



# **PATGuard Pro**

# **User Manual**

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# PATGuard Pro

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## **Introduction**

Welcome to PATGuard Pro, Seaward's professional software program for safety record keeping. PATGuard Pro with its full test history and record updating features is one of the most advanced programs of its type.

Easy upgrade options and record sharing with other PATGuard users is achieved through PATGuard database compatibility across the range. While versatility is provided through the capability of processing data download from most portable appliance testers currently available.

With easy to use and automated features associated with the acclaimed PATGuard style, PATGuard Pro is for users who require a truly professional PAT record system.

## Installing PATGuard Pro

### *Note*

*Before installing PATGuard Pro ensure no other application programs are running.*

Installing PATGuard Pro is easy, simply insert the CD into your CD driver. The program should automatically commence the installation.

If the CD does not automatically start up, then use Windows Explorer or other file management applications to select your CD drive, double click with the mouse on the setup.exe file to start the installation.

Follow the on-screen instructions. You will be given an option to either install to a **Standalone PC** or for a **Network** installation.

### **Standalone PC installation**

Select **Next** and follow the on-screen instructions. When starting PATGuard Pro, complete the installation by selecting **Register** at the Login screen and enter the **Serial Number** and **Unlock Code** from inside the CD ROM case. You can register at any time within 30 days of installing the program. After 30 days registration, is required to enter the program.

### **Network Installation**

1. At the prompt for a path for the installation select a directory on a shared network drive that all users have full access.

### *Note*

*Workstations must have write access to the network directory. For Windows 2000 it is important that Restricted Users have write access to the network installed directory. Installation for Windows 2000 must be carried out by an Administrator user with unrestricted access to the network installed directory.*

2. At each workstation run netsetup.exe from the network drive directory. Ensure that it installs to a local drive on the workstation (default path).
3. The standard program will allow single access from any installed workstation.

Each workstation will need to be registered to free the 30 day time limit. When starting PATGuard Pro, at each workstation complete the installation by selecting **Register** at the Login screen and enter the **Serial Number** and **Unlock Code** from inside the CD ROM case. You can register at any time within 30 days of installing the program. After 30 days registration, is required to enter the program.

### **Additional Licenses**

Additional licenses are available from Seaward. These will either allow more than one user access to the program across a computer network or will allow more than one copy of the program to be installed.

For a computer network, an additional license contains a new unlock code. The registration will need to be changed at each workstation. This will allow simultaneous access to the program by however many licenses the registration allows.

### *Note*

*This is not simultaneous access to a database file.*

On first starting the program, login with a **Username** of Admin, no Password is set so leave the **Password** blank.



## Help

The program has an on-line Help facility. Select **Help Topics** from the Help drop down to get help while using the program.

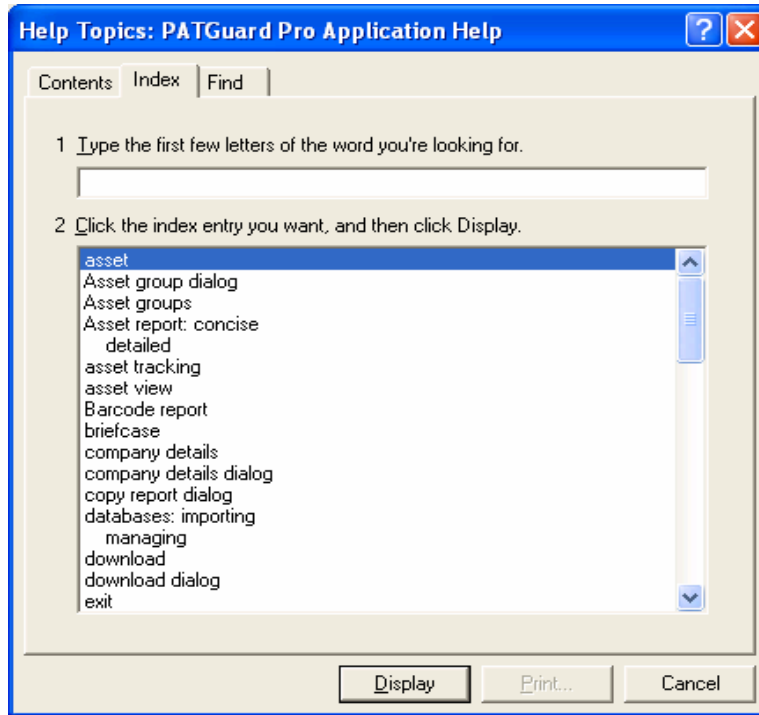


Figure 1: Help Index window

There are three tabs; **Contents**, **Index** and **Find**.

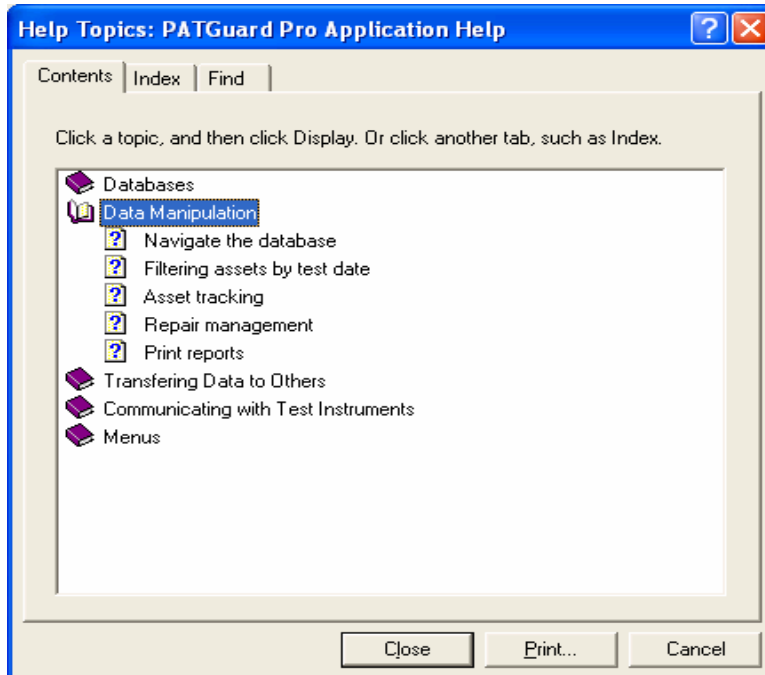
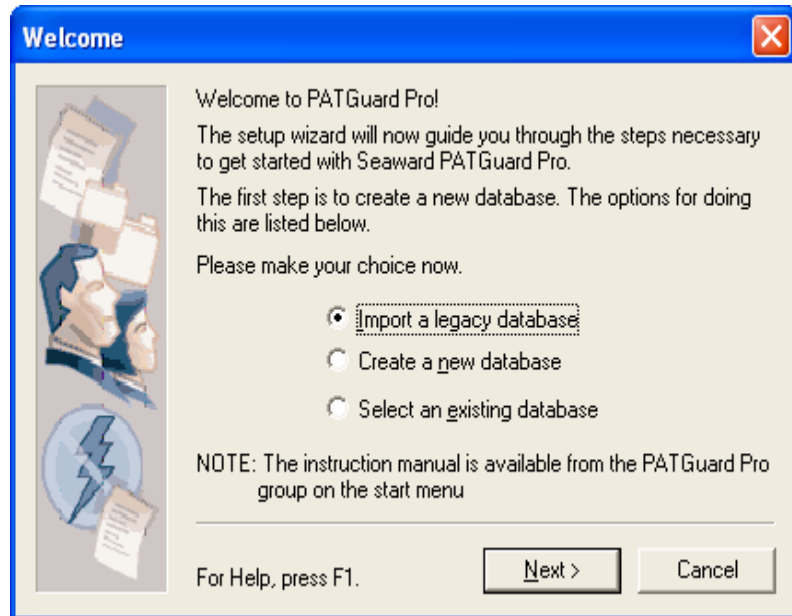


Figure 2: Help Contents window

- **Index** enables you to look for a specific topic, either from the list or by typing into the **Find** field to search for a topic.
- **Contents** enables you to view the Help like a book. The program is covered by a number of books. To open up a book to deal with that section of the program, double click the book with the mouse. Select the chapter in the book you are interested in.
- Selecting the **Find** tab will start the Find Wizard. The wizard will guide you to find the information you seek. Simply follow the on screen instructions

## The Setup Wizard



**Figure 3: Setup Wizard entry window**

The Setup Wizard is designed to help you set up the program. It will guide you through a process to enable you to start using the program immediately.

After the program has been installed, the first time the program is launched (and this will happen immediately on restarting the PC after installation) the Setup Wizard window will appear.

The Setup Wizard is a step by step guide to setting up the program. It will present you automatically with the necessary windows to set the program to run correctly for you. If you are unsure of the different options presented to you, then either use the program **Help** icon to get more information or consult this manual.

Setup Wizard can also be activated at other times from the **Tools** dropdown.

## Importing Legacy Data

The PATGuard Pro program allows data from existing PATS/PATS+, Safety 1st/Safety 1<sup>st</sup>+ and PATSwin databases to be imported into the PATGuard Pro program.

*Note*

*Only PATS/PATS+, Safety 1<sup>st</sup>/Safety1st+ version 5.4 or higher and PATSwin version 2 can be imported.*

However data cannot be imported into an existing PATGuard Pro database, each import will create a new database containing the data from the legacy database.

To Import a database:

1. Select **File**.
2. From the File drop down box select **Import**.
3. Using the Browse window define the path to the directory where the database you wish to import resides. The **OK** button will only become available when a valid database is chosen. Select **OK**.
4. Another window appears for you to enter the new database name for PATGuard Pro.
5. A log will be displayed after the import.
6. PATGuard Pro will now have the new database selected.

Databases are self-contained. Some windows within PATGuard Pro are shared across all databases. These windows are:

Company details

User Accounts

Options

All the above Windows are called from the **Tools** dropdown menu.

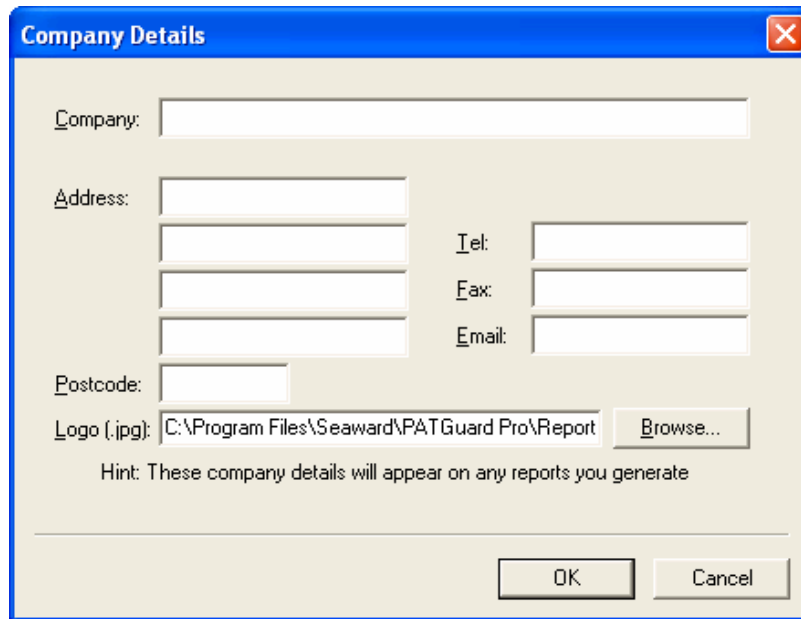
To Delete a database:

1. From the **File** drop down select **Open**.
2. Highlight the database you wish to delete (one mouse click).
3. Press the Delete key on the keyboard.

