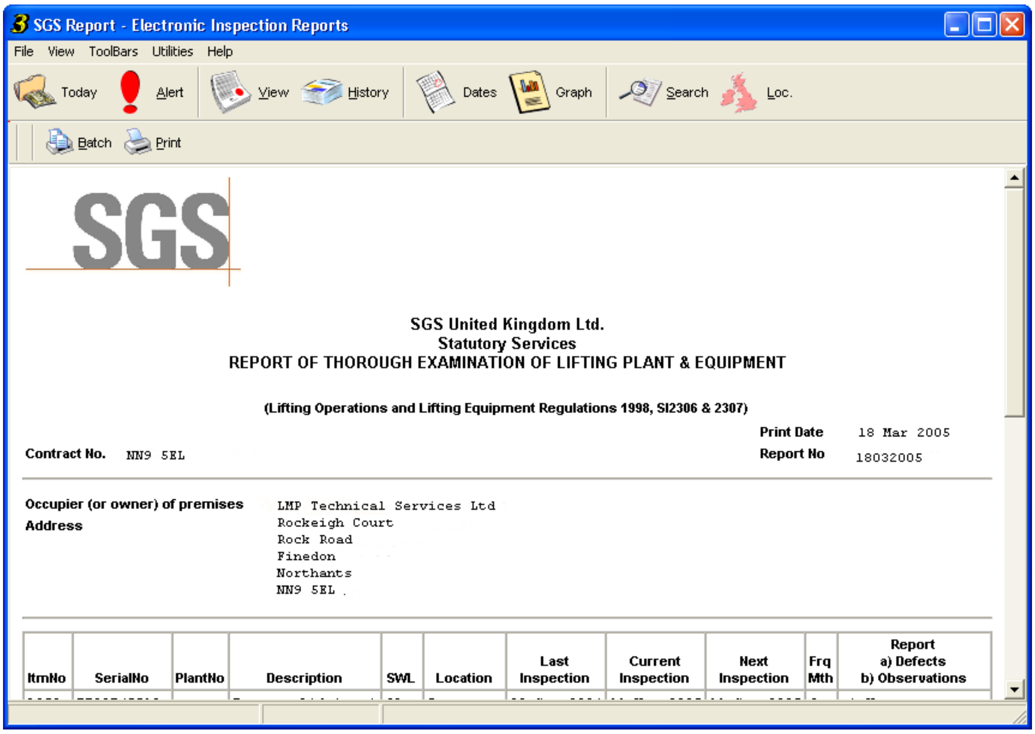
4.3 Not Available

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:


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
SGS

SGS United Kingdom Ltd.
Statutory Services
REPORT OF THOROUGH EXAMINATION OF LIFTING PLANT & EQUIPMENT

(Lifting Operations and Lifting Equipment Regulations 1998, SI2306 & 2307)

Print Date 18 Mar 2005
Contract No. NN9 5EL
Report No 18032005

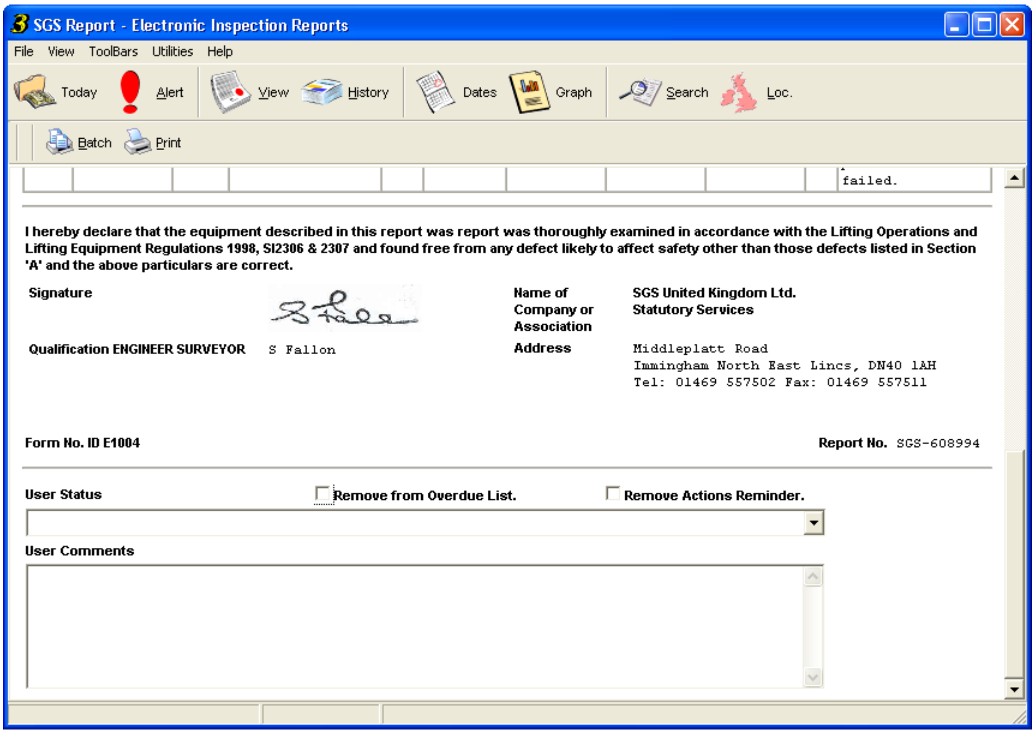
Occupier (or owner) of premises LMP Technical Services Ltd
Address
Rockeigh Court
Rock Road
Finedon
Northants
NN9 5EL

ItmNo	SerialNo	PlantNo	Description	SWL	Location	Last Inspection	Current Inspection	Next Inspection	Frq Mth	Report a) Defects b) Observations

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:



failed.

