



PATGuard Elite

User Manual

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PATGuard Elite

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Introduction

Welcome to PATGuard Elite, Seaward's premier software for safety record keeping. PATGuard Elite is fully integrated with Seaward PAT testers to ensure increased productivity with less time spent at the keyboard. While versatility is provided through the capability of processing data download from most portable appliance testers currently available.

With its unique email safety alert system for automatic re-test scheduling and CD Viewer Generator, PATGuard Elite is the most advanced PAT record management program available today.

With easy to use and automated features associated with the acclaimed PATGuard style, PATGuard Elite is for users who require the ultimate PAT record system with unique features especially developed for service providers.

Developed from the acclaimed PATGuard Plus and PATGuard e-Scheduler programs, this new software takes a significant leap forward for this type of program, emphasising Seaward's position as No 1 in PAT Testing.

Installing PATGuard Elite

Note

Before installing PATGuard Elite ensure no other application programs are running.

Installing PATGuard Elite 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 Elite, 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 Elite, 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.

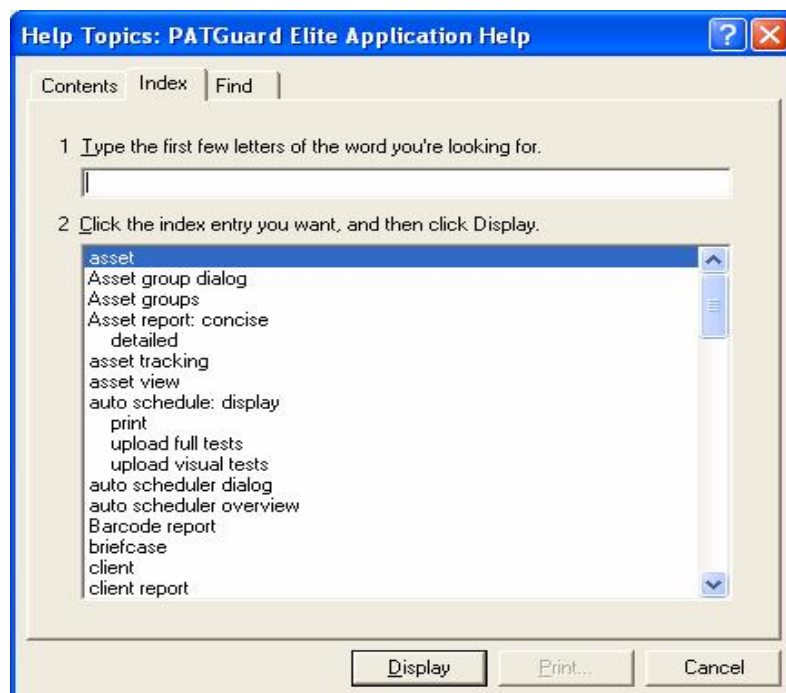


Figure 1: Help Index window

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

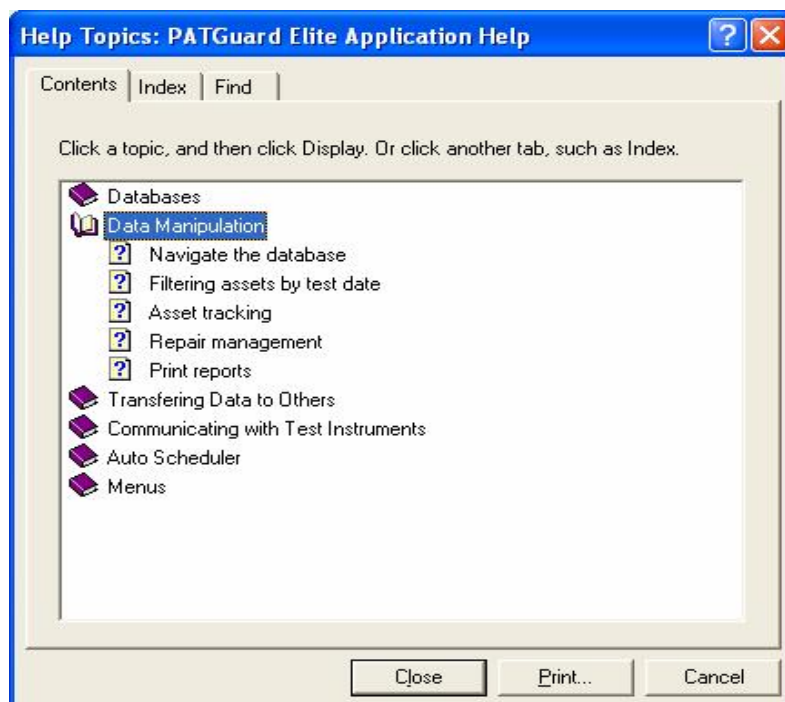


Figure 2: Help Contents window

- **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

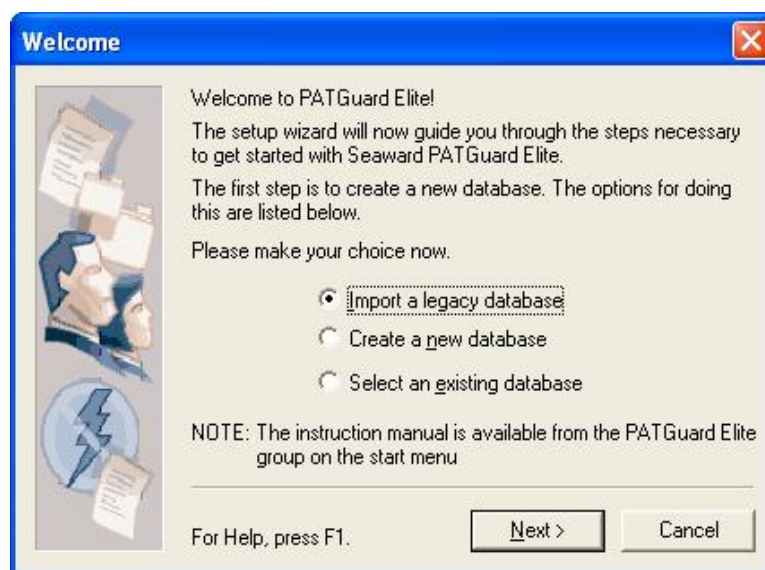


Figure 3: Setup Wizard entry window

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.

PATGuard e-Manager

A PATGuard e-Manager Welcome screen is also displayed for PATGuard e-Scheduler to send email safety alerts.



Figure 4: PATGuard e-Manager Welcome window

Pressing the **Next** button will display the following dialog box.

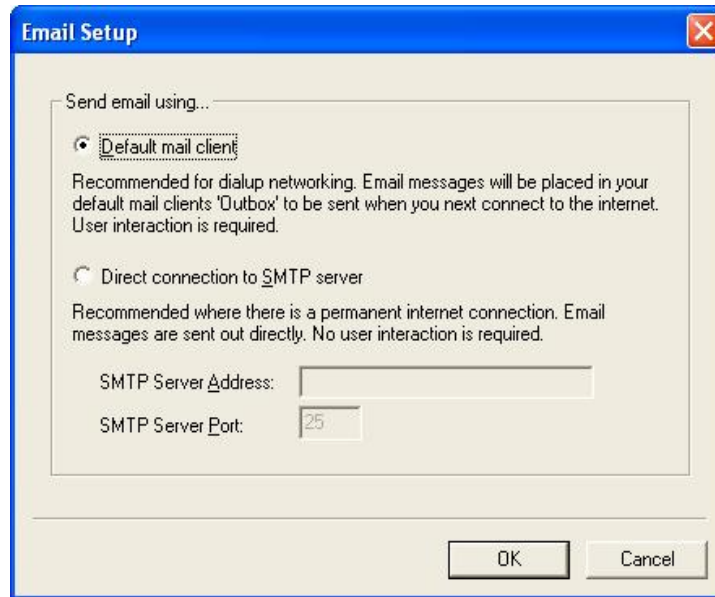


Figure 5: Email Setup dialog box

To allow for different email systems, **Email Setup** will enable the user to set the appropriate values to match the computer's email. Select the appropriate option and for SMTP servers set the address and port. Select **OK** to save the settings.

Importing Legacy Data

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

Note

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

However data cannot be imported into an existing PATGuard Elite 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 Elite.
5. A log will be displayed after the import.
6. PATGuard Elite will now have the new database selected.

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

Company details

User Accounts

Options

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

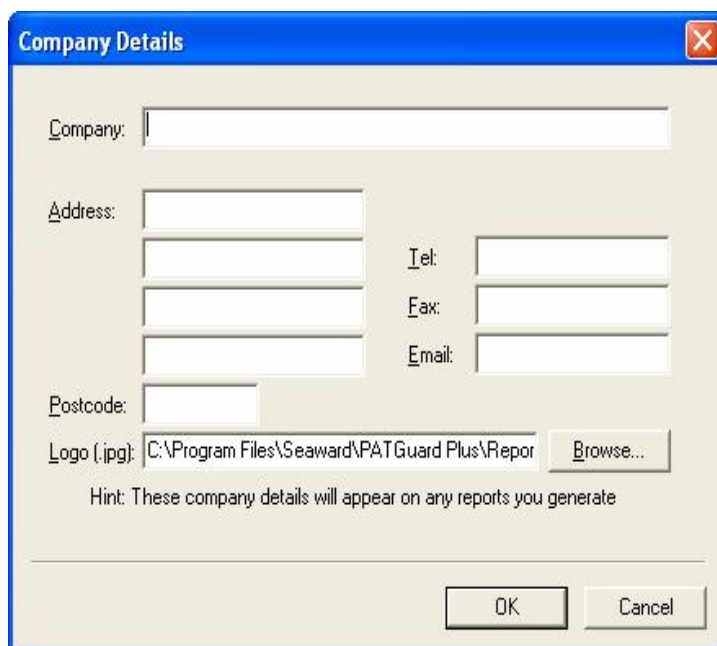
To Delete a database:

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...



The image shows a Windows-style dialog box titled "Company Details" with a blue title bar and a close button (X) in the top right corner. The dialog box has a light beige background. It contains several text input fields: a single-line field for "Company:", a three-line field for "Address:", a single-line field for "Postcode:", a single-line field for "Tel:", a single-line field for "Fax:", and a single-line field for "Email:". Below these fields is a "Logo (.jpg):" field with a text box containing the path "C:\Program Files\Seaward\PATGuard Plus\Repor" and a "Browse..." button to its right. At the bottom of the dialog box, there is a hint text: "Hint: These company details will appear on any reports you generate". At the very bottom, there are two buttons: "OK" and "Cancel".

