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Welcome

3 Welcome



Welcome to the PATGuard 3 Help file. PATGuard 3 is the ultimate way to record, store and report on a range of health and safety requirements including PAT testing, risk assessments and other workplace tests and inspections. You can tag records with images as visual evidence, schedule retest periods and produce professional reports and certificates for total traceability.

PATGuard 3 is compatible with a wide range of portable appliance testers, including the Seaward <u>Apollo</u> <u>Series</u> instruments. For a full list of compatibility refer to the <u>Tester Compatibility</u> page.

About PATGuard

For more information about PATGuard 3, refer to About PATGuard 3 page.

3 How to use the Help file

To navigate the Help file, click on the links that appear throughout the document to find out more information about a particular topic. You can also navigate the Help file using the built-in Table of Contents or by using the Search function.

Accessing the Help file

The Help files can be accessed by selecting Help Topics from the Help Menu.



Help Topics - Help Menu

Context-sensitive help

For help on a particular topic, the Help file can also be accessed by pressing the **F1** key at any time.

What if I still can't find what I need?

If you have referred to the Help file and are still in need of assistance, please refer to the Support page.

3 Getting Started

For help on getting started, including <u>Installing</u> and <u>Activating</u> PATGuard 3 and <u>Setting up a Database</u>, please refer to the <u>Getting Started</u> section. For help in navigating around the user interface, please refer to the <u>Navigating PATGuard 3</u> section.

Setup Wizard

PATGuard 3 contains a Setup Wizard to help you get up and running. For more information, refer to the <u>Setup Wizard</u> page.

About PATGuard 3

3 About PATGuard 3

- The About Screen
- What's New & Revision History
- PATGuard 3 Versions
- <u>Tester Compatibility</u>

PATGuard 3 offers total traceability when it comes to maintaining portable appliance testing records, enabling images taken with Apollo 600 or any camera or phone to be tagged against sites, locations, asset IDs and test results – providing evidence of visual inspection.

Tagged images can be included in the vast range of reports that PATGuard 3 The Health and Safety Edition can create. These are easily stored, printed or emailed.

A Risk-Based Approach

Universal and electrical risk assessment tools are built into PATGuard 3. These tools ensure a risk-based approach is taken to portable appliance testing; automatically determining retest periods proportionate to risk for assets as required by the IET Code of Practice.

The universal risk assessment tool records details of any workplace hazard, calculating risk scores and scheduling corrective actions has never been simpler.

Complete Health and Safety Management

A range of additional health and safety test and inspection certificates are built into PATGuard 3, allowing records for the inspection of emergency lighting and fire alarm systems to be kept and easily managed.

Compatible with Apollo 600

PATGuard 3 is the ultimate companion for Apollo 600, a total safety management tool. When used with Apollo 600 it is simple to upload and download reports, images, test results and risk assessments to and from the instrument via USB connectivity.

Compatible with Apollo 500 or Apollo 400

PATGuard 3 can used with Apollo 500 to upload and download test results to and from the instrument via USB connectivity. PATGuard 3 can used with Apollo 400 to download test results from the instrument via USB connectivity.

As well as being compatible with all Seaward PAT testers, PATGuard 3 is also suited for use with a range of other manufacturer's testers with download capability. For a full list of compatibility refer to the <u>Tester</u> <u>Compatibility</u> page.

For information on the version / revision of PATguard 3 you are running see the About Screen.

The About Screen

3 The About Screen

To view the About Screen, select the **About PATGuard...** option from the the <u>Help Menu</u>.



About PATGuard - Help Menu

The About Screen displays the <u>version</u> and <u>revision</u> of PATGuard 3 that you are using, along with the <u>Licence Agreement</u>.

About	X
SD SD	PATGuard 3 - Elite Version 3.3.9.3 BETA Copyright (C) 2013 Seaward Electronic http://www.seaward.co.uk
	Software Licence
PAI	This licence agreement (Licence) is a legal agreement between you (you or your) and This Licence

About Screen

To view details about your PATGuard 3 licence, select Licence... from the About Screen.

What's New & Revision History

3 What's New

PATGuard 3 has been completely updated to include:

- A built in universal risk assessment tool
- Ability to determine retest periods using electrical risk assessment tool
- Ability to create and print a range of health & safety certificates
- Compatibility with the <u>Apollo 600</u>, a fast and advanced battery/mains powered tester with on-board camera and large data storage for high volume testing to store images against test results (e.g. visual inspection & failed appliances) for full traceability, complete other health and safety tests and inspection records, and / or use a USB flash drive to transfer data to and from the tester.
- Compatibility with the <u>Apollo 500</u>, a fast and advanced battery / mains powered tester with on-board data storage for high volume testing and the ability to upload assets for faster retesting, and / or have the flexibility to customise user and test settings.
- Compatibility with the <u>Apollo 400</u>, a simple, battery/ mains powered tester with on-board data storage and the ability to include asset details against test records (e.g. description, location, site etc.).

Future updates are free to existing registered PATGuard 3 subscribers.

Revision History

To see which revision of PATGuard 3 you are currently running, refer to the About Screen.

Version 3.4

General

- Add Time Manager 3, with ability to read SSS and gar files.
- Comments lines are stored separately in addition to their usual processing available in the asset list and csv export.
- Auto-scheduler has been updated, remote mode has been removed.
- Upload "Visual Only" check box removed. Upload behaves as if this box is always checked.
- Live-Neutral socket test added to SSS test types.
- Some header labels renamed on Asset List.
- Certificate of Testing considers visual tests when reporting next test date.

Fixes

- When repeatedly downloading the same data, duplicate records were being created.
- Visual next date calculation altered.
- CSV export fixes for Touch Leakage tests.
- Removal of non-working (legacy) options in PAT set up for comments lines (Asset Group, Location and Site).

Version 3.3

General

- Apollo 400 compatibility.
- CSV import template contains next test dates
- "Find" function updated

Reports

- Reports added back in from PATGuard 2 to PATGuard 3 "Asset Barcoded Labels", "Barcode List", "Barcoded Task Checklist", "Concise Test History", "Detailed Test History", "Test Instrument Details", "Client Details", "Personnel Details", "Site Details" and "Test Sequence Details".
- Universal Risk Assessment and Site Reports can now view all site and location assets.

Version 3.2

General

• CSV import function updated

- "Find" function updated
- Custom Reports forgotten after reinstalling PATGuard 3

Version 3.1

General

- Apollo 500 compatibility.
- Customisable main asset view including test results.
- CSV export of Asset view including test results.
- CSV data import.
- Full row double click to open Assets, Hazards and Site Reports.
- 'Upload Test Sequence' function moved to 'Instrument' tab.
- Asset list shown regardless of tree level selection.
- 'In Service' check box and report.
- 'On Hire' information and report.

Reports

• All reports default to "None" for photos.

Version 3.0

Version 3.0 is the initial release version of PATGuard 3.

PATGuard 3 Versions

3 PATGuard 3 Versions

PATGuard 3 is only available in an Elite version. The revision you are currently running can be found on the <u>About Screen</u>.

The features of the Elite version are as follows:

Feature:	PATGuard 3 Elite – The Health & Safety Edition
Rapid manual data entry	V
 Legacy database import from older versions of PATGuard 	\checkmark
 Download compatible with a wide range of testers 	\checkmark
Download photos from Apollo 600	\checkmark
Download risk assessment data from Apollo 600	\checkmark
Download completed health & safety certificates from Apollo 600	V
Preview and correct downloaded test results before processing	V
Built in universal risk assessment tool	\checkmark
 Determine retest periods using electrical risk assessment tool 	V
 Upload tester configuration data to Seaward PATs 	V
 Upload assets for retest to Seaward PATs 	\checkmark
Tag photos to sites, locations, asset IDs and test results	V
Automatic re-test scheduling	\checkmark
Create a read-only file of test records for clients	\checkmark
Includes a comprehensive range of test report certificates	\checkmark
Printable test certificates for each asset	\checkmark
Set-up wizard	\checkmark
In-service indicator and report to keep track of assets	\checkmark
On Hire Indicator and report	
Full test history per asset record	
Repair logging	
Invoice generator Create and print a range of	
 Create and print a range of health & safety certificates Coldians and the same shift with 	V
 CSV import to enable compatibility with existing software and systems (template file included) 	V
 Custom CSV output (including test results) 	\checkmark
Customisable asset view	\checkmark
 Database compatible across PATGuard range 	V
Network enabled	
Certificate of Testing	
Electrical Test Summary Report	\checkmark

Tester Compatibility

3 Tester Compatibility

Download Compatibility

PATGuard 3 Elite can download data from the following testers:

- Apollo 600
- Apollo 500
- Apollo 400
- Europa
- Europa Plus
- Europa PAC Plus
- Europa XE
- Europa XE Plus
- Supernova
- Supernova Elite
- Supernova Plus
- Supernova XE
- Supernova XE Plus
- PrimeTest 300
- PrimeTest 350
- Clare HAL
- Clare HAL Combi
- Clare SafeCheck 8
- Clare SafeTest Luminaire
- Clare SafeTest Manufacturing
- Emona Maestro
- PAT1000
- PAT1000S
- PAT1000X
- IT1000
- PAT2000
- PAT2000i
- PAT2000iee
- SEN60204
- Avo PAT4*
- Avo PAT4F*
- Robin SmartPAT 5000
- Robin SmartPAT 5500
- MetrohmMicroPAT+
- Metrel OmegaPAT
- Metrel BetaPAT
- Ethos 9600
- Ethos 9500
- Ethos 9300



* Requires dow nload through the Parallel Port via a Parallel to Serial Adaptor, not available from Seaw ard. Contact Avo for dow nload cable and adaptor requirements.

Upload Compatibility

PATGuard 3 Elite can upload data to the following testers:

- Apollo 600
- Apollo 500
- Europa
- Europa Plus
- Europa XE
- Europa XE Plus
- PrimeTest 300
- PrimeTest 350
- Supernova
- Supernova Elite
- Supernova Plus
- Supernova XE
- Supernova XE Plus
- IT1000
- PAT2000i
- PAT2000iee
- Ethos 9500
- Ethos 9600
- Emona Maestro

For specific information about your tester, please refer to your tester instruction manual.

Getting Started

3 Getting Started

Once you have reviewed the <u>Licence Agreement</u> and are ready to install PATGuard 3, follow the steps below to get started:

Installing PATGuard 3

- Installing on a Standalone PC
- Installing on a Network Server
- Installing on a Network Workstation

Activating PATGuard 3

- <u>Activate Online</u>
 - o Entering Proxy Server Details
- <u>Activate by Email or Fax</u>
- Evaluation Period

Setup Wizard

- <u>Setting up a Database</u>
 - o Create a New Database
 - o Select an Existing Database
 - o Import a Legacy Database
- Setup Options
 - o Company Details
 - o <u>User Accounts</u>
 - o <u>PAT Options</u>
 - Code Abbreviations
 - o Asset Groups

Click on the links above for more information about each option.

If you encounter problems getting started with PATGuard 3, please refer to the Support page.

Installing PATGuard 3

Installing PATGuard 3

Once you have reviewed the <u>Licence Agreement</u> and are ready to install PATGuard 3, select an option from below to learn more about installing PATGuard 3 on your system:

Installing PATGuard 3

- Installing on a Standalone PC
- Installing on a Network Server
- Installing on a Network Workstation

Click on the links above for more information about each option.

If you encounter problems installing PATGuard 3, please refer to the <u>Support</u> page.

Installing on a Standalone PC

Installing on a Standalone PC

Once you have downloaded PATGuard 3, double-click the downloaded file to install PATGuard 3 on your system. Click **Next** > on the following screen to start the installation process.



Installation Screen 1

Review the <u>Licence Agreement</u> and click **Next >** to continue.



Installation Screen 2

For a standalone PC select Standalone PC and click Next > to continue.



Installation Screen 3

Either leave the installation directory as the default or change it if you wish and click **Next >** to continue.



Installation Screen 4

Click **Next >** to continue.



Installation Screen 5

You will be asked to confirm you options. Click Install to continue.

j ³ Setup - PATGuard 3	
Ready to Install Setup is now ready to begin installing PATGuard 3 on your computer.	3
Click Install to continue with the installation, or click Back if you want to review or change any settings.	
Destination location: C:\Program Files (x86)\Seaward\PATGuard 3 Additional tasks: Additional Icons Create Desktop Icon	۸ ۲
•	·
< Back Install	Cancel

Installation Screen 6

You will be shown the progress of the installation.



Installation Screen 7

When the installation has finished, click Finish to launch PATGuard 3.



Installation Screen 8

PATGuard 3 will now start and the Login screen appear. Click **OK** to launch PATGuard 3.

Installing on a PC without internet access

To install on a PC without internet access, you will first need to download the PATGuard 3 installation files on another PC and copy these to a CD or USB memory stick.

If you encounter problems installing PATGuard 3, please refer to the <u>Support</u> page.

Installing on a Network Server

Installing on a Network Server

Once you have downloaded PATGuard 3, double-click the downloaded file to install PATGuard 3 on your system. Click **Next** > on the following screen to start the installation process.



Installation Screen 1

Review the <u>Licence Agreement</u> and click **Next >** to continue.



Installation Screen 2

For a network Server select **Network Install** and click **Next >** to continue.

📴 Setup - PATGuard 3
Install Type Please choose installation type.
If you want to use PATGuard on a single computer select Standalone PC. To use in a networked environment select Network Install (Network install cannot be installed to Program Files)
 Network Install Standalone PC
< Back Next > Cancel

Installation Screen 3

Select an installation location that is accessible to other computers on your network. Click **Next >** to continue.

🕞 Setup - PATGuard 3	
Select Destination Location Where should PATGuard 3 be installed?	3
Setup will install PATGuard 3 into the following folder.	
To continue, dick Next. If you would like to select a different folder, dick	Browse.
C:\PATGuard 3_Network_Install\PATGuard 3	Browse
At least 97 2 MP of free disk space is required	
At least 87.3 MB of free disk space is required.	
<back next=""></back>	Cancel

Installation Screen 4

Follow the remaining on-screen instructions to install PATGuard 3 on your network Server.

If you encounter problems installing PATGuard 3, please refer to the <u>Support</u> page.

Installing on a Network Workstation

Installing on a Network Workstation

To install PATGuard 3 on a network Workstation, browse to the location specified when you installed on a network Server. Locate and run the file *netsetup.exe* to install PATGuard 3 on a network Workstation. Click **Next >** on the following screen to start the installation process.



Installation Screen 1

Review the <u>Licence Agreement</u> and click **Next >** to continue.

🔁 Setup - PATGuard 3
License Agreement Please read the following important information before continuing.
Please read the following License Agreement. You must accept the terms of this agreement before continuing with the installation.
Seaward Electronic Limited
Software Licence
IMPORTANT NOTICE - PLEASE READ THESE TERMS
CAREFULLY BEFORE INSTALLING THE SOFTWARE.
This licence agreement (Licence) is a legal agreement between 💌
I accept the agreement
I do not accept the agreement
< Back Next > Cancel

Follow the remaining on-screen instructions to install PATGuard 3 on your network Workstation.

If you encounter problems installing PATGuard 3, please refer to the <u>Support</u> page.

Activating PATGuard 3

3 Activating PATGuard 3

Once you have installed PATGuard 3 you will see the Activation screen. You can choose to either Activate PATGuard 3 or continue using the 30 day <u>Evaluation Period</u>.

Activation of PATGuard3	X						
J	Thank you for your interest in this product						
	Serial Number required						
Notice: This is the complete application. You don't have to download or install it again.	To further use this product you have to activate it by entering a Serial Number.						
	You don't have a Serial Number?						
	Buy a Serial Number						
0	Next End						

Activation Screen

If you have already purchased PATGuard 3 and wish to activate it now you can choose to:

- <u>Activate Online</u>
- <u>Activate by Email or Fax</u>

You will need to have your serial number available to activate PATGuard 3. If you do not have a serial number, you can select **Buy a Serial Number** to purchase one.

You can also choose to make use of the 30-day Evaluation Period and activate PATGuard later.

If you encounter problems activating PATGuard 3, please refer to the <u>Support</u> page.

Activate Online

3 Activate Online

To activate PATGuard 3 online, select **I have a Serial Number and I want to activate PATGuard 3** and click **Next** on the Activation screen. You will need to have your serial number available to activate PATGuard 3. If you do not have a serial number, you can select **Buy a Serial Number** to purchase one.



Activation Screen 1

Select Online Activation on the following screen and click Next.



Activation Screen 2

Enter your details on the following screen and click Next.

Activation of PATGuard3					23
3		Please	enter the a	activation	data
	Serial Number	Where do v	ou find your Serial N	lumber?	
Please enter all required information for the activation process.	Customer Number Company	F			
	Salutation First Name				
	Last Name				
	Country	United	Kingdom		•
	E-Mail Address				
0		Back	Next	En	d

Activation Screen 3

PATGuard 3 is now ready to activate PATGuard 3. If you use a proxy server to access the internet you will need to enter these details on the following screen by clicking **Change Proxy Settings (only for expert users)**. See <u>Entering Proxy Server details</u> if required, otherwise click **Next**.



Activation Screen 4

PATGuard 3 will now connect to the Activation Service.



Activation Screen 5

The following screen will be displayed when Activation is completed successfully. You will not need to enter multiple Activation Keys unless requested to. Click **Next** or **End** to close the Activation Screen.



Activation Screen 6

If you encounter problems activating PATGuard 3, please refer to the <u>Support</u> page.

Entering Proxy Server Details

Entering Proxy Server Details

If you use a Proxy Server to access the internet, you will need to enter these details into the activation screen. Select **Change Proxy Settings (only for expert users)**. By default the Proxy Server settings will be the same as those set in Internet Explorer. To change the Proxy Server settings, select **Use Proxy Server** and enter the details in the **Proxy Server** and **Proxy Port** boxes.



Proxy server details

If you encounter problems activating PATGuard 3, please refer to the Support page.

Activate by Email, Fax

3 Activate by Email or Fax

The quickest way to activate PATGuard 3 is to <u>Activate Online</u>. However if you do not have an internet connection, you may choose to Activate by Email or Fax.

To activate PATGuard 3 by Email or Fax select I have a Serial Number and I want to activate PATGuard 3 and click Next on the Activation screen. You will need to have your serial number available to activate PATGuard 3. If you do not have a serial number, you can select **Buy a Serial Number** or contact Seaward or your Distributor to purchase one.



Activation Screen 1

Select E-Mail Activation or Fax Activation on the following screen and click Next.



Activation Screen 2

Enter your details on the following screen and click **Next**. Note, if you have an electronic version of your Serial Number (for example in an email) it is easier if you cut and paste to enter this.

Activation of PATGuard3				X	3
BAT GUARD	Serial Number	F	enter the a	activation dat	a
Please enter all required information for the activation process.	Customer Number Company Salutation First Name Last Name Country E-Mail Address	United	d Kingdom		
0		Back	Next	End	

Activation Screen 3

Follow the instructions provided to finish the activation process. Unlike <u>Activating Online</u>, you will be provided with an Activation Key that you will need to enter to complete the process..

If you encounter problems activating PATGuard 3, please refer to the <u>Support</u> page.

Evaluation Period

3 Evaluation Period

PATGuard 3 can be used as a free trial for a period of 30 days. During the Evaluation Period the activation screen will open when you start PATGuard 3 and will display the number of days left in the Evaluation Period.

Note- The evaluation period is not applicable for Time Manager 3, if you require an evaluation for this product please contact our Customer Care team on <u>customercare@seaward.co.uk</u>.



Activation Screen - Evaluation

Once the evaluation period is over PATGuard 3 will revert to a read-only mode and you will not be able to add to or amend the database until you <u>Activate PATGuard 3</u>.

If you have already purchased PATGuard 3 and wish to activate it now you can choose to:

- <u>Activate Online</u>
- Activate by Email or Fax

If you encounter problems activating PATGuard 3, please refer to the Support page.

Setup Wizard

Setup Wizard

The Setup Wizard runs the first time PATGuard 3 starts, and can also be accessed by clicking **Setup Wizard** in the <u>Help Menu</u>.



Setup Wizard - Help Menu

The Setup Wizard will first guide you through the process of <u>Setting up a Database</u>. It will then take you to the <u>Setup</u> screen to allow you to enter your <u>Company Details</u>, add <u>User Accounts</u>, and configure <u>PAT</u> <u>Options</u> and <u>Asset Groups</u>.

Please continue to the <u>Setting up a Database</u> page.

Setting up a Database

3 Setting up a Database

The first step in the <u>Setup Wizard</u> is Setting up a Database, which will be used to store all of your PATGuard 3 data.

Welcome	X
PATGUARD 3	Welcome to PATGuard 3 - Elite! The setup wizard will now guide you through the steps necessary to get started with Seaward PATGuard 3 - Elite. The first step is to create a new database. The options for doing this are listed below. Please make your choice now. © Create a new database © Select an existing database
	For Help, press F1. Next > Cancel

Setup Wizard

The Setup Wizard gives three options for Setting up a Database:

- Create a new database
- Select an existing database

Your choice will depend on whether you already have a PATGuard database that you wish to use or if you wish to start from a blank database.

Click on the links above for more information about each option.

Create a New Database

3 Create a New Database

If you do not have an existing PATGuard database that you want to use, this is the option for you. If it is not, see <u>Select an existing database</u>.

Welcome		23
	Welcome to PATGuard 3 - Elite! The setup wizard will now guide you through the steps nece to get started with Seaward PATGuard 3 - Elite. The first step is to create a new database. The options for o this are listed below. Please make your choice now. © Create a new database © Select an existing database	
	For Help, press F1. Next > Can	icel

Create a new database - Setup Wizard

Enter New Database Name

After selecting **Create a new database** and clicking **Next**, the first step is to browse to the location you wish to store your database and enter a filename for the new PATGuard 3 database in the Enter New Database Name window.

Enter New Database	e Name					23
🖉 🗸 📕 🕨 🖓	TGuard 3				✓ 4 Search PATGuard 3	1
Organize 👻 Ne	w folder)H •	. 0
Name	^	Date modified	Туре	Size		
			No items matc	h your search.		
File name:						
	Databases (*.mdb)					
Hide Folders					Save Ca	ncel

Enter new database name

After clicking **Save** the <u>Setup Wizard</u> will take you to the <u>Setup</u> options window.

Please continue to the <u>Setup</u> page.

Select an Existing Database



If you have an existing PATGuard database that you want to use, this is the option for you. If it is not, see <u>Create a new database</u>.

Welcome	23	Л
PATGUARD 3	Welcome to PATGuard 3 - Elite! The setup wizard will now guide you through the steps necessary to get started with Seaward PATGuard 3 - Elite. The first step is to create a new database. The options for doing this are listed below. Please make your choice now. © Create a new database © Select an existing database	
	For Help, press F1. Next > Cancel	

Select an existing database - Setup Wizard

Select existing database

After selecting **Select an existing database** and clicking **Next**, the first step is to browse to the location where your existing database is stored.

Select Existin	g Database					22
0	 PATGuard 3 				✓ 4y Search PATGu	ard 3 🔎
Organize 🔻	New folder				l	- I O
Name	[^]	Date modified	Туре	Size		
			No items match ye	our search.		
	File name:					ib) 🔹
					Open 🗸	Cancel
						.el

Select Existing Database

After selecting the existing database you wish to use and clicking **Open**, the <u>Setup Wizard</u> will take you to the <u>Setup</u> options window.

Please continue to the <u>Setup</u> page.
Upgrading / Importing a Legacy Database

Upgrading / Importing a Legacy Database

These instructions are generally intended to be used once and will allow the upgrade of an old database into PATGuard 3. How your original database is formatted will determine which method you need to use to import data into PATGuard 3.

Method 1: Upgrading PATGuard 1 or PATGuard 2 Databases

If the database is one .mdb file, such as PATGuard 1 or PATGuard 2, then it should simply open in PATGuard 3.

Note 1; before upgrading an older database, .mdb file, we suggest you make a copy of the file first as after it has been upgraded to PATGuard 3 it cannot be rolled back to a previous version.

Note 2; whilst performing the upgrade you may receive warning messages during the process, accept these and continue.

Method 2: Upgrading an Older PATGuard Database

If the database is one .mdb file, such as PATGuard 1 or PATGuard 2, then see Method 1.

However, if the database is in an older version of PATGuard then this may need to be imported via PATGuard 2 first. The PATGuard 2 Elite program allows data from existing PATS/PATS+, Safety 1st/Safety 1st+, PATSwin and Safety 1st Xpress databases to be imported into the PATGuard 2 Elite program.

Note; Only PATS/PATS+, Safety 1st/Safety1st+ version 5.4 or higher , PATSwin version 2 and Safety 1st Xpress v1.0.7.4 can be imported.

If your database is in the list above, please see page 21 of the manual (link below) for instructions on how to import into PATGuard 2 – if this is successful you will need to import into PATGuard 2 then PATGuard 3 (see Method 1).

http://www.seaward.co.uk/downloads/PATGuard%20Elite%202%20User%20Manual.pdf

For a trial copy of PATGuard 2, please see the following: http://www.seaward.co.uk/software/PATGuard 2.1 Evaluation.exe

Method 3: Importing an Older PATGuard Database / a Database in Another Format

If your database format does not allow either Method 1 or 2 to be used, then your only other option is to try a spreadsheet CSV import.

For help regarding this see Import CSV.

Setup Options

3 Setup Options

The <u>Setup Window</u> forms part of the <u>Setup Wizard</u> but can also be accessed by clicking **Setup** in the <u>File</u> <u>Menu</u>.



File Menu

Company:	Accounts PA		Groups	
Address:				
Address:		Tel:		
Town/City:		Fax:		
County:		Email:		
Postcode:				
Logo (.jpg): C:\Progra	m Files\Seawar	d\PATGuard 3\rep	orts\S Brows	e
VAT reg. no.:				
Company reg. no.:				
Hint: These com	oany details will	appear on any repo	orts you generate	

Setup Window

Setup Window

The Setup Window allows you to configure the main PATGuard 3 options, including:

- <u>Company Details</u>
- User Accounts
- PAT Options
 - o <u>Code Abbreviations</u>
- <u>Asset Groups</u>

Please click on the links above for more information about each option.

Company Details

3 Company Details

The Company Details tab in the <u>Setup Window</u> allows you to enter your company details, including address information, phone number, email address and VAT and Company registration numbers. These details will appear on any <u>Reports</u> that you generate.

Company Det	PAT Lt		Options Ass	et Groups
Company:		u		
Address:	PAT Lt	d HQ		
	An Ind	ustrial Estate	Tel:	0122345678
Town/City:	North o	f Watford Gap	Fax:	0122345679
County:			Email:	jane@pat.co.uk
Postcode:	NE1 2BE			
Logo (.jpg):	1 Files∖	Seaward\PATGuard 3	3\reports\sea	ward.jpg Browse
VAT reg. no).:	0123456789		
Company re	g. no.:	9876543210		
Hint: T	hese co	mpany details will app	ear on any re	eports you generate

Setup - Company Details

Company Logo

The Company Details tab in the <u>Setup Window</u> also allows you to select a company logo to display on any <u>Reports</u> that you generate. To do this, click the **Browse...** button and browse to the location of the logo you wish to use.

3 Open				8
Seaward > PA	ATGuard 3 ► appData ► reports ►	▼ 47	Search reports	٩
Organize 🔻 New folder				
 ★ Favorites ■ Desktop Downloads ▲ OneDrive ③ Recent Places 	E Restore	Seaward.jpg		
File name:	seaward.jpg	•	Images (*.jpg) Open 🖌	▼ Cancel

Setup - Browse for new logo

Once you have selected the image you would like to use, click **Open** to return to the Company Details tab.

Note; the .jpg file for a new Company Logo needs to be approximately 399 x 77 pixels and approx. 15kB in size (note we recommend trying to keep the image down to about 15k as if the logo is larger than this it will reduce the maximum number of pages that a report can be composed of).

Please continue to the <u>User Accounts</u> page.

User Accounts

3 User Accounts

The User Accounts tab in the Setup Window allows you to Add, Edit and Delete users of PATGuard 3.

tup		23
Company Details	User Accounts PAT Options	Asset Groups
Name	Password	Permissions
Admin		View, Add, Edit, Delete
Add	Edit	Delete Cancel Apply

Setup - User Accounts

Add new user

To add a new user, click the Add.. button in the User Accounts tab in the Setup Window.