Only a database that is not currently being used can be deleted.

## Company Details

From the **Tools** menu select Company Details...



Company Details

Company:

Address:

Tel:

Fax:

Email:

Postcode:

Logo (.jpg):

Hint: These company details will appear on any reports you generate

**Figure 4: Company Details data entry form**

Enter the name and address of your company or organisation – these details will be printed on some of the reports produced by the program. The **Logo** field enables a company logo to be selected instead of the Seaward logo. This logo will appear on all Printed Reports.

## User Accounts

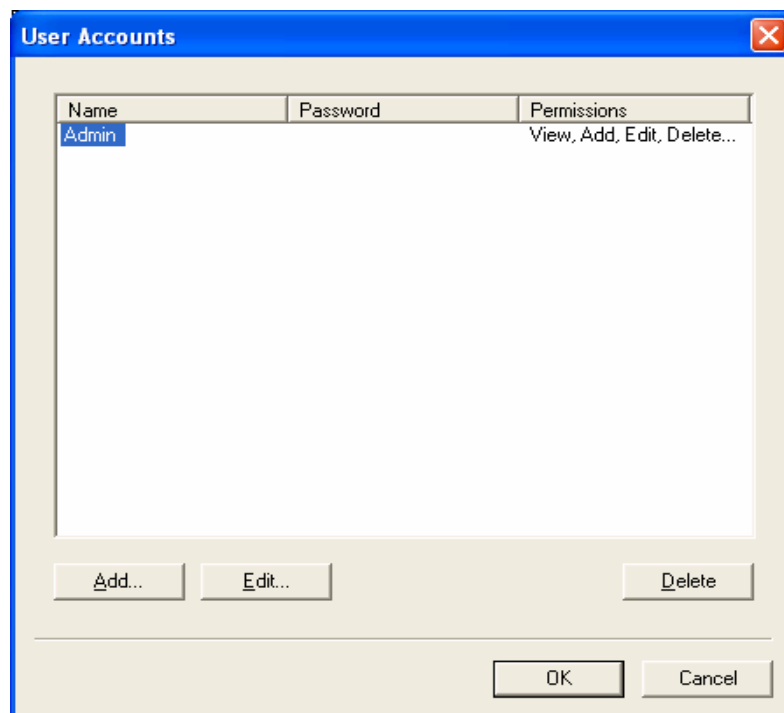


Figure 5: User Accounts window

**User Accounts** enables you to register other users of the program. Each user will have a User **Name** and **Password**. Each User is assigned certain **Permissions**.

Available **Permissions** are (in increasing levels of access):

View  
View, Add  
View, Add, Edit  
View, Add, Edit, Setup  
View, Add, Edit, Delete, Setup

*Note*

*Only users with Permissions allowing Setup will be able to enter the User Accounts screen and amend Usernames, Passwords and Permissions.*

To register another user, select **Add** then simply enter a **Name**, **Password** and select **Permissions** level from the drop down. Then select **OK** to complete the action. There is no limit to the number of users that can be registered.

To remove another user, select the user to be removed with the mouse, select **Delete** and select **OK** to confirm the deletion.

*Note*

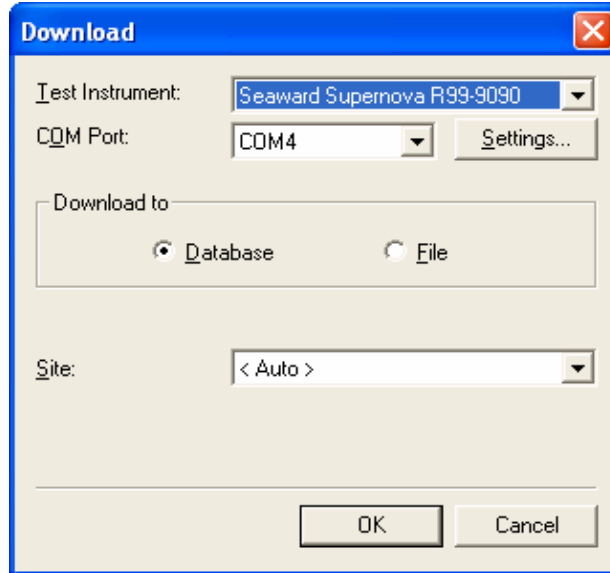
*On first using the program, Username Admin has no Password set. To prevent unauthorised access to the program change the Admin Password.*

*The Username Admin and full Permissions (for Admin) cannot be changed and are fixed within the program.*

## Options

### *PAT Options*

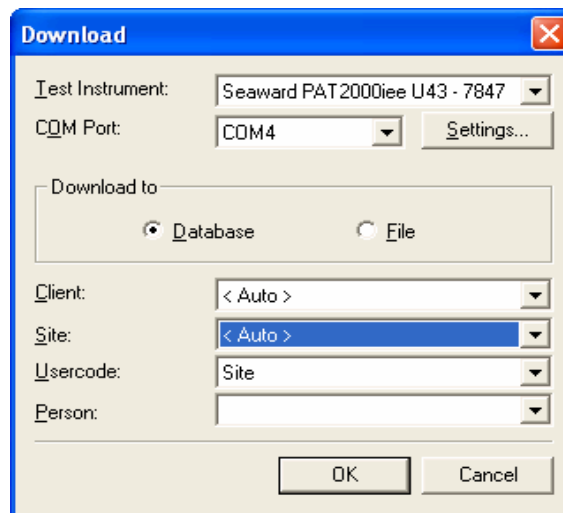
When Test Results are downloaded to PATGuard Pro their routing to the correct Site and Location is dependent upon a number of options within the program.



**Figure 6: Download dialog box**

The **Download** dialog box has an option enabling the Test Results to be sent to an individual Site, (irrespective of any other Option settings) chosen from the **Site** drop down, or Auto. Setting the **Site** to <Auto> will allow Test Results for different Sites to be routed to those Sites automatically. If the Site does not exist, it will be created.

Certain testers with ASCII text output only do not contain sufficient data in the download to fully control the routing of test results. When these testers are selected in the download dialog box two additional fields become available.



**Figure 7: Download dialog box – additional fields**

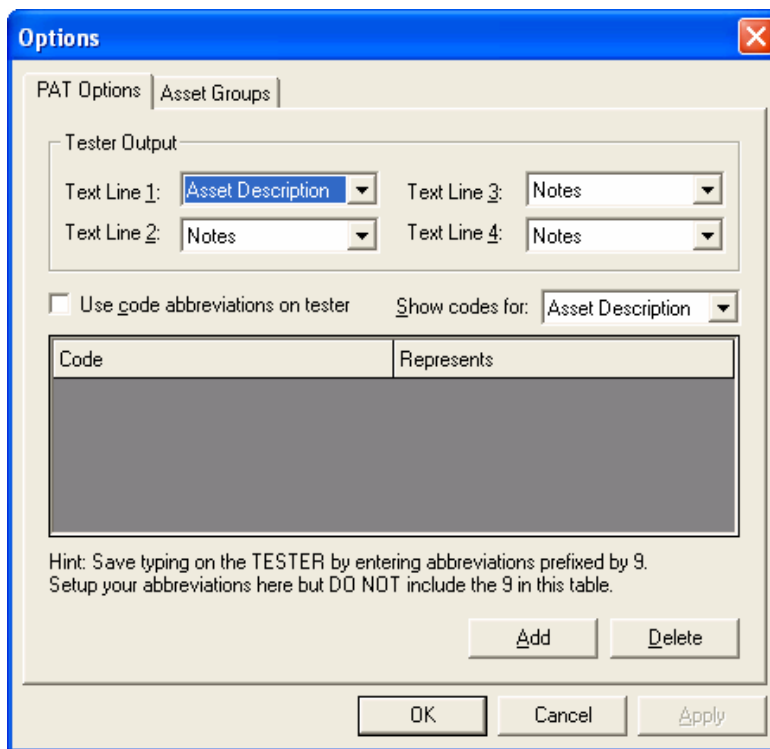
The **Usercode** can be used to route multi-Site test results if set to Site and each test result contains a Site name in the **Usercode** field. Or the **Usercode** can be used to capture additional information, for example the individual personnel who carried out the testing..

Additional routing information or extra data can also be set up in the **PAT Options** window (see below).

Testers with sss output only use the **PAT Options** for additional data as all test routing is contained in the download data.

If the program receives test results that cannot be routed to a known Site then it will create a new Site if the download Test Result contains a Site name if not, an Unassigned Site will be created. Test Results will be routed to any correctly defined Site and will either be captured by existing Assets or will create new Assets. Test results which do not have a defined or incorrectly defined Site, will create Assets at a newly created Site or an Unassigned Site depending on whether a Site name was available. The Unassigned Site can be re-named (see Context Menus) or individual Assets can be moved to other Sites using a drag and drop action (see Drag and Drop Operations).

From the **Tools** drop down select **Options...**



**Figure 8: Options dialog box**

### **Tester Output**

The **PAT Options** tab enables you to use the Text fields on the PAT tester (if available) to capture extra information for the Asset record.

The upper half the screen named **Tester Output** allows you to assign an individual line of a Text field to represent a field in the Asset record. Information typed into these fields on the PAT tester appears in the designated field in the Asset after download.

#### *Note*

*Text Line 1 has a default setting of Asset Description as Asset Description is set as a default in the Supernova Plus, Europa Plus and PrimeTest 300 testers. Only change these Text Line settings if a corresponding change is made to the Comment Designator of these testers (see tester Instruction Manual). If the settings for Tester Output are*



*different to the Comment Designator settings in Supernova Plus and Europa Plus testers , Comment Designator settings will take precedence. For other testers Text Line 1 should be changed as required.*

If a field is set to **Notes** then information entered into the PAT tester will appear in the Test Result notepad.

The **Site** option is used for routing the Test Result to the correct Site. The program will create new Sites if the Site specified does not exist in the database. This setting will be ignored for SSS format data.

The **Location** can be used to route the Test Result to a Location within a Site. If the Location does not exist at the specified Site then the program will create it. This setting will be ignored for SSS format data.

The other options apart from **Asset Group** are used to capture extra information for the **Asset Details**. Whatever is in the Text line will appear in that particular **Asset Details** field that has been defined on this screen.

Once **Asset Details** fields have been populated then they cannot be amended by the download data. Subsequent downloads can populate empty fields.

