

GREEN

Global Report Editing & Exchange Network

SERVICES:

Ashdale Engineering keep your people safe and your business compliant. We offer a range of engineering inspection, risk management and consultancy services across the UK and internationally.

<http://green2.ashdale-engineering.com>

Ashdale Engineering | GREEN

Getting the Most from Your Data

A Quick Start Guide to Accessing Your Information & Reports

Customer Version

Spring 2017. v1.01

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Introduction

Ashdale Engineering's new **Green** system (or 'Green 2' as it's become widely known) went fully live in 2016.

Ashdale Engineering wanted to create a user-friendly experience, so that customers and staff could retrieve data quickly and easily. Every focus is on simplification and speed: Our customers have told us these aspects are the most important to them.

Future Objectives –

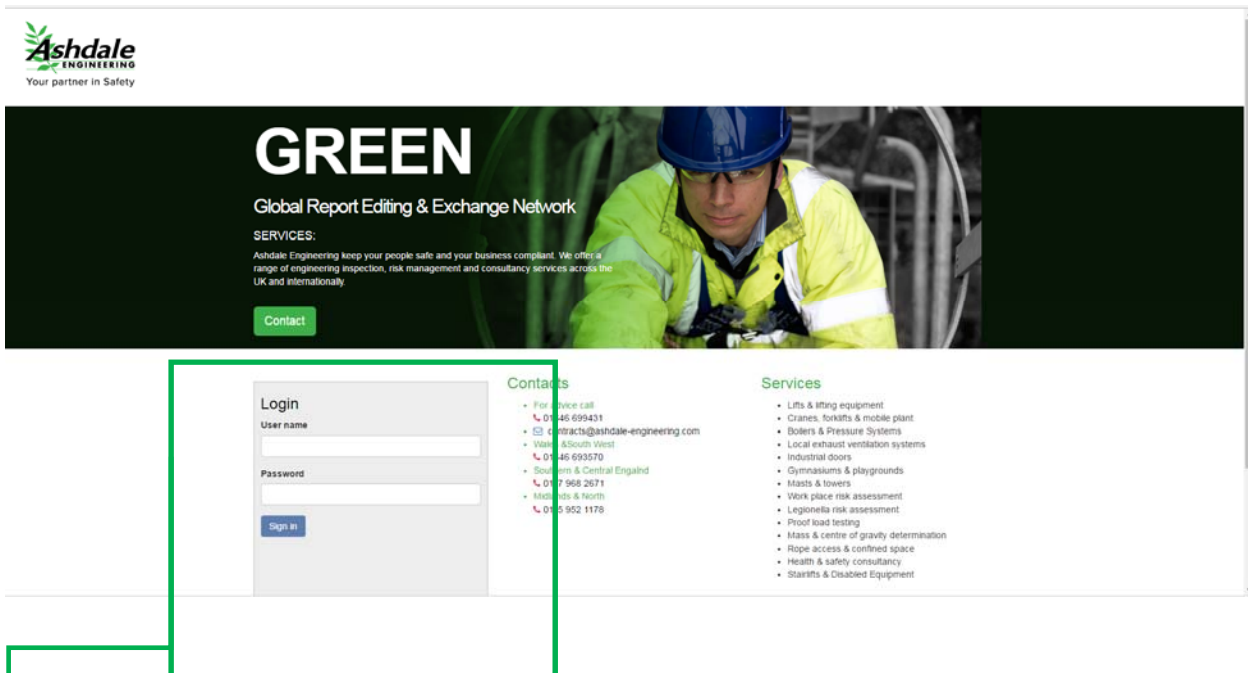
We have received some excellent feedback for our new **Green** system, but there is much more to come!

Ashdale Engineering is fully committed to the ongoing development of **Green**. We want to establish **Green** as the best and most user-friendly system of its kind in our industry.

Ashdale Engineers now capture inspection and technical data via tablet computers, which has allowed the data to be transferred onto the website for viewing quicker than ever.