	22
Jane	
SeCuRe	
View, Add	-
ОК	Cancel
	SeCuRe View, Add

Add New User

Each user has a user name, an optional password and a Permissions level.

Edit a user

To edit a user, select the user name in the <u>User Accounts</u> tab in the Setup Window and click the **Edit...** button.

Delete a user

To delete a user, select the user name in the User Accounts tab in the Setup Window and click the Delete

button.

Admin user

The default Admin account cannot be renamed, deleted or have the <u>Permissions level</u> changed. It is strongly recommended that a password is set for the Admin account to prevent unauthorised access.

Permissions level

There are five options for the Permissions level for PATGuard 3 that limit access to various aspects of PATGuard 3 functionality.

User	×
User:	User
Password:	PaSsWoRd
Permissions:	View
	View, Add, Edit, Delete, Setup View, Add, Edit, Setup View, Add, Edit View, Add
	View

Permissions Level

The most limited Permissions level is **View**, which allows a user to look at but not edit the database. The highest permissions level is **View**, **Add**, **Edit**, **Delete**, **Setup**, which is the same permissions level as the default <u>Admin user</u>.

Please continue to the PAT Options page.

PAT Options

3 PAT Options

The PAT Options tab in the <u>Setup Window</u> allows you to set the <u>Tester Output</u> options and to configure <u>Code Abbreviations</u> for use on your tester.

PATGuard 3

Setup 🛛 🕅
Company Details User Accounts PAT Options Asset Groups
Tester Output
Text Line 1: Asset Description Text Line 3: Location
Text Line 2: Asset Group Text Line 4: Person
Use code abbreviations on tester Show codes for: Asset Description
Code Represents
Hint: Save typing on the TESTER by entering abbreviations prefixed by 9. Setup your abbreviations here but DO NOT include the 9 in this table.
Add Delete
OK Cancel Apply

Setup - PAT Options

Tester Output

The Tester Output drop-down boxes are used to configure the interpretation of the data <u>downloaded</u> from your test instrument. With the exception of the *Notes* option, all fields are mutually exclusive - in other words you cannot set more than one field to *Asset Description*.

Note that for test instruments that use the .gar file/SSS download format, the *Site*, *Location* and *Person* information in the download will override the options configured in the PAT Options tab.

Please refer to the manual for your test instrument to determine the default Tester Output and other download options.

Code Abbreviations

See the <u>Code Abbreviations</u> page for more information on Code Abbreviations.

Code Abbreviations

3 Code Abbreviations

Code Abbreviations are used to help save time typing on the test instrument. If you wish to use Code Abbreviations on your test instrument, and your test instrument is able to use Code Abbreviations, tick the **Use code abbreviations on tester** box in the <u>PAT Options</u> tab.

When this option is enabled text prefixed with a **9** (nine) will be checked against the list of Code Abbreviations and, if found, the Code Abbreviation will be expanded. In the example below, *9KET* would expand to Kettle, *9TOA* to Toaster etc.

Setup	22
Company Details User Accounts PAT O	ptions Asset Groups
Tester Output	
Text Line 1: Asset Description -	Text Line 3: Location
Text Line 2: Asset Group	Text Line <u>4</u> : Person ▼
Use <u>c</u> ode abbreviations on tester	Show codes for: Asset Description
Code	Represents
KET Kettle	
TOA	Toaster
MIC	Microwave
Hint: Save typing on the TESTER by ente Setup your abbreviations here but DO NO	
	Add <u>D</u> elete
	OK Cancel Apply

Code Abbreviations

Code Abbreviation Category

Code Abbreviations can be set up for various categories including *Asset Description, Location* and *Person.* To display the available categories and the Code Abbreviations for each, click on the **Show Codes for:** drop-down box.

Use <u>c</u> ode abbreviations on tester	Show codes for:	Asset Make 👻
Code	Represents	Asset Description Asset Group
		Asset Make Asset Model Location Person Repair Site

Code Abbreviation Fields

Adding a new Code Abbreviation

To add a new Code Abbreviation, select the <u>Code Abbreviation Category</u> that you would like to add a new Code Abbreviation to. Click the **Add** button to add a new line.

Use <u>c</u> ode abbreviations on tester	Show codes for: Asset Description
Code	Represents
KET	Kettle
MIC	Microwave
TOA	Toaster

Add a new Code Abbreviation

In the new line, enter the 3-digit Code you would like to use in the *Code* column. The **9** should not be included for the Code in the Code Abbreviation table. Enter the full description in the *Represents* column.

Editing a Code Abbreviation

To edit either the Code Abbreviation or the full description, simply click in the Code Abbreviations table and edit the text accordingly.

Deleting a Code Abbreviation

To delete a Code Abbreviation, select the row containing the Code Abbreviation and hit the **Delete** button. You will be prompted for confirmation.



Delete Code Abbreviation

Asset Groups

3 Asset Groups

An Asset Group defines the test parameters and retest periods for a class of Assets. By defining Asset Group and assigning Assets to a group you can manage the retest periods and test codes for many Assets at once. In addition to the <u>Pre-defined Asset Groups</u>, Asset Groups can also be <u>Added</u>, <u>Edited</u> or <u>Deleted</u>.

Setup 23
Company Details User Accounts PAT Options Asset Groups
Type of Premises: Offices and Shops
Office Hand-held Equipment (Class I) Office Hand-held Equipment (Class II) Office IT Equipment (Class I) Office IT Equipment (Class II) Office Movable Equipment (Class II) Office Portable Equipment (Class I) Office Portable Equipment (Class II) Office Stationary Equipment (Class I) Office Stationary Equipment (Class II)
Add Edit Delete
OK Cancel Apply

Setup - Asset Groups

Pre-defined Asset Groups

In the UK, the Health and Safety Executive (HSE) and the Institute of Engineering and Technology (IET) define re-test periods in their documentation. These re-test periods are defined in terms of the <u>Type of</u> <u>Premises</u> where the Assets are located, the type of equipment, type of test (visual or full test) and the class of the equipment (class I or class II).

PATGuard 3 contains a set of pre-defined Asset Groups based on this guidance. Other Asset groups which are not premise dependent can be <u>added</u> to Undefined (e.g. Imported Asset Groups or equivalent from another database will be in Undefined).

Type of Premises

PATGuard 3 contains a list of Premises Types, each containing a number of <u>pre-defined Asset Groups</u>. These Asset Groups can be accessed by selecting the Premises Type from the **Type of Premises** dropdown box.

< Undefined >
 Undefined > Construction sites 110V equipment Industrial inc.commercial kitchens Equipment used by the public Schools Hotels Offices and Shops

Type of Premises

Adding an Asset Group

To add a new Asset Group, first select the <u>Type of Premises</u> that you want the Asset Group to belong to, or use the < Undefined > premises type, and then click the **Add...** button to pull up the Asset Group window.

Asset Group				23
Description:	Office New Asse	et Group)	
Class	ε.	Class	-	
Volta	ge:	230V	•	
Defa	ult Test Period:	1	Years 🔻	
Defa	ult Visual Period:	6	Months 🔻	
Defa	ult Test Code 1:			
Defa	ult Test Code 2:			
			ОК	Cancel

Add Asset Group

Enter the description of the Asset Group and select the applicable *Class* and *Voltage*. The *Default Test Period* and *Default Visual Period* allow you to set the default test periods for this asset group, which will be used whenever **Group Default** is selected for Test Period in the <u>Asset Details</u> window.

Default Test Codes can also be entered to instruct your test instrument how to test this group of assets, if your test instrument supports Test Codes. *Please refer to your test instrument manual for more information on Test Codes.*

Edit an Asset Group

To edit an Asset Group, select the Asset Group name in the <u>Asset Groups</u> tab in the Setup Window and click the **Edit...** button. This will open the Asset Group window.

Delete an Asset Group

To delete an Asset Group, select the Asset Group name in the <u>Asset Groups</u> tab in the Setup Window and click the **Delete** button. You will be prompted for confirmation.

PATGuard3	Σ	3
?	Are you sure you want to permanently delete the selected asset group(s) from the database?	
	OK Cancel	

Delete Asset Group

Navigating PATGuard 3



- The Title Bar
- <u>The Ribbon</u>
- <u>The Navigating Pane</u>
- <u>Main Window</u>
- Short-cut Keys

The PATGuard 3 user interface is split into four main areas, the <u>Title Bar</u>, <u>Ribbon</u>, <u>Navigation Pane</u> and <u>Main</u> <u>Window</u>, as shown below. The relative size of the Navigation Pane and Main Window can be adjusted by clicking and dragging the dividing bar with the mouse.



Title Bar

PATGuard 3

The Title Bar

The Title Bar contains the <u>Quick-access Toolbar</u> as well as <u>Minimise</u>, <u>Maximise and Close</u> buttons.

For more information, see the <u>Title Bar</u> page.

Ribbon

The Ribbon provides access to the <u>File</u>, <u>Data Transfer</u>, <u>Functions</u> and <u>Help</u> menus along with the <u>Style</u> options.

For more information, see the <u>Ribbon</u> page.

Navigation Pane

The Navigation Pane provides access to the various main PATGuard 3 functions, including <u>PAT Testing</u>, <u>Universal Risk Assessment</u>, <u>Site Reports</u>, the <u>Address Book</u>, <u>Reports</u> and <u>Instruments</u>. The Navigation Pane also contains the database <u>Tree View</u>. The Navigation Pane can be <u>customised</u> to hide some of these features if they are not required.

For more information, see the Navigation Pane page.

Main Window

The contents of the Main Window depend on which <u>PATGuard 3 function</u> is selected. For example, when using the <u>PAT Testing</u> function, the Main Window displays details of the stored assets and test results.

For more information, see the Main Window page.

Short-cut Keys

There are also a number of short-cut keys in PATGuard 3 to help make common tasks quicker.

For more information, see the Short-cut Keys page.

The Title Bar

Ite Title Bar

The Title Bar is at the top of the PATGuard 3 user interface and contains the <u>Quick-access Toolbar</u> as well as the <u>Minimise, Maximise and Close</u> buttons.

Quick-access Toolbar



Title Bar

Quick-access Toolbar





Quick-access Toolbar

The icons on the Quick-access Toolbar provide options to Create a new database or Open an existing file.

Minimise, Maximise and Close buttons

			-	x	
Minimise	Max	imise	and	Close	buttons

The minimise and maximise buttons allow the user to minimise and maximise/restore the PATGuard 3 window. The close button closes PATGuard 3.

Context Menu

Right-clicking on the Title Bar brings up the Context Menu:



The context menu provides options to move, resize, minimise, maximise/restore and close PATGuard 3.

The Ribbon

Ite Ribbon

The Ribbon provides access to the File, Data Transfer, Functions and Help menus.

The Ribbon also contains the <u>Application Button</u>, the <u>Style Options</u> menu and a link to the <u>About Screen</u>.



Application Button

About

The Ribbon

Application Button



Application Button menu

The Application Button opens a menu with options to <u>Create a new database</u> or <u>Open an existing file</u>. The menu also shows a list of recent documents that are available to open, along with an Exit button.

Minimising and Maximising the Ribbon

The Ribbon can be minimised by double-clicking one of the Menu names (<u>File</u>, <u>Data Transfer</u>, <u>Functions</u> or <u>Help</u>). This will hide the Menu bars unless one of the Menu names is selected, and can be useful on low resolution screens

Double-clicking on a Menu name will maximise the Ribbon.

File Menu

File Menu



The File Menu contains the following options:

- <u>New Database</u>
- Open File
- <u>Setup</u>

- Add Client
- Add Site
- Add Location
- Add Asset/Add Hazard (depending on context)
- <u>Find</u>
- Find Next
- Asset View Filter
- Last Download Only
- Auto Schedule

Click on the links above for more information about each option.

Condensed View

If there is not enough space to display the entire menu, the File Menu - and other Ribbon menus - automatically condense themselves to save space, as shown below:



File Menu - condensed view

The hidden options can be accessed, in this case, by clicking on the 'View' button:



File Menu - condensed view (expanded)

Open an Existing File

3 Open An Existing File

To open an existing file or database, select **Open File** from the <u>File Menu</u> (or from the <u>Quick-access</u> <u>Toolbar</u> or <u>Application Button</u>).



5 Open					×
😌 🕘 - 📕	Documents Documents	Guard 3	▼ 4 ₇	Search PATGuard 3	P
Organize 🔻	New folder			8≡ ▼	
Name	^	Date modified	Туре	Size	
		No items match your	search.		
	File name:		•	Databases (*.mdb)	•
				Open	Cancel

This will open the Open File window, which allows you to browse to the file you wish to open.

Open File window

File Types

The Open File window allows you to open files of different types.

File <u>n</u> ame:	✓ Databases (*.mdb) ✓
	Databases (*.mdb)
	Downloads (*.sss)
	Downloads (*.txt)
	Downloads (*.gar)
	Briefcase files (*.pat)
	All Files (*.*)

Open File - File Type Options

Opening a Database (.mdb) will close the database that is currently in use and open the selected database.

Opening a Briefcase (.pat) file will import the data in the selected file into the current database.

Note; briefcase / .pat files can only be opened on exactly the same version of PATGuard 3 that they were originally created on.

Opening any of the Downloads options (.sss, .txt, .gar) files will import the data in the selected file into the current database.

Find Find

To search for assets matching particular criteria, select the **Find** option from the File Menu.

Find Next	Asset View Filter	Last Download Only	Auto Schedule *	Time Manager
112/12	The first finder		Serreduie	manager
		View		

File Menu - View - Find/Find Next

The fields in the Find window are used to define the search criteria. You can search by <u>Site</u>, <u>Location</u>, Asset ID, Description, <u>Asset Group</u>, Serial Number or Next Check Date.

You must select at least one search criteria but the other fields may be left blank. Click **OK** to begin the search.

ind			X
Site Name:	< Any >		•
Location Name:	< Any >		•
Asset ID:]
Description:			•
Asset Group:	< Any >		•
Serial No.:]
Next Check Date:	03/07/2013]
		OK	Cancel

Find Window

The search criteria given must ALL be present in an asset for a match to occur. If a matching asset is found the <u>Tree View</u> will display its location and the asset will be selected in the <u>Asset View</u>.

Find Next

Select the **Find Next** option in the <u>File Menu</u> to continue the search. If another match occurs, the <u>Tree View</u> will display the location of the next asset and the asset will be selected in the <u>Asset View</u>. You can also find the next match by pressing the **F3** key.

If no more matches occur, the following message will be displayed:

PATGuard	l	23
1	Failed to find any matchi	ng assets
		ОК

Find - No Matching Assets

Asset View Filter

3 Asset View Filter

To filter the <u>Asset View</u> for assets with particular next test dates, select the **Asset View Filter** option from the <u>File Menu</u>.

	Find	Find Next	Asset View Filter	Last Download Only	Auto Schedule *	Time Manager
l				View		

File Menu - View - Asset View Filter

To filter the <u>Asset View</u> by next test date, tick the **Filter asset view by next test date** box and then change the **From** and **To** dates according to your requirements.

Alternatively, to view all assets that have tests overdue, tick the **Show all assets that have tests overdue** box. This will disable the From and To date boxes.

If you wish to include visual tests, tick the Include Visual Tests in Schedule box.

Filter	asset view by ne	xt test date	
From:	13/11/2017	To:	13/11/2017
Sho	w all assets that h	ave tests ov	erdue

Asset View Filter window

Clicking **OK** will apply the Asset View Filter, and only assets matching the filter will be displayed in the <u>Asset View</u>.

Last Download Only

3 Last Download Only

To filter the Asset View so that only assets added or modified by the last download appear, select the Last

Download Only option from the File Menu.



File Menu - View - Asset View Filter

Only the assets added or modified by the last download will appear in the <u>Asset View</u>. Selecting **Last Download Only** again removes the filter so that all assets can be seen. Newly created assets are

differentiated from modified assets by a 🗯 icon.

Using the Last Download Only function overrides any previously applied Asset View Filter.

Data Transfer Menu

3 Data Transfer Menu



Data Transfer Menu

The Data Transfer Menu contains the following options:

- Data Transfer
 - o Download from Your Tester
 - Uploading to Your Tester
- Export to File
 - Export to File PAT
 - Export to File CSV
- Email File
 - o Email File PAT
 - o Email File CSV
- Import
 - o Import CSV

Click on the links above for more information about each option.

Functions Menu





Functions Menu

The Functions Menu contains the following options:

- <u>Auto Scheduler</u>
- Add Formal Test Visual Pass
- Add Manual Test Result
- Emergency Lighting
- Fire Alarm
- <u>Create PATGuard Viewer CD</u>
- PAT Risk Assessment
- Universal Risk Assessment

Click on the links above for more information about each option.

Add Formal Visual Test Pass

3 Add Formal Visual Test Pass

The Add Formal Visual Test Pass feature allows you to add a visual test pass to the <u>Test Results</u> for one or more <u>Assets</u>.

To add a Formal Visual Test Pass to one or more Assets, make sure you are using the <u>PAT Testing</u> function and select the Asset or Assets you wish to add a Formal Visual Test Pass to in the <u>Main Window</u>.

📥 Description	Asset ID	Last Full Test Date	Next Full Test Date	Last Formal Visual Inspection Date	Next Formal Visual Date
🥪 Kettle	Kettle			14/11/2017	14/05/2018
🥝 Laptop	Laptop			14/11/2017	14/05/2018
Microwave	Microwave			14/11/2017	14/05/2018
🤣 Monitor	Monitor			14/11/2017	14/05/2018
🥝 Toaster	Toaster			14/11/2017	14/05/2018
📀 TV	TV			14/11/2017	14/05/2018

Selecting multiple Assets in the Main Window

Select Add Formal Visual Test Pass from the Functions Menu.



Functions Menu - Add Formal Visual Test Pass

You will be prompted for confirmation.



Add Formal Visual Test Pass confirmation

Selecting **OK** will add a visual test pass with the current date to the test results for the selected Asset or Assets.

Add Manual Test Result

3 Add Manual Test Results

The <u>Add Manual Test Result</u> feature allows a manual test result to be added to an <u>Asset</u> that is already in the database.

To add a Manual Test Result to an Asset, make sure you are using the <u>PAT Testing</u> function and highlight the Asset you wish to <u>Add Manual Test Results</u> to in the <u>Main Window</u>.



Functions Menu - Add Manual Test Results

Selecting the Add Manual	Test Result butto	on opens the	Asset Detai	ls windows	and the c	orresponding	<u>Test</u>
Details window.							

	et Details _							22
-	Test Details							
Desc	Test Instrument: Serial No.:		 Test Code 1: Test Code 2: 					
Asse	Test Results:				7			>
Site	Test type	Result	Unit	Status Skipped	-			
Loca Full Te Test Pi				экіррец	<<			»
Next D Program	Comments:]	Comment	Default photo	
Formal Test F				-		Atta	achment 0/0	
Next E Progra	Add Result	Delete Result		Cancel]	Add Attachmer	nt Delete Attachment	
Notes.		<< >>>	OK I	Cancel		Add Resul	ts Delete	

Asset Details and Test Details Window

In the **Test Details** window, click on the box under **Test type** and from the dropdown add the test required from the list. The **Result** and **Unit** can be added as free text and finally the **Status** is selected from the dropdown.

Select **OK** to close the Test Details window and save the manually added data.

The date of this manually added result can be changed by selecting the **Date** field, immediately after entry, and selecting the relevant date from the dropdown.

Note; the date cannot be changed on old data / previously added manual data - the date change only works on new manual entries.

Selecting **OK** saves and closes Asset Details window.

Create PATGuard Viewer CD

3 Create PATGuard Viewer CD

PATGuard Viewer is a 'view' only version of the program that can be freely issued to <u>Clients</u> and others so that they can view the database and print their own <u>Reports</u>.

Not all versions of PATGuard 3 can create a Viewer CD, refer to the <u>PATGuard 3 Versions</u> page for more information.

To create a PATGuard 3 Viewer CD, make sure you are using either the <u>PAT Testing</u>, <u>Universal Risk</u> <u>Assessment</u> or <u>Site Reports</u> function. Select the <u>Client</u> you wish to create a Viewer CD for in the <u>Tree View</u> in the <u>Navigation Pane</u>. Only the data for that Client will be added to the Viewer CD. Alternatively, to include the entire database, select the top level of the database in the <u>Tree View</u> in the <u>Navigation Pane</u>.



Select a Client or the top level of the database

Select the Create Viewer CD option from the Functions Menu.



Functions Menu - Create Viewer CD

This will open the Create Viewer CD Image window, which allows you to set the options for your Viewer CD.

Create Viewer CD Image window

Splash screen (.bmp):	F:\Splash.bmp	Browse
Company logo (.jpg):	F:\Logo.jpg	Browse
CD image directory:	F:Wiewer CD	Browse

Create Viewer CD Image window

The PATGuard Viewer CD can be customised by changing the Splash Screen and Company Logo. The Splash Screen appears when the PATGuard Viewer is started, and the Company Logo will appear on all <u>Reports</u> generated with PATGuard Viewer.

Changing Splash Screen

To change the Splash Screen, select **Browse...** next to **Splash screen (.bmp)** to open the Open Splash Screen window.



Open Splash Screen window

Browse to the location of the Bitmap (.bmp) file that you would like to use as the Splash Screen. Select **OK** to select the file and return to the Create Viewer CD Image window.

Changing Company Logo

To change the Company Logo, select **Browse...** next to **Company logo (.jpg)** to open the Open Company Logo window.

PATGu	ard	3
-------	-----	---

🕽 🔵 🗢 🥽 🕨 Librar	ies > • 49 Sear	rch Libraries 👂
Organize 💌		§• 🗆 🛛
🚖 Favorites	Libraries Open a library to see your files and arran	
Documents	Documents Library	
Pictures Videos	Music Library	
🜏 Homegroup	Pictures Library	
P Computer	Videos	
🙀 Network	Library	
Fi	e name: JPEG	images (*.jpg) 🔹
		Open Cancel

Open Company Logo window

Browse to the location of the JPEG (.jpg) file that you would like to use as the Company Logo. Select **OK** to select the file and return to the Create Viewer CD Image window.

Setting CD image directory

To set the folder you would like to output the Viewer CD image to, select **Browse...** next to **CD image directory** to open the Browse for CD image directory window.

Browse for Folder	<u> </u>
Select a directory for the viewer CD image	
C:\Users\Engineering\Desktop\ViewerCD	
🧾 Desktop	
Network	
Libraries	
Engineering	
⊳ 🖳 Computer	
ViewerCD	
OK Can	cel

Browse for CD image directory window

Browse to the location of the folder that you would like to output the CD image files to (in the example above, the previously created ViewerCD folder on the Desktop). Select **OK** to select the file and return to the Create Viewer CD Image window.

NB: The CD image directory should be an empty folder, and never the root directory (e.g. C:\) or any other important system folder.

Creating Viewer CD image

After setting the various Viewer CD options, select Create CD Image to generate the Viewer CD files.



Create Viewer CD Image Created confirmation window

Once the Viewer CD files have been successfully generated, copy all of the generated files onto a blank CD or DVD using your normal CD creating software program.

It is a good idea to check the Viewer CD has been created correctly by installing on your own PC before sending to a <u>Client</u>.

Help Menu





Help Menu

The Help Menu contains the following options:

- About PATGuard 3
- Setup Wizard
- Help Topics

Click on the links above for more information about each option.

Style Options

3 Style Options

The appearance of PATGuard 3 can be customised using the Style feature, which can be accessed from the

top right corner of the Ribbon. As well as the <u>Default Style</u> there are a number of <u>Optional Styles</u> to choose from. These can be selected using the **Style** option in the programme.



Default Style

The default style for PATGuard 3 is "Windows 7".



Default "Windows 7" style

Optional Styles

There are four optional styles to choose from; "Office 2007 (Blue Style)", "Office 2007 (Black Style)", "Office 2007 (Silver Style)" and "Office 2007 (Aqua Style)".

.	Guard 3 - Elite							88
-F	Data Tran		ns Help				Style	- (
New Database Databa		Add Add Client Site	Add Add Location Asset	Find Find Next	Asset View Filter	ast Download Only Auto Schedule	Time Manager	
-22 0	Isers\ArfanH\Des Client 1 Recycled	ktop\test 1.mdb	Lescription 2015	on	Asset ID	Last Full Test D	ate	Ne
📝 Site F	ersal Risk Assessn Reports ress book	sent						
-			-					
Instru	uments	ş						

Optional styles "Office 2007 (Aqua)", "Office 2007 (Silver)", "Office 2007 (Blue)" and "Office 2007 (Black)"

The Navigation Pane

3 The Navigation Pane

The Navigation Pane is displayed on the left hand side of the screen. The relative size of the Navigation Pane and <u>Main Window</u> can be adjusted by clicking and dragging the dividing bar with the mouse.

The Navigation Pane is split into two areas. The bottom area of the Navigation Pane provides access to the main <u>PATGuard 3 functions</u>. The functions displayed in the Navigation Pane can be <u>customised</u> to meet your requirements.

PATGuard 3	Ρ	А	Т	G	u	а	r	d	3
------------	---	---	---	---	---	---	---	---	---

PAT PAT Testing
Universal Risk Assessment
Site Reports
Address book
Reports
Instruments

PATGuard 3 Functions

Depending on the function selected, the top of the Navigation Pane will display one of the following:

- Tree View
- Instruments View

Tree View

The Tree View allows you to navigate the PATGuard 3 database.



The top of the Tree View shows the top level of the database. Underneath this are displayed the configured <u>Clients</u>, <u>Sites</u> and <u>Locations</u>. Parts of the Tree View can be expanded and collapsed using the + and - icons the left of a Client or Site.

The Recycle Bin is also shown in the Tree View.

Instruments View

The Instruments View displays a list of configured instrument types in the Navigation Pane.

Instruments
⊡. All Instruments
Seaward Apollo 600
Seaward PrimeTest 350
Seaward Supernova Elite
Instruments View

Refer to the <u>Instruments</u> section for more information.

Customising the Navigation Pane

3 Customising the Navigation Pane

The <u>Navigation Pane</u> can be customised by <u>hiding</u>, <u>minimising</u>, or <u>rearranging</u> the various <u>PATGuard 3</u> <u>function</u> buttons to better meet your requirements.

Hiding functions

Depending on how you wish to use PATGuard 3 and the functions that you will make use of, you may wish to hide certain <u>functions</u> from the <u>Navigation Pane</u>. For example, if you do not wish to produce <u>Site Reports</u> you may choose to hide this function.

To do this, select the >> button at the bottom of the Navigation Pane to display the Navigation Pane menu.

PAT PAT Testing	
Universal Risk Assessment	
Site Reports	
Address book	
Reports	Show More Buttons
Instruments	Show Fewer Buttons Navigation Pane Options
» •	

Navigation Pane menu

Select **Navigation Pane Options...** from the Navigation Pane menu. This will open the Navigation Pane Options window.

Navigation Pane Options Display buttons in this order	
 PAT Testing Universal Risk Assessment Site Reports Address book Reports Instruments 	Move Up Move Down Reset
ОК	Cancel

Navigation Pane Options window

Toggling the checkbox next to each function in the Navigation Pane Options window will change whether that function is visible or hidden in the Navigation Pane. In the example below, only the <u>PAT Testing</u> and <u>Instruments</u> functions are visible.

PAT Testing	
Instruments	
	» •
Navigation Pana only two functions visible	

Navigation Pane - only two functions visible

Selecting **Reset** in the Navigation Pane Options window will set all functions to visible in the Navigation Pane.

Minimising functions

Rather than <u>hiding functions</u>, you may wish to simply minimise the functions you use least often. Minimising functions also provides more space for the database <u>Tree View</u>.

To do this, select the >> button at the bottom of the Navigation Pane to display the Navigation Pane menu.

PAT PAT Testing	
Universal Risk Assessment	
Site Reports	
Address book	
Reports	Show More Buttons
Instruments	Show Fewer Buttons Navigation Pane Options
>> •	

Navigation Pane - Function menu

Select **Show Fewer Buttons** from the Navigation Pane menu to minimise a function. Functions will be minimised in the order that they appear in the Navigation Pane - in the example above, the Instruments function will be minimised first. To minimise specific functions, <u>rearrange the functions</u> in the Navigation Pane so that the functions you wish to minimise are at the bottom.

