

PATGuard 3

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Welcome

Welcome

PATGUARD 3

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

PATGuard 3 is compatible with a wide range of portable appliance testers, including the [Seaward Apollo 600](#) safety management tool. For a full list of compatibility refer to the [Tester Compatibility](#) page.

About PATGuard

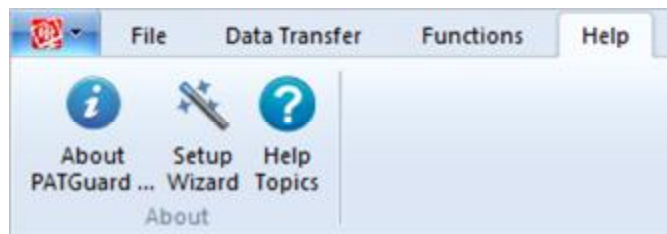
For more information about PATGuard 3, refer to [About PATGuard 3](#) page.

How to use the Help file

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

Accessing the Help file

The Help files can be accessed by selecting **Help Topics** from the [Help Menu](#).



Help Topics - Help Menu

Context-sensitive help

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

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

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

Getting Started

For help on getting started, including [Installing](#) and [Activating](#) PATGuard 3 and [Setting up a Database](#), please refer to the [Getting Started](#) section. For help in navigating around the user interface, please refer to the [Navigating PATGuard 3](#) section.

Setup Wizard

PATGuard 3 contains a Setup Wizard to help you get up and running. For more information, refer to the [Setup Wizard](#) page.

About PATGuard 3

About PATGuard 3

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

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

A Risk-Based Approach

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

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

Complete Health and Safety Management

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

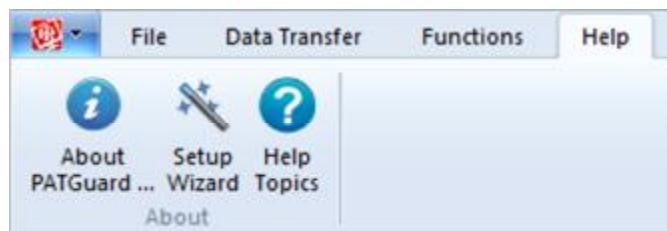
Compatible with Apollo 600

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

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

About Screen

To view the About Screen, select the **About PATGuard** option from the the [Help Menu](#).



About PATGuard - Help Menu

The About Screen displays the [version](#) and [revision](#) of PATGuard 3 that you are using, along with the [Licence Agreement](#).



About Screen

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

What's New & Revision History

What's New

PATGuard 3 has been completely updated to include:

- A built in universal risk assessment tool
- Ability to determine retest periods using electrical risk assessment tool
- Ability to create and print a range of health & safety certificates
- Compatibility with the [Apollo 600](#) safety management tool

Future updates are free to existing registered PATGuard 3 subscribers.

Revision History

To see which revision of PATGuard 3 you are currently running, refer to the [About Screen](#).

Version 3.0

Version 3.0 is the initial release version of PATGuard 3.

PATGuard 3 Versions

PATGuard 3 Versions

PATGuard 3 is available in two different versions, Elite and Elements. The version you are currently running can be found on the [About Screen](#).

The features of the different versions are as follows:

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

PATGuard 3 Versions

Tester Compatibility

 **Tester Compatibility**

Download Compatibility

PATGuard 3 (Elite and Lite [Versions](#) only) can [download data](#) from the following testers:

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



* Requires download through the Parallel Port via a Parallel to Serial Adaptor, not available from Seaward. Contact Avo for download cable and adaptor requirements.

Upload Compatibility

PATGuard 3 (Elite [Version](#) only) can [upload data](#) to the following testers:

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

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

Getting Started

Getting Started

Once you have reviewed the [Licence Agreement](#) and are ready to install PATGuard 3, follow the steps below to get started:

Installing PATGuard 3

- [Installing on a standalone PC](#)
- [Installing on a network Server](#)
- [Installing on a network Workstation](#)

Activating PATGuard 3

- [Activate Online](#)
- [Activate by Phone, Email or Fax](#)
- [Evaluation Period](#)

Setup Wizard

- [Setting up a Database](#)
 - [Create a new database](#)
 - [Select an existing database](#)
 - [Import a legacy database](#)
- [Setup Options](#)
 - [Company Details](#)
 - [User Accounts](#)
 - [PAT Options](#)
 - § [Code Abbreviations](#)

- [Asset Groups](#)

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

If you encounter problems getting started with PATGuard 3, please refer to the [Support](#) page.

Installing PATGuard 3

Installing PATGuard 3

Once you have reviewed the [Licence Agreement](#) and are ready to install PATGuard 3, select an option from below to learn more about installing PATGuard 3 on your system:

Installing PATGuard 3

- [Installing on a standalone PC](#)
 - [Installing on a PC without internet access](#)
- [Installing on a network Server](#)
- [Installing on a network Workstation](#)

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

If you encounter problems installing PATGuard 3, please refer to the [Support](#) page.

Installing on a standalone PC

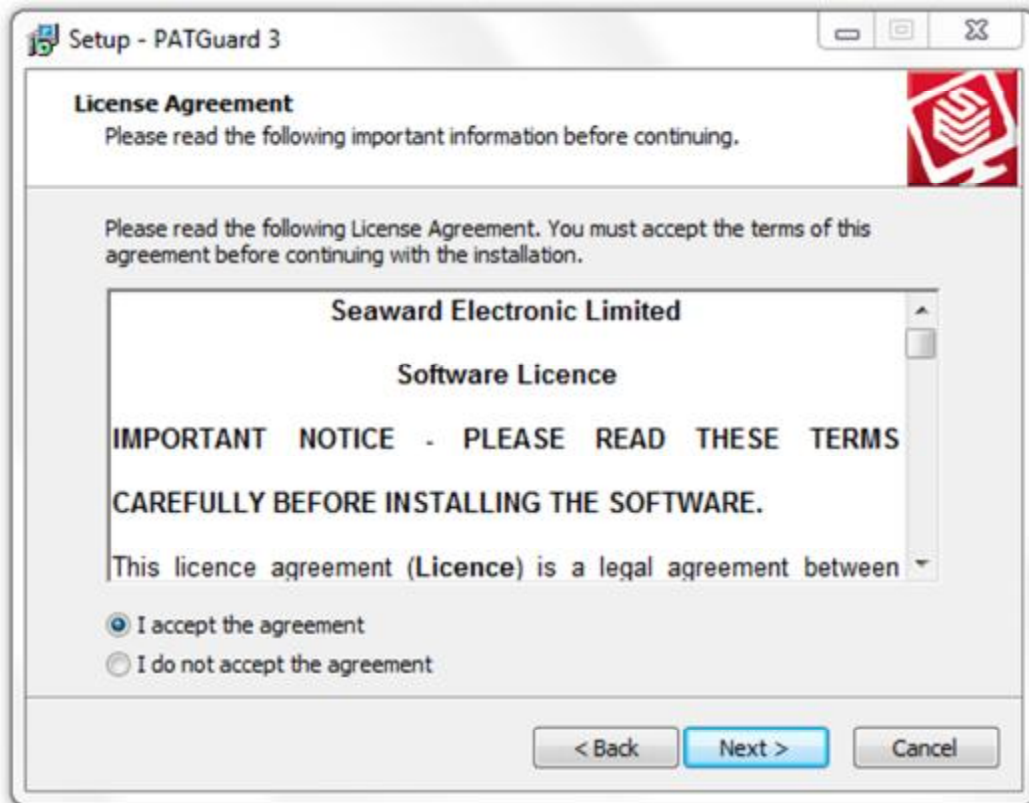
Installing on a standalone PC

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



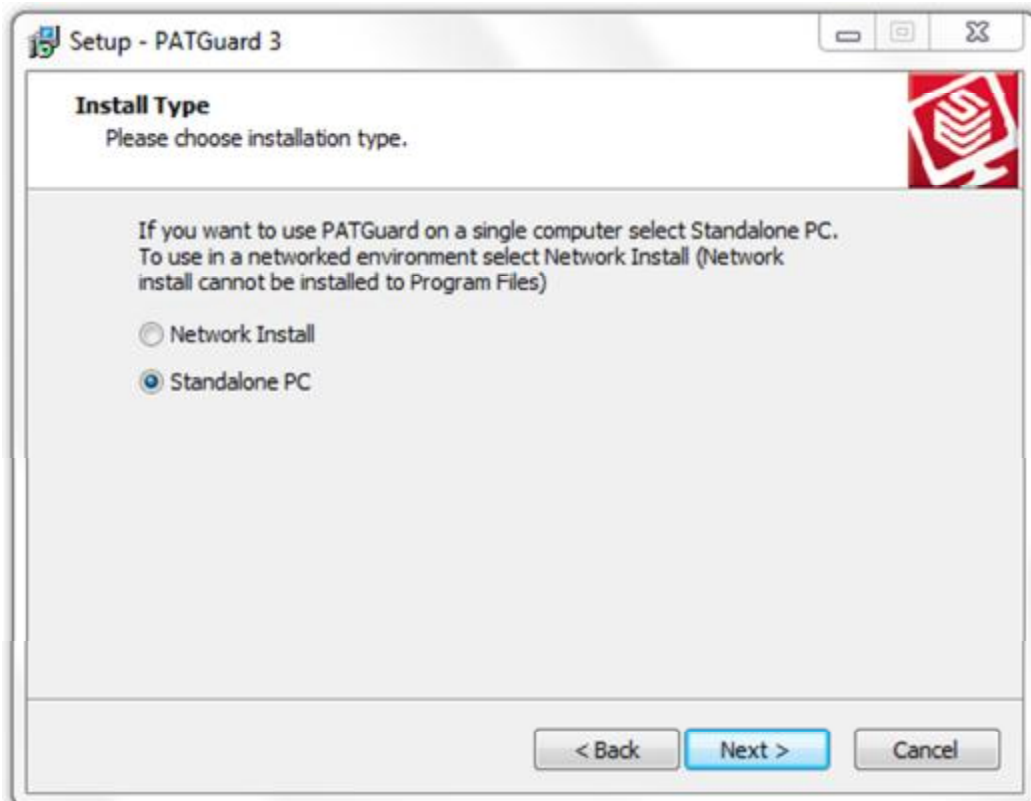
Installation Screen 1

Review the [Licence Agreement](#) and click **Next >** to continue.



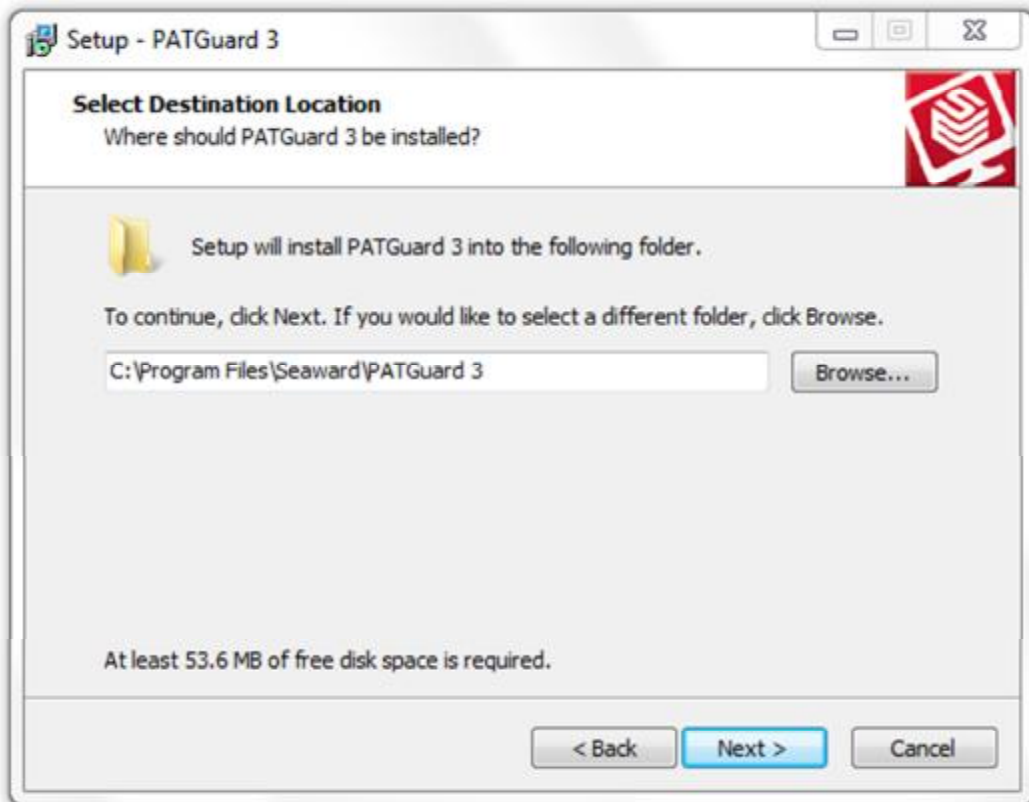
Installation Screen 2

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



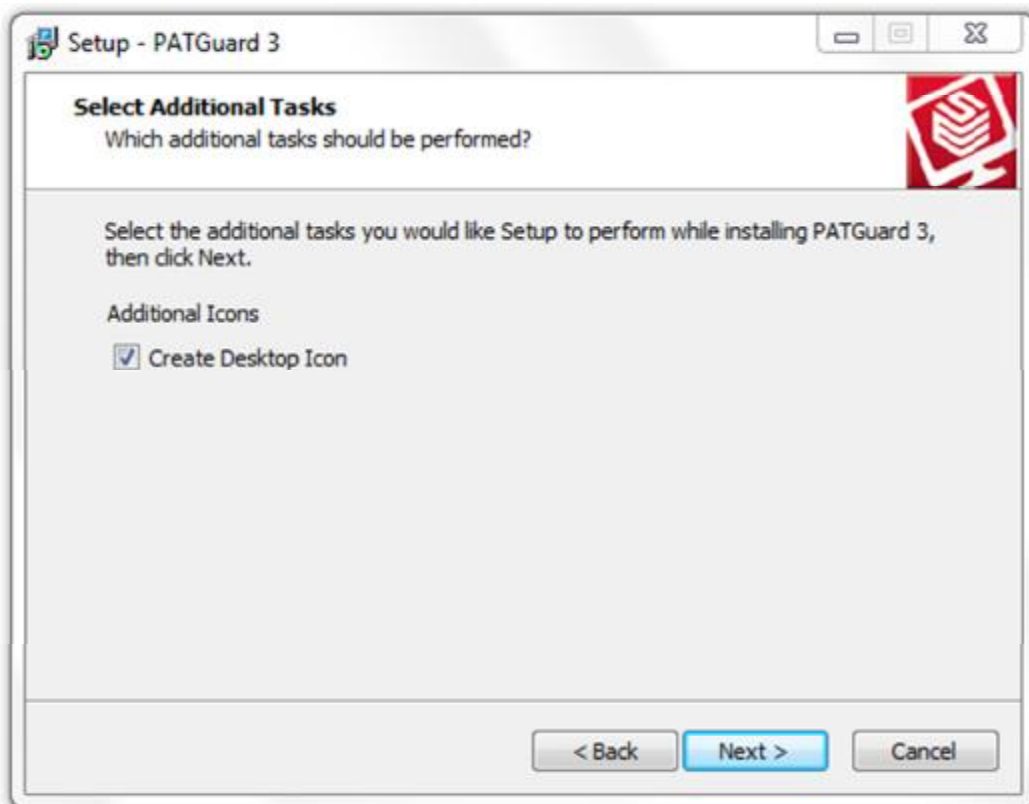
Installation Screen 3

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



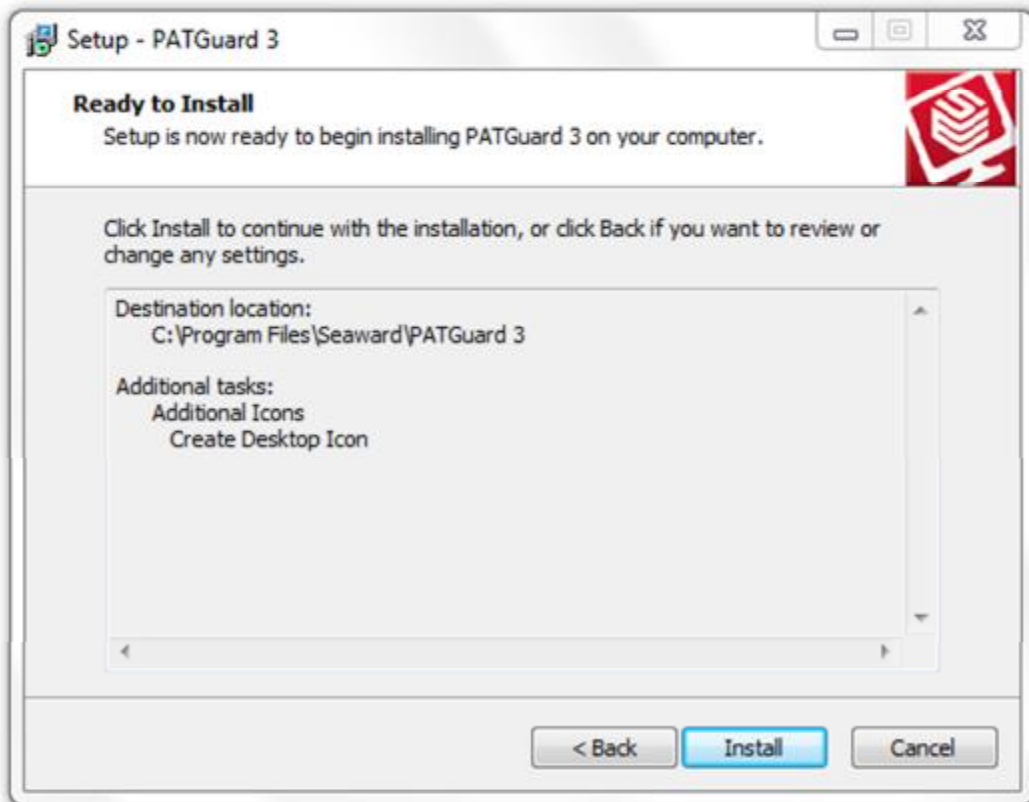
Installation Screen 4

Click **Next >** to continue.



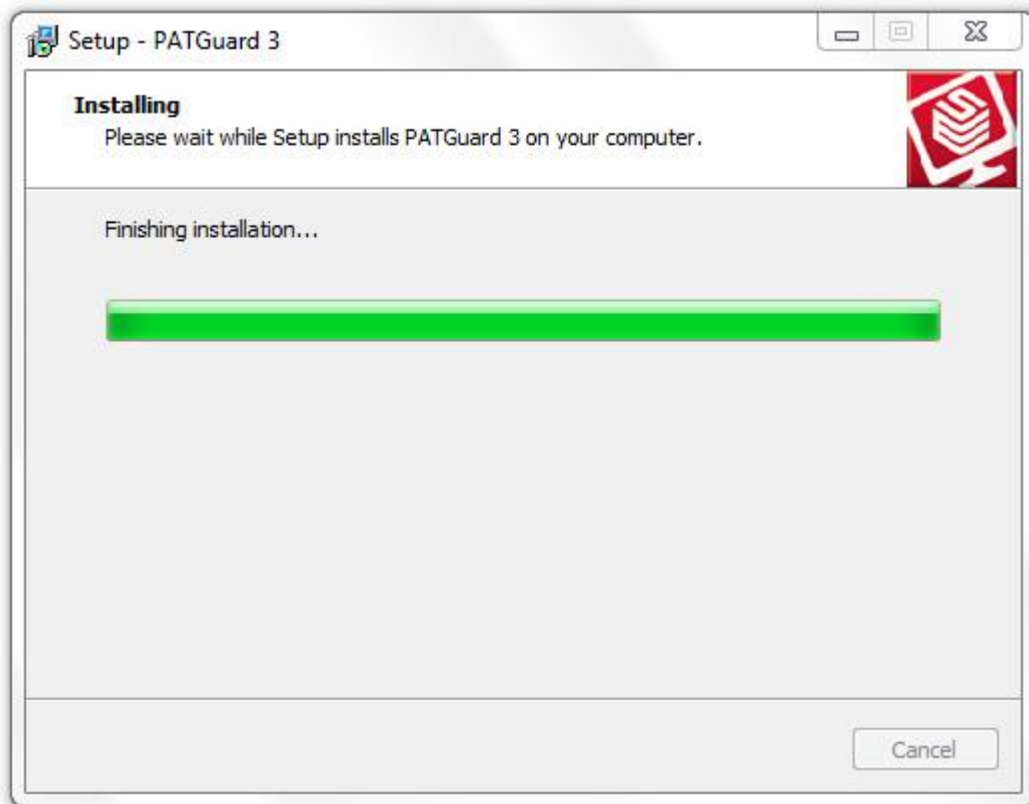
Installation Screen 5

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



Installation Screen 6

You will be shown the progress of the installation.



Installation Screen 7

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



Installation Screen 8

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

Installing on a PC without internet access

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

If you encounter problems installing PATGuard 3, please refer to the [Support](#) page.

Installing on a network Server

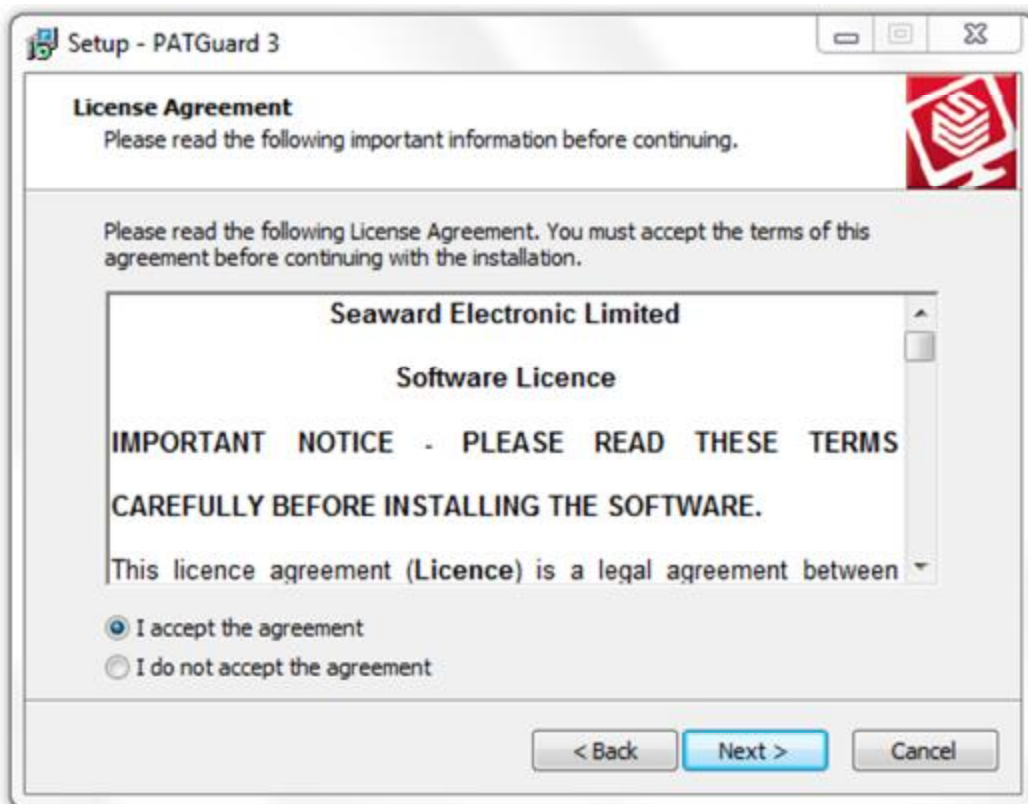
Installing on a network Server

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



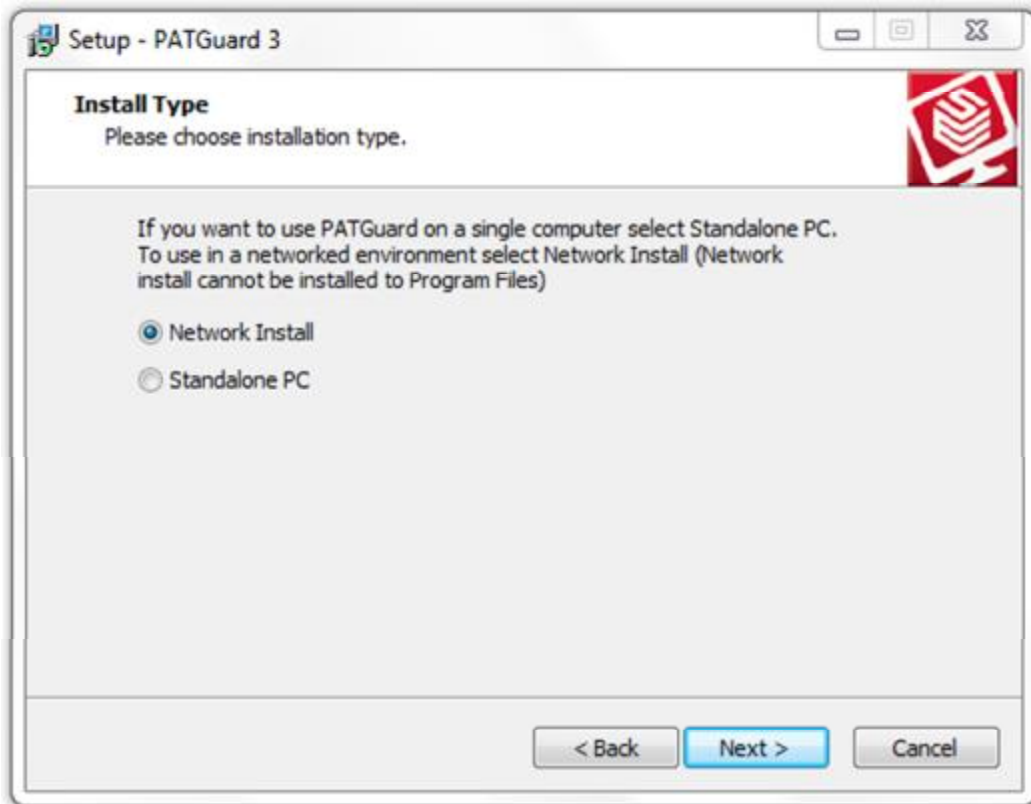
Installation Screen 1

Review the [Licence Agreement](#) and click **Next >** to continue.



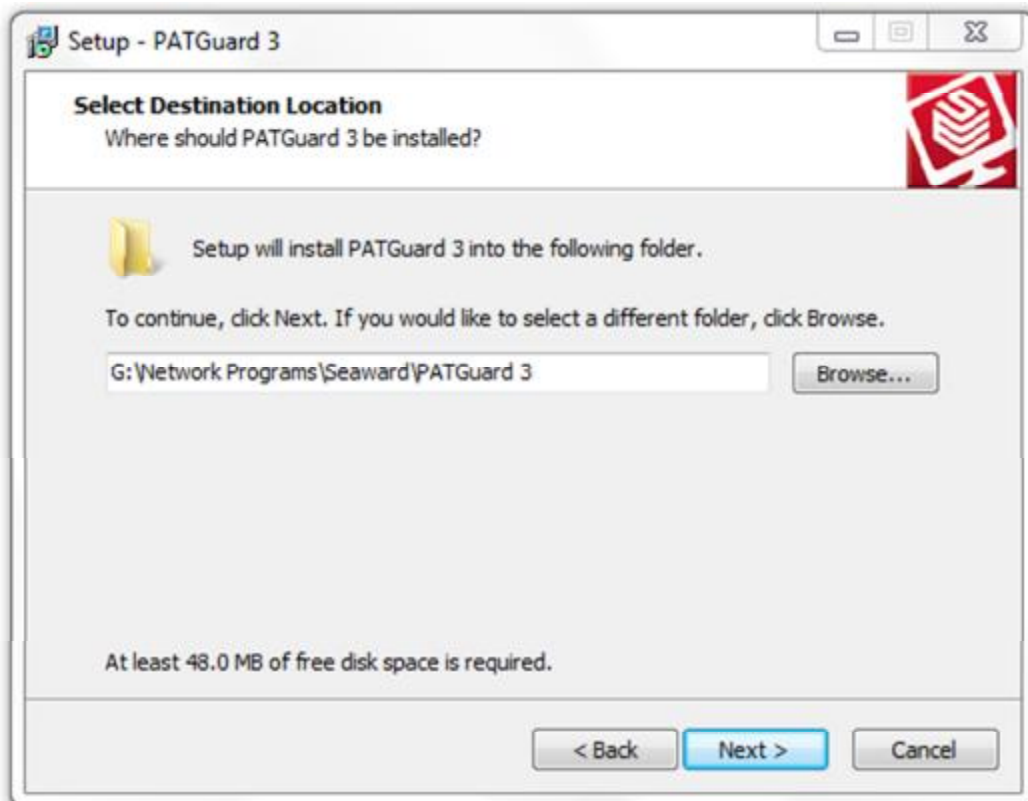
Installation Screen 2

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



Installation Screen 3

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



Installation Screen 4

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

If you encounter problems installing PATGuard 3, please refer to the [Support](#) page.

Installing on a network Workstation

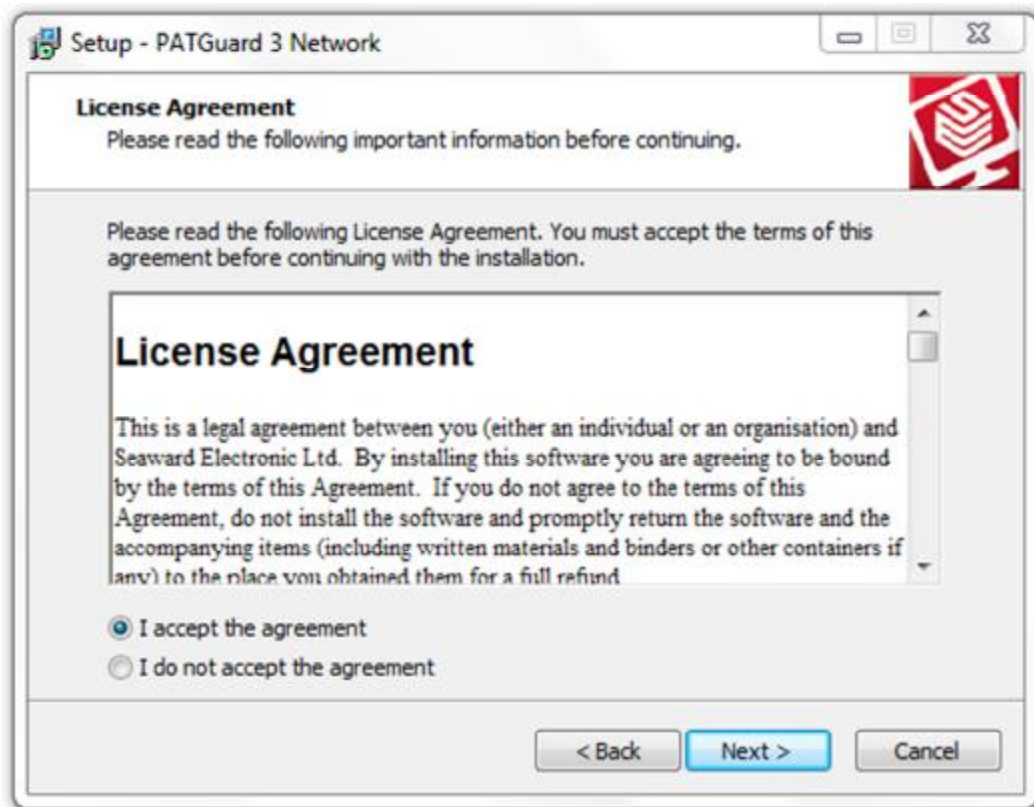
Installing on a network Workstation

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



Installation Screen 1

Review the [Licence Agreement](#) and click **Next >** to continue.



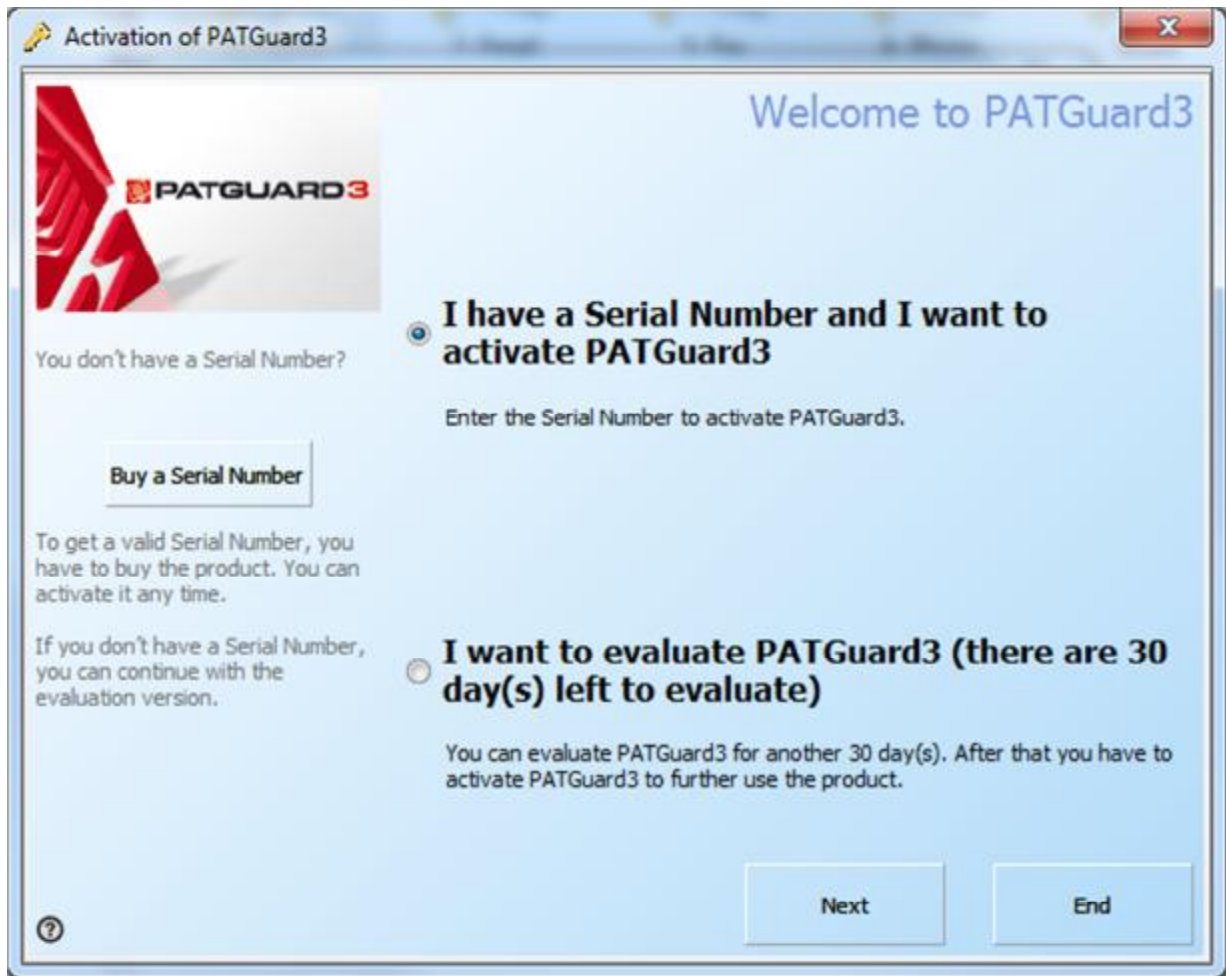
Follow the remaining on-screen instructions to install PATGuard 3 on your network Workstation.

If you encounter problems installing PATGuard 3, please refer to the [Support](#) page.

Activating PATGuard 3

Activating PATGuard 3

Once you have installed PATGuard 3 you will see the Activation screen. You can choose to either Activate PATGuard 3 or continue using the 30 day [Evaluation Period](#).



Activation Screen

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

- [Activate Online](#)
- [Activate by Phone, Email or Fax](#)

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

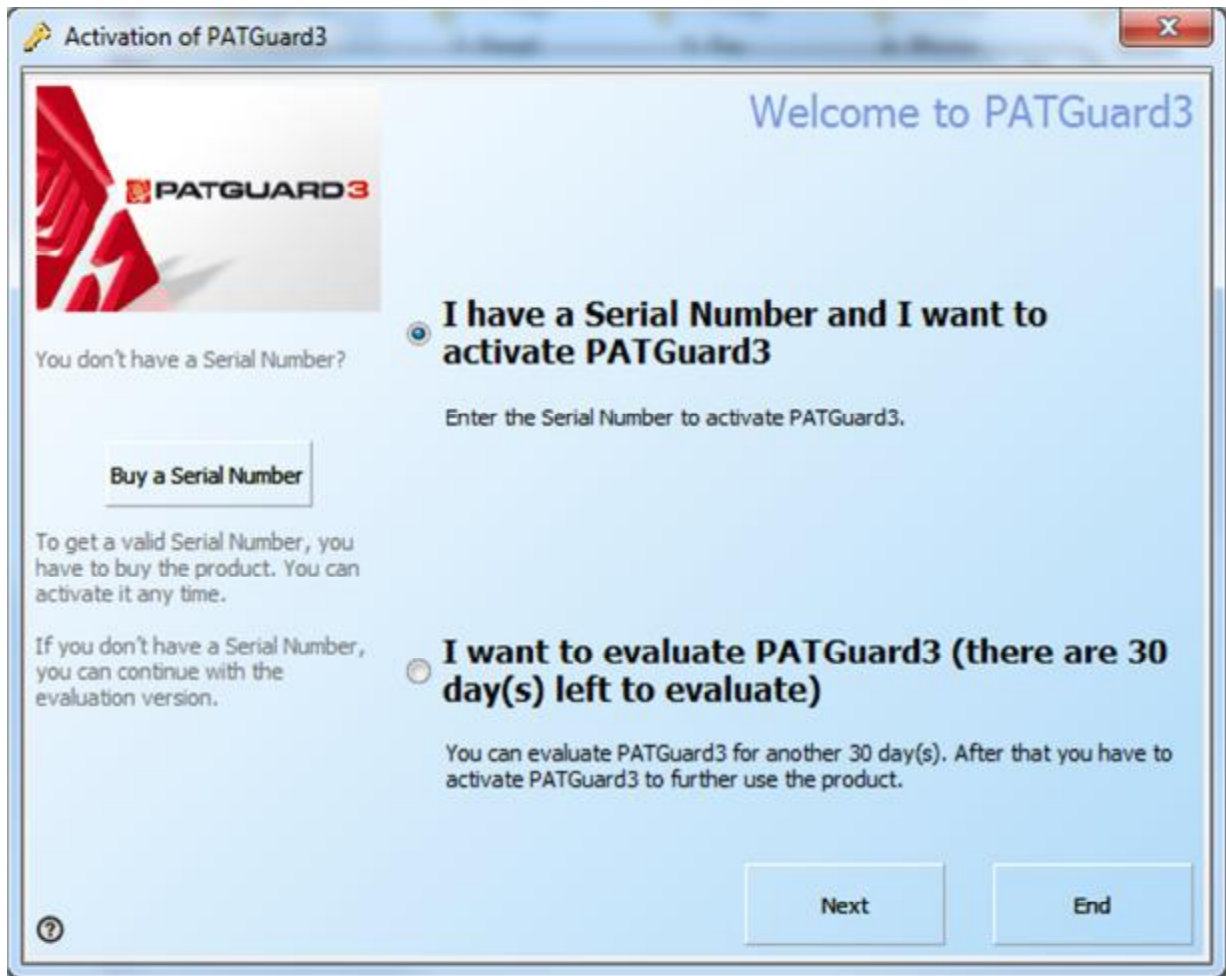
You can also choose to make use of the 30-day [Evaluation Period](#) and activate PATGuard later.