I hereby declare that the equipment described in this report was report was thoroughly examined in accordance with the Lifting Operations and Lifting Equipment Regulations 1998, SI2306 & 2307 and found free from any defect likely to affect safety other than those defects listed in Section 'A' and the above particulars are correct.

Signature

Qualification ENGINEER SURVEYOR S Fallon

Name of Company or Association **SGS United Kingdom Ltd. Statutory Services**

Address
Middleplatt Road
Immingham North East Lincs, DN40 1AH
Tel: 01469 557502 Fax: 01469 557511

Form No. ID E1004

Report No. SGS-608994

User Status ☐ **Remove from Overdue List.** ☐ **Remove Actions Reminder.**

User Comments

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 Status	Click the drop-down arrow to right-hand end of box	Select an option from the drop-down list to place a categorisation against the selected report.
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.

Printing a report

To print a copy of the report currently displayed either:

- Select File > Print from the Menu Bar, or
- Click the Print 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 SGS 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:

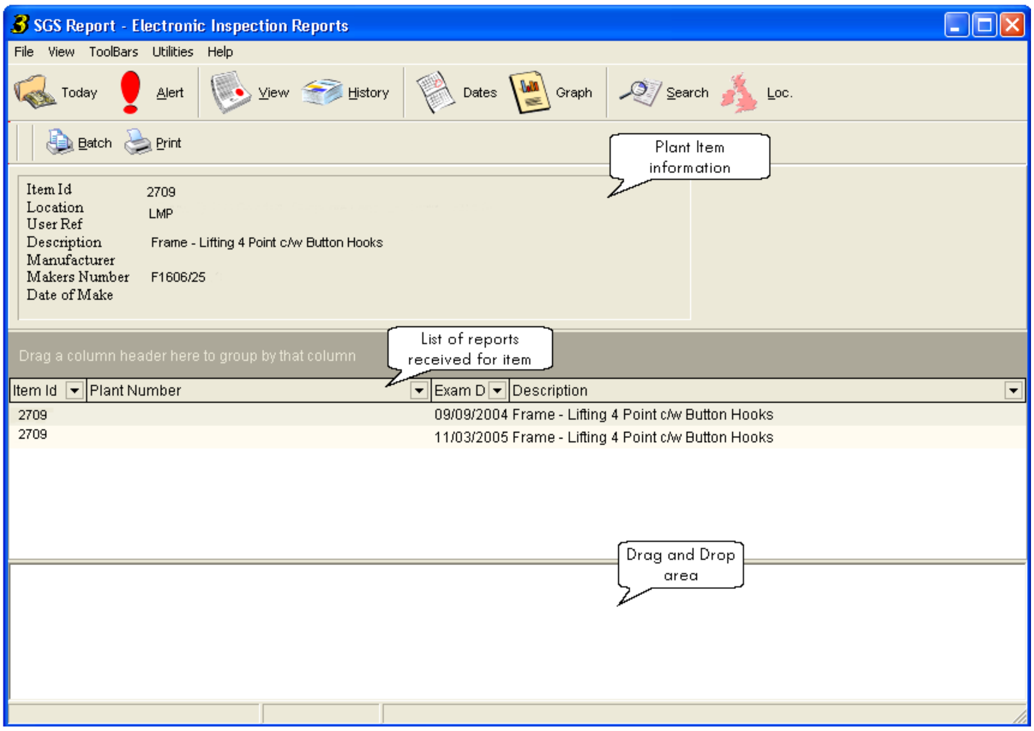
1. Right-click in the Data Area of the report.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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 History icon will have no effect.


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
Drag a column header here to group by that column

Item Id 2709
Location LMP
User Ref
Description Frame - Lifting 4 Point c/w Button Hooks
Manufacturer
Makers Number F1606/25
Date of Make

Item Id	Plant Number	Exam D	Description
2709		09/09/2004	Frame - Lifting 4 Point c/w Button Hooks
2709		11/03/2005	Frame - Lifting 4 Point c/w Button Hooks

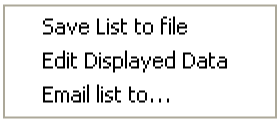
Plant Item information

List of reports received for item

Drag and Drop area

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
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

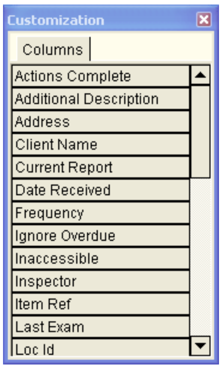
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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:


Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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

© 2007 LMP

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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

SGS 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 SGS 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 SGS 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 SGS Report.