In the extreme example below, all of the functions have been minimised.



PATGuard 3 will automatically minimise and maximise functions when running on a small screen or in a small window.

Rearranging functions

You may wish to change the order that functions appear in the Navigation Pane, either to put the functions in a specific order or to enable you to minimise particular functions.

To do this, select the >> button at the bottom of the Navigation Pane to display the Navigation Pane menu.

PAT PAT Testing	
Universal Risk Assessment	
Site Reports	
Address book	
Reports	Show More Buttons
Instruments	Show Fewer Buttons Navigation Pane Options
» •	

Navigation Pane menu

Select **Navigation Pane Options...** from the Navigation Pane menu. This will open the Navigation Pane Options window.

Navigation Pane Options Display buttons in this order	
 PAT Testing Universal Risk Assessment Site Reports Address book Reports Instruments 	Move Up Move Down Reset
ОК	Cancel

Navigation Pane Options window

Selecting a function and using the **Move Up** and **Move Down** buttons in the Navigation Pane Options window will change the order the functions appear in the Navigation Pane.

Selecting **Reset** in the Navigation Pane Options window will set all functions to the default order in the Navigation Pane.

Recycle Bin



When <u>Assets</u>, <u>Hazards</u> or <u>Site Reports</u> are deleted they are moved to the Recycle Bin.

Assets, Hazards or Site Reports located in the Recycle Bin can be viewed by selecting **Recycled** in the Tree View. Deleted items corresponding to the current function will be displayed: Assets will be visible when using the <u>PAT Testing</u> function, Hazards when using the <u>Universal Risk Assessment</u> function and Site Reports when using the <u>Site Reports</u> function.



The deleted Assets, Hazards and Site Reports will be displayed in the Main Window.

Restoring Assets or Hazards

Deleted Assets, Hazards and Site Reports can be restored by right-clicking them in the Main Window and selecting **Restore**.



Restore from Recycle Bin

The asset will be moved from the Recycle Bin back into the main database.

NB: In order for Assets or Hazards to be restored from the Recycle Bin, the Client/Site/Location to which they belong must still exist in the database (or be created manually).

Main Window

3 The Main Window

The Main Window is displayed on the right hand side of the screen. The relative size of the <u>Navigation Pane</u> and Main Window can be adjusted by clicking and dragging the dividing bar with the mouse.

Depending on which of the main <u>PATGuard 3 functions</u> is selected, the Main window will display one of the following views:

- <u>Asset View</u> selected using the **PAT Testing** function
 - o Filtering the Asset View
 - o Sorting the Asset View
- Hazard View selected using the Universal Risk Assessment function
- <u>Site Reports View</u> selected using the Site Reports function
- <u>Personnel View</u> selected using the Address book function
- <u>Reports View</u> selected using the **Reports** function
- Instruments View selected using the Instrument function

Asset View

The Asset View is shown when the <u>PAT Testing</u> function is selected. The Assets View displays the list of <u>Assets</u> for the <u>Client</u>, <u>Site</u> or <u>Location</u> selected in the <u>Tree View</u> on the <u>Navigation Pane</u>.

📥 Description	Asset ID	Last Full Test Date	Next Full Test Date	Last Formal Visual Inspection Date	Next Formal Visual Date
Kettle	Kettle			14/11/2017	14/05/2018
📀 Laptop	Laptop			14/11/2017	14/05/2018
Microwave	Microwave			14/11/2017	14/05/2018
Monitor	Monitor			14/11/2017	14/05/2018
Toaster	Toaster			14/11/2017	14/05/2018
📀 TV	TV			14/11/2017	14/05/2018

Asset View

The column headers can be selected / deselected by right mouse clicking on any of the column headers to display the dropdown. Any items ticked are displayed in the Main Window.

•	Asset Details
✓	Asset ID
\checkmark	Description
	Site
	Location
	Comments Lines
	Make
	Model
	Serial No
	Group
✓	Full Test
1	Last Full Test Date
< < < < < < < < < < < < < < < < < < <	Last Full Test Result
-	Visual result (as part of full test)
-	Earth Continuity Result
-	IR Result
~	PE Leakage
-	Touch Leakage
✓	Sub Leakage
✓	Wiring
\checkmark	User Tests
✓	Next Full Test Date
v	Formal Visual
-	Last Formal Visual Date
	Last Visual Only result
✓	Next Formal Visual Date
v	Risk Assessment
1	Last Risk Assessment Date
•	Last Risk Assessment Result
	Service/Hire
	On Hire
	In Service

Main Window - Asset View Selection Dropdown

Filtering the Asset View

The <u>Assets</u> displayed in the <u>Asset View</u> can be filtered using the <u>Asset View Filter</u> and <u>Last Download Only</u> options in the File Menu.
Sorting the Asset View

The <u>Assets</u> displayed in the <u>Asset View</u> can be sorted based on the information in each column of the Asset View. To do this, click on the column heading you wish to sort on. The blue triangle will move to that column to show which column the Assets are being sorted on. To reverse the direction of the sort, click the column heading again. The blue triangle will change direction to indicate the direction of the sort.

In the example below, the Asset View has been sorted on the Description column in reverse alphabetical order.

V Description	Asset ID	Last Full Test Date	Next Full Test Date	Last Formal Visual Inspection Date	Next Formal Visual Date
📀 TV	TV			14/11/2017	14/05/2018
Toaster	Toaster			14/11/2017	14/05/2018
Monitor	Monitor			14/11/2017	14/05/2018
Microwave	Microwave			14/11/2017	14/05/2018
📀 Laptop	Laptop			14/11/2017	14/05/2018
🤣 Kettle	Kettle			14/11/2017	14/05/2018

Asset View - Sorted

Hazard View

The Hazard View is shown when the <u>Universal Risk Assessments</u> function is selected. The Hazard View displays the list of <u>Hazards</u> for the <u>Client</u>, <u>Site</u> or <u>Location</u> selected in the <u>Tree View</u> on the <u>Navigation Pane</u>.

Description	HazardID
\land Dangerous Plug	123
<u> </u> Trip Hazard	124
🗥 Fall Hazard	125

Hazard View

Site Reports View

The Site Reports View is shown when the <u>Site Reports</u> function is selected. The Site Reports View displays the list of <u>Site Reports</u> for the <u>Client</u>, <u>Site</u> or <u>Location</u> selected in the <u>Tree View</u> on the <u>Navigation Pane</u>.

	Report ID	Report Type	Site	Location	
a Emergency Lighting Site 2					
		Site Reports V	ïew		

Personnel View

The Personnel View is shown when the <u>Address Book</u> function is selected. The Personnel View displays the <u>External Personnel</u> for the <u>Client</u>, <u>Site</u> or <u>Location</u> selected in the <u>Tree View</u> on the <u>Navigation Pane</u>. If the top-level of the database is selected, the Personnel View displays the <u>Internal Personnel</u>.



Personnel View

Reports View

The Reports View is shown when the <u>Reports</u> function is selected. The Reports View displays all the potential reports that can be used. Double clicking on one of the report icons brings up a report filter window (not valid for all reports). This is used to select the data, for example, some reports allow the <u>Client</u>, <u>Site</u> or <u>Location</u> to be filtered.



Instruments View

The Instruments View is shown when the <u>Instruments</u> function is selected. The Instruments View displays the list of Instruments of the type selected in the <u>Instruments View</u> on the <u>Navigation Pane</u>.



Instruments View

Short-cut Keys



A number of common functions in PATGuard 3 can be accessed using the following short-cut keys:

Ctrl + N Ctrl + O Ctrl + F (in PAT Testing Window) F1 F2 (Clients / Sites / Locations) F3 Del

PATGuard 3 functions

PATGuard 3 functions

The main functions of PATGuard 3 are accessible from the Navigation Pane and are as follows:

- PAT Testing
- Universal Risk Assessment
- Site Reports
- Address Book
- <u>Reports</u>
- Instruments

PATGuard 3	Ρ	Α	Т	G	u	а	r	d	3
------------	---	---	---	---	---	---	---	---	---

PAT PAT Testing
Universal Risk Assessment
Site Reports
Address book
Reports
Instruments

PATGuard 3 functions

There are also a number of features common to one or more of the above functions which are accessible from the File Menu. These are as follows:

- Clients
- Sites
- Locations

Click on the links above for more information about each function.

Clients

3 Clients

The details of your customers are stored as Clients in the database. Clients can be added from within the PAT Testing, Universal Risk Assessment and Site Reports functions of PATGuard 3. See also Changing Client Details and Deleting Clients.

Adding Clients

To add a client click on the Add Client option in the File Menu, as shown below, to bring up the Client Details window.



Add Client option

You may find that the Add Client option is greyed out, as shown below.



Add Client option - greyed out

If this is the case, make sure you have the correct function selected, and click on the top level of the database <u>Tree View</u> in the <u>Navigation Pane</u>. You will now be able to add a client to the database.



Top level of database Tree View selected

Client Details Window

Selecting **Add Client** opens the **Client Details** window and allows you to view, add or amend the contact details of your customers, including address, telephone and email details, a reference number and any other notes you would like to add about the Client.

Client Name:	Client 1		
Company:	Acme Company		
Address:	The Acme Building	Reference:	325/A4
	1 Acme Way	Contact:	Mr Joe Bloggs
	London	Telephone:	0123456789
		Fax:	0123456788
Postcode:	SW1 1AA	Email:	joe@acme.com
Notes:			
The Acme Co	mpany is our biggest compan	y.	*
			-

Client Details window

Personnel responsible for Client

The **Personnel** button in the **Client Details** window displays details of <u>Internal Personnel</u> assigned to the client. In this case two Internal Personnel have been assigned to this Client, one in an Administration role and one in a Technical role.

Smith John No Smith Jane Yes	Yes No
mith Jane Yes	No

Personnel assigned to Client

Personnel details are stored in the <u>Address Book</u>. See <u>Adding Internal Personnel</u> for more information on how to add Internal Personnel and assign them to particular Clients.

Changing Client Details

Client details can be changed at any time by double-clicking the Client name in either the database <u>Tree</u> <u>View</u> in the <u>Navigation Pane</u>, or in the <u>Main Window</u>. This will bring up the <u>Client Details</u> window. You can also rename a client by right clicking the client name in the <u>Tree View</u> and selecting **Rename**, or by pressing **F2** whenever the client is selected.

Deleting Clients

Clients can be deleted by selecting them in either the database <u>Tree View</u> in the <u>Navigation Pane</u>, or in the <u>Main Window</u>, and pressing **Delete**. You can also delete a client by right clicking the client name in the <u>Tree View</u> and selecting **Delete**. You will be prompted for confirmation.



Delete Client Confirmation

CAUTION: deleting a Client will also delete any locations, assets and results associated with them.

Sites

3 Sites

The details of addresses where testing is carried out are stored as Sites in the database. Sites can be added from within the <u>PAT Testing</u>, <u>Universal Risk Assessment</u> and <u>Site Reports</u> functions of PATGuard 3. See also <u>Changing Site Details</u> and <u>Deleting Sites</u>.

Depending on your individual requirements, for example whether you are a contractor or perform in-house testing only, sites can be created at the top level of the database or can be associated with a particular <u>Client</u> and appear underneath that Client in the <u>Tree View</u> in the <u>Navigation Pane</u>. An example of both types of Site is shown below - Site 1 is not associated with a Client, whereas Site 2 is associated with Client 1.



Adding Sites

To add a Site click on the **Add Site** option in the <u>File Menu</u>, as shown below, to bring up the <u>Site Details</u> window.



You may find that the Add Site option is greyed out, as shown below.

Add Client	Add Site	Add Location	Add Asset
	Add	i Level	

Add Site option - greyed out

If this is the case, make sure that either the top level of the database or a particular Client is selected within the <u>Tree View</u> in the <u>Navigation Pane</u>. You will now be able to add a Site to the database.

Site Details

The Site Details window allows you to view, add or amend the details of a Site, including the name of the Site, the <u>Client</u> (this will be pre-populated if you created the site under a Client in the <u>Tree View</u>), address and contact details and any other notes you would like to add about the Site.

If the box **Site not at client location** is not ticked, the fields will automatically contain address and contact details of the Client.

Site Name:	Site 2						
Client Name:	Client 1	•	Site not at client address		1 Same	1	
Address:	The Acme Building	Reference:	325/A4		State of the second		
	1 Acme Way	Contact:	Mr Joe Bloggs				
	Lomdon	Telephone:	0123456789	~~~			>>
		Fax:	0123456788			State State State State	
Postcode:	SW1 1AA	Email:	joe@acme.com			Contraction of the local division of the loc	
Notes:					Comment	📝 Default photo	
Be aware tha	t this site is down a very long	single-tracked drive	*		Taken from the m	ain gate	

Site Details window

Attaching photos to Site Details

You can also attach photos of the Site to the Site Details. To do this, click the **Add Attachment** button in the Site Details window. This will open the Open Photo window.

🗸 🗸 🖛 🖛 🗸 Libra	ries 🕨 👻 😽 Sear	rch Libraries 🔰
Organize 💌		8 · 🗆 🛛
🔆 Favorites	Libraries Open a library to see your files and arran	
Libraries Documents Music	Documents	
Pictures Videos	Music Library	
🜏 Homegroup	Pictures Library	
P Computer	Videos	
🗣 Network	Library	
F	le name: JPEG	images (".jpg) 🔹

Open Photo window

Browse to find the photo you want to attach and click **Open** to attach the photo to the Site Details. Multiple photos can be attached to each Site and comments can be added to each photo. To select the default photo for a Site, click the **Default photo** box in the Site Details window.

You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.

PATGuard3	23
Delete picture?	
Yes	No

Delete Picture Confirmation

Personnel responsible for Site

The **Personnel** button in the <u>Site Details</u> window displays details of <u>Internal Personnel</u> responsible for the Site. In this case two Internal Personnel have been assigned to this Site, one in an Administration role and one in a Technical role.

Surname	Name	Admin	Technical
Smith	John	No	Yes
Smith	Jane	Yes	No
			Close

Personnel assigned to Site

Personnel details are stored in the <u>Address Book</u>. See <u>Adding Internal Personnel</u> for more information on how to add Internal Personnel and assign them to particular Site.

Changing Site Details

Site details can be changed at any time by double-clicking the Site name in either the database <u>Tree View</u> in the <u>Navigation Pane</u> or in the <u>Main Window</u>. This will bring up the <u>Site Details</u> window. You can also rename a Site by right clicking the Site name in the <u>Tree View</u> and selecting **Rename**, or by pressing **F2** whenever the site is selected.

Deleting Sites

Sites can be deleted by selecting them in either the database <u>Tree View</u> in the <u>Navigation Pane</u>, or in the <u>Main Window</u>, and pressing **Delete**. You can also delete a site by right clicking the site name in the <u>Tree</u> <u>View</u> and selecting **Delete**. You will be prompted for confirmation.



Delete Site Confirmation

CAUTION: deleting a Site will also delete any locations, assets and results associated with it.

Locations

3 Locations

Locations provide a way of dividing <u>Sites</u> into smaller, more manageable sections. Locations can be added from within the <u>PAT Testing</u>, <u>Universal Risk Assessment</u> and <u>Site Reports</u> functions of PATGuard 3. See also <u>Changing Location Details</u> and <u>Deleting Locations</u>.

The exact meaning of a Location can change depending on your individual requirements. If a <u>Site</u> represents a single building, for example, a Location could be a room within that building. If a Site has multiple buildings, a Location could be a specific building on that Site.

Adding Locations

To add a Location, first select the <u>Site</u> that the Location is to be created at in the <u>Tree View</u> in the <u>Navigation Pane</u>.



To add the Location click on the **Add Location** option in the <u>File Menu</u>, as shown below, to bring up the <u>Location Details</u> window.

		0	
Add Client	Add Site	Add Location	Add Asset
	Add	l Level	
۸.		tion ontic	

Add Location option

You may find that the Add Location option is greyed out, as shown below.



		0	
Add		Add	Add
Client		Location	Asset
	Add	Level	

Add Location option - greyed out

If this is the case, make sure you are within a Site that the Location will be added to from within the Tree View in the Navigation Pane.

Location Details

The Location Details window allows you to view, add or amend the details of a Location, including the name and description of a Location, the associated Client and Site (these may already be pre-populated with the details of the Client and Site you selected in the Tree View), and any other notes you would like to add about the Location.

		22
Locatio	n Details	
Location Name:	Office 1	
Description:	Sales office	
Client Name:	Client 1	
Site Name:	Site 2	
Notes:	guipment stored in the cupboard by the window.	
Musi also (est e	apprierit stored in the capabalo by the window.	Default photo
	-	
		Attachment 1/1
	OK Cancel	Add Attachment Delete Attachment

Location Details window

Attaching photos to Location Details

You can also attach photos of the Location to the Location Details. To do this, click the Add Attachment button in the Location Details window. This will open the Open Photo window.

PATGuard 3

Organize 🔻		S • 🗆 6
🔆 Favorites	Libraries Open a library to see your files and arran	
Call Libraries	Documents Library Music Library	
🔧 Homegroup	Pictures Library	
🐺 Computer	Videos Library	

Open Photo window

Browse to find the photo you want to attach and click **Open** to attach the photo to the Location Details. Multiple photos can be attached to each Location and comments can be added to each photo. To select the default photo for a Location, click the **Default photo** box in the Location Details window.

You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.

PATGuard3	23
Delete picture?	
Yes	No

Delete Picture Confirmation

Changing Location Details

Location details can be changed at any time by double-clicking the Location name in either the database <u>Tree View</u> in the <u>Navigation Pane</u> or in the <u>Main Window</u>. This will bring up the <u>Location Details</u> window. You can also rename a Location by right clicking the Location name in the <u>Tree View</u> and selecting **Rename**, or by pressing **F2** whenever the site is selected.

Deleting Locations

Locations can be deleted by selecting them in either the database <u>Tree View</u> in the <u>Navigation Pane</u>, or in the <u>Main Window</u>, and pressing **Delete**. You can also delete a Location by right clicking the site name in the <u>Tree View</u> and selecting **Delete**. You will be prompted for confirmation.



Delete Location Confirmation

CAUTION: deleting a Location will also delete any assets and results associated with it.

PAT Testing

3 PAT Testing

The PAT Testing function of PATGuard 3, which is accessible from the <u>Navigation Pane</u>, allows you to view, add and amend details of <u>Assets</u>, manually add <u>Test Results</u> and perform <u>PAT Risk Assessments</u>.

PAT PAT Testing
Universal Risk Assessment
Site Reports
Address book
Reports
Instruments

Navigation Pane - PAT Testing

When the PAT Testing function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>Assets</u> associated with whichever <u>Site</u> or <u>Location</u> is selected in the database <u>Tree View</u>, along with details of the last and next test dates for those Assets. Items due for tests are highlighted in red.



Description	Asset ID	Last Full Test Date	Last Full Test Result	Visual result
📀 Computer	00001	14/11/2017	Passed	Pass
IEC Lead	00002	14/11/2017	Passed	Pass
📀 Kettle	00003	13/11/2017	Passed	Pass
Microwave	00004	13/11/2017	Passed	Pass

Main Window - Asset View

The column headings, in the Main Window, can be selected from a dropdown - right mouse click on any of the headers to display the dropdown.

✓	Asset Details
<	Asset ID
\checkmark	Description
	Site
	Location
	Comments Lines
	Make
	Model
	Serial No
	Group
<	Full Test
\checkmark	Last Full Test Date
$ \diamond \diamond \diamond \diamond \diamond \diamond \diamond \diamond \diamond \diamond$	Last Full Test Result
\checkmark	Visual result (as part of full test)
\checkmark	Earth Continuity Result
\checkmark	IR Result
\checkmark	PE Leakage
\checkmark	Touch Leakage
\checkmark	Sub Leakage
\checkmark	Wiring
\checkmark	User Tests
✓	Next Full Test Date
•	Formal Visual
\checkmark	Last Formal Visual Date
	Last Visual Only result
✓	Next Formal Visual Date
 Image: A start of the start of	Risk Assessment
\checkmark	Last Risk Assessment Date
•	Last Risk Assessment Result
	Service/Hire
	On Hire
	In Service

Main Window - Asset View Selection Dropdown

PAT Testing functions

The main PAT Testing functions of PATGuard 3 are as follows:

- <u>Assets</u>
- <u>Test Results</u>

PAT Risk Assessment

Related activities

There are also a number of other features associated with the <u>PAT Testing</u> functions of PATGuard 3. These are as follows:

- <u>Clients</u>
- <u>Sites</u>
- Locations

Click on the links above for more information about each function.

Assets

3 Assets

Assets refer to physical items to be tested. PATGuard 3 allows you to add Assets to a particular <u>Site</u> or <u>Location</u>, to manually <u>add test results</u>, and also to add <u>PAT Risk Assessments</u> to those Assets.

Viewing and Filtering Assets

To view the Asset Details for a particular Asset, double-click the Asset in the Main Window.

To review <u>Test Results</u> for an Asset, open the <u>Asset Details</u> window and double click on the **Test Result** you want to view. See also <u>Changing Asset Details</u> and <u>Deleting Assets</u>.

You can also filter Assets by certain criteria. For more information on filtering Assets, refer to the <u>Find</u>, <u>Asset View Filter</u> and <u>Last Download Only</u> pages.

Manually Adding Assets

To add an Asset, first select the <u>Site</u> or <u>Location</u> that the Asset is to be created at in the <u>Tree View</u> in the <u>Navigation Pane</u>.



Option 1; To add the Asset click on the **Add Asset** option in the <u>File Menu</u>, as shown below, to bring up the <u>Asset Details</u> window. <u>Test Results</u> can be added using the **Add Results** button in the <u>Asset Details</u> window.



Option 2; The <u>Add Manual Test Result</u> feature allows a manual test result to be added to an <u>Asset</u> that is already in the database. This feature automatically opens the <u>Asset Details</u> and <u>Test Results</u> Windows ready for results to be added.

Cloning Assets

A quick way to duplicate an Asset, which is useful if you have multiple similar items to add, is to right click on the Asset in the <u>Main Window</u> and select **Clone**. This will create a copy of the Asset, but without any <u>Test Results</u>, see <u>Manually Adding Assets</u> for details on how to add <u>Test Results</u>.

Coffee Machine	Clone	
	Delete	Del

Clone Assets

Asset Details

The Asset Details window allows you to view, add or amend details of the Asset, including Asset ID, Description and <u>Asset Group</u>. The <u>Site</u> and <u>Location</u> will already be populated.

							23
Asset Det	ails						
Asset Details Adva	nced						
Asset Id: Description: Asset Group: Site Name: Location Name:	123 Kettle Office Portable Equipment (Cla Site 2 Office 1	• ss I) • •	<<			nent 📝 Def ry colourful kettle	hment 1/1 ault photo >> Delete Attachment
Full Test Test Period: Group	p Default 🔹 24 Months 👻		Test Results	Perfo	orm Risk Assessment		
Next Due:	Untested		Date	Test No.	Туре	Overall Result	Person
Program:			04/07/2013		Risk	High	
Formal Visual Test Test Period: Grou Next Due: Program: Program:	IDefault IDefau						
Notes	<	OK Cancel		A	dd Results	elete	

Asset Details window

The Asset Details window can also be viewed by double-clicking the Asset in the Main Window.

Advanced Asset Details

The Advanced Asset Detail tab allows you to add additional information about an Asset, including the Make,

Model and Serial Number.

Asset De	etails	
Asset Details Ad	vanced	
Make:	Morphy Richards	•
Model:	Purple Plus	•
Serial No.:	n/a	
Test Code 1:		
Test Code 2:		

Asset Detail Window - Advanced tab

If your test instrument supports Test Codes, these will be displayed. *Please refer to your test instrument manual for more information on Test Codes.*

Retest Period

The Retest Period for Full Test and Formal Visual Test can also be set in the Asset Details window.

Full Test	
Test Period:	Group Default 🔻 24 Months 💌
Next Due:	Untested
Program:	
Formal Visual Test Period: Next Due: Program:	Test Group Default ▼ 12 Months ▼ Untested

Asset Detail Window - Retest period

The options for Retest Period include:

- No Re-test no Retest Period is defined
- User Defined Retest Period can be manually entered in the <u>Asset Details</u> window and will automatically be calculated from the last test date
- Group Default the Retest Period will be set based on the Asset Group the Asset belongs to
- As Risk Assessment the Retest Period will be set based on the results of a PAT Risk Assessment

Asset Notes

You can add notes about an Asset to the Asset Details. To do this, click the **Notes...** button in the <u>Asset</u> <u>Details</u> window. This will open the Asset Notes window.

Asset Notes	23
This asset is located in the cupboard in the kitchen.	*
	Ŧ
OK Cano	el

Asset Detail Window - Notes window

The text included in the **Asset Notes** is the text that appears in **Comments Lines** of the <u>Main Window</u> - for help in selection / de-selection of the **Comments Lines** see <u>Asset View</u>.

Manually adding Test Results

To manually add Test Results to an Asset, click on Add Results... in the Asset Details window.

See the Test Results page for more information on manually adding Test Results to an Asset.

Adding a PAT Risk Assessment

To add a PAT Risk Assessment to the Asset, click on **Perform Risk Assessment...** in the <u>Asset Details</u> window.

See the PAT Risk Assessment page for more information on adding a PAT Risk Assessment to an Asset.

Deleting Test Results or PAT Risk Assessments

To delete <u>Test Results</u> or a <u>PAT Risk Assessment</u> associated with a Asset, select the row containing the test results or PAT Risk Assessment in the <u>Asset Details</u> window and hit the **Delete** button. You will be prompted for confirmation.



Delete Test Results / PAT Risk Assessment

Attaching photos to Asset Details

You can attach photos of the Asset to the Asset Details. To do this, click the **Add Attachment** button in the <u>Asset Details</u> window. This will open the Open Photo window.

🕽 🔾 🗢 🥽 🕨 Libra	ries 🕨 👻 🐓	Search Lib	naries		
Organize 🔻			8: •		
🚖 Favorites	Libraries Open a library to see your files and arran				
 Libraries Documents Music 	Documents Library				
Pictures	Music Library				
🖏 Homegroup	Pictures Library				
🖳 Computer	Videos				
🙀 Network	Library				
Fi	le name:	JPEG image	s (".jpg)		•
		Open		Cancel	

Open Photo window

Browse to find the photo you want to attach and click **Open** to attach the photo to the Asset Details. Multiple photos can be attached to each Asset and comments can be added to each photo. To select the default photo for a Asset, click the **Default photo** box in the <u>Asset Details</u> window.

You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.

PATGuard 3

PATGuard3	23
Delete picture?	
Yes	No

Delete Picture Confirmation

Changing Asset Details

Asset details can be changed by double-clicking the Asset in the <u>Main Window</u> this will bring up the <u>Asset</u> <u>Details</u> window.

Moving Assets

Assets can be moved using two methods;

Option 1; In the <u>Asset Details</u> tab of the <u>Asset Details</u> window, the **Site Name** and **Location Name** can be altered by selection from the corresponding dropdown. Once the relevant **Site** and **Location** has been selected the changes are only confirmed after selecting **OK** to save / close the <u>Asset Details</u> Window.

sset Det	ails	
sset Details Adva	nced	
Asset Id:	SPT1	
Description:	Fire Extingusher	•
Asset Group:	<none></none>	•
Site Name:	Birmingham	•
Location Name:	Kitchen	•

Asset Detail Window - Asset Details tab

Option 2; You can highlight a single Asset or multiple Assets and Drag and Drop them from the the Main Window to a **Site** / **Location** in the Navigation Pane.



Note; the icon of the mouse will change to show if you can move to the Site / Location selected.

Deleting Assets

Assets can be deleted by selecting them in the <u>Main Window</u>, and pressing **Delete** or by right mouse clicking on the asset and selecting **Delete** from the menu.

Coffee Machine	Clone	
	Delete	Del

Delete Assets Selection

You will be prompted for confirmation.

PATGuard3	X
?	Are you sure you want to delete the selected items?
	OK Cancel

Delete Asset Confirmation

Deleted Assets can be restored from the Recycle Bin.

<u>CAUTION:</u> deleting an Asset will also delete any Test Results or PAT Risk Assessments associated with it.

Test Results

3 Test Results

Test Results are linked to individual <u>Assets</u> and store details of visual inspections, electrical tests and <u>PAT</u> <u>Risk Assessments</u> associated with that Asset.