We look forward to adding more features and improvements; e.g. the option for our customers to receive an email as soon as reports are ready to view and a facility to view written schemes are both in development and will be live shortly.

1. Logging into the System



The screenshot shows the Ashdale Engineering website. At the top left is the Ashdale Engineering logo with the tagline "Your partner in Safety". The main header features the word "GREEN" in large white letters, followed by "Global Report Editing & Exchange Network". Below this, there is a "SERVICES:" section with a brief description and a "Contact" button. The main content area is divided into three columns: "Login", "Contacts", and "Services". The "Login" column contains a form with fields for "User name" and "Password", and a "Sign in" button. The "Contacts" column lists regional office information. The "Services" column lists various engineering services. A green box highlights the login form, and a green line connects it to the list of instructions below.

- a. You will have been provided with a safe and secure user name and password.
- b. Please enter these in the fields provided
- c. Select 'Sign in'.
- d. We strongly recommend that, if you're logging on from your regular machine (i.e. not a computer being used in a public space); you allow the browser to auto-save your username and password. This automatically logs you in each time you visit.
- e. If you have problems logging in and have forgotten your username or password, you will need to contact Ashdale Engineering and you will be provided with a re-set.

Note: Green functions with major PC browsers: Microsoft Internet Explorer, Mozilla Firefox and Google Chrome.

2. Searching for your Data

Use this screen to Find, Search and Filter the information you need.

Data Search Fields – Using Criteria to find Your Information

1.) Name of Customer

2.) **Site Field** – Defaults to 'All Sites'. Allows you to select only data relevant to a particular site.

3.) **Location/ Building** – Free text field. See only data from a particular part of the site.

E.g. Type 'Boiler House'; this will show results for 'Boiler House'; for 'Block C Boiler House'; and/or for 'Boiler House No.6'

4. **Area** – Drop-down box. Relevant to some customers, not all –

E.g. 'North Area', 'London' or 'Schools Department'.

5. **Type** – This option allows you to narrow the search based on the 'type' of item you're looking for.

E.g. If you only wish to see lift inspections, select 'Lifting Equipment' from the drop-down menu.

6. **Asset ID** – If you know the ID you are looking for and wish to only display 1 asset.

7. **User Ref** – Enter the user reference, if relevant, to narrow the search down to an item or small selection of items.

8. **Manufacturer** – To search for all assets of a certain manufacturer, enter the name in this field

9. **Serial Number** – As with ‘6’ & ‘7’, if you are looking for an asset with a certain manufacturer’s number, please choose this field. If you are searching for an asset with a serial number of ‘012345’, entering this number exactly will bring up only this asset. However, if another asset in your search has a serial number of ‘012345-02’ it will display both assets.

You can filter assets as you wish in the ‘Asset Search Results’ screen.

10. **Item Description** – Use this field to return only assets with a specific description
e.g. If you are searching for ‘Lift’, this may well return several entries: ‘*Passenger/ Goods Lift*’, ‘*Patient Lifting Device*’, ‘*Lifting Sling*’ etc. The more specific entry, the more focussed the asset results will be.

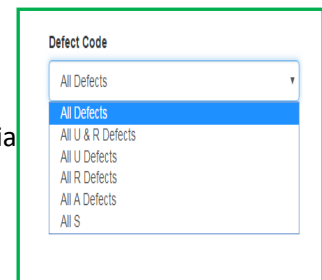
11. **W/ Scheme Ref** – For pressure systems, you may wish to search using the Written Scheme of Examination reference number.

12. **Client Ref** – Green allows customers to search for bespoke references. This may be an internal job/ order number, reference number from an internal system or important code integral for tying up internal documents and KPI’s. Green allows your bespoke references to be searched for and to appear on your reports, if desired.

13. **Job No** – Each visit/ visit type carried out by Ashdale Engineering will have our own reference number. Should you need to query information with Ashdale, using our Job No reference will help us find the details for you quicker.