Figure 6: 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 and in email Reports launched by PATGuard e-Scheduler

User Accounts

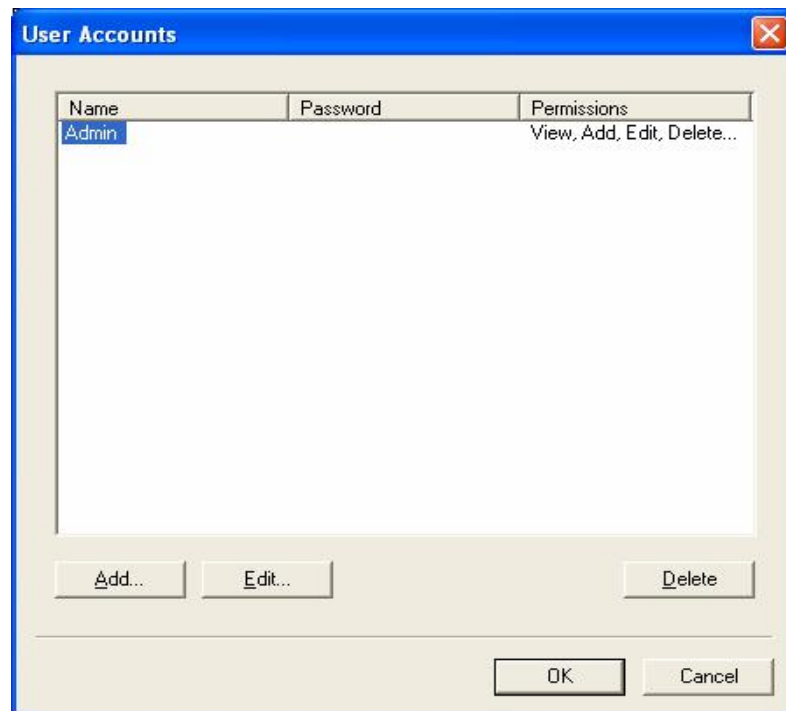


Figure 5: User Accounts window

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 Elite their routing to the correct Site and Location is dependent upon a number of options within the program.

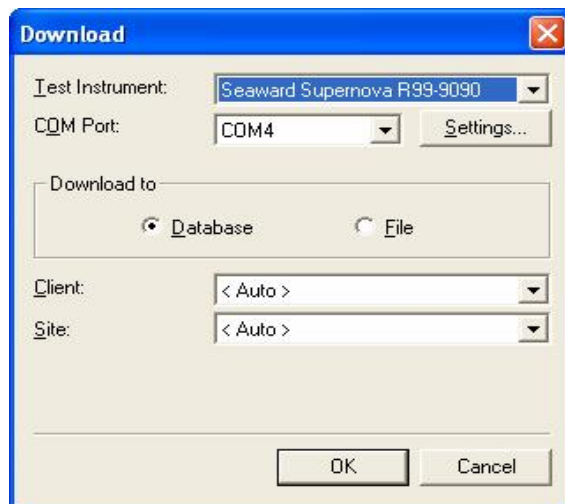


Figure 7: Download dialog box

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.

The **Client** drop down will enable Assets to be automatically moved between Sites for the selected **Client**, if the downloaded data indicates a Site re-location. The program will only allow this if Asset IDs are unique across all Sites for the selected **Client**. Leaving the **Client** set to <Auto> will not restrict the download to one Client but allow the downloaded data to be processed for the whole database (assuming **Site** is also set to <Auto>), these are the normal settings.

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.

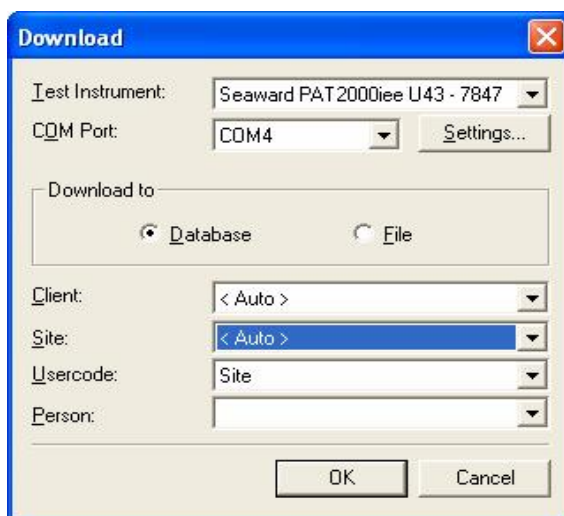


Figure 8: Download dialog box – additional fields

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...**

Options

PAT Options | Asset Groups

Tester Output

Text Line 1: Asset Description Text Line 3: Notes

Text Line 2: Notes Text Line 4: Notes

☐ 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

Figure 9: 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 Elite will recognise the value as a **Short Code**.

Asset Groups

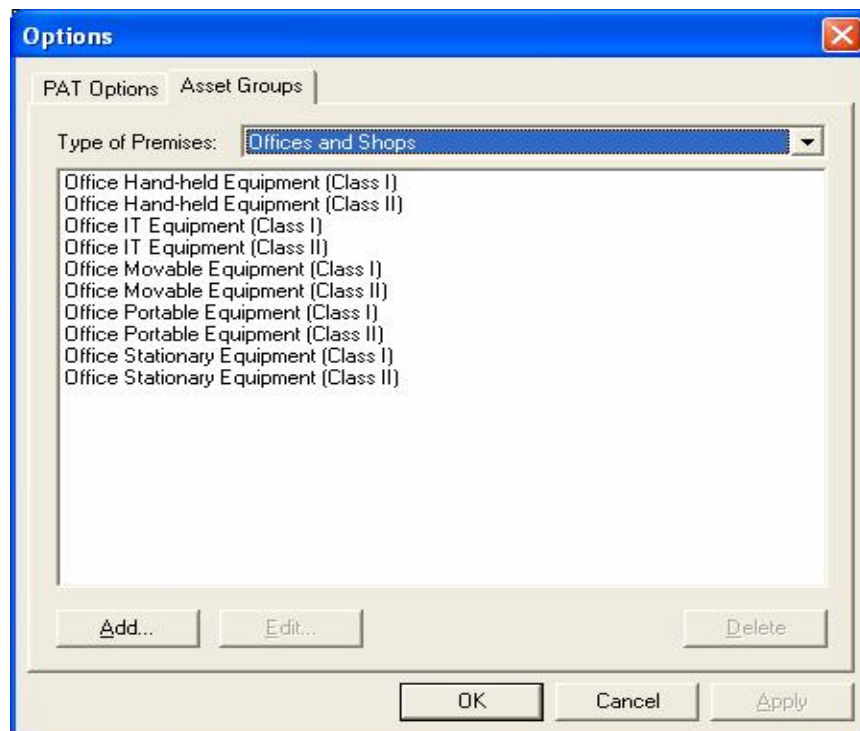


Figure 10: Asset Groups dialog box

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.

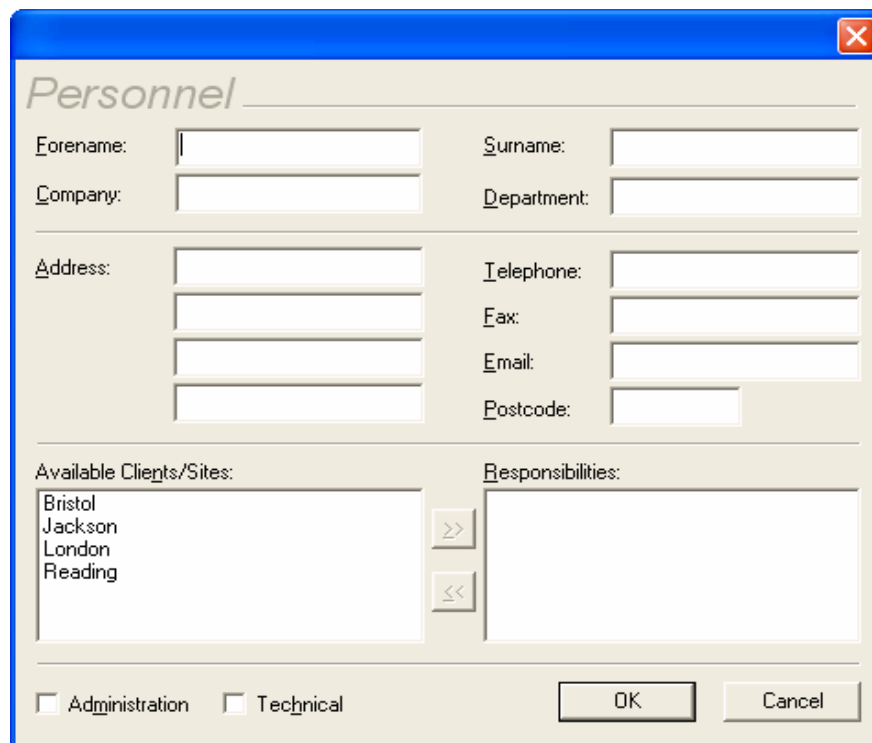


Figure 11: Own Personnel data entry form

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 Clients and/or Sites by selecting from the Available list and using the move button to set the Client or Site into the Responsibility list. Personnel assigned to a particular Client will be displayed in the Client dialog box (see Adding Clients).

Note

Personnel Email addresses entered here are available in the Configure Email dialog box for those Sites for which the Personnel have responsibility. Configure Email is selected from the Auto Scheduler dialog box of the chosen Site. (see Auto Scheduler).

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 Clients Personnel based at individual Clients, Sites or Locations can be entered by selecting the appropriate Client, 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.

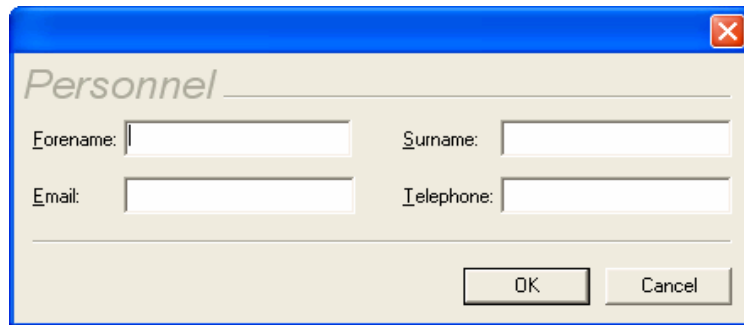
A screenshot of a software dialog box titled "Personnel". The dialog box has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains four text input fields arranged in a 2x2 grid. The top row has "Forename:" and "Surname:" labels. The bottom row has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

Figure 12: Client, Site, Location Personnel data entry form

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

Note

Email addresses entered here are available (depending on context) for use by the Auto Scheduler (see PATGuard e-Scheduler).

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.