View Test Results

To view Test Results for an Asset, you firstly need to open the <u>Asset Details</u> window by double-clicking the Asset in the <u>Main Window</u>, The information for this Asset are displayed in this window. See also <u>Changing Asset Details</u> and <u>Deleting Assets</u>.

							23
Asset Details	S						
Asset Details Advanced							
Site Name: Site	tle Îce Portable Equipment (Class	r) •	<<			nent 📝 Def ry colourful kettle	hment 1/1 ault photo
Full Test Test Period: Group Defau Next Due: Program:	ult v) 24 Months v Untested		Test Results	Test No.	orm Risk Assessment	Overall Result	Person
Formal Visual Test	ult 12 Months		04/07/2013		Risk	High	
Notes	« »	OK Cancel		A	dd Results)	lete	

Asset Details window

The Test Results window displayed in the <u>Asset Details</u> can show details of visual inspections, electrical tests and <u>PAT Risk Assessments</u> associated with that Asset. Double-clicking in Test Result section will open the <u>Test Details</u> window or the <u>PAT Risk Assessment</u> window, depending on the type of Test Result.

Manually adding Test Results

Clicking **Add Results...** in the <u>Asset Details</u> windows will open a blank <u>Test Details</u> window for you to manually enter Test Results. Alternatively, the <u>Add Manual Test Result</u> button can be selected from the <u>Functions Menu</u>.

Test Details window

The **Test Details** window allows you to view, add or amend details of individual Results for an Asset. For new electrical tests, you can select the <u>Test Instrument</u> used to associate with the Results.

est Details						X
Test Instrument: Serial No.: Test Results:	Seaward Apollo 600 08E-0799	 Test Code 1: Test Code 2: 		-	$\widehat{}$	
Test type	Result	Unit	Status			
Visual			Passed			
Earth	0.01	Ohms	Passed			>>
Insulation	9.9	MOhms	Passed 👻			
				Comment	📝 Default photo	
Comments:				A very colourfu	l kettle	
Kettle is brand ne	w and passed all tests w	ith flying colours.	*			
			~	Att	achment 1/1	
Add Result	Delete Result)K Cancel	Add Attachme	Delete Attachment	

Test Details window

To add a Result, click **Add Result** in the Test Details window to add a new Result. Select the Test type from the available options and enter the Result and Status (whether the Test was a Pass or Fail, for example). You can also select the units, although this will normally be automatically selected for you. Continue adding results using the **Add Result...** button until you have entered the complete sequence of tests. If you need to delete a row, select the row and click the **Delete Result**.

Attaching photos to a Test Result

You can also attach photos of the Asset to the Test Result. To do this, click the **Add Attachment** button in the Test Details window. This will open the Open Photo window.

Open			22
🕽 🔾 🗢 🥽 🕨 Libri	ries 🕨 👻 🐓	Search Libraries	3
Organize 💌		ş • 🗆	0
🚖 Favorites	Libraries Open a library to see your files and arran		
Documents	Documents		
Pictures Videos	Music Library		
🜏 Homegroup	Pictures Library		
1 Computer	Videos		
www.wetwork	Library		
F	ile name: 💌	JPEG images (".jpg)	•
		Open Cancel	

Open Photo window

Browse to find the photo you want to attach and click **Open** to attach the photo to the Test Result. Multiple photos can be attached to each Test Result and **Comments** can be added to each photo. To select the default photo for a Test Result, click the **Default photo** box in the Test Details window.

You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.



Delete Picture Confirmation

Delete Result

To delete a Test Result, select the row containing the test results or <u>PAT Risk Assessments</u> in the <u>Test</u> <u>Details</u> window and hit the **Delete Result...** button. You will be prompted for confirmation.



Delete Test Results

PAT Risk Assessment

I PAT Risk Assessment

PAT Risk Assessments can be performed directed from the <u>Asset Details</u> window by clicking the **Perform Risk Assessment...** button. They can also be performed by clicking on an <u>Asset</u> in the <u>Main Window</u> and selecting **PAT Risk Assessment** from the <u>Function Menu</u>, as shown below, to bring up the <u>PAT Risk</u> <u>Assessment</u> window.



PAT Risk Assessment option

PAT Risk Assessment window

The PAT Risk Assessment window allows you to view or complete a <u>PAT Risk Assessment</u> for an <u>Asset</u>. Entering details about the <u>Asset</u> and the environment at the <u>Site</u> or <u>Location</u> will automatically calculate a

recommended Retest Period.

	22
Environment	Offices & Shops
Equipment Type	Portable -
Construction Class	Class I 👻
User	Trained to detect and report defects
Type of Installation	Enclosed or protected mains cabling
Frequency of Use	Frequent
Previous Test Results	Well within acceptable limits 💌
Risk Assessment	High
Recommended Formal Visual Frequency	12
Recommended Full Test Frequency	24
	Comment Default photo A very colourful kettle
	>> Attachment 1/1 Add Attachment Delete Attachment

PAT Risk Assessment window

Attaching photos to a PAT Risk Assessment

You can also attach photos of the Asset to the PAT Risk Assessment. To do this, click the **Add Attachment** button in the PAT Risk Assessment window. This will open the Open Photo window.

PATGuard 3

Organize 🔻		8 · 🗆 🖲
🔆 Favorites	Libraries Open a library to see your files and arran	
Documents Music	Documents Library	
Pictures Videos	Music Library	
🔧 Homegroup	Pictures Library	
👯 Computer	Videos	
🗣 Network	Library	

Open Photo window

Browse to find the photo you want to attach and click **Open** to attach the photo to the PAT Risk Assessment. Multiple photos can be attached to each PAT Risk Assessment and comments can be added to each photo. To select the default photo for a PAT Risk Assessment, click the **Default photo** box in the PAT Risk Assessment window.

You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.

PATGuard3	23
Delete picture?	
Yes	No

Delete Picture Confirmation

Universal Risk Assessment

Universal Risk Assessment

The Universal Risk Assessment function of PATGuard 3, which is accessible from the <u>Navigation Pane</u>, allows you to view, add and amend details of <u>Hazards</u> and perform <u>Universal Risk Assessments</u>.

PATGuard 3	PA	TG	Gua	rd	3
------------	----	----	-----	----	---

PAT	PAT Testing
	Universal Risk Assessment
	Site Reports
0	Address book
-	Reports
	Instruments

Navigation Pane - Universal Risk Assessment

When the Universal Risk Assessment function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>Hazards</u> associated with whichever <u>Site</u> or <u>Location</u> is selected in the database <u>Tree View</u>.

Description	HazardID
🗥 Trip Hazard	00001
🕂 Fall Hazard	00002

Main Window - Hazard View

Universal Risk Assessment functions

The main Universal Risk Assessment functions of PATGuard 3 are as follows:

- <u>Hazards</u>
- Perform Universal Risk Assessment

Related activities

There are also a number of other features associated with the Universal Risk Assessment functions of PATGuard 3. These are as follows:

- <u>Clients</u>
- Sites
- Locations

Click on the links above for more information about each function.

Hazards

3 Hazards

PATGuard 3 allows you to add Hazards to a particular <u>Site</u> or <u>Location</u>, and also to add <u>Universal Risk</u> <u>Assessments</u> to those Hazards.

Manually adding Hazards

To add a Hazard, first select the <u>Universal Risk Assessment</u> function from the <u>Navigation Pane</u> and then select the <u>Site</u> or <u>Location</u> that the Hazard is to be created at in the <u>Tree View</u> of the <u>Navigation Pane</u>. See

also Changing Hazard Details and Deleting Hazards.



Select a Site or Location

To add the Hazard click on the **Add Hazard** option in the <u>File Menu</u>, as shown below, to bring up the <u>Hazard Details</u> window.



Add Hazard option

Hazard Details

The Hazard Details window allows you to view, add or amend details of the Hazard, including **Hazard ID** and **Description**, and to perform a <u>Universal Risk Assessment</u> for the Hazard. The <u>Site</u> and <u>Location</u> will already be populated.

				X
Hazard D	etails			
Hazard ID:	00001			
Description:	Trip Hazard			•
Site Name:	Site 2			•
Location Name:	Location 1			•
Risk Assessments	Perf	orm Risk Assessment	t	
Date	Test No.	Actions Complete	Actions Due	Person
04/07/2013		No		Admin
Delete		<< >>	ОК	Cancel

Hazard Details window, including a Universal Risk Assessment

The << and >> buttons can be used to view the previous / next Hazard at that <u>Site</u> or <u>Location</u>.

Adding a Universal Risk Assessment

To add a Universal Risk Assessment to the Hazard, click on Perform Risk Assessment...

See the <u>Perform Universal Risk Assessment</u> page for more information on adding a Universal Risk Assessment to a Hazard.

Deleting a Universal Risk Assessment

To delete a Universal Risk Assessment associated with a Hazard, select the row containing the Universal Risk Assessment and hit the **Delete** button. The row selected will be highlighted as red and you will be prompted for confirmation.



Delete Universal Risk Assessment

Changing Hazard Details

Hazard details can be changed by making sure the <u>Universal Risk Assessment</u> function is selected in the <u>Navigation Pane</u> and double-clicking the Hazard in the <u>Main Window</u>. This will bring up the <u>Hazard Details</u> window.

Moving Hazards

Hazard can be moved by double-clicking the Hazard in the <u>Main Window</u>. This will bring up the <u>Hazard</u> <u>Details</u> window.

The **Site Name** and **Location Name** can be altered by selection from the corresponding dropdown. Once the relevant Site and Location has been selected the changes are only confirmed after selecting OK to save / close the <u>Hazard Details</u> Window.

Deleting Hazards

Hazards can be deleted by selecting them in the <u>Main Window</u>, and pressing **Delete**. Alternatively, you can right mouse click on the Hazards, in the <u>Main Window</u>, and select **Delete**.

Description	HazardID		
🗥 Large Plant Pot	HZ0001		
A frayed wire at ceiling height	HZ0002	Delete	Del

Delete Hazard Confirmation

You will be prompted for confirmation.



Delete Hazard Confirmation

Deleted Hazards can be restored from the Recycle Bin.

CAUTION: deleting a Hazard will also delete any Universal Risk Assessments associated with it.

Perform Universal Risk Assessment

3 Perform Universal Risk Assessment

Universal Risk Assessments can be performed directly from the <u>Hazard Details</u> window using the **Perform Risk Assessment...** button.

				×
Hazard De	etails			
Hazard ID:	00001			
Description:	Trip Hazard			•
<u>Site</u> Name:	Site 2			•
Location Name:	Location 1			•
Risk Assessments	Perfi	orm Risk Assessment		
Date	Test No.	Actions Complete	Actions Due	Person
D <u>e</u> lete		<	ОК	Cancel

Hazard Details - Universal Risk Assessment selection

Universal Risk Assessments can also be performed by clicking on a <u>Hazard</u> in the <u>Main Window</u> and selecting **Universal Risk Assessment** from the Risk Assessment section of the <u>Function Menu</u>, as shown below, to bring up the <u>Universal Risk Assessment</u> window.



Universal Risk Assessment option

Note; you will need to be in the correct **Site** / **Location**, in the <u>Navigation Pane</u>, to be able to select **Universal Risk Assessment** from the Risk Assessment section of the <u>Function Menu</u>.

Universal Risk Assessment window

When the Universal Risk Assessment is first performed the window it opens shows the <u>Username</u>, <u>Site</u>, <u>Location</u>, Hazard ID and Hazard Description already populated.

Username	Admin
Site	Site 2
Location	Location1
Hazard Id	00001
Hazard Description	Trip Hazard
Who might be harmed and how?	<u>۲</u> ۸
Current Controls in place	v A
Impact of Risk event	Minor
Probability of Occurrence	Unlikely 🔽
Add Action	Comment Default photo Comment 0/0 Add Attachment Delete Attachment

Universal Risk Assessment window - new entry

Additional information such as who might be harmed / controls can be added. In addition, a risk assessment can be performed to determine the impact of the hazard, which will advise the risk level.

(herepter)	readit -	x
Who might be harmed and how?	People working in this location	*
Current Controls in place	None	
Impact of Risk event Probability of Occurrence Priority of Risk Level Advice	Moderate Possible 6 Moderate Risk - Significant Action should be planned in accordance with the overall risk management program. Monitor with caution.	н
Add Action		•
<<	Comment Default photo Attachment 0/0 Add Attachment Delete Attachment	
	Ok	

Universal Risk Assessment window - risk calculation

Add Action

From within the Universal Risk Assessment, corrective actions can be added by clicking the **Add Action** button. This will add an Action to the bottom of the Universal Risk Assessment, as shown below.

Impact of Risk event	Moderate 🔽
Probability of Occurrence	Possible
Priority of Risk Level	6
Advice	Moderate Risk - Significant Action should be planned in accordance with the overall risk management program. Monitor with caution.
1 Actions Required to R	Reduce Risk Rectify uneven surface
	▼
By When 10/07/2013	
,	Default photo

Universal Risk Assessment - Add Action

Note; multiple actions can be added to a single Universal Risk Assessment.

Attaching photos to Universal Risk Assessment

You can also attach photos of the Hazard to the Universal Risk Assessment. To do this, click the **Add Attachment** button in the Universal Risk Assessment window. This will open the Open Photo window.

PATGuard 3

Organize 🔻		St • 🗆 🌘
🔆 Favorites	Libraries Open a library to see your files and arran	
Documents Music	Documents	
Pictures	Music Library	
🔧 Homegroup	Pictures Library	
Normputer	Videos	
🙀 Network	Library	

Open Photo window

Browse to find the photo you want to attach and click **Open** to attach the photo to the Universal Risk Assessment. Multiple photos can be attached to each Universal Risk Assessment and comments can be added to each photo. To select the default photo for a Universal Risk Assessment, click the **Default photo** box in the Universal Risk Assessment window.

You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.

PATGuard3	23
Delete picture?	
Yes	No

Delete Picture Confirmation

Printing a Universal Risk Assessment

A print button only appears in the Universal Risk Assessment window once it has been reopened after the initial creation of the assessment.

	X
Hazard Description	Trip Hazard
Who might be harmed and how?	People working in this location
Current Controls in place	None
Impact of Risk event Probability of Occurrence Priority of Risk Level Advice	Moderate V Possible V 6 Moderate Risk - Significant Action should be planned in accordance with the overall risk management program. Monitor with caution.
Add Action	Default photo Attachment 0/0 Add Attachment Delete Attachment
Print	Ok Cancel

Universal Risk Assessment window - with Print button

Selecting Print in this window will take you to a standard print options selection window.

Site Reports

3 Site Reports

The Site Reports function of PATGuard 3, which is accessible from the <u>Navigation Pane</u>, allows you to view, add and amend details of Site Reports relating to particular <u>Sites</u> and <u>Locations</u>.

PAT	PAT Testing
	Universal Risk Assessment
1	Site Reports
0	Address book
	Reports
	Instruments

Navigation Pane - Site Reports
When the Site Reports function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the Site Reports associated with whichever <u>Site</u> or <u>Location</u> is selected in the database <u>Tree View</u>.

Report ID	Report Type	Site	Location
² 10023	Emergency Lighting	Site 1	Restaurant
៉ 10024	Fire Alarm	Site 1	Restaurant

Main Window - Site Report View

Site Reports functions

The main Site Reports functions of PATGuard 3 include the ability to add, view and amend the following reports:

- Emergency Lighting
- <u>Fire Alarm</u>

Related activities

There are also a number of other activities associated with the Site Reports functions of PATGuard 3. These are as follows:

- <u>Clients</u>
- <u>Sites</u>
- Locations

Click on the links above for more information about each function.

Emergency Lighting

I Emergency Lighting

PATGuard 3 allows you to create an Emergency Lighting Site Report for a given <u>Site</u> or <u>Location</u>. See also <u>Editing Emergency Lighting Site Reports</u> and <u>Deleting Emergency Lighting Site Reports</u>.

To add an Emergency Lighting Site Report, first select the <u>Site</u> or <u>Location</u> that you wish to create an Emergency Lighting Site Report for in the <u>Tree View</u> in the <u>Navigation Pane</u>.



Select a Site or Location

Next click on the **Emergency Lighting** option in the <u>Functions Menu</u>, as shown below, to bring up the <u>Emergency Lighting Site Report</u> window.





Emergency Lighting Site Report

The Emergency Lighting Site Report window allows you to view or complete an Emergency Lighting assessment for a given <u>Site</u> or <u>Location</u>. Some fields will already be populated with <u>Client</u> or <u>Site</u> details.

ort ID: 00001 Name: Site 2		
ation Name: <pre></pre>		
A. DETAILS OF THE CI	IENT	
Client:	Client 1	A
Address:	The Acme Building, 1 Acme Way, London, SW1 1AA	
B. DETAILS OF THE EN	IERGENCY LIGHTING INSTALLATION	
Installation Address:	To c	ose of Certificate ertify continued pliance of an existing
C. DETAILS OF THE EI		
0	Decidation	+
Address:	Registration Number: Telephone Number:	
accordance with the 'Res nstallation complies at th ighting Part 1: Code of	e emergency lighting system installation at the above premises has been inspected and ults Schedule of Items inspected and tested' on page 2, and to the best of my/our knowl e time of my/our inspection and testing with the recommendations given in BS 5266-1: ; practice for the emergency lighting of premises, BS EN 1838: 1999 / BS 5266-7: 1999 / BS EN 50172: 2004 / BS 5266-8: 2004 Emergency escape lighting systems, except as	edge and belief, the 2005 Emergency Lighting applications -

Emergency Lighting Site Report window

Editing an Emergency Lighting Site Report

To edit an Emergency Lighting Site Report, double-click the Emergency Lighting Site Report in the <u>Main</u> <u>Window</u> to bring up the <u>Emergency Lighting Site Report</u> window.

Deleting an Emergency Lighting Site Report

To delete an Emergency Lighting Site Report, select the Emergency Lighting Site Report in the <u>Main</u> <u>Window</u> and hit the **Delete** button. You will be prompted for confirmation.



Delete Emergency Lighting Site Report

Printing an Emergency Lighting Site Report

A print button only appears in the Site Report window once it has been reopened after the initial creation of the report.

Site	Reports Details		x
R	eport ID:	0001	
Si	te Name:	Site 1 v	
Ŀ	ocation Name:	Location 1	
	1	and socket anangement is used, it is protected against unauthonsed menerence.	
	9.3.3	P13 - System has a suitable test facility for the application	
	9.3.5	P14 - Central power system output voltage range is compatible with the supply voltage range of the luminaires, taking into account supply cable voltage drop	
	10.1	P15 - Luminaires tested and found to operate for their full rated duration	
	11.6	P16 - Operation and maintenance	
	12	P17 - test records in the log book complete and satisfactory	
	12.3	P18 - Instructions together with a suitable log book showing a satisfactory commissioning test available for use by the building occupier	
	13	P19 - Luminaires clean and undamaged with lamps in good condition	
	13	Building occupier and their staff trained on suitable maintenance, testing and operating procedures or a current maintenance contract is in place.	
	13.2	P21 - Evidence of servicing of Central Battery System (in line with manufacturer's procedures); in- house or current maintenance contract is in place	
	13.3	Evidence of servicing of Standby Generator System (in line with manufacturer's procedures); in-house or current maintenance contract is in place	
	13.4	P23 - After test, the charging indicators operate correctly	
	K. Test Inst	truments Used	
	Inetri	ument 1 (Light Meter) Model: Serial Number: Instrument 2 (If Any) Model; Serial Number:	
	msuc		E
	-		-
	Print	Upload OK Canc	el

Emergency Lighting Site Report window - with **Print** button

Selecting **Print** in this window will take you to a standard print options selection window.

Fire Alarm



PATGuard 3 allows you to create a Fire Alarm Site Report for a given <u>Site</u> or <u>Location</u>. See also <u>Editing Fire</u> <u>Alarm Site Reports</u> and <u>Deleting Fire Alarm Site Reports</u>.

To add a Fire Alarm Site Report, first select the <u>Site</u> or <u>Location</u> that you wish to create a Fire Alarm Site Report for in the <u>Tree View</u> in the <u>Navigation Pane</u>.



Select a Site or Location

Next click on the **Fire Alarm** option in the <u>Functions Menu</u>, as shown below, to bring up the <u>Fire Alarm Site</u> <u>Report</u> window.



Site Reports - Fire Alarm

Fire Alarm Site Report

The Fire Alarm Site Report window allows you to view or complete a Fire Alarm assessment for a given <u>Site</u> or <u>Location</u>. Some fields will already be populated with <u>Client</u> or <u>Site</u> details.

ort ID:	00002		
Name:	Site 2		
ition Name:	<none></none>		
A. DETAILS	OF THE CLI	ENT	
Client:		Client 1	*
Address:		The Acme Building, 1 Acme Way, London, SW1 1AA	
B. DETAILS	OF THE FIR	E DETECTION AND ALARM SYSTEM	T
Installation A	ddress:	The Acme Building, 1 Acme Way, London, SW1 1AA	*
Details of the	e system:		*
C. EXTENT	OF THE INS	TALLATION AND LIMITATIONS OF THE INSPECTION AND SERVICING	*
Extent of the f	ire detection	and alarm system covered by this report:	
			*
Agreed Limita	ations, if any,	of the inspection and servicing:	*
		NSPECTION AND SERVICING	*
/we being the alarm system, best of my/ou	e competent (, particulars (r knowledge riodic inspec	person(s) responsible (as indicated by my/our signatures below) for the inspection and serv of which are set out above, CERTIFY that the said work or which I/we have been responsible and belief with the recommendation of Clause 45 of BS 5839-1:2002 quarterly inspection of tion and test / inspect and test over a 12 months period (delete as applicable), except for the	e complies to the of vented

Fire Alarm Site Report window

Editing a Fire Alarm Site Report

To edit a Fire Alarm Site Report, double-click the Fire Alarm Site Report in the <u>Main Window</u> to bring up the <u>Fire Alarm Site Report</u> window.

Deleting a Fire Alarm Site Report

To delete a Fire Alarm Site Report, select the Fire Alarm Site Report in the <u>Main Window</u> and hit the **Delete** button. You will be prompted for confirmation.

PATGuard3	22
Are you sure you	u want to delete the selected items?
	OK Cancel

Delete Fire Alarm Site Report

Printing a Fire Alarm Site Report

A print button only appears in the Site Report window once it has been reopened after the initial creation of the report.

00002	
Name: Site 1	*
ation Name: Location 1	*
Changes in use, layout or construction of the premises have not reduced system effectiveness Cabling has fire resistance complying with Clause 26.2 Circuits monitored in compliance with Clause 12.2 Requirements of BS 7671 are met (Clause 29) RELATED REFERENCE DOCUMENTS	Log book available. (If not available, a suitable log book
Design Specification Ref No:	Date Issued:
Design Drawings Ref No(s):	Date Issued:
'As Fitted' Drawing Nos:	Date Issued:
Electrical Installation Certificate No:	Date Issued:
Fire Alarm Design Certificate No:	Date Issued:
Fire Alarm Install Certificate No:	Date Issued:
Fire Alarm Commission Certificate No:	Date Issued:
Fire Alarm Verification Certificate No:	Date Issued:
Operating and Maintenance Inst:	Date Issued:
Previous Inspection and Servicing	Date Issued:
Log Book:	Date Issued:
Other:	Date Issued:

Fire Alarm Site Report window - with **Print** button

Selecting Print in this window will take you to a standard print options selection window.

in the

Address Book

3 Address Book

The Address Book function, which is accessible from the <u>Navigation Pane</u>, allows you to view, add and amend details of Personnel. These Personnel can either be <u>Internal Personnel</u> or <u>External Personnel</u>.

PAT	PAT Testing
	Universal Risk Assessment
1	Site Reports
0	Address book
	Reports
	Instruments

Navigation Pane - Address Book

When the Address Book is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>External</u> <u>Personnel</u> associated with whichever <u>Client</u>, <u>Site</u> or <u>Location</u> is selected in the database <u>Tree View</u>. If the top level of the Database is selected in the <u>Tree View</u>, the <u>Main Window</u> will show the <u>Internal Personnel</u>.



Main Window - Address Book View

Internal Personnel

Internal personnel are staff that you employ or that otherwise work on your behalf. They can be either Technical or Administration staff and can be assigned responsibility for individual clients and sites.

See <u>Adding Internal Personnel</u> for more information.

External Personnel

External personnel are staff associated with a particular <u>Client</u>, <u>Site</u> or <u>Location</u>. They act as a contact for that Client, Site or Location and can receive relevant Reports by email.

See Adding External Personnel for more information.

Adding Internal Personnel

3 Adding Internal Personnel

Internal personnel are staff that you employ or that otherwise work on your behalf. They can be either Technical or Administration staff and can be assigned responsibility for individual Clients and Sites. See also <u>Changing Internal Personnel Details</u> and <u>Deleting Internal Personnel</u>.

Note; when the Address Book is selected in the <u>Navigation Pane</u>, if the top level of the Database is selected in the <u>Tree View</u>, the <u>Main Window</u> will show the <u>Internal Personnel</u>.

To add new Internal Personnel, select the Address Book from the Navigation Pane.

PATGuard 3	Ρ	Α	Т	G	u	а	r	d	3
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Universal Risk Assessment
Site Reports
Address book
Reports
Instruments

Navigation Pane - Address Book

Select the top level of the database in the <u>Tree View</u>.

PAT Testing	
⊡📇 G:\PATGuard3.m	ndb
📄 🜆 Client 1	
📶 Site 2	
🖧 Recycled	
📶 Site 1	

Top level of database Tree View selected

The <u>Main Window</u> will show the names of any Internal Personnel that have already been added. Click on **Add Personel...** in the Main Window to add new Internal Personnel.



Main Window - Address Book View

Internal Personnel Details

The Internal Personnel Details window allows you to view, add or amend the details of the Internal Personnel, including address, telephone and email details and whether they are Administration or Technical staff.

PAT	Gua	rd	3
-----	-----	----	---

orename:	Jane	Surname:	Smith
Company:	PAT Ltd	Department:	Administration
\ddress:	PAT Ltd HQ	Telephone:	0122345678
	An Industrial Estate	Fax:	0122345679
	North of Watford Gap	Email:	jane@pat.co.uk
		Postcode:	NE1 2BE
vailable Clie	nts/Sites:	Responsibilitie	38:
		>> Client 1 Site 1 Site 2	

Internal Personnel Details

Responsibility for Clients and Sites

The Internal Personnel Details window is also used to assign responsibility for <u>Clients</u> or <u>Sites</u> to a particular staff member. A list of available Clients and Sites appears in the **Available Clients/Sites** box. To assign responsibility for a particular Client or Site, use the >> button to move the Client or Site to the **Responsibilities** box. To remove responsibility for a particular Client or Site, use the <> button to Site, use the << button to more the Client or Site, use the **Available Clients/Sites** box.

In the example below, John Smith is responsible in a Technical role for Client 1 and Site 1, but not Site 2.

PAT	Gua	rd	3
-----	-----	----	---

Perso	nnel		
orename:	John	Surname:	Smith
Company:	PAT Ltd	Department:	Test Services
\ddress:	Pat Ltd HQ	Telephone:	0122345678
	An Industrial Estate	Fax:	0122345679
	North of Watford Gap	Email:	john@pat.co.uk
		Postcode:	NE1 2BE
Available Clie	nts/Sites:	Responsibilitie	es:
Site 2		>> Client 1 Site 1	
		<<	

Personnel Details Window - Site/Client Responsibility

Changing Internal Personnel Details

Internal Personnel details can be changed by double-clicking the name of the Internal Personnel in the <u>Main</u> <u>Window</u>. This will bring up the <u>Internal Personnel Details</u> window.

Deleting Internal Personnel

Internal Personnel can be deleted by selecting the name of the Internal Personnel in the <u>Main Window</u> and pressing **Delete** or by right mouse clicking on the Personnel icon to open the following selection;

9 6		
Jane Blogg		
	Add Personnel	
	Details	
	Delete	

Personnel Selection

Once **Delete** is selected you will be prompted for confirmation.



Delete Personnel Confirmation

Adding External Personnel

3 Adding External Personnel

External personnel are staff associated with a particular <u>Client</u>, <u>Site</u> or <u>Location</u>. They act as a contact for that Client, Site or Location and can receive relevant Reports by email. See also <u>Changing External</u> <u>Personnel Details</u> and <u>Deleting External Personnel</u>.