If the **Asset Group** option is set for a Text Line then the Text Line within the downloaded Test Result must contain a registered **Asset Group** (or a **Short Code** which represents that **Asset Group**, see Short Codes).

To Summarise:

**Asset Group** are used to reference an **Asset Group** within the database.

**Site** and **Location** can be used to reference existing Sites and Locations or create new Sites and Locations. Non SSS format data only.

All other **Options** (**Asset Description, Person, Make, Model, Serial Number, Repair**) fill out the appropriate field in the **Asset Details** or **Test Details** window as appropriate. **Person** will be ignored for SSS format data and will override any **Person** setting in the **Download** dialog box.

No **Options** setting (other than **Asset Group** and **Location**) will cause any field in an existing Asset to be overwritten.

### **SSS Format Data**

The Supernova, Europa and PrimeTest 300 tester families have two download formats; SSS and ASCII text.

As the SSS format contains all information, this program will only accept **Download to Database** in the SSS format from these testers. The ASCII text output is for use with non-Seaward programs.

The SSS output contains **Site, Location, User** (Person) and **Testcode** this affects the way **Options** are processed as follows:

Any **Site** and **Location Options** settings will be ignored, as this information is taken direct from the Test Result for SSS format data.

**Make, Model** and **Serial Number** can be processed using **Options**, as these are not contained in any Test Result.

**Asset Group** can be processed using **Options**. If the referenced **Asset Group** does not contain a **Testcode** or the **Asset Group** option was not used, the **Testcode** will be added to a new Asset or update an existing Asset.

**Repair** information will be placed in the **Test Type** column of **Test Details** with a **Status** set to **Repair**.

The **Test Details** screen is not subject to **Options** settings (other than **Repair**) therefore the Testcodes and User information is derived from the SSS output.

### Short Codes

The lower half of the screen is used to save time entering information while PAT testing. It enables a code up to three characters to be set which can represent regularly typed text. There is no limit to the number of codes that can be set.

To enable this action:

1. Check the **Use code abbreviations on tester** check box.
2. Use the **Show codes for** drop down and select the appropriate **Asset Details** field.
3. Select **Add** to enable the code and value fields.
4. Enter a code up to three characters in the **Code** field.
5. Enter the text that the code represents in the **Value** field
6. A third column to enter a **Cost** is provided for **Repair** selection

Other codes for other Asset Details fields can be entered before saving the settings with the **OK** button. When using Short Codes at the tester: prefix the code by 9 so that PATGuard Pro will recognise the value as a **Short Code**.

### Asset Groups

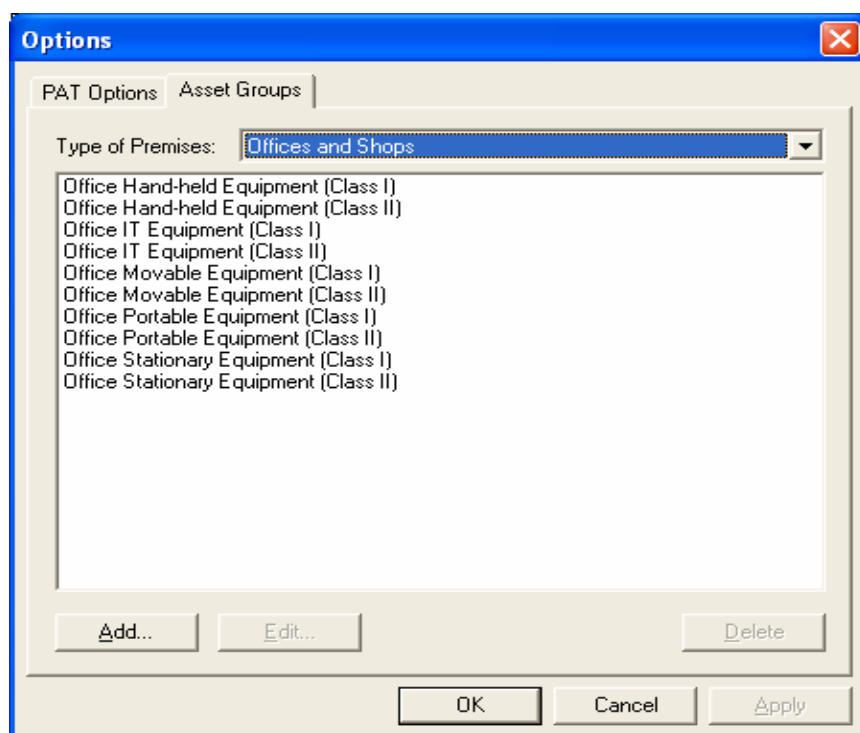


Figure 9: Asset Groups dialog box

Assets can be grouped together where they share a common re-test period and perhaps Testcode.

In the UK, the Health and Safety Executive (HSE) and the Institute of Electrical Engineers (IEE) define re-test periods in their documentation.

These re-test periods are defined in terms of the type of premises 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). These values are preset into the program. The **Edit** and **Add** actions allow you to make changes to these values.

Other Asset groups which are not premise dependent can be added to **Undefined** (e.g. Imported Asset Groups or equivalent from another database will be in **Undefined**).

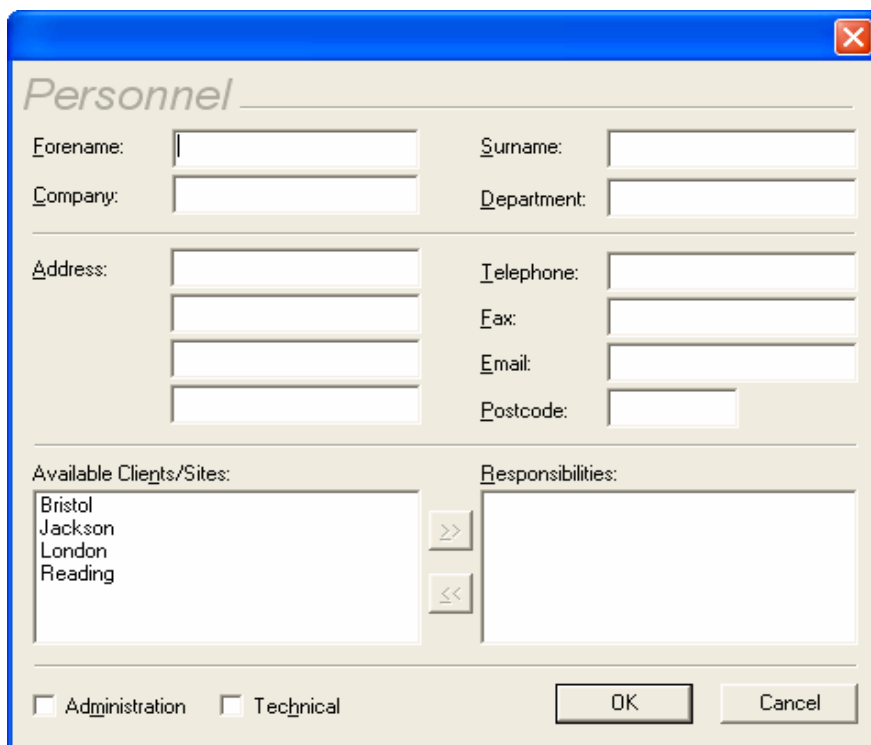
## Personnel

At the bottom of the main screen are three tabs: **Personnel**, **Test Instruments** and **Reports**. Select the **Personnel** tab. Items on this tab are context related. That is they are dependent on the tree selection in the main window. Your own Company Personnel are selected when the database is selected at the top of the tree.

### Note

*Downloads from some types of testers will automatically add Personnel who carried out tests if they are not already known by the program. These are only added to the Personnel tab for the database level at the top of the tree.*

Double clicking on the **Add Personnel** icon will cause the **Personnel** dialog box to open.



The screenshot shows a dialog box titled "Personnel" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Forename: [Text Input]
- Surname: [Text Input]
- Company: [Text Input]
- Department: [Text Input]
- Address: [Text Input]
- Telephone: [Text Input]
- Fax: [Text Input]
- Email: [Text Input]
- Postcode: [Text Input]
- Available Clients/Sites: [List Box containing Bristol, Jackson, London, Reading]
- Responsibilities: [List Box]
- Navigation buttons: >> and <<
- Checkboxes:  Administration,  Technical
- Buttons: OK, Cancel

**Figure 10: Own Personnel data entry form**

Open a new dialog box and enter the details of each person of your own company or organisation you wish to register with the program.

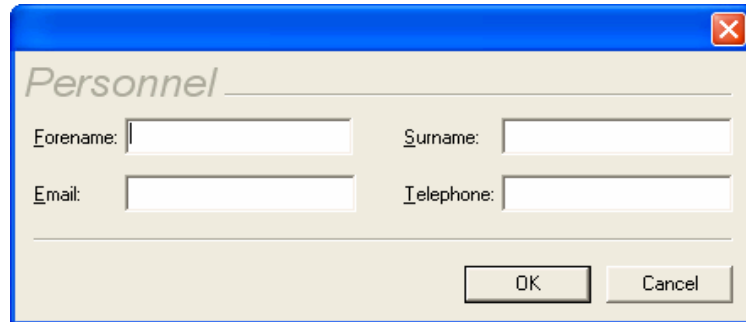
Individual personnel can be assigned different responsibilities for either carrying out PAT testing by checking the **Technical** check box or the Duty Holder responsible for safety at the Site by checking the **Administration** check box.

Individual personnel can have responsibility for individual Sites by selecting from the Available list and using the move button to set the Site into the Responsibility list.

All Icons have a right mouse button action. For Personnel the following actions can be initiated from the right mouse button:

- Add Personnel
- Details
- Delete

Your own company's or your Client's Personnel based at individual Sites or Locations can be entered by selecting the appropriate Site or Location. Double click the **Add Personnel** icon on the **Personnel** Tab to display the **Personnel** dialog box for personnel based at the chosen location.

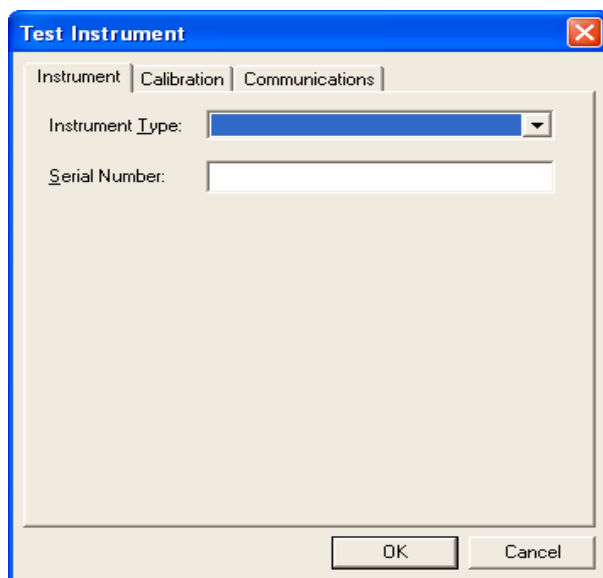
A screenshot of a software dialog box titled "Personnel". The dialog box has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains four text input fields arranged in a 2x2 grid. The top-left field is labeled "Forename:", the top-right "Surname:", the bottom-left "Email:", and the bottom-right "Telephone:". Below the input fields are two buttons: "OK" on the left and "Cancel" on the right.