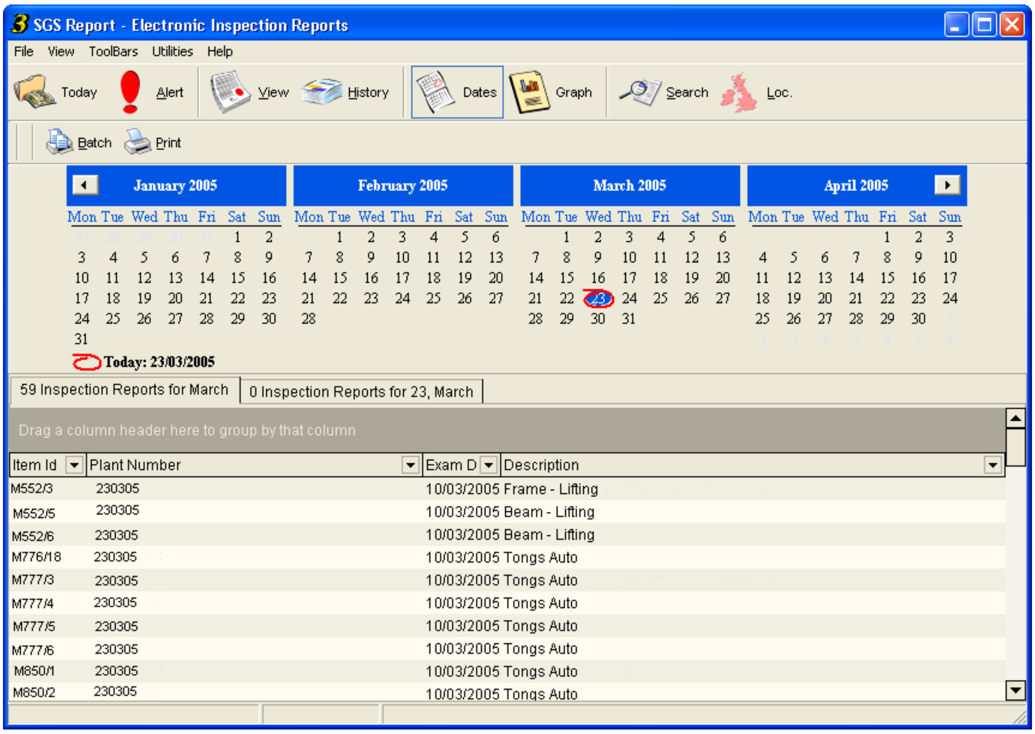
4. Add a Document Description.
5. Click **OK** to save the document, or **Cancel** to abandon the file attachment.

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 Dates from the Menu Bar:



Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

January 2005

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

February 2005

Mon	Tue	Wed	Thu	Fri	Sat	Sun
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

March 2005

Mon	Tue	Wed	Thu	Fri	Sat	Sun
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

April 2005

Today: 23/03/2005

59 Inspection Reports for March | 0 Inspection Reports for 23, March

Drag a column header here to group by that column

Item Id	Plant Number	Exam D	Description
M552/3	230305	10/03/2005	Frame - Lifting
M552/5	230305	10/03/2005	Beam - Lifting
M552/6	230305	10/03/2005	Beam - Lifting
M776/18	230305	10/03/2005	Tongs Auto
M777/3	230305	10/03/2005	Tongs Auto
M777/4	230305	10/03/2005	Tongs Auto
M777/5	230305	10/03/2005	Tongs Auto
M777/6	230305	10/03/2005	Tongs Auto
M850/1	230305	10/03/2005	Tongs Auto
M850/2	230305	10/03/2005	Tongs Auto

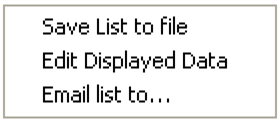
The top half of the screen is a calendar which defaults to today's date. The lower half of the screen has two tabs which display Inspection Reports received. By default, the first tab displays reports received in the current month, whilst the second tab displays reports received on the current day.