14. **Defect Code** – Allows users to find only assets with a certain severity of defect.

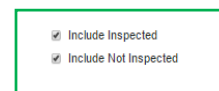
E.g. Choose ‘*All U & R Defects*’ to find all assets - within whatever criteria you have chosen - which require either immediate or time-qualified attention.



Conversely, ‘*All S*’ will show only those assets considered serviceable, without any defects or observations noted.

Displaying only ‘inspected’ or ‘not inspected’ Assets

Ashdale Engineering makes every effort to ensure 100% of assets requiring an examination are thoroughly inspected on or before its due date.



However, due to reasons beyond our control sometimes assets are unable to be inspected.

E.g. ‘Unable to locate item’, ‘Item inaccessible’ or ‘Item currently out of commission’.

Whereby we are unable to inspect an asset, we issue a document stating when we tried to carry out the visit(s) and the reason(s) why we were unable to carry out a thorough examination.

The tick-box function on Green enables you to toggle between both. You may wish to *only* view items which couldn’t be inspected last time (perhaps to analyse ‘not inspected’ assets to check their maintenance status/ check against internal records to see if assets have returned to service etc).

Tick whichever boxes are relevant to the assets you wish to view. This is defaulted to show ALL assets.

Using the Date Functions

Narrowing your search to a particular period of time.

The dates boxes will allow date parameters to be set.

You may wish to:

- Search for inspections which have already taken place (check the **'Last Visit'** button).
- Search for inspections which are coming due (check the **'Next Visit'** button).

Date to Search

Last Visit Next Visit

From: 01-01-2017 To: 28-04-2017

Inspections to Search: Show latest visit only

Inspection Search Or Show Assets

Reset Search

Use the calendar facility to firstly pick the year, month then day on both the 'From' and 'To' boxes.

E.g. If you wish to search for all inspection visits taken place between Jan 1st 2017 and Apr 28th 2017 inclusive, enter these two date parameters.

Data returned in your search results will reflect this criteria.

'Inspections to Search' Drop-Down Box - Searching for Historical Data

'Show Latest Visit Only' (Default Option) – This will display data for only the last visit (i.e. the most up to date record)

'Show all Previous Visits' – This will display all historical data associated with the asset(s) in question, unless overridden by inputted dates in the fields above.

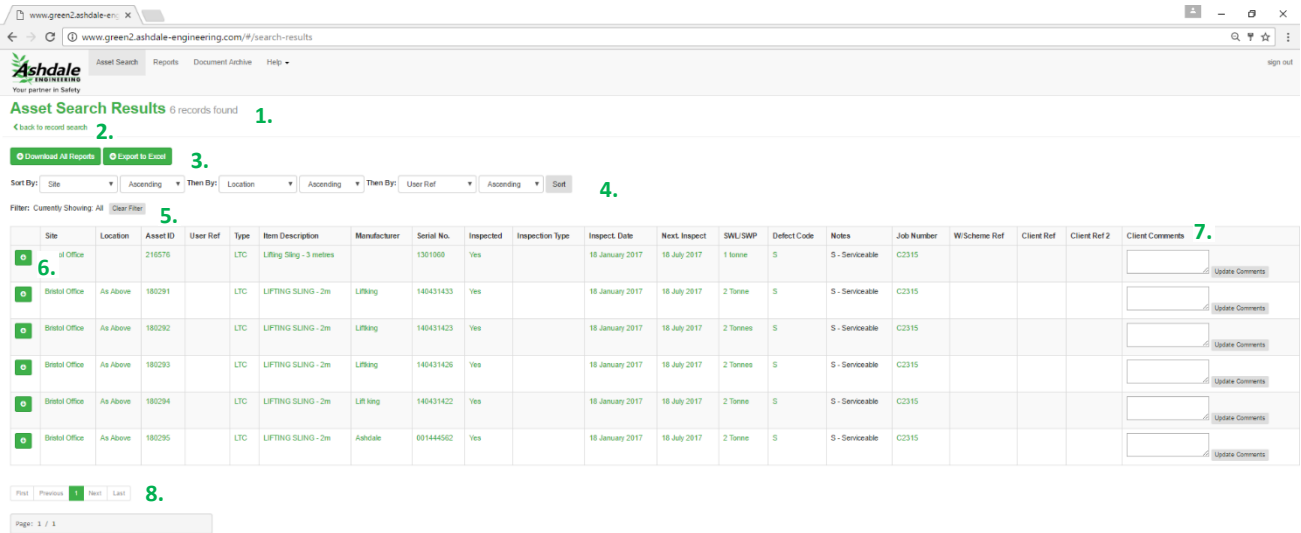
To **reset the search** completely and start again with another set of criteria, the quickest