**Figure 11: Site, Location Personnel data entry form**

Enter all details and select **OK** to save.

## Test Instruments

At the bottom of the main screen are three tabs: **Personnel**, **Test Instruments** and **Reports**. Select the **Test Instrument** tab. Double clicking on the **Add Test Instrument** icon will cause the **Test Instrument** dialog box to open.



**Figure 12: Test Instrument data entry form**

Open a new dialog box and select a Test Instrument from the **Instrument Type** drop down. The tester's **Serial Number** is required to register the tester with the program. Repeat the above for each Test Instrument to be registered with the program.

It is possible to enter a Test Instrument directly into the field rather than select from the drop down. This is so that the program's re-calibration alerts can be used for any Test Instrument. Any user entered Test Instruments will not be available for Download or Upload. Only Test Instruments from the drop down can interact with the program.

### *Note*

*Downloads from some types of testers will register themselves automatically if they are not already registered.*

All Icons have a right mouse button action. For Test Instruments the following actions can be initiated from the right mouse button:

- Add Test Instrument
- Details
- Delete

### The Calibration Tab

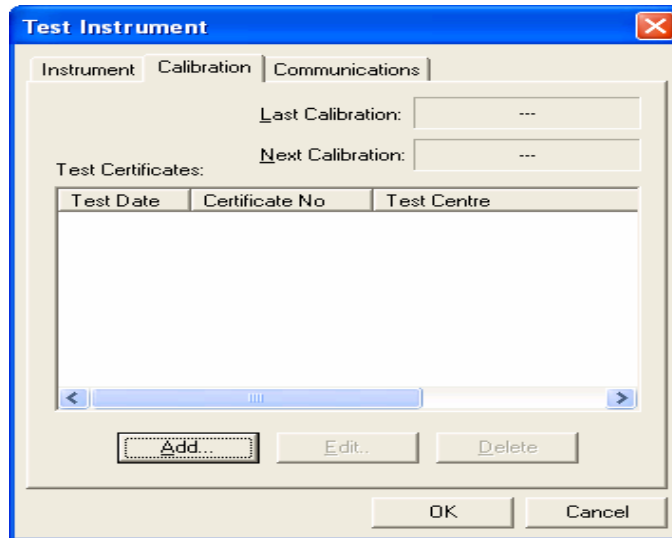


Figure 13: Calibration data entry form

This tab enables you to enter Calibration details for the Test Instrument. Simply select **Add** and fill out all the necessary details. This Calibration information will appear in the Test Instrument Details Report. One month before re-calibration is required a prompt will be displayed each time you Login to the program.

### The Communications Tab

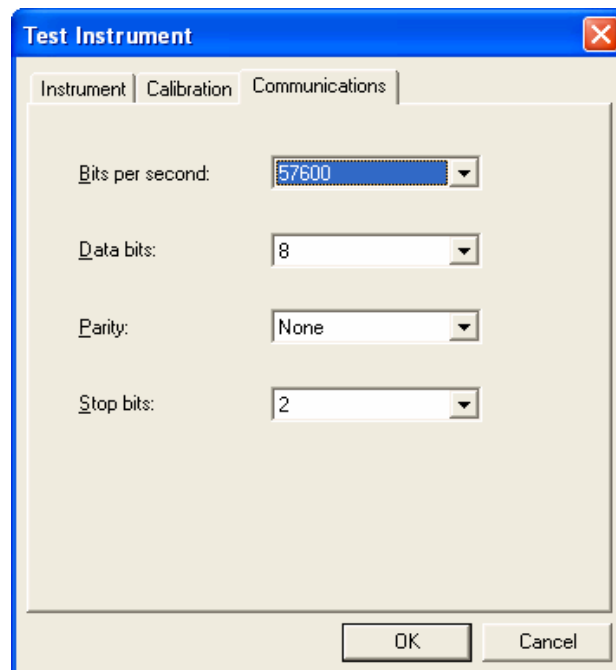


Figure 14: Communication data entry form

This tab contains the **Communications** settings for the Test Instrument. The default values are correct for each Test Instrument.

To change Communications settings select the appropriate drop down to make changes to the values, then select **OK** to save the changes.

## Navigating PATGuard Pro

### The Main Window

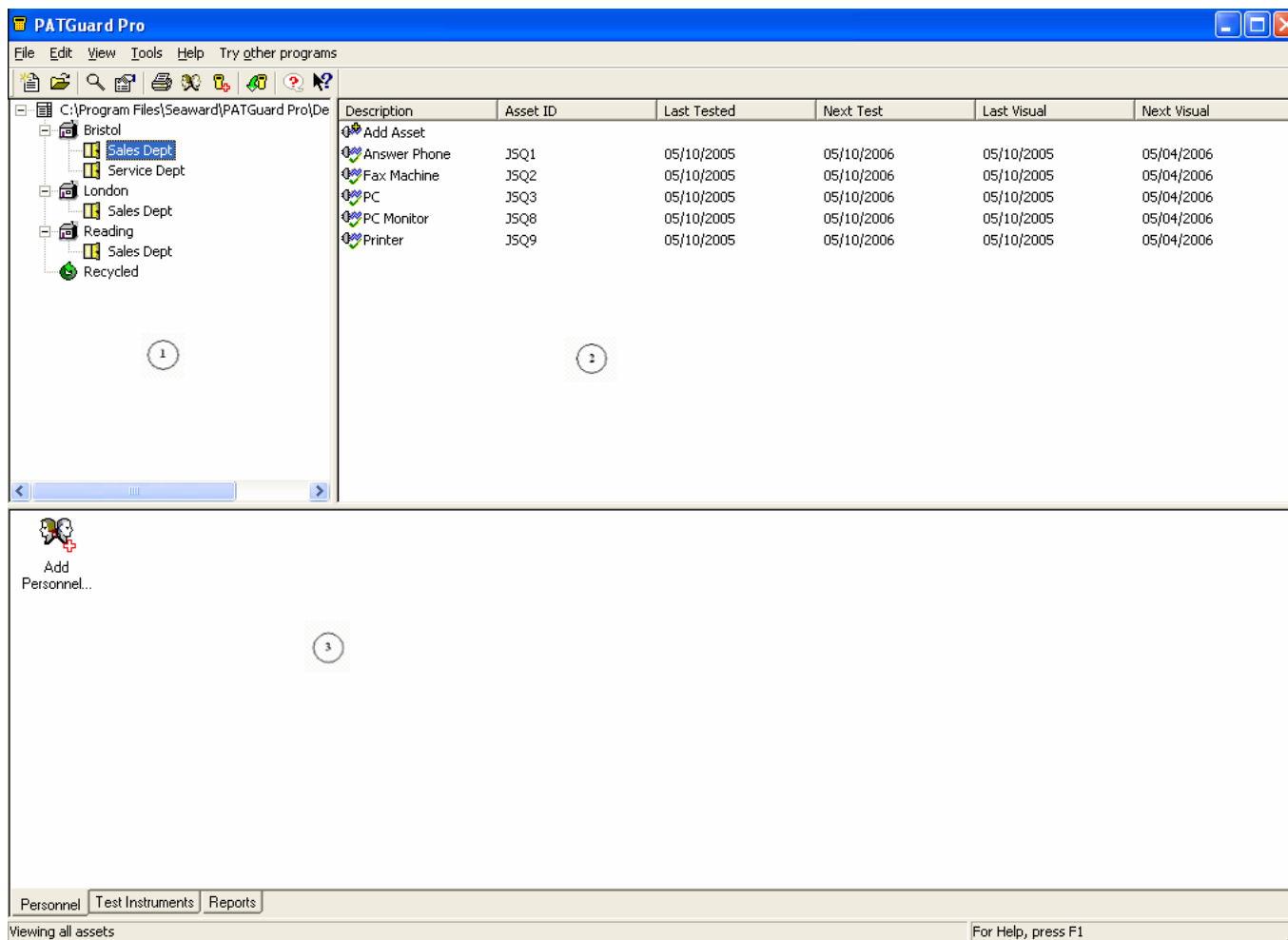


Figure 15: The Main window

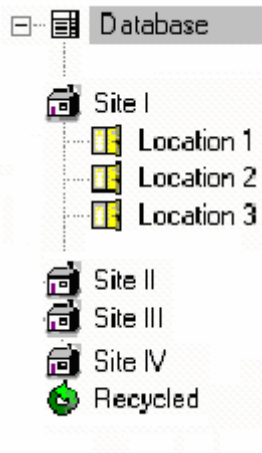
- ❶ The Tree View displays the Site and Location
- ❷ The Asset display area
- ❸ Tab views – Personnel, Test Instruments and Reports.

### Tree Data Structure

PATGuard Pro can only display one database at any one time although a number of databases can be created and selected from. When importing a legacy database (see Importing Legacy Data) a new database is automatically created for the imported legacy data.

The PATGuard Pro database is structured around the physical location (Site & Location) of Assets (items requiring testing such as portable appliances).





**Figure 16: Example PATGuard Pro database tree**

A Site may also contain a number of Locations, such as individual rooms or departments.

### **Asset View**

By selecting a Site or Location from within the tree the right-hand view will display all the Assets within the selected Site or Location.

The Asset text will be green if the Asset is untested, red if it is outside its re-test period and black if it is still within the test period.

Each Asset View column (Description, Asset ID, Last Tested, Next Tested, Last Visual, Next Visual) can be individually sorted in ascending or descending order by clicking the column title with the mouse pointer.

### **Main Window Operations**

The following operations are allowed within PATGuard Pro:

- A Site can only be created at the database level.
- A Location can only be created from within a Site.
- An Asset may be added directly to a Site or to a Location within a Site.

Sites and Locations may be added by either selecting the Add icon in the Asset display area or from the tree using the context menu (right hand mouse button). Then depending upon the item highlighted:

- **Add Site...** - Launches the **Site Details** dialog (see Adding Sites) to allow a new site to be created. This is available only from the database.
- **Add Location...** - Launches the **Location Details** dialog (see Adding Locations) to allow a new location to be created. This is available only from a Site.

All deleted Assets are placed in the **Recycled** bin. If the bin is emptied they will be deleted permanently. The contents of the bin will be displayed if Recycled is selected. Assets can be retrieved from the bin by selecting the Asset, right mouse click to display the context menu, then select **Restore**.