If you encounter problems activating PATGuard 3, please refer to the [Support](#) page.

Activate Online

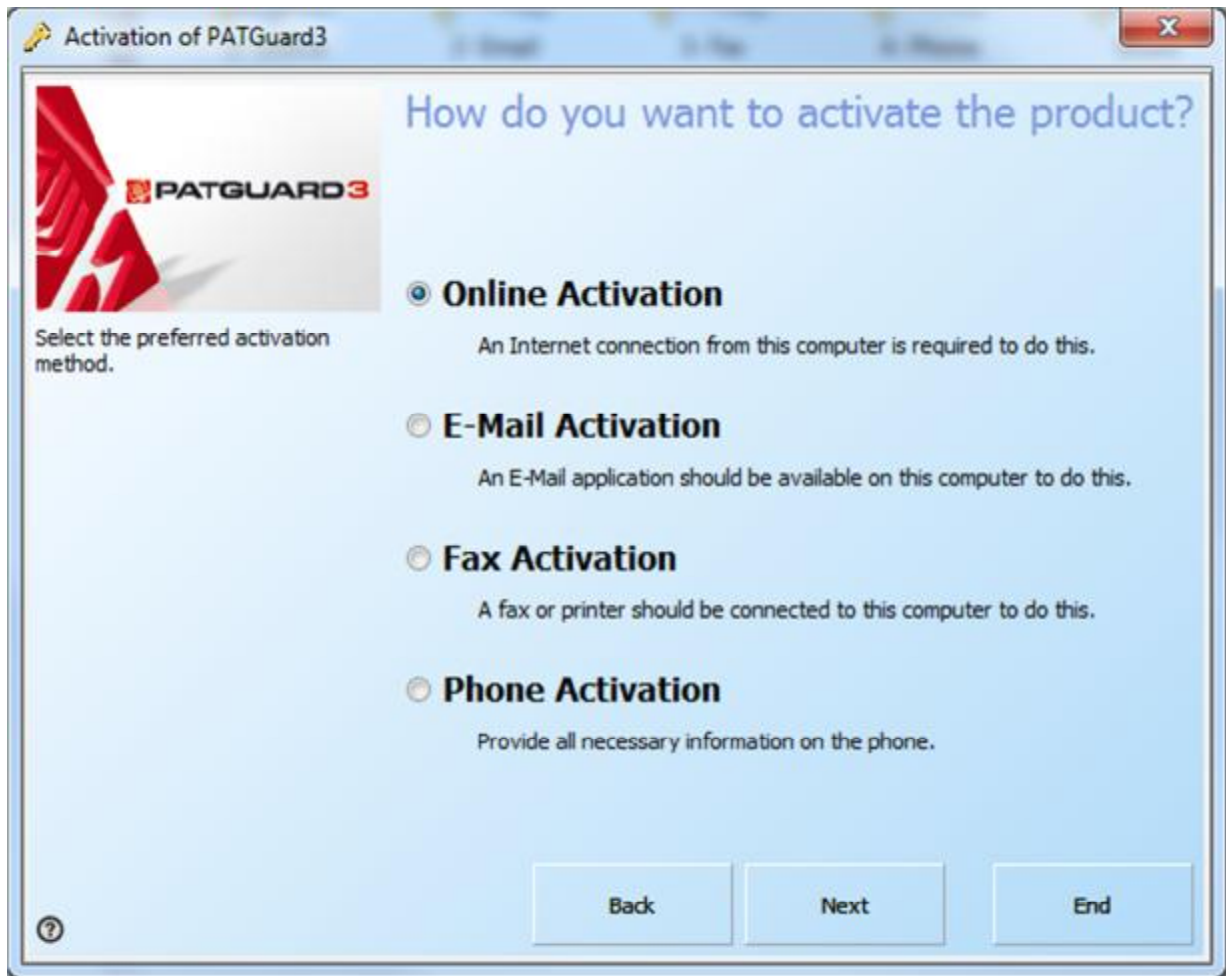
Activate Online

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



Activation Screen 1

Select **Online Activation** on the following screen and click **Next**.



Activation Screen 2

Enter your details on the following screen and click **Next**.

Activation of PATGuard3

Please enter the activation data

Serial Number
[Where do you find your Serial Number?](#)

Customer Number

Company

Salutation

First Name

Last Name

Country

E-Mail Address

Back Next End

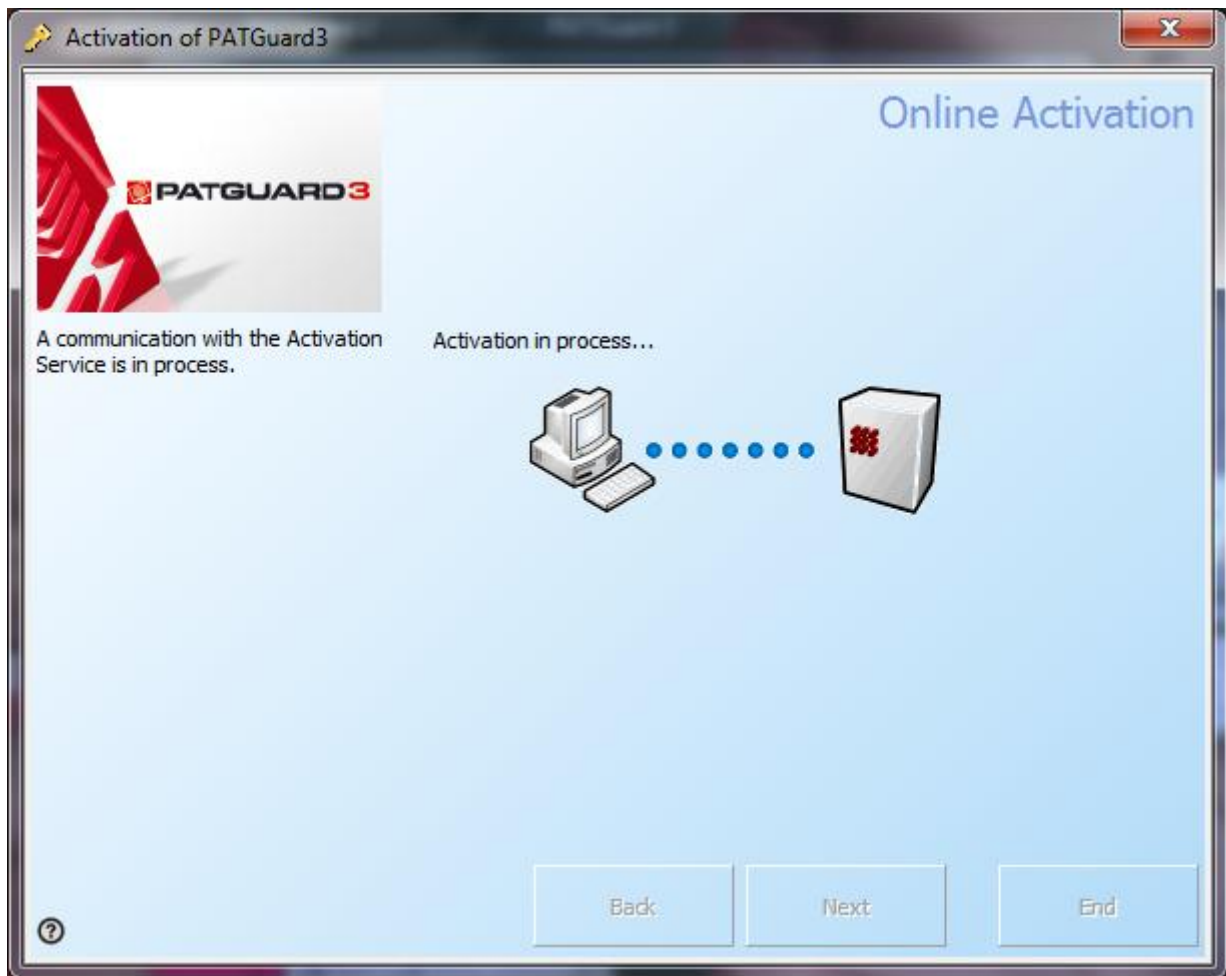
Activation Screen 3

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



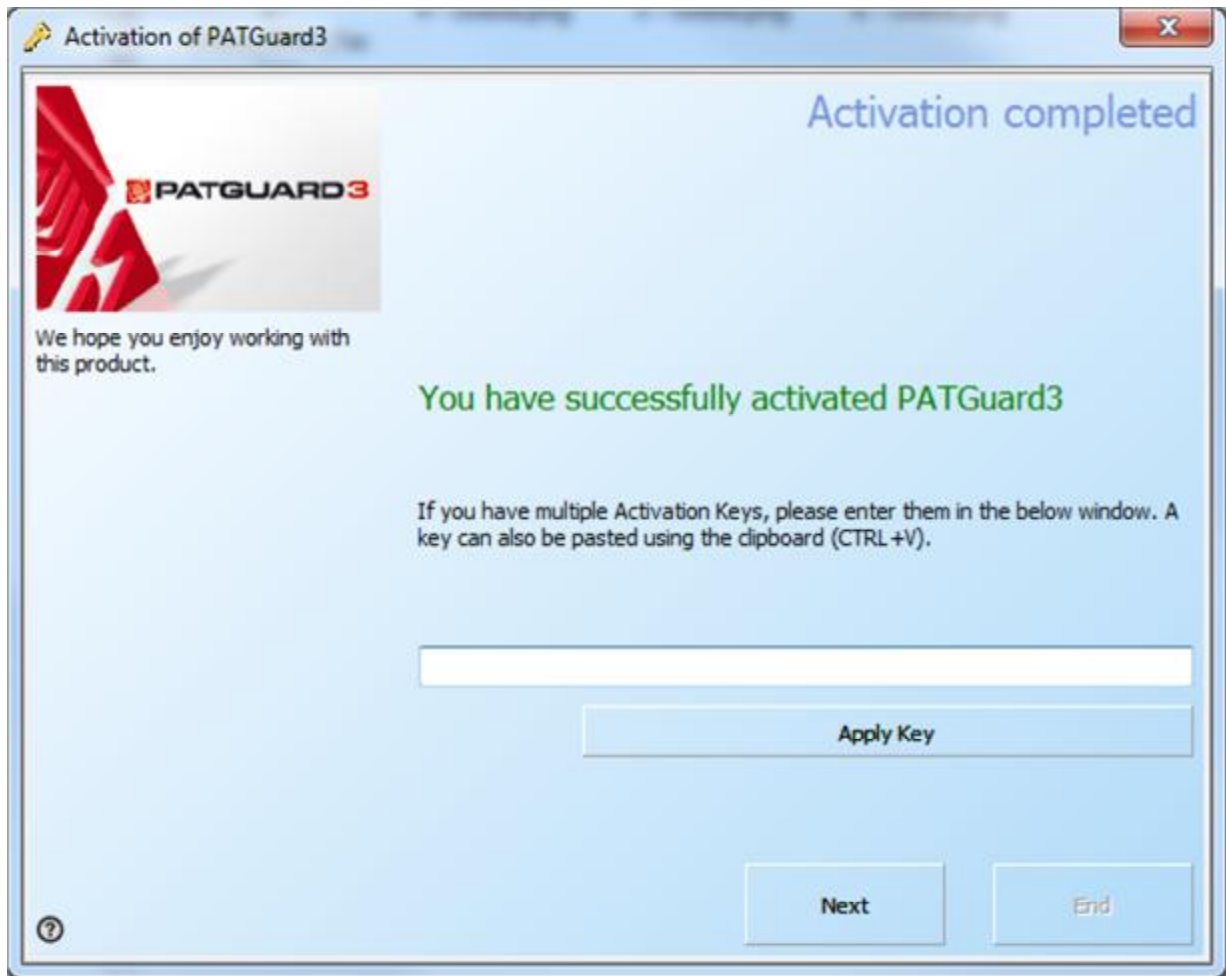
Activation Screen 4

PATGuard 3 will now connect to the Activation Service.



Activation Screen 5

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



Activation Screen 6

Entering Proxy Server details

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



Proxy server details

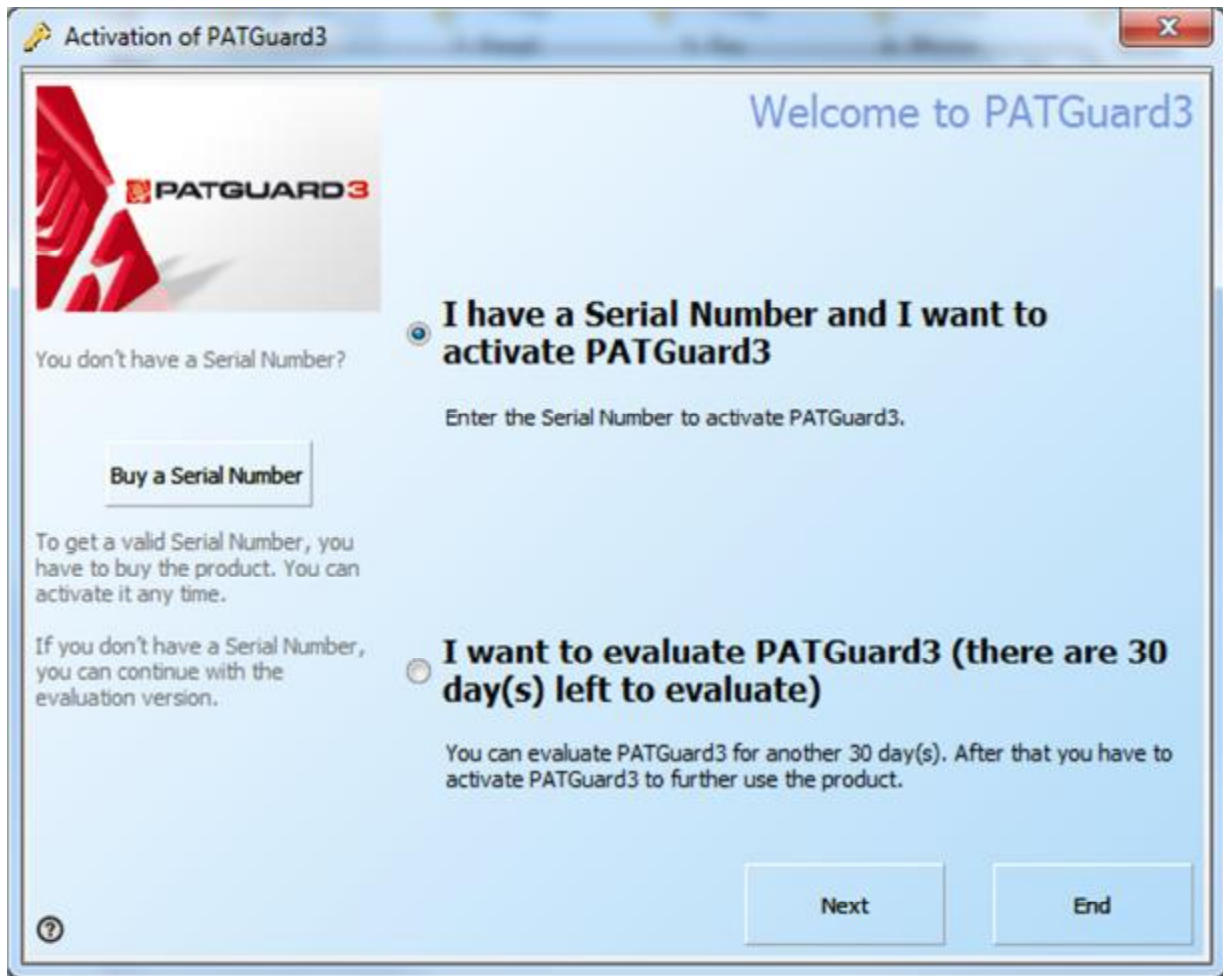
If you encounter problems activating PATGuard 3, please refer to the [Support](#) page.

Activate by Phone, Email or Fax

Activate by Phone, Email or Fax

The simplest way to activate PATGuard 3 is to [Activate Online](#). However if you do not have an internet connection or wish to activate in a different way, you may choose to Activate by Phone, Email or Fax.

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



Activation Screen 1

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



Activation Screen 2

Enter your details on the following screen and click **Next**.

Activation of PATGuard3

Please enter the activation data

Serial Number
[Where do you find your Serial Number?](#)

Customer Number

Company

Salutation

First Name

Last Name

Country

E-Mail Address

Back Next End

Activation Screen 3

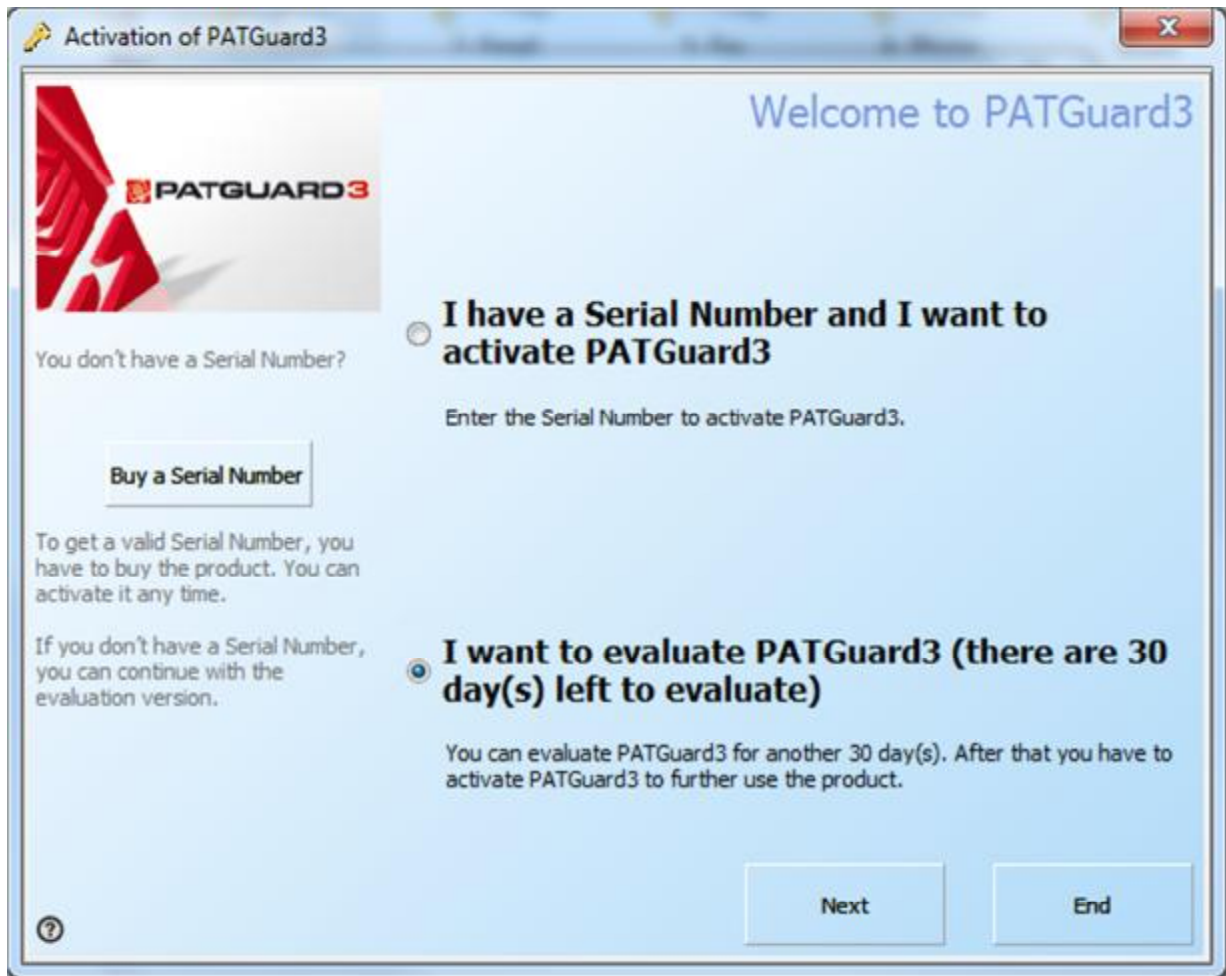
Follow the instructions provided to finish the activation process. Unlike [Activating Online](#), you will be provided with an Activation Key that you will need to enter to complete the process..

If you encounter problems activating PATGuard 3, please refer to the [Support](#) page.

Evaluation Period

Evaluation Period

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



Activation Screen - Evaluation

Once the evaluation period is over PATGuard 3 will revert to a read-only mode and you will not be able to add to or amend the database until you [Activate PATGuard 3](#).

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

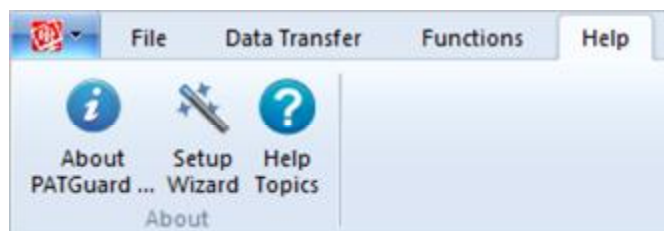
- [Activate Online](#)
- [Activate by Phone, Email or Fax](#)

If you encounter problems activating PATGuard 3, please refer to the [Support](#) page.

Setup Wizard

Setup Wizard

The Setup Wizard runs the first time PATGuard 3 starts, and can also be accessed by clicking **Setup Wizard** in the [Help Menu](#).



Setup Wizard - Help Menu

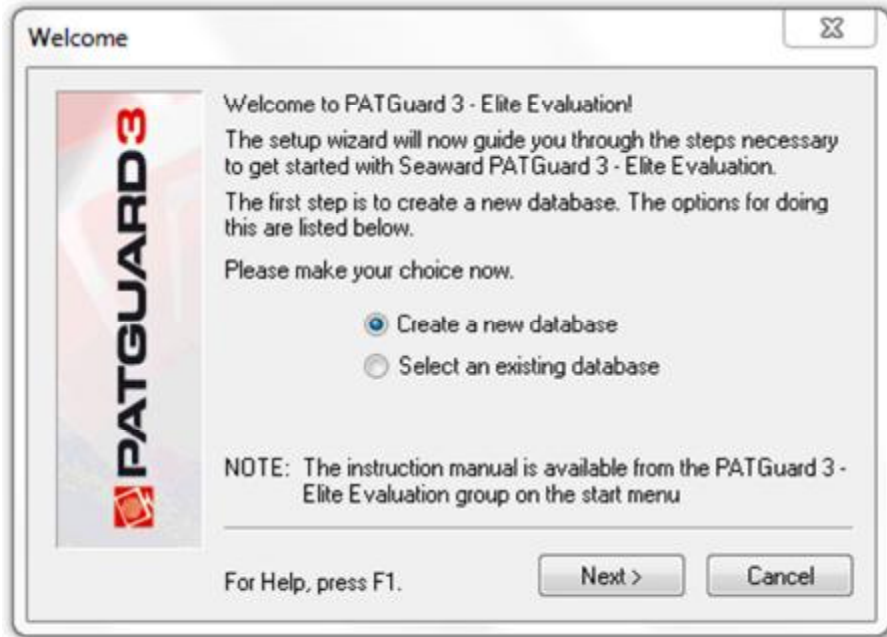
The Setup Wizard will first guide you through the process of [Setting up a Database](#). It will then take you to the [Setup](#) screen to allow you to enter your [Company Details](#), add [User Accounts](#), and configure [PAT Options](#) and [Asset Groups](#).

Please continue to the [Setting up a Database](#) page.

Setting up a Database

Setting up a Database

The first step in the [Setup Wizard](#) is Setting up a Database, which will be used to store all of your PATGuard 3 data.



Setup Wizard

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

- [Create a new database](#)
- [Select an existing database](#)

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

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

[Create a new database](#)

Create a new database

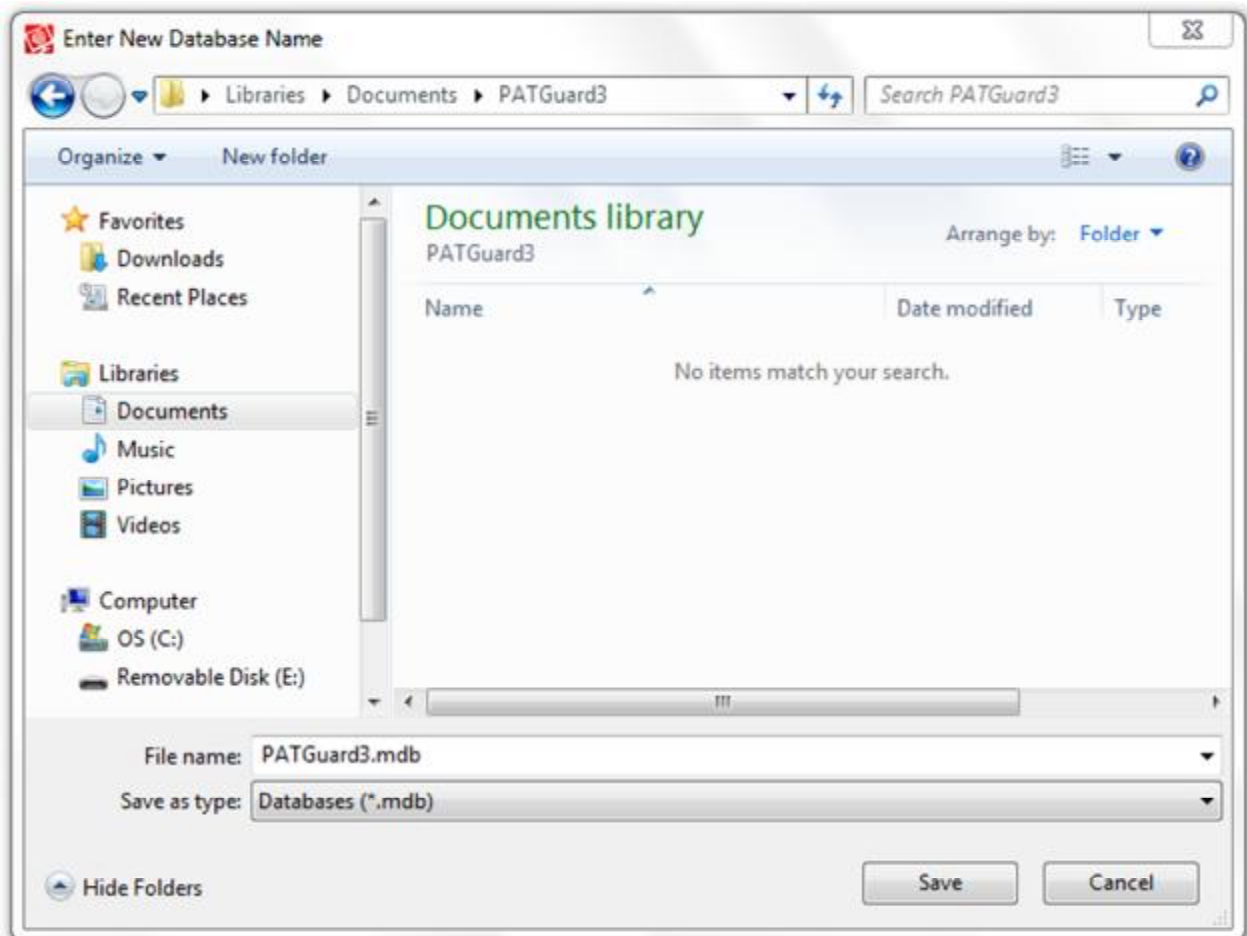
If you do not have an existing PATGuard database that you want to use, this is the option for you. If it is not, see [Select an existing database](#).



Create a new database - Setup Wizard

Enter new database name

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



Enter new database name

After clicking **Save** the [Setup Wizard](#) will take you to the [Setup](#) options window.

Please continue to the [Setup](#) page.

Select an existing database

Select an existing database

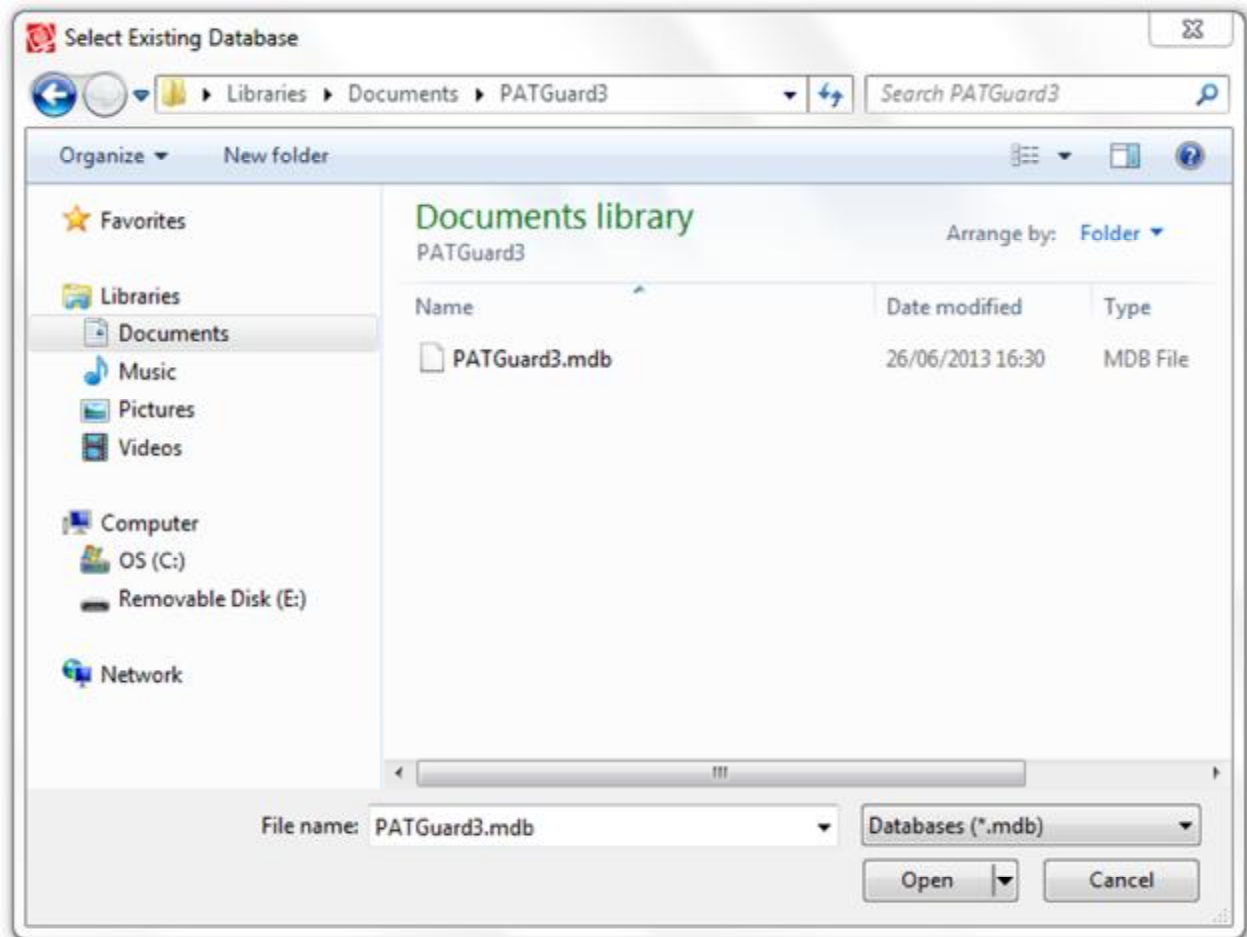
If you have an existing PATGuard database that you want to use, this is the option for you. If it is not, see [Create a new database](#).



Select an existing database - Setup Wizard

Select existing database

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



Select Existing Database

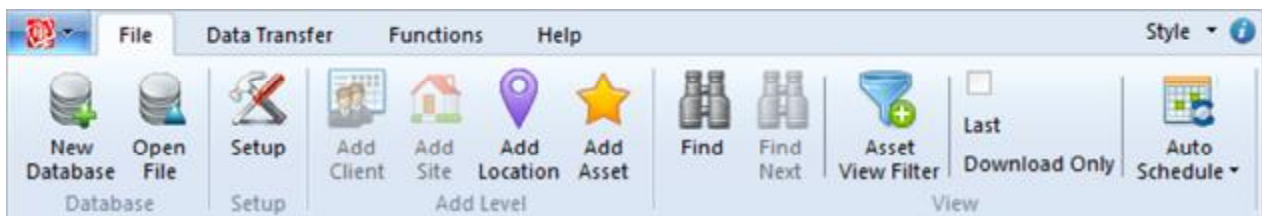
After selecting the existing database you wish to use and clicking **Open**, the [Setup Wizard](#) will take you to the [Setup](#) options window.

Please continue to the [Setup](#) page.

Setup Options

Setup Options

The [Setup Window](#) forms part of the [Setup Wizard](#) but can also be accessed by clicking **Setup** in the [File Menu](#).



File Menu

Setup Window

Setup Window

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

- [Company Details](#)
- [User Accounts](#)
- [PAT Options](#)
- [Asset Groups](#)

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

Company Details

Company Details

The Company Details tab in the [Setup Window](#) allows you to enter your company details, including address information, phone number, email address and VAT and Company registration numbers. These details will appear on any [Reports](#) that you generate.

Setup

Company Details | User Accounts | PAT Options | Asset Groups

Company: PAT Ltd

Address: PAT Ltd HQ
An Industrial Estate

Tel: 0122345678

Town/City: North of Watford Gap

Fax: 0122345679

County:

Email: jane@pat.co.uk

Postcode: NE1 2BE

Logo (.jpg): Files\Seaward\PATGuard 3\reports\seaward.jpg

VAT reg. no.: 0123456789

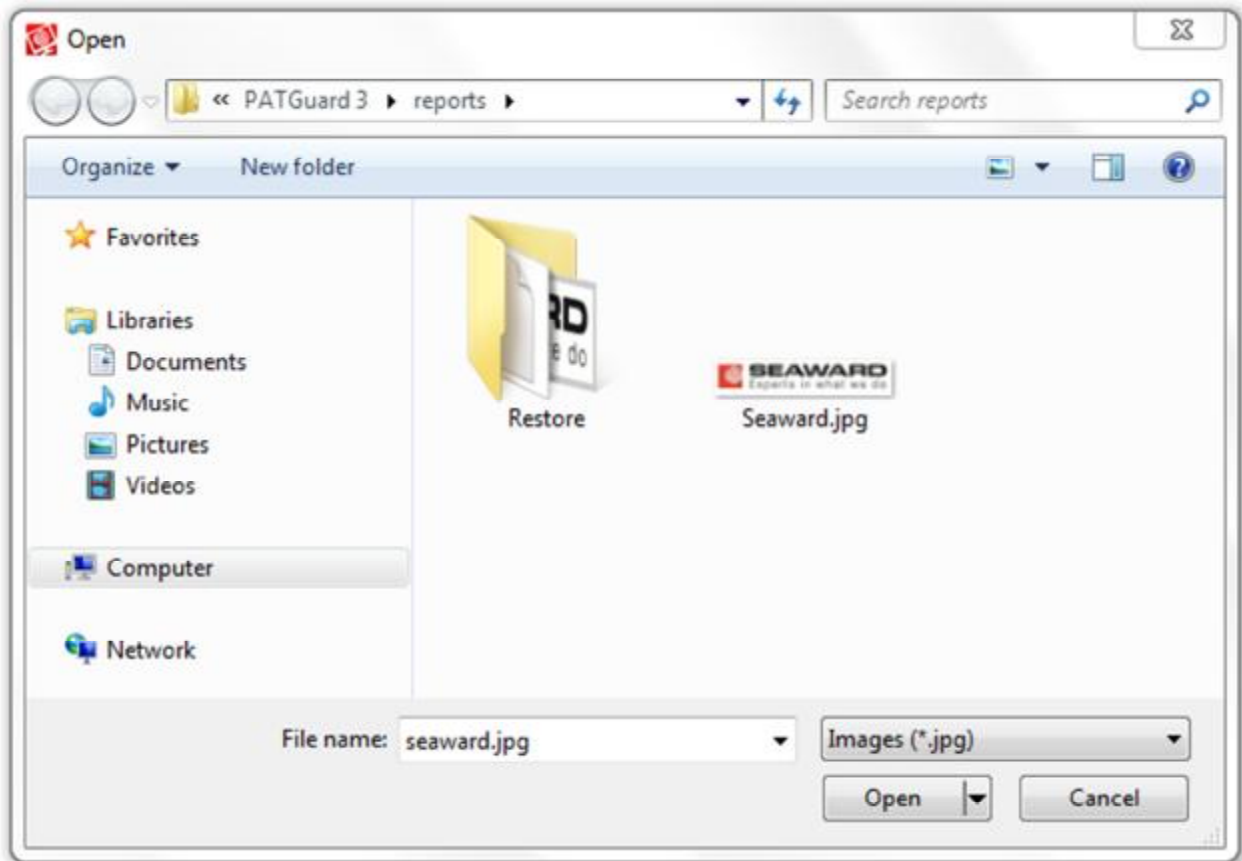
Company reg. no.: 9876543210

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

Setup - Company Details

Company Logo

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



Setup - Browse for new logo

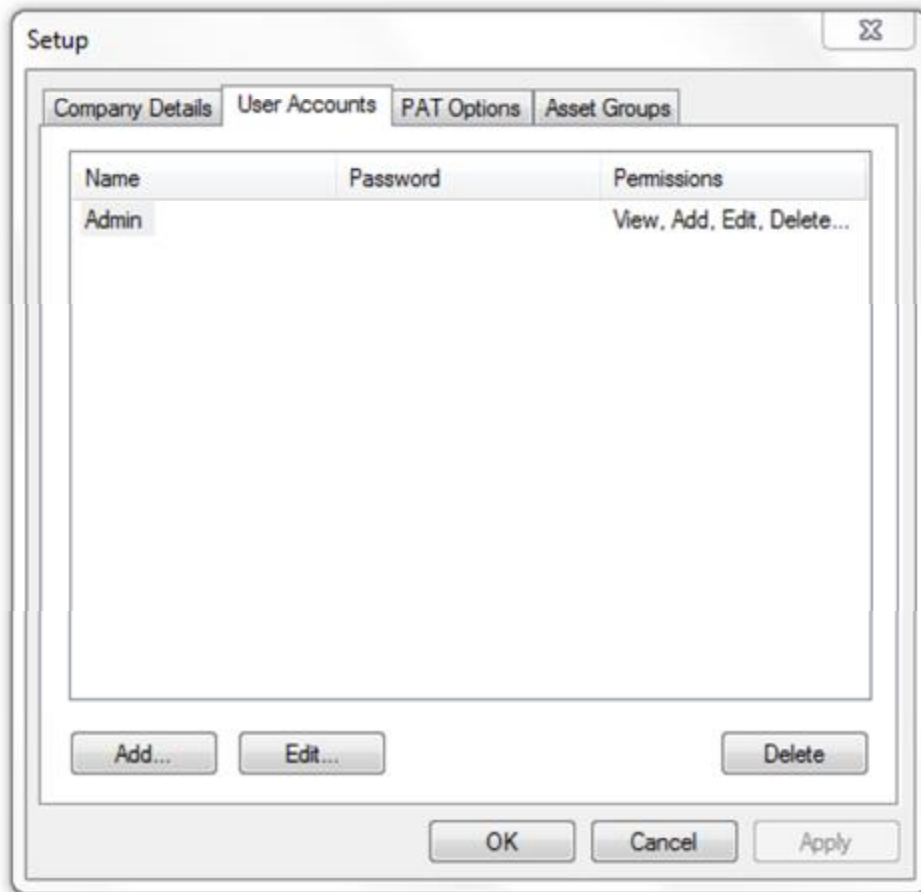
Once you have selected the image you would like to use, click **Open** to return to the Company Details tab.

