

CONSERVE



SERVICE & MAINTENANCE RECORDS DATABASE

Instructions for Use

Once logged on to this database using your unique user name and password, the following record folders are available for review (see the left hand side of the screen):

Service Calls

Assets

Reports

The system initially defaults to displaying the **Assets** screen.

Click on the folder which has the contents you wish to view. Viewing options and help information follows.

Please ensure that you have 'Pop-Ups' enabled before attempting to retrieve reports on line.

When you are calling up data from large databases the system may be a little slow to react. Please do not repeatedly click on a folder or record.

Service Calls Folder

This folder contains **open (live) calls**, **closed calls** and **cancelled calls** databases. Click on the database you wish to view.

Records are normally displayed in call number order but may be re-ordered, for example chronologically by clicking on the respective column header tab (i.e. logged tab).

There is also a search facility available (see below).

Record types available include PPM (Planned Preventative Maintenance) Calls, Additional Works Calls, Breakdowns/Emergency Calls & Quotations.

Double clicking on a record will provide access to related reports. Double click the report you wish to view.

Please note that you will have to ensure 'pop ups' are temporarily permitted to view reports and report retrieval can take up to ten seconds.

Assets Folder

Clicking on this folder displays all assets under contract. Double clicking on an asset shows all service records relating to that asset. You can view these reports by double clicking the report you wish to view.

Please note you will have to ensure 'pop ups' are temporarily permitted to view reports and report retrieval can take up to ten seconds.

Reports Folder

Clicking on this folder displays reports relating to the Service Contract(s) in place. There are currently two reports available, **Contract Review** and **Refrigerant Usage**.

The **Contract Review** report is an overview of your PPM contract including asset numbers, assets, locations, PPM visit week numbers and engineer codes.

The **Refrigerant Use** report shows refrigerant usage by asset during periods which you can preset.

New Search Facility - Instructions

Select the appropriate search criteria from the **Criteria** field next to the item you wish to search by, in this case **Sitename**:



Search On	Criteria	Search From
Sitename	Begins	
Serial No.	None	
Instument Description	Equals	
Equipemnt Id	Not Equals	
	Begins	
	Contains	
	Range	

Find View

Enter the search criteria into **Search From** field if it is a **Begins, Containing, Equals, Not Equals** search, or into both **Search From** and **Search To** boxes if it is a **Range** search.

Search On	Criteria	Search From
Sitename	Begins	ROYAL P
Serial No.	None	
Instument Description	None	
Equipemnt Id	None	

Click on the **Find** tab

Sitename	Begins
Serial No.	None
Instument Description	None
Equipemnt Id	None
 Find  View	
Sitename	Serial No.