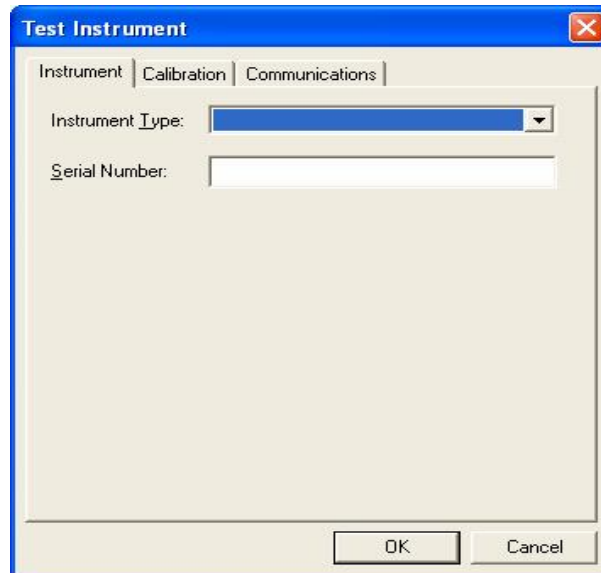


Figure 13: Test Instrument data entry form

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

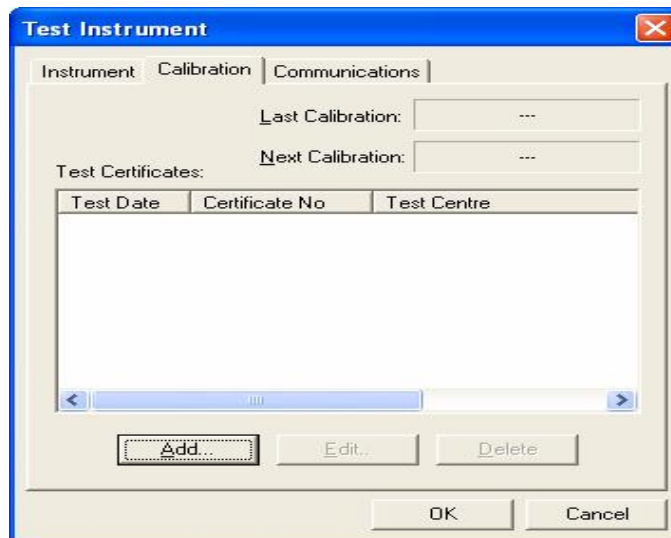
The screenshot shows the 'Test Instrument' dialog box with the 'Calibration' tab selected. It features fields for 'Last Calibration' and 'Next Calibration', both currently set to '---'. Below these is a section for 'Test Certificates' with a table header containing 'Test Date', 'Certificate No', and 'Test Centre'. The table itself is empty. At the bottom of the table area are three buttons: 'Add...', 'Edit..', and 'Delete'. The overall dialog has 'OK' and 'Cancel' buttons at the very bottom.

Figure 14: 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

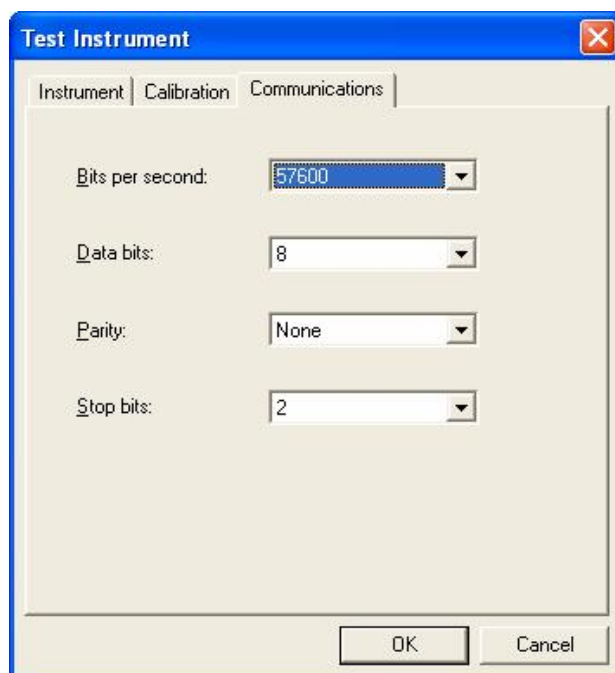
The screenshot shows the 'Test Instrument' dialog box with the 'Communications' tab selected. It contains four settings, each with a label and a dropdown menu: 'Bits per second' (set to 57600), 'Data bits' (set to 8), 'Parity' (set to None), and 'Stop bits' (set to 2). The 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

Figure 15: 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 Elite

The Main Window

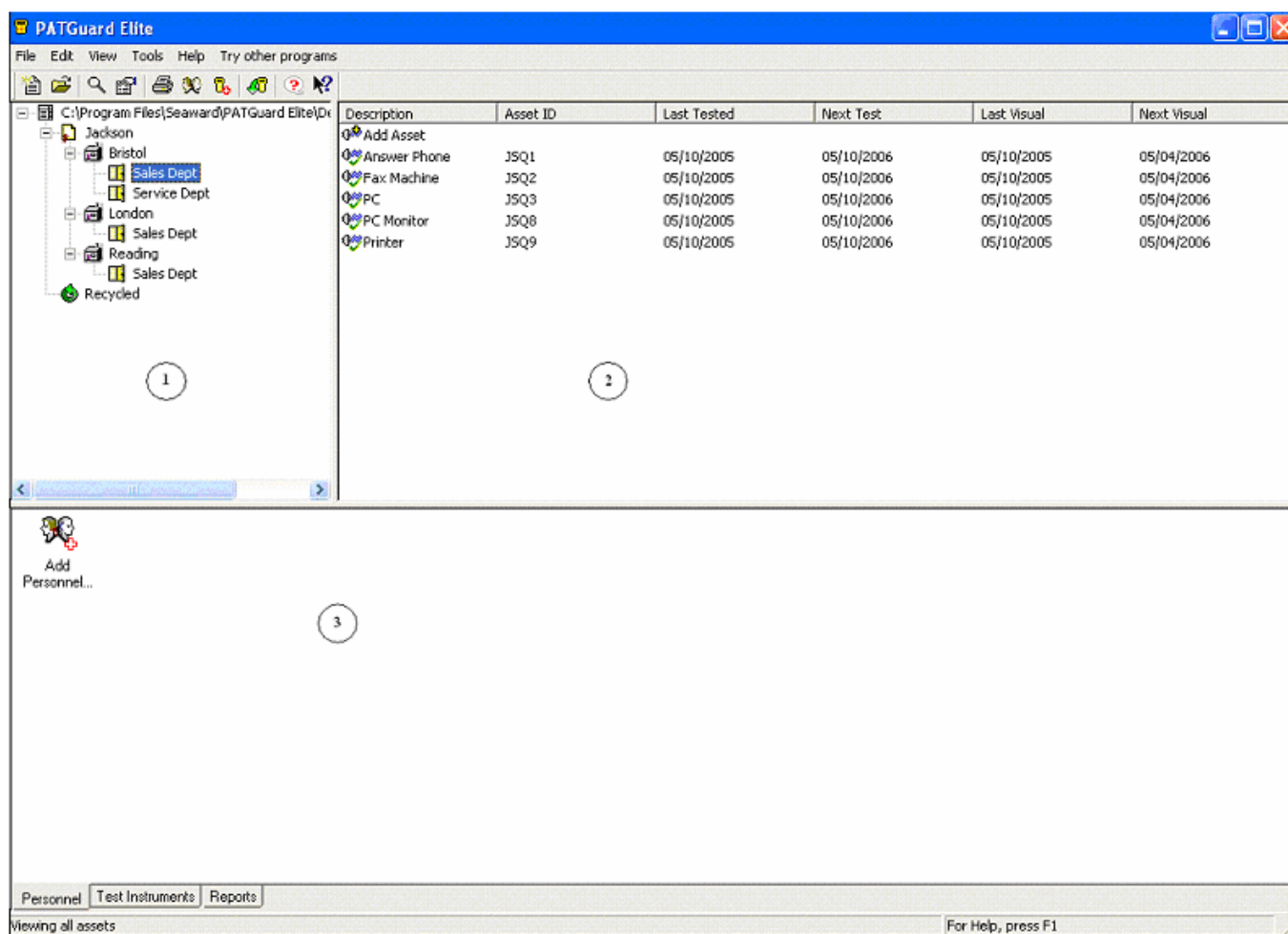


Figure 16: The Main window

u The Tree View displays the Client, Site and Location

v The Asset display area

w Tab views – Personnel, Test Instruments and Reports.

Tree Data Structure

PATGuard Elite 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 Elite database is structured around the owner (Client) and physical location (Site & Location) of Assets (items requiring testing such as portable appliances).

Within PATGuard Elite a Client is a company or organisation that owns the Assets and a Site (or Location within the Site) the physical location where the Assets are situated.

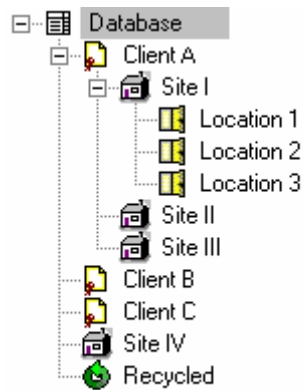


Figure 17: Example PATGuard Elite database tree

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 Elite:

- A Client can be created at the database level only.
- A Site may be created at either the database level or from within an existing Client.
- 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.
- A Test Sequence can be created at a Client level only.

Clients, 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 Client...** - Launches the **Client Details** dialog (see Adding Clients) to allow a new client to be created. This is available only from the database.
- **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 and Client.
- **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 Client Add Site Create Viewer CD Image..
Client	Add Site Add Test Sequence.. Auto Scheduler.. Create Viewer CD Image.. Create Test Sequences.. Upload Sites.. Upload Test Sequences.. Upload Assets.. Rename Details.. Send To Delete
Site	Add Location Add Asset Add Visual Test Pass Auto Scheduler.. Create Test Sequences.. Upload Site.. Upload Locations.. Upload Assets.. Rename Details.. Print Test Certificates.. Send To Delete
Location	Add Asset Add Visual Test Pass Auto Scheduler.. Create Test Sequences.. Upload Location.. Upload Assets.. Rename Details Print Test Certificates.. Send To Delete
Assets	Upload.. (Restore if Recycled bin selected) Clone Create Test Sequence.. Details..

Track Asset
Print Test Certificate..
Add Visual Test Pass..
Test Results..
Delete

Test Sequence Upload Test Sequence..
Details..
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 Clients

To add a Client record, double click the **Add Client** icon or highlight the database on the tree view, right click the mouse to display the context menu then select **Add Client**.