Please continue to the [User Accounts](#) page.

[User Accounts](#)

User Accounts

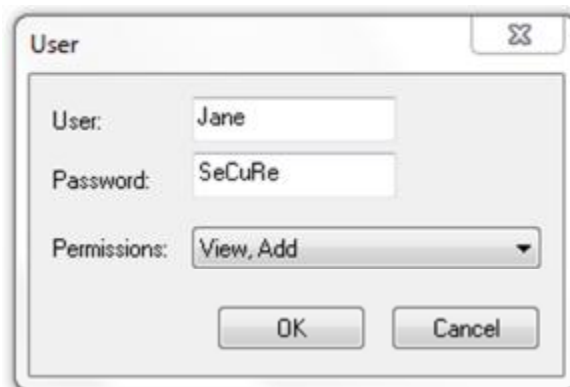
The User Accounts tab in the [Setup Window](#) allows you to [Add](#), [Edit](#) and [Delete](#) users of PATGuard 3.



Setup - User Accounts

Add new user

To add a new user, click the **Add..** button in the User Accounts tab in the [Setup Window](#).



Add New User

Each user has a user name, an optional password and a [Permissions level](#).

Edit a user

To edit a user, select the user name in the User Accounts tab in the [Setup Window](#) and click the **Edit...** button.

Delete a user

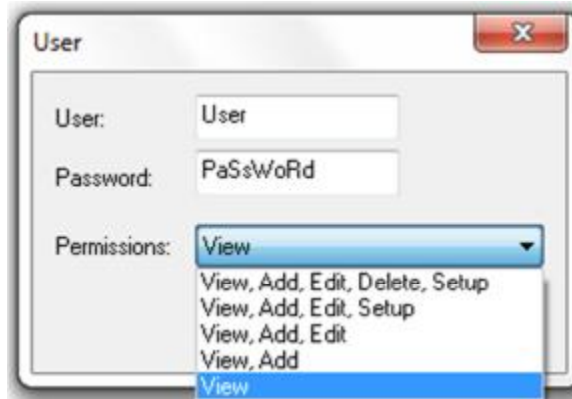
To delete a user, select the user name in the User Accounts tab in the [Setup Window](#) and click the **Delete** button.

Admin user

The default Admin account cannot be renamed, deleted or have the [Permissions level](#) changed. It is strongly recommended that a password is set for the Admin account to prevent unauthorised access.

Permissions level

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



Permissions Level

The most limited Permissions level is **View**, which allows a user to look at but not edit the database. The highest permissions level is **View, Add, Edit, Delete, Setup**, which is the same permissions level as the default [Admin user](#).

Please continue to the [PAT Options](#) page.

PAT Options

PAT Options

The PAT Options tab in the [Setup Window](#) allows you to set the [Tester Output](#) options and to configure [Code Abbreviations](#) for use on your tester.

Setup

Company Details User Accounts PAT Options Asset Groups

Tester Output

Text Line 1: Asset Description Text Line 3: Location

Text Line 2: Asset Group Text Line 4: Person

Use code abbreviations on tester Show codes for: Asset Description

Code	Represents

Hint: Save typing on the TESTER by entering abbreviations prefixed by 9. Setup your abbreviations here but DO NOT include the 9 in this table.

Add Delete

OK Cancel Apply

Setup - PAT Options

Tester Output

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

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

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

Code Abbreviations

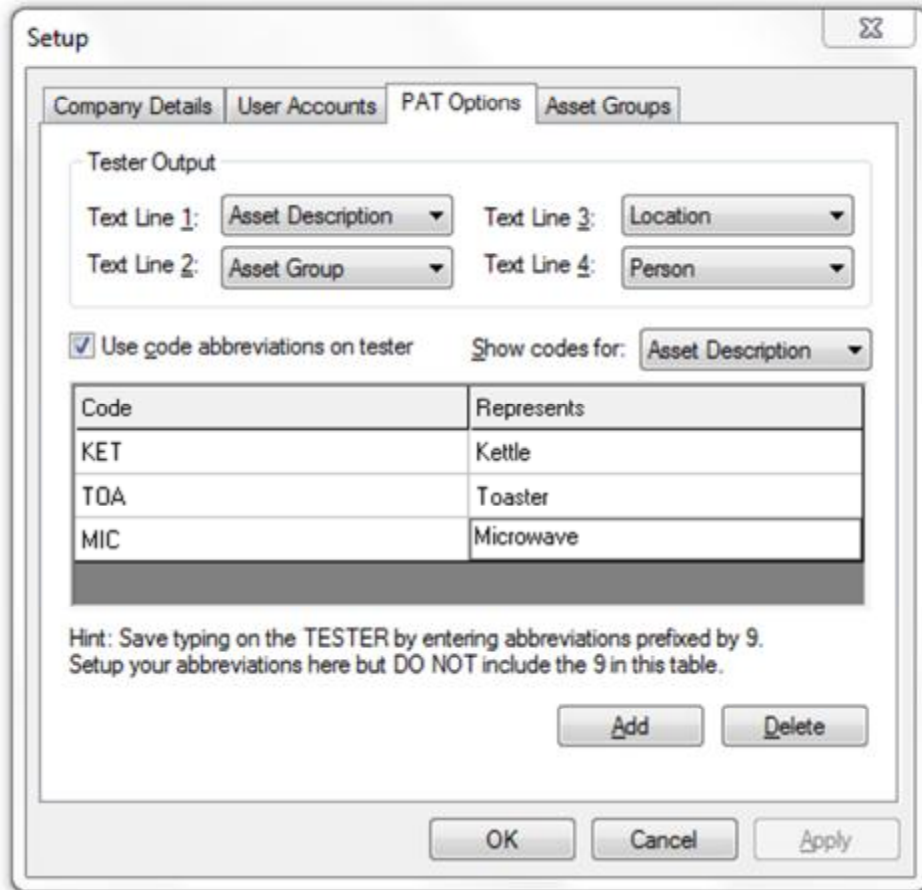
See the [Code Abbreviations](#) page for more information on Code Abbreviations.

Code Abbreviations

Code Abbreviations

Code Abbreviations are used to help save time typing on the test instrument. If you wish to use Code Abbreviations on your test instrument, and your test instrument is able to use Code Abbreviations, tick the **Use code abbreviations on tester** box in the [PAT Options](#) tab.

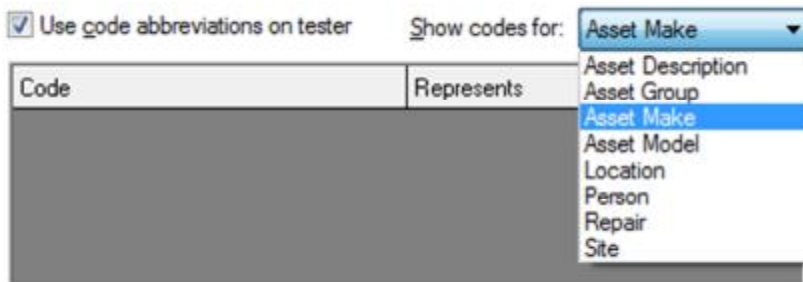
When this option is enabled text prefixed with a **9** (nine) will be checked against the list of Code Abbreviations and, if found, the Code Abbreviation will be expanded. In the example below, **9KET** would expand to Kettle, **9TOA** to Toaster etc.



Code Abbreviations

Code Abbreviation Category

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



Code Abbreviation Fields

Adding a new Code Abbreviation

To add a new Code Abbreviation, select the [Code Abbreviation Category](#) that you would like to add a new Code Abbreviation to. Click the **Add** button to add a new line.

Use code abbreviations on tester Show codes for: Asset Description ▼

Code	Represents
KET	Kettle
MIC	Microwave
TOA	Toaster

Add a new Code Abbreviation

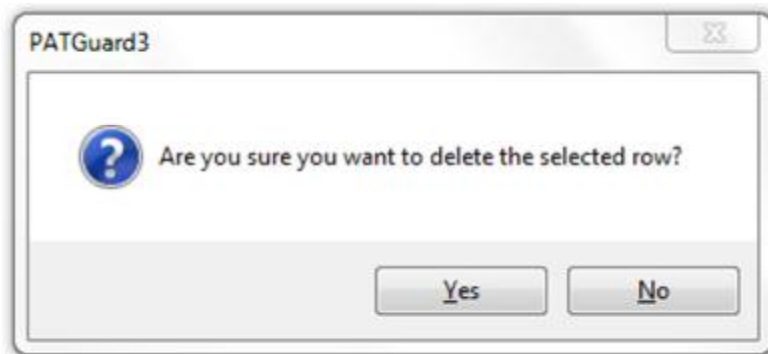
In the new line, enter the 3-digit Code you would like to use in the *Code* column. The **9** should not be included for the Code in the Code Abbreviation table. Enter the full description in the *Represents* column.

Editing a Code Abbreviation

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

Deleting a Code Abbreviation

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

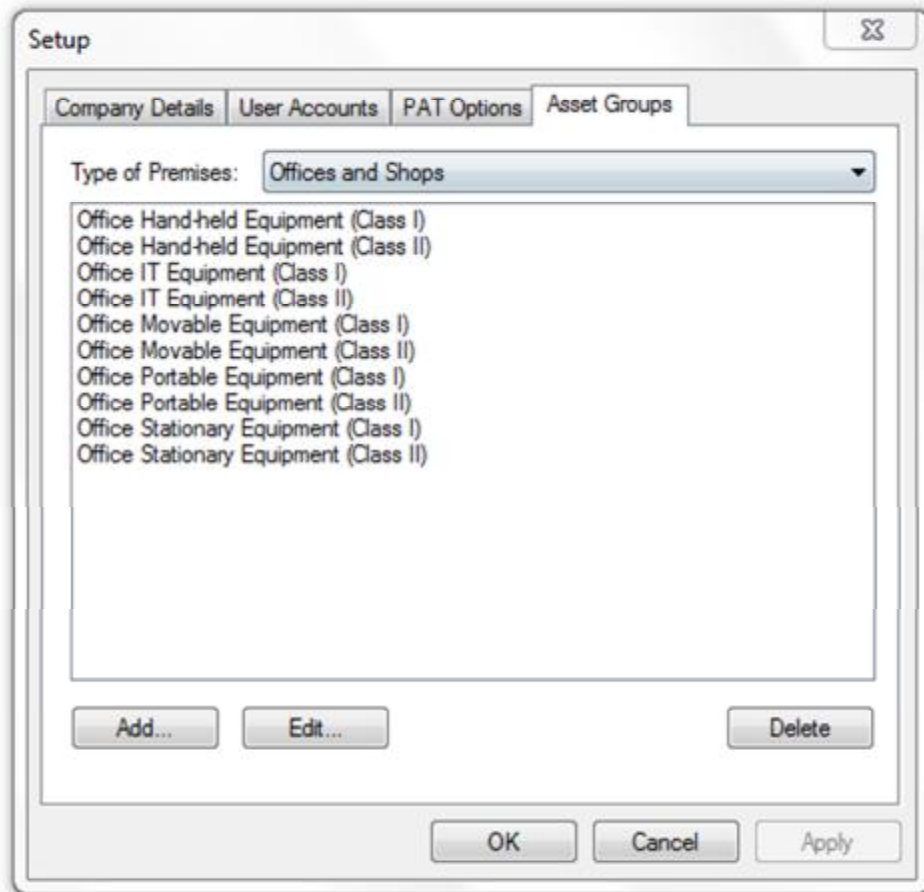


Delete Code Abbreviation

Asset Groups

Asset Groups

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



Setup - Asset Groups

Pre-defined Asset Groups

In the UK, the Health and Safety Executive (HSE) and the Institute of Engineering and Technology (IET, formerly the 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).

PATGuard 3 contains a set of pre-defined Asset Groups based on this guidance. 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).

Type of Premises

PATGuard 3 contains a list of Premises Types, each containing a number of [pre-defined Asset Groups](#). These Asset Groups can be accessed by selecting the Premises Type from the **Type of Premises** drop-down box.



Type of Premises

Adding an Asset Group

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

Add Asset Group

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

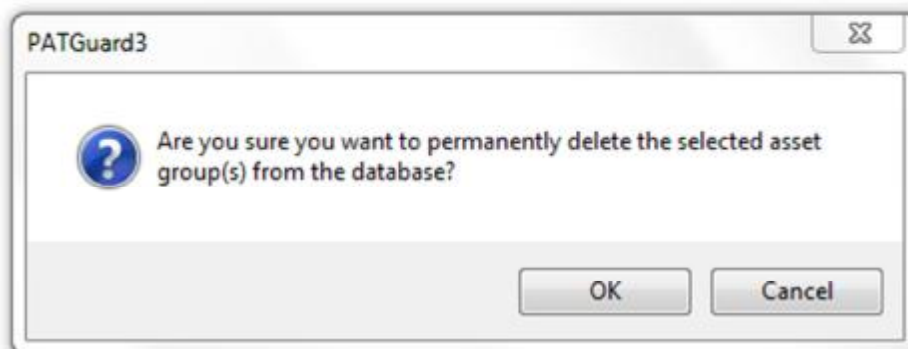
Default Test Codes can also be entered to instruct your test instrument how to test this group of assets, if your test instrument supports Test Codes. *Please refer to your test instrument manual for more information on Test Codes.*

Edit an Asset Group

To edit an Asset Group, select the Asset Group name in the Asset Groups tab in the [Setup Window](#) and click the **Edit...** button. This will open the Asset Group window.

Delete an Asset Group

To delete an Asset Group, select the Asset Group name in the Asset Groups tab in the [Setup Window](#) and click the **Delete** button. You will be prompted for confirmation.

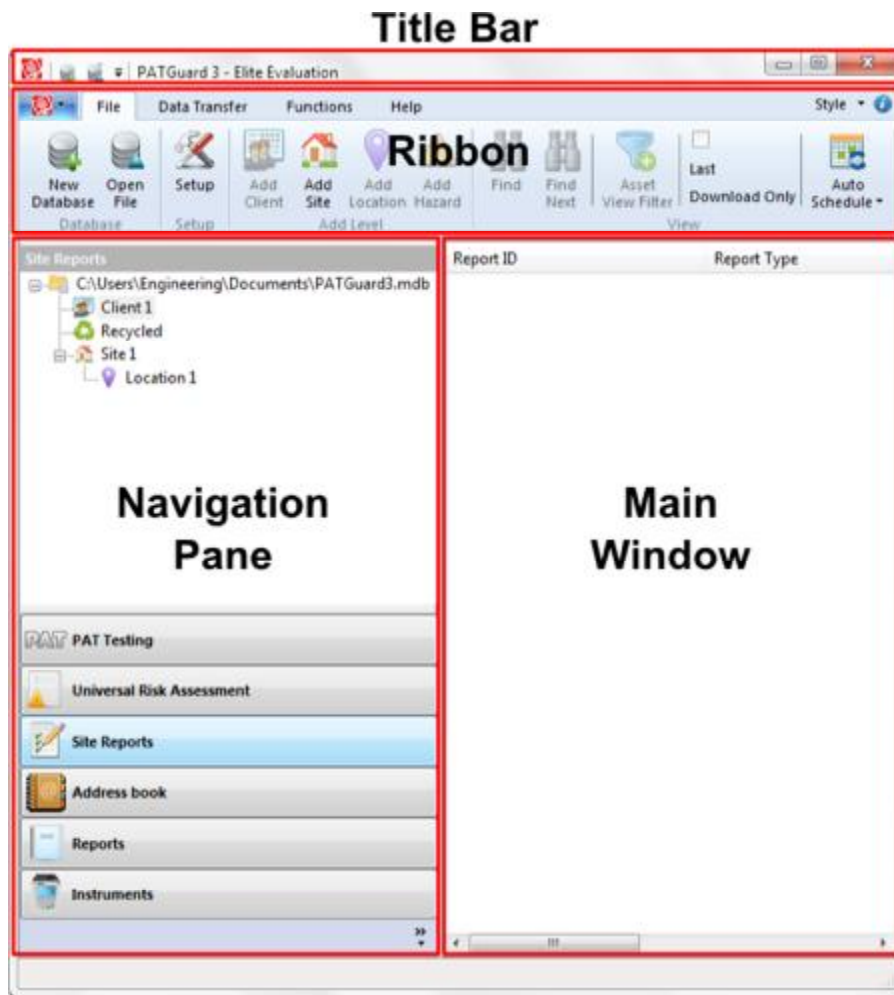


Delete Asset Group

Navigating PATGuard 3

Navigating PATGuard 3

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



PATGuard 3

Title Bar

The Title Bar contains the [Quick-access Toolbar](#) as well as [Minimise](#), [Maximise](#) and [Close](#) buttons.

For more information, see the [Title Bar](#) page.

Ribbon

The Ribbon provides access to the [File](#), [Data Transfer](#), [Functions](#) and [Help](#) menus along with the [Style](#) options.

For more information, see the [Ribbon](#) page.

Navigation Pane

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

For more information, see the [Navigation Pane](#) page.

Main Window

The contents of the Main Window depend on which [PATGuard 3 function](#) is selected. For example, when using the [PAT Testing](#) function, the Main Window displays details of the stored assets and test results.

For more information, see the [Main Window](#) page.

Short-cut Keys

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

For more information, see the [Short-cut Keys](#) page.

The Title Bar

The Title Bar

The Title Bar is at the top of the PATGuard 3 user interface and contains the [Quick-access Toolbar](#) as well as the [Minimise, Maximise and Close](#) buttons.



Quick-access Toolbar



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

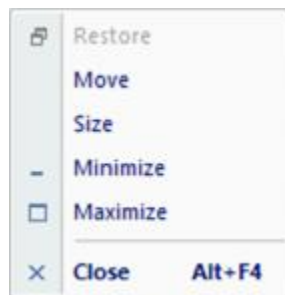
Minimise, Maximise and Close buttons



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

Context Menu

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



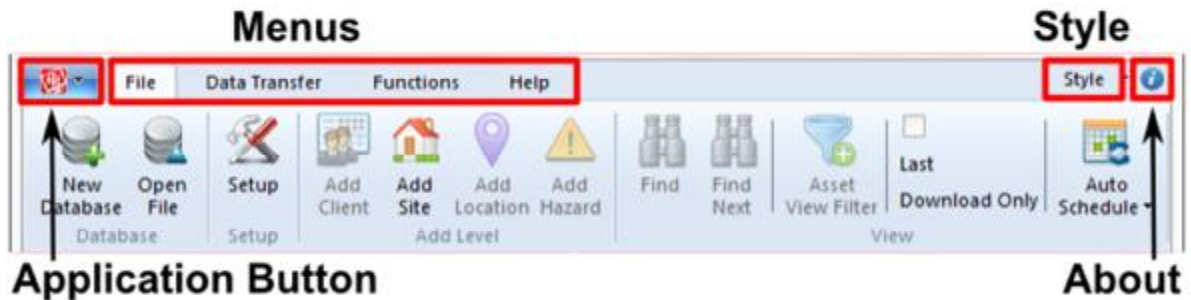
The context menu provides options to move, resize, minimise, maximise/restore and close PATGuard 3.

The Ribbon

The Ribbon

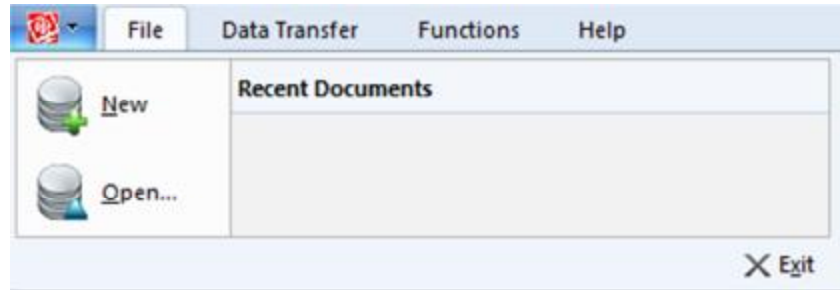
The Ribbon provides access to the [File](#), [Data Transfer](#), [Functions](#) and [Help](#) menus.

The Ribbon also contains the [Application Button](#), the [Style Options](#) menu and a link to the [About Screen](#).



The Ribbon

Application Button



Application Button menu

The Application Button opens a menu with options to [Create a new database](#) or [Open an existing file](#). The menu also shows a list of recent documents that are available to open, along with an Exit button.

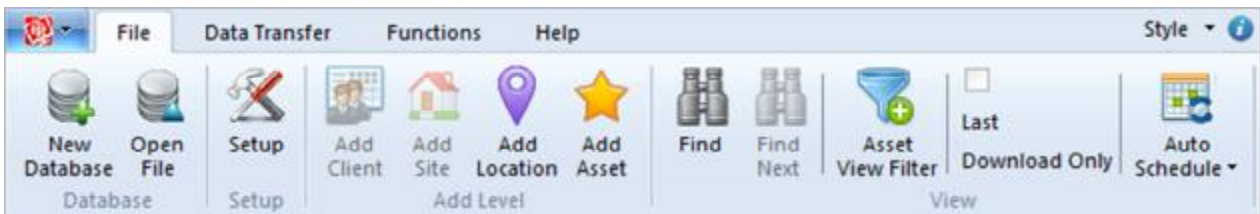
Minimising and Maximising the Ribbon

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

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

File Menu

File Menu



File Menu

The File Menu contains the following options:

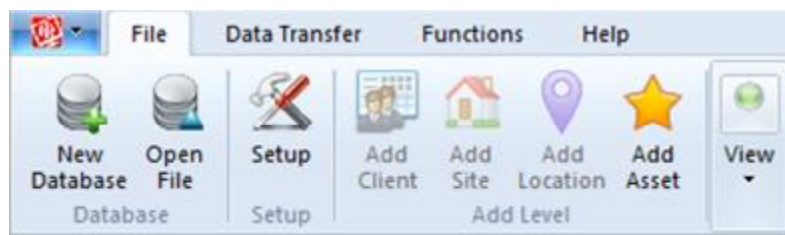
- [New Database](#)
- [Open File](#)
- [Setup](#)

- [Add Client](#)
- [Add Site](#)
- [Add Location](#)
- [Add Asset/Add Hazard](#) (depending on context)
- [Find](#)
- [Find Next](#)
- [Asset View Filter](#)
- [Last Download Only](#)
- [Auto Schedule](#)

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

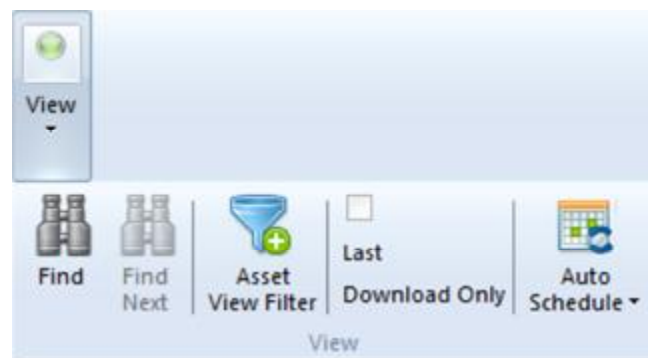
Condensed View

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



File Menu - condensed view

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

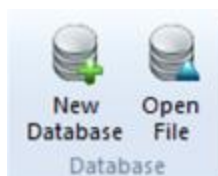


File Menu - condensed view (expanded)

Open an existing file

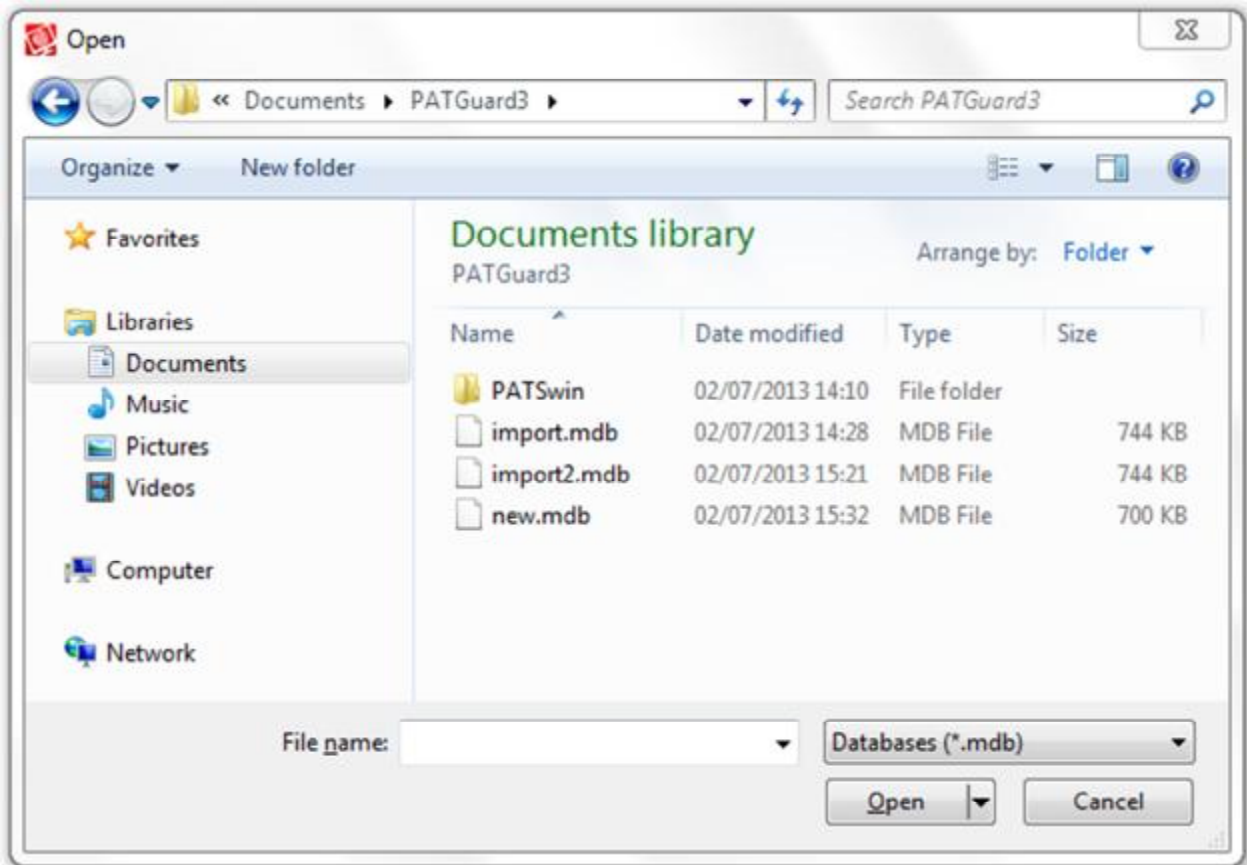
Open an existing file

To open an existing file or database, select **Open File** from the [File Menu](#) (or from the [Quick-access Toolbar](#) or [Application Button](#)).



File Menu - Open

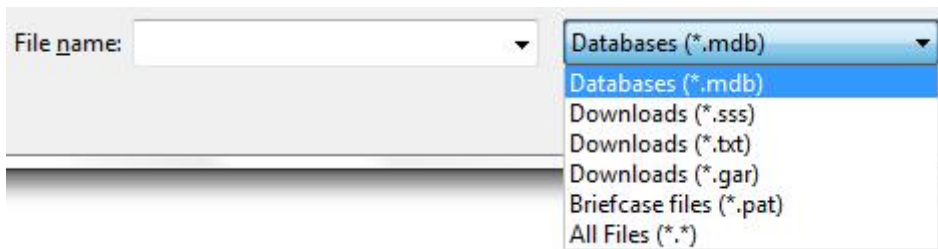
This will open the Open File window, which allows you to browse to the file you wish to open.



Open File window

File Types

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



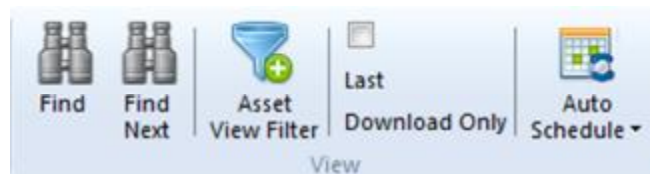
Open File - File Type Options

Opening a Database (.mdb) will close the database that is currently in use and open the selected database. Opening any of the Downloads options (.sss, .txt, .gar) or Briefcase (.pat) files will [import](#) the data in the selected file into the current database.

Find

Find

To search for assets matching particular criteria, select the **Find** option from the [File Menu](#).



File Menu - View - Find/Find Next

The fields in the Find window are used to define the search criteria. You can search by [Site](#), [Location](#), Asset ID, Description, [Asset Group](#), Serial Number or Next Check Date.

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

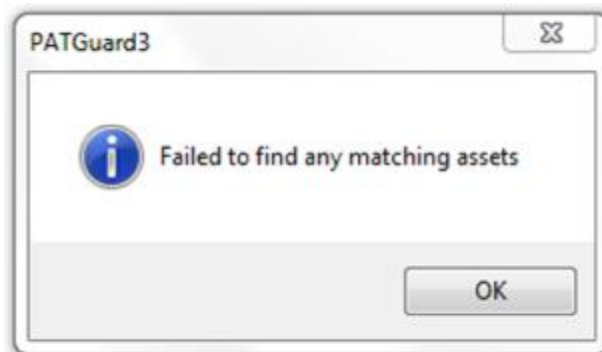
Find Window

The search criteria given must ALL be present in an asset for a match to occur. If a matching asset is found the [Tree View](#) will display its location and the asset will be selected in the [Asset View](#).

Find Next

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

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

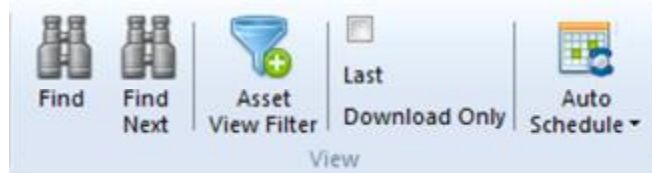


Find - No Matching Assets

Asset View Filter

Asset View Filter

To filter the [Asset View](#) for assets with particular next test dates, select the **Asset View Filter** option from the [File Menu](#).

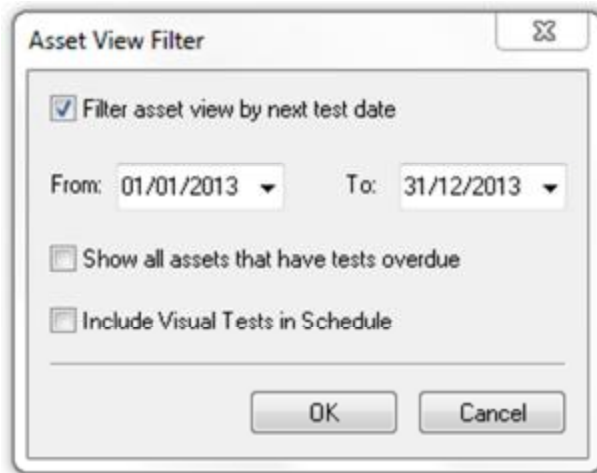


File Menu - View - Asset View Filter

To filter the [Asset View](#) by next test date, tick the **Filter asset view by next test date** box and then change the **From** and **To** dates according to your requirements.

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

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



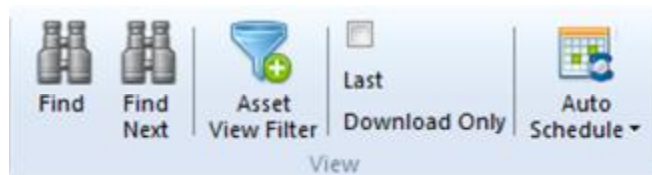
Asset View Filter window

Clicking **OK** will apply the Asset View Filter, and only assets matching the filter will be displayed in the [Asset View](#).


Last Download Only

Last Download Only

To filter the [Asset View](#) so that only assets added or modified by the last download appear, select the **Last Download Only** option from the [File Menu](#).



File Menu - View - Asset View Filter

Only the assets added or modified by the last download will appear in the [Asset View](#). Selecting **Last Download Only** again removes the filter so that all assets can be seen. Newly created assets are differentiated from modified assets by a  icon.

Using the Last Download Only function overrides any previously applied [Asset View Filter](#).

Data Transfer Menu

Data Transfer Menu



Data Transfer Menu

The Data Transfer Menu contains the following options:

- [Download from tester](#)
- [Upload to tester](#)
- [Export to file](#)
- [Email export](#)

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

Functions Menu

Functions Menu



Functions Menu

The Functions Menu contains the following options:

- [Auto Scheduler](#)
- [Add Formal Test Visual Pass](#)
- [Emergency Lighting](#)
- [Fire Alarm](#)
- [Create PATGuard Viewer CD](#)
- [PAT Risk Assessment](#)
- [Universal Risk Assessment](#)

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

Create PATGuard Viewer CD

Create 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 and print their own [Reports](#).

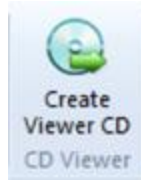
Not all versions of PATGuard 3 can create a Viewer CD, refer to the [PATGuard 3 Versions](#) page for more information.

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



Select a Client or the top level of the database

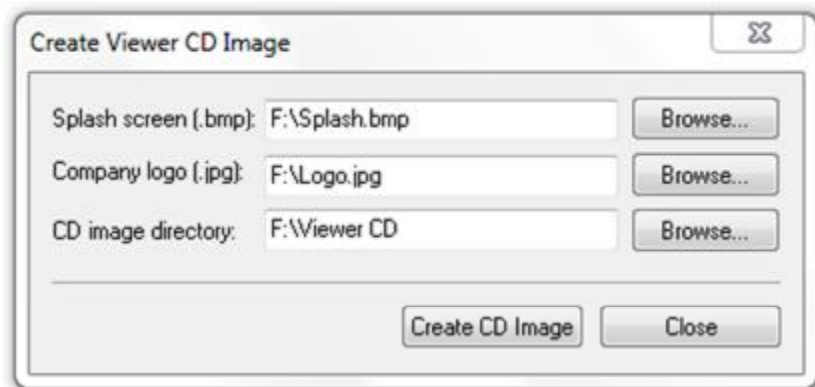
Select the **Create Viewer CD** option from the [Functions Menu](#).



Functions Menu - Create Viewer CD

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

Create Viewer CD Image window

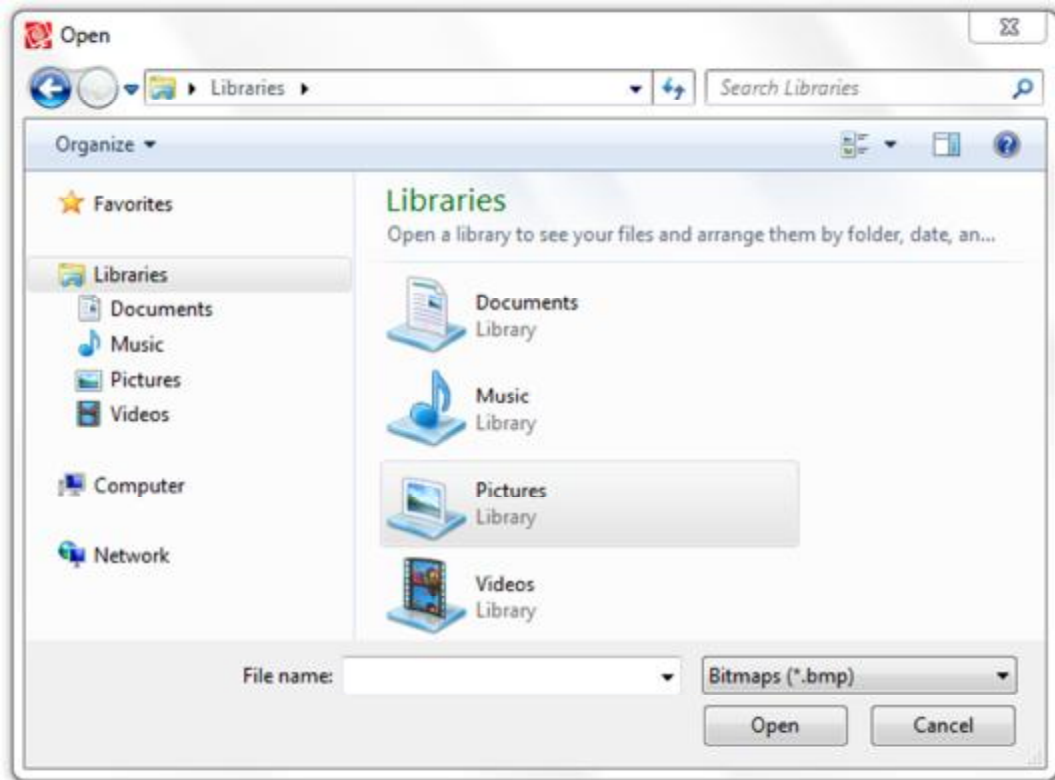


Create Viewer CD Image window

The PATGuard Viewer CD can be customised by changing the Splash Screen and Company Logo. The Splash Screen appears when the PATGuard Viewer is started, and the Company Logo will appear on all [Reports](#) generated with PATGuard Viewer.

Changing Splash Screen

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

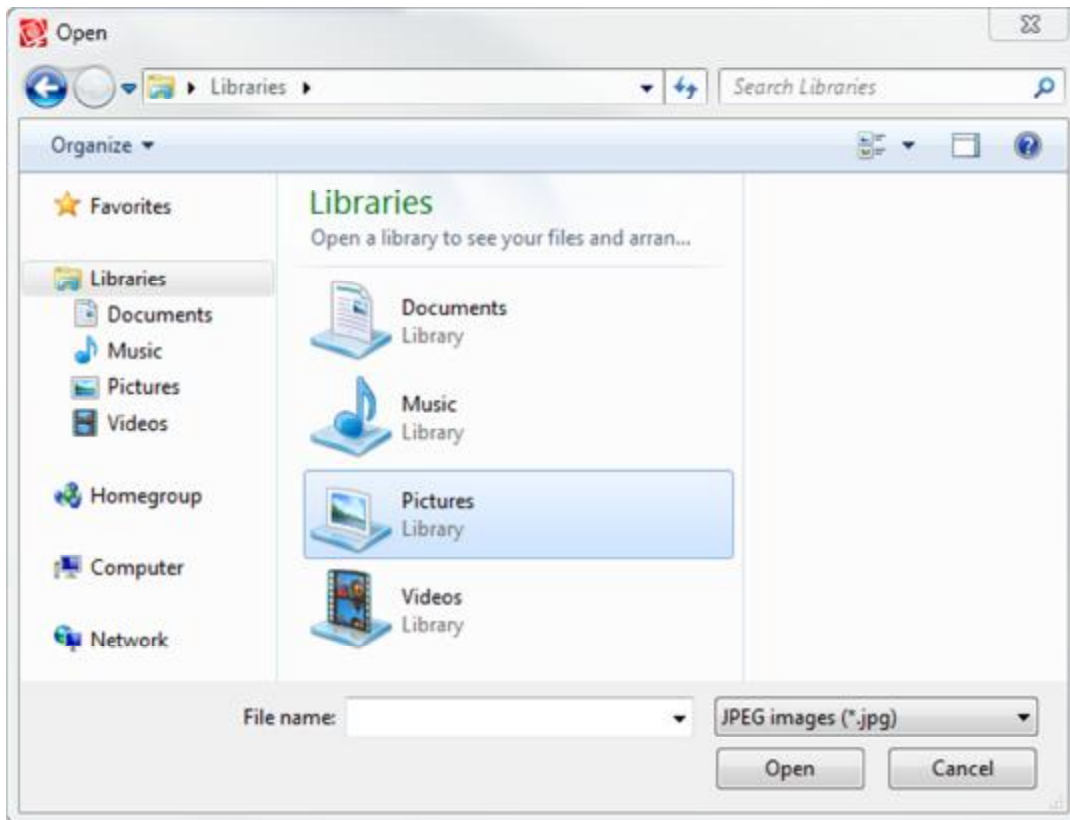


Open Splash Screen window

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

Changing Company Logo

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

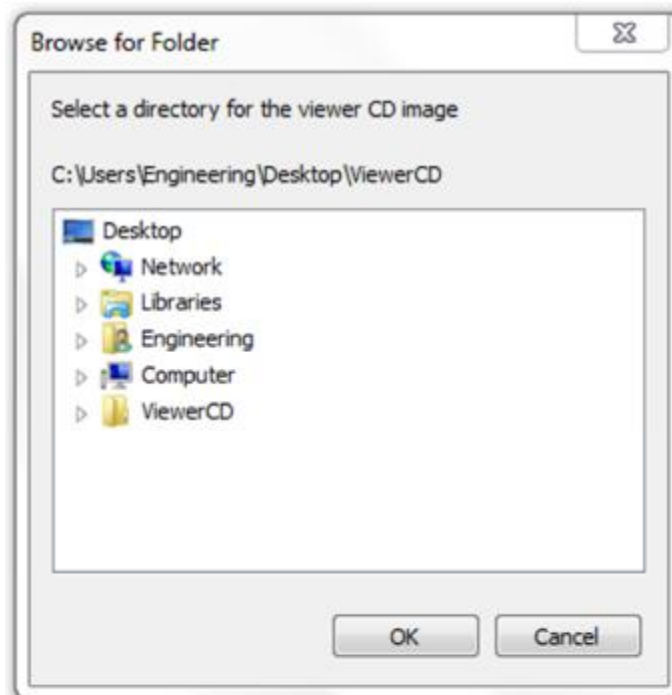


Open Company Logo window

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

Setting CD image directory

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



Browse for CD image directory window

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

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

Creating Viewer CD image

After setting the various Viewer CD options, select **Create CD Image** to generate the Viewer CD files. Once the Viewer CD files have been generated, copy all of the generated files onto a blank CD or DVD using your normal CD creating software program.