### **Context Menus**

All Icons have a right mouse button action. The following actions can be initiated from the right mouse button:

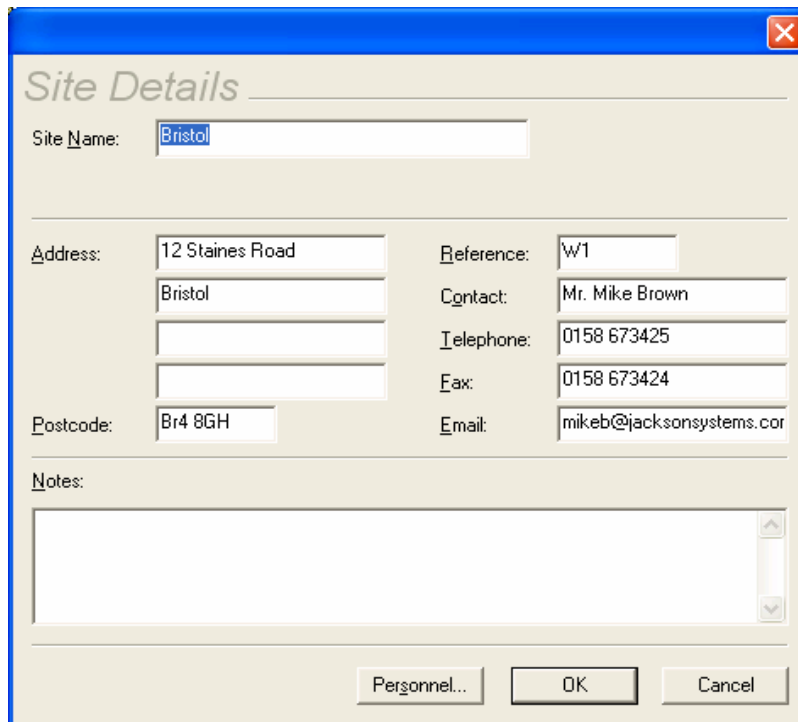
Database	Add Site
Site	Add Location Add Asset Add Visual Test Pass Send to PDA.. Rename Details.. Print Test Certificates.. Send To Delete
Location	Add Asset Add Visual Test Pass Send to PDA.. Rename Details Print Test Certificates.. Send To Delete
Assets	Restore if Recycled bin selected Clone Details.. Track Asset Print Test Certificate.. Add Visual Test Pass.. Test Results.. Delete
Recycled	Empty Recycled Bin

### ***Adding a Database***

From the **File** drop down select **New**. Enter the name of the new database into the **File name** field. Then **Save** to complete the action.

### ***Adding Sites***

To add a Site record, either double click the **Add Site** icon or highlight the database on the tree view and select **Add Site** from the context menu (right mouse button). Note the Site will be created below the currently highlighted item on the tree view.



The 'Site Details' form is a standard Windows-style dialog box with a blue title bar and a close button (X) in the top right corner. The title 'Site Details' is displayed in a large, italicized font. Below the title, there are several input fields: 'Site Name' with the value 'Bristol', 'Address' with '12 Staines Road' and 'Bristol', 'Reference' with 'W1', 'Contact' with 'Mr. Mike Brown', 'Telephone' with '0158 673425', 'Fax' with '0158 673424', and 'Email' with 'mikeb@jacksonsystems.cor'. A 'Postcode' field contains 'Br4 8GH'. At the bottom, there is a 'Notes' text area and three buttons: 'Personnel...', 'OK', and 'Cancel'.

Figure 17: Site Details entry form

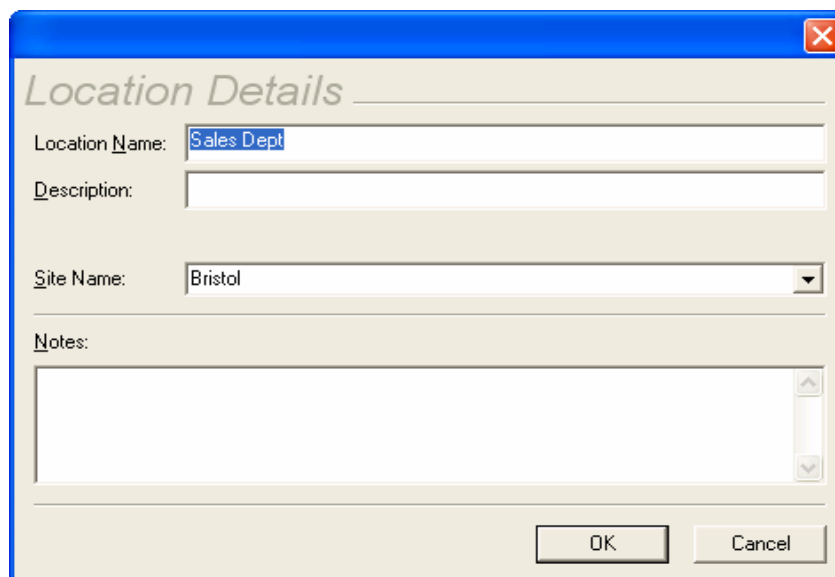
A blank data entry form will be displayed to allow a new site to be added to the currently open database, the **Site Name** is required for all new Sites and must be unique within the database all other fields such as **Address** etc are optional and may be updated at any time.

### Adding Locations

Locations can only be added from a Site only. To add a Location, either double click the **Add Location** icon or highlight the Site on the tree view and select **Add Location** from the context menu (right mouse button).

*Note*

*The Location will be created below the currently highlighted Site on the tree view.*



The 'Location Details' form is a standard Windows-style dialog box with a blue title bar and a close button (X) in the top right corner. The title 'Location Details' is displayed in a large, italicized font. Below the title, there are several input fields: 'Location Name' with the value 'Sales Dept', 'Description' (empty), 'Site Name' with a dropdown menu showing 'Bristol', and 'Notes' (empty). At the bottom, there are two buttons: 'OK' and 'Cancel'.

Figure 18: Location Details entry form

### **Adding Assets**

Assets can be added to either a Location or a Site only. To add an Asset record, either double click the **Add Asset** icon or highlight the Location or Site on the tree view and select **Add Asset** from the context menu (right mouse button). To duplicate an Asset use the **Clone** command from the Asset context menu.

#### *Note*

*The Asset will be created below the currently highlighted item on the tree view.*

The screenshot shows a window titled "Asset Details" with a blue border and a close button in the top right corner. The form is organized into several sections. The top section contains "Asset Id:" (JS01), "Description:" (Answer Phone), "Asset Group:" (<None>), "Site Name:" (Bristol), and "Location Name:" (Sales Dept). The middle section contains "Make:" (BT), "Model:" (SL77), "Serial No.:" (566673), "Test Code 1:" (I1C6003212), "Test Code 2:" (S22211111), and a checked "In Service" checkbox. The bottom section contains "Full Test" and "Visual Test" sections, each with "Test Period:" (User Defined), a numeric input field (1 for Full Test, 6 for Visual Test), a unit dropdown (Years for Full Test, Months for Visual Test), and "Next Due:" dates (17/11/2005 for Full Test, Overdue - 17/05/2005 for Visual Test). At the bottom of the form are buttons for "Notes...", "Test Results...", "<<", ">>", "OK", and "Cancel".

**Figure 19: Asset Details entry form**

### **Drag and Drop Operations**

The following drag and drop operations may be performed to reorganise the records:

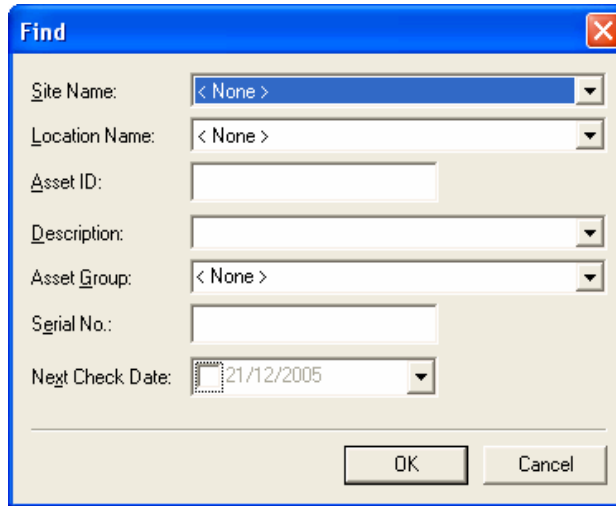
- Locations may be dragged between Sites in the tree.
- Assets may be dragged from the asset view to a new Site or Location by dropping them on the appropriate part of the tree view. All selected Assets will be moved when the drop is made.
- Locations may be dragged from the asset view to a Site on the tree view.

In all cases, items below the selected item on the tree will be moved.

### **Finding Assets**

To quickly find an Asset or group of Assets within the database the program contains a search facility.

From the **Edit** dropdown box select **Find** to display the following window.



**Figure 20: Find window**

Type the **Asset ID** or set other search criteria then select **Ok** to begin the search. The Asset will be shown highlighted when found.

If there is more than one Asset then the **Find Next** action will become available from the **Edit** drop down. Select **Find Next** to highlight other Assets found.

### ***Tracking Assets***

The program can display the previous locations of an Asset. Select the Asset and right mouse click to display the context menu. Select **Track Asset**. The program will highlight where the Asset was previously. To view earlier locations, take the mouse into the left hand half where the tree is displayed and left mouse click. Each mouse click will show the previous location until there are no further previous locations.

## Test Results

### Viewing Test Results

From the Asset Details dialog box (see Adding Assets), selecting the **Test Results** button will display the Test Results for that Asset.

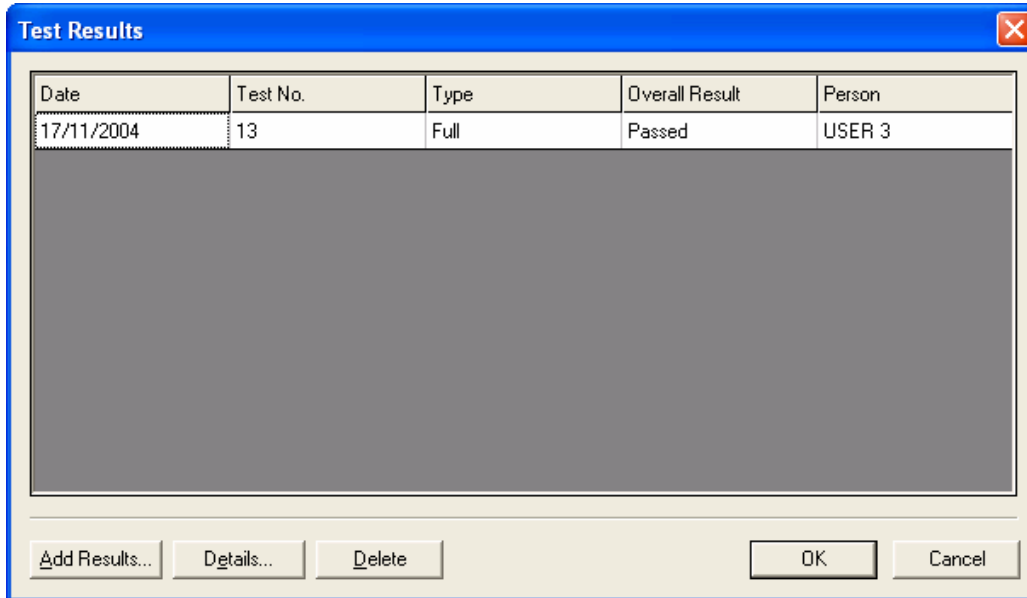


Figure 21: Test Results

Each complete set of Test Results is shown as a single line. Use the **Details...** button to display the detailed results for the selected line.