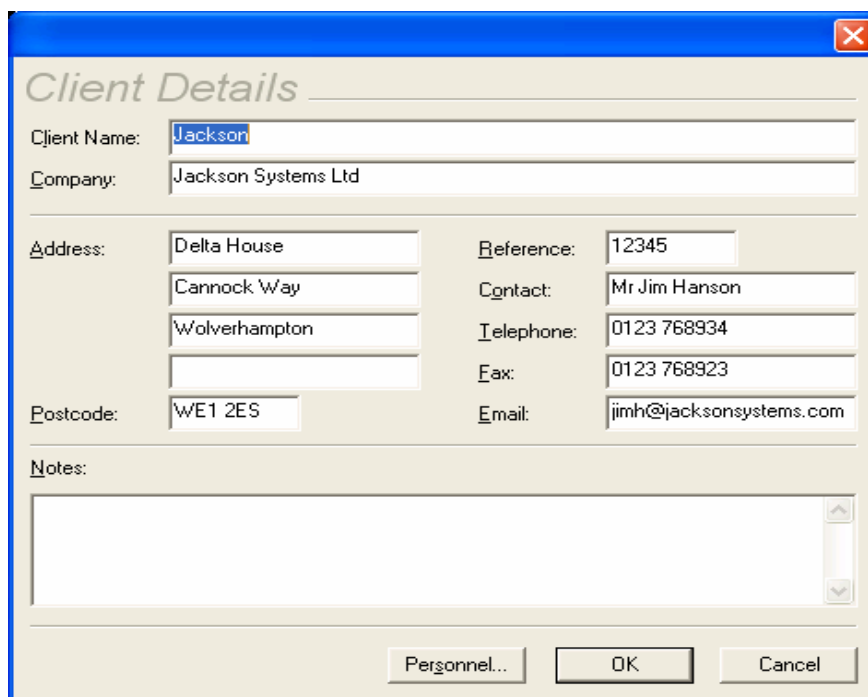


Figure 18: Client Details data entry form

A blank data entry form will be displayed to allow a new Client to be added to the currently open database, the **Client Name** is required for all new Clients and must be unique within the database all other fields such as Company Address etc are optional and may be updated at any time. Selecting the **Personnel** button will open an information only window to show Personnel who have been assigned to the Client. Personnel are assigned to Clients in the Personnel window (see Personnel).

Adding Sites

To add a Site record, either double click the **Add Site** icon or highlight the database or a Client 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.

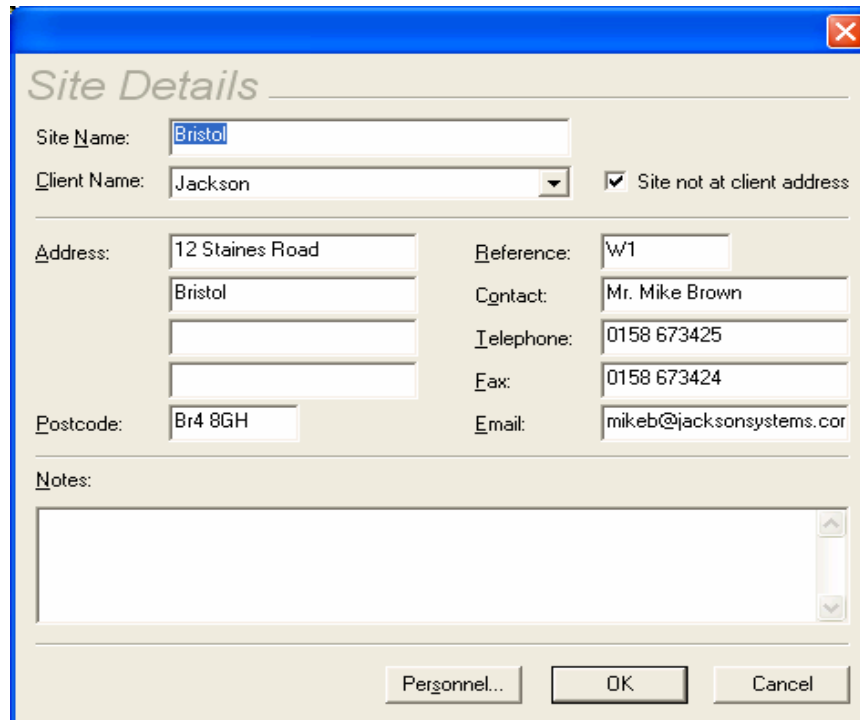
The image shows a 'Site Details' dialog box with a blue title bar and a close button. The form has a light beige background. At the top, the title 'Site Details' is in a large, italicized font. Below it, there are several input fields: 'Site Name' with 'Bristol' entered, 'Client Name' with a dropdown menu showing 'Jackson', and a checked checkbox labeled 'Site not at client address'. The 'Address' section has three stacked text boxes containing '12 Staines Road', 'Bristol', and an empty box. To the right, 'Reference' has 'W1', 'Contact' has 'Mr. Mike Brown', 'Telephone' has '0158 673425', 'Fax' has '0158 673424', and 'Email' has 'mikeb@jacksonsystems.com'. The 'Postcode' field contains 'Br4 8GH'. At the bottom, there is a 'Notes' section with a large text area. Three buttons are at the bottom right: 'Personnel...', 'OK', and 'Cancel'.

Figure 19: 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. If the Site has been added to a Client it can be assumed the Site address is as the Client address, if this is not the case by ticking **Site not at client address** a site address may be added.

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.

Location Details

Location Name: Sales Dept

Description:

Client Name: Jackson

Site Name: Bristol

Notes:

OK Cancel

Figure 20: 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.

Asset Details

Asset Id: JS01

Description: Answer Phone

Asset Group: < None >

Site Name: Bristol

Location Name: Sales Dept

Make: BT

Model: SL77

Serial No.: 566673

Test Code 1: I1C6003212

Test Code 2: S22211111

☒ In Service

Full Test

Test Period: User Defined 1 Years

Next Due: 17/11/2005

Program:

Visual Test

Test Period: User Defined 6 Months

Next Due: Overdue - 17/05/2005

Program:

Notes... Test Results... << >> OK Cancel

Figure 21: Asset Details entry form

Adding Test Sequences

Test Sequences can be added at a Client level only. To add a Test Sequence, either double click the **Add Test Sequence** icon or highlight the Client on the tree view and select **Add Test Sequence** from the context menu (right mouse button).

Output	Limit	Test Duration	No. of Tests
Socket: 230V	Skip	2s	1
Earth Bond: 100mAac	Skip	2s	1
Insulation: 500V d.c.	Skip	2s	1
Substitute Leakage:	Skip	2s	1
Flash:	Skip	2s	1
Leakage:	Skip	2s	1
Touch Leakage:	Skip	2s	1

☐ Include Visual Inspection
☐ Include Polarity Test

OK Cancel

Figure 22: Test Sequence entry form

Enter a Test Sequence **Name** and use the drop downs to set the parameters for the Test Sequence. To include a Visual Inspection or Polarity Test select the appropriate check boxes. Select **OK** to save the Test Sequence.

Test Sequences can also be created automatically from Assets. This can be done at the chosen Asset by selecting **Create Test Sequence..** from the Asset context menu (right mouse click). Provided the Asset Details contain a valid Test Code, the Test Sequence dialog box above will be displayed with all the correct settings from the Test Code, only the Name needs to be entered.

Test Sequences can also be created for all Assets below selected tree levels. This is done at the Client, Site or Location level by selecting **Create Test Sequences..** from the context menu (right mouse click) for the appropriate Client, Site or Location. The Test Sequence Names will equate to the Asset IDs. No duplicate Test Sequence names will be allowed and the program will only create unique Test Sequences.

Note

Create Test Sequences.. is only enabled if a Client exists for the Sites, Locations and Assets that are selected.

Drag and Drop Operations

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

- Sites may be dragged between Clients in the tree.
- 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.
- Sites may be dragged from the asset view to a Client 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.

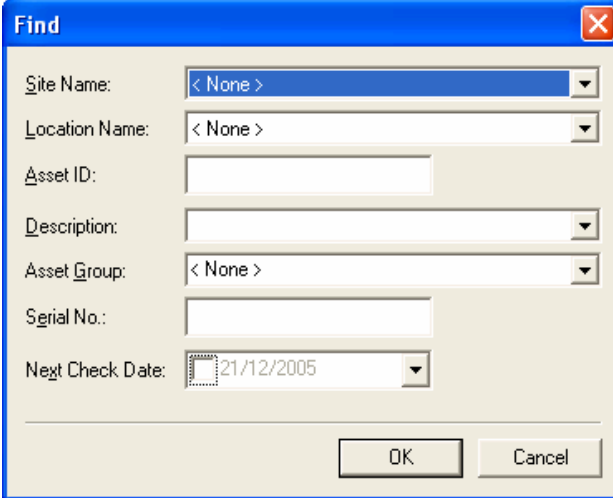
A screenshot of a 'Find' dialog box. The dialog has a blue title bar with the word 'Find' and a close button. Inside, there are several input fields: 'Site Name' with a dropdown menu showing '< None >', 'Location Name' with a dropdown menu showing '< None >', 'Asset ID' with a text box, 'Description' with a dropdown menu, 'Asset Group' with a dropdown menu showing '< None >', 'Serial No.' with a text box, and 'Next Check Date' with a date picker showing '21/12/2005'. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 23: 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.

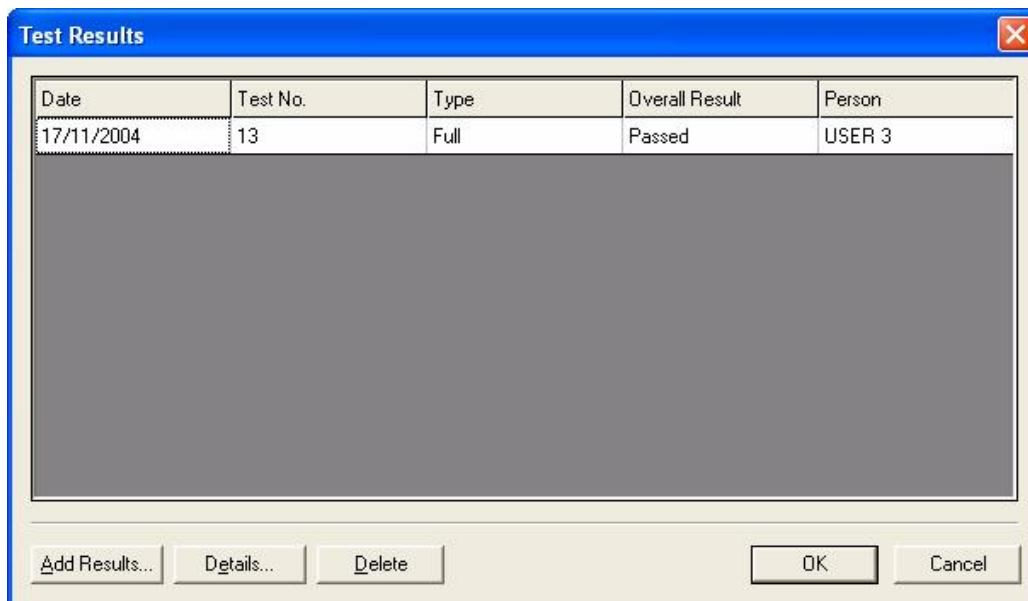
Tracking Assets

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.