Note; when the Address Book is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>External</u> <u>Personnel</u> associated with whichever <u>Client</u>, <u>Site</u> or <u>Location</u> is selected in the database <u>Tree View</u>.

To add new External Personnel, select the Address Book from the Navigation Pane.

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Navigation Pane - Address Book

Select the <u>Client</u>, <u>Site</u> or <u>Location</u> that you wish to associate the External Personnel with in the database <u>Tree View</u>.



The <u>Main Window</u> will show the names of any External Personnel that have already been added for that <u>Client</u>, <u>Site</u> or <u>Location</u>. Click on **Add Personel...** in the <u>Main Window</u> to add new External Personnel.



Main Window - Address Book View

External Personnel Details

The External Personnel Details window allows you to view, add or amend the details of the External Personnel, including telephone and email details.

Perso	onnel		22
Forename:		Surname:	Bloggs
Email:	joe@acme.com	Telephone:	0123456789
			OK Cancel

External Personnel Details

Changing External Personnel Details

External Personnel details can be changed by double-clicking the name of the External Personnel in the <u>Main Window</u>. This will bring up the <u>External Personnel Details</u> window.

Deleting External Personnel

External Personnel can be deleted by selecting the name of the External Personnel in the <u>Main Window</u> and pressing **Delete** or by right mouse clicking on the Personnel icon to open the following selection;

9 0		
Jane Bloggs		
	Add Personnel	
	Details	
	Delete	

Personnel Selection

Once **Delete** is selected you will be prompted for confirmation.



Delete Personnel Confirmation

Reports

3 Reports

The Reports function of PATGuard 3, which is selected from the <u>Navigation Pane</u>, allows you to generate Reports from the information in the PATGuard 3 database, such as Test Reports and Certificates, and also <u>Invoices</u> and <u>Repair Management</u>. For a full list see <u>List of Reports</u>.

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Navigation Pane - Reports

When the Reports function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>Reports</u> available for selection.



Reports Functions

There are a number of tasks that can be completed from within the Reports function.

- List of Reports
- Generating a Report
- Printing or saving to file

- o Saving a Report to file
- o Print a Report
- o Emailing a Report
- <u>Invoicing</u>
- Repair Management
- Editing Reports
 - o Copying a Report
 - o Editing a Report
 - How do I Edit a Report
 - How to Shrink the Report Text to fit the Column Width
 - o Deleting a Report
 - o <u>Restoring a Default Report</u>

Click on the links above for more information about each function.

List of Reports

3 List of Reports

PATGuard 3 comes with a number of pre-configured default Reports for different applications:

- Asset Barcoded Labels
- Barcode List
- Concise Asset List
- Detailed Asset List
- In Service On Hire
- Concise Task Checklist
- Concise Latest Test Results
- Concise Test History
- Detailed Latest Test Results
- Detailed Test History
- Electrical Test Summary
- Test Certificates
- Test Sequence Summary
- Test Instrument Details
- Certificate of Testing
- Invoice
- List Charges
- Client Details
- Personnel Details
- Short Code Details
- Site Details
- Summary of Tests
- Test Sequence Details
- Universal Risk Assessment

When the Reports function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>Reports</u> available for selection.



Reports can be <u>copied</u>, <u>edited</u>, <u>deleted</u> and <u>restored</u> as required. See also <u>Generating a Report</u> and <u>Printing</u> <u>or saving</u> to file.

Generating a Report

3 Generating a Report

When the Reports function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>Reports</u> available for selection.



Main Window - Available Reports

Reports are generated by double-clicking the Report you wish to generate, or by right-clicking on the report and selecting **Print...** or **Print preview...**

Edit
Сору
Delete
Restore
Print
Print Preview

Main Window - Report Generation

The basic process of Generating a Report is the same for each report, although the options you will be asked to select will vary depending on the report type. On first generating a report you will open a filter window - if applicable you can filter using a <u>Client</u>, <u>Site</u>, <u>Location</u> and date range etc.

Reports Example - Certificate of Testing

In this example we will generate a Certificate of Testing. Double-click **Certificate of Testing** in the <u>Reports</u> <u>View</u> in the <u>Main Window</u>. This will open the Certificate of Testing window. Select the <u>Client</u>, <u>Site</u> and <u>Location</u> you wish to generate Test Certificates for, or use the **<all>** option (note; a site is required in this option). You can also enter some text to add to the Certificate of Testing. Click **OK** to generate the Certificate of Testing.

	X
Certificat	te of Testing
Client Name:	Client 1 🔹
Site Name:	Site 2 🔹
Location Name:	Location 1
Certificate Text:	Testing Completed
-	
	OK Cancel

Reports - Certificate of Testing

Once the Test Certificates have been generated the Preview window will open.



Reports - Certificate of Testing preview

From the Preview window you can <u>Print</u>, <u>Save</u> or <u>Email</u> your report. See also <u>copying</u>, <u>editing</u>, <u>deleting</u> and <u>restoring</u> Reports.

Printing or saving to file



After <u>Generating a Report</u>, the <u>Report</u> can be <u>Saved</u>, <u>Printed</u> or <u>Emailed</u> as required from the Reports Preview window.



Reports - Certificate of Testing preview

Saving Reports to a file

To save a <u>Report</u> to a file, click the **Save** icon open the Save As window.

in the menu bar of the the Reports Preview window to

3 Save As		23
Save in: 밀	Folder 🗸	• 🕝 🤌 📂 🛄 •
Name	*	Date modified Ty
	No items match your sea	rch.
File name:	rrr preview.pdf	► Save
Save as type:	PDF document (*,pdf)	✓ Cancel
_	file in the registered application orted files by email	
Save opti	ons permanently	

Saving a Report

Save in: allows you to change the where the file is saved and change the name of the file in the **File name:** field.

There are a number of file types that Reports can be saved as, although .pdf and .jpg are the most common. Use the dropdown in **Save as type:** field to select the file type required.

Some file types have additional features that can be set by selecting **Options...** The Reports Preview window has its own Help file to guide you through the options. To open the Reports Preview Help file, press **F1** while the Reports Preview is open (note; this opens a help file for the List and Label software, which is separate from PATGuard 3).

Printing Reports

To print a Report to your default Windows printer, click the Print Current Page

(left hand icon) or

Print all Pages (middle) icon in the menu bar of the Reports Preview window. Depending on the size of the data being printed, you may see the following message:

Sending data to printer
0%
Print to Microsoft XPS Document Writer Page 1 of 1
× Cancel



Emailing Reports

To email a <u>Report</u>, click the **Email** (Send To..) icon window to open the Email window.

in the menu bar of the the Reports Preview

PDF document (*.pdf):*.pdf	• ОК
Options	Cancel
Display mail before sending	

Emailing a Report

After selecting the desired **Options...** (if applicable), click **OK** to open your default email program and attach the Report to an email.

There are a number of options of file types that Reports can be emailed as, although .pdf and .jpg are the most common. Some file types have additional options that can be set by selecting **Options...** The Reports Preview window has its own Help file to guide you through the options. To open the Reports Preview Help file, press **F1** while the Reports Preview is open.

Invoicing

Invoicing

PATGuard 3 allows you to generate <u>Invoices</u> so that the <u>Client</u> can be billed for work undertaken.

To generate an Invoice, make sure the **Reports** function is selected in the <u>Navigation Pane</u> and in the <u>Main</u> <u>Window</u> select **Invoice** by either double clicking on the icon or by right-clicking on Invoice selecting **Print**... or **Print preview**...





Invoice Window

The Invoice window allows you to select the <u>Client</u>, <u>Site</u> and <u>Location</u> you wish to generate an Invoice for, along with the price per test for various test types, invoice number, order reference, discounting and any other notes that you wish to add. You can also select the types of Charges to be included, including <u>Tests</u>, <u>Risk Assessments</u> and <u>Repairs</u>. Once you have entered the details, click **OK** to generate the Invoice.

				_	23
Invoice					
Client Name:	Client 1				•
Site Name:	Site 2				•
Location Name:	Location 1				•
Charges type:					
Formal Vis	ual	Price pe	er test:	2	
V Full Test	All	Price pe	er test:	5	
VAT Risk A	ssessment	Price pe	er test:	3	
📝 Repairs		Curren	cy:	£	
		Purchas	se Tax:	20	%
Test Dates Fr	om: 11/01/2013	To:	18/07/20	13 [-
Invoice No.:	4	Order Ref.:	12345		
Additional Item:	Travel		Cost:	25	
Fixed Price Contract:			verall scount:	10	%
Notes:	Invoice for Client 1			1	
					_
		OK		Cance	

Invoice window

Once the Invoice has been generated, the Reports Preview window will open.

3 Preview	> > 100% ·	- 🔒 🔒 111 🗃 🗃	*	
	Invoice Para		EAWARD	
	Indiana 4 Thursday 16 July 2013 Statistics 16 July 2013 Statistics Theory (North Yann Ham, 11) Statistics Theory (North Yann) Frenc PJ 7 Statistics Theory PJ 8 July 2013 Statistics Disabotist 10 JULy Statistics Disabotist 10 JULy Statistics Disabotist 10 JULy Statistics Disabotist 10 JULy Statistics	cons te rections	BER BER (192 (1996)) 0041 0041 0041 0041 0041 0041 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1 0041 0041 1	
	Instanty Class 1			

Invoice Preview

From the Preview window you can Print, Save or Email your invoice.

Repair Management

3 Repair Management

PATGuard 3 allows you to manage repairs and keep track of the costs involved.

Setting up Repairs

Repair costs can be entered in the <u>Test Details window</u>.

st Details Test Instrument: Serial No.:	Seaward Apollo 600 08E-0799	 Test Code 1: Test Code 2: 			4		
Test Results: Test type Visual Earth Insulation	Result 0.01 9.9	Unit Ohms MOhms	Status Passed Passed Passed	<<	Z		>>
Comments: Kettle is brand ne	w and passed all tests w	ith flying colours.			Comment A very colourfu	I Default photo I kettle	
Add Result	Delete Result		TK Cancel		At Add Attachme	tachment 1/1	

Test Details window

To add a repair, follow the procedure to <u>Add Test Results Manually</u>. Under **Test type** enter details of the repairs undertaken. Enter the cost of the repair under **Result**, and make sure that **Status** is set to **Repair**. You can also add any comments associated with the repair.

Test Results:				
Test type	Result	Unit	Status	
Fuse Replaced	2.50		Repair	
Comments:				
Fuse Replaced				*
				-

Add Repair

Printing Repair details

To print details of repairs, generate an <u>Invoice</u> in the normal way and ensure that **Repairs** is ticked.

						23
Invoice						
Client Name:	Client 1					•
Site Name:	Site 2					•
Location Name:	Location 1					•
Charges type:						
V Formal Visi	ual	•	Price p	er test:	2	
V Full Test	All	•	Price p	er test:	5	
V PAT Risk A	ssessment		Price p	er test:	3	
Repairs			Curren	cy:	£	
			Purcha	se Tax:	20	%
Test Dates Fr	om: 11/01/2013		To:	18/07/20	013	•
Invoice No.:	4	Order	Ref.:	12345		
Additional Item:	Travel			Cost:	25	
Fixed Price Contract:			_	verall scount:	10	%
Notes:	Invoice for Client 1	1]	
		ſ	ОК		Cance	-
			UN		Curico	

Generate Invoice

The generated <u>Invoice</u> will display details of the repair and the cost involved so that the <u>Client</u> can be billed.

Preview			
4 1 of 1	- > > 100% - 5	A A 111 B B B B B B B B B B B B B B B B	
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	But car Disaur ar 1000s Para Sellen car VAT as 36 de Faar dus	र का स द्वा द म्ह्य द म्ह्य	
	India for Clark 1		

Generated Invoice

Editing Reports

3 Editing Reports

PATGuard 3 has the facility to <u>edit</u> reports, however, we recommend report editing is only attempted by advanced / confident IT users.

To enable editing, PATGuard 3 uses a programme called The Reports Designer (List & Label), and this allows you to edit a <u>Report</u> to better meet your requirements.

It is recommended that a <u>copy</u> of the original Report is made and this copy is used as a template for your edited version of the report. When the Reports function is selected in the <u>Navigation Pane</u>, the <u>Main Window</u> will show the <u>Reports</u> available for selection.



Reports can be <u>edited</u>, <u>copied</u>, <u>deleted</u> or <u>restored</u> (note only Default Reports can be restored) by rightmouse clicking on the report and selecting the corresponding function;

	Edit
	Copy
	Delete
	Restore
Main	Window - Report Selection

Main Minden Report Colocitori

The Reports Designer has its own Help file to guide you through the editing process. To open the Reports Designer Help file, press **F1** while the Reports Designer is open or select the **?** symbol from the menu bar.

Copying a Report

Copying a Report

To copy a Report, right mouse click on the Report in the <u>Main Window</u> and select **Copy...** this will open the Copy Report window. Enter a name for the Report and select **OK**.

		23
Copy R	eport	
Report Name:	My New Report Name	
		OK Cancel

Copy Report window

You will see a window confirming that the Report has been copied successfully.



Copy Report confirmation

The new Report will now appear in the Main Window.

Editing a Report

Editing a Report

To edit a Report, right click on the Report in the <u>Reports View</u> in the <u>Main Window</u> and select **Edit...** This will open the Reports Designer window.

 Compare to the state of th

Note; It is recommended that a <u>copy</u> of the original Report is made and this copy is used as a template for your edited version of the report.

Reports Designer window

The Reports Designer has its own Help file to guide you through the editing process. To open the Reports Designer Help file, press **F1** while the Reports Designer is open or select the **?** symbol from the menu bar.

For examples of how to use the **Report Designer** see <u>How do I Edit my Reports</u> and <u>How to Shrink the</u> <u>Report Text to fit the Column Width</u>.

How do I Edit my Reports

I How do I Edit a Report

To edit a report right mouse click on the report with the details as near to your own requirements as possible.

From the drop menu select copy... and create a copy of the report with a New Name and select OK.

Note 1; the following is an example of how the **Concise Task Checklist** Report could be customised – to change the **Next Test** entry to **Last Test**.

Note 2; the **Edit...** option will not be available if the PATGuard 3 user does not have Edit permissions. An **Admin** PATGuard 3 user can check other users' permissions from **Setup** and in the **User Accounts**.

Right mouse click on the copied report and from the drop down menu select **Edit...** this opens the report designer:

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Reports Designer window

Put your mouse pointer onto the area or line of the report you want to edit and double left click. This will open the table contents for the line or area selected in the report.

To change the appearance and layout of the fields use the options on the right hand side of the Table Contents window. Once you are finished select **OK** to return to the main report Designer window.

Changing the Header Line

Header Line Data Line Footer Line Group Header Group	Footer		
Line Definition 1 (1)	80 2i		0
Line	Link URL		
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"AssetID"	Background	0	[transparent]
"AssetDescription"	Font		[Arial]
"NextTest"	Format	none	
"NextVisualTest"	Rotation	0	[0*]
***	Text Format	True	[Normal Text]
	E Layout		
	Alignment	0	[left]
	Appearance Condition	True	[Show]
	Blank Optimization	True	[Yes]
	Fit	1	[wrap]
	Frame		
	Justified	False	[No]
	Vert. Alignment	0	[top]
	Width	42.0	[42.0 mm]
	Action		
Layout			

Table Contents window – Header Line

The order of the fields can be changed using the up and down arrows – clicking on any of the current fields, in the **Header Line** tab, for example "**NextTest**", shows the current setup. Note, if the three dashes symbol (---) is clicked, this will allow a new field to be added, if required.

Double left clicking on "**NextTest**", opens the **Edit Table** window showing the text entry "**NextTest**" field – "**Last Test**" can be typed in here.

Edit Table	Transfer of an array and the	×
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Edit Table window – For Header Line

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Table Contents window – Header Line changed to Last Test

Changing the Data Line

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Table Contents window – Data Line

Again clicking on any of the current fields, in the **Data Line** tab, for example, **ASSETS.NextTest**, shows the current setup.

Double left clicking on **ASSETS.NextTest**, opens the **Edit Table** window showing the text entry **ASSETS.NextTest** field – **ASSETS.NextTest** can be typed in here or selected from the available fields.

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Edit Table window – For Data Line

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Table Contents window – Data Line changed to ASSETS.LastTest

Changing the Group Header

A similar process needs to be followed to alter the text of the **Group Header** tab, the final result will be as follows:

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Table Contents window – Group Header changed to Last Test

Repeating the Changes in the Report Structure

You may need to add / alter a field to each layer of the report that you want the changes to appear. For example, if you want to add an additional asset variable to the below you would need to repeat the above steps for each of the tables in the **Report Structure** that relate to assets.

Field widths can be adjusted by dragging the edge of the field with the mouse, alternatively you can drag and drop a field from the right-hand column into the report to the position you require. In either case this may need to be performed in multiple layers of the report template.

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Reports Designer window – showing Last Test updated

How to Shrink the Report Text to fit the Column Width

I How to Shrink the Report Text to fit the Column Width

In some reports if the text may be too long and can go over more than one line. If you wish to prevent this you can shrink the text to fit using these instructions.

In the reports tab right mouse click on the report and select Edit...

As an example, once in the designer in the **Report Structure** window select **Table: ASSETS [[Locations2Assets]]** as per the below.

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Reports Designer window

Double click on the area under the column you wish to shrink in the report preview to open the below window. In the right hand list select **Fit**.

Line Definition 1	1		24		[۲	
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			Appearance Condition	True	[Show]		
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Error: Table width is too small by 5.4 mm!			Fit	1	[wrap]		
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Table Contents window - Fit selected
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Use the dropdown to select '2 [shrink]' and press OK.

Table Contents window - [shrink] selected

Back in the designer in the **Report Structure** window select the line highlighted in the below and repeat the process.



Reports Designer - first change

PATGuard 3

Back in the designer in the **Report Structure** window select the line highlighted in the below and repeat the process.



Reports Designer - second change

Finally, in the designer in the **Report Structure** window select the line highlighted in the below and repeat the process.

PATGuard 3

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Reports Designer - third change

Select save.

Deleting a Report

3 Deleting a Report

To delete a Report, right mouse click on the Report in the Main Window and select **Delete**.

Note; once an edited / bespoke report has been deleted it cannot be restored - you can only <u>Restore a</u> <u>Default Report</u>.

After selecting **Delete** you will be prompted for confirmation.



Delete Report window

You will see a window confirming that the Report has been deleted successfully.



Delete Report confirmation

Restoring a Default Report

3 Restoring a Default Report

To restore a Default Report, right mouse click on the Report in the <u>Main Window</u> and select **Restore**, this will open the Restore Report window. Select the name of the Report you wish to Restore and select **OK**.

	23
Restore Report	
Asset Barcoded Labels Barcode List	-
Certificate of Testing Client Details Concise Asset List Concise Latest Test Results Concise Task Checklist Concise Test History Detailed Asset List Detailed Latest Test Results Detailed Latest Test Results Detailed Test History Electrical Test Summary In Service On Hire Invoice List Charges Personnel Details Short Code Details Site Details	E
	ancel

Restore Report

You will be prompted for confirmation.



Restore Report

You will see a window confirming that the Report has been restored successfully.



Restore Report

The restored Report will now appear in the Reports View in the Main Window.

Instruments

Instruments

The Instruments function of PATGuard 3, which is accessible from the <u>Navigation Pane</u>, allows you to manage your Test Instruments. See <u>Tester Compatibility</u> for a list of test instruments that are compatible with PATGuard 3.

PAT PAT Testing
Universal Risk Assessment
Site Reports
Address book
Reports
Instruments

Navigation Pane - Instruments

When the Instruments function is selected in the Navigation Pane, the Tree View will be replaced with a list

of configured Instrument types.



Navigation Pane - Configured Instrument Types

Selecting **All Instruments** will display all of the configured Instruments in the <u>Main Window</u>. Selecting a particular Instrument type will display all configured Instruments of that type in the <u>Main Window</u> (in the example, a Supernova Elite, PrimeTest 350 and Apollo 600).



Main Window - All Instruments

Instrument functions

There are a number of tasks that can be completed from within the Instruments function.

- Adding Test Instruments
- Entering Calibration Data
- Adding Test Sequences

There are also a number of other features related to the Instruments function.

Downloading From Your Tester

- o Downloading Apollo Series
- o Downloading Supernova / Europa
- o Downloading PrimeTest 350 / 300
- o <u>Downloading General Instructions</u>
- Finding the Correct COM port
- o Preview (PAT Data Only)
- o <u>Duplicate Assets</u>
- Uploading To Your Tester
 - o Uploading Apollo Series
 - o Uploading Supernova / Europa
 - o Uploading PrimeTest 350 / 300
 - o <u>Uploading General Instructions</u>

Click on the links above for more information about each function.

Adding Test Instruments

4 Adding Test Instruments

PATGuard 3 allows you to store details of your Test Instruments, including <u>Calibration Data</u>, as Instruments in the database.

To add a new Test Instrument, select <u>Instruments</u> from the <u>Navigation Pane</u>. See also <u>Changing Instrument</u> <u>Details</u> and <u>Deleting Instruments</u>.

PATGuar	d 3	
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Navigation Pane - Instruments

The <u>Main Window</u> will show the currently configured Test Instruments. On a new install / new database, no instruments will be selected and only **Add Test Instrument...** will be displayed.



Double click on **Add Test Instrument...** icon or right mouse click on the icon and select **Add Test Instrument...**, in the Main Window to open the Test Instrument window to add a new Test Instrument.



Main Window - All Instruments (3 instruments already added)

Test Instrument window

The Test Instrument window allows you to view, add or amend the details of a Test Instrument, including Instrument type, Calibration details and Communications settings.

PATGuard 3

Test Instrument	22
Instrument Calibration Communications	
Instrument Type:	-
Serial Number:	
ОК	Cancel

Test Instrument window

Instrument

The Instrument tab, in the Test Instrument window, allows you to select the **Instrument Type** and enter the **Serial Number**. Select the instrument from the dropdown,

Note 1; Manually entered instruments will not work.

Note 2; If your instrument is not selectable in the dropdown, then check <u>Tester Compatibility</u> or you may be able to use the <u>Import CSV</u> function (if your instrument produces data that can be added to a spreadsheet).

PATGuard 3

est Instrume	ent		×	
Instrument	Calibratio	on Communications		
Instrument	Type:		-	
	iber:	Seaward Apollo 600 Seaward Apollo 500 Seaward Apollo 400 Seaward Prime Test 350 Seaward Prime Test 300 Seaward Supemova Elite Seaward Supemova XE Plus Seaward Supemova XE Seaward Supemova XE Seaward Supemova XE Seaward Europa Plus Seaward Europa PAC Plus Seaward Europa XE Plus Seaward Europa XE Seaward Europa XE Seaward Europa SE Seaward PAT2000 Seaward PAT2000 Seaward PAT2000 Seaward PAT1000X Seaward PAT1000 Seaward SEN60204 Ethos 9600 Ethos 9500 Ethos 9300		
		Clare SafeCheck 8 Clare SafeTest Luminaire Clare SafeTest Manufacturing		
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Test Instrument Type - Dropdown Selection

If selecting an instrument that uses USB to download, such as the Apollo Series, the Communications tab is no longer available.

PATGuard 3

Test Instrument		23
Instrument Calibrat	tion	
Instrument Type:	Seaward Apollo 600	-
Serial Number:	12A-3456	
	ОК	Cancel

Test Instrument 1 - Instrument tab (USB Download / Apollo Series)

If selecting an instrument that uses a serial RS232 lead, the Communications tab is still available.

Test Instrument		23
Instrument Calibrat	ion Communications	
Instrument Type:	Seaward Supernova Elite	-
Serial Number:	23B-4567	
	OK Car	ncel

Test Instrument 2 - Instrument tab (RS232 Download)

Calibration

The Calibration tab shows details of the Instrument calibration.

See <u>Entering Calibration Data</u> for more information on adding, editing or deleting Test Certificates for an Instrument.

lest Instrument				23
Instrument Calit	oration Communica	ations		
	Last Calibrat	ion:	20/10/2016	-
Test Certificates	Next Calibra s:	tion:	20/10/2017	-
Test Date	Certificate No	Test (Centre	
•	III		4	
Add	I Edit		Delete	
		(OK Cancel	

Test Instrument - Calibration tab

Communications

For instruments that transfer data to and from the PC using serial communications, for example RS232 (not the USB download and Apollo Series), the Communications tab allows you to set the **Bits per second**, **Data bits**, **Parity** and **Stop bits** settings.

Please refer to <u>Downloading From Your Tester</u> or confirm via your test instrument manual for more information on Communications settings, note the following is just an example:

PATGuard 3

Test Instrument	8
Instrument Calibration	Communications
Bits per second:	57600 -
Data bits:	8 •
Parity:	None
Stop bits:	2 •
	OK Cancel

Test Instrument - Communication tab

Changing Instrument Details

Instrument details can be changed at any time by double-clicking the Instrument name in the <u>Main Window</u> or by right-clicking on the Instrument in the <u>Main Window</u> and selecting **Details...** This will bring up the <u>Test</u> <u>Instrument window</u>.

Deleting Instruments

Instruments can be deleted by selecting them in the <u>Main Window</u>, and pressing **Delete**. You can also delete an Instrument by right clicking the Instrument in the <u>Main Window</u> and selecting **Delete**. You will be prompted for confirmation.

PATGuard3	
? Are yo the da	sure you want to permanently delete the selected item(s) from base?
	OK Cancel

Delete Instrument Confirmation

<u>CAUTION</u>: deleting an Instrument will also delete any calibration certificates associated with the Instrument.

Entering Calibration Data



PATGuard 3 allows you to store details of your <u>Test Instrument</u> Calibration Test Certificates in the database.

To add a Test Certificate, open the <u>Calibration tab</u> of the <u>Test Instrument window</u>. See also <u>Changing Test</u> <u>Certificates</u> and <u>Deleting Test Certificates</u>.

est Instrument			
Instrument Cali	bration Communic	ations	
	Last Calibrat	ion: 20/10/2016	
Test Certificate:	Next Calibra s:	tion: 20/10/2017	
Test Date	Certificate No	Test Centre	
•	III		- Þ.
Add	d Edit.	Delete	
		OK Car	ncel

Test Instrument window - Calibration tab

Select Add... to open the Test Certificate window.

Test Certificate window

The Test Certificate window allows you to enter details of a Calibration Test Certificate, including the Test House contact details, the Certificate Number and the Test Date.

Test Certificat	e				23
Test House:	Seaward Electronic Ltd	Certifica	ite No:	1234567	89
Address:	Bracken Hill	Test Da	Test Date:		16 👻
	South West Industrial Estate				
	Peterlee	Tel:	+44 (0)) 191 5863	511
	County Durham	Fax:	+44 (0)) 191 5860	227
Postcode:	SR8 2SW	Email:	service	e@seawar	d.co.uk
		OK		Car	ncel

Test Certificate window

Click **OK** to add the Test Certificate.

Changing Test Certificates

Test Certificate details can be changed at any time by selecting them in the Calibration tab of the <u>Test</u> <u>Instrument window</u> and selecting **Edit...** This will bring up the <u>Test Certificate window</u>.

Deleting Test Certificates

Calibration Test Certificates can be deleted by selecting them in the Calibration tab of the <u>Test Instrument</u> <u>window</u> and selecting **Delete**. You will be prompted for confirmation.



Delete Test Certificate Confirmation

Adding Test Sequences

3 Adding Test Sequences

PATGuard 3 allows you to create custom Test Sequences for compatible <u>Test Instruments</u>, such as the **Seaward SuperNova Elite** or **Europa Plus**.

Please refer to your test instrument manual for more information on whether you can add custom Test Sequences.

To add a custom Test Sequence, select a compatible Instrument type from the list of configured Instruments in the <u>Navigation Pane</u>. See also <u>Uploading Test Sequences</u>, <u>Changing Test Sequences</u> and <u>Deleting Test</u> <u>Sequences</u>.



Navigation Pane - Select compatible Instrument

When a compatible Instrument type is selected, the option **Add Test Sequence** will appear in the <u>Main</u> <u>Window</u>.



Main Window - Add Test Sequence

Double-click Add Test Sequence in the Main Window to open the Test Sequence Details window.