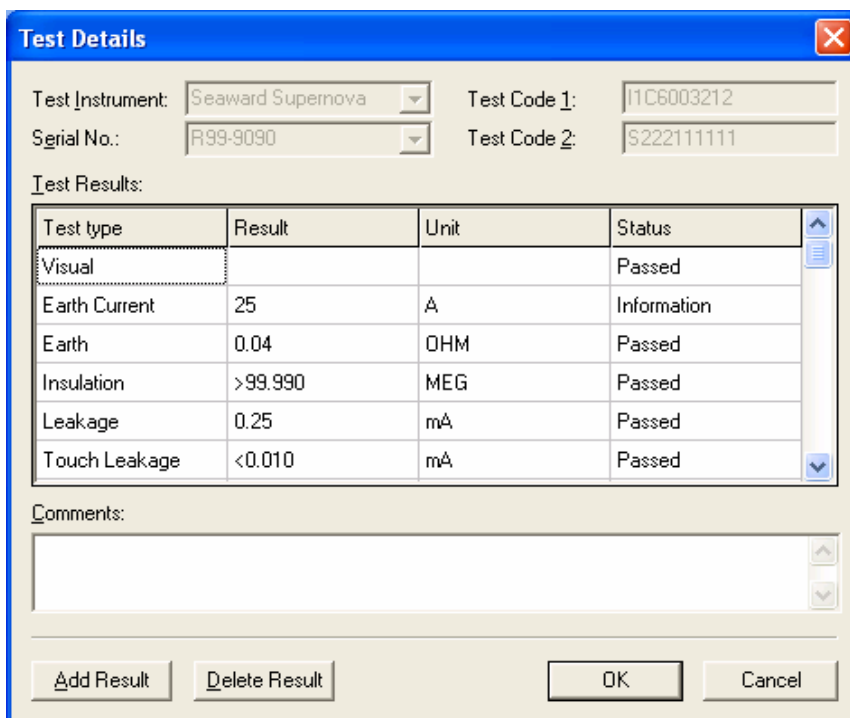


Figure 22: Test Details

The **Test Instrument** and **Serial No.** fields are automatically filled in from the selected download Tester. Some testers contain this information within the download data, in which case this will take precedence over the selected download tester. If the Testcode is sent by the PAT tester then it will be displayed in the Testcode fields. This Testcode defines the test that was carried out to obtain the results shown.

*Note*

*Only the Seaward Supernova and Europa family of PAT Testers are capable of sending the Testcode within the SSS download format.*

The **Test Details** are displayed according to **Test Type, Result, Unit** and **Status**. Test Results cannot be amended on this screen. The **Delete Result** button will allow an individual result to be deleted. The **Add Result** will allow a test to be added.

*Note*

*Users can be prevented from deleting results if their Access Status is set accordingly (see User Accounts).*

The **Comments** field can contain comments or text that was added at the end of the test by the PAT test operator depending on **PAT Options** (see Options). The **Comments** field can be edited, simply by selecting the field with the mouse and changes made. Any changes made will only be saved if the **OK** button is selected to leave the screen.

### **Manually Entering Test Results**

Where Test Results cannot be downloaded into the program, it is possible to enter the results manually. This would be the case if the PAT tester did not have a memory and therefore was incapable of being downloaded or to enter the results for Intermediate Visual tests only.

To enter a result directly, use the **Add Results...** button in the **Test Results** dialog box. This will cause the **Test Details** dialog box to be displayed.

Use the **Test Instrument** dropdown box to select an already registered tester or manually enter the tester details into the **Test Instrument** and **Serial No.** fields. The Testcode fields will normally not be valid for manual entry. Use the **Add Result** button to create a Test Result line. Use the drop down boxes to enter the **Test type, Result, Unit** and **Status**. Repeat the above for each Individual test. Use the **OK** button to save and leave this window. Test Types other than default can be entered and these will be added to the drop down list for future use.

### **Fast Visual Pass Entry**

The program enables Visual Test Passes to be entered quickly directly in the main window. At a Site, Location or Asset level use the context menu (right mouse action) and select **Add Visual Test Pass** all Assets at and below that level will have new Visual Tests added once the acknowledgement is accepted. All the tests will be passes, with the current date and Login name as the User name.

## Download

### Note

Before the program can communicate with a Test Instrument, the Test Instrument must be registered with the program (see Test Instruments).

### Downloading Test Results

Download is initiated from the **Tools** drop down or from the **Download** icon. Selecting either of these will cause the Download dialog box to be displayed.

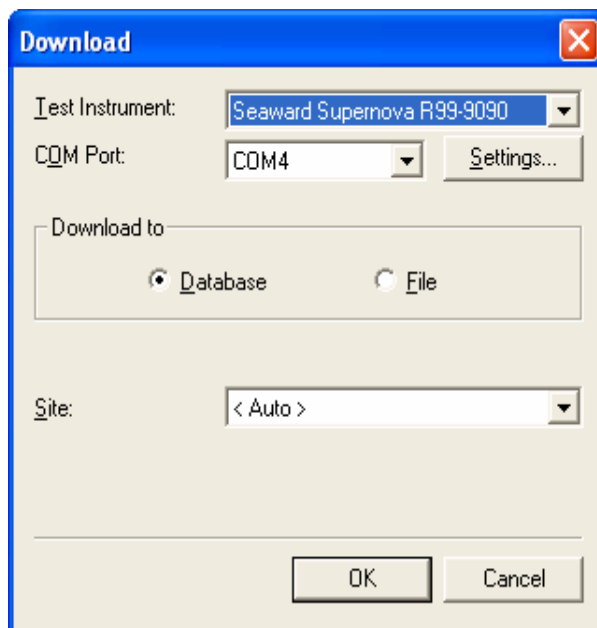


Figure 23: Download dialog box

The Download dialog box will have two additional fields available for testers that have ASCII text output only. These fields are required to process the download data from these testers.

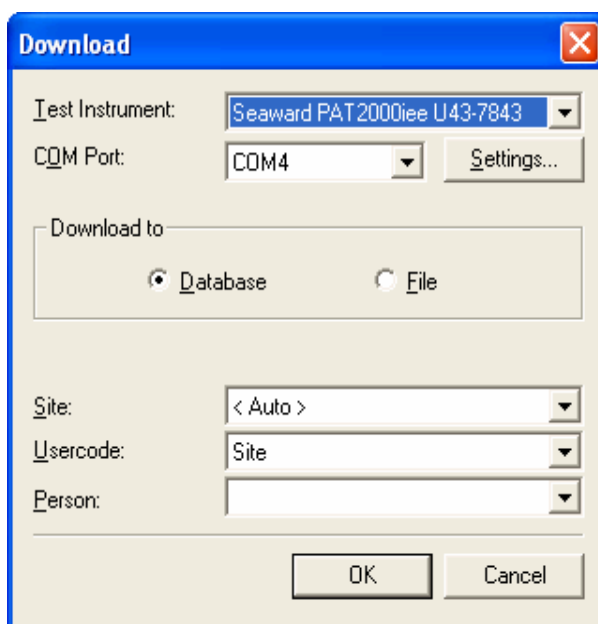


Figure 24: Download dialog box – additional fields



Downloaded data can either be sent to the database for processing or saved as a file. The file is a copy of the Test Results directly from the tester and depending on file type can be opened by other programs. Files previously created by PATGuard Pro can be opened in the program and the Test Results processed (see PATGuard Pro Files).

*Note*

*A Downloaded Test Result (either direct or via a file) which contains a Visual Test ONLY, will be treated as Visual Test Result.*

### **Download to Database**

Ensure the **Download to Database** radio button is selected. Choose a previously registered tester from the **Test Instrument** drop down. Select the appropriate serial port from the **COM Port** drop down.

*Note*

*Only serial ports that are free and available to the program will be included in the COM Port drop down.*

Test Results can be sent to an individual Site, chosen from the **Site** drop down, or <Auto>. Setting the Site field to <Auto> will allow Test Results for different Sites to be routed to those Sites. The <Auto> option requires the **Usercode** to be set to Site to route the Test Results to the correct Sites for non-SSS downloads.

The **Usercode** can be used to route multi-Site test results if set to Site and each test result contains a Site name in the **Usercode** field. Or the **Usercode** can be used to capture additional information, for example the individual personnel who carried out the testing. The **Usercode** field will only be available for testers with ASCII text output only.

Use the **Person** drop down to select from registered **Personnel** the appropriate person who carried out the testing. This is only required if the test results do not contain his information either directly or via the **Usercode**. The **Person** field will only be available for testers with ASCII text output only.

The **Settings...** button gives you the option to change the communications settings prior to download. This should not be necessary as the default settings are correct for each Test Instrument.

With the tester connected to the appropriate **COM Port**, select **OK** to commence the download. Initiate the download on the tester. See the tester Instruction Manual on how to commence a download action.

### **Automatic Location Change**

During a download if the test results indicate an Asset has changed Location a warning message is displayed to accept or reject this and subsequent Location changes.

### **Duplicate Test Results**

During a download if more than one Test Result with the same Asset ID and Site is detected a 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 to be deleted or amended by the user. Selecting No will cause the second Test Result to be appended to the first Test Result's Asset record.

### **View Last Download**

It is possible to view only newly created or updated Assets from the last download (or 'Opened' i.e. processed download file). From the **View** drop down select **Last Download Only**. Only Assets that were created or updated from the last download will be displayed. This is so the downloaded data can be examined and corrected if necessary. Newly created Asset icons have a 'star' to differentiate them from updated Assets. To switch back to a normal Asset display, de-select the **Last Download Only** at the **View** drop down.

### **Merging Test Results**

If downloaded Test Results have created additional Assets instead of updating existing Assets due to mistakes in Site, Location and Asset ID names etc. it is possible to correct the mistake by merging Test Results.

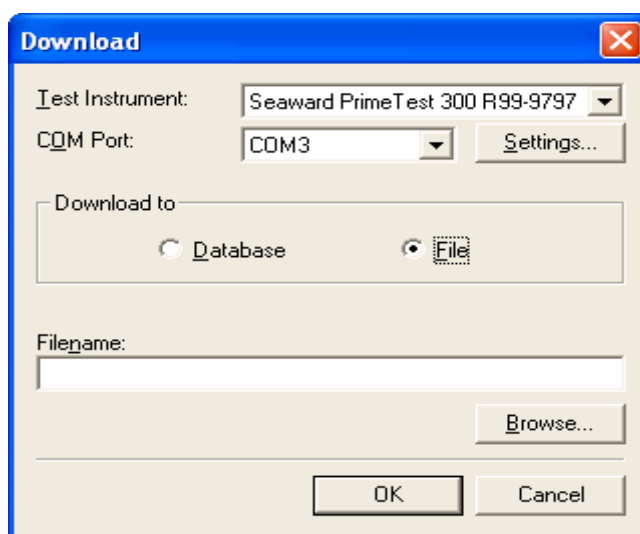
To do this, select the Site, Location or Asset 'drag and drop' them to another Site, Location or Asset where existing original Assets reside. Assets whose IDs are identical can be merged by confirming the PATGuard Pro message to merge.