It is a good idea to check the Viewer CD has been created correctly by installing on your own PC before sending to a [Client](#).

Add Formal Visual Test Pass

Add Formal Visual Test Pass

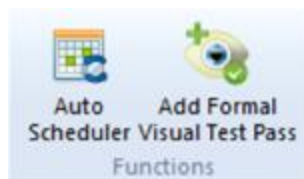
The Add Formal Visual Test Pass feature allows you to add a visual test pass to the [Test Results](#) for one or more [Assets](#).

To add a Formal Visual Test Pass to one or more Assets, make sure you are using the [PAT Testing](#) function and select the Asset or Assets you wish to add a Formal Visual Test Pass to in the [Main Window](#).

Description	Asset ID	Last Tested	Next Test	Last Formal Visual
 2	1			
 Asset	567			
 Asset	12345			16/07/2013
 desc	1278			16/07/2013
 desc	23456			16/07/2013
 desc	123456	16/07/2013	23/07/2013	

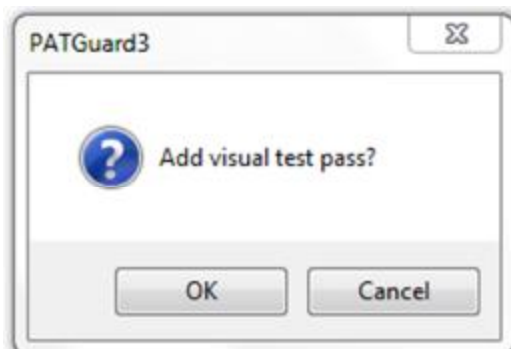
Selecting multiple Assets in the Main Window

Select **Add Formal Visual Test Pass** from the [Functions Menu](#).



Functions Menu - Add Formal Visual Test Pass

You will be prompted for confirmation.

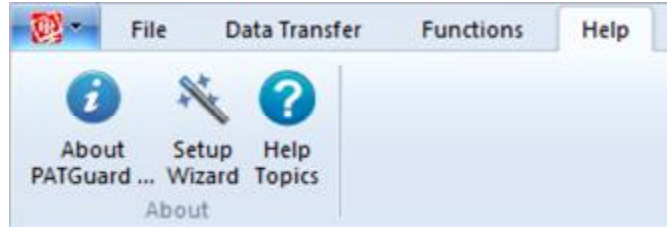


Add Formal Visual Test Pass confirmation

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

Help Menu

Help Menu



Help Menu

The Help Menu contains the following options:

- [About PATGuard 3](#)
- [Setup Wizard](#)
- [Help Topics](#)

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

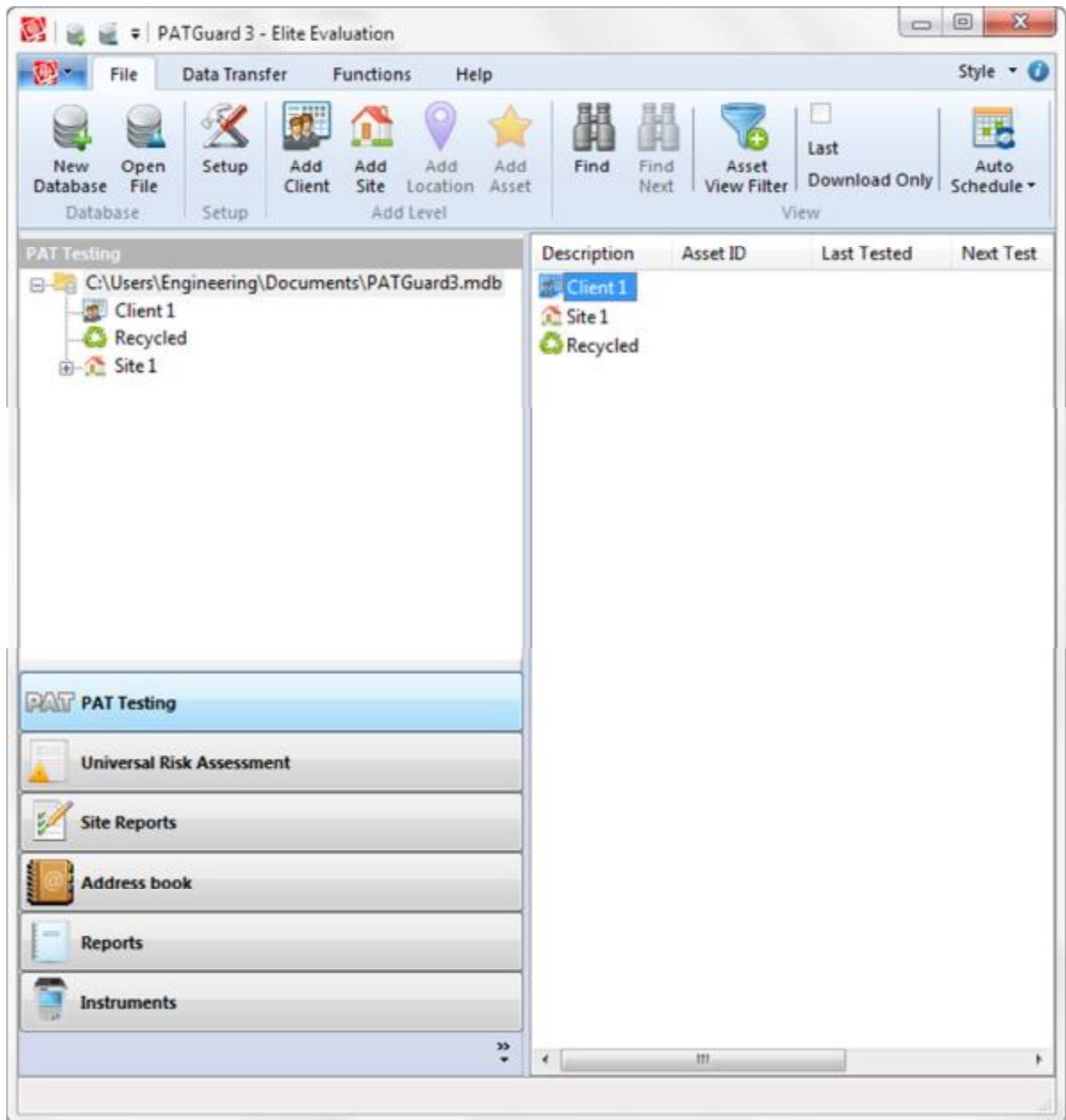
Style Options

Style Options

The appearance of PATGuard 3 can be customised using the Style feature, which can be accessed from the top right corner of the Ribbon. As well as the [Default Style](#) there are a number of [Optional Styles](#) to choose from.

Default Style

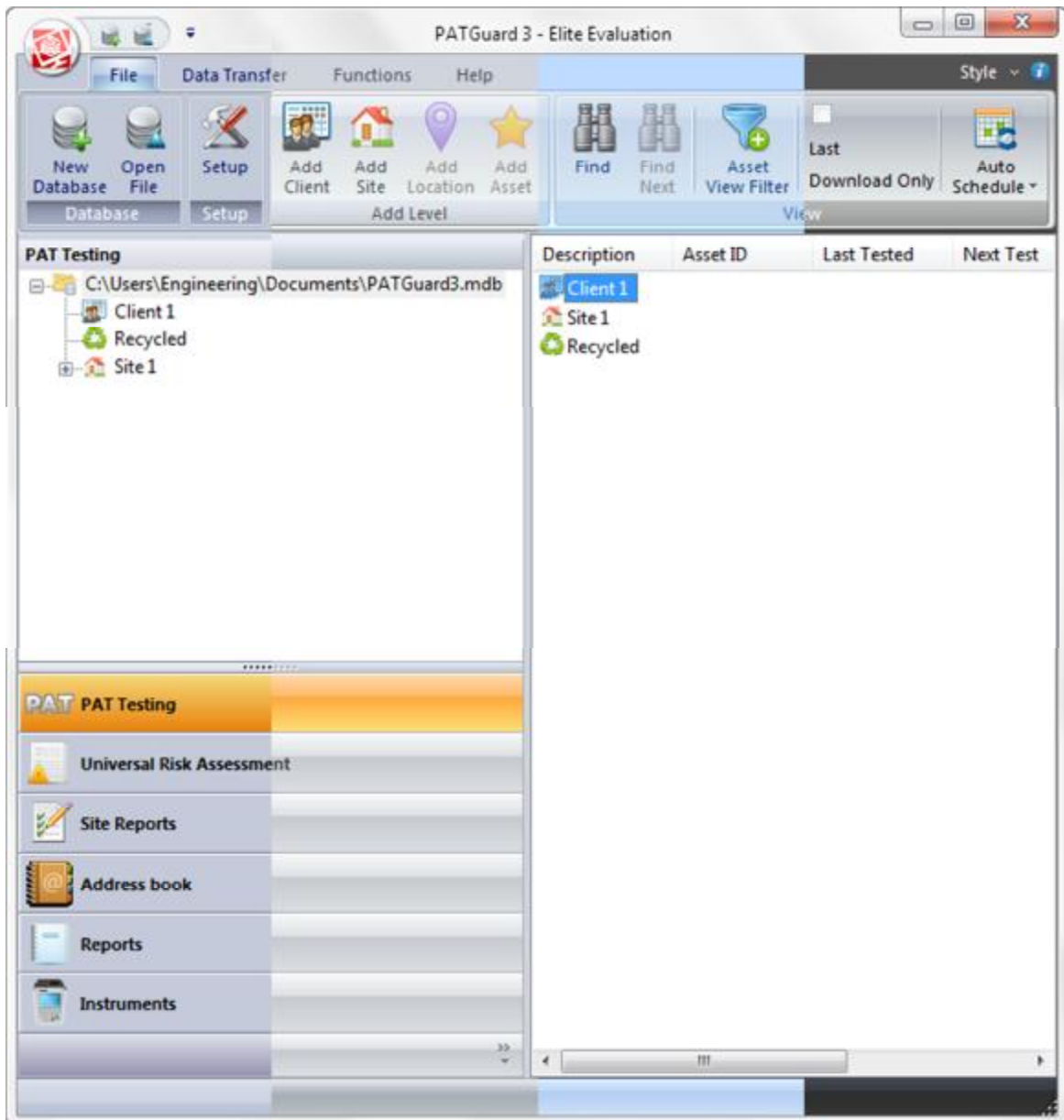
The default style for PATGuard 3 is "Windows 7".



Default "Windows 7" style

Optional Styles

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



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

The Navigation Pane

The Navigation Pane

The Navigation Pane is displayed on the left hand side of the screen. The relative size of the Navigation Pane and [Main Window](#) can be adjusted by clicking and dragging the dividing bar with the mouse.

The Navigation Pane is split into two areas. The bottom area of the Navigation Pane provides access to the main [PATGuard 3 functions](#). The functions displayed in the Navigation Pane can be [customised](#) to meet your requirements.



Functions

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

- [Tree View](#)
- [Reports View](#)
- [Instruments View](#)

Tree View

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



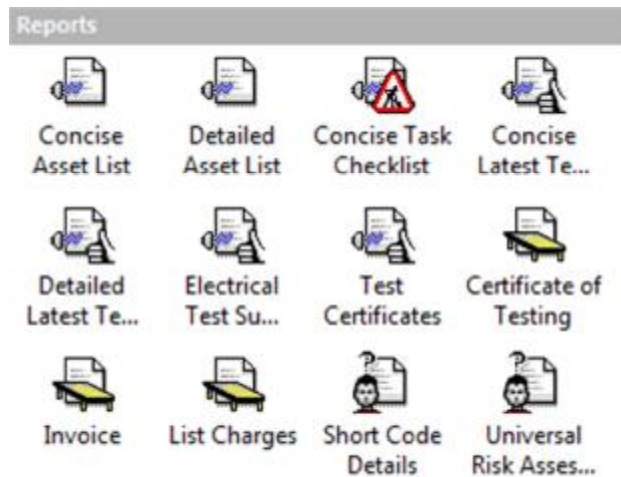
Tree View

The top of the Tree View shows the top level of the database. Underneath this are displayed the configured [Clients](#), [Sites](#) and [Locations](#). Parts of the Tree View can be expanded and collapsed using the + and - icons the left of a Client or Site.

The [Recycle Bin](#) is also shown in the Tree View.

Reports View

The [Reports](#) View displays the list of configured report types in the top of the Navigation Pane.



Reports

Refer to the [Reports](#) section for more information.

Instruments View

The [Instruments](#) View displays a list of configured instrument types in the Navigation Pane.



Instruments

Refer to the [Instruments](#) section for more information.

Customising the Navigation Pane

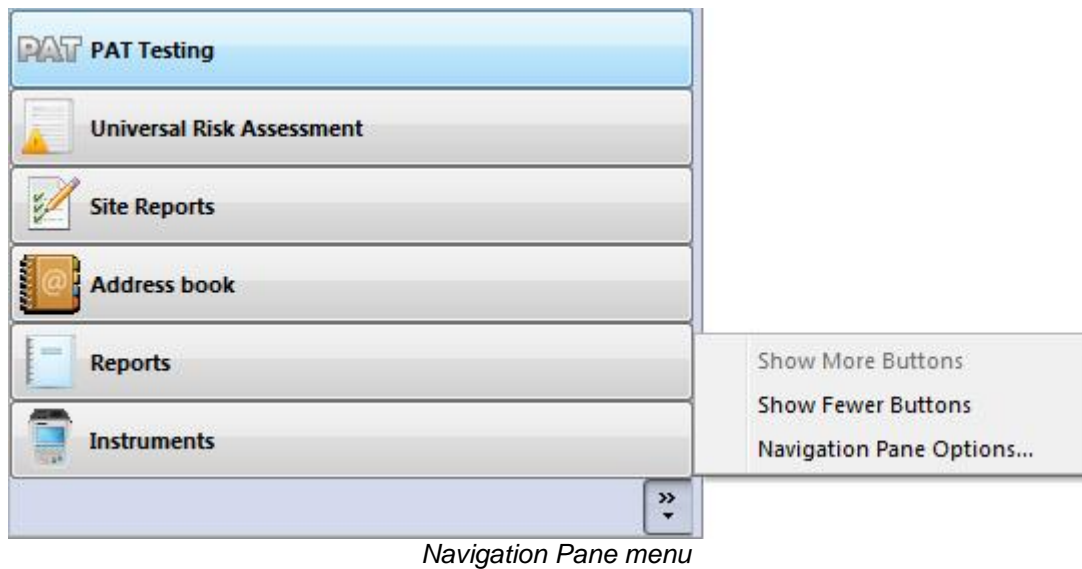
Customising the Navigation Pane

The [Navigation Pane](#) can be customised by [hiding](#), [minimising](#), or [rearranging](#) the various [PATGuard 3 function](#) buttons to better meet your requirements.

Hiding functions

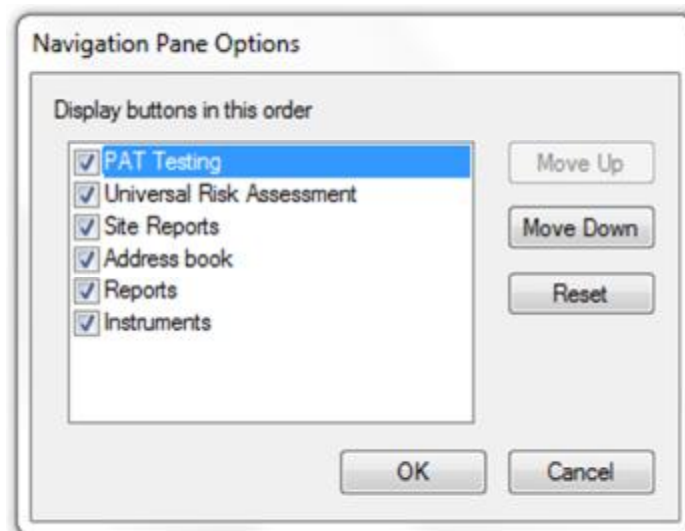
Depending on how you wish to use PATGuard 3 and the functions that you will make use of, you may wish to hide certain [functions](#) from the [Navigation Pane](#). For example, if you do not wish to produce [Site Reports](#) you may choose to hide this function.

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



Navigation Pane menu

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



Navigation Pane Options window

toggling the checkbox next to each function in the Navigation Pane Options window will change whether that function is visible or hidden in the Navigation Pane. In the example below, only the [PAT Testing](#) and [Instruments](#) functions are visible.



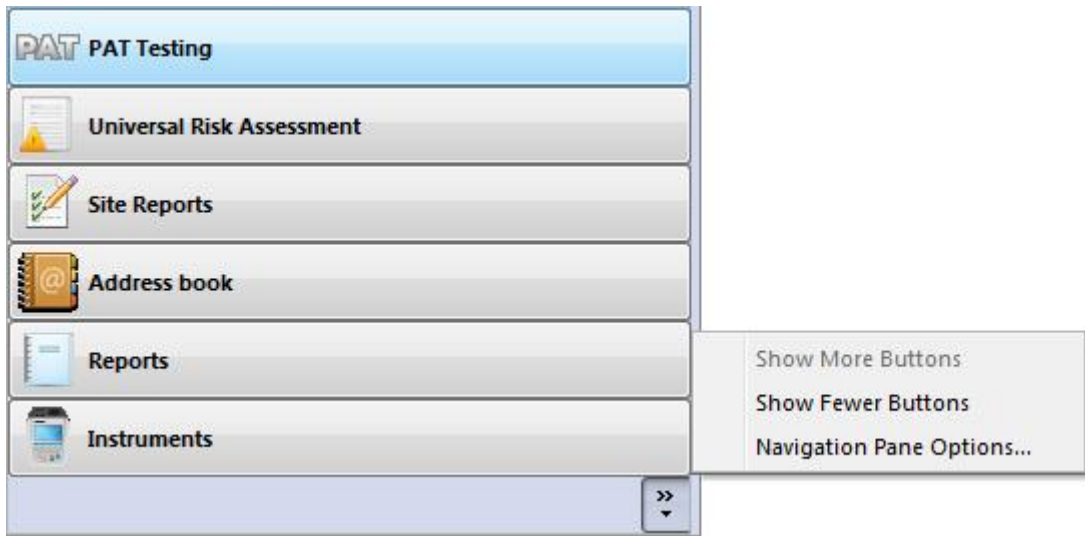
Navigation Pane - only two functions visible

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

Minimising functions

Rather than [hiding functions](#), you may wish to simply minimise the functions you use least often. Minimising functions also provides more space for the database [Tree View](#).

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



Navigation Pane - Function menu

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

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



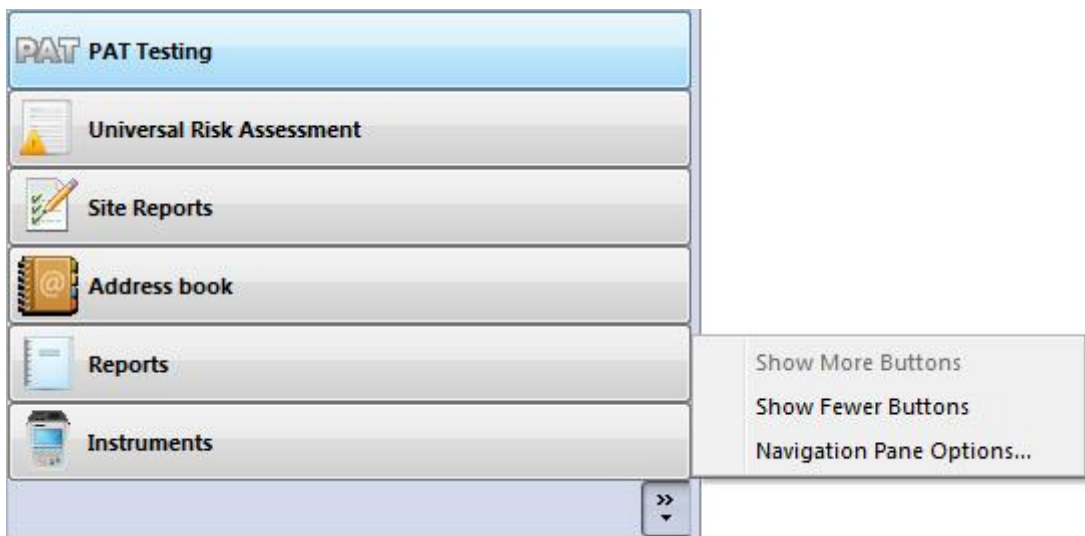
Navigation Pane - All function minimised

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

Rearranging functions

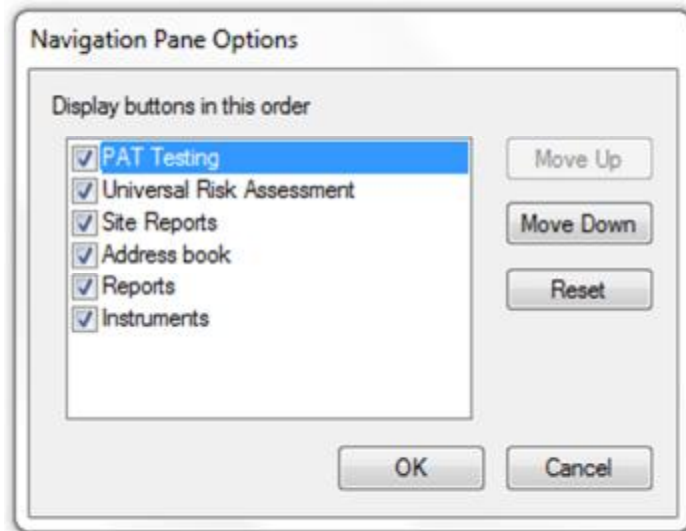
You may wish to change the order that functions appear in the Navigation Pane, either to put the functions in a specific order or to enable you to [minimise](#) particular functions.

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



Navigation Pane menu

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



Navigation Pane Options window

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

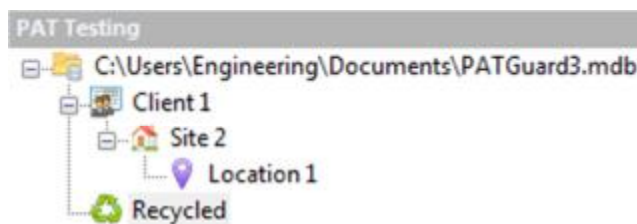
Selecting **Reset** in the Navigation Pane Options window will set all functions to the default order in the Navigation Pane.

Recycle Bin

Recycle Bin

When [Assets](#), [Hazards](#) or [Site Reports](#) are deleted they are moved to the Recycle Bin.

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

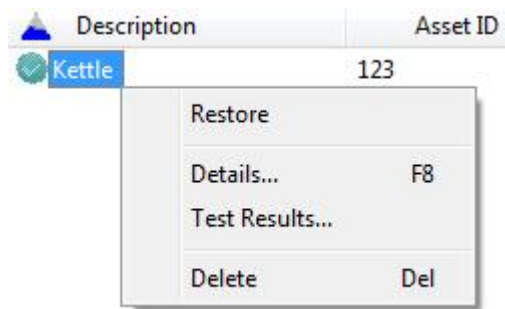


Recycle Bin

The deleted Assets, Hazards and Site Reports will be displayed in the [Main Window](#).

Restoring Assets or Hazards

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



Restore from Recycle Bin

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

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

Main Window

The Main Window







The Main Window is displayed on the right hand side of the screen. The relative size of the [Navigation Pane](#) and Main Window can be adjusted by clicking and dragging the dividing bar with the mouse.

Depending on which of the main [PATGuard 3 functions](#) is selected, the Main window will display one of the following views:

- [Asset View](#)
 - [Filtering the Asset View](#)
 - [Sorting the Asset View](#)
- [Hazard View](#)
- [Site Reports View](#)
- [Personnel View](#)
- [Instruments View](#)

Asset View

The Asset View is shown when the [PAT Testing](#) function is selected. The Assets View displays the list of [Assets](#) for the [Client](#), [Site](#) or [Location](#) selected in the [Tree View](#) on the [Navigation Pane](#).

Description	Asset ID	Last Tested	Next Test	Last Formal Visual	Next Formal Visual
 Kettle	12345			16/07/2013	
 Laptop	123456	16/07/2013	23/07/2013		
 Microwave	1278			16/07/2013	
 Monitor	23456			16/07/2013	
 Toaster	1				
 TV	567				

Asset View

Filtering the Asset View

The [Assets](#) displayed in the [Asset View](#) can be filtered using the [Asset View Filter](#) and [Last Download Only](#) options in the File Menu.

Sorting the Asset View

The [Assets](#) displayed in the [Asset View](#) can be sorted based on the information in each column of the Asset View. To do this, click on the column heading you wish to sort on. The blue triangle will move to that

column to show which column the Assets are being sorted on. To reverse the direction of the sort, click the column heading again. The blue triangle will change direction to indicate the direction of the sort.

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

Description	Asset ID	Last Tested	Next Test	Last Formal Visual	Next Formal Visual
★ TV	567				
✓ Toaster	1				
✓ Monitor	23456			16/07/2013	
✓ Microwave	1278			16/07/2013	
✓ Laptop	123456	16/07/2013	23/07/2013		
✓ Kettle	12345			16/07/2013	

Asset View - Sorted

Hazard View

The Hazard View is shown when the [Universal Risk Assessments](#) function is selected. The Hazard View displays the list of [Hazards](#) for the [Client](#), [Site](#) or [Location](#) selected in the [Tree View](#) on the [Navigation Pane](#).

Description	HazardID
⚠ Dangerous Plug	123
⚠ Trip Hazard	124
⚠ Fall Hazard	125

Hazard View

Site Reports View

The Site Reports View is shown when the [Site Reports](#) function is selected. The Site Reports View displays the list of [Site Reports](#) for the [Client](#), [Site](#) or [Location](#) selected in the [Tree View](#) on the [Navigation Pane](#).

Report ID	Report Type	Site	Location
🔒 1	Emergency Lighting	Site 2	

Site Reports View

Personnel View

The Personnel View is shown when the [Address Book](#) function is selected. The Personnel View displays the [External Personnel](#) for the [Client](#), [Site](#) or [Location](#) selected in the [Tree View](#) on the [Navigation Pane](#). If the top-level of the database is selected, the Personnel View displays the [Internal Personnel](#).



Personnel View

Instruments View

The Instruments View is shown when the [Instruments](#) function is selected. The Instruments View displays the list of Instruments of the type selected in the [Instruments View](#) on the [Navigation Pane](#).



Instruments View

Short-cut Keys

Short-cut Keys

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

New Database	Ctrl + N
Open File	Ctrl + O
Find	Ctrl + F
Help	F1
Rename	F2
Find Next	F3
Reveal Short-cuts	F10
Delete	Del

PATGuard 3 functions

PATGuard 3 functions

The main functions of PATGuard 3 are accessible from the [Navigation Pane](#) and are as follows:

- [PAT Testing](#)
- [Universal Risk Assessment](#)
- [Site Reports](#)
- [Address Book](#)
- [Reports](#)
- [Instruments](#)



PATGuard 3 functions

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

- [Clients](#)
- [Sites](#)

- [Locations](#)

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

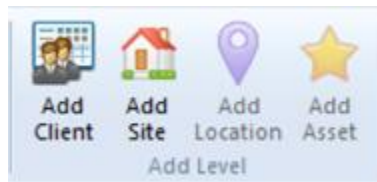
Clients

Clients

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

Adding Clients

To add a client click on the **Add Client** option in the [File Menu](#), as shown below, to bring up the [Client Details](#) window.



Add Client option

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



Add Client option greyed out

If this is the case, click on the top level of the database [Tree View](#) in the [Navigation Pane](#). You will now be able to add a client to the database.



Top level of database Tree View selected

Client Details

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

Client Details window

Personnel responsible for Client

The **Personnel** button in the Client Details window displays details of [Internal Personnel](#) assigned to the client. In this case two Internal Personnel have been assigned to this Client, one in an Administration role and one in a Technical role.

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

Personnel assigned to Client

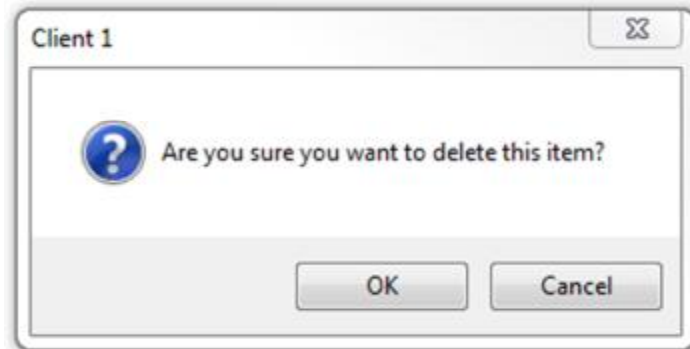
Personnel details are stored in the [Address Book](#). See [Adding Internal Personnel](#) for more information on how to add Internal Personnel and assign them to particular Clients.

Changing Client Details

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

Deleting Clients

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



Delete Client Confirmation

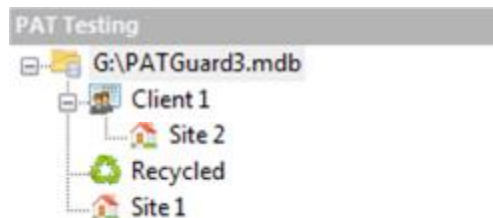
CAUTION: deleting a Client will also delete any locations, assets and results associated with them.

Sites

Sites

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

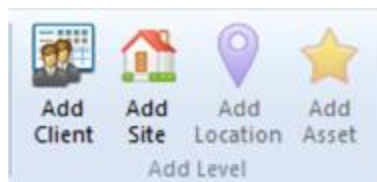
Depending on your individual requirements, for example whether you are a contractor or perform in-house testing only, sites can be created at the top level of the database or can be associated with a particular [Client](#) and appear underneath that Client in the [Tree View](#) in the [Navigation Pane](#).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



Two types of Site

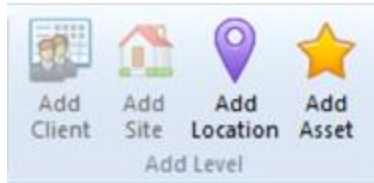
Adding Sites

To add a Site click on the **Add Site** option in the [File Menu](#), as shown below, to bring up the [Site Details](#) window.



Add Site option

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



Add Site option greyed out

If this is the case, make sure that either the top level of the database or a particular Client is selected within the [Tree View](#) in the [Navigation Pane](#). You will now be able to add a Site to the database.

Site Details

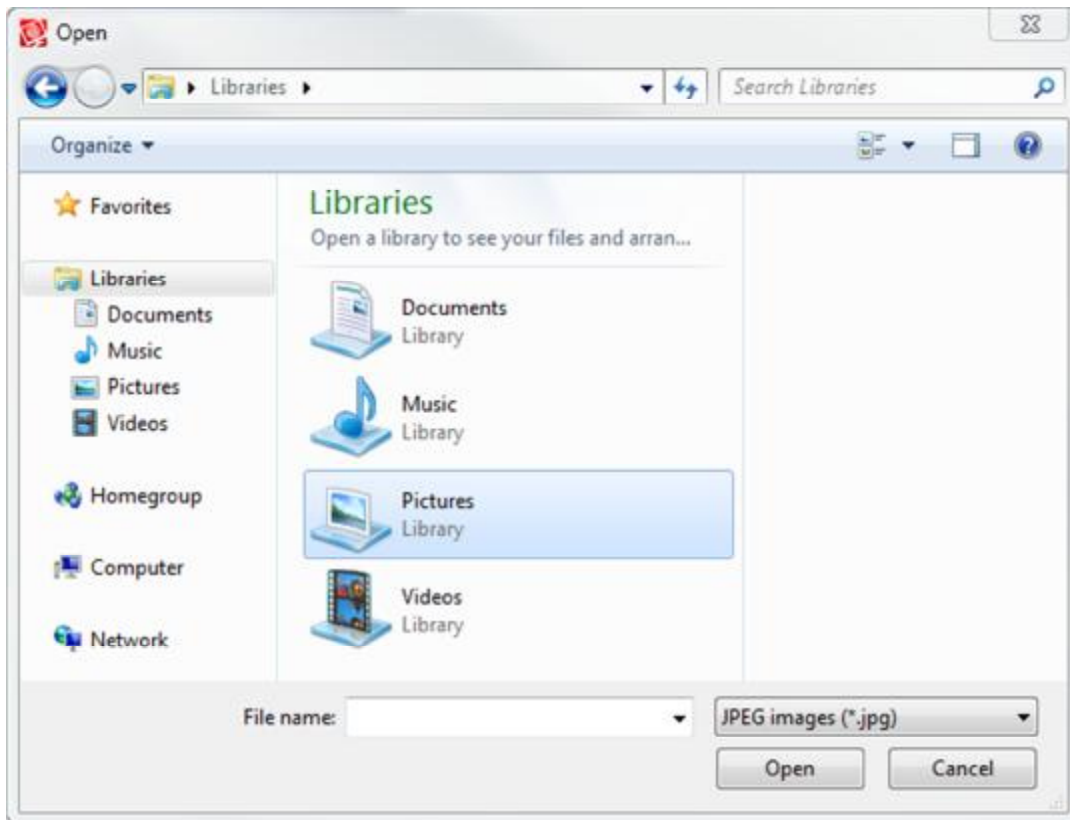
The Site Details window allows you to view, add or amend the details of a Site, including the name of the Site, the [Client](#) (this will be pre-populated if you created the site under a Client in the [Tree View](#)), address and contact details and any other notes you would like to add about the Site.

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

Site Details window

Attaching photos to Site Details

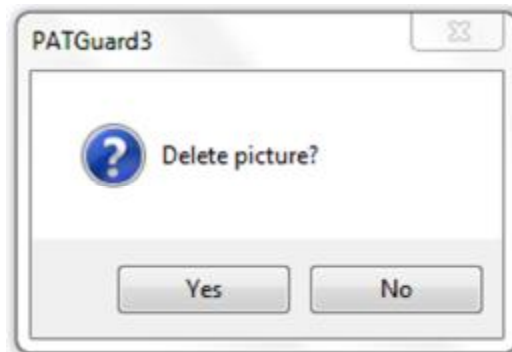
You can also attach photos of the Site to the Site Details. To do this, click the **Add Attachment** button in the Site Details window. This will open the Open Photo window.



Open Photo window

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

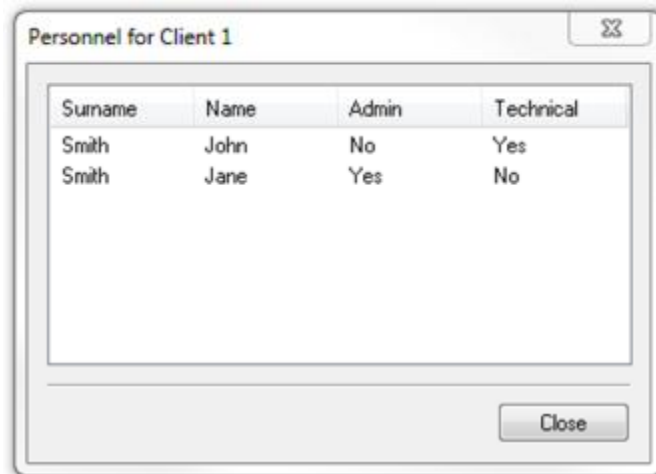
You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.



Delete Picture Confirmation

Personnel responsible for Site

The **Personnel** button in the [Site Details](#) window displays details of [Internal Personnel](#) responsible for the Site. In this case two Internal Personnel have been assigned to this Site, one in an Administration role and one in a Technical role.



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

Personnel assigned to Client

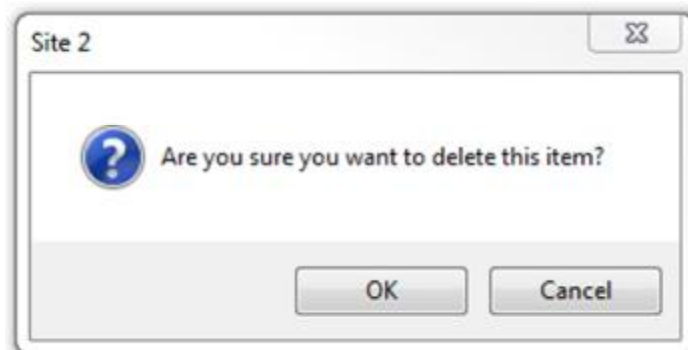
Personnel details are stored in the [Address Book](#). See [Adding Internal Personnel](#) for more information on how to add Internal Personnel and assign them to particular Clients.

Changing Site Details

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

Deleting Sites

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



Delete Site Confirmation

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

Locations

Locations

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

The exact meaning of a Location can change depending on your individual requirements. If a [Site](#) represents a single building, for example, a Location could be a room within that building. If a Site has multiple buildings, a Location could be a specific building on that Site.

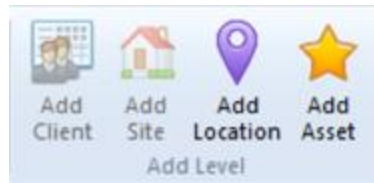
Adding Locations

To add a Location, first select the [Site](#) that the Location is to be created at in the [Tree View](#) in the [Navigation Pane](#).