Test Sequence Details window

The Test Sequence Details window allows you to enter details of the Test Sequence including the Test Sequence name, the specifics of the tests to be carried out, and whether the test should Include Visual Inspection and Include Polarity Test.

Note; uploading a Test Sequences can over right sequences already stored on your instrument.

For each of the available tests, in this case **Socket**, **Earth Bond**, **Insulation**, **Substitute Leakage**, **Flash**, **Leakage**, **Touch Leakage** and **RCD Test**, select from the list of options for **Output**, **Limit**, **Test Duration** and **No. of Tests**. For any tests you do not wish to include in the Test Sequence, set **Limit** to **Skip**.

				23
Test Sequ	ience D	etails _		
Name:	Test Sequence	1		
	Output			
Socket:	230V 🔻	Limit	Test Duration	No. of Tests
Earth Bond:	+/-200mA 🔻	0.01 ohm 💌	2s 🔻	1 •
Insulation:	500V d.c. 💌	1.0MOhm 💌	2s 🗸	1 •
Substitute Leakage:		0.25mA 🔹	28 🗸	1 •
Flash:		Skip 🔻	28 -	1 -
Leakage:		Skip 👻	28 -	1 -
Touch Leakage:		Skip 🔹	2s 👻	1 -
RCD Test:		Skip 🔻]	1 -
📝 Include Visual Insp	ection			
Include Polarity Te			OK	Cancel

Test Sequence Details window

Click OK to add the Test Sequence. The Test Sequence will now appear in the Main Window.



Main Window - New Test Sequence

Uploading Test Sequences

To upload a Test Sequence to your tester, ensure the compatible Instrument is connected to the PC. Right mouse click the Test Sequence name in the <u>Main Window</u> and select **Upload Test Sequence**.

PATGuard 3

Test Sequence 1	
	Add Test Sequence
	Upload Test Sequence
	Details
	Delete

Test Sequence Options

Changing Test Sequences

Test Sequences can be changed at any time by double-clicking the Test Sequence name in the <u>Main</u> <u>Window</u> or by right-clicking on the Test Sequence in the <u>Main Window</u> and selecting **Details...** This will bring up the <u>Test Sequence Details window</u>.

Deleting Test Sequences

Test Sequences can be deleted by selecting them in the <u>Main Window</u>, and pressing **Delete**. You can also delete a Test Sequence by right clicking the Test Sequence in the <u>Main Window</u> and selecting **Delete**. You will be prompted for confirmation.

PATGuard3	
?	Are you sure you want to permanently delete the selected item(s) from the database?
	OK Cancel

Delete Test Sequences Confirmation

Data Transfer

3 Data Transfer

The Data Transfer functions of PATGuard 3 are accessible from the Data Transfer Menu and are as follows:

File Da	ta Transfer	Fun	ctions	Help	
Download Upload	PAT	CSV	PAT	CSV CSV	CSV Import
from tester to tester					CSV
Data Transfer	Export to	File	Emai	l File	Import

Data Transfer Menu

- Downloading From Your Tester
 - o Downloading Apollo Series

- o Downloading Supernova / Europa
- o Downloading PrimeTest 350 / 300
- o <u>Downloading General Instructions</u>
- o Finding the Correct COM port
- o Preview (PAT Data Only)
- o <u>Duplicate Assets</u>
- Uploading To Your Tester
 - o Uploading Apollo Series
 - o Uploading Supernova / Europa
 - o Uploading PrimeTest 350 / 300
 - o Uploading General Instructions
- Export to File PAT or CSV
- Email File PAT or CSV
- Import CSV
- Backing Up Your Database

There are also a number of other features of PATGuard 3 that are related to data transfer:

- <u>Create a New Database</u>
- Open an Existing File
- <u>Upgrading / Importing a Legacy Database</u>

Click on the links above for more information about each option.

Downloading from Your Tester

3 Downloading from Your Tester

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

The Data Transfer functions of PATGuard 3 are accessible from the Data Transfer Menu and are as follows:

File Da	ta Transfer	Fun	ctions	Help	
Download Upload	PAT	csv CSV	PAT	CSV	Import CSV
Data Transfer	Export to	File	Emai	l File	Import

Data Transfer Menu

Note; results that have already been downloaded to PATGuard 3 and then <u>Uploaded</u> ready for a test cannot be downloaded again.

These assets sit in a different section of the memory and only have information to allow a retest to be performed - they do not contain full test data.

- <u>Downloading Apollo Series</u>
- <u>Downloading Supernova / Europa</u>
- Downloading PrimeTest 350 / 300
- <u>Downloading General Instructions</u>
- Finding the Correct COM port
- Preview (PAT Data Only)
- Duplicate Assets

Downloading - Apollo Series

3 Downloading - Apollo Series

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

To perform the download from an <u>Apollo Series</u> Instrument to PATGuard 3, the first step is to download the data file on the instrument, before completing the download into PATGuard 3.

Note 1; the Apollo Series download produces a .gar file which is used by PATGuard 3 during the download.

Note 2; make sure you have the latest version of firmware on your Apollo Series instrument.

Downloading the Data File from the Apollo Series Instrument

On the Apollo "Home Screen" 🛄 select menu/options, function key "F4".

In the menu select "Download" by using the arrow keys or selecting, key number "5".

In the "**Download from Apollo**" field select "**To PATGuard**", using the arrow keys to select from the dropdown menu.



(b) In the "using:-" field select "

Flash Memory Stick" (Apollo 600 only).

Add or alter the filename in the "**Filename**" field. Note if you are having problems downloading you could try changing the filename from "ApolloDownload" to a filename of your choice.

(a) Connect the USB lead between the PC and Apollo (for the Apollo Series).

or

(b) You will be prompted to "Insert USB memory stick...." any data on this memory stick will be displayed in the bottom box (Apollo 600 only).

You now have a choice of either downloading all data "F4" a or filtering by selecting "F2". (Apollo 500 or 600 only).

Note: If filtering the data, select the filters you wish to apply using the arrow keys and press accept "F4".

The download is complete after the blue bar reaches 100% and either:-

(a) the file appears in an additional Apollo drive (for example Apollo F:) that will now appear on your PC. This can be viewed using "Windows Explorer" (for the Apollo Series).

or

(b) the file appears on the memory stick, remove the memory stick from the Apollo and transfer it to the PC (Apollo 600 only).

Downloading the Apollo Data File to PATGuard 3

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

To Download from your instrument select **Download from tester** from the <u>Data Transfer</u> menu.



Data Transfer - Download from tester

Select the Apollo Series Test Instrument you configured earlier, from the dropdown. Note, if applicable, the **COM Port:** field will be replaced with a field called **Source File:**.

PAT	Gua	rd	3
-----	-----	----	---

Download	23
Test Instrument:	Seaward Apollo 600 12A-3456 🔹 👻
Source File:	
	Browse
Download to	
Oat	tabase 💿 File
Client:	< Auto >
Site:	< Auto >
📝 Preview (PAT D	ata Only) OK Cancel

Apollo Download window

Select **Browse...** and search for the directory, which contains the .gar file created when <u>Downloading the</u> <u>data File from the Apollo Series Instrument</u>). The location of the download file depends on how the download was performed, for example either **USB-PC Lead** or **USB Flash Memory Stick**.

The download file format for from the Apollo series is a .gar file (for example **ApolloDownload.gar**) and this file needs to be displayed in the **File name:** field.

(a) USB-PC Lead - the file appears in an additional Apollo drive, for example APOLLO600 (F:), that will appear on your PC.

Note; this drive only exists when the Apollo instrument remains in the download menu and the blue bar is at 100%

5 Open		23
Computer > Ap	ollo (E:) 🕨 ApolloDownload 👻	4 Search admin_20171114_43E-0 ₽
Organize 🔻 New folder		ii • 🗊 🔞
Computer Cos (C:) DVD RW Drive (D:) Apollo (E:) ApolloDownload	Name ApolloDownload.gar	Date modified Type 14/11/2017 09:40 GAR File
File name:	* * III	Downloads (*.gar) Open Cancel

Open window

(b) USB Flash Memory Stick - the file appears on the memory stick, for example Removable Disk (E:), remove the memory stick from the Apollo and transfer it to the PC (this can only be done with the Apollo 600).

PATGuard 3

5 Open					X
Computer > FLASH	STICK (E:)	 ApolloDownload 	▼ ⁴ 7	Search ApolloDownload	٩
Organize 🔻 New folder				8== -	
🐏 Computer 🏭 OS (C:)	^	Name		Date modified	Туре
BVD RW Drive (D:)		ApolloDownload.gar		14/11/2017 10:27	GAR File
FLASH STICK (E:)					
ApolloDownload					
	E				
File name:			•	Downloads (*.gar)	•
					incel
			-		

Open window

Select **Open**, and this will place the .gar file selected the **Source File:** field, for example (using **USB-PC** Lead);

Test Instrumen	t: Seaward Apollo 600 12A-3456 👻
Source File:	
	nload\ApolloDownload.gar
	Browse
- Download to	
۲) Database 💿 File
Client	
Client:	< Auto > 🗸
Site:	< Auto >
	AT Data Only) OK Cancel

Apollo Download window

To download to PATGuard 3, ensure **Database** is selected in the **Download to** section and if required select a **Client** or **Site** you want the test results to be downloaded to.

Note; Selecting **File** in **Download to** allows the location to be selected where the Apollo .gar file can be saved to - this selection does not download data into PATGuard 3.

Select **OK** to complete the download.

Note, if the <u>Preview (PAT Data Only)</u> box is ticked this will show the PAT data in a spreadsheet on the PC before the download is completed. In this window test results can be edited using the buttons and to complete the download **Process** needs to be selected.

Date	Asset ID	Site	Location	Person	Comments	Overall Result
05/10/2016	00001	Site 1	Location 1	admin	9ac	Pass
05/10/2016	00002	Site 1	Location 1	admin	9AC	Pass
05/10/2016	00003	Site 1	Location 1	admin	9acc	Pass
05/10/2016	00004	Site 1	Location 1	admin	9ACC	Pass
05/10/2016	00005	Site 1	Location 1	admin	9ACC	Pass

Download Preview window

Downloading - Supernova / Europa

3 Downloading - Supernova / Europa

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

The download from a Supernova or Europa to PATGuard 3 requires a serial (RS232) connection.

Option1 - Straight Through RS232 connection

The serial (RS232) cable should be the Seaward supplied serial cable. It will have a white tag, with the information printed. "For use with the following testers, both Up & Download Only, Supernova....". On the other side the Part No. **194A919** or **44B113**.

Option2 - Using a USB Adaptor

The Supernova / Europa can be downloaded to a PC with a USB port. This is achieved using the Seaward USB adaptor, which needs to be connected to the original lead of Option 1 - this only works as a two part lead.



Seaward RS232 to USB Adaptor

The Seaward USB Adaptor requires a driver to be installed on your PC prior to use. The driver software (for Seaward USB Adaptors only) can be found at the following link: <u>http://www.ftdichip.com/Drivers/VCP.htm</u>

Downloading the Supernova / Europa into PATGuard 3

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

To Download from your tester select **Download from tester** from the **Data Transfer** menu.



Select the Instrument you configured earlier, from the dropdown

PAT	Gua	rd	3
-----	-----	----	---

Download	
Test Instrument:	Seaward Supernova Elite 23B-4567 💌
COM Port: 🥜	COM1 Settings
Download to	itabase 💿 File
Client:	< Auto >
Site:	< Auto >
V Preview (PAT D	Data Only) OK Cancel

Download window

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, for addition help see <u>Finding the correct COM port</u>

Note 1; selecting **Settings..**, displays the Communications setup window (also available in <u>configure your Test Instrument</u>). Changes / updates to the serial settings can be made here.

Note 2; the actual settings in this window must match the settings on the instrument (**Bits per second** is also known as **BAUD RATE** on the instrument).

X
9600 -
8 🔹
None
2 -
OK Cancel

Communications window

To download to PATGuard 3, ensure **Database** is selected in the **Download to** section and if required select a **Client** or **Site** you want the test results to be downloaded to.

Note; selecting **File** in **Download to** allows the Supernova / Europa download file (.gar .sss file) to be saved on the PC - this selection does not download data into PATGuard 3.

Select **OK** and a **Please start transmission now..** message will be displayed.

Download	23
Please start the transmission now	
Cancel	

Communications window

You will now need to configure your tester for the download.

At the main menu, scroll down to "Download Results", and press the green button.

At this point a screen will pop up, ensure your screen is set the same as PATGuard 3 (for an example see below). Changes can be made by highlighting the required function, then pressing the Green Button to scroll through.



Supernova / Europa Download Options Screen

Once your tester is set to the correct parameters select **OK**, you will then be taken to a search function.

Set the search parameters as required or to download everything from the tester leave the screen as it first appears. Press the soft key directly below the Start Search option on the screen.

A process bar will show up on the screen of the tester, and within PATGuard 3 you should see an indication of data being received, as shown below.

Download	23
Received 7488 bytes	
Cancel	

Communications window

Note, if the <u>Preview (PAT Data Only)</u> box is ticked this will show the PAT data in a spreadsheet on the PC before the download is completed. In this window test results can be edited using the buttons and to complete the download **Process** needs to be selected.

Date	Asset ID	Site	Location	Person	Comments	Overall Result
05/10/2016	00001	Site 1	Location 1	admin	9ac	Pass
05/10/2016	00002	Site 1	Location 1	admin	9AC	Pass
05/10/2016	00003	Site 1	Location 1	admin	9acc	Pass
05/10/2016	00004	Site 1	Location 1	admin	9ACC	Pass
05/10/2016	00005	Site 1	Location 1	admin	9ACC	Pass

Download Preview window

Downloading - PrimeTest 350 / 300

3 Downloading - PrimeTest 350 / 300

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

The download from a PrimeTest 350 to PATGuard 3 can require a serial (RS232) connection.

Option1 - Straight Through RS232 connection

The serial (RS232) cable should be the Seaward supplied serial cable. It will an RS232 socket on one side and an audio type plug on the other which connects to the instrument.

Option2 - Using a USB Adaptor

The PrimeTest 350 can be downloaded to a PC with a USB port. This is achieved using the Seaward USB adaptor, which needs to be connected to the original lead of Option 1 - this only works as a two part lead.



Seaward RS232 to USB Adaptor

The Seaward USB Adaptor requires a driver to be installed on your PC prior to use. The driver software (for Seaward USB Adaptors only) can be found at the following link: <u>http://www.ftdichip.com/Drivers/VCP.htm</u>

Downloading the PrimeTest 350 / 300 into PATGuard 3

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

To Download from your tester select **Download from tester** from the **Data Transfer** menu.



Select the Instrument you configured earlier, from the dropdown

PAIGuard 3	ATGuard	3
------------	---------	---

Download	
Test Instrument:	Seaward PrimeTest 350 34C-5678 -
COM Port: 🥝	COM12 Settings
Download to	atabase 🔘 File
Client:	< Auto > 💌
Site:	< Auto >
Preview (PAT [Data Only) OK Cancel

Download window

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, for addition help see <u>Finding the correct COM port</u>

Note 1; selecting **Settings..**, displays the Communications setup window (also available in <u>configure your Test Instrument</u>). Changes / updates to the serial settings can be made here.

Note 2; the actual settings in this window must match the settings on the instrument (**Bits per second** is also known as **BAUD RATE** on the instrument).

Test Instrument	22
Communications	
Bits per second:	57600 💌
Data bits:	8 •
Parity:	None
Stop bits:	2 •
	OK Cancel

Communications window

To download to PATGuard 3, ensure Database is selected in the Download to section and if required

select a Client or Site you want the test results to be downloaded to.

Note; selecting File in Download to allows the PrimeTest 350 download file (.sss .gar file) to be saved on the PC - this selection does not download data into PATGuard 3.

Select OK and a Please start transmission now.. message will be displayed.

Download	23
Please start the transmission now	
Cancel	

Communications window

You will now need to configure your tester for the download.

At the main menu, scroll down to Data Transfer >, and press F4 to confirm (OK).

Then select Download to PC and confirm by pressing F4.

ф ф	11:21:33	
Auto Mode Manual Mode > Data T Dewnload to Upload from Send/Received	ont. Limit 0.10 ohm Ins Limit 1.0 Mohm PC n PC ve Config Data	
Configu User C About	.ogo	
Help Esc	OK	

PrimeTest 350 Screen

On the next screen ensure the transfer characteristics are set.

Format PATGuard SSS.

Computer Either the Computer name if Bluetooth, or RS-232 if using the cable to transfer. Baud

57600 (this can be altered but the same Baud rate must be set in PATGuard 3).

PATGuard 3

Down	nload to	PC	
Format PAT	Guard S	SS	
Computer	RS-232		<>
Baud	57600		\diamond
No. of as	sets	31	
Connected			
Esc		Send	
LSC		Send	

PrimeTest 350 Download to PC Screen

Once connected the test data can be downloaded using the F4 key.

A process bar will show up on the screen of the tester, and within PATGuard 3 you should see an indication of data being received, as shown below.

Download	23
Received 7488 bytes	
Cancel	

Communications window

Note, if the <u>Preview (PAT Data Only)</u> box is ticked this will show the PAT data in a spreadsheet on the PC before the download is completed. In this window test results can be edited using the buttons and to complete the download **Process** needs to be selected.

Date	Asset ID	Site	Location	Person	Comments	Overall Result
05/10/2016	00001	Site 1	Location 1	admin	9ac	Pass
05/10/2016	00002	Site 1	Location 1	admin	9AC	Pass
05/10/2016	00003	Site 1	Location 1	admin	9acc	Pass
05/10/2016	00004	Site 1	Location 1	admin	9ACC	Pass
05/10/2016	00005	Site 1	Location 1	admin	9ACC	Pass

Download Preview window

Downloading - General Instructions

3 Downloading - General Instructions

Please note; these are General Instructions for instrument download, using an RS232 lead, and not all functions may be available in all cases.

Specific download instructions for the <u>Apollo Series</u>, <u>Supernova / Europa</u> and <u>PrimeTest 350 / 300</u> are described in other sections.

Before attempting to download any instrument please make sure you have either created a new database (you can use the <u>Setup Wizard</u> for this) or have an <u>Existing Database Open</u>. In addition, make sure you <u>configure your Test Instrument</u>.

To Download from your tester select **Download from tester** from the <u>Data Transfer</u> menu.



Data Transfer - Download from tester

Select the Instrument you configured earlier, from the dropdown

Download	23
Test Instrument:	Clare SafeCheck 8 45A-6789
COM Port: 🕜	COM1 Settings
Download to	abase 🔘 File
Client:	< Auto >
Site:	< Auto >
📝 Preview (PAT Da	ata Only) OK Cancel

Download window

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, for addition help see Finding the correct COM port

Note 1; selecting **Settings..**, displays the Communications setup window (also available in <u>configure your Test Instrument</u>). Changes / updates to the serial settings can be made here.

Note 2; the actual settings in this window must match the settings on the instrument (**Bits per second** is also known as **BAUD RATE** on the instrument).

Test Instrument	X
Communications	
Bits per second:	9600 -
Data bits:	8 -
Parity:	None
Stop bits:	2 🗸
	OK Cancel
	·

Communications window

To download to PATGuard 3, ensure **Database** is selected in the **Download to** section and if required select a **Client** or **Site** you want the test results to be downloaded to.

Note; if available, selecting **File** in **Download to** allows the .gar/sss file to be saved on the PC - this selection does not download data into PATGuard 3.

Select OK and a Please start transmission now.. message will be displayed.

Download	23
Please start the transmission now	
Cancel	

Communications window

You will now need to configure your tester for the download, see your instrument user manual for further help.

A process bar will show up on the screen of the tester, and within PATGuard 3 you should see an indication of data being received, as shown below.

PATGuard 3

Download	23
Received 7488 bytes	
Cancel	

Communications window

Note, if the <u>Preview (PAT Data Only)</u> box is ticked (if applicable to your instrument(this will show the PAT data in a spreadsheet on the PC before the download is completed. In this window test results can be edited using the buttons and to complete the download **Process** needs to be selected.

Date	Asset ID	Site	Location	Person	Comments	Overall Result
05/10/2016	00001	Site 1	Location 1	admin	9ac	Pass
05/10/2016	00002	Site 1	Location 1	admin	9AC	Pass
05/10/2016	00003	Site 1	Location 1	admin	9acc	Pass
05/10/2016	00004	Site 1	Location 1	admin	9ACC	Pass
05/10/2016	00005	Site 1	Location 1	admin	9ACC	Pass

Download Preview window

Finding the Correct COM port

I Finding the Correct COM port

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, however the basic principal will work with all Operating Systems.

Firstly, without your <u>Instrument</u> connected, open Device Manager from the Control Panel and expand the **Ports (COM & LPT)** section to show the currently connected ports.

PATGuard 3



Device Manager - No Instrument connected

Now connect your Instrument and wait for your computer to recognise it. You should see a new COM port listed in the Device Manager. In this case, the Instrument appears as **USB Serial Port (COM10)**.

PATGuard 3



Device Manager - Instrument on COM10

In this case, when <u>Downloading</u> or <u>Uploading</u> to this Instrument, COM10 is the correct COM port to use. If you encounter problems communicating with your Instrument, make sure the <u>Communications settings</u> are correct.

Preview (PAT Data Only)

I Preview (PAT Data Only)

The download Preview can be selected from the Download window.
PATGuard 3

Download	23
Test Instrument: Source File:	Seaward Apollo 600 12A-3456 🔹
Download to	Browse
Client: Site:	tabase O File Auto >
Preview (PAT D	ata Only) OK Cancel
Download	23
Test Instrument:	Seaward Supernova Elite 23B-4567 💌
COM Port:	COM1 Settings
Download to	tabase 💿 File
Client:	< Auto >
Site:	< Auto >
Preview (PAT D	
Download window	or RS232 Connected Instrument window

Preview allows you to review and edit the downloaded data prior to adding it to the database. You can edit the details of a test, delete a test and replace all occurrences of a site or location name in the data.

Process processes the download data into the current database.

Cancel closes the Preview and does not process the data.

Date	Asset ID	Site	Location	Person	Comments	Overall Result
05/10/2016	00001	Site 1	Location 1	admin	9ac	Pass
05/10/2016	00002	Site 1	Location 1	admin	9AC	Pass
05/10/2016	00003	Site 1	Location 1	admin	9acc	Pass
05/10/2016	00004	Site 1	Location 1	admin	9ACC	Pass
		02.4	1	i duta	0100	
05/10/2016	00005	Site 1	Location 1	admin	9ACC	Pass
05/10/2016	00005	Site I	Location I	admin	3400	Pass



Duplicate Assets

3 Duplicate Assets

When <u>Downloading from your tester</u>, if duplicate items exist PATGuard 3 will alert you and ask you to confirm what action you would like to take.

During a download if a Test Result with the same **Asset ID** and **Site** is detected a **Duplicate?** warning message is displayed to determine if the second and subsequent Test Results are additional Test Results for the same Asset or a duplicate test.

Selecting **Yes** to the question **Duplicate?** will cause the second Test Result to be re-routed to a specially created holding **Site** (for example Duplicate-xxx) to be <u>deleted</u> or <u>amended</u> by the user. This can also be <u>moved</u> into a new **Site** / **Location**.

Selecting **No** to the question **Duplicate?** will cause the second Test Result to be appended to the first Test Results Asset record. To view this latest result, and the previous, the <u>Asset Details</u> will need to be viewed.

Note; if downloading to a different **Client** level the duplicate Asset ID is ignored.

Uploading to Your Tester

3 Uploading to Your Tester

To Upload to your tester, first <u>configure your Test Instrument</u>. Then select **Upload from tester** from the <u>Data Transfer</u> menu.

The Data Transfer functions of PATGuard 3 are accessible from the Data Transfer Menu and are as follows:

File Da	ta Transfer	Functions	Help	
Download Upload from tester to tester	PAT CS	SV PAT	CSV CSV	Import
Data Transfer	Export to Fi	le Ema	ail File	Import

Data Transfer Menu

Note; results that have already been downloaded to PATGuard 3 and then <u>Uploaded</u> ready for a test cannot be downloaded again, unless they have been retested. These assets sit in a different section of the memory and only have information to allow a retest to be performed - they do not contain full test data.

- <u>Uploading Apollo Series</u>
- <u>Uploading Supernova / Europa</u>
- Uploading PrimeTest 350 / 300
- <u>Uploading General Instructions</u>

Uploading - Apollo Series



To Upload to your Apollo Series tester, first make sure you configure your Test Instrument.

Note 1; Upload is only available with the Apollo 500 and Apollo 600

Note 2; the <u>Apollo Series</u> upload produces a .gar file which is used by PATGuard 3 during the data transfer.

Note 3; make sure you have the latest version of firmware on your Apollo Series instrument.

Before attempting an upload, if you have not already, we suggest you perform a <u>download</u> from your Apollo 500 / Apollo 600 to PATGuard 3, as this will confirm your PATGuard 3 software / database is working correctly.

Preparing the Apollo Series Instrument for Upload

On the Apollo "Home Screen" 🔟 select menu/options, function key "F4" 💷

In the menu select "Upload" by using the arrow keys or selecting, key number "7" 🛸.

In the "Upload data into Apollo" field select "From PATGuard 3", using the arrow keys to select from the dropdown menu.

In the "using:-" field select " USB-PC cable". An additional Apollo drive (for example ApolloXXXX) will appear on your PC. (Apollo **500** or **600**)

or

In the "using:-" field select "Flash Memory Stick" (Apollo 600 only)

Setting up PATGuard 3 to Upload

In the Data Transfer menu highlight the Client, Site or Location that you want to be uploaded. Then select

Upload from tester.



Note; if the **Upload to tester** icon is greyed out, make sure you have either a **Client**, **Site** or **Location** highlighted.

This will open the Upload window.

	X
Destination:	Seaward Apollo 600 12A-3456 🔹
Unit Drive:	APOLLO600 (F:)
Upload	
	Assets
Client	< None >
Site	Site 1
Location	< All >
	Data To Include
🔽 PAT Te:	sting data 🛛 🔲 Universal Risk Assessment data
📃 Site Rep	orts 🔲 Photos
Visual or	nly OK Cancel

Upload Window

Make sure the Apollo Series instrument you wish to upload is selected,

Select the correct drive from the dropdown, this will be either be;

```
the ApolloXXXX: drive (Apollo 500 or Apollo 600)
```

or

a Flash Memory Stick drive (Apollo 600)

Select a **Client**, **Site** or **Location**, you want to upload (if required) and include the data to be included (where applicable) - press **OK**.

A message saying - "File Saved Successfully :\ApolloUpload.gar" should appear on the PC

PATGuard3	
File Saved Success	fully : F:\ApolloUpload.gar
	ОК

Upload Confirmation Window

Completing the Apollo Series Upload

On the Apollo the message "Save data to Apollo drive, press F3 when done" – select using the

function key **"F3"** in the following message will then appear on the Apollo "Valid Data files from PC. Select one of these files and press F4". Select the file containing your uploaded data (/

ApolloUpload.gar), using the arrows keys, and save by selecting "**F4**" [] (USB-PC cable, Apollo **500** or **600**).

or

After transferring the USB memory stick (you will receive a message if you have not done this), in the field below "Valid data files from USB memory stick. Select one of these files and press F4" - select the file containing your uploaded data (/ApolloUpload.gar), using the arrows keys, and save

by selecting "F4" 🔲 (Flash Memory Stick, Apollo 600 only).

Note: When selecting one from multiple files please ensure the correct file is highlight.

A message saying ".gar file/SSS data uploaded OK" will be shown on the Apollo.

The uploaded data is stored and displayed in a different location to the already tested data: On the

Apollo "Home Screen" \square select menu/options, function key "**F4**" \blacksquare , select "View Data", by selecting number "**1**" \blacksquare and then the filter button by selecting "**F2**" \frown . In the "Select Tests" section select "Uploaded Data" using the blue arrow keys and accept using the function key "**F3**"

. In this new list all the uploaded data will be displayed.

Uploading - Supernova / Europa

Uploading - Supernova / Europa

To Upload to your Supernova / Europa, first make sure you configure your Test Instrument.

Before attempting an upload, if you have not already, we suggest you perform a <u>download</u> from your instrument to PATGuard 3, as this will confirm your PATGuard 3 software / database is working correctly.

The PATGuard Upload feature can be used to transfer **Asset** information to a Supernova / Europa to simplify retesting. Information including the **Asset ID**, **Description**, **Test Sequence**, **Site** and **Location** can be uploaded from PATGuard into the instrument.