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
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

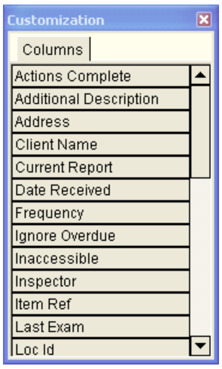
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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:


Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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

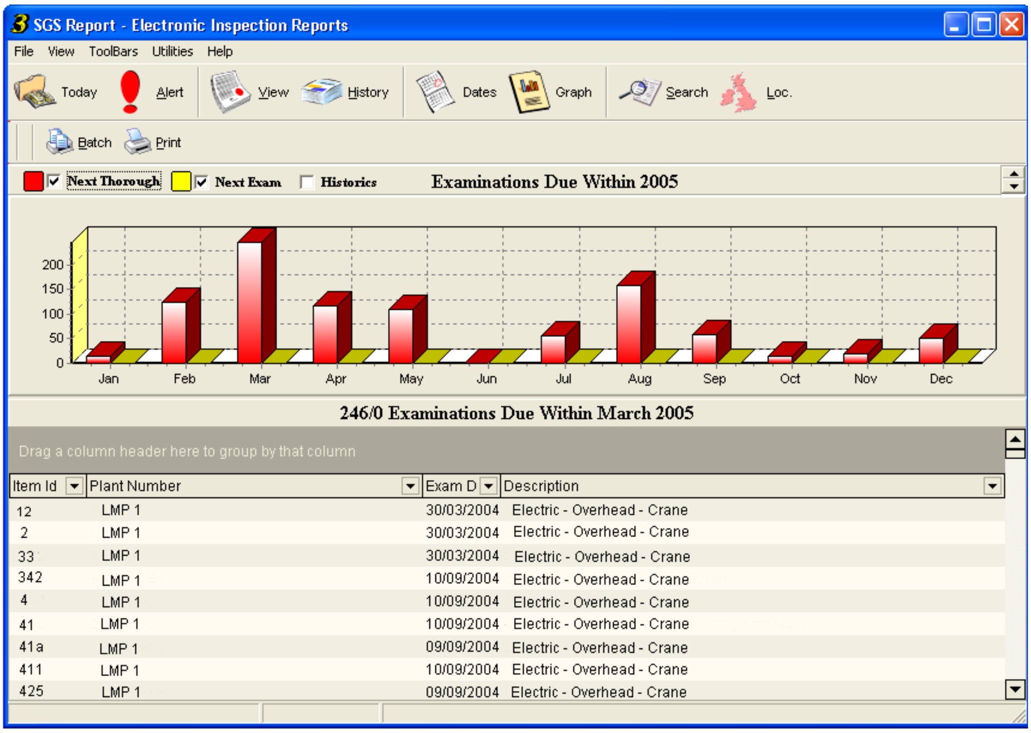
To print the currently displayed report listing:

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, SGS Report produces graphs to show when the next inspection for a particular item of plant is due. To access the graphing option, click Graph 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:

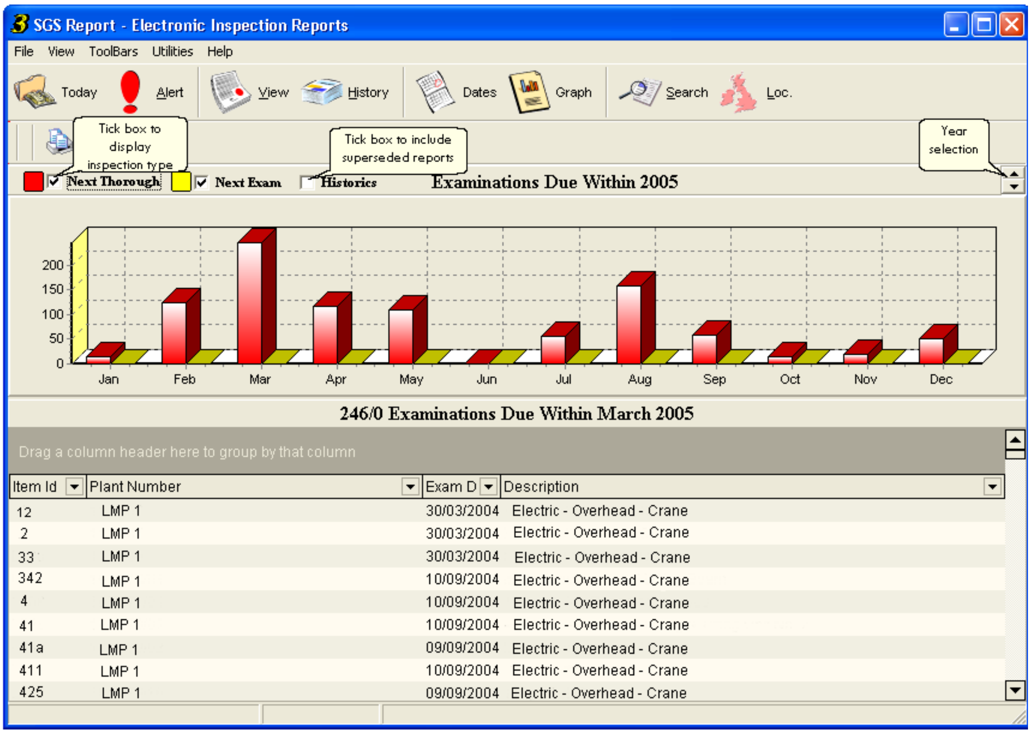

SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
☑ Next Thorough
☑ Next Exam
☐ Historics
Examinations Due Within 2005
200
150
100
50
0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Drag a column header here to group by that column