Reset Search

And easiest method would be to select the 'Reset Search' button at the bottom of the screen.

Making Sense of your Search Results

How to find your data and documents...



1. 'No. of Results Found' – States the number of records returned from the criteria entered on the first screen.
2. 'Back to Record Search' – Return to the first screen
3. Get Reports in Bulk or View in an Excel Format

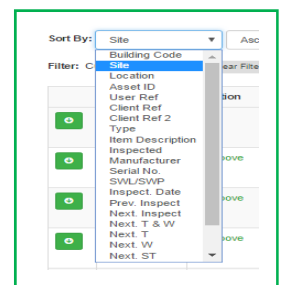
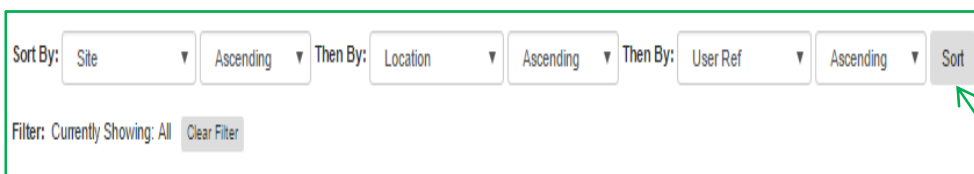
Download all Reports – Select the button in the top left of the screen.

This option allows all individual documents for each asset displaying in the table to be downloaded. The files will be downloaded via a zip file. To view the file, simply access directly via your browser, locate in the 'Downloads' folder on your local computer or, if not located, consult your I.T Department to establish which folder stores files downloaded from your browser. Once located, open the zip file in the usual way and extract the PDF files you need.

Export to Excel – Select the button in the top left of the screen.

All data displayed on the page will be transferred to a spreadsheet format and download to an Excel, which will pop-up in your browser. To view the file, simply access directly via your browser, locate in the 'Downloads' folder on your local computer or, if not located, consult your I.T Department to establish which folder stores files downloaded from your browser. You'll find your Excel in this folder.

4. Sort & Order your Data



Data can be viewed in whichever order is suitable for you. The default order is shown in the graphic above. To re-order the data, use the menus as detailed above. You can sort by up to 3 levels of data field in either ascending or descending order. When you have selected your preferred order, select the 'Sort' button.

5. Filtering Data

All data coloured green can be filtered. To filter on a certain value, simply select the data.

E.g. If you only wish to view only 'Steam Boilers', click this word in the description column and only steam boilers will appear in the query.

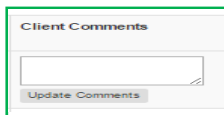
To revert back to view all data and remove the filter: Select the 'Clear Filter' button.

6. View/ Download an Individual Report



Clicking on this icon to the left-hand side of an asset will automatically download the PDF report for the asset. This file can be viewed or downloaded as appropriate.

7. Client Comments - Adding your own notes



Green allows customers to add their own notes and memos if they so wish. Many of our customers wish to annotate inspections, for example to ensure maintenance works have been successfully scheduled or carried out if a defect has been detected.