When an **Asset ID** is entered on Supernova / Europa **Asset Details** screen, the assets stored in upload memory are automatically searched for a matching **Asset ID**. If a match is found the uploaded asset data is retrieved and shown on the instrument display.

Preparing the Supernova / Europa to Receive an Upload



In the Supernova / Europa, select REMOTE MODE from the Main Menu

REMOTE MODE from Main Menu

In REMOTE MODE an ESTABLISHING COMMUNICATION message will be displayed.



REMOTE MODE Menu

Preparing PATGuard 3 for an Upload from the Supernova / Europa

In the <u>Data Transfer</u> menu highlight the **Client**, **Site** or **Location** that you want to be uploaded. Then select **Upload from tester**.



Data Transfer - Upload to tester

Note; if the **Upload to tester** icon is greyed out, make sure you have either a **Client**, **Site** or **Location** highlighted.

This will open the Upload window.

PATGuard 3

	X
Destination:	Seaward Supernova Elite 23B-4567 🔹
COM Port:	COM12 ▼ Settings
Upload	
	Assets
Cl	
Client	< None >
Site	Site 1 🗸
	[· All ·
Location	< All >

Make sure the <u>Instrument</u> you wish to upload is selected, the <u>COM port</u> used and the **Client**, **Site** or **Location** you wish to upload and select **OK**.

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, for addition help see <u>Finding the correct COM port</u>

Note; selecting **Settings..**, displays the Communications setup window (also available in <u>configure</u> <u>your Test Instrument</u>). Changes / updates to the serial settings can be made here.

Test Instrument	X
Communications	
Bits per second:	9600 💌
Data bits:	8 🔹
Parity:	None
Stop bits:	2 🔹
	OK Cancel

COM Port Settings Window

Once **OK** on the PATGuard Upload window is selected a message regarding connection is shown.



Upload Connections Message

A progress bar will appear on the PATGuard screen to show the data transfer.

	23
0%	
Cancel	

Upload Progress Bar

When the data is transmitting the progress bar will scroll until it reaches 100%, after this an upload complete message is displayed.



Upload Complete Message

Completing the Upload to the Supernova / Europa

Once the upload has started a READY : SSS COMMAND MODE message will be shown on the instrument.



Upload from PC Menu

The uploaded data is stored in a different memory location than the tested data and cannot be searched.

On the Supernova or Europa the uploaded assets cannot be viewed until they have test data against them. When performing a retest simply go to NEW TEST and press the YES button. You will then need to enter the asset ID (either manually or using your CCD barcode scanner) to bring up the asset information.

Uploading - PrimeTest 350 / 300

Juploading - PrimeTest 350 / 300

To Upload to your PrimeTest 350 / 300, first make sure you configure your Test Instrument.

Before attempting an upload, if you have not already, we suggest you perform a <u>download</u> from your PrimeTest 350 / 300 to PATGuard 3, as this will confirm your PATGuard 3 software / database is working correctly.

The PATGuard Upload feature can be used to transfer *Asset* information to a Seaward PrimeTest 350 to simplify retesting. Information including the *Asset ID*, *Description*, *Test Sequence*, *Site* and *Location* can be uploaded from PATGuard into the PrimeTest 350.

When an **Asset ID** is entered on PrimeTest 350 **Asset Details** screen, the assets stored in upload memory are automatically searched for a matching **Asset ID**. If a match is found the uploaded asset data is retrieved and shown on the PrimeTest 350 display.

Preparing the PrimeTest 350 / 300 to Receive an Upload

In the PrimeTest 350 / 300, select Menu (F4), Data Transfer and then Upload from PC

$R_{_{PE}}$	₽			
<u>A</u> uto Mo <u>M</u> anual			tion 5 s imit 0 10	ohm
Data T View S Memor Configu User C About	Download <mark>Upload fr</mark> Send/Rec Load TnT Clone Da	l to PC om PC :eive Cont : Logo		Ω
Help	Esc		ОК	

Upload Selection from Main Menu

Check that the correct setting is shown in the **Computer** field i.e. **RS-232** when using a cable connection or the PC name when using Bluetooth. You should see a **Connected** message on the instrument.

	——Upl	oad fro	m P()——		٦¥
	Computer RS-232 🛛 🔊					
	Baud 57600 <>					
	No. of a	ssets				
Connect	ed					
	Esc					

Upload from PC Menu

Preparing PATGuard 3 for an Upload from the PrimeTest 350 / 300

In the <u>Data Transfer</u> menu highlight the **Client**, **Site** or **Location** that you want to be uploaded. Then select **Upload from tester**.



Data Transfer - Upload to tester

Note; if the **Upload to tester** icon is greyed out, make sure you have either a **Client**, **Site** or **Location** highlighted.

This will open the Upload window.

PAT	Gua	rd	3
-----	-----	----	---

	X
Destination:	Seaward PrimeTest 350 34C-5678 🔹
COM Port:	COM12 ▼ Settings
Upload	
	Assets
Client	< None >
Site	Site 1
Location	< All > •
🔲 Visual or	nly OK Cancel

Make sure the <u>Instrument</u> you wish to upload is selected, the <u>COM port</u> used and the **Client**, **Site** or **Location** you wish to upload and select **OK**.

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, for addition help see <u>Finding the correct COM port</u>

Note 1; selecting **Settings..**, displays the Communications setup window (also available in <u>configure your Test Instrument</u>). Changes / updates to the serial settings can be made here.

Note 2; the actual settings in this window must match the settings on the instrument (**Bits per second** is also known as **BAUD RATE** on the instrument).

Test Instrument	23
Communications	
Bits per second:	57600 💌
Data bits:	8 •
Parity:	None
Stop bits:	2 •
	OK Cancel

COM Port Settings Window

Once **OK** on the PATGuard Upload window is selected a message regarding connection is shown.



Upload Connections Message

A progress bar will appear on the PATGuard screen to show the data transfer.

Upload	23
Uploading	
0%	
Cancel]

Upload Progress Bar

When the data is transmitting the progress bar will scroll until it reaches 100%.

Completing the Upload to the PrimeTest 350 / 300

The **Asset ID** numbers will appear on the PrimeTest 350 / 300 display as they arrive until Upload is complete and the **End of Data** message appears below the last **Asset ID**.

		oad fro		PC 	 	ĪX
	Compute	er RS-2	32		<>	
	Bau	d 5760()		<>	
	No. of a	ssets		70		
A001002 A001001 End of						
	Esc					

Upload from PC Menu

The total number of Assets uploaded will be shown in the No. of assets field – in this case 70 Assets have been uploaded.

The number of Assets in upload memory can be view be selecting **Menu** (F4) then **Memory Options**. In this case there are a total of 189 Assets in the upload memory.



Memory Information Menu

The Assets in upload memory can be viewed using the **View Saved Data** option on the PrimeTest 350 as follows. Press **Menu** (F4), **View Saved Data**, **Search** (F1) and change the **Test Status** field to **Uploaded** as shown.



Memory Search Filter

Press **OK** (F4) to show all Assets in the upload memory. Uploaded Assets are marked with a "**U**" on the right hand side of the display.

I	s	<u> </u>	w Saved I sults	Data (189 / C	
	A00 A00 A00 A00	1066 1065	Durhar Durhar Durhar Durhar	n Fact n Fact	
5	Search	Esc	Options	Select	

Uploaded Data on Instrument

Uploading - General Instructions

3 Uploading - General Instructions

To Upload to your tester, first make sure you configure your Test Instrument.

In the <u>Data Transfer</u> menu highlight the **Client**, **Site** or **Location** that you want to be uploaded. Then select **Upload from tester**.



Note; if the **Upload to tester** icon is greyed out, make sure you have either a **Client**, **Site** or **Location** highlighted.

This will open the Upload window.

PAT	Gua	rd	3
-----	-----	----	---

	X
Destination:	Seaward PAT2000i 12A-9876 🔹
COM Port:	COM12 ▼ Settings
Upload	
	Assets
Client	< None >
Site	Site 1
Location	< All >
🔲 Visual on	ly OK Cancel

Upload window

Make sure the <u>Instrument</u> you wish to upload is selected, the <u>COM port</u> used and the **Client**, **Site** or **Location** you wish to upload and select **OK**.

The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, for addition help see <u>Finding the correct COM port</u>

Note 1; selecting **Settings..**, displays the Communications setup window (also available in <u>configure your Test Instrument</u>). Changes / updates to the serial settings can be made here.

Note 2; the actual settings in this window must match the settings on the instrument (**Bits per second** is also known as **BAUD RATE** on the instrument).

Test Instrument	X
Communications	
Bits per second:	9600 💌
Data bits:	8 🔹
Parity:	None
Stop bits:	2 •
	OK Cancel

COM port settings window

Note; In general the uploaded data is stored in a different memory location than the tested data and

in some cases and can only be searched in newer instruments.

Export to File - PAT or CSV

3 Export to File - PAT or CSV

Data in the PATGuard 3 database can be exported to either a <u>.pat Briefcase file</u> or a <u>.csv Spreadsheet</u>. See also <u>Open an Existing File</u>.

To Export to a File, select the <u>Client</u>, <u>Site</u> or <u>Location</u> you wish to export from the <u>Tree View</u>. Alternatively, to export a single <u>Asset</u> or <u>Hazard</u>, select that Asset or Hazard in the <u>Main Window</u>.

The data to be exported to a CSV file can be filtered by right mouse clicking on the column headers, in the <u>Main Window</u>, and selecting from the dropdown, for more information see <u>Asset View</u>.

Select to File from the <u>Data Transfer</u> menu.



Data Transfer Menu - Export

This will open the Save As window, which allows you to browse to the location you wish to export the file to.

3 Save As			×
C V V V V V V V V V V V V V V V V V V V	My Documents + Export	✓ 4 Search Expo	t p
Organize 👻 New folder			ii • 🔞
🔆 Favorites 💻 Desktop	Documents library Export	Arran	ge by: Folder 🔻
Downloads	Name	Date modified	Туре
Recent Places	Noite	ms match your search.	
🧮 Desktop		instructing our searching	
	< [
File name:			
Save as type: Briefcase files (*.pat)			-
Briefcase files (*.pat) Spreadsheet (*.csv) All Files (*.*)			
Hide Folders		Save	Cancel

Save As window

Exporting to .pat file

To export to a .pat file, select Briefcase files (*.pat) from the **Save as type:** drop-down box. .pat files can be used to transfer sections of the database to other PATGuard 3 users - see <u>Open an Existing File</u>. Note, the

other user of PATGuard 3 must be using exactly the same version of PATGuard 3.

Note; briefcase / .pat files can only be exported to exactly the same version of PATGuard 3 that they were originally created on.

Exporting to .csv file

To export to a .csv file, select Spreadsheet (*.csv) from the **Save as type:** drop-down box. .csv files can be opened and edited in programs such as Microsoft Excel.

Note: .csv exports do not include photos or risk assessments - just the test results and test dates.

Email File - PAT or CSV



Data in the PATGuard 3 database can be exported via email to either a <u>.pat Briefcase file</u> or a <u>.csv</u> <u>Spreadsheet</u>. See also <u>Open an Existing File</u>.

To Export to Email, select the <u>Client</u>, <u>Site</u> or <u>Location</u> you wish to export from the <u>Tree View</u>. Alternatively, to export a single <u>Asset</u> or <u>Hazard</u>, select that Asset or Hazard in the <u>Main Window</u>.

The data to be emailed to a CSV file can be filtered by right mouse clicking on the column headers, in the <u>Main Window</u>, and selecting from the dropdown, for more information see <u>Asset View</u>.

Select Email from the Data Transfer menu.



Data Transfer Menu - Email Export

This will open a new email in your default email program with the data you selected attached as a .pat or csv file.

See also <u>Open an existing file</u> for details on how to open a .pat file.

Import CSV

Import CSV

You can import data from a spreadsheet (csv) into PATGuard 3. This function is selected by the Import CSV in Data Transfer.



Data Transfer – Import CSV selection

You will need to use the ImportTemplate.csv found in the default directory, C:\Program Files\Seaward \PATGuard 3 to place your spreadsheet data into the correct format.

3 Open				23
OS (C:) > Program	Files (x86)	Seaward PATGuard 3	Search PATGuard 3	Q
Organize 🔻 New folder			100 -	1 0
Seaward PATGuard 2 Demo	^	Name	Date modified	Туре
PATGuard 3		ImportTemplate.csv	03/10/2017 15:24	Microsoft E
PATGuard Elements				
🎉 Safety e-Base Pro				
SolarCert Elements				
	E			
	-	•		•
File name: Impo	ortTempla	te.csv	 Import files(*.csv) 	-
			Open 🗸	Cancel
			- the second sec	

CSV Import Template - ImportTemplate.csv

X	🚽 🤊 - I	(≥ - =					Impo	ortTemplate.	csv - Micros	soft Excel							X
F	ile Ho	ome Ins	ert Page	Layout I	Formulas	Data R	leview \	/iew								۵ 🕜 🗆	đ i
ľ	کر ا س	Calibri	* 11	т А́ А́	. = =	≫	Wra	p Text	General		•	5		¦≕ Insert		27	ĥ
Pa	ste 🛷	BIU	· ·	🄕 - <u>A</u> -	ĒĒ		Mer	ge & Center	- 🗐 - १	/o • • •.00	.00 Con Form	ditional For atting ∗ as Ti	mat Cell able * Styles	1		Sort & Fin Filter * Sele	
Clip	board 🗔		Font	ſ	ā.	Align	ment		N N	umber	Es.	Style	5	Cells		Editing	
	A1		• (*	<i>f</i> _∗ Asse	t ID												
	A	В	С	D	E	F	G	Н	1	J	К	L	М	N	0	Р	
1	Asset ID	Descripti	c Site	Location	Make	Model	Group	Serial Nur	Test Perio	Last Full T	Last Full 1	Visual Per	Last Form	Last Visua	Test Code	Extended	Asse
2	SAMPLE0	Sample I	r SampleSit	Location 1	Xerox	LK45	Stationary	456-98S1Z	18 month	******	Passed	12 month	*****	Failed	1.23E+09	1.23E+09	Som
3	SAMPLEO	Sample I	n SampleSit	Location 2	Black & D	ecker		1234	6 months	******	Passed	3 months	*****	Failed	9.88E+09	9.88E+09	Oth
1																	

Import I emplate.csv - opened in Microsoft Excel

Note 1; Your PAT data needs to follow the template of this CSV file - you cannot alter the column

headers.

Note 2; Do not allow empty rows, between data rows, as this will produce false assets in PATGuard 3

Note 3; After using the template file, make sure it is saved again in the CSV file format.

In PATGuard 3 select Data Transfer and then Import and then select the ImportTemplate.csv

Your imported data should now be in PATGuard 3, however, if you cannot see all the data try right mouse clicking on the top right hand window and selecting the fields you require.

Backing Up Your Database

3 Backing up your database

To avoid losing data if anything happens to your PC, we recommend regularly backing up your PATGuard 3 database

Making a backup copy of your database

To make a backup of you database:

- 1. Close PATGuard 3 if it is open.
- 2. Open an Explorer window and browse to the location you specified when Setting up your database.
- 3. Right-click on the PATGuard 3 database file to bring up the context menu. Select Copy.
- 4. Browse to the location you wish to backup the database to, for example a memory stick or external hard drive. Right-click to bring up the context menu and select **Paste**.

You may alternatively choose to burn a copy of your database to a CD or DVD, or use one of the many online backup services to secure your valuable data.

Seaward recommends backing up your database on a regular basis, at least weekly if you use PATGuard 3 on a regular basis.

Restoring your database from a backup copy

To restore a database from a backup copy:

- 1. Copy the backup database to a suitable location on your PC.
- 2. Open the backup database following the procedure in Select an existing database.

Auto Scheduler

3 Auto Scheduler

The Auto Scheduler function of PATGuard 3 is accessible from the <u>Functions Menu</u> and provides a way to schedule testing based on a set of trigger conditions. The main features of the Auto Scheduler are as follows:

- Setting up a Schedule
- Viewing a Schedule
- Printing a Task Checklist

• <u>Uploading a Schedule</u>



Functions Menu - Auto Scheduler

When a database with an Auto Scheduler configuration is closed in PATGuard 3 a check is run on that database by PATGuard e-Scheduler (running in the PATGuard e-Manager program on the system tray). If the trigger conditions are met the configured action is taken. You can check the action taken by double

clicking on the PATGuard e-Manager icon 🔛 on the system tray to view its message log.

Click on the links above for more information about each option.

Setting up a Schedule

3 Setting up a schedule

To set up an <u>Auto Schedule</u>, switch to the <u>PAT Testing</u> function and select a <u>Client</u>, <u>Site</u> or <u>Location</u> from the <u>Tree View</u> in the <u>Navigation Pane</u>. Select **Auto Scheduler** from the <u>Functions Menu</u> to open the Auto Scheduler window.



Functions Menu - Auto Scheduler

Auto Scheduler window

The Auto Scheduler window allows you to select the Client Name, Site Name and Location Name that you wish to run an Auto Schedule for.

PATGuard 3

Auto Scheduler
Client Name: 🗸
Site Name: Site 1
Location Name: <pre></pre>
Schedule launch settings
 Exclude this level
Defer to next level up
Launch schedule when trigger conditions are met
Trigger conditions
Test type: Full tests only
All overdue
 Any overdue within period days
Percentage overdue
Pre Trigger: 0 weeks
OK Cancel

Auto Scheduler window

Schedule launch settings

Exclude this level excludes this part of the database from <u>Auto Schedules</u>. Sub-levels may be included if they have their own Auto Scheduler configuration. For example, it is possible to exclude a <u>Client</u> but have the <u>Auto Scheduler</u> configured for the <u>Sites</u> below that Client.

Defer up to next level takes the <u>Auto Scheduler</u> configuration from the level above. For example, all <u>Locations</u> at a <u>Site</u> could use the Auto Scheduler configuration for the Site.

Launch schedule when trigger conditions are met is used to configure particular Auto Scheduler actions for this level of the database. Only the <u>Local launch</u> should be selected.

Local launch

If a local schedule is triggered then the next time the database is opened a message will be displayed to say that a new schedule is available. The schedule can be <u>viewed</u>, <u>uploaded</u> or <u>printed</u>.

Trigger Conditions

Test type allows you to select whether the trigger should be based on Full tests only or Visual tests only.

If All overdue is selected, a trigger will occur only if all <u>Assets</u> are overdue at this branch of the database.

If **Any overdue within period** is selected, a trigger will occur if there are any overdue <u>Assets</u> at this branch of the database within the time specified.

If **Percentage overdue** is selected, a trigger will occur if more than the specified percentage of <u>Assets</u> are overdue at this branch of the database.

Pre Trigger allows you to specify the number of weeks in advance of the trigger becoming true you would like the schedule to be generated (e.g. 4 weeks before all items are overdue).

Viewing a Schedule

3 Viewing a schedule

When a database with an <u>Auto Scheduler</u> configuration is closed in PATGuard 3 a check is run on that database by PATGuard e-Scheduler (running in the PATGuard e-Manager program on the system tray). If the trigger conditions are met the configured action is taken. You can check the action taken by double

clicking on the PATGuard e-Manager icon 🔤 on the system tray to view its message log.

If a <u>local schedule</u> is triggered then the next time the database is opened in PATGuard 3 a message will be displayed to say that a new schedule is available.

PATGuard	x
	A new auto schedule is available. Would you like to view the schedule?
	Yes No

Auto Schedule notification

The schedule can be viewed, <u>printed</u> or <u>uploaded</u>. To view the Auto Schedule, select **Display** from the <u>Auto</u> <u>Schedule</u> menu on the <u>File menu</u>.



Auto Schedule menu

Printing a Task Checklist

Printing a task checklist

A Task Checklist can be printed by selecting **Print...** from the <u>Auto Schedule</u> menu on the <u>File menu</u>.



Auto Schedule menu

You can also print a Task Checklist by running a Concise Task Checklist Report.



Navigation Pane - Available Reports

Uploading a Schedule

IUploading a schedule

To Upload the data associated with an <u>Auto Schedule</u>, select **Upload** from the <u>Auto Schedule</u> menu on the <u>File menu</u>. You can choose to **Upload Full Tests** or **Upload Visual Tests**.



Auto Schedule menu

Note the instrument needs to be configured / ready for <u>upload</u> and this does not work with the Apollo Series instruments.

Time Manager

3 Time Manager

Welcome to PATGuard Time manager, the PAT test time analysis program for use with the Seaward Apollo

Series, Supernova, Europa and PrimeTest 300/350 family of testers. This program will analyse an .gar file/ SSS download file from the Apollo series, supernova, Europa and PrimeTest 300/350 type of testers and display test times.

The Time Manager function of PATGuard 3 is accessible from the View menu and provides a way to schedule testing based on a set of trigger conditions. The main features of the Time Manager are as follows:

- Program Overview
- How to open a file
- How to select data
- How to test data
- How to create a bar graph
- How to save the data
- How to print the data



View Menu - Time Manager

Program Overview

I Program overview

PATGuard Time Manager will enable the times of individual tests to be analysed and displayed. The program will process an .gar file/SSS file and display test information relating to dates and times of tests. An .gar file/SSS file contains all information concerning tests stored in the tester's memory. Once tests are stored they cannot be amended ensuring data security and veracity of the information is provided by PATGuard Time Manager.

Note

For added security make sure that the Date and Time are password protected in the tester, if available to stop Dates and Times from being altered prior to testing. (See tester user manual)

To analyse an .gar file/SSS file with PATGuard Time Manager, the three steps below are necessary:

- 1. Select and Open a File
- 2. Choose the appropriate search criteria to narrow or widen the file analysis
- 3. View the test data

Once the test data is displayed, it can be <u>printed</u> and <u>saved</u> into a spreadsheet file or displayed as a <u>bar</u> <u>graph</u>.

Note

Only .gar file/SSS files from Seaward Apollo series, Supernova, Europa or PrimeTest 300/350 type testers can be analysed by PATGuard Time Manager. These files are created from the tester download by

downloading to file in PATGuard or PATGuard Pus. The saved file can then be opened in PATGuard Time Manager to analyse test times.

How to Open a file

3 How to open a file

To analyse the test times of a download .gar file/SSS file, select the open icon or press (Ctrl + O) on your keyboard.





Open Icon -Time Manager

How to select data

3 How to select data

The following select window will be displayed.

🙏 📷 🔜 🛛 Time Manager - Select		ו	X
File View	s	tyle	• 🕜
Open Save Print Print Display Graph Back File Panel1			
File path: \AAAAAAA gar files\ApolloDownloadci.gar			^
Tester model: Apollo 600 Serial Number: 19G-0439 Site Location User Start Date 11/11/2015 End Date 13/11/2015			4 m
Status CAP	NUM	SCR	L

Select Window - Time Manager

Note

Not all .gar file/SSS files will contain Tester Model and Serial Number, this will be dependent on the software version of the individual tester from which the .gar file/SSS file was created.

The drop downs for Site, Location, User, Start and End dates will be specific to an individual .gar file/SSS file. Leave the wild card (*) characters to enable all values to be displayed or choose from the drop downs specific data selection criteria. Select Display to view the <u>Test Data</u> contained in the file according to the data selection.

How to test data

I How to test data

The following Test Data window will appear.

pen Save	Print Print	Display Graph Back Panel1			
ile path: J:\Ar	rfan\AAAAAA gar files\A Apollo 600	polloDownload2.gar	Serial Number: 24E-0397		
Date	Site	Location	Asset ID	Test Time	User
22/07/2015	Site 1	Location 1	10 norm	08:23	admin
22/07/2015		Location 1	11 norm	08:25	admin
22/07/2015		Location 1	12 risk	08:26	admin
22/07/2015	Site 1	Location 1	13 risk	08:28	admin
22/07/2015	Site 1	Location 1	14 risk	08:30	admin
22/07/2015	Site 1	Location 1	15	08:32	admin
22/07/2015	Site 1	Location 1	16 both	08:35	admin
otal Number o	of Tests: 7				
			Bar Graph	Save as File	Print << Back

Test Data -Time Manager

This is the Test Data found in the file. Select <u>bar Graph</u> to display the data in a graphical format. The data can also be saved as a spreadsheet file (csv) by selecting <u>Save as File</u>. For a <u>print out</u> of the data select print. Select back to return to the Select dialogue box to choose other data selection criteria.

How to create a bar graph

3 How to create a bar graph

The bar graph will give a clear visual indication of the time the tester was in use by individual users. The graph has a resolution of two minutes i.e. no test action for two minutes or more will show as a break in the bar.



Bar Graph -Time Manager

Select print to obtain a print out of the bar graph. Select back to view the Test Data.

How to save the data

3 How to save the data

The <u>Test Data</u> information can be saved as a spreadsheet file (csv) to enable other data display options or to save the selected data as a record.

📙 🚰 😹 🚽 Time Manager - Test Data							
5	File	View					
	R		Q				っ
Open	Save As	Print	Print Preview	Display	Gra	ph	Back
	File Panel1						
	Save As						
File path Save the active document with a							
	new name						
Tester n	Tester model: Apollo 600						

Save As	MAR A -			23
🗸 🗢 🥽 🕨 Librarie	5 🕨		- 4, Search Libraries	\$
Organize 🔻				- 0
Favorites	Libraries Open a library to see your files and arrange th	nem by folder, date, and other proper	ties.	
)& Downloads OneDrive Recent Places	Documents Library	Music Library	Pictures Library	
💻 Desktop	Videos Library			
File name:				
Save as type: Spr	adsheet (*.csv)			
Hide Folders			Save	Cancel

Save as icon and window -Time Manager

At the Test Data window select Save as File so the following Save As dialogue box is displayed. Save as File can also be launched from the save as icon or by selecting save as from the file drop down while the test data window is displayed. Choose a path and file name and select save to create the file.

How to print data

3 How to print the data

To print the <u>Test Data</u>, select the Print button at the test data or <u>bar graph</u> window. Print can also be launched from the print icon or by selecting print from the file drop down while the test data or bar graph window is displayed. All the Test Data displayed will be printed in a format similar to the Test Data or Bar Graph window.

A preview of the printed report is available while the Test Date or Bar Graph window is displayed, by selecting Preview from the File drop down.

	🔄 🚰 🔜 🛛 Time Manager - Test Data						
	5-	File	View				
	2	R		Q		-	う
-	Open	Save As	Print	Print Preview	Display	Graph	Back
	File Panel1						
	File path: J: \Arfa						_

Printer		
Name:	\\SELPRT01\Sales HP LaserJe	et P3015n F
Status:	Ready	
Type:	HP LaserJet P3010 Series PCL 6	5
Where:	Sales Dept.	
Comment:		Print to file
Print range		Copies
		Number of copies: 1
C Pages	from: 1 to:	
C Selecti	on	123 123 Collat

Print window -Time Manager

Support

3 Support

If you are having problems using PATGuard 3 software and cannot find an answer to your question in the Help file then you can <u>contact Seaward</u>.

To keep up to date with the latest PATGuard 3 news, get support from the Seaward team and other PATGuard 3 users, or to make suggestions for how we could improve PATGuard 3, please visit our online <u>forum</u>.

If you require technical support on any other Seaward products please visit our <u>website</u> which holds a bank of information on our testers, software and electrical safety testing in general.

Licensing

For specific queries about the PATGuard 3 licence, please refer to the following sections:

- Licence FAQs
- Licence Renewal
- General FAQs
- Licence Agreement

General PAT FAQs

For help with general Portable Appliance Testing please see:

Our Guide to PAT Testing: http://www.seaward.co.uk/userfiles/pat-testing-guide.php

Our Guide to Testing Class 1 and Class 2 equipment: http://www.seaward.co.uk/downloads/3584_pat_posters_2011_layout_2_v2.pdf

Licence FAQs



How long is left on my licence? Serial Number Confirmation How many PCs can the licence be used on? How do I transfer the licence? How do I extend my licence? How do I buy an additional licence? What happens when my licence expires?

How long is left on my licence?