246/0 Examinations Due Within March 2005

Item Id	Plant Number	Exam D	Description
12	LMP 1	30/03/2004	Electric - Overhead - Crane
2	LMP 1	30/03/2004	Electric - Overhead - Crane
33	LMP 1	30/03/2004	Electric - Overhead - Crane
342	LMP 1	10/09/2004	Electric - Overhead - Crane
4	LMP 1	10/09/2004	Electric - Overhead - Crane
41	LMP 1	10/09/2004	Electric - Overhead - Crane
41a	LMP 1	09/09/2004	Electric - Overhead - Crane
411	LMP 1	10/09/2004	Electric - Overhead - Crane
425	LMP 1	09/09/2004	Electric - Overhead - Crane

8.1 Working with Graph

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


SGS Report - Electronic Inspection Reports
File View ToolBars Utilities Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Tick box to display inspection type
Tick box to include superseded reports
Year selection
☑ Next Thorough
☑ Next Exam
☐ Historics
Examinations Due Within 2005
200
150
100
50
0
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Sep
Oct
Nov
Dec
Drag a column header here to group by that column

246/0 Examinations Due Within March 2005

Item Id	Plant Number	Exam D	Description
12	LMP 1	30/03/2004	Electric - Overhead - Crane
2	LMP 1	30/03/2004	Electric - Overhead - Crane
33	LMP 1	30/03/2004	Electric - Overhead - Crane
342	LMP 1	10/09/2004	Electric - Overhead - Crane
4	LMP 1	10/09/2004	Electric - Overhead - Crane
41	LMP 1	10/09/2004	Electric - Overhead - Crane
41a	LMP 1	09/09/2004	Electric - Overhead - Crane
411	LMP 1	10/09/2004	Electric - Overhead - Crane
425	LMP 1	09/09/2004	Electric - Overhead - Crane

Inspection Type and Superseded Reports

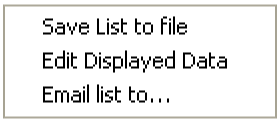
The "Next Thorough", "Next Exam" and "Historics" tick boxes may be ticked/unticked to alter the information presented by the graph. The "Next Thorough" and "Next Exam" tick boxes control which type of inspection to display, whilst the Historics box controls whether superseded reports are displayed. As 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
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

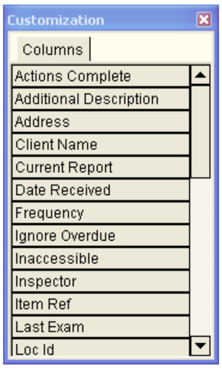
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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:



Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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

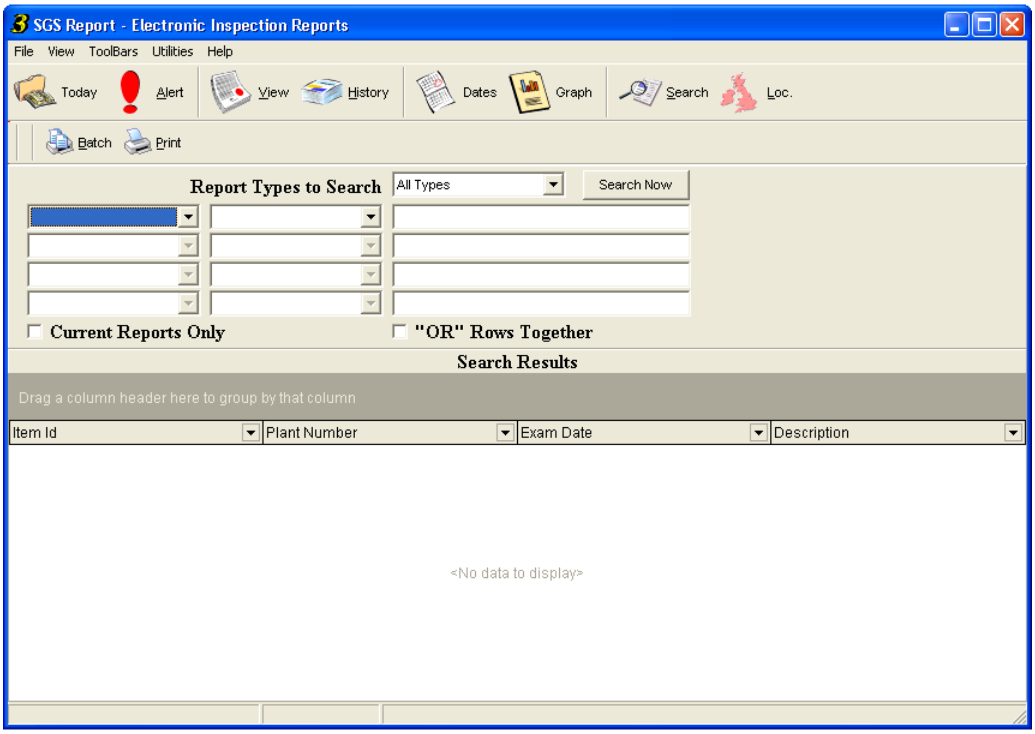
To print the currently displayed report listing:

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.