Each asset visited features a 'free-text' field in which notes can be taken. Simply type in the relevant field and then select '*Update Comments*'. This will make a notation against any given asset, which can be referred back to.

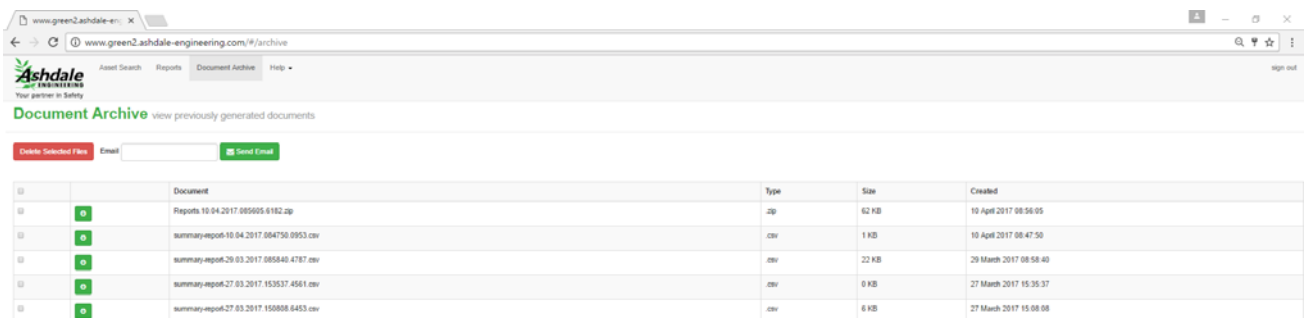
It is important to consider that your notes are saved against an 'event', not an 'asset'. For example, if notes were made against a passenger lift inspected 01/06/2016, the notes will be continually associated against that 'event' and will subsequently not feature against the following inspection visit around 01/12/2016.

8. Navigate through pages

By default, if relevant, 50 results appear per page.

To navigate through your search results, use the page numbers featured at the bottom of the screen.

Saving and Emailing your Documents

A screenshot of a web browser showing the 'Document Archive' page. The page has a navigation bar with 'Asset Search', 'Reports', 'Document Archive', and 'Help'. Below the navigation bar, there is a 'Document Archive' section with a 'Delete Selected Files' button and an 'Email' input field with a 'Send Email' button. A table lists documents with columns for 'Document', 'Type', 'Size', and 'Created'.

ID	Document	Type	Size	Created
10	Reports 10-04-2017-095055-6182.zip	zip	62 KB	10 April 2017 08:56:05
11	summary-report-10-04-2017-084750-0953.csv	csv	1 KB	10 April 2017 08:47:50
12	summary-report-29-03-2017-085440-4787.csv	csv	22 KB	29 March 2017 08:58:40
13	summary-report-27-03-2017-153537-4561.csv	csv	0 KB	27 March 2017 15:35:37
14	summary-report-27-03-2017-150808-8453.csv	csv	6 KB	27 March 2017 15:08:08

Green allows users to access documents whenever convenient.

Each document generated – reports or Excels – is saved to your 'Document Archive' which is always accessible at the top of the page. Documents are listed in chronological order.

Select a file or number of files to download or view again whenever convenient, or alternatively enter an email address and select 'Send Email' to email the files to a recipient.

Adding & Deleting Assets

Ashdale Engineering are happy to add and delete assets to your inspection schedule on Green as and when required. Whenever an adjustment to your data is required, just email your main contact point.