Select a Site

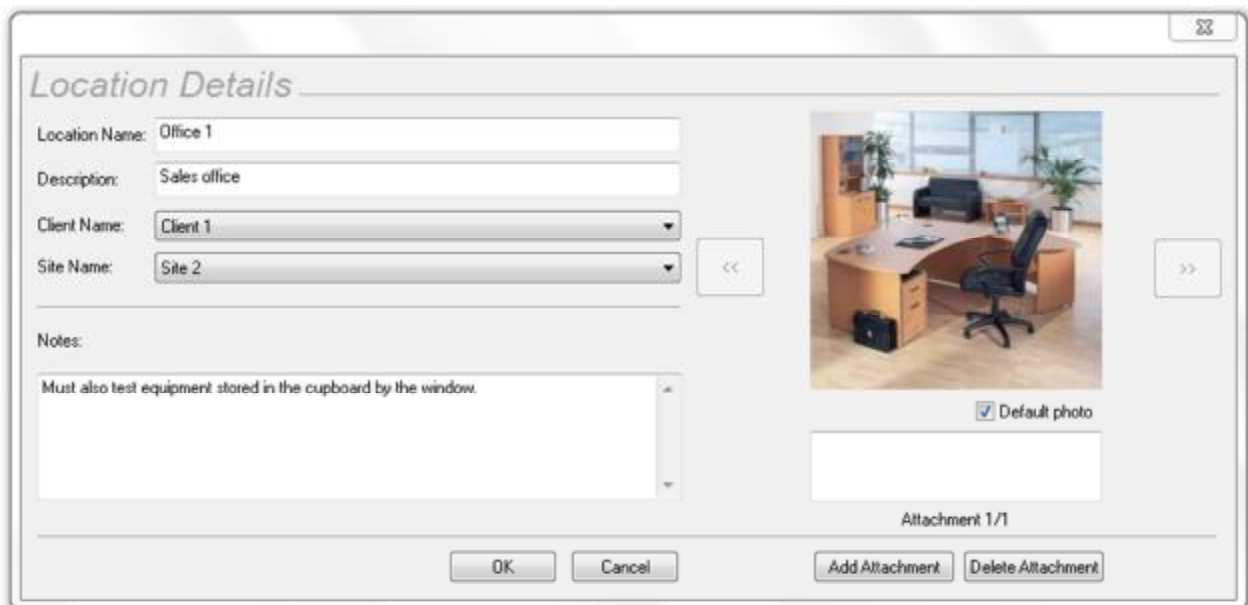
To add the Location click on the **Add Location** option in the [File Menu](#), as shown below, to bring up the [Location Details](#) window.



Add Location option

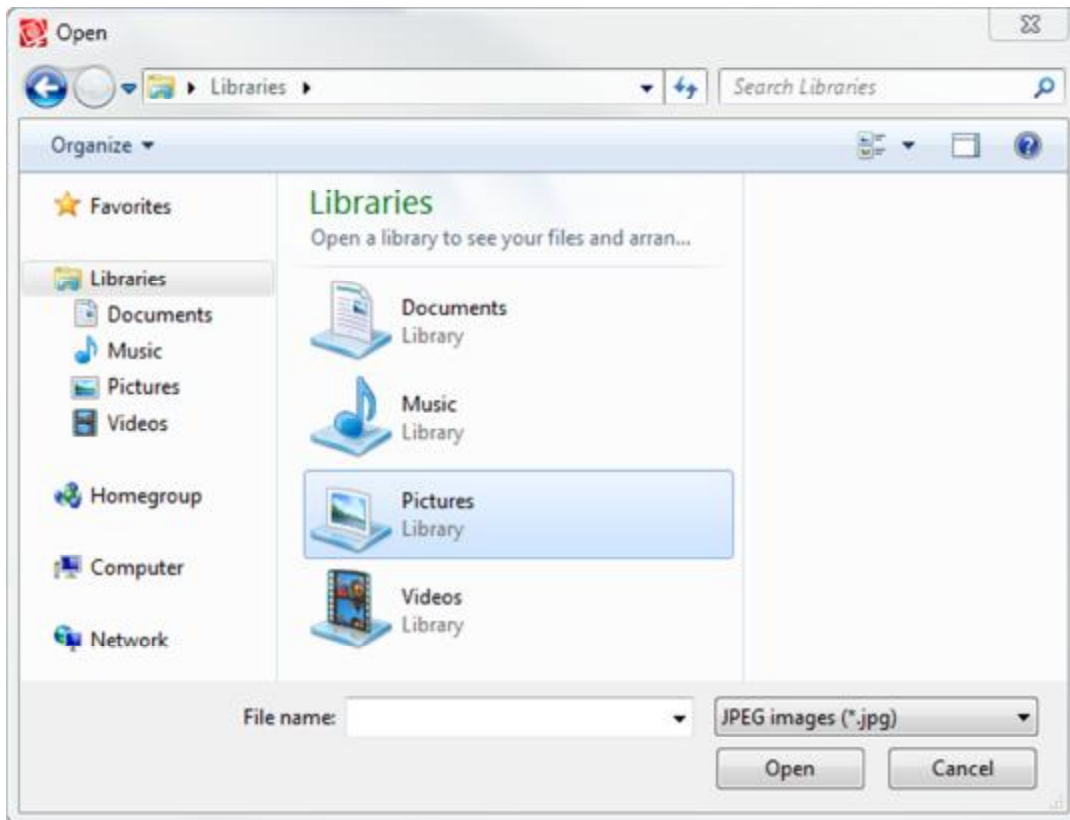
Location Details

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



Attaching photos to Location Details

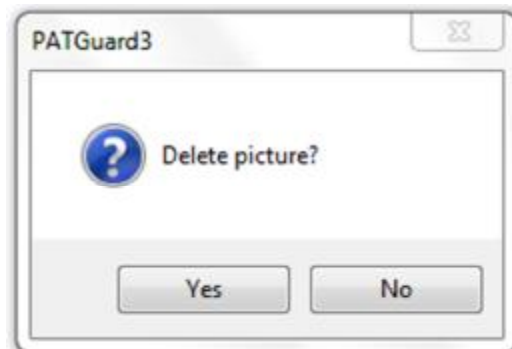
You can also attach photos of the Location to the Location Details. To do this, click the **Add Attachment** button in the Location Details window. This will open the Open Photo window.



Open Photo window

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

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



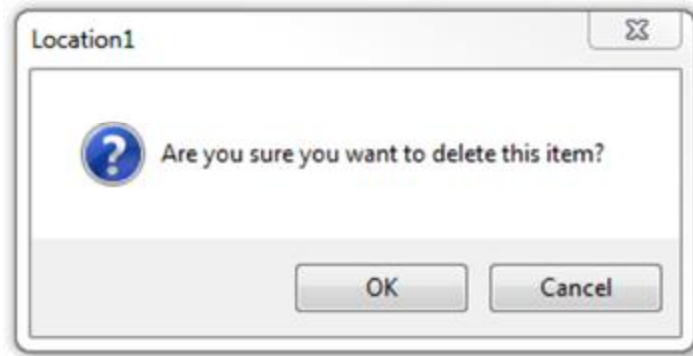
Delete Picture Confirmation

Changing Location Details

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

Deleting Locations

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



Delete Location Confirmation

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

PAT Testing

PAT Testing

The PAT Testing function of PATGuard 3, which is accessible from the [Navigation Pane](#), allows you to view, add and amend details of [Assets](#), manually add [Test Results](#) and perform [PAT Risk Assessments](#).



Navigation Pane - PAT Testing

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

Description	Asset ID	Last Tested	Next Test	Last Formal Visual	Next Formal Visual
Computer	2	04/07/2013	04/07/2014	04/07/2013	04/07/2014
IEC LEAD	21	26/10/2000	26/10/2001	26/10/2000	26/10/2001
KETTLE	22	26/10/2000	26/10/2001	26/10/2000	26/10/2001
MICROWAVE	23	26/10/2000	26/10/2001	26/10/2000	26/10/2001

Main Window - Asset View

PAT Testing functions

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

- [Assets](#)
- [Test Results](#)
- [PAT Risk Assessment](#)

Related activities

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

- [Clients](#)
- [Sites](#)
- [Locations](#)

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

Assets

Assets

Assets refer to physical items to be tested. PATGuard 3 allows you to add Assets to a particular [Site](#) or [Location](#), to manually [add test results](#), and also to add [PAT Risk Assessments](#) to those Assets.

Viewing and Filtering Assets

To view the [Asset Details](#) for a particular Asset, double-click the Asset in the [Main Window](#), or select the Asset and press **F8**. To review [Test Results](#) for an Asset, either open the [Asset Details](#) window or right click the Asset and click **Test Results...** You can also print an individual [Test Certificate](#) from this menu. See also [Changing Asset Details](#) and [Deleting Assets](#).

You can also filter Assets by certain criteria. *For more information on filtering Assets, refer to the [Find](#), [Asset View Filter](#) and [Last Download Only](#) pages.*

Manually adding Assets

To add an Asset, first select the [Site](#) or [Location](#) that the Asset is to be created at in the [Tree View](#) in the [Navigation Pane](#).



Select a Site or Location

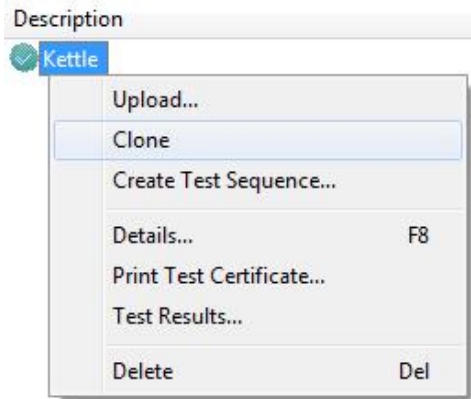
To add the Asset click on the **Add Asset** option in the [File Menu](#), as shown below, to bring up the [Asset Details](#) window.



Add Asset option

Cloning Assets

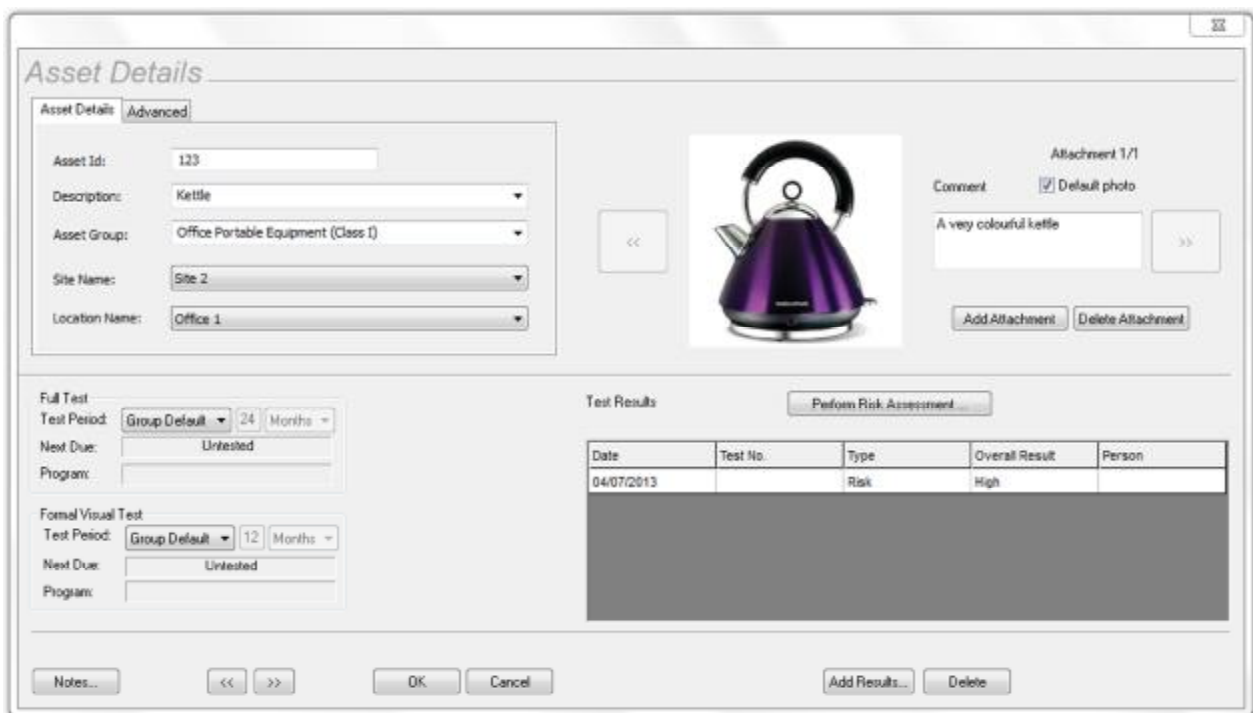
A quick way to duplicate an Asset, which is useful if you have multiple similar items to add, is to right click on the Asset in the [Main Window](#) and select **Clone**. This will create a copy of the Asset, but without any [Test Results](#).



Clone Asset

Asset Details

The Asset Details window allows you to view, add or amend details of the Asset, including Asset ID, Description and [Asset Group](#). The [Site](#) and [Location](#) will already be populated.



Asset Details window

The Asset Details window can also be viewed by double-clicking the Asset in the [Main Window](#), by selecting the Asset and pressing **F8**, or by right-clicking on the Asset and selecting **Details...**

Advanced Asset Details

The Advanced Asset Detail tab allows you to add additional information about an Asset, including the Make, Model and Serial Number.

The screenshot shows the 'Asset Details' window with the 'Advanced' tab selected. The fields are as follows:

Make:	Morphy Richards
Model:	Purple Plus
Serial No.:	n/a
Test Code 1:	
Test Code 2:	

Asset Detail Window - Advanced tab

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

Retest Period

The Retest Period for Full Test and Formal Visual Test can also be set in the [Asset Details](#) window.

The screenshot shows the 'Retest period' section of the 'Asset Detail Window'. It contains two sections: 'Full Test' and 'Formal Visual Test'.

Full Test	
Test Period:	Group Default 24 Months
Next Due:	Untested
Program:	

Formal Visual Test	
Test Period:	Group Default 12 Months
Next Due:	Untested
Program:	

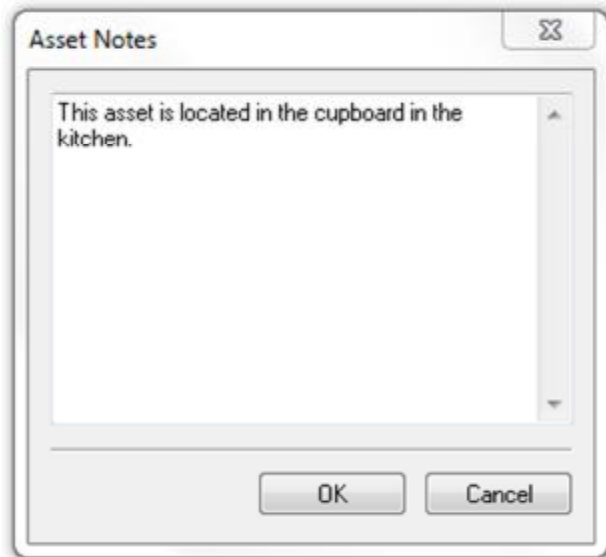
Asset Detail Window - Retest period

The options for Retest Period include:

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

Asset Notes

You can add notes about an Asset to the Asset Details. To do this, click the **Notes...** button in the [Asset Details](#) window. This will open the Asset Notes window.



Asset Notes window

Manually adding Test Results

To manually add Test Results to an Asset, click on **Add Results...** in the [Asset Details](#) window.

See the [Test Results](#) page for more information on manually adding Test Results to an Asset.

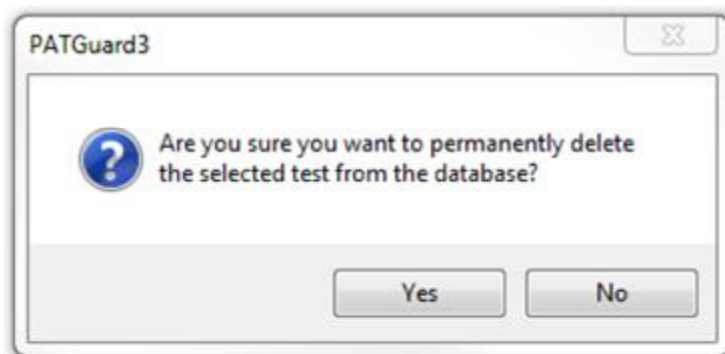
Adding a PAT Risk Assessment

To add a PAT Risk Assessment to the Asset, click on **Perform Risk Assessment...** in the [Asset Details](#) window.

See the [PAT Risk Assessment](#) page for more information on adding a PAT Risk Assessment to an Asset.

Deleting Test Results or PAT Risk Assessments

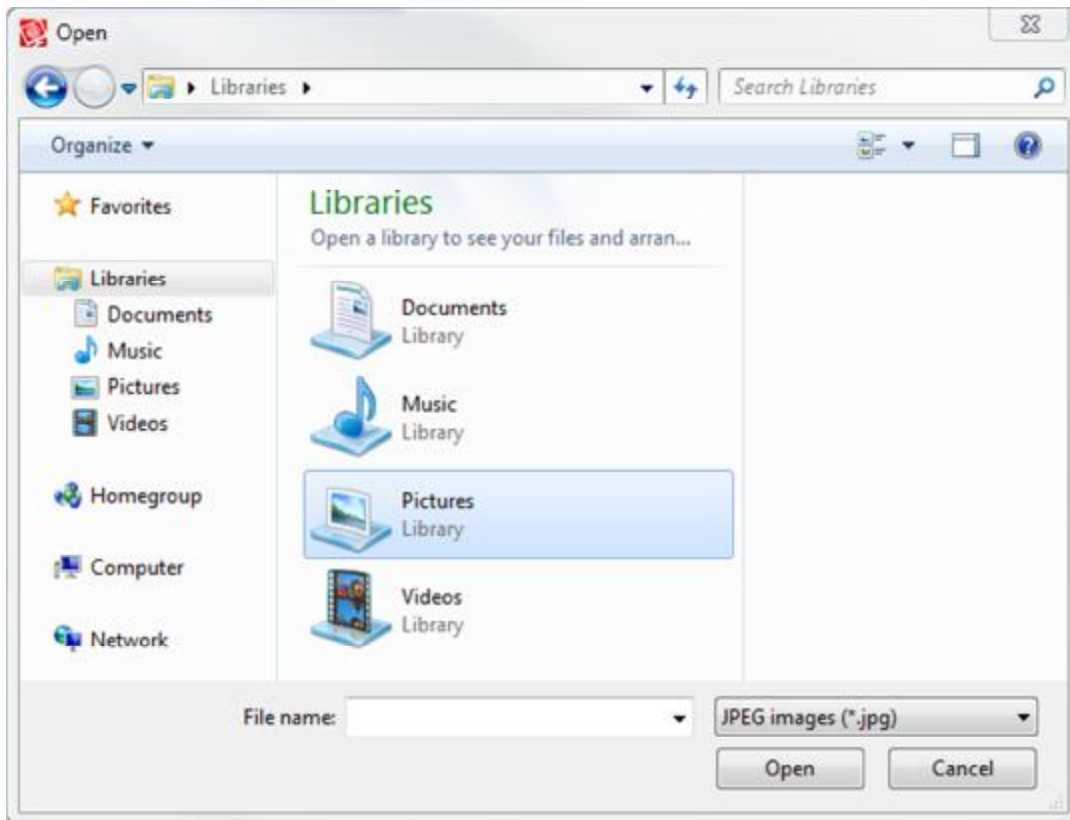
To delete Test Results or a PAT Risk Assessment associated with a Asset, select the row containing the test results or PAT Risk Assessment in the [Asset Details](#) window and hit the **Delete** button. You will be prompted for confirmation.



Delete test results/PAT Risk Assessment

Attaching photos to Asset Details

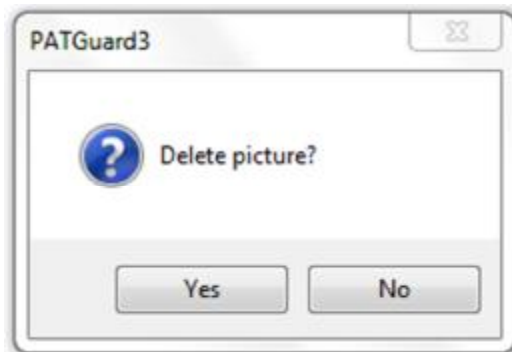
You can attach photos of the Asset to the Asset Details. To do this, click the **Add Attachment** button in the [Asset Details](#) window. This will open the Open Photo window.



Open Photo window

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

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



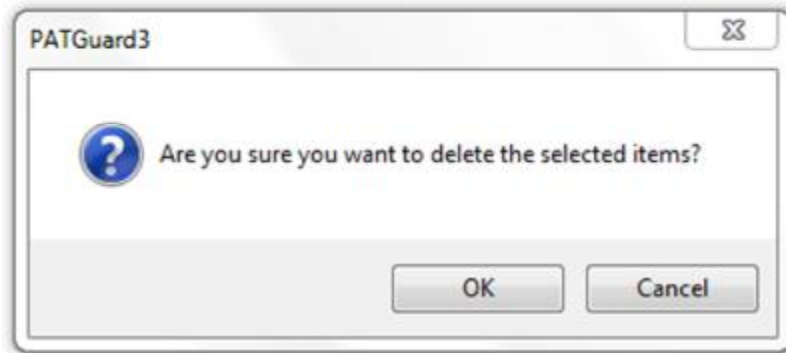
Delete Picture Confirmation

Changing Asset Details

Asset details can be changed by double-clicking the Asset in the [Main Window](#), by selecting the Asset and pressing **F8**, or by right-clicking on the Asset and selecting **Details...** This will bring up the [Asset Details](#) window.

Deleting Assets

Assets can be deleted by selecting them in the [Main Window](#), and pressing **Delete**. You will be prompted for confirmation.



Delete Asset Confirmation

Deleted Assets can be restored from the [Recycle Bin](#).

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

Test Results

Test Results

Test Results are linked to individual [Assets](#) and store details of visual inspections, electrical tests and [PAT Risk Assessments](#) associated with that Asset.

View Test Results

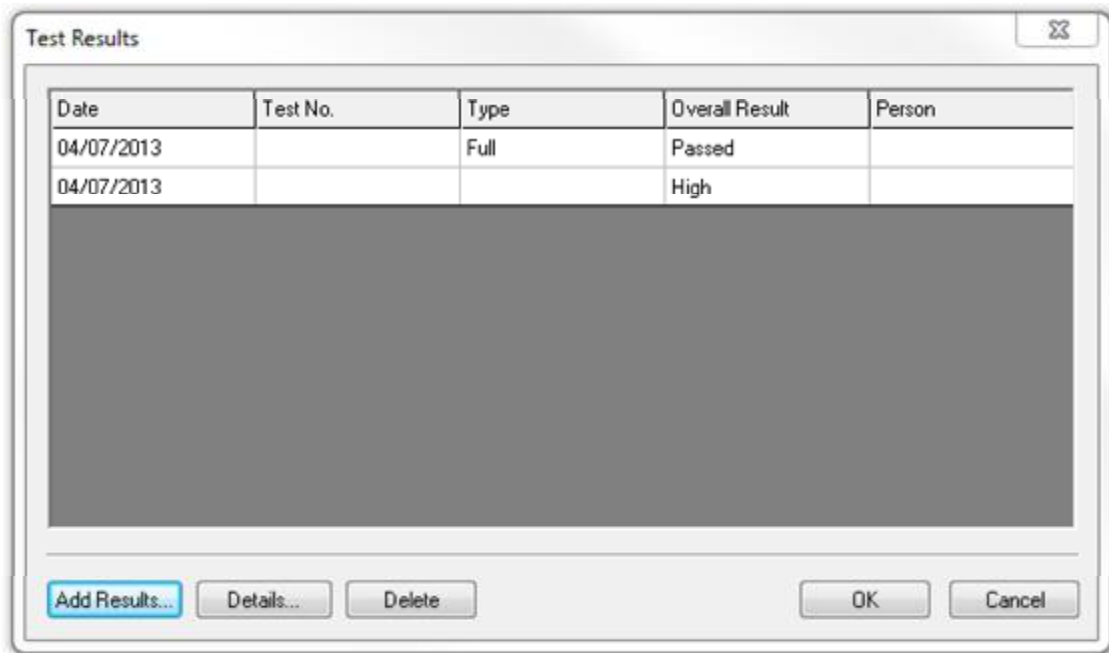
To view Test Results for an Asset, open the [Asset Details](#) window by double-clicking the Asset in the [Main Window](#), by selecting the Asset and pressing **F8**, or by right-clicking on the Asset and selecting **Details...** Test Results for the Asset are displayed in this window. See also [Changing Test Results](#) and [Deleting Test Results](#).

 The "Asset Details" window shows information for an asset with ID 123, described as a "Kettle". It includes fields for Asset Group, Site Name, and Location Name. There are sections for "Full Test" and "Formal Visual Test" with dropdown menus for test periods and "Next Due" dates. A "Test Results" table is visible, showing a single entry for a risk assessment on 04/07/2013. The table has columns for Date, Test No., Type, Overall Result, and Person.

Date	Test No.	Type	Overall Result	Person
04/07/2013		Risk	High	

Asset Details window

Alternatively, right click on the Asset in the [Main Window](#) and click **Test Results...** to open the Test Results window and view only the Test Results and not the full [Asset Details](#).



Test Results window

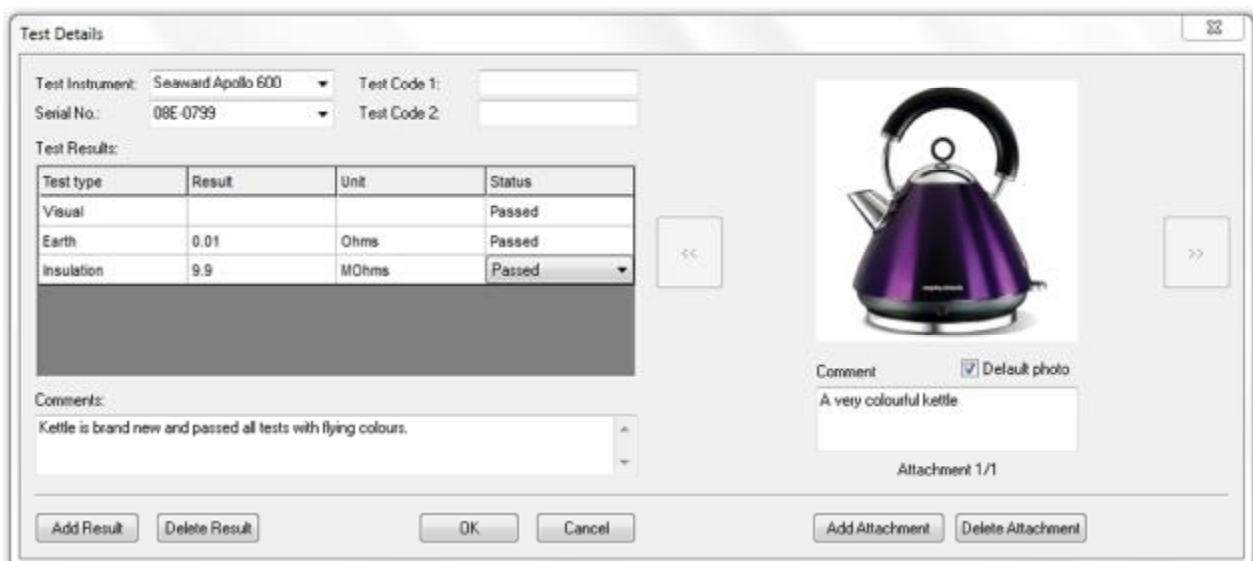
The Test Results displayed in either the [Asset Details](#) or Test Results windows can be details of visual inspections, electrical tests and [PAT Risk Assessments](#) associated with that Asset. Double-clicking a Test Result in either window will open the [Test Details](#) window or the [PAT Risk Assessment](#) window, depending on the type of Test Result.

Manually adding Test Results

Clicking **Add Results...** in either the Asset Details or Test Results windows will open a blank [Test Details](#) window for you to manually enter Test Results.

Test Details window

The Test Details window allows you to view, add or amend details of individual Results for an Asset. For electrical tests, you can select the [Test Instrument](#) used to associate with the Results.



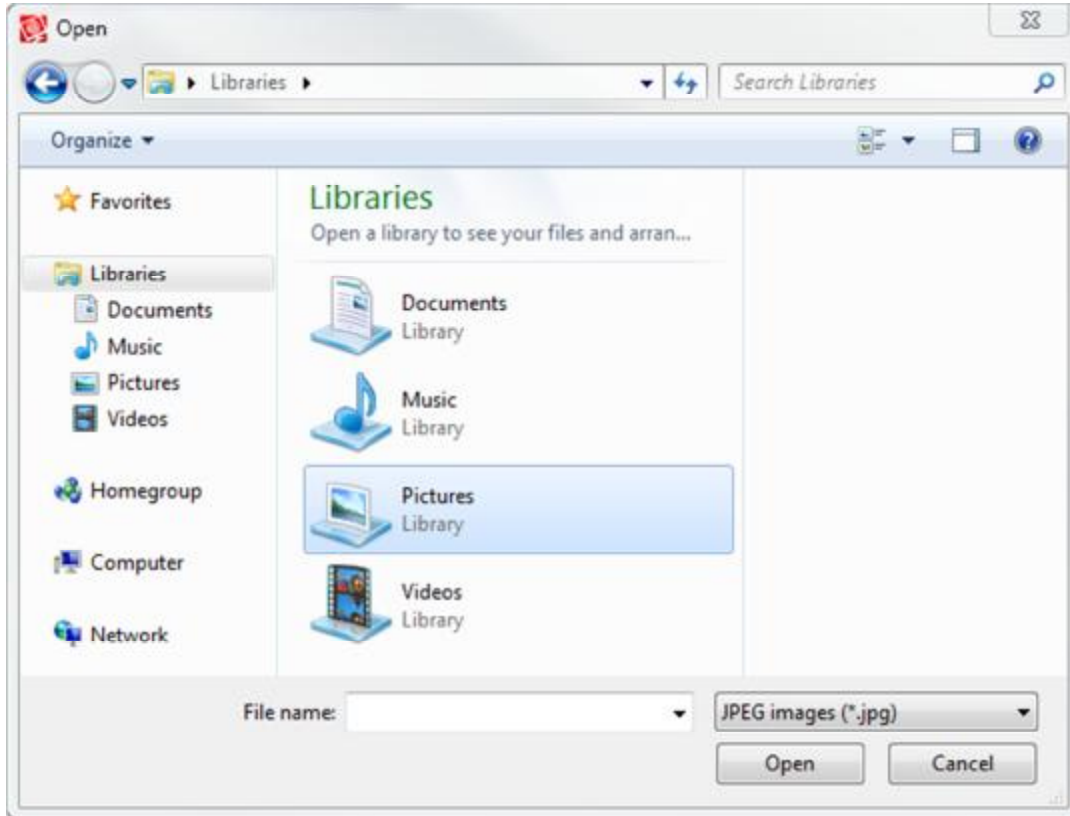
Test Details window

To add a Result, click **Add Result** in the Test Details window to add a new Result. Select the Test type from the available options and enter the Result and Status (whether the Test was a Pass or Fail, for

example). You can also select the units, although this will normally be automatically selected for you. Continue adding results using the **Add Result...** button until you have entered the complete sequence of tests. If you need to delete a row, select the row and click the **Delete Result**

Attaching photos to a Test Result

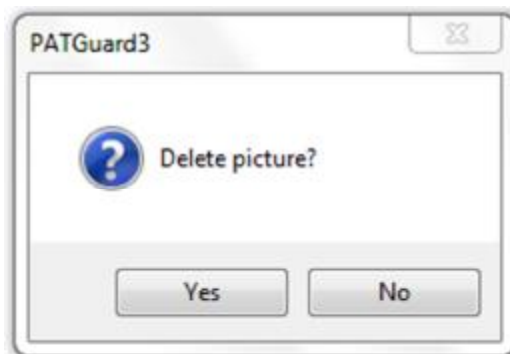
You can also attach photos of the Asset to the Test Result. To do this, click the **Add Attachment** button in the Test Details window. This will open the Open Photo window.



Open Photo window

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

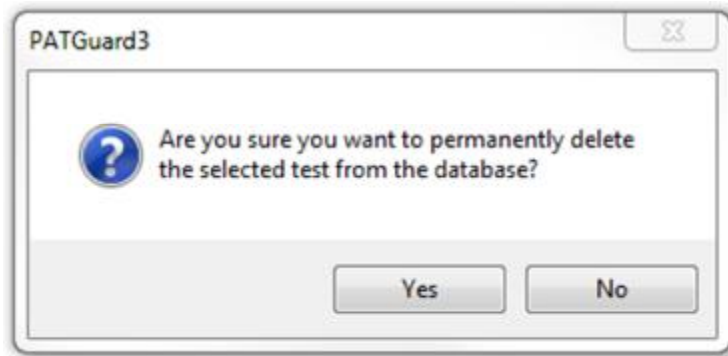
You can scroll through the attached photos using the << and >> buttons and delete attached photos using the **Delete Attachment** button. You will be prompted for confirmation.



Delete Picture Confirmation

Delete Result

To delete a Test Result, select the row containing the test results or PAT Risk Assessment in the [Test Details](#) window and hit the **Delete Result...** button. You will be prompted for confirmation.



Delete Test Results

PAT Risk Assessment

PAT Risk Assessment

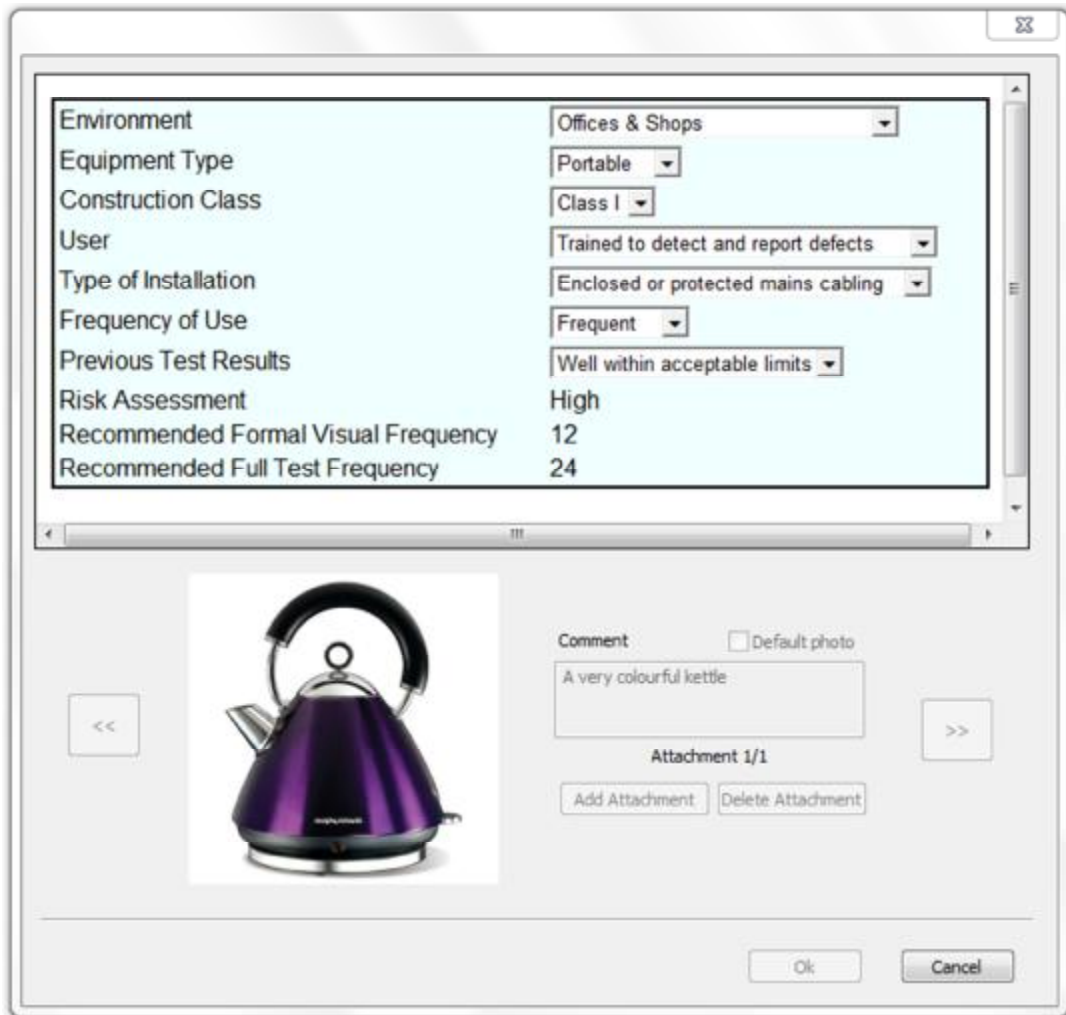
PAT Risk Assessments can be performed directed from the [Asset Details](#) window by clicking the **Perform Risk Assessment...** button. They can also be performed by clicking on an [Asset](#) in the [Main Window](#) and selecting **PAT Risk Assessment** from the [Function Menu](#), as shown below, to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



PAT Risk Assessment option

PAT Risk Assessment window

The PAT Risk Assessment window allows you to view or complete a PAT risk assessment for an [Asset](#). Entering details about the [Asset](#) and the environment at the [Site](#) or [Location](#) will automatically calculate a recommended [Retest Period](#).



The screenshot shows the 'PAT Risk Assessment' window. It features a table of assessment criteria with dropdown menus and text input fields. Below the table is a photo of a purple kettle, a comment field with the text 'A very colourful kettle', and buttons for 'Add Attachment' and 'Delete Attachment'. The window also has 'Ok' and 'Cancel' buttons at the bottom right.