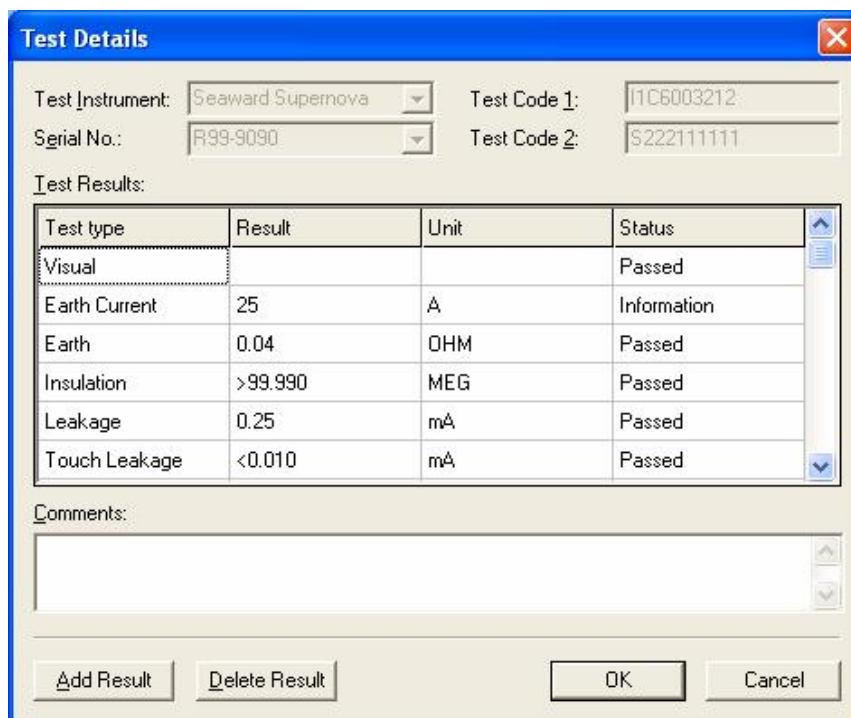


Date	Test No.	Type	Overall Result	Person
17/11/2004	13	Full	Passed	USER 3

Add Results... Details... Delete OK Cancel

Figure 24: 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.



Test Instrument: Seaward Supernova Test Code 1: I1C6003212
Serial No.: R99-9090 Test Code 2: S22211111

Test Results:

Test type	Result	Unit	Status
Visual			Passed
Earth Current	25	A	Information
Earth	0.04	OHM	Passed
Insulation	>99.990	MEG	Passed
Leakage	0.25	mA	Passed
Touch Leakage	<0.010	mA	Passed

Comments:

Add Result Delete Result OK Cancel

Figure 25: 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.

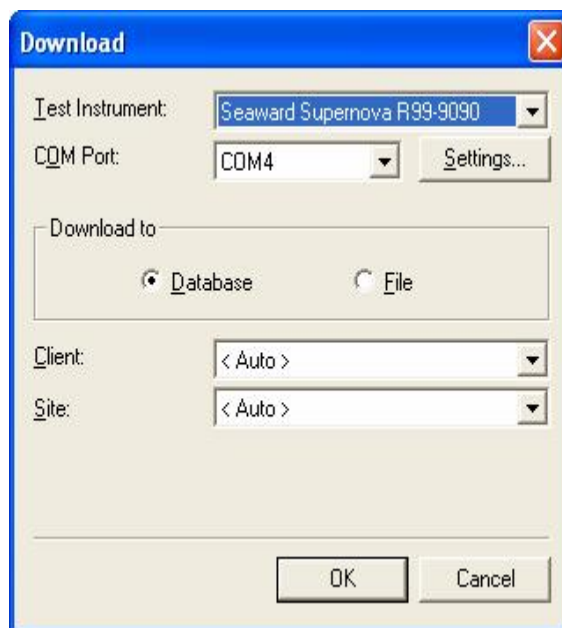


Figure 26: Download dialog box

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.

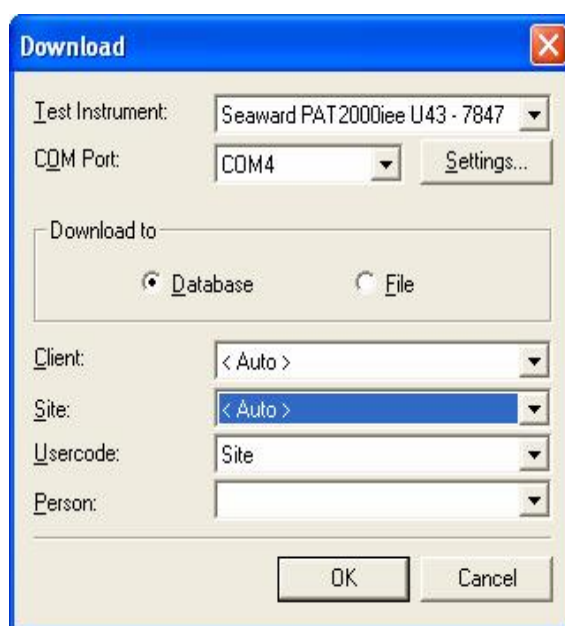


Figure 27: Download dialog box – additional fields

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 Elite can be opened in the program and the Test Results processed (see PATGuard Elite 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.

The **Client** drop down will enable Assets to be automatically moved between Sites for the selected Client, if the downloaded data indicates a Site re-location. The program will only allow this if Asset IDs are unique across all Sites for the selected Client. Leaving the Client set to <Auto> will not restrict the download to one Client but allow the downloaded data to be processed for the whole database (assuming Site is also set to <Auto>), these are the normal setting.

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 Elite 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.

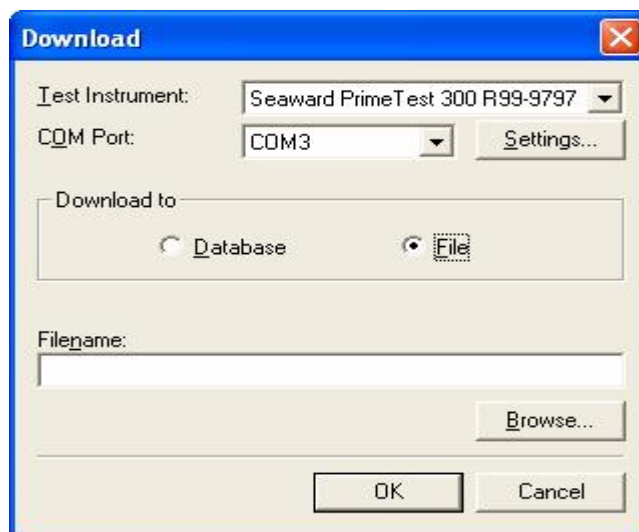


Figure 28: Download dialog box – File

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.

PATGuard e-Scheduler

PATGuard Elite has the ability to 'look ahead' to show Assets that need re-testing over any given period, including an inclusive period in the future. Test scheduling can be either Automatic or Manual. Automatic schedules are driven by PATGuard e-Scheduler.

Auto Scheduling

PATGuard Elite has the ability to run Schedules automatically. When a Schedule is triggered the program can create Local Schedules and Remote Schedules depending on Auto Scheduler settings. Local Schedules display Assets that require re-test on the main window of the program. Remote Schedules cause an emailed report to be sent to pre-set email addresses. Schedules are triggered even if PATGuard Elite is not running.

Auto Scheduling alerts users automatically when Assets require re-testing and allows users to manage Assets centrally no matter where they are located.

Auto Scheduler

The **Auto Scheduler** allows the user to set up Schedule trigger conditions for all levels of the PATGuard Elite tree structure. These levels are Client, Site and Location. The trigger conditions are monitored by PATGuard e-Manager when the database is free i.e. not open in PATGuard Elite. Should a trigger be activated then PATGuard e-Manager will automatically issue a Local and/or Remote Schedule.

To set an Auto Schedule, select the appropriate Client, Site or Location then right mouse click to display the context menu. Select **Auto Scheduler...**

The following window is displayed when launched from the highest level Clients or Sites

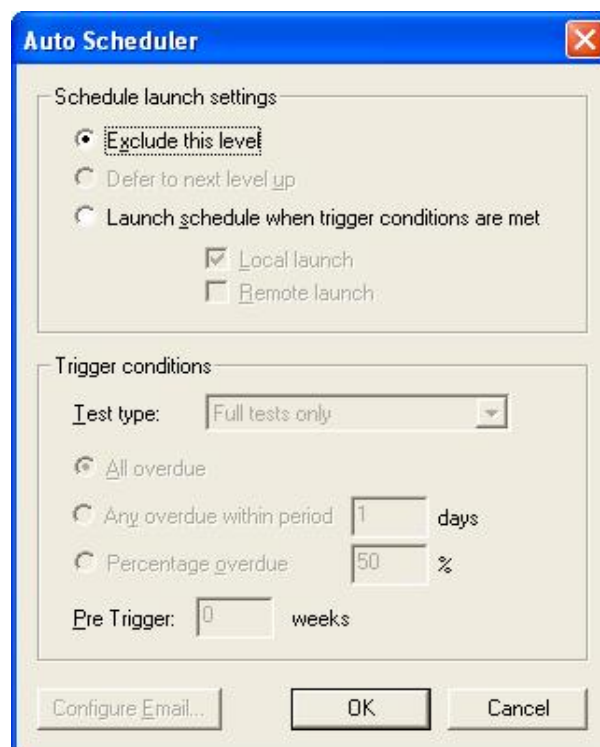


Figure 29: Top level Auto Scheduler window

For lower levels like Sites or Locations the following Window is displayed.

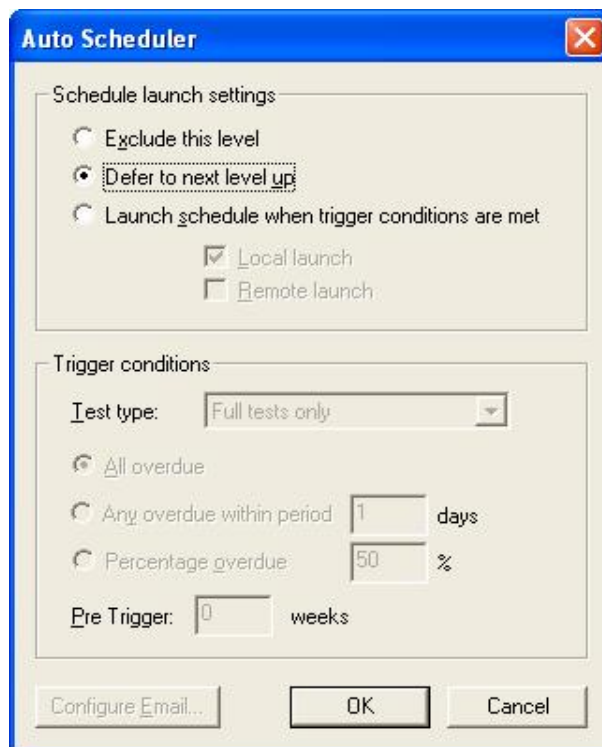


Figure 30: Lower level Auto Scheduler window

These windows show the default settings i.e. no Auto Schedules set. All levels up to the highest level are deferred up. The highest level be it Client or Site is not active i.e. Excluded.