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
Search Now
Search Results

Report Types to Search: All Types

☐ Current Reports Only

☐ "OR" Rows Together

Drag a column header here to group by that column

Item Id	Plant Number	Exam Date	Description

<No data to display>

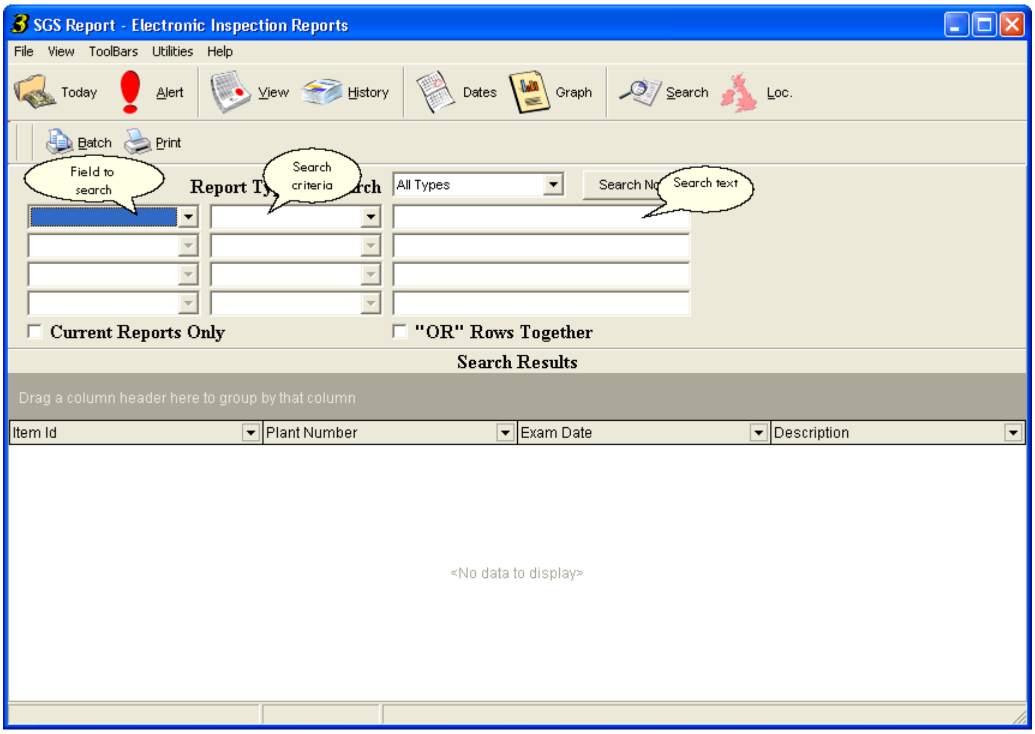
Building a search

1. Select Search 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
   - Local Exhaust Ventilation
   - 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:


SGS Report - Electronic Inspection Reports
File View ToolBars Utilities Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
Field to search
Search criteria
Report Ty
rch
All Types
Search No
Search text
☐ Current Reports Only
☐ "OR" Rows Together
Search Results
Drag a column header here to group by that column
Item Id
Plant Number
Exam Date
Description
<No data to display>

   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 SGS 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

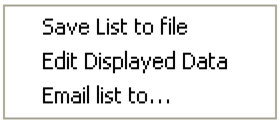
For example, to search for immediate repairs listed on current reports:

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
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

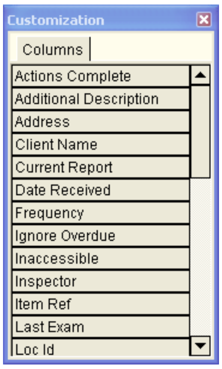
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save.**

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:


Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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:

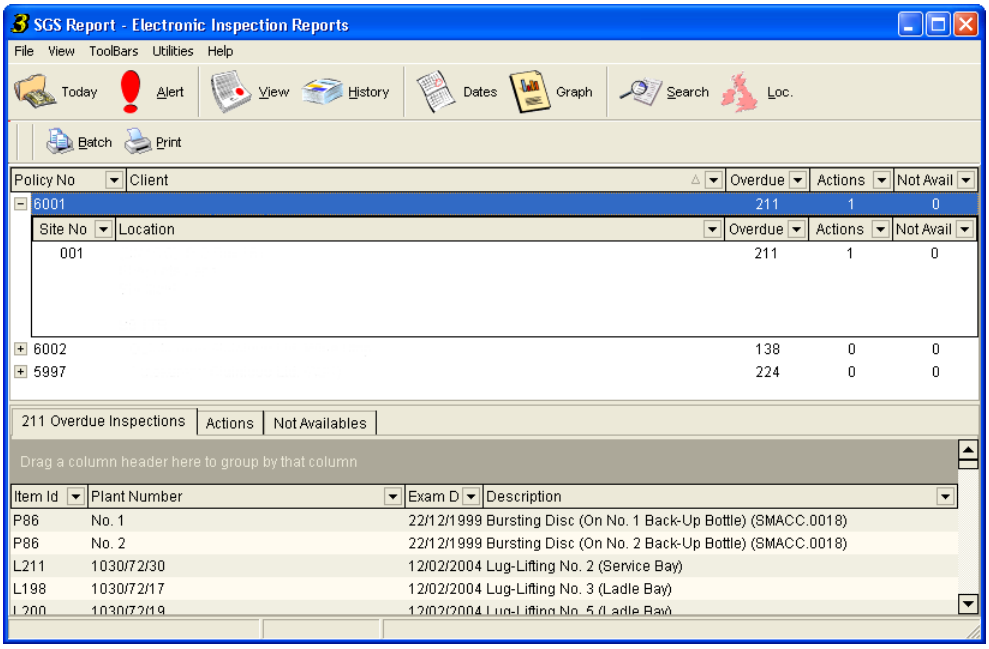
1. Select File > Print from the Menu Bar.
2. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and click **OK** to print.