Environment	Offices & Shops
Equipment Type	Portable
Construction Class	Class I
User	Trained to detect and report defects
Type of Installation	Enclosed or protected mains cabling
Frequency of Use	Frequent
Previous Test Results	Well within acceptable limits
Risk Assessment	High
Recommended Formal Visual Frequency	12
Recommended Full Test Frequency	24

Comment Default photo
A very colourful kettle

Attachment 1/1

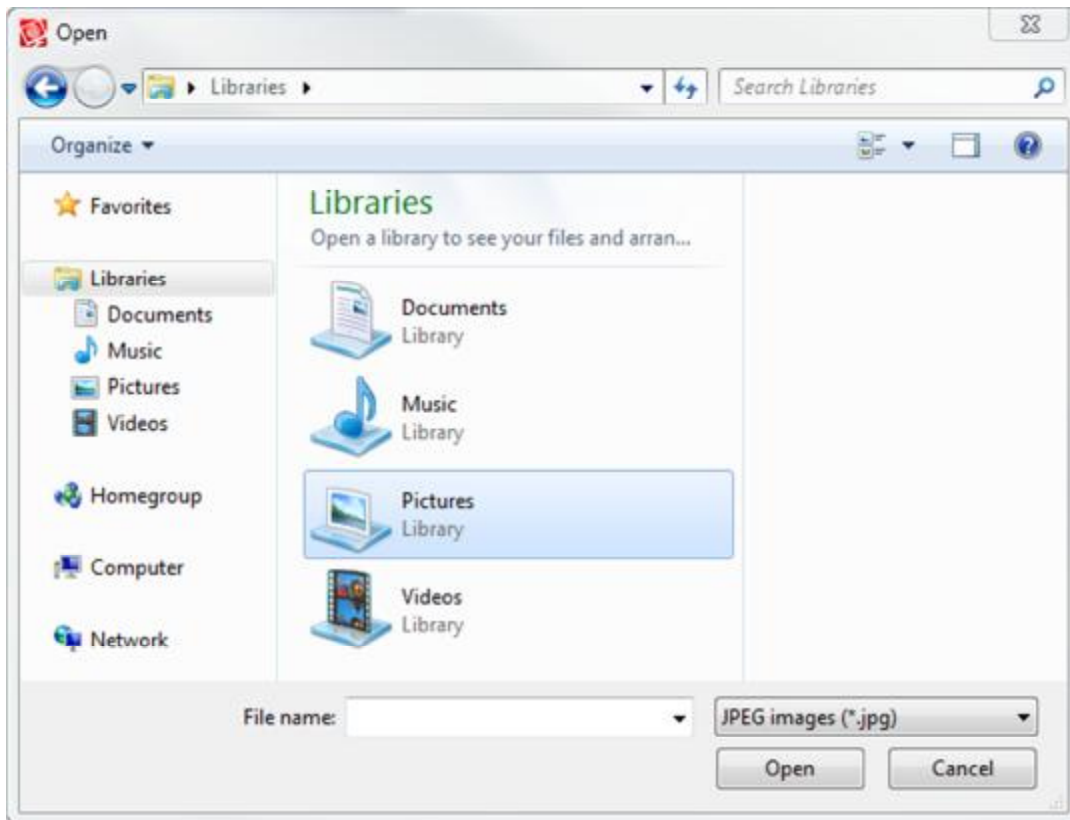
Add Attachment Delete Attachment

Ok Cancel

PAT Risk Assessment window

Attaching photos to a PAT Risk Assessment

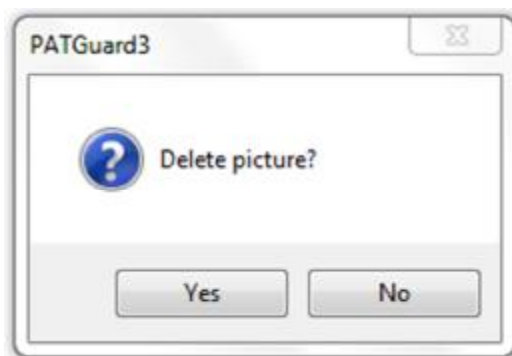
You can also attach photos of the Asset to the PAT Risk Assessment. To do this, click the **Add Attachment** button in the PAT Risk Assessment window. This will open the Open Photo window.



Open Photo window

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

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

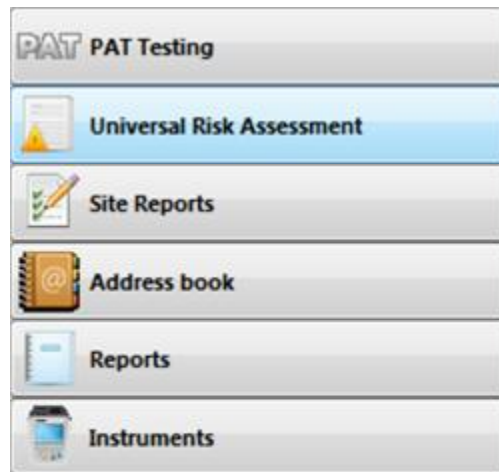


Delete Picture Confirmation

Universal Risk Assessment

Universal Risk Assessment

The Universal Risk Assessment function of PATGuard 3, which is accessible from the [Navigation Pane](#), allows you to view, add and amend details of [Hazards](#) and perform [Universal Risk Assessments](#).



Navigation Pane - Universal Risk Assessment

When the Universal Risk Assessment function is selected in the [Navigation Pane](#), the [Main Window](#) will show the [Hazards](#) associated with whichever [Site](#) or [Location](#) is selected in the database [Tree View](#).

Description	HazardID
 Trip Hazard	00001
 Fall Hazard	00002

Main Window - Hazard View

Universal Risk Assessment functions

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

- [Hazards](#)
- [Perform Universal Risk Assessment](#)

Related activities

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

- [Clients](#)
- [Sites](#)
- [Locations](#)

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

Hazards

Hazards

PATGuard 3 allows you to add Hazards to a particular [Site](#) or [Location](#), and also to add [Universal Risk Assessments](#) to those Hazards.

Manually adding Hazards

To add a Hazard, first select the [Site](#) or [Location](#) that the Hazard is to be created at in the [Tree View](#) in the [Navigation Pane](#). See also [Changing Hazard Details](#) and [Deleting Hazards](#).



Select a Site or Location

To add the Hazard click on the **Add Hazard** option in the [File Menu](#), as shown below, to bring up the [Hazard Details](#) window.



Add Hazard option

Hazard Details

The Hazard Details window allows you to view, add or amend details of the Hazard, including Hazard ID and Description, and to perform a [Universal Risk Assessment](#) for the Hazard. The [Site](#) and [Location](#) will already be populated.

Hazard Details

Hazard ID:

Description:

Site Name:

Location Name:

Risk Assessments

Date	Test No.	Actions Complete	Actions Due	Person
04/07/2013		No		Admin

Hazard Details window, including a Universal Risk Assessment

The << and >> buttons can be used to view the previous/next Hazard at that [Site](#) or [Location](#).

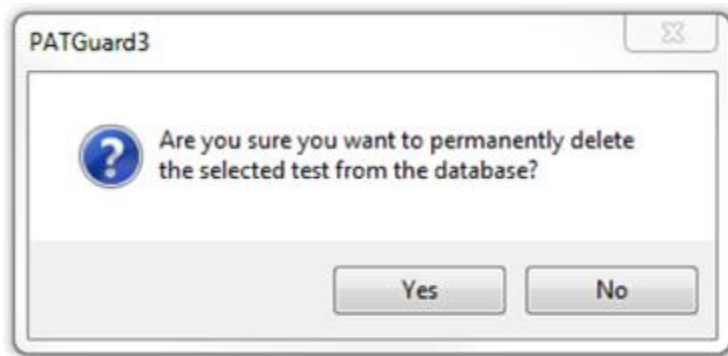
Adding a Universal Risk Assessment

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

See the [Perform Universal Risk Assessment](#) page for more information on adding a Universal Risk Assessment to a Hazard.

Deleting a Universal Risk Assessment

To delete a Universal Risk Assessment associated with a Hazard, select the row containing the Universal Risk Assessment and hit the **Delete** button. You will be prompted for confirmation.



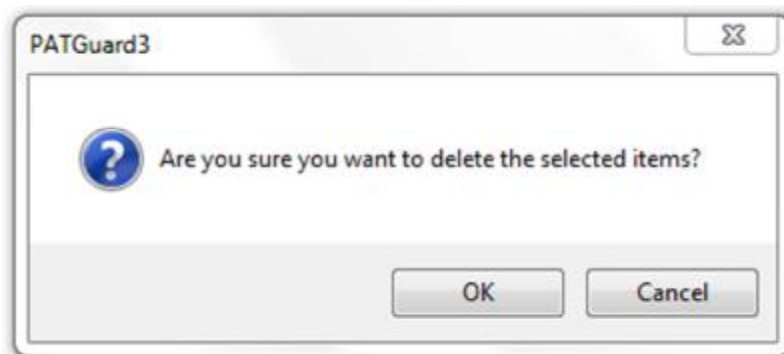
Delete Universal Risk Assessment

Changing Hazard Details

Hazard details can be changed by double-clicking the Hazard in the [Main Window](#). This will bring up the [Hazard Details](#) window.

Deleting Hazards

Hazards can be deleted by selecting them in the [Main Window](#), and pressing **Delete**. You will be prompted for confirmation.



Delete Hazard Confirmation

Deleted Hazards can be restored from the [Recycle Bin](#).

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

Perform Universal Risk Assessment

Perform Universal Risk Assessment

Universal Risk Assessments can be performed directed from the [Hazard Details](#) window. They can also be performed by clicking on a [Hazard](#) in the [Main Window](#) and selecting **Universal Risk Assessment** from the [Function Menu](#), as shown below, to bring up the [Universal Risk Assessment](#) window.



Universal Risk Assessment option

Universal Risk Assessment window

The Universal Risk Assessment window allows you to view or complete a risk assessment of the [Hazard](#). The Hazard ID, [Site](#), [Location](#), and [Username](#) will already be populated.

Universal Risk Assessment window

Add Action

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

Impact of Risk event: Moderate

Probability of Occurrence: Possible

Priority of Risk Level: 6

Advice: Moderate Risk - Significant Action should be planned in accordance with the overall risk management program. Monitor with caution.

1	Actions Required to Reduce Risk
	Rectify uneven surface

By Who: Owner

By When: 10/07/2013

Completed:

Default photo

Extent of uneven surface

Attachment 1/1

Add Attachment Delete Attachment

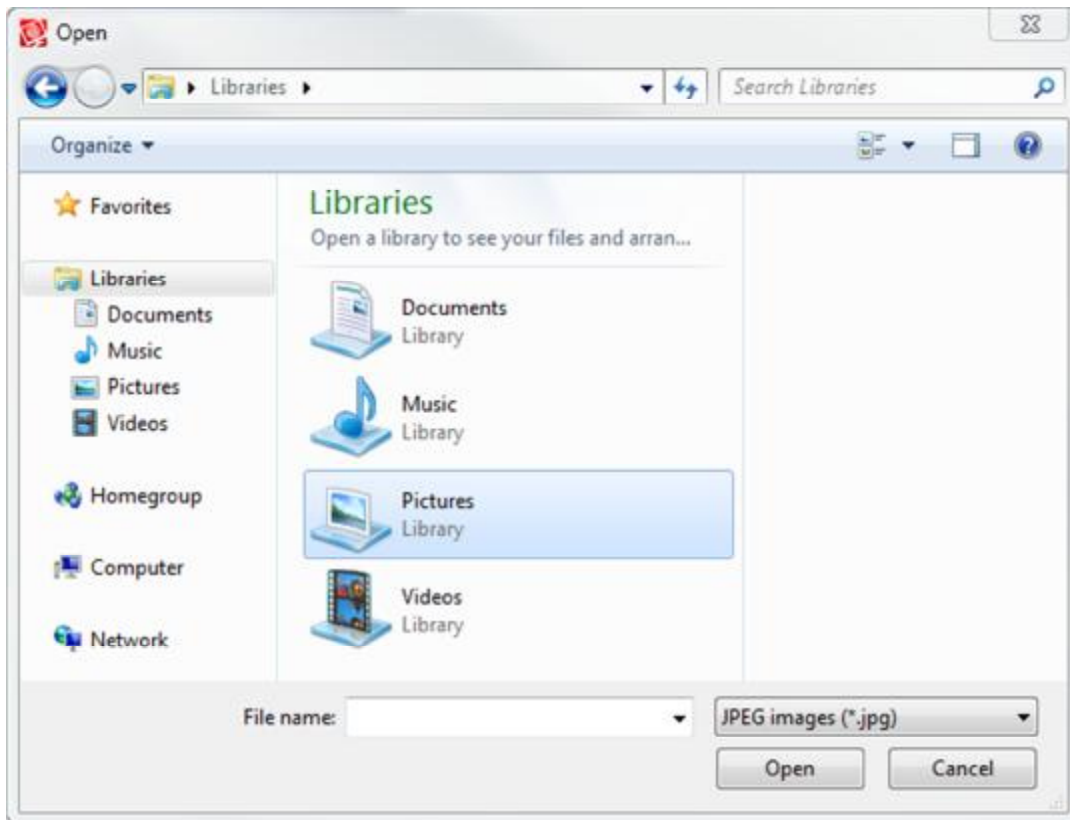
Ok Cancel

Universal Risk Assessment - Add Action

Multiple actions can be added to a single Universal Risk Assessment.

Attaching photos to Universal Risk Assessment

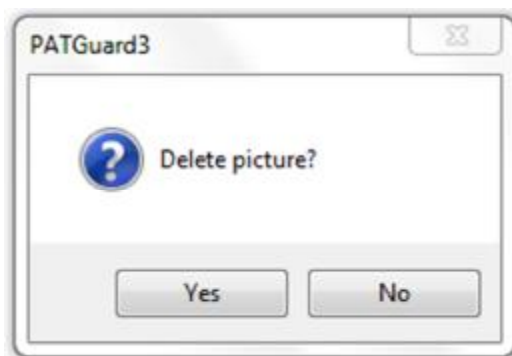
You can also attach photos of the Hazard to the Universal Risk Assessment. To do this, click the **Add Attachment** button in the Universal Risk Assessment window. This will open the Open Photo window.



Open Photo window

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

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

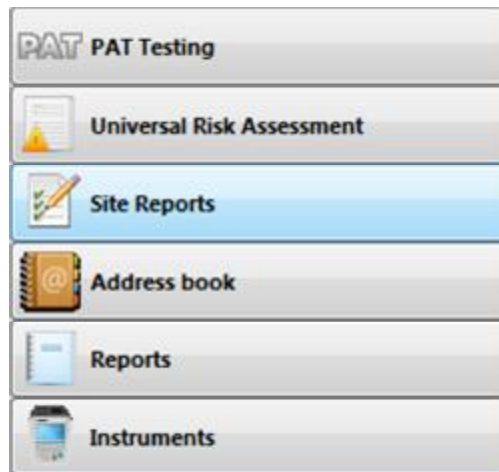


Delete Picture Confirmation

Site Reports



Site Reports

The Site Reports function of PATGuard 3, which is accessible from the [Navigation Pane](#), allows you to view, add and amend details of Site Reports relating to particular [Sites](#) and [Locations](#).



Navigation Pane - Site Reports

When the Site Reports function is selected in the [Navigation Pane](#), the [Main Window](#) will show the Site Reports associated with whichever [Site](#) or [Location](#) is selected in the database [Tree View](#).

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

Main Window - Site Report View

Site Reports functions

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

- [Emergency Lighting](#)
- [Fire Alarm](#)

Related activities

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

- [Clients](#)
- [Sites](#)
- [Locations](#)

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

Emergency Lighting

Emergency Lighting

PATGuard 3 allows you to create an Emergency Lighting Site Report for a given [Site](#) or [Location](#). See also [Changing Emergency Lighting Site Reports](#) and [Deleting Emergency Lighting Site Reports](#).

To add an Emergency Lighting Site Report, first select the [Site](#) or [Location](#) that you wish to create an Emergency Lighting Site Report for in the [Tree View](#) in the [Navigation Pane](#).



Select a Site or Location

Next click on the **Emergency Lighting** option in the [Functions Menu](#), as shown below, to bring up the [Emergency Lighting Site Report](#) window.



Site Reports - Emergency Lighting

Emergency Lighting Site Report

The Emergency Lighting Site Report window allows you to view or complete an Emergency Lighting assessment for a given [Site](#) or [Location](#). Some fields will already be populated with [Client](#) or [Site](#) details.

Site Reports Details

Report ID: 00001

Site Name: Site 2

Location Name: < None >

A. DETAILS OF THE CLIENT

Client: Client 1

Address: The Acme Building, 1 Acme Way, London, SW1 1AA

B. DETAILS OF THE EMERGENCY LIGHTING INSTALLATION

Installation Address: The Acme Building, 1 Acme Way, London, SW1 1AA

Details of the system: [Empty field]

- Purpose of Certificate
- To certify continued
- compliance of an existing
- installation

C. DETAILS OF THE ELECTRICAL CONTRACTOR

Trading Title: [Empty field]

Address: [Empty field]

Registration

- Number: [Empty field]
- Telephone Number: [Empty field]

I/we hereby certify that the emergency lighting system installation at the above premises has been inspected and tested by me/us in accordance with the 'Results Schedule of Items inspected and tested' on page 2, and to the best of my/our knowledge and belief, the installation complies at the time of my/our inspection and testing with the recommendations given in BS 5266-1: 2005 Emergency Lighting Part 1: Code of practice for the emergency lighting of premises, BS EN 1838: 1999 / BS 5266-7: 1999 Lighting applications - Emergency Lighting and BS EN 50172: 2004 / BS 5266-8: 2004 Emergency escape lighting systems, except as stated in the

OK Cancel

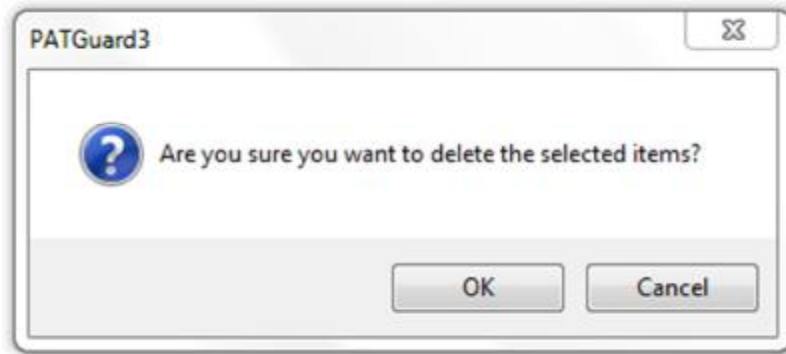
Emergency Lighting Site Report window

Editing an Emergency Lighting Site Report

To edit an Emergency Lighting Site Report, double-click the Emergency Lighting Site Report in the [Main Window](#) to bring up the [Emergency Lighting Site Report](#) window.

Deleting an Emergency Lighting Site Report

To delete an Emergency Lighting Site Report, select the Emergency Lighting Site Report in the [Main Window](#) and hit the **Delete** button. You will be prompted for confirmation.



Delete Emergency Lighting Site Report

Fire Alarm

Fire Alarm

PATGuard 3 allows you to create a Fire Alarm Site Report for a given [Site](#) or [Location](#). See also [Changing Fire Alarm Site Reports](#) and [Deleting Fire Alarm Site Reports](#).

To add a Fire Alarm Site Report, first select the [Site](#) or [Location](#) that you wish to create a Fire Alarm Site Report for in the [Tree View](#) in the [Navigation Pane](#).



Select a Site or Location

Next click on the **Fire Alarm** option in the [Functions Menu](#), as shown below, to bring up the [Fire Alarm Site Report](#) window.



Site Reports - Fire Alarm

Fire Alarm Site Report

The Fire Alarm Site Report window allows you to view or complete a Fire Alarm assessment for a given [Site](#) or [Location](#). Some fields will already be populated with [Client](#) or [Site](#) details.

The screenshot shows the 'Site Reports Details' window. At the top, there are input fields for 'Report ID' (00002), 'Site Name' (Site 2), and 'Location Name' (< None >). Below these are four sections, each with a blue header:

- A. DETAILS OF THE CLIENT**: Client: Client 1; Address: The Acme Building, 1 Acme Way, London, SW1 1AA.
- B. DETAILS OF THE FIRE DETECTION AND ALARM SYSTEM**: Installation Address: The Acme Building, 1 Acme Way, London, SW1 1AA; Details of the system: (empty text area).
- C. EXTENT OF THE INSTALLATION AND LIMITATIONS OF THE INSPECTION AND SERVICING**: Extent of the fire detection and alarm system covered by this report: (empty text area); Agreed Limitations, if any, of the inspection and servicing: (empty text area).
- D. CERTIFICATION OF INSPECTION AND SERVICING**: I/we being the competent person(s) responsible (as indicated by my/our signatures below) for the inspection and servicing of the fire alarm system, particulars of which are set out above, CERTIFY that the said work or which I/we have been responsible complies to the best of my/our knowledge and belief with the recommendation of Clause 45 of BS 5839-1:2002 quarterly inspection of vented batteries / periodic inspection and test / inspect and test over a 12 months period (delete as applicable), except for the variations, if any, stated in the report.

At the bottom right, there are 'OK' and 'Cancel' buttons.

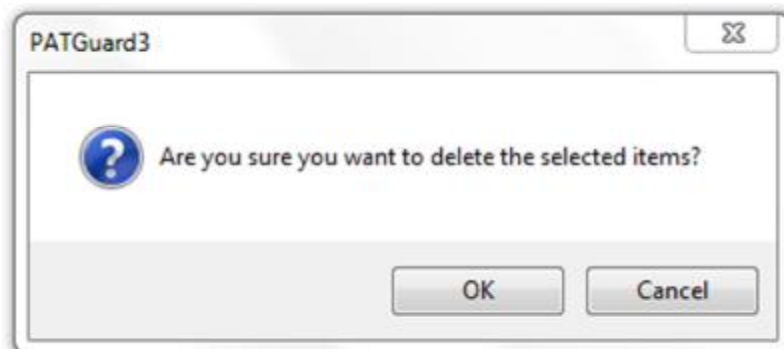
Fire Alarm Site Report window

Editing a Fire Alarm Site Report

To edit a Fire Alarm Site Report, double-click the Fire Alarm Site Report in the [Main Window](#) to bring up the [Fire Alarm Site Report](#) window.

Deleting a Fire Alarm Site Report

To delete a Fire Alarm Site Report, select the Fire Alarm Site Report in the [Main Window](#) and hit the **Delete** button. You will be prompted for confirmation.

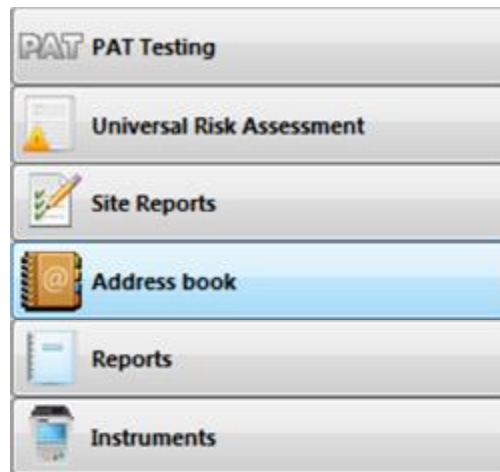


Delete Fire Alarm Site Report

Address Book

Address Book

The Address Book function, which is accessible from the [Navigation Pane](#), allows you to view, add and amend details of Personnel. These Personnel can either be [Internal Personnel](#) or [External Personnel](#).



Navigation Pane - Address Book

When the Address Book is selected in the [Navigation Pane](#), the [Main Window](#) will show the [External Personnel](#) associated with whichever [Client](#), [Site](#) or [Location](#) is selected in the database [Tree View](#). If the top level of the Database is selected in the [Tree View](#), the [Main Window](#) will show the [Internal Personnel](#).



Main Window - Address Book View

Internal Personnel

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

See [Adding Internal Personnel](#) for more information.

External Personnel

External personnel are staff associated with a particular [Client](#), [Site](#) or [Location](#). They act as a contact for that Client, Site or Location and can receive relevant Reports by email.

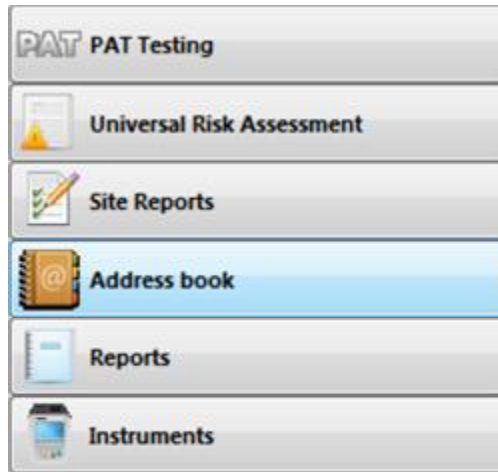
See [Adding External Personnel](#) for more information.

Adding Internal Personnel

Adding Internal Personnel

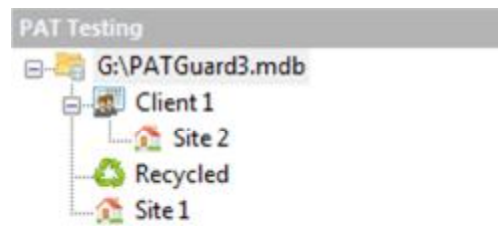
Internal personnel are staff that you employ or that otherwise work on your behalf. They can be either Technical or Administration staff and can be assigned responsibility for individual Clients and Sites. See also [Changing Internal Personnel Details](#) and [Deleting Internal Personnel](#).

To add new Internal Personnel, select the [Address Book](#) from the [Navigation Pane](#).



Navigation Pane - Address Book

Select the top level of the database in the [Tree View](#).



Top level of database Tree View selected

The [Main Window](#) will show the names of any Internal Personnel that have already been added. Click on **Add Personnel...** in the Main Window to add new Internal Personnel.



Main Window - Address Book View

Internal Personnel Details

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

Personnel

Forename: Jane Surname: Smith
 Company: PAT Ltd Department: Administration
 Address: PAT Ltd HQ Telephone: 0122345678
 An Industrial Estate Fax: 0122345679
 North of Watford Gap Email: jane@pat.co.uk
 Postcode: NE1 2BE

Available Clients/Sites: Responsibilities:
 Client 1
 Site 1
 Site 2

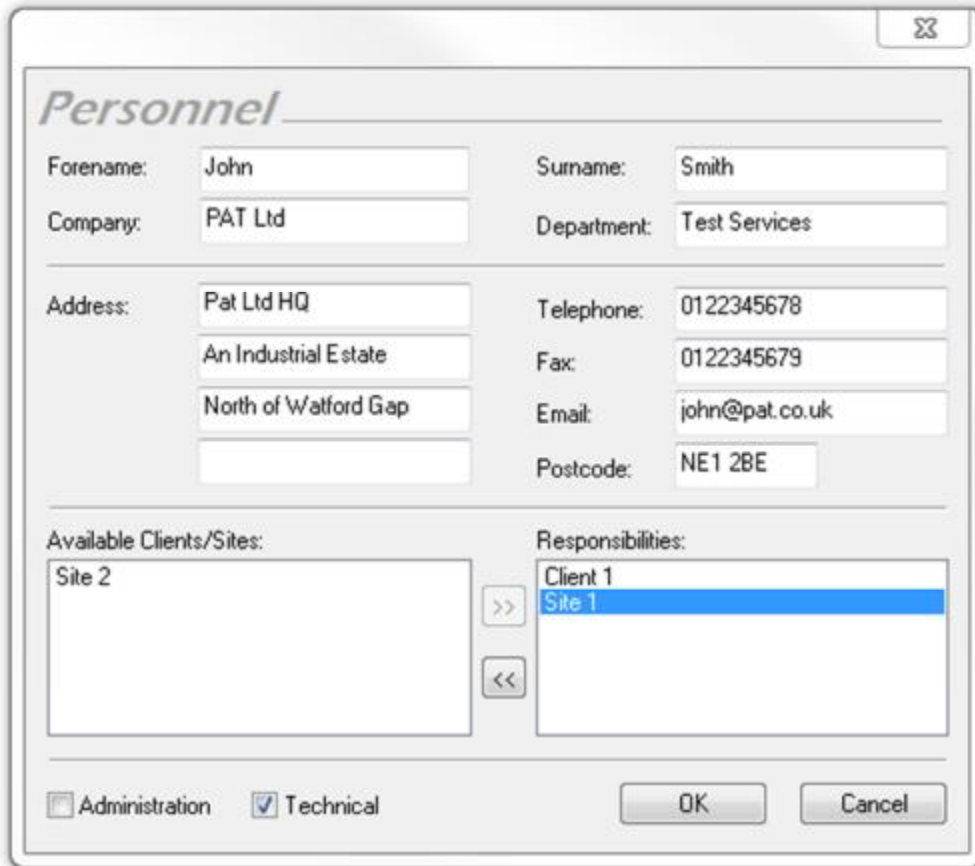
Administration Technical OK Cancel

Internal Personnel Details

Responsibility for Clients and Sites

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

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



Personnel

Forename: John Surname: Smith
 Company: PAT Ltd Department: Test Services

Address: Pat Ltd HQ Telephone: 0122345678
 An Industrial Estate Fax: 0122345679
 North of Watford Gap Email: john@pat.co.uk
 Postcode: NE1 2BE

Available Clients/Sites: Site 2 Responsibilities: Client 1
 Site 1

Administration Technical

OK Cancel

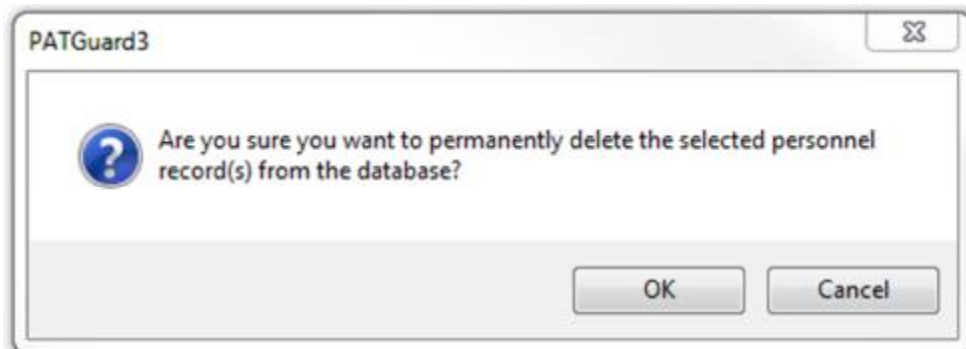
Personnel Details Window - Site/Client Responsibility

Changing Internal Personnel Details

Internal Personnel details can be changed by double-clicking the name of the Internal Personnel in the [Main Window](#). This will bring up the [Internal Personnel Details](#) window.

Deleting Internal Personnel

Internal Personnel can be deleted by selecting the name of the Internal Personnel in the [Main Window](#) and pressing **Delete**. You will be prompted for confirmation.



PATGuard3

Are you sure you want to permanently delete the selected personnel record(s) from the database?

OK Cancel

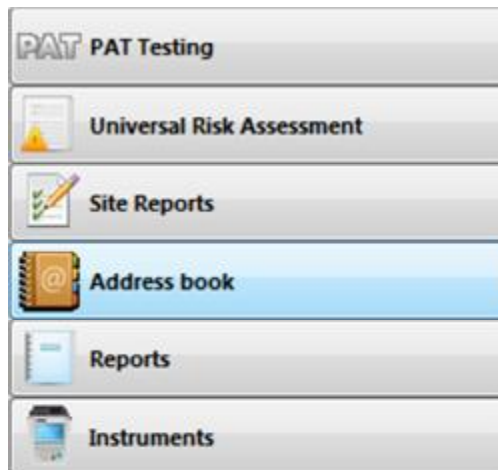
Delete Personnel Confirmation

Adding External Personnel

Adding External Personnel

External personnel are staff associated with a particular [Client](#), [Site](#) or [Location](#). They act as a contact for that Client, Site or Location and can receive relevant Reports by email. See also [Changing External Personnel Details](#) and [Deleting External Personnel](#).

To add new External Personnel, select the [Address Book](#) from the [Navigation Pane](#).



Navigation Pane - Address Book

Select the [Client](#), [Site](#) or [Location](#) that you wish to associate the External Personnel with in the database [Tree View](#).



Client 1 selected in Tree View

The [Main Window](#) will show the names of any External Personnel that have already been added for that [Client](#), [Site](#) or [Location](#). Click on **Add Personnel...** in the [Main Window](#) to add new External Personnel.



Main Window - Address Book View

External Personnel Details

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

External Personnel Details

Changing External Personnel Details

External Personnel details can be changed by double-clicking the name of the External Personnel in the [Main Window](#). This will bring up the [External Personnel Details](#) window.

Deleting External Personnel

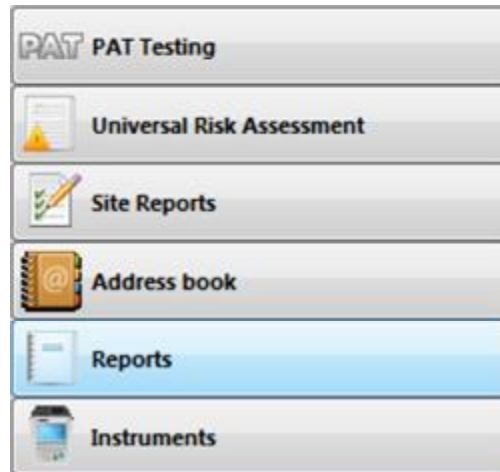
External Personnel can be deleted by selecting the name of the External Personnel in the [Main Window](#) and pressing **Delete**. You will be prompted for confirmation.

Delete Personnel Confirmation

Reports

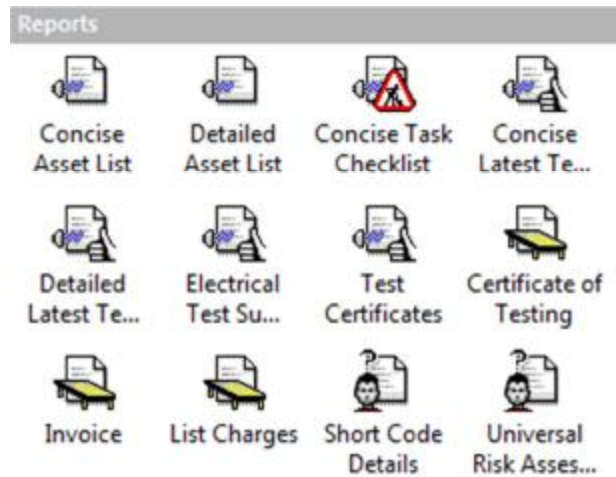
Reports

The Reports function of PATGuard 3, which is accessible from the [Navigation Pane](#), allows you to generate Reports from the information in the PATGuard 3 database, such as Test Reports and Certificates, and also [Invoices](#) and [Repair Management](#).



Navigation Pane - Reports

When the Reports function is selected in the [Navigation Pane](#), the [Tree View](#) will be replaced with the [list of the available reports](#).



Navigation Pane - Available Reports

Reports functions

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

- [List of Reports](#)
- [Generating a Report](#)
- [Printing or saving to file](#)
 - [Saving a Report to file](#)
 - [Print a Report](#)
 - [Emailing a Report](#)
- [Editing Reports](#)
 - [Copying a Report](#)
 - [Deleting a Report](#)
 - [Restoring a Report](#)
- [Repair Management](#)
- [Invoicing](#)

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

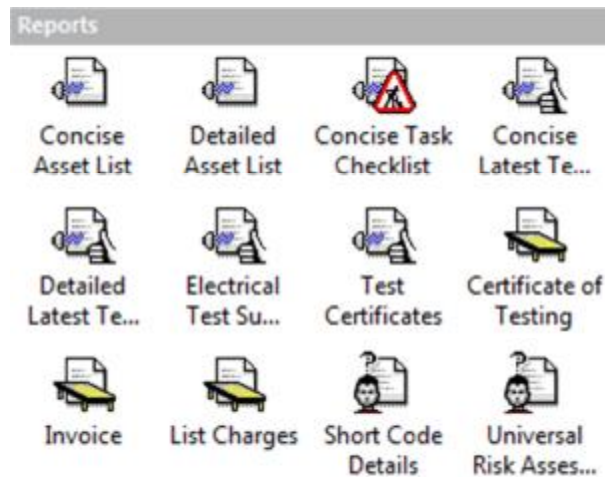
List of Reports

List of Reports

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

- Concise Asset List
- Detail Asset List
- Concise Task Checklist
- Concise Latest Test Results
- Detailed Latest Test Results
- Electrical Test Summary
- Test Certificates
- Certificate of Testing
- Invoice
- List charges
- Short Code Details
- Universal Risk Assessment

These Reports are available from the [Navigation Pane](#) when the [Reports](#) function is selected.



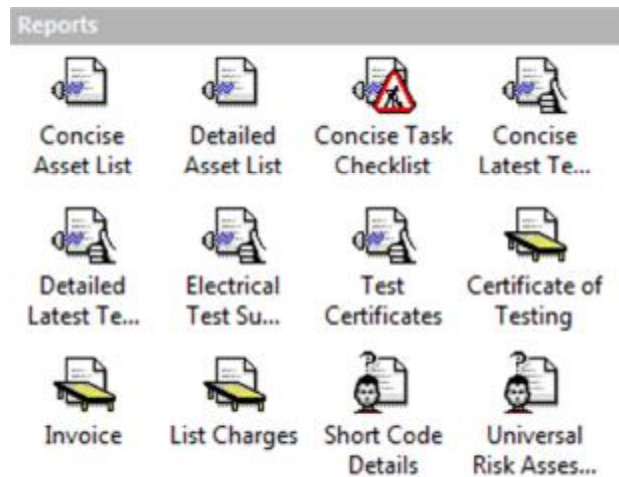
Navigation Pane - Available Reports

Reports can be [copied](#), [edited](#), [deleted](#) and [restored](#) as required. See also [Generating a Report](#) and [Printing or saving](#) to file.

Generating a Report

Generating a Report

The list of available [Reports](#) is available from the [Navigation Pane](#) when the [Reports](#) function is selected.



Navigation Pane - Available Reports

Reports are generated by double-clicking the Report you wish to generate, or by right-clicking on the report and selecting **Print...** or **Print preview...** The basic process of Generating a Report is the same for each report, although the options you will be asked to select will vary depending on the report type.

Reports Example - Certificate of Testing

In this example we will generate a Certificate of Testing. Double-click **Test Certificates** in the [Reports View](#) in the [Navigation Pane](#). This will open the Certificate of Testing window. Select the [Client](#), [Site](#) and [Location](#) you wish to generate Test Certificates for, or use the **<all>** option. You can also enter some text to add to the Test Certificate. Click **OK** to generate the Test Certificates.

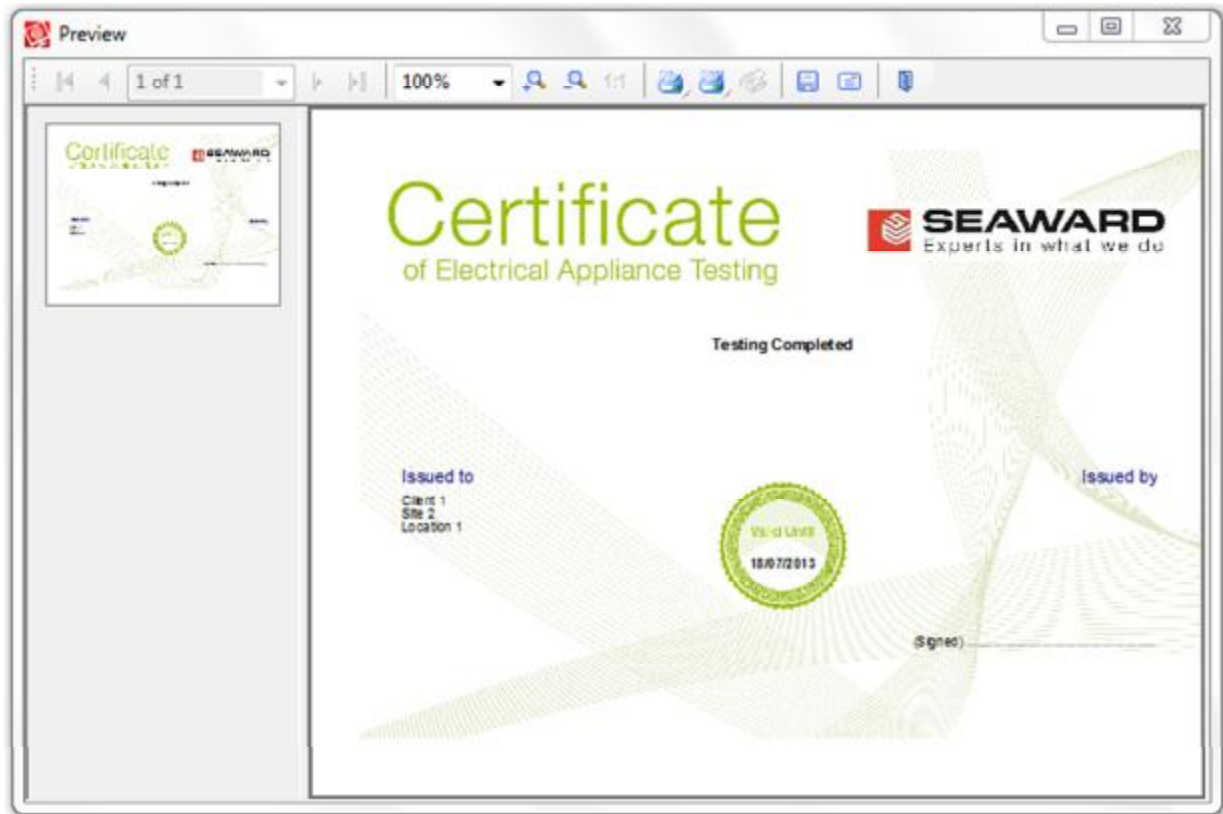
 A screenshot of a dialog box titled "Certificate of Testing". It contains four input fields:

- Client Name: Client 1
- Site Name: Site 2
- Location Name: Location 1
- Certificate Text: Testing Completed

 At the bottom right, there are two buttons: "OK" and "Cancel".