Select **Licence...** on the <u>About Screen</u> to open the Licence Viewer. The Licence Viewer will display a list of Modules, including PATGuard 3. Next to the PATGuard 3 Module will be a licence expiry date (31/07/2017 in the example below);

🐴 Licens	se Viewer
M	Ianufacturer: Seaward Electronic Ltd
C	Company: Seaward
🛛 🖒 🗑 In	nstallation Codes - Copy protection activated(1)
🖉 🖌 🚰 M	todules
Þ	PATGuard 3 (3, License is valid until: 31/07/2017, Activation (done))
	🖥 Elite SQL (Number of licenses per concurrent user: 0 (thereof 0 are available))
⊳ -5	Elite (Number of licenses per concurrent user: 3 (thereof 2 are available), Activation (done))
	\delta Lite (Number of licenses per Computer: 0 (thereof 0 are available))
	Elements (Number of licenses per Computer: 0 (thereof 0 are available))
	One off Elite (Number of licenses per concurrent user: 0 (thereof 0 are available)) ystem

License Viewer screen

Serial Number Confirmation

To obtain your PATGuard 3 serial number: (Note; the format should be something like **xxF6x-xxxxx-0Alax-xxxxx-xxxxx-xxxxx**).

This would be either on the card you were issued with or the email confirmation.

However, this can be found on the login page by selecting "Licence Viewer" (PATGuard 3 version 3.3.2 onwards) then expand all tick boxes under "Modules", "PATGuard 3" and your serial number will be displayed

Or

From within the software, select "Help" and "About PATGuard" the version can be seen in this window. Also on this screen, select "Licence" and then expand all tick boxes under "Modules", "PATGuard 3" and your serial number will be displayed

How many PCs can the licence be used on?

Each licence is for one <u>standalone PC</u> or <u>network Server</u> only. If used on a network Server the user will have a 'floating' licence that can be used on any PC on the network that has followed the instructions on the <u>Installing on a network Workstation</u> page.

Install examples for PATGuard 3 - Installation / licensing help

1, Standalone PC Install (requires one licence)

One licence can be purchased and then installed / activated on a single PC. This allows one copy of the software to operate on one PC, using one database at a time.

2, Standalone PC Installs (requires two or more licences – same for multiple standalone PCs)

One full licence plus additional PC licences can be purchased and then installed / activated on each individual PC. This allows each PC to use one copy of the software to operate, using one database each.

3, Network Install – option #1 (requires one licence)

Customer can purchase one licence and then install this version on a network server, after successfully installing on a server the customer can run / install the "Netsetup.exe" file on each "Workstation". This allows one copy of the software to operate at any one time, on one Workstation using one database.

4, Network Install – option #2 (requires one licence and additional network licences)

Customer can purchase one licence and then install this version on a network server, after successfully installing on a server the customer can apply additional licence keys (additional licences) and then run / install the "Netsetup.exe" file on each "Workstation". This allows more than one copy of the software to operate at any one time on multiple Workstations as directed by the number of additional licences, however, only one database can be accessed at any one time (however, multiple databases can be accessed).

How do I transfer the licence?

To transfer your licence to a different PC, select **Deactivate Licence from this PC...** at the Login screen.

Login	×					
PATGUARD						
Licence Activate New Serial Number Apply Renewal Key Deactivate Licence from this PC Licence Viewer	Username: Admin Password: Hint: No password set - leave blank					
Licence Viewer OK Cancel						

Login screen

Following the on-screen instructions, PATGuard 3 will contact the Activation Service to deactivate your licence. Click **End** when complete.



Online Deactivation

To reactivate on the same PC, select **Reactivate Existing Serial Number** on the login screen and follow the on-screen instructions.

Login		×		
PAT GI		٨D		
Licence Activate New Serial Number Apply Renewal Key	Username: Password:	Admin		
Reactivate Existing Serial Number Licence Viewer	Hint: No pas	sword set - leave blank		
Seaward website				

Login screen after deactivation

How do I extend my licence?

During the last 30 days of your licence you will be shown the number of days remaining when you start PATGuard 3 and be given a link to follow to renew your licence. After expiry you will be reminded that the licence has expired - note you will not be able to purchase a renewal key after your licence has expired, please see What happens when my licence expires.

Note: renewal keys are in the following format: __C6_-44K_ _-0ADa _-5W36S-_P4SN-7_5z_

When you have purchased a new Activation Key, select Apply Renewal Key on the login screen.

Login BATGU Licence Activate New Serial Number Apply Renewal Key	JARD Username: Admin Password:
Deactivate Licence from this PC Licence Viewer	Hint: No password set - leave blank
Seaward we	ebsite

Login Screen

Enter your Activation Key on the following screen and select OK.

Enter Activation Key					
Activation Key					
	<u>O</u> K	<u>C</u> ancel			

Activation Key Entry

How do I buy an additional licence?

Additional Licences are only available to customers that already have a valid (not expired) licence. Customers should contact their Distributor or Seaward directly for more information.
What happens when my licence expires?

PATGuard 3 will become read-only until the licence is renewed. You will have view-only access to all data but will not be able to use any of the PATGuard 3 features.

Once your software licence has expired the only way to continue using it is to purchase a new serial number / licence. In order to use this new serial number you will first need to deactivate your old licence and then perform a new activation.

Deactivate your expired licence

Open up PATGuard 3 on your PC and in the login screen select 'Deactivate Licence from this PC...'.

Login FATGL		
Activate New Serial Number	Username: Admin	
Apply Renewal Key.	Password:	
Deactivate Licence from this PC	Hint: No password set - leave blank	
Licence Viewer	OK Cancel	
Seaward website		

Login screen

Select 'Deactivate now'.



Deactivation screen

You will require an internet connection to complete the deactivation. Click 'Next' to continue the process.



Deactivation screen

Once you have successfully deactivated the licence you will see the below message. Click 'End' to complete the process.



Deactivation screen

Activate your new serial number

You will now be taken back to the PATGuard 3 login screen. In this screen select 'Activate New Serial Number'.

Login X			
Activate New Serial Number	Username: Admin		
Apply Renewal Key	Password:		
Reactivate Existing Serial Number	Hint: No password set - leave blank		
Licence Viewer	OK Cancel		
Seaward website			

Login screen

You will be advised that a valid serial number is required to complete the action. If you have already purchased a new serial number from your distributor or online or are wishing to purchase your new serial number online then press OK. If you are yet to purchase a new serial number from your distributor then you will require this before you go any further. Press cancel, purchase your serial number and then repeat this process.



Activation warning message

With a valid serial number, select 'I have a Serial Number and I want to activate PATGuard 3' and follow through the <u>activation process</u>.



Reactivation selection screen

Licence Renewal

3 Licence Renewal

Renewing on a PC with internet access

Renewal keys are in the following format: ___C6_-44K___-0ADa _-5W36S-_P4SN-7_5z_ if the key you have is not in this format then this may not be a renewal key and should not be used here - contact <u>Seaward Support</u> for help if you are not sure.

To renew on a PC with internet access, select Apply Renewal Key Renew on the login screen.

Login EACTION FOR THE SECOND	JARD	
Activate New Serial Number	Username: Admin	
Apply Renewal Key	Password:	
Deactivate Licence from this PC	Hint: No password set - leave blank	
Licence Viewer	OK Cancel	
Seaward website		

Login Screen

Enter your renewal key in the following screen and select OK:

Enter	Activation Key			
Acti	vation Key	l		
			<u>O</u> K	Cancel
	_			

Enter Activation Key

Select	Activate	now
--------	----------	-----

Web Activation			
\bigcap	The Activation Key has to be validated online.		
	Please provide a connection to the Internet and activate it.		
		Proxy settings	
	Activate now	Cancel	

Activation window

PATGuard 3 will contact the Activation Service to verify your Activation Key:



Activation in progress

You will receive confirmation that Activation has completed successfully:



Activation Successful

The activation process will then take you through a process to backup your licence



Activation window

Finally, you will receive confirmation that Activation has completed successfully:

PATGuard3	<u> </u>
Licence key successfully applied	d.
Ок	

Activation Successful

Renewing on a PC without internet access

To renew on a PC without internet access, please contact Seaward Support.

General FAQs



Merging Databases Short Code Transfer Error while printing – (11) Asset Naming Changing Company Logos Licence Utility Certificate of Testing / Visual Only Tests Regarding Names used on the Apollo and downloading to PATGuard 3

Merging Databases

Before attempting the sequence below we recommend that you back-up all databases and also make sure you are using the latest version of PATGuard 3.

PATGuard 3 Elite has the ability to save a copy of a section of the database as a Briefcase file for other PATGuard database programs to open. PATGuard Elite can also send these files direct to an email program running on your PC.

Creating a pat file

Select a Client, Site or Location. The item selected and all lower level items will be copied. Choose Data Transfer and to File. Selecting File will cause a Save As... dialog box to be displayed. Select the path and File name where the file is to be saved. Briefcase files have a File Type of *.pat. Select Save to create the file.

Opening a pat file

From the File drop down box select Open... Select the path of the file you wish to open. Select the correct File of type. For Briefcase files this will be *.pat. Select the appropriate file. Then select Open. As the data is processed messages may appear if there is a conflict between existing data and the new data.

Note; this whole process must be done on exactly the same version of PATGuard 3.

Short Code Transfer

The short codes are not held in the database but in a dat file that stays with the programme. To use your existing PATGuard 2 short codes, please see the following:

This procedure is to transfer the short codes from an install of PATGuard 2 to PATGuard 3. Note this procedure will delete any company information or short codes that have been already been setup in PATGuard 3.

Ensure you have a copy of PATGuard 3 installed and working.

Make sure both PATGuard 2 and PATGuard 3 are closed.

If you performed a Network install for PATGuard 3 (this involves selecting the Network installation option during installation) then the file will be in the install folder you selected. If not, open Windows Explorer and continue below.

To open Windows Explorer, click Start, point to All Programs, point to Accessories, and then click Windows Explorer.

Windows 8 / 10

First you will need to show hidden files/folders. In Windows Explorer select "View" then select the "Hidden items" checkbox.

If PATGuard 3 was installed to the default location then the file will be in: C:\ProgramData \Seaward\PATGuard 3\appData

Windows 7

First you will need to show hidden files/folders. In Windows Explorer select "Organize" then select "Folder and search options". Select the View tab then in the Advanced Settings section select the "Show hidden files, folders, and drives" circular radio button option. Select Apply then OK.

If PATGuard 3 was installed to the default location then the file will be in: C:\ProgramData \Seaward\PATGuard 3\appData

Windows XP

If PATGuard 3 was installed to the default location then the file will be in: Documents and Settings\All Users\Application Data\Seaward\PATGuard 3\appData

As a backup, in the above directory, rename the PATGuard3.dat (for example to _PATGuard3.dat or something similar).

Navigate to the PATGuard 2 install directory, the default being: C:\Program Files\Seaward\PATGuard 2

Make a copy of the PATGuard.dat file and paste this file in to the following folder C:\ProgramData \Seaward\PATGuard 3\appData

In the above folder (C:\ProgramData\Seaward\PATGuard 3\appData) rename the PATGuard.dat to PATGuard3.dat

Reopen PATGuard 3 and the short codes should be in "File", "Setup" under the "PAT Options" tab

Error while printing – (11)

This is generally caused by the user not having a default printer set up on their PC. You need to set up a printer in the Control Panel – if you have an IT department they could do this for you.

Note, you do not need to have the printer connected to the pc, but the programme requires a have a default printer on the system.

Asset Naming

In general, assets are sorted by site location and then alphabetically or numerically depending upon how assets are identified - this method will sort by numbers first and then letters.

To print an asset register only in numerical order you will need to make sure your asset naming culture (identification) will allow this. For example; the asset numerical name should be the same to allow them to sort; 0001, 0002..... 0010 etc.

Changing Company Logos

To change the Company Logo on PATGuard 3 select "Setup" and in the "Company Details" section "Browse" for your new logo.

Note; the .jpg file for a new Company Logo needs to be;

Approx. 399 x 77 pixels and approx. 15kB in size (note we recommend trying to keep the image down to about 15k as if the logo is larger than this it will reduce the maximum number of pages that a report can be composed of).

Licence Utility

We have developed a file **LIcUtility.exe** as a tool that can be used if you have an issue with network installs and the software locking due to too many users.

The utility can be downloaded from http://www.seaward.co.uk/userfiles/LIC-Utility.zip

To run it you need to launch it from a machine where PATGuard is installed (either netsetup or standalone install, shouldn't matter as long as LicProtector313.dll has been registered with the operating system).

A LicUtility		— X —
C:\ProgramData\Seaward\PATGua	rd 3\appData\patguard3.lic	
christophert+++SELPC149		K
Refresh	Deactivate	Close
	1.1 1.11.11.1	

License Utility

Use the file selector button on the top right of the dialog to point at the **PATGuard3.lic** file on the server. At this point a list of connected users should be shown in the format "User+++Hostname". Selecting one of

these entries in the list and clicking deactivate will remove their entry from the licence file. There is no way of telling if the user is currently active or just a phantom connection left because their connection didn't close cleanly. If the user is currently active then their entry may well reappear within a minute or so if refresh is clicked.

Certificate of Testing / Visual Only Tests

Regarding the Certificate of Testing report and the "Valid Until" date:

The "Valid Until" date in the Certificate of Testing is taken from the data selected in the filter window, for example when filtering by "Client Name:", "Site Name:" or "Location Name:"

An issue can occur with the "Valid Until" date if you if you are performing "Visual" only tests or using the "Custom Inspection Form" on the Apollo 600.

If this is the case, you may need to change the status of the "Test Period". Note to check if this may need to altered see if there is an entry against the "Next Full Test Date" column of the data in PATGuard 3 (large right hand window column – if required you can select this by right mouse clicking on then column headers.

1, Double click on an asset in the right hand window (of PATGuard 3) to open the "Asset Details" window

2, In the "Full Test" section the "Test Period" may be displayed as "User Defined" this will need to be changed to "No Re-Test".

3, The above process will need to be performed with all assets that have "Visual" only data.

Regarding Names used on the Apollo and downloading to PATGuard 3

Regarding names used on the Apollo Series and downloading to PATGuard 3:

In certain circumstances PATGuard 3 will not accept file / Site / Location names that contain Windows reserved names (for example, CON, PRN, AUX, NUL, COM... and LPT...), for more information see the following:

https://msdn.microsoft.com/en-gb/library/windows/desktop/aa365247%28v=vs.85%29.aspx

Licence Agreement

3 Licence Agreement

The licence agreement for PATGuard 3 can also be viewed from the About Screen.

Licence Agreement

Seaward Electronic Limited

Software Licence

IMPORTANT NOTICE - PLEASE READ THESE TERMS CAREFULLY BEFORE INSTALLING THE

SOFTWARE.

This licence agreement (Licence) is a legal agreement between you (you or your) and Seaward Electronic

Limited of 18 Bracken Hill, South West Industrial Estate, Peterlee, County Durham, SR8 2SW with company number 01674384 (**us**, **we** or **our**) for:

- PATGuard 3 computer software (**Software**); and
- related materials and documentation (**Documentation**).

We licence use of the Software and Documentation to you on the basis of this Licence. We do not sell the Software or Documentation to you. We remain the owners of the Software and Documentation at all times. This Licence applies to any trial use of the Software and Documentation, and any subsequent purchase of the Software and Documentation.

Important notice to all users

- By trialling, downloading, installing, ordering and using the Software through our website at www.seaward.co.uk (Website) you agree to the terms of this Licence which will bind you (and your employees where relevant). The terms of this Licence include, in particular, limitations on liability in condition 7.
- If you do not agree to the terms of this Licence, we will not license the Software and Documentation to you and you will not be able to continue with the download and installation process.
- 3. Please note that the Seaward Returns Policy does not apply to the purchase of Software and Documentation. You have the right to cancel your transaction without charge and without reason <u>before</u> confirming your purchase of the Software or Documentation. However, you will lose your right to cancel your transaction once you accept this Licence as part of the purchase process. This will not affect any consumer rights in respect of defective downloaded Software or Documentation purchased through our Website.

You should print a copy of these Licence arrangements for future reference.

1. Supply of the Software

- 1.1 For the steps you need to take to arrange a trial and to place an order for the Software and Documentation through our Website, please visit www.seaward.co.uk/patguard3.
- Our order process allows you to check and amend any errors before submitting your order to us.
 Please take the time to read and check your order at each page of the order process.
- 1.3 After you place an order, you will receive an email from us acknowledging that we have received and accepted your order.
- 1.4 Our email will also confirm the details of the Software and contain a link from which the Software

and Documentation can be downloaded or provide an authorisation code following your trial of the Software (**Order Confirmation**). The Contract between us will only be formed when we send you the Order Confirmation.

2. Grant and Scope of Licence

2.1 In consideration of the payment of the licence fee for the Software and Documentation (**Fee**), we hereby grant to you a non-exclusive, non-transferable licence to download and use the Software and the Documentation on the terms of this Licence only for the duration set out in the Order Confirmation.

2.2 You may:

- 2.2.1 install and use the Software for your personal purposes (if you are a consumer) or your internal business purposes (if you are a business) only on one computer;
- 2.2.2 provided it is used on only one computer at any one time, transfer the Software from one computer to another by following the procedure on our Website;
- 2.2.3 provided you comply with the provisions in condition 3.1, make one (1) copy of the Software for back-up purposes;
- 2.2.4 receive and use any free supplementary software code or update of the Software incorporating "patches" and corrections of errors as may be provided by us from time to time;
- 2.2.5 use any Documentation in support of the use permitted under condition 2.2 and make one(1) copy of the Documentation as reasonably necessary for its lawful use.
- 2.3 The Software requires the following minimum system requirements for its operation:
 - 2.3.1 1 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor;
 - 2.3.2 1 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit);
 - 2.3.3 16 GB available hard disk space (32-bit) or 20 GB (64-bit);
 - 2.3.4 DirectX 9 graphics device with WDDM 1.0 or higher driver;
 - 2.3.5 .Net 4.0.
- 2.4 You acknowledge and agree that where your systems utilise Microsoft software, the Software can only be supported by us where such Microsoft software and systems continue to be supported by Microsoft.

3. Restrictions

- 3.1 Except as expressly set out in this Licence or as permitted by any local law, you undertake:
 - 3.1.1 not to copy the Software or Documentation except where such copying is incidental to normal use of the Software or where it is necessary for the purpose of back-up or operational security;
 - 3.1.2 not to sell, rent, lease, sub-license, loan, translate, merge, adapt, vary or modify the Software or Documentation;
 - 3.1.3 not to make alterations to, or modifications of, the whole or any part of the Software nor permit the Software or any part of it to be combined with, or become incorporated in, any other programs;
 - 3.1.4 not to disassemble, de-compile, reverse engineer or create derivative works based on the whole or any part of the Software nor attempt to do any such things except to the extent that (by virtue of section 296A of the Copyright, Designs and Patents Act 1988) such actions cannot be prohibited because they are essential for the purpose of achieving inter-operability of the Software with another software program, and provided that the information obtained by you during such activities:
 - 3.1.4.1 is used only for the purpose of achieving inter-operability of the Software with another software program;
 - 3.1.4.2 is not disclosed or communicated without our prior written consent to any third party to whom it is not necessary to disclose or communicate it; and
 - 3.1.4.3 is not used to create any software which is substantially similar to the Software;
 - 3.1.5 to keep all copies of the Software secure and to maintain accurate and up-to-date records of the number and locations of all copies of the Software;
 - 3.1.6 to supervise and control use of the Software and ensure that the Software is used by your employees and representatives (where appropriate) in accordance with the terms of this Licence;
 - 3.1.7 to include our copyright notice on all entire and partial copies of the Software in any form; and
 - 3.1.8 not to provide, or otherwise make available, the Software in any form, in whole or in part

(including, but not limited to, program listings, object and source program listings, object code and source code) to any person other than your employees without prior written consent from us.

4. How to Pay

- 4.1 The Fee for the Software and Documentation shall be as set out on our Website from time to time.
- 4.2 You shall pay to us the Fee as set out in the Order Confirmation, in advance, by PayPal or by debit and credit card. We accept the following cards: Visa, Visa Credit, Visa Debit, Purchasing Card and MasterCard.
- 4.3 All sums payable under this Licence are exclusive of VAT or any other relevant local sales taxes, for which you shall be responsible.
- 4.4 If you fail to pay any amount payable to us under this Licence, we may charge you interest on the overdue amount (payable immediately on demand) from the due date for payment up to the date of actual payment at the rate of 4% per annum above the base rate for the time being of the Bank of England. Such interest shall accrue on a daily basis and shall be compounded quarterly. As an alternative, and at our sole discretion, we may also claim interest under the Late Payment of Commercial Debts (Interest) Act 1998.

5. Intellectual Property Rights

- 5.1 You acknowledge that all intellectual property rights in the Software and the Documentation throughout the world belong to us (or our licensors), that rights in the Software are licensed (not sold) to you, and that you have no rights in, or to, the Software or the Documentation other than the right to use them in accordance with the terms of this Licence.
- 5.2 You acknowledge that you have no right to have access to the Software in source code form or in unlocked coding or with comments.

6. Limited Warranty

- 6.1 We warrant that:
 - 6.1.1 the Software will, when properly used and on an operating system for which it was designed, perform substantially in accordance with the functions described in the Documentation; and
 - 6.1.2 that the Documentation correctly describes the operation of the Software in all material respects

for a period of 90 days from the date of purchase of the Software and confirmation of acceptance of this Licence (**Warranty Period**).

- 6.2 If, within the Warranty Period, you notify us in writing of any defect or fault in the Software as a result of which it fails to perform substantially in accordance with the Documentation, we will, at our sole option, either repair or replace the Software.
- 6.3 The warranty does not apply:
 - 6.3.1 if the defect or fault in the Software results from you having amended the Software;
 - 6.3.2 if the defect or fault in the Software results from you having used the Software in contravention of the terms of this Licence;
 - 6.3.3 if the defect or fault in the Software results from damage to the Software or your computer caused after you have downloaded the Software;
 - 6.3.4 if the defect or fault in the Software results from installation on a system that is no longer supported by Microsoft; or
 - 6.3.5 during any trial of the Software prior to purchase.
- 6.4 The Software may be used in conjunction with hardware supplied by third parties. Please refer to the manufacturer's guarantee (where relevant) for details.
- 6.5 If you are a consumer, this warranty is in addition to your legal rights in relation to Software that is faulty or not as described. Advice about your legal rights is available from your local Citizens' Advice Bureau or Trading Standards office.

7. Limitation of Liability

- 7.1 You acknowledge that the Software has not been developed to meet your individual requirements, and that it is therefore your responsibility to ensure that the facilities and functions of the Software as described in the Documentation meet your requirements.
- 7.2 If you are a business customer, we only supply the Software and Documentation for internal use by your business, and you agree not to use the Software or Documentation for any re-sale purposes.
- 7.3 We shall not under any circumstances whatever be liable to you, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, arising under or in connection with the Licence for:
 - 7.3.1 loss of profits, sales, business, or revenue;
 - 7.3.2 business interruption;

- 7.3.3 loss of anticipated savings;
- 7.3.4 loss or corruption of data or information;
- 7.3.5 loss of business opportunity, goodwill or reputation; or
- 7.3.6 any indirect or consequential loss or damage.
- 7.4 Other than the losses set out in condition 7.3 (for which we are not liable), our maximum aggregate liability under or in connection with this Licence whether in contract, tort (including negligence) or otherwise, shall in all circumstances be limited to a sum equal to 100% of the Licence Fee. This maximum cap does not apply to condition 7.5.
- 7.5 Nothing in this Licence shall limit or exclude our liability for:
 - 7.5.1 death or personal injury resulting from our negligence;
 - 7.5.2 fraud or fraudulent misrepresentation;
 - 7.5.3 any other liability that cannot be excluded or limited by English law.
- 7.6 This Licence sets out the full extent of our obligations and liabilities in respect of the supply of the Software and Documentation. Except as expressly stated in this Licence, there are no conditions, warranties, representations or other terms, express or implied, that are binding on us. Any condition, warranty, representation or other term concerning the supply of the Software and Documentation which might otherwise be implied into, or incorporated in, this Licence whether by statute, common law or otherwise, is excluded to the fullest extent permitted by law.
- 7.7 If you are a consumer, we are only responsible for loss or damage you suffer that is a foreseeable result of our breach of this Licence or our negligence up to the amount specified in condition 7.4, but we are not responsible for any loss or damage that is not foreseeable. Loss or damage is foreseeable if they were an obvious consequence of our breach or if they were contemplated by you and us at the time we granted you the Licence.

8. Duration and Termination

- 8.1 Unless terminated earlier in accordance with this condition 9, the Licence shall continue for the duration set out in the Order Confirmation, when it shall automatically terminate.
- 8.2 We may terminate this Licence immediately by written notice to you if you commit a material or persistent breach of this Licence which you fail to remedy (if remediable) within 14 days after the service of written notice requiring you to do so.
- 8.3 We may terminate this Licence where the Software has been installed on a system operating

Microsoft software, and that Microsoft software is no longer supported by Microsoft.

- 8.4 Upon termination for any reason:
 - 8.4.1 all rights granted to you under this Licence shall cease;
 - 8.4.2 you must immediately cease all activities authorised by this Licence;
 - 8.4.3 you must immediately pay to us any sums due to us under this Licence; and
 - 8.4.4 you must immediately delete or remove the Software from all computer equipment in your possession and immediately destroy or return to us (at our option) all copies of the Software then in your possession, custody or control and, in the case of destruction, certify to us that you have done so.

9. **Communications Between Us**

- 9.1 If you are a consumer, if you wish to contact us in writing, or if any condition in this Licence requires you to give us notice in writing, you can send this to us by e-mail or by pre-paid post to Seaward Electronic Limited at <u>software@seaward.co.uk</u>. We will confirm receipt of this by contacting you in writing, normally by e-mail.
- 9.2 If we have to contact you or give you notice in writing, we will do so by e-mail or by pre-paid post to the address you provide to us in your order for the Software.
- 9.3 If you are a business customer, please note that any notice given by you to us, or by us to you, will be deemed received and properly served immediately when posted on our website, 24 hours after an e-mail is sent, or three days after the date of posting of any letter. In proving the service of any notice, it will be sufficient to prove, in the case of a letter, that such letter was properly addressed, stamped and placed in the post and, in the case of an e-mail, that such e-mail was sent to the specified e-mail address of the addressee.

10. Events Outside Our Control

- 10.1 We will not be liable or responsible for any failure to perform, or delay in performance of, any of our obligations under this Licence that is caused by an Event Outside Our Control. An Event Outside Our Control is defined below in clause 10.2.
- 10.2 An **Event Outside Our Control** means any act or event beyond our reasonable control, including without limitation failure of public or private telecommunications networks.
- 10.3 If an Event Outside Our Control takes place that affects the performance of our obligations under this Licence:

- 10.3.1 our obligations under this Licence will be suspended and the time for performance of our obligations will be extended for the duration of the Event Outside Our Control; and
- 10.3.2 we will use our reasonable endeavours to find a solution by which our obligations under this Licence may be performed despite the Event Outside Our Control.

11. Other Important Terms

- 11.1 We may transfer our rights and obligations under this Licence to another organisation, but this will not affect your rights or our obligations under this Licence.
- 11.2 You may only transfer your rights or your obligations under this Licence to another person if we agree in writing.
- 11.3 If you are a business customer, this Licence and any document expressly referred to in it constitutes the entire agreement between you and us. You acknowledge that you have not relied on any statement, promise or representation made or given by or on behalf of us which is not set out in this Licence or any document expressly referred to in it.
- 11.4 If we fail to insist that you perform any of your obligations under this Licence, or if we do not enforce our rights against you, or if we delay in doing so, that will not mean that we have waived our rights against you and will not mean that you do not have to comply with those obligations. If we do waive a default by you, we will only do so in writing, and that will not mean that we will automatically waive any later default by you.
- 11.5 Each of the conditions of this Licence operates separately. If any court or competent authority decides that any of them are unlawful or unenforceable, the remaining conditions will remain in full force and effect.
- 11.6 If you are a consumer, please note that this Licence, its subject matter and its formation, are governed by English law. You and we both agree to that the courts of England and Wales will have non-exclusive jurisdiction. However, if you are a resident of Northern Ireland you may also bring proceedings in Northern Ireland, and if you are resident of Scotland, you may also bring proceedings in Scotland.
- 11.7 If you are a business customer, this Licence, its subject matter and its formation (and any noncontractual disputes or claims) are governed by English law. We both agree to the exclusive jurisdiction of the courts of England and Wales.