The **Auto Scheduler** dialog box is divided into two sections; **Schedule Launch Settings** and **Trigger Conditions**

Schedule Launch Settings

Three radio button options are available. These allow the user to enable or disable the **Auto Scheduler** at the selected level or defer to the next level up.

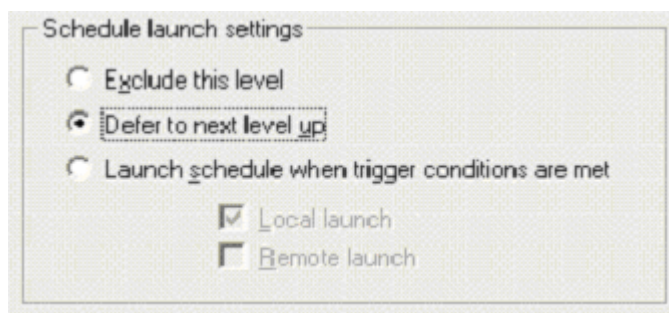


Figure 31: Schedule launch settings dialog box

Exclude this level will disable the Auto Scheduler at this level and exclude this level from higher level Auto Schedules.

Defer to next level up enables this level to be included in the trigger conditions of the next level up.

Launch schedule when trigger conditions are met will enable the trigger actions set in the **Trigger Conditions** below. This selection will enable the **Local launch** and **Remote launch** check boxes.

If an Auto Schedule is enabled within another Auto Schedule then its level (Site or Location) will be excluded from influencing the high level's Auto Schedule trigger conditions.

Local launch

If this is set and an Auto Schedule is triggered then the Auto Schedule can be displayed on the main screen of PATGuard Elite. The user will be given the option to display an Auto Schedule when opening a PATGuard Elite database for the first time after a schedule has been triggered. To switch off the **Local Launch** display select Auto Schedule from the **View** drop down then un-tick **Display**.

Local launches are cumulative and dynamic in that the **Local launch** can include a number of Auto Schedules that have triggered and as individual Auto Schedules are suspended or reset the **Local launch** will change, but it will always show the current situation.

At any time, current triggered schedules can be displayed, printed or uploaded by selecting **Auto Schedule** from the **View** drop down and then choose the appropriate command; **Display**, **Print** or **Upload**. **Upload** has a further menu; **Full** or **Visual** these will only be enabled if a one or more Full or Visual Auto Schedule has triggered within the database. Select either option to Upload.

Note

For Upload of Assets across Sites all Asset Ids need to be unique. If this is not the case Upload will not be enabled.

Remote launch

If this is set and an Auto Schedule is triggered then the program will automatically send an email. When the **Remote launch** check box is set the **Configure Email** button at the bottom of the dialog box will become active. Email details must be configured if the Remote check box is set.

Trigger Conditions

These options will determine the conditions which will cause a schedule to trigger.

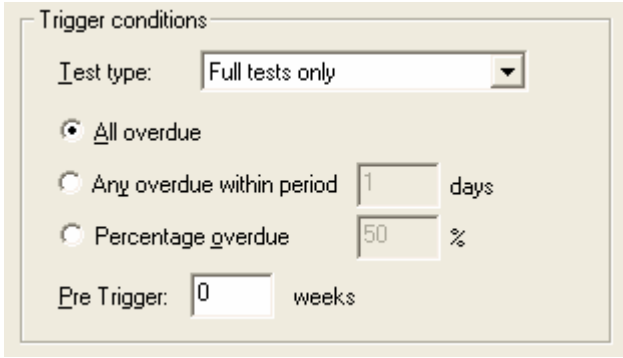
The image shows a 'Trigger conditions' dialog box. It has a title bar 'Trigger conditions'. Inside, there is a 'Test type:' label followed by a dropdown menu currently showing 'Full tests only'. Below this are three radio button options: 'All overdue' (which is selected), 'Any overdue within period', and 'Percentage overdue'. The 'Any overdue within period' option has a text input field with '1' and the label 'days'. The 'Percentage overdue' option has a text input field with '50' and the label '%'. At the bottom, there is a 'Pre Trigger:' label followed by a text input field with '0' and the label 'weeks'.

Figure 32: Trigger conditions dialog box

Use the **Test type** drop down to select **Full tests only** or **Visual tests only**.

The three radio buttons are mutually exclusive and determine the number of Assets that become overdue to initiate the trigger. **All overdue** and **Any overdue within period** refer to all Assets at or below this level (unless a lower level is excluded in which case its Assets will not be included).

Any overdue within Period enables a period to be projected ahead for the **Any overdue** setting. The default is 1Day. This means that all currently overdue Assets will be included in the Schedule. Other Period settings up to 60 days will include Assets that are not yet overdue but will be overdue in the Period to be included in the Schedule.

Selecting **Percentage overdue** will enable the percentage value to be entered giving the user better control over the trigger condition.

Pre Trigger enables a number of **weeks** to be set so that there is advanced warning by triggering the schedule before Assets are overdue.

Once a schedule as been triggered, subsequent new trigger conditions will cause further Local and Remote launches of new schedules (updated). These will be suspended if a schedule **Upload** is activated (see **Local launch** above). Auto Schedules are re-started once all the Assets for the schedule are no longer Overdue.

Configure Email

Selecting **Configure Email** from the **Auto Scheduler** window will display the following window.

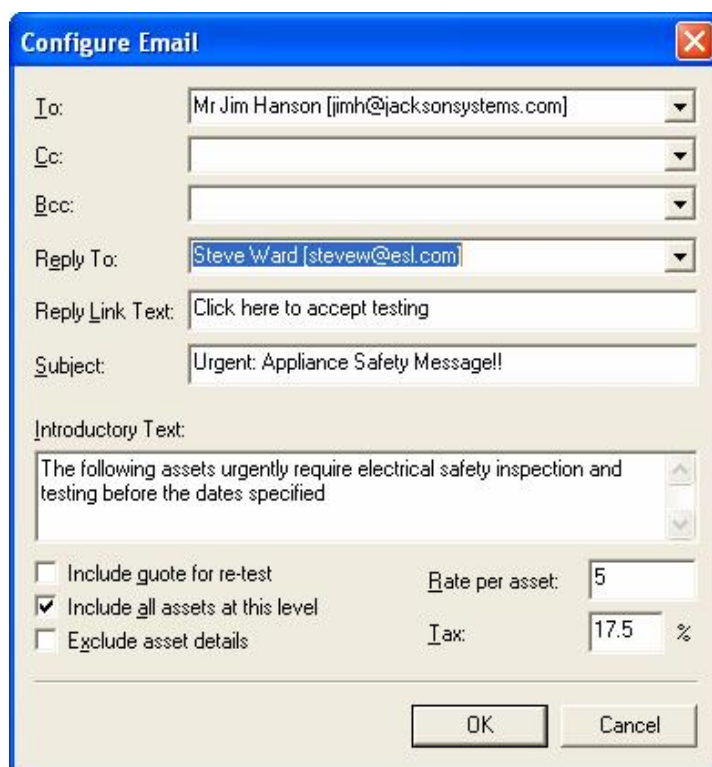


Figure 33: Configure Email window

This **Configure Email** window is used to set email addresses and content for the **Remote schedule** launch of the previous Auto Schedule.

The address fields allow free flow input or addresses can be dropped in using the drop down. Email addresses available in the drop downs are context related. That is they contain addresses for Personnel assigned to the selected Client, Site or Location (see the Personnel Section in the PATGuard Elite User Manual). The **Reply To** email address is the address that the recipient will send to when using the Auto Reply feature of the received email.

The **Reply Link Text** enables the user to customise the text that the recipient of the email will click on to reply.

The **Subject** field is the standard email subject field and can be customised by the user.

The **Introductory Text** field is a text pre-amble to the report and can be customised by the user.

The three check boxes; **Include quote for re-test**, **Include all assets at this level** and **Exclude asset details** give the user more choice over the email report format. When a quote is to be included **Rate per asset** and **Tax** values need to be entered.

Once the email has been configured, select OK to save the configuration for the selected Auto Schedule.

e-Manager

e-Manager is a small tray application program installed by PATGuard e-Scheduler. This program manages PATGuard e-Scheduler by monitoring PATGuard Elite databases for schedule trigger actions and then launching Local and Remote Schedules.

Note

Tray applications are monitor type programs that run from boot up of the computer and remain running all the time the computer is being used. These programs appear as an icon in the Windows tray. This is normally in the bottom right hand corner of the Windows applications bar.

To use the PATGuard e-Manager, position the mouse over the icon to display the following program menu.

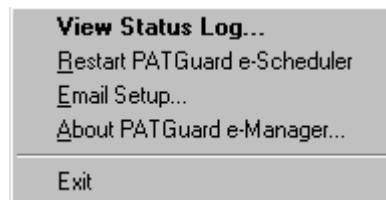


Figure 34: PATGuard e-Manager menu

Selecting **Exit** will close the PATGuard e-Manager program. This will not affect PATGuard Elite but will stop all database monitoring for schedule trigger actions and subsequent Local and Remote launches. The computer will require to be booted up to re-start PATGuard e-Manager again.

Note

New Auto Schedules set while PATGuard e-Manager is closed will not be registered with PATGuard e-Manager. To register open the appropriate database while PATGuard e-Manager is running. Should any trigger actions happen while PATGuard e-Manager is closed, they will be detected and acted upon when PATGuard e-Manager re-starts. No Auto Schedules can be lost other than by direct user action.

Other menu options are described below.

View Status Log

Selecting **View Status Log...** will open the following window.

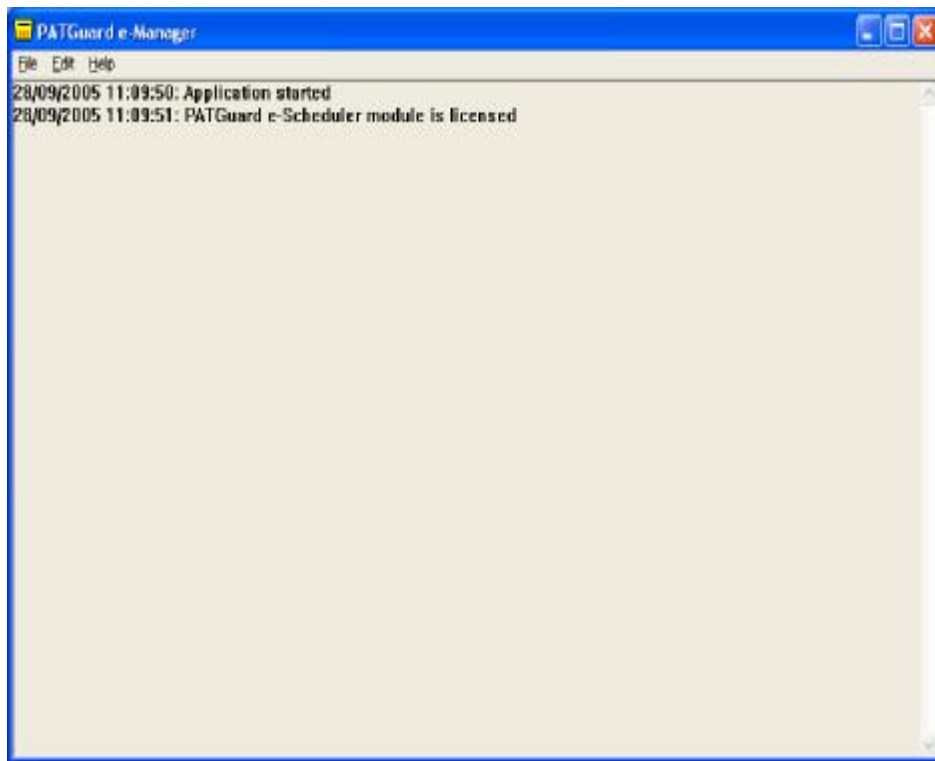


Figure 35: PATGuard e-Manager Status Log window

Note

The contents of the Log will vary as it is a real-time display of events

The Status Log displays all events and user messages for PATGuard e-Manager. The Log screen can be cleared of all earlier information by selecting **Erase** from the **Edit** drop down. The Log will automatically re-set when the computer is booted up.