Reports - Certificate of Testing

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



Reports - Certificate of Testing preview

From the Preview window you can [Print](#), [Save](#) or [Email](#) your report. See also [copying](#), [editing](#), [deleting](#) and [restoring](#) Reports.

Printing or saving to file

Printing or saving to file

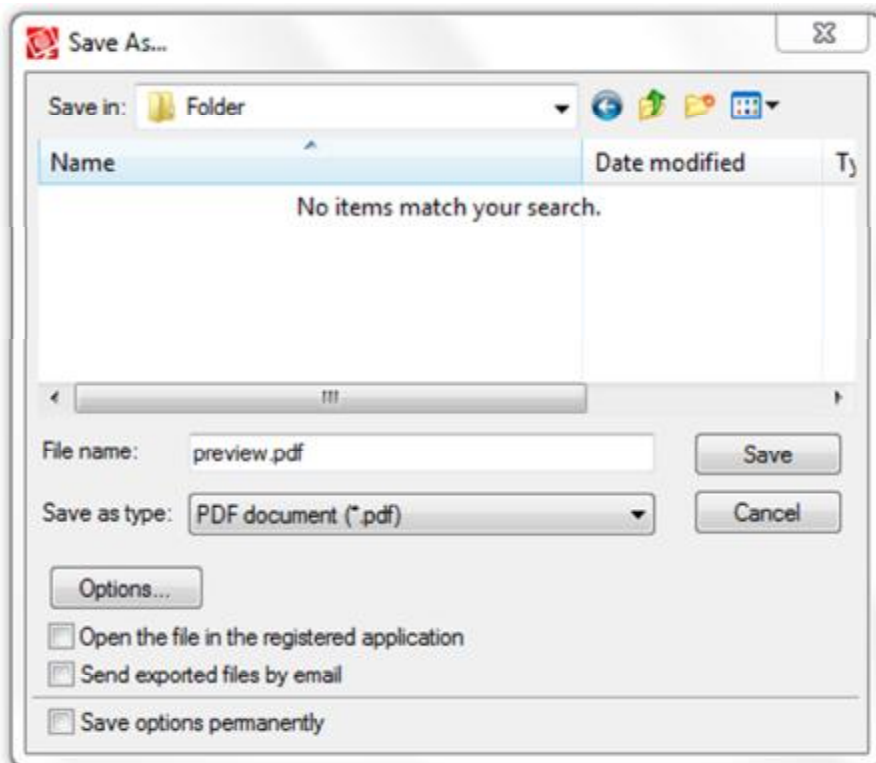
After [Generating a Report](#), the [Report](#) can be [Saved](#), [Printed](#) or [Emailed](#) as required from the Reports Preview window.



Reports - Certificate of Testing preview

Saving Reports to a file

To save a [Report](#) to a file, click the **Save** icon in the menu bar of the the Reports Preview window to open the Save As window.

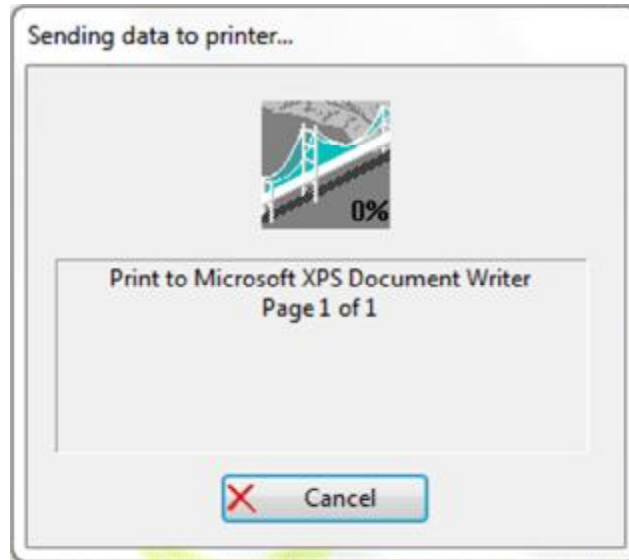


Saving a Report

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

Printing Reports

To print a [Report](#) to a file, click the **Print Current Page** or **Print all Pages** icon in the menu bar of the Reports Preview window.

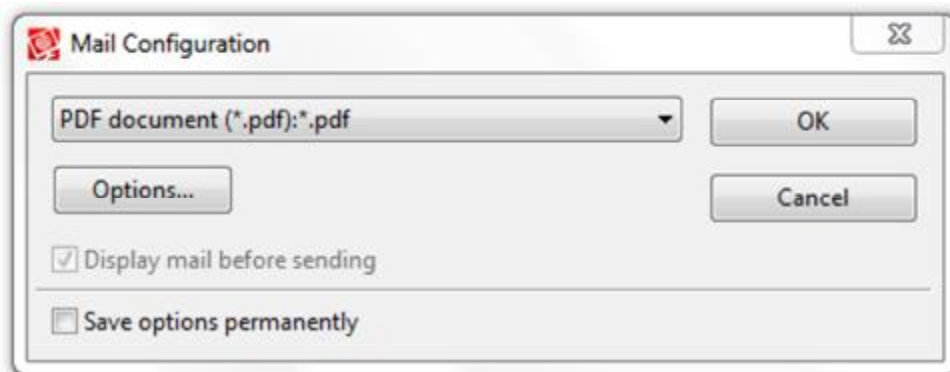


Printing a Report

There are a number of print options to choose from. The Reports Preview window has its own Help file to guide you through the options. To open the Reports Preview Help file, press **F1** while the Reports Preview is open.

Emailing Reports

To email a [Report](#), click the **Email** icon in the menu bar of the the Reports Preview window to open the Email window.



Emailing a Report

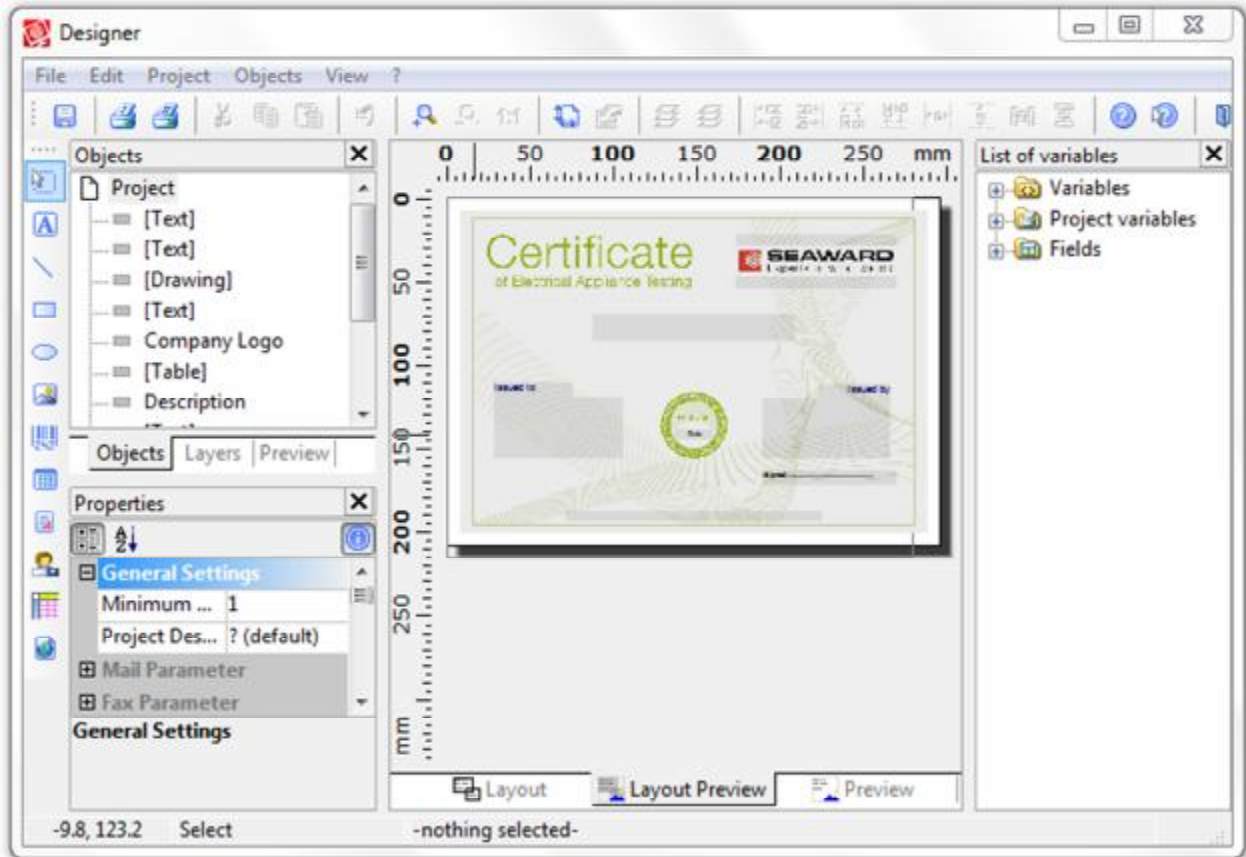
After selecting the desired options, click **OK** to open your default email program and attach the Report to an email.

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

Editing Reports

Editing Reports

PATGuard 3 allows you to edit a [Report](#) to better meet your requirements. To edit a Report, right click on the Report in the [Reports View](#) on the [Navigation Pane](#) and select **Edit...** This will open the Reports Designer window.

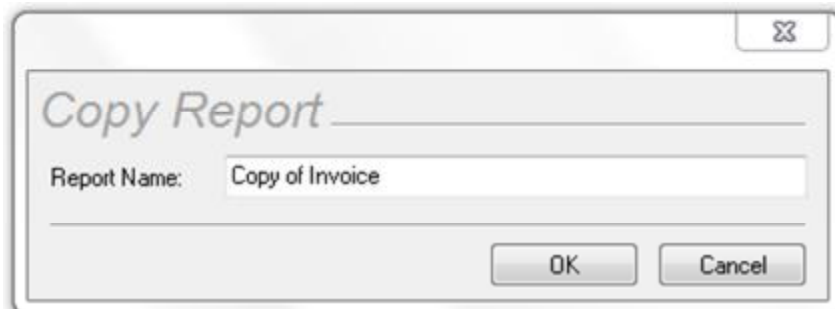


Reports Designer window

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

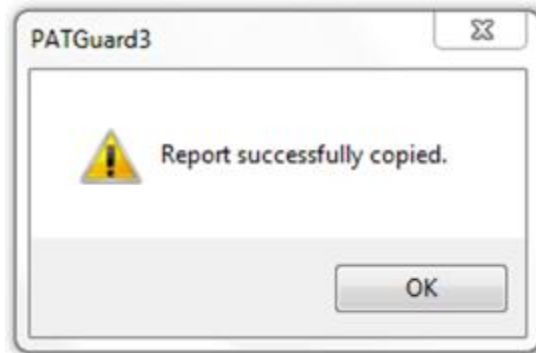
Copying a Report

You can create a copy of a Report by right click on the Report in the [Reports View](#) on the [Navigation Pane](#) and select **Copy...** This will open the Copy Report window. Enter a name for the Report and select **OK**.



Copy Report window

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

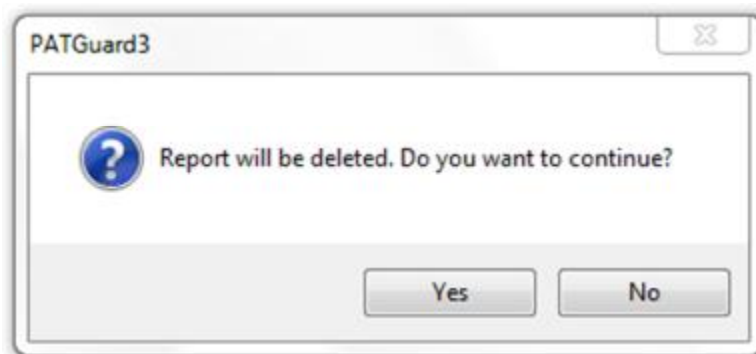


Copy Report confirmation

The new Report will now appear in the [Reports View](#) on the [Navigation Pane](#).

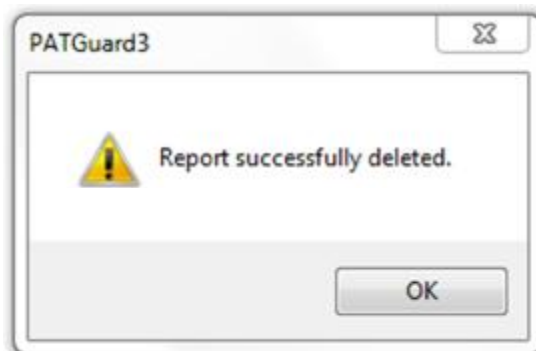
Deleting a Report

You can delete a Report by right click on the Report in the [Reports View](#) on the [Navigation Pane](#) and select **Delete...** You will be prompted for confirmation.



Delete Report window

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

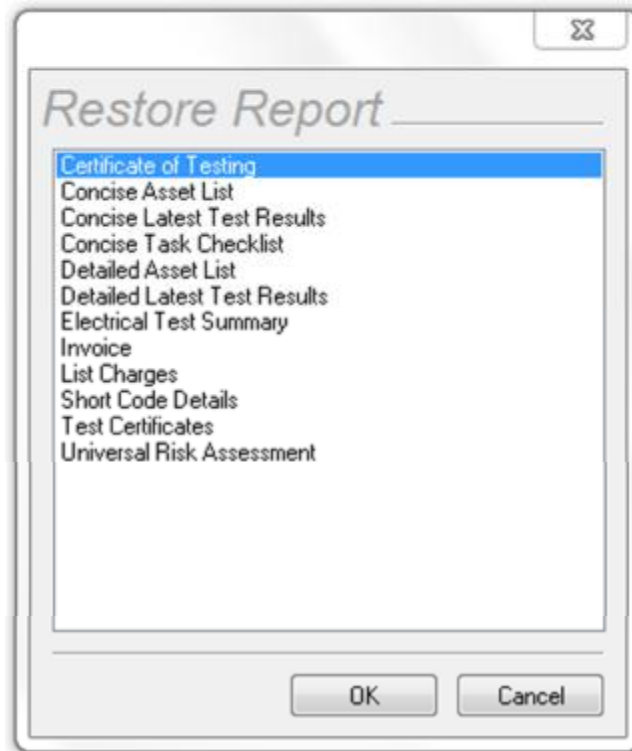


Copy Report confirmation

If you delete a default Report by mistake, it can be [Restored](#) if required.

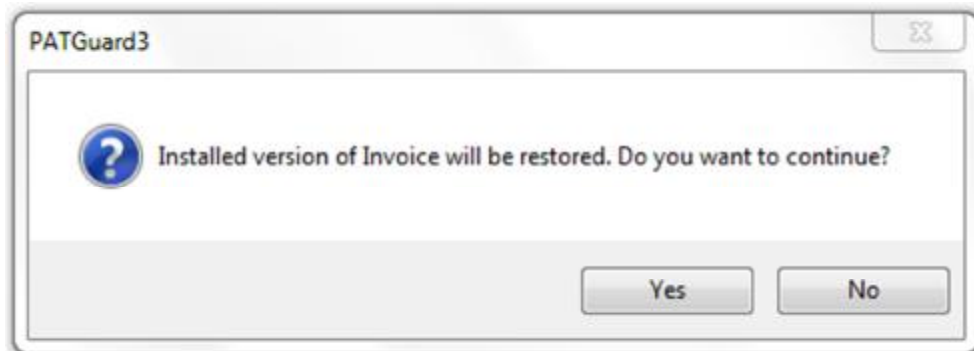
Restoring a Report

If you have edited or deleted a default Report and wish to restore it, right click on the Report in the [Reports View](#) on the [Navigation Pane](#) and select **Restore...** This will open the Restore Report window. Select the name of the Report you wish to Restore and select **OK**.



Restore Report

You will be prompted for confirmation.



Restore Report

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



Restore Report

The restored Report will now appear in the [Reports View](#) on the [Navigation Pane](#).

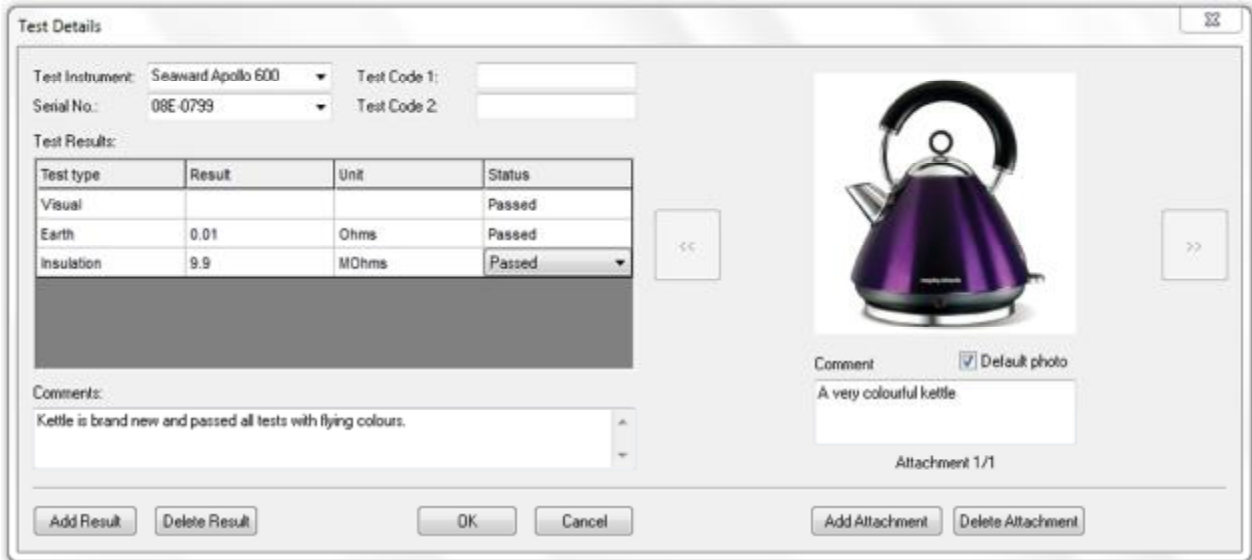
Repair Management

Repair Management

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

Setting up Repairs

Repair costs can be entered in the [Test Details window](#).



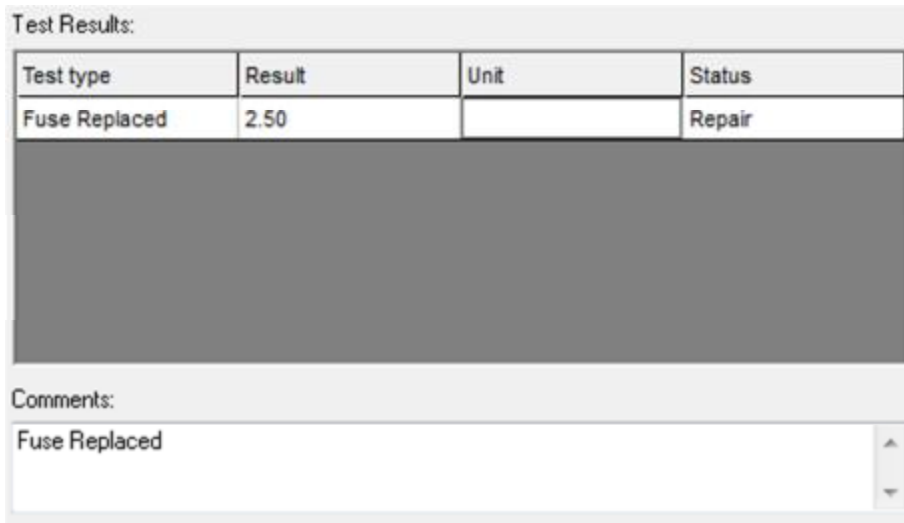
The screenshot shows the 'Test Details' window with the following information:

- Test Instrument: Seaward Apollo 600
- Serial No.: 08E-0799
- Test Results Table:

Test type	Result	Unit	Status
Visual			Passed
Earth	0.01	Ohms	Passed
Insulation	9.9	MOhms	Passed
- Comments: Kettle is brand new and passed all tests with flying colours.
- Attachment: A purple kettle image with the comment 'A very colourful kettle'.

Test Details window

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



The screenshot shows the 'Test Results' table with the following entry:

Test type	Result	Unit	Status
Fuse Replaced	2.50		Repair

Comments: Fuse Replaced

Add Repair

Printing Repair details

To print details of repairs, generate an [Invoice](#) in the normal way and ensure that **Repairs** is ticked.

Invoice

Client Name: Client 1

Site Name: Site 2

Location Name: Location 1

Charges type:

- Formal Visual All Price per test: 2
- Full Test All Price per test: 5
- PAT Risk Assessment Price per test: 3
- Repairs Currency: £ Purchase Tax: 20 %

Test Dates From: 11/01/2013 To: 18/07/2013

Invoice No.: 4 Order Ref.: 12345

Additional Item: Travel Cost: 25

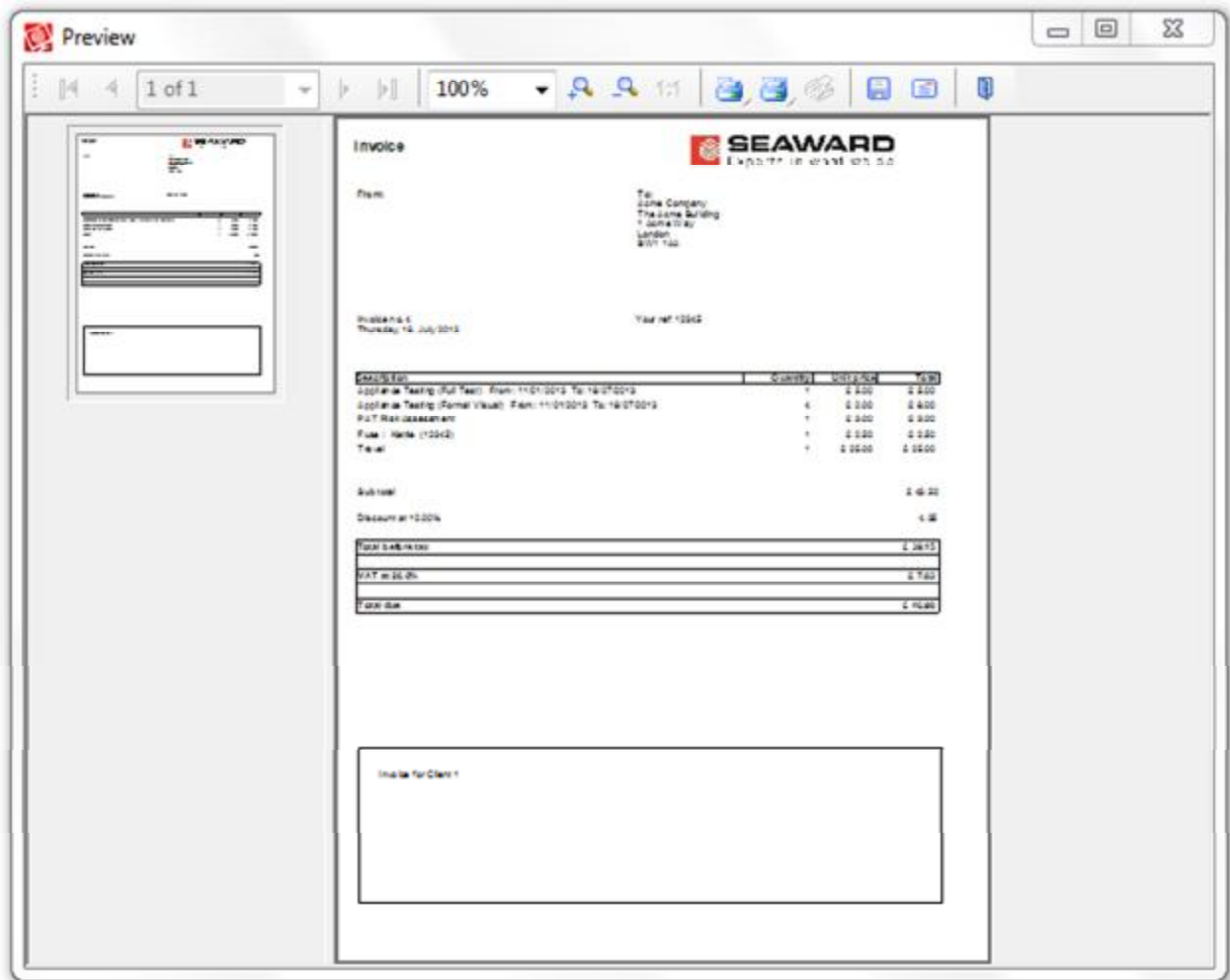
Fixed Price Contract: Overall Discount: 10 %

Notes: Invoice for Client 1

OK Cancel

Generate Invoice

The generated [Invoice](#) will display details of the repair and the cost involved so that the [Client](#) can be billed.

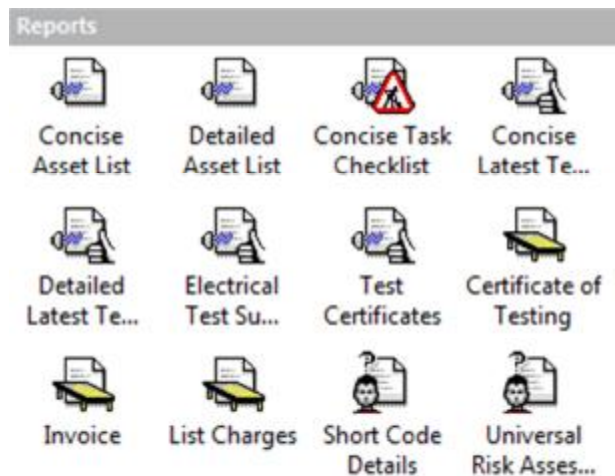


Generated Invoice

Invoicing

Invoicing

PATGuard 3 allows you to generate [Invoices](#) so that the [Client](#) can be billed for work undertaken. To generate an Invoice, double-click Invoice in the [Reports View](#) in the [Navigation Pane](#) to open the Invoice window.



Navigation Pane - Available Reports

Invoice Window

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

Invoice

Client Name: Client 1

Site Name: Site 2

Location Name: Location 1

Charges type:

Formal Visual All Price per test: 2

Full Test All Price per test: 5

PAT Risk Assessment Price per test: 3

Repairs Currency: £

Purchase Tax: 20 %

Test Dates From: 11/01/2013 To: 18/07/2013

Invoice No.: 4 Order Ref.: 12345

Additional Item: Travel Cost: 25

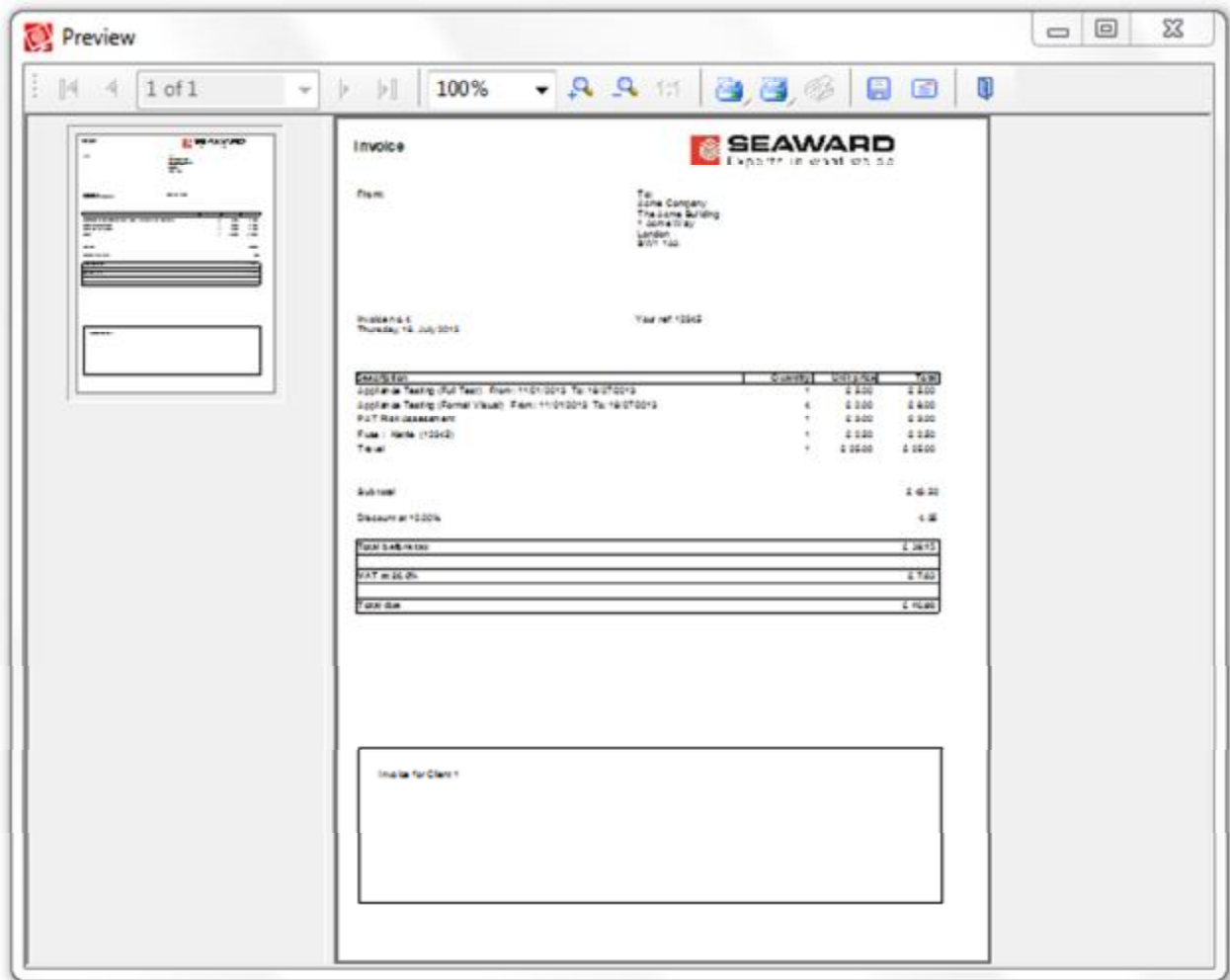
Fixed Price Contract: Overall Discount: 10 %

Notes: Invoice for Client 1

OK Cancel

Invoice window

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



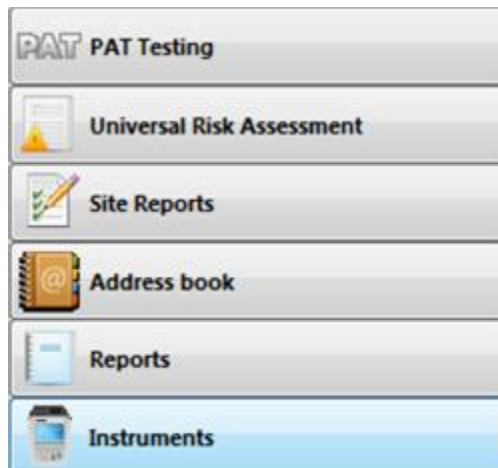
Invoice Preview

From the Preview window you can [Print](#), [Save](#) or [Email](#) your invoice.

Instruments

Instruments

The Instruments function of PATGuard 3, which is accessible from the [Navigation Pane](#), allows you to manage your Test Instruments. See [Tester Compatibility](#) for a list of test instruments that are compatible with PATGuard 3.



Navigation Pane - Instruments

When the Instruments function is selected in the [Navigation Pane](#), the [Tree View](#) will be replaced with a list of configured Instrument types.



Navigation Pane - Configured Instrument Types

Selecting **All Instruments** will display all of the configured Instruments in the [Main Window](#). Selecting a particular Instrument type will display all configured Instruments of that type in the [Main Window](#) (for example, all of the configured Apollo 600 Instruments).



Main Window - All Instruments

Instrument functions

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

- [Adding Test Instruments](#)
- [Entering Calibration Data](#)
- [Adding Test Sequences](#)

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

- [Downloading from your tester](#)
- [Uploading to your tester](#)

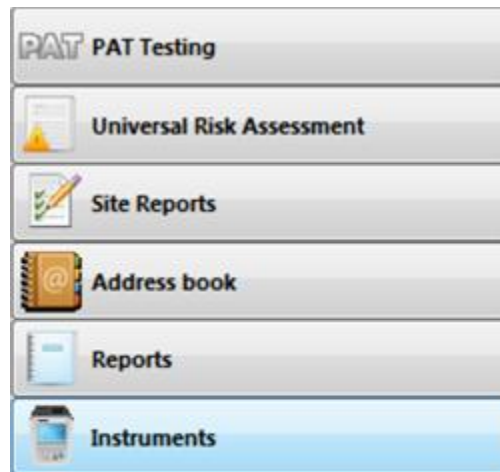
Click on the links above for more information about each function.

Adding Test Instruments

Adding Test Instruments

PATGuard 3 allows you to store details of your Test Instruments, including [Calibration Data](#), as Instruments in the database.

To add a new Test Instrument, select [Instruments](#) from the [Navigation Pane](#). See also [Changing Instrument Details](#) and [Deleting Instruments](#).



Navigation Pane - Instruments

The [Main Window](#) will now show the currently configured Test Instruments. Click on **Add Test Instrument...** in the Main Window to open the Test Instrument window to add a new Test Instrument.

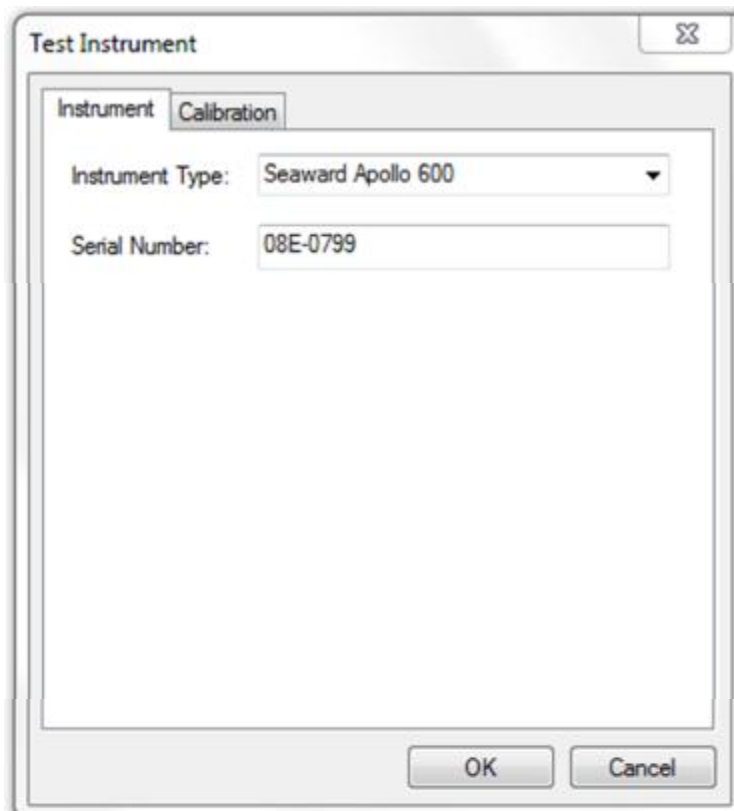


Main Window - All Instruments

Test Instrument window

The Test Instrument window allows you to view, add or amend the details of a Test Instrument, including Instrument Type, Serial Number, and [Calibration](#) and [Communications](#) settings.

The Instrument tab in the Test Instrument window allows you to select the **Instrument Type** and enter the **Serial Number**.



*Test Instrument - Instrument tab***Calibration**

The Calibration tab shows details of the Instrument calibration.

See [Entering Calibration Data](#) for more information on adding, editing or deleting Test Certificates for an Instrument.

Test Instrument

Instrument Calibration

Last Calibration: 05/07/2013

Next Calibration: 05/07/2014

Test Certificates:

Test Date	Certificate No	Test Centre
05/07/2013	123456	Seaward Electronic Ltd

Add... Edit.. Delete

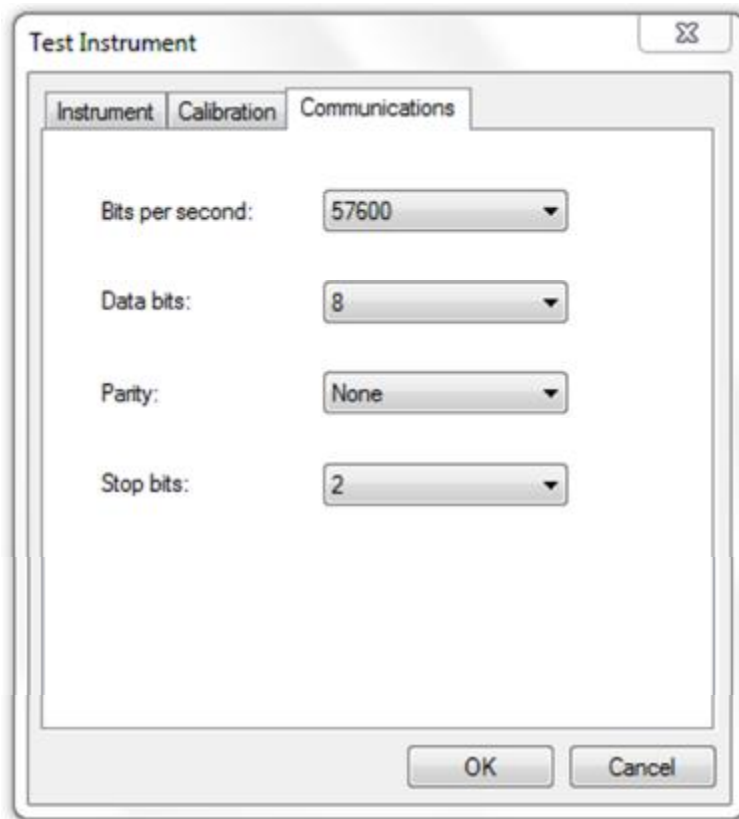
OK Cancel

Test Instrument - Calibration tab

Communications

For instruments that transfer data to and from the PC using serial communications, the Communications tab allows you to set the **Bits per second**, **Data bits**, **Parity** and **Stop bits** settings.

Please refer to your test instrument manual for more information on Communications settings.