Part X

10 Location

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

To open the Location screen, select Loc. from the Tool Bar:


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
Drag a column header here to group by that column

Policy No	Client	Overdue	Actions	Not Avail
6001		211	1	0
6002		138	0	0
5997		224	0	0

Site No	Location	Overdue	Actions	Not Avail
001		211	1	0

211 Overdue Inspections | Actions | Not Availables

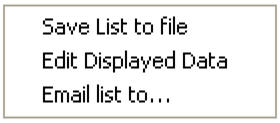
Item Id	Plant Number	Exam D	Description
P86	No. 1	22/12/1999	Bursting Disc (On No. 1 Back-Up Bottle) (SMACC.0018)
P86	No. 2	22/12/1999	Bursting Disc (On No. 2 Back-Up Bottle) (SMACC.0018)
L211	1030/72/30	12/02/2004	Lug-Lifting No. 2 (Service Bay)
L198	1030/72/17	12/02/2004	Lug-Lifting No. 3 (Ladle Bay)
L200	1030/72/19	12/02/2004	Lug-Lifting No. 5 (Ladle Bay)

The Location screen is in 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
Edit Displayed Data
Email list to...

Save List to file

To save the currently displayed report listing:

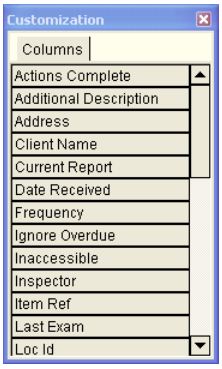
1. Right-click in the Data Area of the screen.
2. Select "Save As..." from the subsequent menu.
3. Navigate to the location in which the file is to be saved, select the appropriate file type from the drop-down list and set a filename.
4. Click **Save**.

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:


Customization
Columns
Actions Complete
Additional Description
Address
Client Name
Current Report
Date Received
Frequency
Ignore Overdue
Inaccessible
Inspector
Item Ref
Last Exam
Loc Id

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 View from the Tool Bar.

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 the Email Batch icon 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.

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

© 2007 LMP

    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 Batch icon on the Tool Bar.
3. The standard Windows print control box will then open offering a choice of printer. Make any necessary changes and 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.

Advanced Features

Part XI

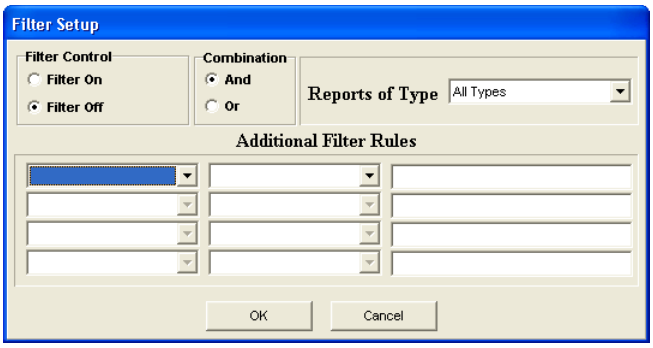
11 Advanced Features

11.1 Setup Filter

The Setup Filter enables a restriction to be placed on the set of reports with which SGS Report is currently working - once a filter is applied, all screens within SGS 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:



Filter Setup

Filter Control
○ Filter On
● Filter Off

Combination
● And
○ Or

Reports of Type: All Types

Additional Filter Rules

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

SGS 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

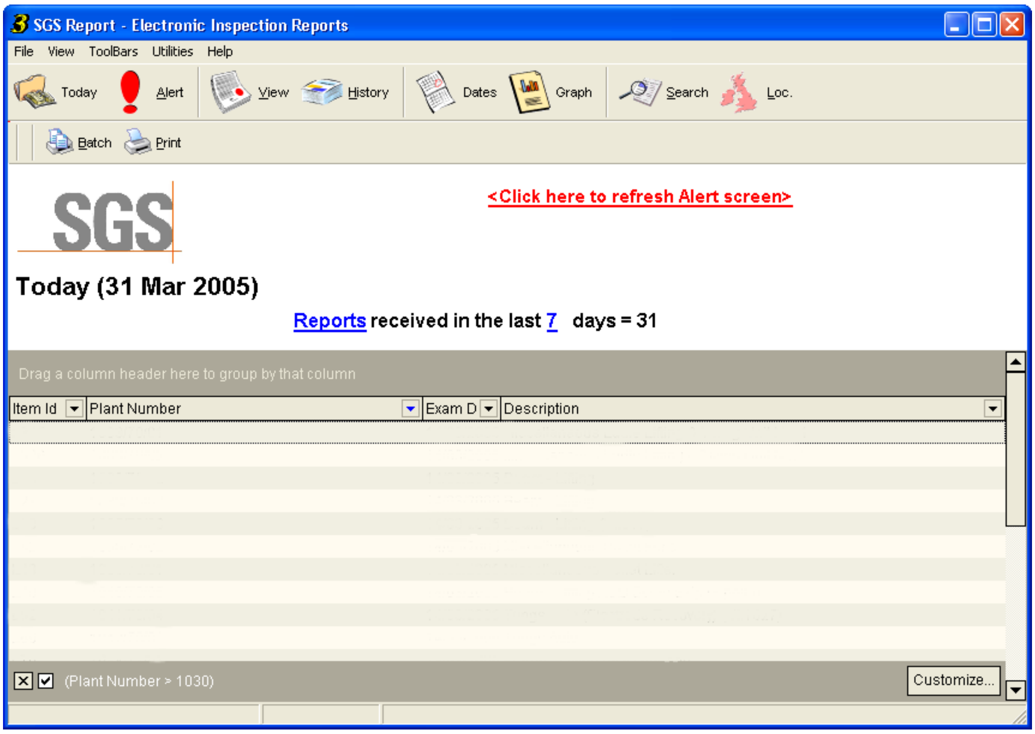
To remove a filter, either:

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


SGS Report - Electronic Inspection Reports
File
View
ToolBars
Utilities
Help
Today
Alert
View
History
Dates
Graph
Search
Loc.
Batch
Print
SGS
Item Id
Plant Number
Exam D
Description
Customize...

<Click here to refresh Alert screen>

Today (31 Mar 2005)

Reports received in the last 7 days = 31

Drag a column header here to group by that column

☒ ☑ (Plant Number > 1030)

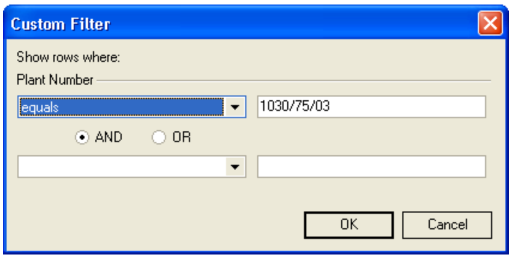
The Customize Bar appears at the foot of the Data Area when any filter is applied. The current filter will appear at the left-hand end of the Customize Bar.

- 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:


Custom Filter
OK
Cancel

Show rows where:

Plant Number

equals 1030/75/03

● AND ○ OR

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

Index

Index

- A -

attach documents 34
autoclense 26

- B -

batch email 11, 16, 22, 34, 40, 47, 55, 60
batch print reports 11, 16, 22, 34, 40, 47, 55, 60

- C -

clearing overdue inspections 25
custom filters 66
customize bar 66

- D -

documents 34
  attach 34

- E -

edit displayed data 11, 16, 22, 34, 40, 47, 55, 60
email
  batch email 11, 16, 22, 34, 40, 47, 55, 60
  email list to 11, 16, 22, 34, 40, 47, 55, 60
exit 8

- F -

filtering report lists 66
filters
  custom filters 66
  customize bar 66
  filtering report lists 66

- G -

grouping report lists 66

- H -

historics 47

- L -

log out 8
logon screen 8

- M -

Microsoft Outlook 9

- N -

next exam 47
next thorough 47
non-inspection 27
not availables 27

- O -

outstanding repairs 26
  remove actions reminder 26
overdue inspections 25
  remove from overdue list 25
  slack period 25

- P -

password 8
printing report 11, 16, 22, 34, 40, 47, 55, 60

- R -

remove actions reminder 26, 30
remove from overdue list 25, 30
repair threshold 26
repairs 26
report
  batch print reports 11, 16, 22, 34, 40, 47, 55, 60
  print report 11, 16, 22, 34, 40, 47, 55, 60
  view report 11, 16, 22, 34, 40, 47, 55, 60
report lists 11, 16, 22, 34, 40, 47, 55, 60
report type 52

- S -

save list to file 11, 16, 22, 34, 40, 47, 55, 60
setup filter 66
slack period 25

sorting report lists 66

- U -

user comments 30
user status 30
username 8

- V -

view report 11, 16, 22, 34, 40, 47, 55, 60

LMP Technical Services Ltd
Rockleigh Court
Rock Road
Finedon
Northants
NN9 5EL

Telephone: 01933 683810

Fax: 01933 683819

Web: www.lmp.co.uk

Email: support@lmp.co.uk