To assist us in adding or removing your data quickly and successfully, we would appreciate the following fields being included in your email as a minimum:

- Site/ Location
- Item Description (including capacity/ SWL/ SWP if known)
- Unique/ Serial number
- Due Date (if applicable)

Help & Support/ FAQs

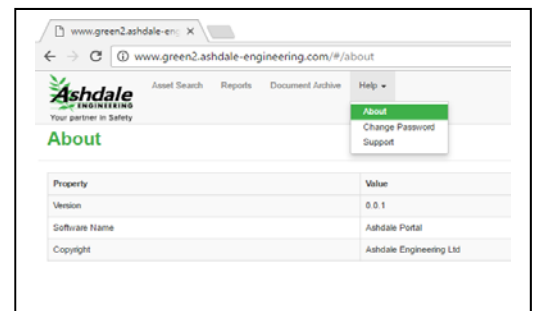
“I have forgotten my password”

- Phone or email your usual contact at Ashdale to re-set your password and we can get this changed for you quickly so you'll be able to log back in.

We recommend setting up a new memorable password once it has been re-set and that your password has a mixture of letters and at least 1 number and/or punctuation.

Remember that passwords are case sensitive.

- To change your password, refer to the top of the screen. Select 'Help' and then 'Change Password'.



“My reports don't come up when I click the icon – Why not?”

- The website uses pop-ups for reports. This means that when you click on one of the buttons to generate a PDF report/ set of reports/ an Excel, this either generates the file in a new 'pop up' tab in your browser and/ or downloads the file directly to your browser or 'Downloads' file on PC.
- Most browsers don't allow pop-ups from websites visited for the first time; this is for reasons of security and to prevent unwanted malware or adware from malicious sites which could potential lead to a computer virus.
- Ensure that if you receive a message asking whether to allow Pop-Ups from Green, you answer 'Yes' or 'Allow' or **'Allow Pop-Ups for this Site'**.
- If this message doesn't appear, but still blocks pop-ups, refer to 'Settings' in your browser.

“When I try to load Green there is an error message about a 'firewall' or security issues – Why is this?”

- For network settings within organisations with high security (such as the MoD), it is possible that if you're accessing Green for the first time, a message will advise that security has blocked the website from being accessed.
- To our knowledge, all our customer's networks – including MoD and its contractors – now allow the 'Green 2' website. If this is not the case, please refer to your I.T Department. If your I.T representatives advise of any further issues preventing access to Green, please ask them to contact Ashdale Engineering or speak with your Contract Manager and provide contact details of your I.T representative.

“Why can’t I generate an Excel using iPad or iPhone?”

- If you do not have the appropriate Windows app, iOS will not recognise the software and therefore not generate the Excel. Microsoft Office predominantly works with Windows machines, but Office apps are now available for both iOS and Android operating systems.

“Why do my zip files not work?”

To extract files from a zip file, firstly save your zip file to a local folder or your Desktop. Either double-click on the file or right-click, where you will be able to ‘Open’ the zip folder or ‘Extract from’ (meaning all files in the zip folder can be either copy and pasted to your computer or you can simply drag and drop the files).

Green is designed to work with standard software, so if you are still experiencing problems, we recommend that you right-click on the zip file and choose ‘Properties’.

In Properties, it will ask you to/ allow you to associate a programme with this folder. The option may read ‘Open With...’. Choose to associate the file with ‘Windows Explorer’ in the list and click ‘OK’.

Go ahead and double-click on the zip file again and it will open as normal and you will be able to view/ extract your files from there.

“Why are my Excels a .CSV file and how do I change to .XML?”

There are many types of format of Excel spreadsheets widely used, depending on which operating system you are using. Exporting from Green, the system defaults the format to a .CSV file.

If you wish to convert to another file type such as .XML, .XLSX or .XLS, firstly open the Excel. Next select ‘Save As’. Referring to the field near the bottom of the dialogue box, you will have a drop-down available to you labelled ‘Save as type’. Click on the drop-down, where it allows you save the file in your desired format.

Feedback

We are constantly developing Green to ensure the user experience is always improving and we have received some valuable feedback from our customers.

We value and welcome positive and negative feedback, and we take everyone’s comments on board.

Please send any feedback you have on Green to ***bristoloffice@ashdale-engineering.com***.

Tell us:

- What you like/ dislike about Green
- Ideas of how we could improve the experience for you and what features you would like to see in future.