Restart PATGuard e-Scheduler

This action will cause PATGuard e-Scheduler to restart just as it would from boot up of the computer. PATGuard e-Scheduler will then check all databases that have Auto Schedules set for trigger actions. Should it find any it will launch Local and Remote Schedules.

This command is also available from **File** drop down of the Status Log.

Email Setup

To allow for different email systems, **Email Setup** will enable the user to set the appropriate values to match the computer's email. This command is also available from **File** drop down of the Status Log.

Select **Email Setup** from the PATGuard e-Manager menu to display the following dialog box.

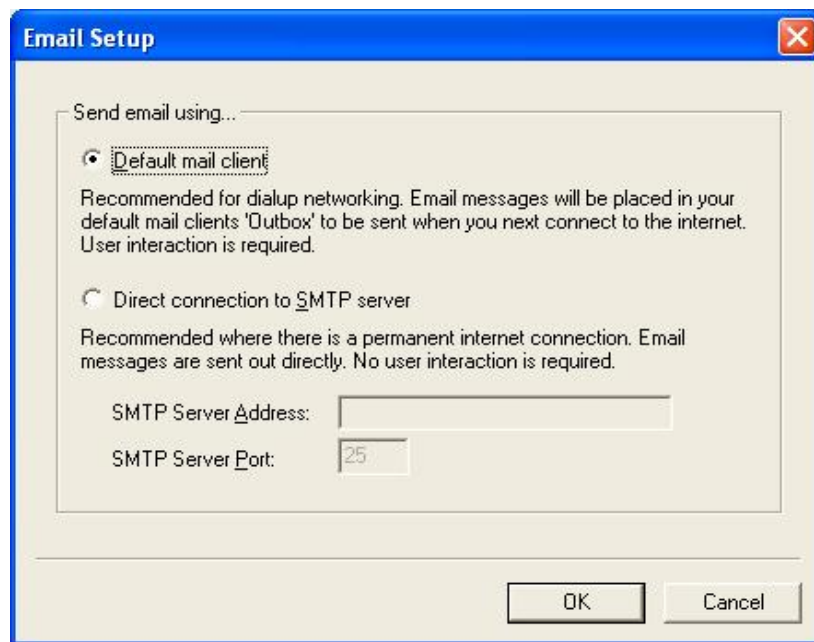


Figure 36: Email Setup dialog box

Select the appropriate option and for SMTP servers set the address and port. Select **OK** to save the settings.

Manual Schedules

To display a Test Schedule not generated by the Auto Scheduler, 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.

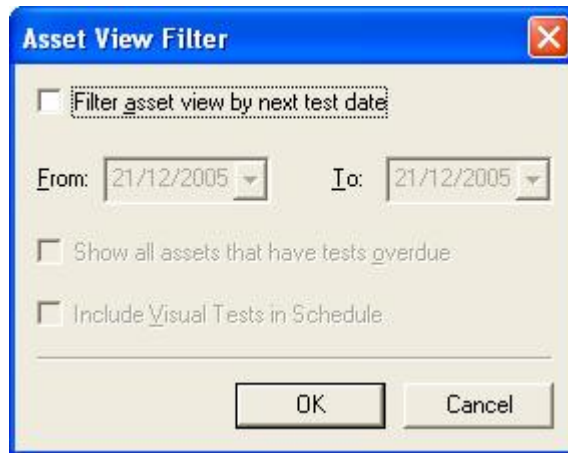


Figure 37: Asset View Filter

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.

Upload

Some Seaward PAT testers (see Software Specification for which models) have facilities for Uploading Assets into the PAT tester memory or file. This is an Asset Upload.

Asset Upload files (xpg) can also be created for use with PATGuard Work About software which is a PATGuard record system for use on Pocket PCs or Windows Mobile devices.

In addition to an Asset Upload, Supernova Plus and Europa Plus testers can also Upload Sites, Locations and Test Sequences. While PrimeTest 300, in addition to Asset Upload can also Upload Sites and Locations.

Upload Sites

This can only be launched from the Client or Site context menu (right mouse click). After selecting the Client, select **Upload Sites...** to Upload all Sites below the Client level.

Note

Upload Sites... will not be enabled if there are more than 19 Sites below the Client level as this is the maximum available in the tester. Use individual selection to select less than the maximum to enable the Upload Sites... command.

Individual selection of Sites to be Uploaded is possible by holding the Ctrl key down while selecting a group of Sites in the Asset view (not the tree). Providing the number selected is 19 or less then the **Upload Sites...** command will be available from the Site context menu. Any number of Sites can be Uploaded from 1 to 19.

Note

This feature is only available with Supernova Plus, Europa Plus and PrimeTest 300 testers.

Upload Locations

This can be launched from the Site or Location context menus (right mouse click). After selecting the Site, select **Upload Locations...** to Upload all Locations below the Site level.

Note

Upload Locations... will not be enabled if there are more than 49 Locations below the selected level as this is the maximum available in the tester. Use individual selection to select less than the maximum to enable the Upload Locations... command.

Individual selection of Locations to be Uploaded is possible by holding the Ctrl key down while selecting a group of Locations in the Asset view (not the tree). Providing the number selected is 49 or less then the **Upload Locations...** command will be available from the Location context menu. Any number of Locations can be Uploaded from 1 to 49.

Note

This feature is only available with Supernova Plus, Europa Plus and PrimeTest 300 testers.

Upload Assets

This can be launched from the Site, Location and Asset context menus (right mouse click). After selecting the appropriate Site or Location, select **Upload Assets...** to Upload all Assets below the selected level.

Individual selection of Assets to be Uploaded is possible by holding the Ctrl key down while selecting a group of Assets. Then from the Asset context menu, select **Upload Assets...**

For Asset Uploads to Supernova Plus and Europa Plus, in addition to the Asset ID and Testcode, the Site, Location and Re-Test Period are also included with each Asset. For PrimeTest 300 the Test Program is sent instead of the Testcode, if available, otherwise the Testcode will be converted into a Test Program for Upload.

A **Visual only** check box can be checked if the Upload is to contain only Visual tests. For Full test uploads leave the check box unchecked.

Note

Assets can only be uploaded if they have a Testcode or Test Program. The program will convert the format depending on the tester selected if its correct format is not available. If this is the case, due to differences in the tester specifications there may be some compromise when the format is converted. This is also true for PATGuard Work About Upload from Upload files (xpg).

Upload Test Sequences

This can only be launched from the Client context menu (right mouse click). After selecting the Client, select **Upload Test Sequences...** to Upload all Test Sequences below the Client level.

Note

Upload Test Sequences... will not be enabled if there are more than 20 Test Sequences below the Client level as this is the maximum available in the tester. Use individual selection to select less than the maximum to enable the Upload Test Sequences... command.

Individual selection of Test Sequences to be Uploaded is possible by holding the Ctrl key down while selecting a group of Test Sequences in the Asset view (not the tree). Providing the number selected is 20 or less then the **Upload Test Sequences...** command will be available from the Test Sequence context menu. Any number of Test Sequences can be Uploaded from 1 to 20.

Note

This feature is only available with Supernova Plus and Europa Plus testers.

Uploading

To Upload a PAT tester (not all PAT testers have an Upload facility, see Software Specification) connect the PAT tester to the PC according to the PAT requirement.

Select the appropriate Upload action (see above).

Note

Multiple selection is only available in the Asset display area (see Navigating PATGuard Elite).



Figure 38: Upload dialog box

The **Destination** of **PDA** is to enable Upload files (xpg) to be created for use with PATGuard Work About program.

For Uploading direct to a tester; select the appropriate **Destination** and the **COM Port** from the drop downs, then select **OK** to commence the Upload action.

Note

Only testers on the Test Instrument tab that can carry out the selected upload action will be available from the Destination drop down

The program will request that the PAT tester is put into an Upload mode (see the tester User Manual on how to do this). The Upload will commence after the tester is put into this mode and acknowledged.

Note

If a Password is set for the PAT tester (Supernova Plus and Europa Plus only) when a Test Sequence Upload is attempted, PATGuard Elite will request the Tester Password before the Upload can proceed.

PATGuard Elite Files

Pat Files

PATGuard 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 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.

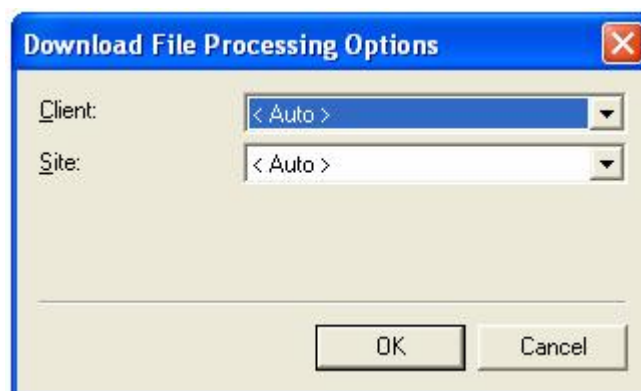


Figure 39: Download File Open – sss type

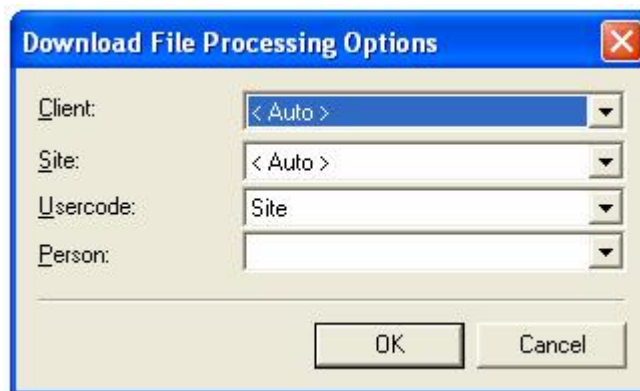


Figure 40: Download File Open – txt type

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

The **Client** drop down will enable Assets to be automatically moved between Sites for the selected Client, if the downloaded data indicates a Site re-location. The program will only allow this if Asset IDs are unique across all Sites for the selected Client. Leaving the Client set to <Auto> will not restrict the download to one Client but allow the downloaded data to be processed for the whole database (assuming Site is also set to <Auto>), these are the normal setting.