#### *Note*

*Care should be taken in selection as Assets which cannot be merged (i.e. the Asset ID is unique within the Site) will simply be moved to the dropped tree level.*

### **Download to File**

Selecting **Download to File** will cause the following dialog box to appear.



**Figure 25: Download dialog box – File**

Enter a path and filename or use the **Browse...** button to choose a path available to your computer.

Some tester outputs require **File Type** set to **txt** as they output text ASCII data only. All current Seaward testers have an SSS format and as this format contains all data it is preferred. For these testers ensure that the format is SSS and set **File Type** to **sss**.

Choose a previously registered tester from the **Test Instrument** drop down. Select the appropriate serial port from the **COM Port** drop down.

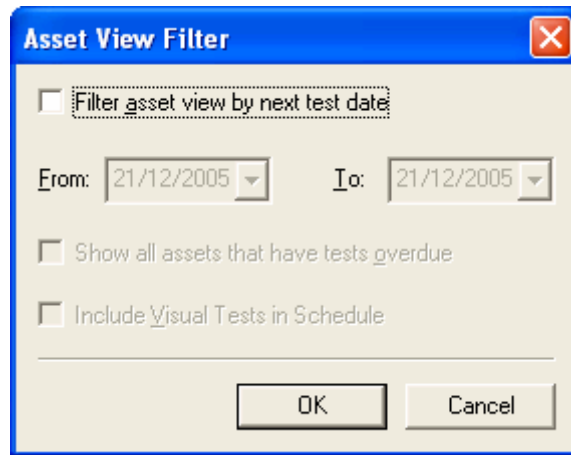
The **Settings...** button gives you the option to change the communications settings prior to download. This should not be necessary as the default settings are correct for each Test Instrument.

With the tester connected to the appropriate **COM port**, select **OK** to commence the download. Initiate the download on the tester. See the tester Instruction Manual on how to commence a download action.

Downloaded files can be processed into any database (see Opening Downloaded Files). Downloaded files are processed as if the data was coming directly from a real-time download.

## Test Schedule

To display a Test Schedule, select **Asset view filter...** from the **View** drop down. Check the **Filter asset view by next test date** to enable the date fields and other options.



**Figure 26: Asset View Filter**

If you wish to view only overdue Assets that require re-test, select **Show all assets that have overdue tests**. Then **OK** to action this selection.

To view Assets over a date period, enter the dates for the period that you wish to view a Test Schedule. To change the date, select the appropriate date drop down. A calendar is displayed. To change the year, select the year with the mouse, then use the up and down arrows to advance or retard the year. To change the month, select the left or right arrows with the mouse until the appropriate month is selected. To change a date within the month, simply select the appropriate date with the mouse.

To include Visual tests within the schedule then check the **Include Visual Test in Schedule** box otherwise the filter will select only Full Tests that meet the selection criteria.

*Note*

*Assets with no next test dates will be excluded.*

The current Schedule period is displayed in the lower Main window. To return to the full display, open the Asset View Filter dialog box as above and uncheck the **Filter asset view by next test date** box.

## PATGuard Pro Files

### Pat Files

PATGuard Pro 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 Pro can also send these files direct to an email program running on your PC.

### Creating a pat file

Select a Site, Location or Asset. The item selected and all lower level items will be copied. Right mouse click will display the context menu. Choose **Send to** either a **File** or **Email**. 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.

Selecting **Email** will create a Briefcase file in the current database directory whose filename will be the same as the database with an extension of pat (Briefcase type file). This is your copy of the file. The program will then create a new e-mail with the file attached ready to send.

### 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.

### Opening Download Files

Previously created download files (see Download to File) can be opened and the Test Results processed. Download files are of two types: **\*.txt** for those testers that only download in ASCII text format and **\*.sss** for Seaward Super String (SSS) downloads from current Seaward testers or generated by PATGuard Work About.

From the **File** drop down select **Open...** Select the path of the file you wish to process. Select the correct **File of type**. Then select **Open**. One of the following dialog boxes will be displayed depending on the file type.

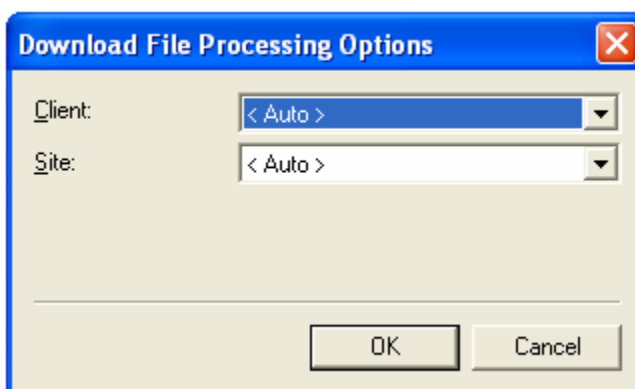
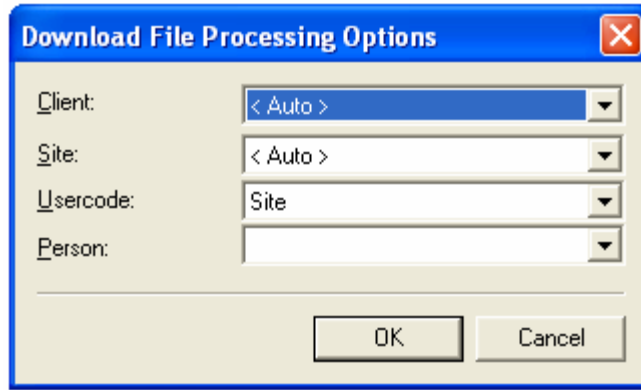


Figure 27: Download File Open – sss type



**Figure 28: Download File Open – txt type**

These dialog boxes allow you to set parameters for processing the file.

Test Results can be sent to an individual Site, chosen from the **Site** drop down, or <Auto>. Setting the Site field to <Auto> will allow Test Results for different Sites to be routed to those Sites. The <Auto> option requires the **Usercode** to be set to Site to route the Test Results to the correct Sites for non-SSS downloads.

The **Usercode** can be used to route multi-Site test results if set to Site and each test result contains a Site name in the **Usercode** field. Or the **Usercode** can be used to capture additional information, for example the individual personnel who carried out the testing. The **Usercode** field will only be available for testers with ASCII text output only.

Use the **Person** drop down to select from registered **Personnel** the appropriate person who carried out the testing. This is only required if the test results do not contain his information either directly or via the **Usercode**. The **Person** field will only be available for testers with ASCII text output only.

The download data will be processed as if it came directly from the PAT tester.

### **Spreadsheet Files**

PATGuard Pro has the ability to create spreadsheet Asset record files of different levels of the database as a comma separated variable (csv) file which can be opened by spreadsheet applications such as Windows Excel.

To create a spreadsheet, select a Site, Location or Asset. The item selected and all lower level items will be included in the file. Right mouse click will display the context menu. Choose **Send to...** then **File**. A **Save As** dialog box will be displayed. Select the path and File name where the file is to be saved. Spreadsheet files have a **File Type** of \*.csv. Select **Save** to create the file.

### **Upload Files**

Upload files can be created at any level by selecting the Site, Location or Asset, then right mouse click to display the context menu and selecting **Send to PDA...** A **Save As...** window is then displayed to enable a path and filename to be set. The Upload file type is **xpg**. This file when saved will contain a PDA version of the records at the selected level.

These files are used by PATGuard Work About which is the PDA version of this program. For a trial version select **Try other programs** and select PATGuard Work About.

## Reports

At the bottom of the main screen are three tabs: **Personnel**, **Test Instruments** and **Reports**. Select the **Reports** tab to display a range of Reports that can be created from the database. Double click the Report icon to initiate a particular Report.

All reports require a demarcation of the data to be included in the Report. When a Report is selected, the program will next display a data selection dialog box specific to that report. Use the drop downs and other fields to narrow the range of data to be included in the Report. Blank fields or a <none> selection will widen the range of data to be included in the Report.

Some Reports require a period over which the Report is to run. To change the dates that the Report will cover, select the appropriate **Date** drop down, to display a calendar. To change the year, select the year with the mouse, then use the up and down arrows to advance or retard the year. To change the month select the left and right arrows with the mouse until the appropriate month is selected. To change a date within the month, simply select the appropriate date with the mouse.


Once the Search criteria is specified, select OK to launch the **Report Preview**.

### *Note*


*If the information does not appear in the Report that you expect, check or widen the search criteria. Remember Reports are generated from information in the database, if it is not in the database it cannot be printed*

### **Report Preview**


This program will display the Report, as it would be printed.


Use  to view other pages.


Use  to zoom in or out.

Use  to print the current page. Use right mouse button for printer settings.

Use  to print all pages. Use right mouse button for printer settings.

Use  to attach the Report to e-mail.

Use  to save the Report as a file. Use **File Type** to save files other than **\*.ll**. (default). Use the Saved Report Viewer within the program group to view saved Reports for **File Type \*.ll**. Reports can be saved as pdf files for use with Adobe Acrobat.

Use  to exit the Preview.

All Report icons have a right mouse button action. The following actions can be initiated from the right mouse button:

Edit  
Copy  
Delete  
Restore  
Print  
Preview

PATGuard Pro allows flexibility in the Reports available to the user, in that Reports can be edited in terms of their style, copied, deleted and the default Reports can be restored (after previously being deleted). See Reports Designer Help in the program group to use these commands.

The default Reports within the program are:

***Concise Asset List***

This Report will print a list of Assets together with their Descriptions for each Location within the Sites selected. A total of the number of Assets contained in the report is included.

***Detailed Asset List***

The Report will print all the details about the Asset for selected Assets. This consists of Asset Id, Description, Make, Model, Serial No. and Location within a Site. A total of the number of Assets contained in the report is included.

***Concise Task Checklist***

This Report consists of Test Date details for selected Assets in Locations at selected Sites.

***Concise Latest Test Results***

This Report consists of latest Test Results in terms of Test Status, Test Period and Test Dates for selected Assets in Locations at selected Sites. It also contains Test instruments where the Test Results originated. A total of the number of Assets contained in the report is included.

***Concise Test History***

This Report consists of test history in terms of Test Status for selected Assets in Locations at selected Sites. It also contains Test instruments where the Test Results originated. A total of the number of Assets contained in the report is included.

***Detailed Latest Test Results***

This Report consists of detailed Test Results for selected Assets in Locations at selected Sites. A total of the number of Assets contained in the report is included.

***Detailed Test History***

This Report consists of all detailed Test Results for selected Assets in Locations at selected Sites. A total of the number of Assets contained in the report is included.