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 Elite 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.

Creating a PATGuard Viewer CD

PATGuard Viewer is a 'view' only version of the program that can be freely issued to Clients and others so that they can view the database in real-time and print their own Reports.

This feature enables a customised Viewer CD to be created very easily. A Viewer CD can be created at the database level in which case the entire database will be available to the PATGuard Viewer user or for an individual Client within a database in which case only the data for that Client will be available to the PATGuard Viewer user.

To launch the **Create Viewer CD Image** dialog box, select the root of the database tree at the upper left side of the Main Window or select an individual Client, then right mouse click to display the context menu. Select **Create Viewer CD Image** and the following windows will be displayed:

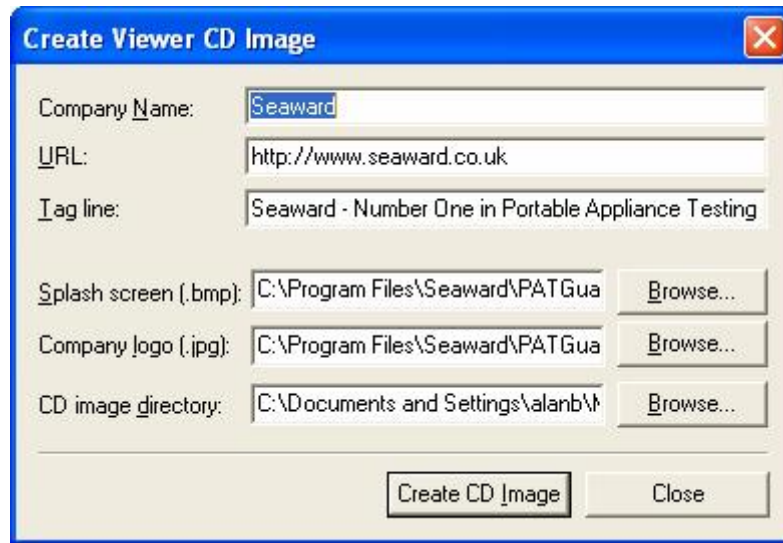


Figure 41: Create Viewer CD Image dialog box

The Viewer CD image consists of a number of files created and stored in the CD image directory. The PATGuard Viewer CD will be created when these files are 'burned' into a new CD.

To create the Viewer CD image fill out all the fields in the Create Viewer CD Image dialog box (or accept defaults).

Company Name

This is your company name. This name will appear during the PATGuard Viewer CD installation and will precede the program name for all short cut icons.

URL

This is your web site address and will appear during installation.

Tag Line

This is a slogan which is displayed during installation.

Splash Screen

This field is a path to a bitmap file which appears when the PATGuard Viewer is started and replaces the Login screen.

Company Logo

This field is a path to a jpeg file which is your company logo and will appear on all PATGuard Viewer Reports.

CD Image Directory

This field is the path and directory name where the CD image files will be stored.

Once all the fields are set appropriately, select **Create CD Image** to generate the CD image files. Then copy all the files generated to a new CD.

Note

Do not copy the directory but copy all the files in the directory to ensure that all the files are directly on the CD and not within a directory. It is a good idea to check the CD is correct by installing on your own PC. Installation of the PATGuard Viewer will not affect PATGuard Elite.

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 Elite 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:

Asset Barcoded Labels

This Report will print a series of barcode labels of the Asset Id for selected Assets.

Barcode List

This Report will print a series of barcodes depending on the Report Type selected. Options are Asset Id, Asset Description, Make or Model. This Report will only print unique values. The printed sheets created can be used for fast entry of information into the Comment field of Seaward testers by scanning barcodes.

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.

Barcoded Task Checklist

This Report consists of Asset Id barcoded, Test dates and Testcode barcoded for selected Assets in Locations at selected Sites.

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.

Test Instrument Details

This Report will contain details of Test Instruments registered in the database including calibration dates.

List Charges

This Report will list totalised charges for tests carried out. Data selection includes Charge Type and Test Status. Cost of Test and Purchase Tax can be set prior to running the Report

Client Details

This Report consists of details of Clients within the database.

Personnel Details

This Report consists of details of Personnel registered with the program.

Short Code Details

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

Site Details

This Report consists of details of Sites registered with the program.

Test Sequence Details

This Report consists of details of Test Sequences

Utility Software

The PATGuard Elite 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 Elite group (from where the PATGuard Elite program can be launched).

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

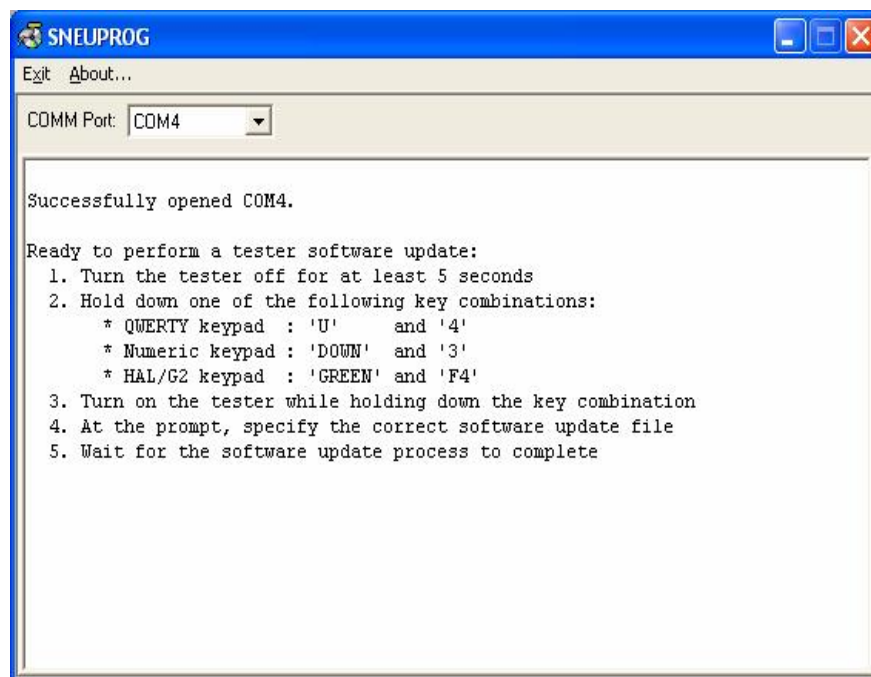


Figure 42: Tester update dialog box

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

Note

QWERTY keypad refers to Seaward Supernova Elite, Supernova XE, Supernova, Europa Elite 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:

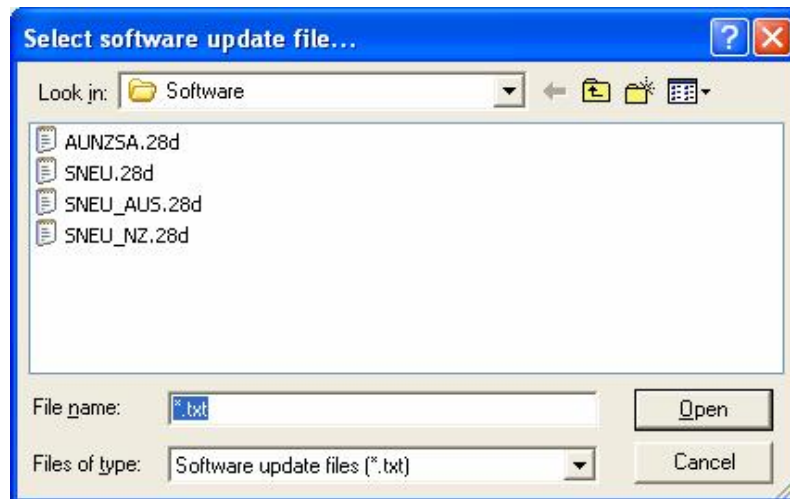


Figure 43: Select software update file dialog box

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:

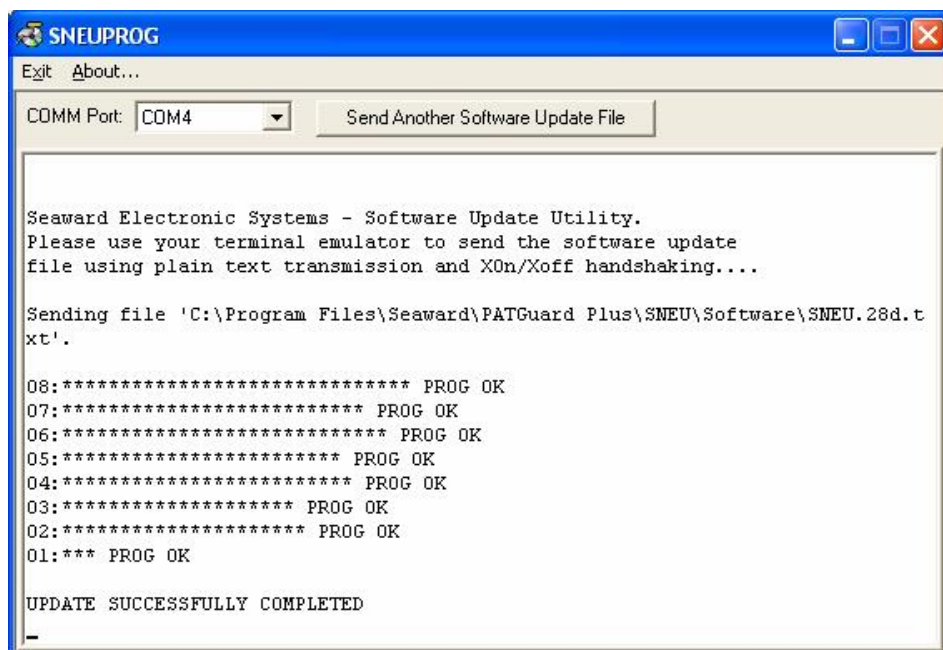


Figure 44: Update successfully completed

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 Elite Help
Seaward PATGuard Elite User Manual
Seaward PATGuard Elite
Uninstall PATGuard Elite
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		

The program can Upload to the following PAT testers:

IT1000
PAT2000i
PAT2000iee
Europa
Europa Plus
Europa XE
Europa XE Plus
PrimeTest 300
Supernova
Supernova Plus
Supernova XE
Supernova XE Plus
Ethos 9500
Ethos 9600
Emona Maestro

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 Elite Licenses	Part Number	352A914
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PATGuard Time Manager software	Part Number	334A910
PATGuard Work About software	Part Number	336A910

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.

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