***Test Certificates***

This Report is a Test Certificate of the latest Test Result per page for selected Assets in Locations at selected Sites. This Report can also be launched from the context menu of Assets, Locations and Sites.

***Short Code Details***

This Report consists of details of any Short Codes set in the PAT Options dialog box.

## Utility Software

The PATGuard Pro program group contains two utility programs for use with Supernova and Europa type testers; Tester Software Update and Tester Logo Transfer. These programs have specific actions which help support the Seaward Supernova / Europa range of testers.

There is also a utility program for use with the PrimeTest 300: PrimeTest Blue Tooth Downloader

### Tester Software Update

This program is used to update the software in the Supernova / Europa testers.

#### CAUTION

*Do not use this program to update the software in your tester as you may install the wrong software and thus disable the tester. This program is for use with certain accessories which require other tester software to be installed. Information on how to do this is provided with these accessories. It may also be used at the request of Seaward Technical Support or their representatives who may provide a software file.*

The following is guidance on using this program should you be requested to do so.

#### CAUTION

*Before updating the tester and any PC software; download the tester (if the results in memory are of value) as it is necessary to CLEAR RESULTS MEMORY and CLEAR UPLOAD MEMORY after the update. Failure to comply with the above will render any results irretrievable after update.*

Connect from the tester serial port to the PC serial port with the Download Lead supplied.

From Windows Start select the Seaward PATGuard Pro group (from where the PATGuard Pro program can be launched).

Run the Tester Software Update program. The following screen is displayed:

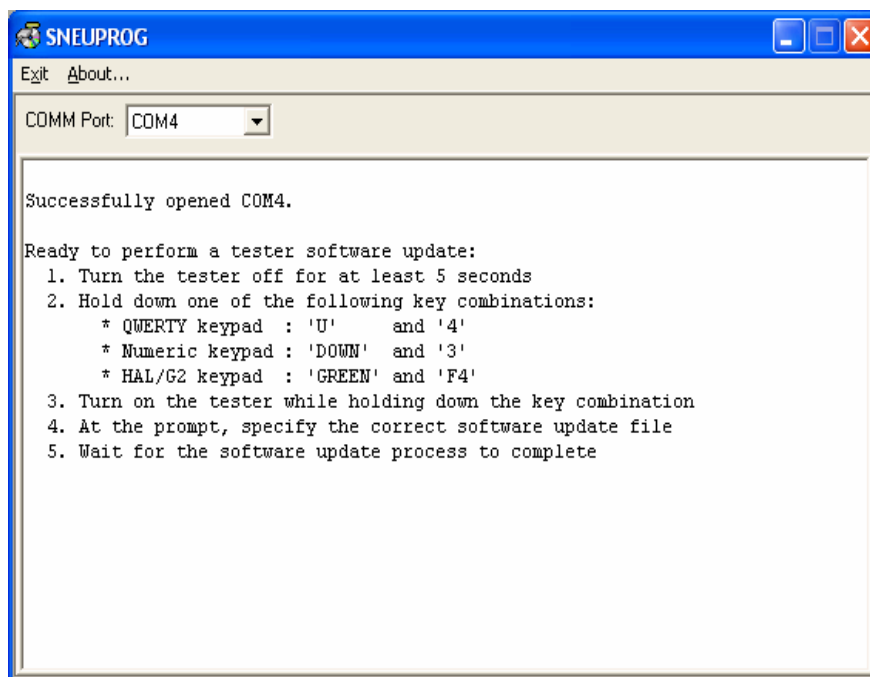


Figure 29: Tester update dialog box

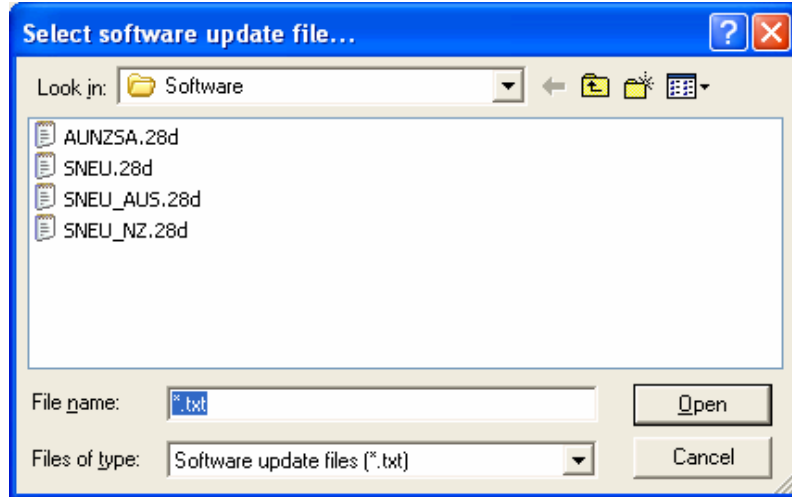
Follow the instruction on the screen to put the tester into Software Update mode.



*Note*

*QWERTY keypad refers to Seaward Supernova Plus, Supernova XE, Supernova, Europa Plus testers, Numeric keypad refers to Seaward Europa testers, HAL/G2 refers to specific Clare tester models.*

When the tester and the program have established communications the following screen will be displayed:

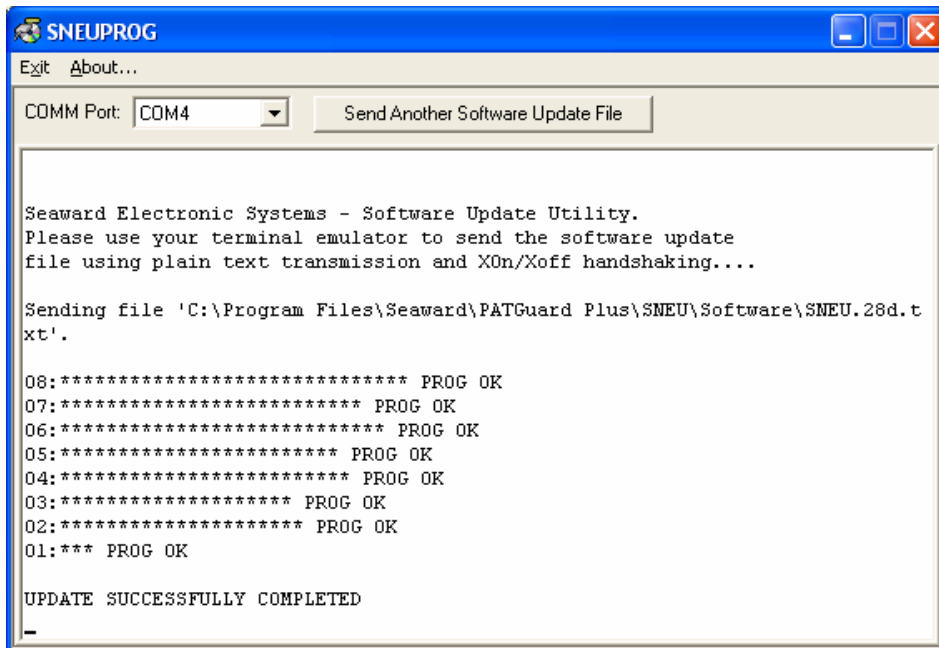


**Figure 30: Select software update file dialog box**

It is necessary to select the correct software update file to be loaded into the tester. Select and open the appropriate file.

The update to the tester will start automatically, its progress shown in the program window.

When the update has completed successfully, the following screen is displayed:



**Figure 31: Update successfully completed**

Select **Exit** at the Toolbar to close the program.

*Note*

*Should the update fail part way through for whatever reason, perhaps the cable is accidentally disconnected then it is not necessary to re-establish communication. By selecting the button **Send Another Software Update File** the file can be re-selected and sent again.*

To complete the update process on the tester, power off the tester then power back on after about 5 seconds checking that the new software version number is displayed.

It is necessary to restore **FACTORY SETTING**, **CLEAR RESULTS MEMORY** and **CLEAR UPLOAD MEMORY** on the tester to enable the new software to function correctly (see the tester Instruction Manual).

**Tester Logo Transfer**

This program is used to transfer a label title and a logo to the tester for use with the Seaward Test 'N' Tag System. Full details on using this are provided with the Test 'N' Tag System. This program has no use other than with the Test 'N' Tag System.

**Prime Test Bluetooth Downloader**

This Utility program is a copy of the program supplied on a CD with the PrimeTest 300 tester. Refer to the PrimeTest 300 Operating Instructions on how to use this program.

## Program Specification

The program group consists of:

Reports Designer Help  
Seaward PATGuard Pro Help  
Seaward PATGuard Pro User Manual  
Seaward PATGuard Pro  
Uninstall PATGuard Pro  
Saved Report Viewer  
Tester Logo Transfer  
Tester Software Update  
PrimeTest Bluetooth Downloader

The program can receive downloaded data from the following PAT testers:

PAT1000	Europa	Ethos 9600	Avo PAT4
PAT1000S	Europa Plus	Ethos 9500	Avo PAT4F
PAT1000X	Europa PAC Plus	Ethos 9300	Robin SmartPAT 5000
IT1000	Europa XE	Clare HAL	Robin SmartPAT 5500
PAT2000	Europa XE Plus	Clare HAL Combi	Metrohm MicroPAT+
PAT2000i	Supernova	Clare SafeCheck 8	Metrel OmegaPAT
PAT2000iee	Supernova Plus	Clare SafeTest Luminaire	Metrel BetaPAT
SEN60204	Supernova XE	Clare SafeTest Manufacturing	
	Supernova XE Plus	Emona Maestro	
	PrimeTest 300		

## **System Requirements**

IBM Compatible PC

Processor Speed 500MHz or higher

Microsoft Windows 98/NT/2000/ME/XP

64Mb RAM

50Mb available hard disk space

Colour monitor with 256 colour (8 bit) or greater video card

CD ROM drive

## Accessories

Download lead for:		Part Number	194A907
PAT1000	Robin SmartPAT 5000		
PAT1000S	Metrohm MicroPAT		
PAT1000X			
PAT2000			

Download lead for:		Part Number	194A919
Europa PAC Plus	IT1000		
Europa	PAT2000i		
Europa Plus	PAT2000iee		
Europa XE	SEN60204		
Europa XE Plus			
Supernova			
Supernova Plus			
Supernova XE			
Supernova XE Plus			

Additional PATGuard Pro Licenses	Part Number	352A925
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PATGuard Elite Upgrade	Part Number	352A924
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PATGuard Time Manager software	Part Number	334A910
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PATGuard Work About software	Part Number	336A910
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## Warranty and Support

Seaward Electronic Ltd provide a 1 year warranty for this software package (see License Agreement). A pre-requirement for Warranty and Support is that the Warranty Registration card is completed and returned to us within 7 days of installing the program.

Telephone Support is provided free for the first 30 days. To receive Telephone Support after the initial 30 days, a Software Support Agreement would need to be taken out directly with Seaward Electronic Ltd.

For this and further information contact:

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