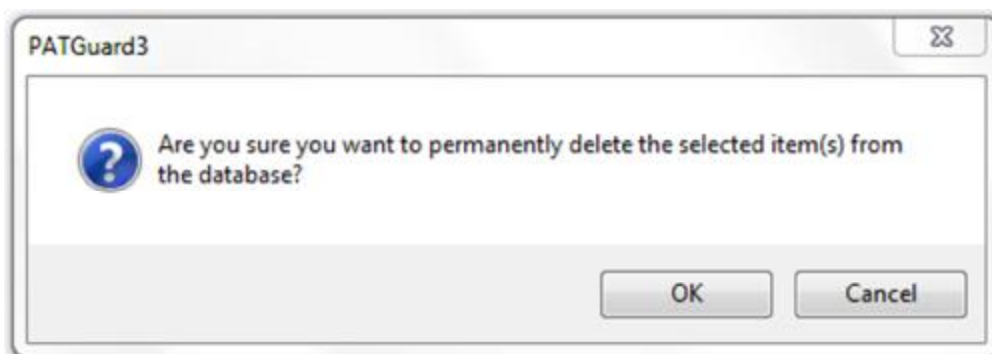
Test Instrument - Communication tab

Changing Instrument Details

Instrument details can be changed at any time by double-clicking the Instrument name in the [Main Window](#) or by right-clicking on the Instrument in the [Main Window](#) and selecting **Details...** This will bring up the [Test Instrument window](#).

Deleting Instruments

Instruments can be deleted by selecting them in the [Main Window](#), and pressing **Delete**. You can also delete an Instrument by right clicking the Instrument in the [Main Window](#) and selecting **Delete**. You will be prompted for confirmation.



Delete Instrument Confirmation

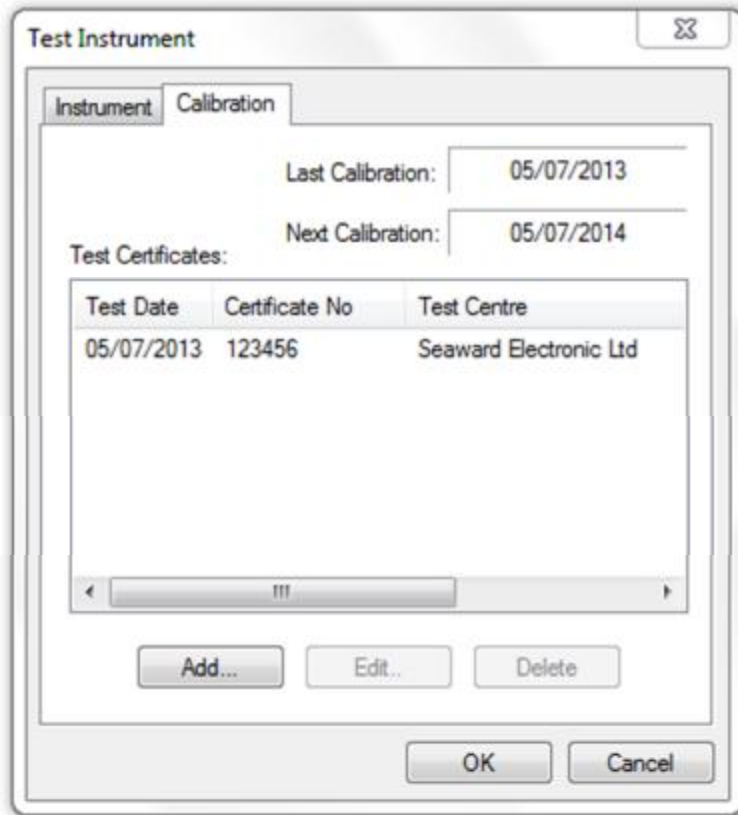
CAUTION: deleting an Instrument will also delete any calibration certificates associated with the Instrument.

Entering Calibration Data

Entering calibration data

PATGuard 3 allows you to store details of your [Test Instrument](#) Calibration Test Certificates in the database.

To add a Test Certificate, open the [Calibration tab](#) of the [Test Instrument window](#). See also [Changing Test Certificates](#) and [Deleting Test Certificates](#).

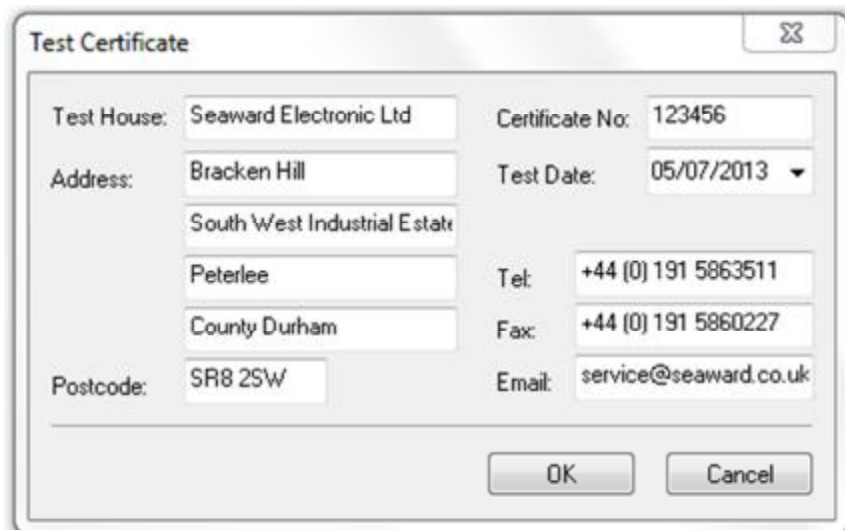


Test Instrument window - Calibration tab

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

Test Certificate window

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



Test Certificate window

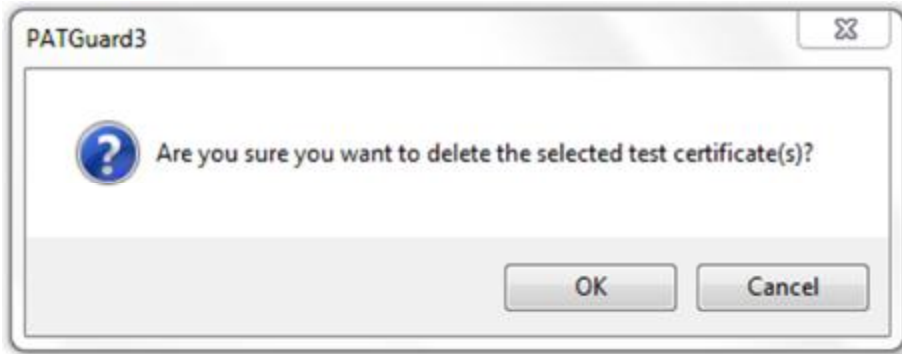
Click **OK** to add the Test Certificate.

Changing Test Certificates

Test Certificate details can be changed at any time by selecting them in the Calibration tab of the [Test Instrument window](#) and selecting **Edit...** This will bring up the [Test Certificate window](#).

Deleting Test Certificates

Test Certificates can be deleted by selecting them in the Calibration tab of the [Test Instrument window](#) and selecting **Delete**. You will be prompted for confirmation.



Delete Test Certificate Confirmation

Adding Test Sequences

Adding Test Sequences

PATGuard 3 allows you to create custom Test Sequences for compatible [Test Instruments](#), such as the Seaward SuperNova Elite.

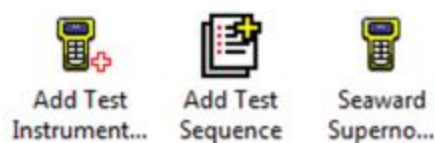
Please refer to your test instrument manual for more information on whether you can add custom Test Sequences.

To add a custom Test Sequence, select a compatible Instrument type from the list of configured Instruments in the [Navigation Pane](#). See also [Uploading Test Sequences](#), [Changing Test Sequences](#) and [Deleting Test Sequences](#).



Navigation Pane - Select compatible Instrument

When a compatible Instrument type is selected, the option **Add Test Sequence** will appear in the [Main Window](#).



Main Window - Add Test Sequence

Double-click **Add Test Sequence** in the [Main Window](#) to open the Test Sequence Details window.

Test Sequence Details window

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

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

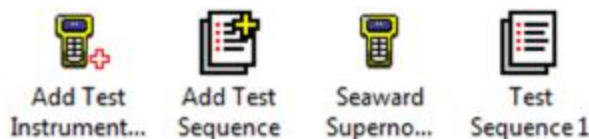
	Output	Limit	Test Duration	No. of Tests
Socket:	230V			
Earth Bond:	+/-200mA	0.01 ohm	2s	1
Insulation:	500V d.c.	1.0MOhm	2s	1
Substitute Leakage:		0.25mA	2s	1
Flash:	Skip		2s	1
Leakage:	Skip		2s	1
Touch Leakage:	Skip		2s	1
RCD Test:	Skip			1

Include Visual Inspection
 Include Polarity Test

OK Cancel

Test Sequence Details window

Click **OK** to add the Test Sequence. The Test Sequence will now appear in the [Main Window](#).



Main Window - New Test Sequence

Uploading Test Sequences

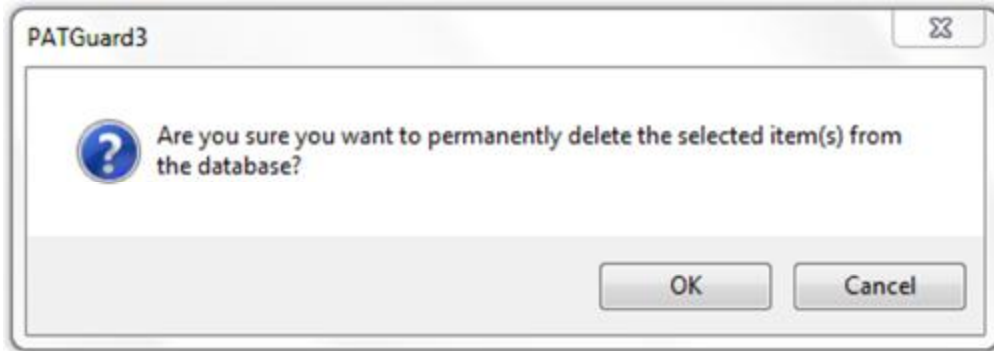
To upload a Test Sequence to your tester, ensure the compatible Instrument is connected to the PC. Right-click the Test Sequence name in the [Main Window](#) and select **Upload Test Sequence**.

Changing Test Sequences

Test Sequences can be changed at any time by double-clicking the Test Sequence name in the [Main Window](#) or by right-clicking on the Test Sequence in the [Main Window](#) and selecting **Details...** This will bring up the [Test Sequence Details window](#).

Deleting Test Sequences

Test Sequences can be deleted by selecting them in the [Main Window](#), and pressing **Delete**. You can also delete a Test Sequence by right clicking the Test Sequence in the [Main Window](#) and selecting **Delete**. You will be prompted for confirmation.



Delete Test Sequences Confirmation

Data Transfer

Data Transfer

The Data Transfer functions of PATGuard 3 are accessible from the [Data Transfer Menu](#) and are as follows:

- [Downloading from your tester](#)
 - [Finding the correct COM port](#)
 - [Preview](#)
 - [Duplicate Assets](#)
- [Uploading to your tester](#)
 - [Uploading configuration data](#)
- [Export to file](#)
- [Export to Email](#)
- [Backing up your database](#)



Data Transfer Menu

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

- [Create a new database](#)
- [Open an existing file](#)
- [Import a legacy database](#)

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

Downloading from your tester

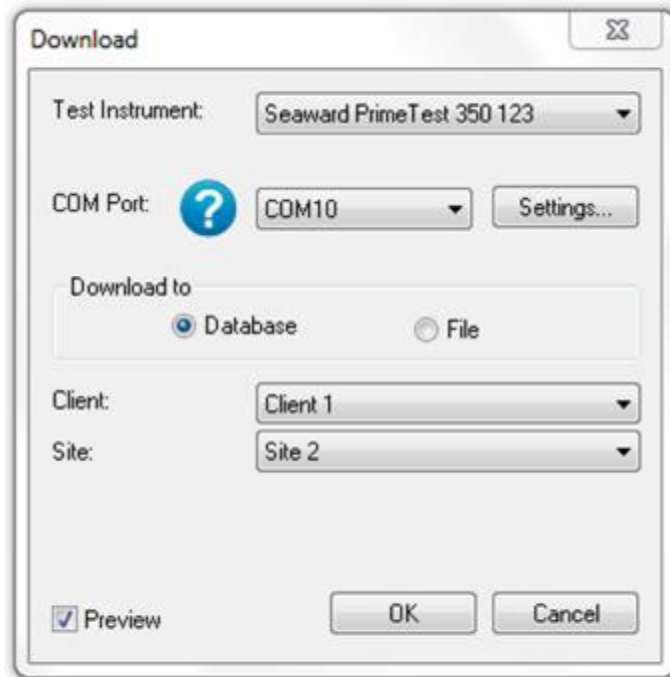
Downloading your tester

To Download from your tester, first [configure your Test Instrument](#). Then select **Download from tester** from the [Data Transfer](#) menu.



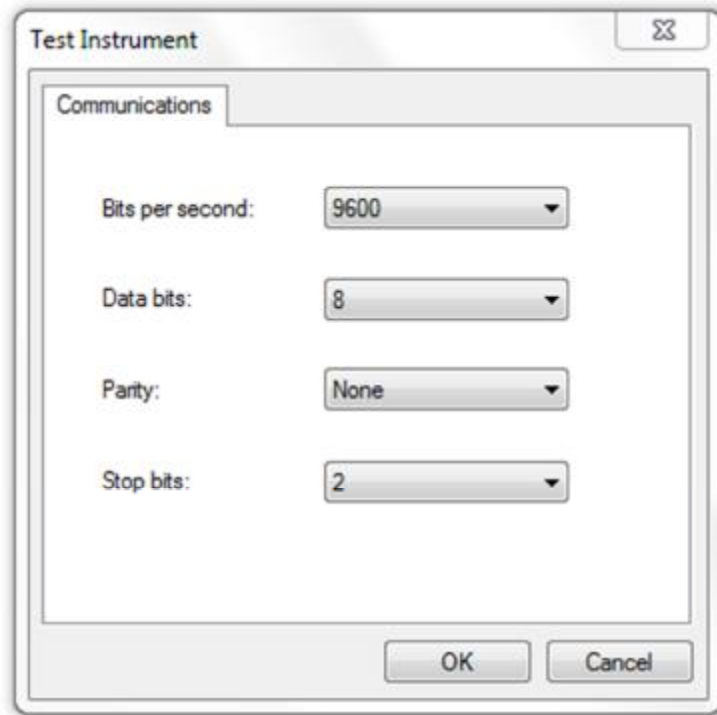
Data Transfer - Download

This will open the Download window.



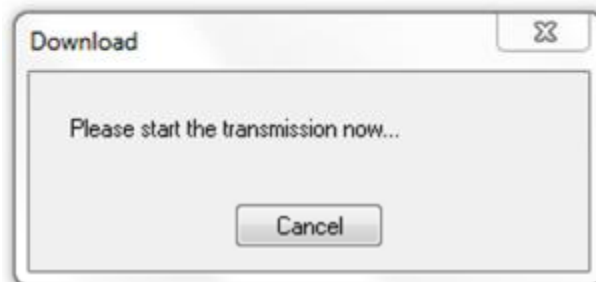
Download window

Select the [Instrument](#) you wish to download from, the [COM port](#) used and the data you wish to download and select **OK**. If you need to change the COM port settings, select **Settings...** You may also choose to [Preview](#) the download.



COM port settings window

Select **OK** to start the data download.



Data download in progress

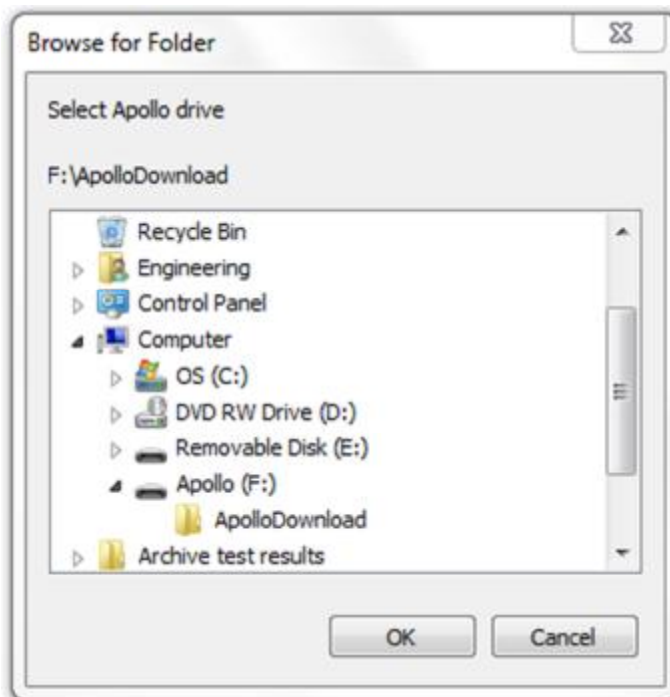
Apollo Download

If you are downloading from an Apollo Instrument there are additional options to choose from in the Download window, including the **Source Directory** (the location of your Apollo data) and which data to include in the Download.



Apollo Download window

Select **Browse...** to open the Browse for Folder window and select the Apollo directory.



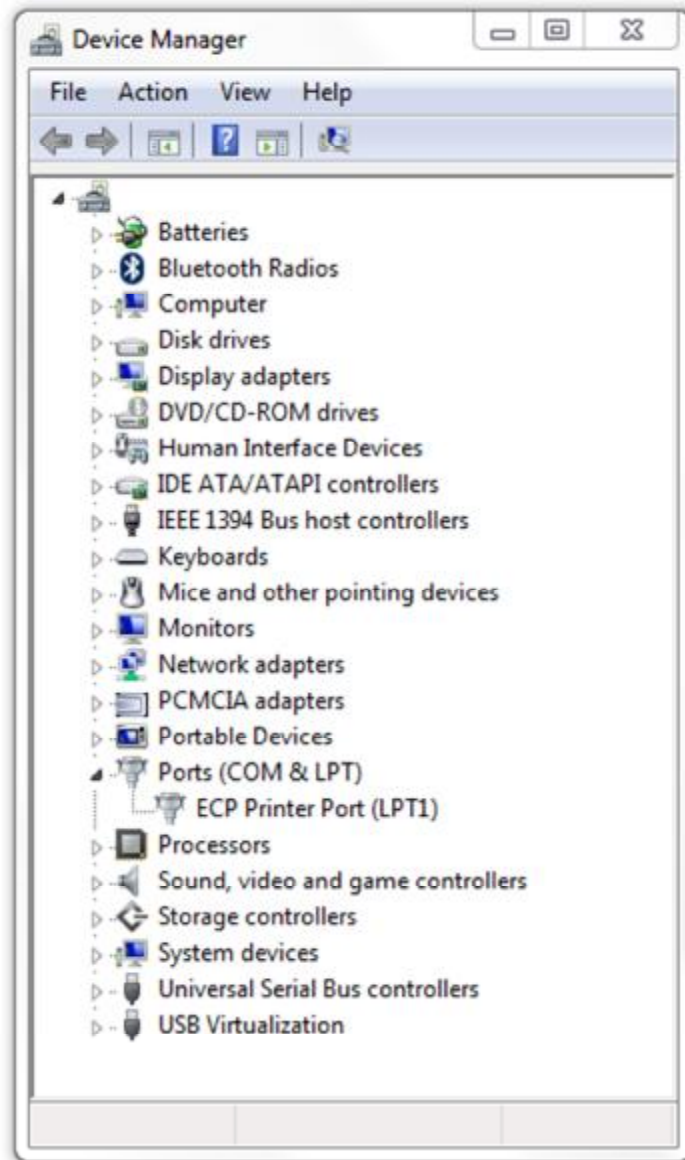
Browse for Folder window

Finding the correct COM port

Finding the correct COM port

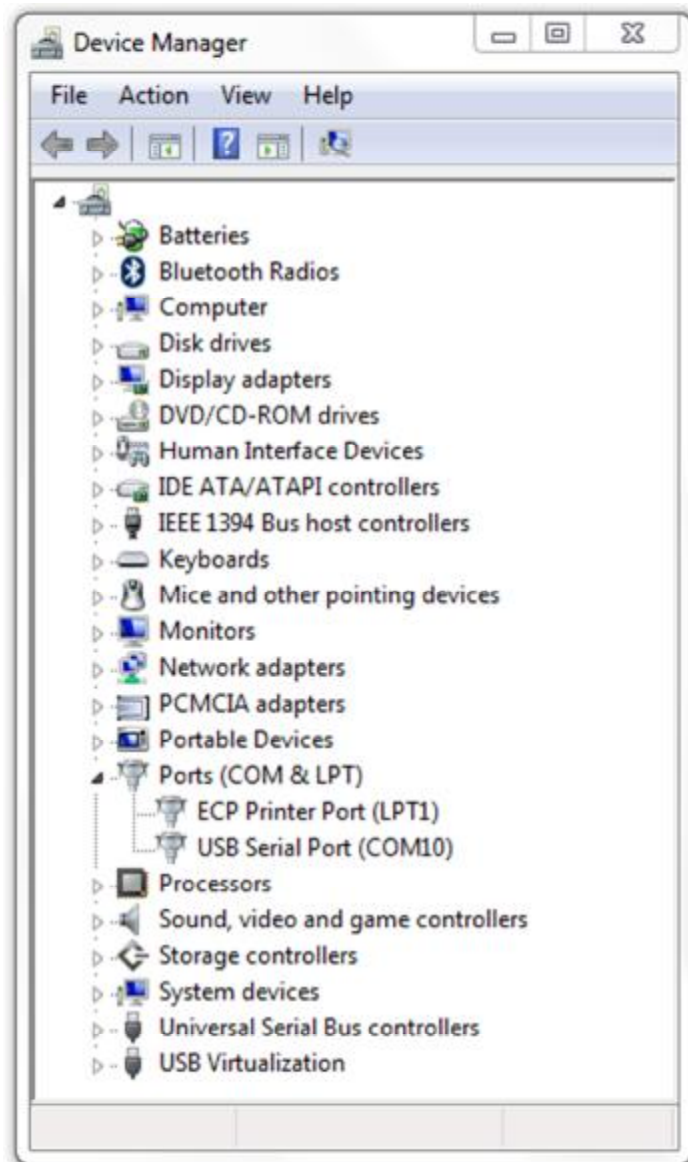
The details of how to find the correct COM port for your Instrument will vary depending upon the Operating System you are using, however the basic principal will work with all Operating Systems.

Firstly, without your [Instrument](#) connected, open Device Manager from the Control Panel and expand the **Ports (COM & LPT)** section to show the currently connected ports.



Device Manager - No Instrument connected

Now connect your Instrument and wait for your computer to recognise it. You should see a new COM port listed in the Device Manager. In this case, the Instrument appears as **USB Serial Port (COM10)**.



Device Manager - Instrument on COM10

In this case, when [Downloading](#) or [Uploading](#) to this Instrument, COM10 is the correct COM port to use. If you encounter problems communicating with your Instrument, make sure the [Communications settings](#) are correct.

Preview

Preview

The download Preview can be selected from the Download window.



Download window

Preview allows you to review and edit the downloaded data prior to adding it to the database. You can edit the details of a test, delete a test and replace all occurrences of a site or location name in the data.

Process processes the download data into the current database.

Cancel closes the Preview and does not process the data.

Duplicate Assets

Duplicate Assets

When [Downloading from your tester](#), if duplicate items exist PATGuard 3 will alert you and ask you to confirm what action you would like to take.

Uploading to your tester

Uploading to your tester

To Upload to your tester, first [configure your Test Instrument](#). Then select **Upload from tester** from the [Data Transfer](#) menu.



Data Transfer - Upload

This will open the Upload window.

Destination: Seaward PrimeTest 350 1234-56

COM Port: COM13 Settings...

Client: Client 1

Site: Site 1

Location: Location 1

Visual only

OK Cancel

Upload window

Select the [Instrument](#) you wish to upload to, the [COM port](#) used and the data you wish to upload and select **OK**. If you need to change the COM port settings, select **Settings...**

Test Instrument

Communications

Bits per second: 9600

Data bits: 8

Parity: None

Stop bits: 2

OK Cancel

COM port settings window

Apollo Upload

If you are uploading to an Apollo Instrument there are additional options to choose from in the Upload window, including the **Unit Drive** (the location of your Apollo drive) and which data to include in the Upload.



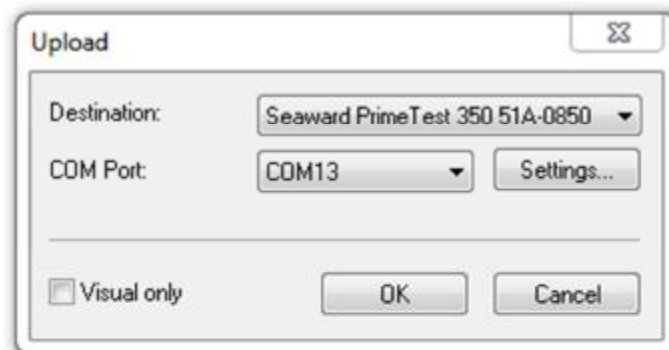
Apollo Upload window

Uploading configuration data

Uploading configuration data

To Upload configuration data to your tester, first [configure your Test Instrument](#). Then right-click on the item you wish to Upload to your tester and select **Upload Site Names...**, **Upload Location Names...** etc. from the menu. This will open the Upload window.

Select the [Instrument](#) you wish to upload to and the [COM port](#) used (if applicable) and select **OK**.



Upload Configuration Data window

Export to File

Export to File

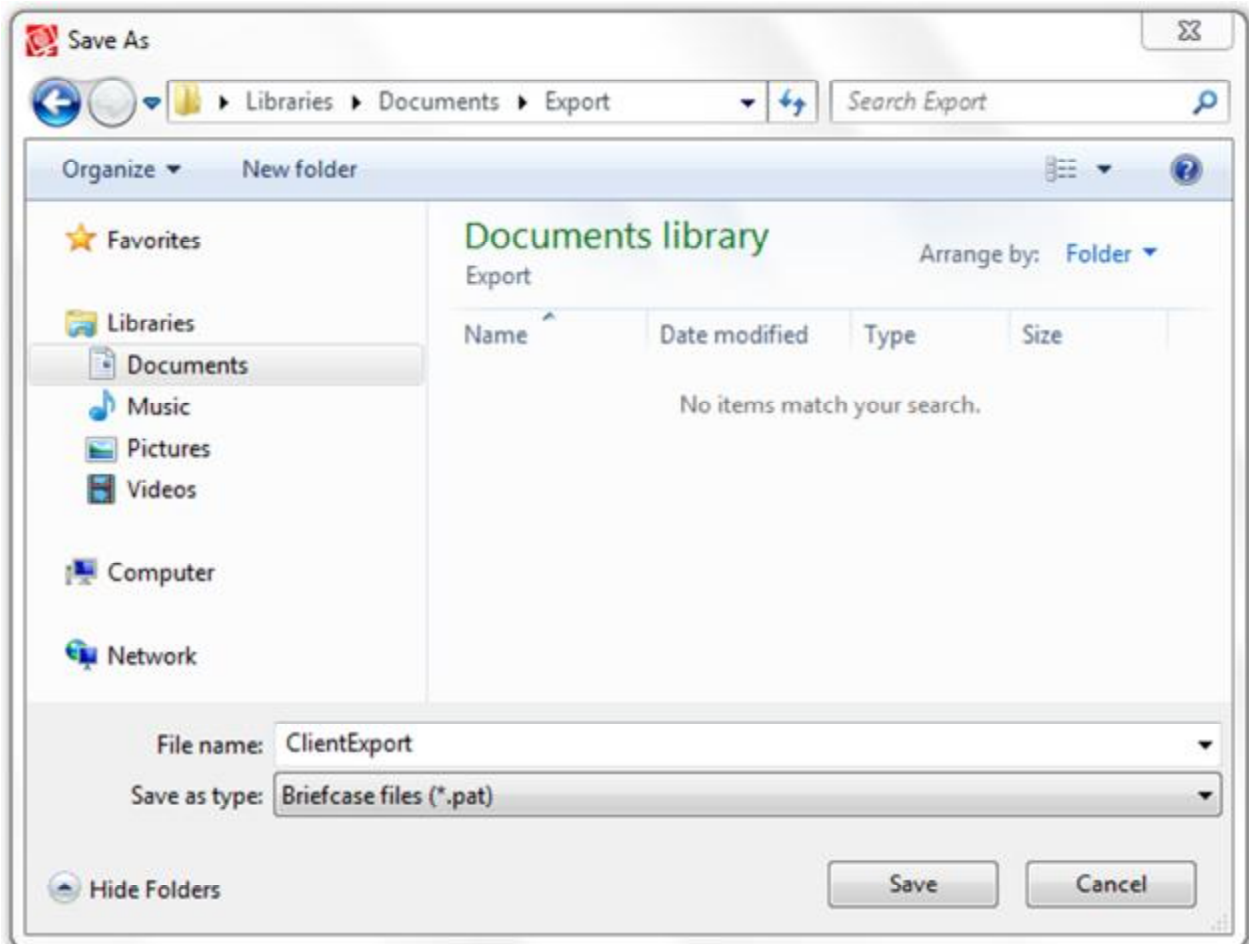
Data in the PATGuard 3 database can be exported to either a [.pat Briefcase](#) file or a [.csv Spreadsheet](#). See also [Open an existing file](#).

To Export to a File, select the [Client](#), [Site](#) or [Location](#) you wish to export from the [Tree View](#). Alternatively, to export a single [Asset](#) or [Hazard](#), select that Asset or Hazard in the [Main Window](#). Select to **File** from the [Data Transfer](#) menu.



Data Transfer Menu - Export

This will open the Save As window, which allows you to browse to the location you wish to export the file to.



Save As window

Exporting to .pat file

To export to a .pat file, select Briefcase files (*.pat) from the **Save as type:** drop-down box. .pat files can be used to transfer sections of the database to other PATGuard users.

Exporting to .csv file

To export to a .csv file, select Spreadsheet (*.csv) from the **Save as type:** drop-down box. .csv files can be opened and edited in programs such as Microsoft Excel.

NB: .csv exports do not include photos or risk assessments

Email

Email

Data in the PATGuard 3 database can be exported via email.

To Export to Email, select the [Client](#), [Site](#) or [Location](#) you wish to export from the [Tree View](#). Alternatively, to export a single [Asset](#) or [Hazard](#), select that Asset or Hazard in the [Main Window](#). Select **Email** from the [Data Transfer](#) menu.



Data Transfer Menu - Export

This will open a new email in your default email program with the data you selected attached as a .pat file.

See also [Open an existing file](#) for details on how to open a .pat file.

Backing up your database

Backing up your database

To avoid losing data if anything happens to your PC, we recommend regularly backing up your PATGuard 3 database.

Making a backup copy of your database

To make a backup of you database:

1. Close PATGuard 3 if it is open.
2. Open an Explorer window and browse to the location you specified when [Setting up your database](#).
3. Right-click on the PATGuard 3 database file to bring up the context menu. Select **Copy**.
4. Browse to the location you wish to backup the database to, for example a memory stick or external hard drive. Right-click to bring up the context menu and select **Paste**.

You may alternatively choose to burn a copy of your database to a CD or DVD, or use one of the many on-line backup services to secure your valuable data.

Seaward recommends backing up your database on a regular basis, at least weekly if you use PATGuard 3 on a regular basis.

Restoring your database from a backup copy

To restore a database from a backup copy:

1. Copy the backup database to a suitable location on your PC.
2. Open the backup database following the procedure in [Select an existing database](#).

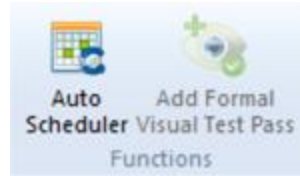
Auto Scheduler

Auto Scheduler

The Auto Scheduler function of PATGuard 3 is accessible from the [Functions Menu](#) and provides a way to schedule testing based on a set of trigger conditions. The main features of the Auto Scheduler are as follows:

- [Setting up a schedule](#)
 - [Local launch](#)
 - [Remote launch](#)
- [Viewing a schedule](#)
- [Uploading a schedule](#)

- [Printing a task checklist](#)



Functions Menu - Auto Scheduler

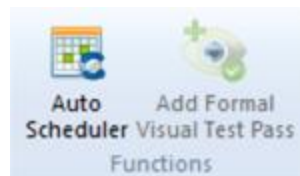
When a database with an Auto Scheduler configuration is closed in PATGuard 3 a check is run on that database by PATGuard e-Scheduler (running in the PATGuard e-Manager program on the system tray). If the trigger conditions are met the configured action is taken. You can check the action taken by double clicking on the PATGuard e-Manager icon on the system tray to view its message log.

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

Setting up a schedule

Setting up a schedule

To set up an [Auto Schedule](#), switch to the [PAT Testing](#) function and select a [Client](#), [Site](#) or [Location](#) from the [Tree View](#) in the [Navigation Pane](#). Select **Auto Scheduler** from the [Functions Menu](#) to open the Auto Scheduler window.



Functions Menu - Auto Scheduler

Auto Scheduler window

The Auto Scheduler window allows you to select the Client Name, Site Name and Location Name that you wish to run an Auto Schedule for.

Auto Scheduler window

Schedule launch settings

Exclude this level excludes this part of the database from [Auto Schedules](#). Sub-levels may be included if they have their own Auto Scheduler configuration. For example, it is possible to exclude a [Client](#) but have the [Auto Scheduler](#) configured for the [Sites](#) below that Client.

Defer up to next level takes the [Auto Scheduler](#) configuration from the level above. For example, all [Locations](#) at a [Site](#) could use the Auto Scheduler configuration for the Site.

Launch schedule when trigger conditions are met is used to configure particular Auto Scheduler actions for this level of the database. The options are [Local launch](#) or [Remote launch](#).

Local launch

If a local schedule is triggered then the next time the database is opened a message will be displayed to say that a new schedule is available. The schedule can be [viewed](#), [uploaded](#) or [printed](#).

Remote launch

If a remote schedule is triggered an email [Report](#), similar to the Concise Task Report, will be sent as configured in the [Configure Email window](#). PATGuard e-Manager can be used to configure the email account to be used.

Configure Email window

The Configure Email window allows you to set the details of the email sent if a remote schedule is triggered. This includes the email address the message should be sent to (from the Address Book), the Reply To address, the subject and message, and the level of detail included in the email, including whether a quote is attached to the email.

Configure Email window

Trigger Conditions

Test type allows you to select whether the trigger should be based on Full tests only or Visual tests only.

If **All overdue** is selected, a trigger will occur only if all [Assets](#) are overdue at this branch of the database.

If **Any overdue within period** is selected, a trigger will occur if there are any overdue [Assets](#) at this branch of the database within the time specified.

If **Percentage overdue** is selected, a trigger will occur if more than the specified percentage of [Assets](#) are overdue at this branch of the database.

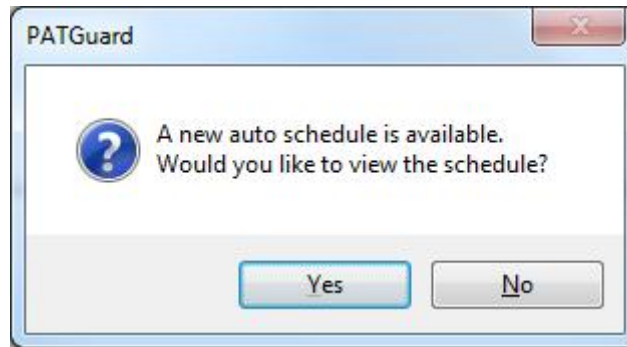
Pre Trigger allows you to specify the number of weeks in advance of the trigger becoming true you would like the schedule to be generated (e.g. 4 weeks before all items are overdue).

Viewing a schedule

Viewing a schedule

When a database with an [Auto Scheduler](#) configuration is closed in PATGuard 3 a check is run on that database by PATGuard e-Scheduler (running in the PATGuard e-Manager program on the system tray). If the trigger conditions are met the configured action is taken. You can check the action taken by double clicking on the PATGuard e-Manager icon on the system tray to view its message log.

If a [local schedule](#) is triggered then the next time the database is opened in PATGuard 3 a message will be displayed to say that a new schedule is available.



Auto Schedule notification

The schedule can be viewed, [printed](#) or [uploaded](#). To view the Auto Schedule, select **Display** from the [Auto Schedule](#) menu on the [File menu](#).



Auto Schedule menu

If a remote schedule is triggered then an email report, similar to the Concise Task Report, will be dispatched as configured in the [Configure Email window](#). PATGuard e-Manager can be used to configure the email account to be used.

Uploading a schedule

Uploading a schedule

To Upload the data associated with an [Auto Schedule](#), select **Upload** from the [Auto Schedule](#) menu on the [File menu](#). You can choose to **Upload Full Tests** or **Upload Visual Tests**.

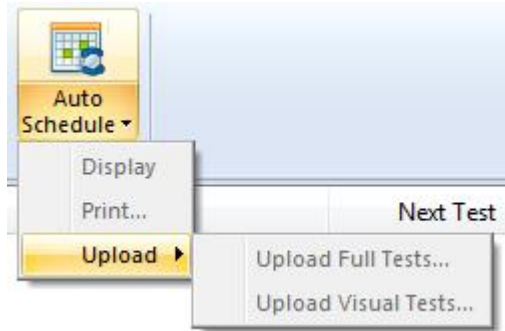


Auto Schedule menu

Printing a task checklist

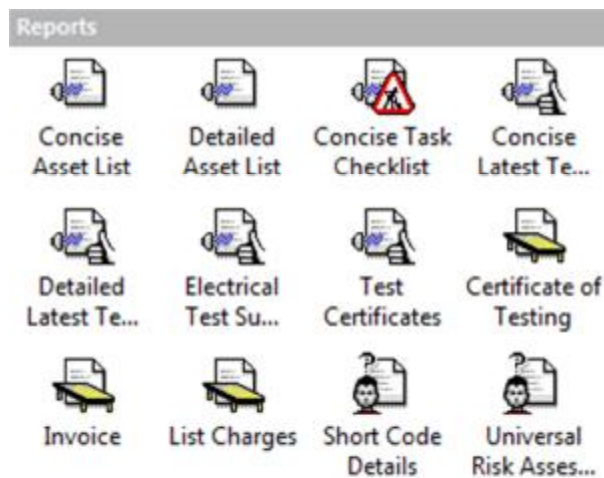
Printing a task checklist

A Task Checklist can be printed by selecting **Print...** from the [Auto Schedule](#) menu on the [File menu](#).



Auto Schedule menu

You can also print a Task Checklist by running a Concise Task Checklist [Report](#).



Navigation Pane - Available Reports

Support

Support

If you are having problems using PATGuard 3 software and cannot find an answer to your question in the Help file then you can [contact Seaward](#).

To keep up to date with the latest PATGuard 3 news, get support from the Seaward team and other PATGuard 3 users, or to make suggestions for how we could improve PATGuard 3, please visit our online [forum](#).

If you require technical support on any other Seaward products please visit our [website](#) which holds a bank of information on our testers, software and electrical safety testing in general.

Licensing

For specific queries about the PATGuard 3 licence, please refer to the following sections:

- [Licence FAQs](#)
- [Licence Renewal](#)
- [Licence Agreement](#)

Licence FAQs

Licence FAQs

[How long is left on my licence?](#)

[How many PCs can the licence be used on?](#)

[How do I transfer the licence?](#)

[How do I extend my licence?](#)

[How do I buy an additional licence?](#)

[What happens when my licence expires?](#)

How long is left on my licence?

Select **Licence...** on the [About Screen](#) to open the Licence Viewer. The Licence Viewer will display a list of Modules, including PATGuard 3. Next to the PATGuard 3 Module will be a licence expiry date.

How many PCs can the licence be used on?

Each licence is for one [standalone PC](#) or [network Server](#) only. If used on a network Server the user will have a 'floating' licence that can be used on any PC on the network that has followed the instructions on the [Installing on a network Workstation](#) page.

How do I transfer the licence?

To transfer your licence to a different PC, select **Deactivate Licence from this PC...** at the Login screen.



Login screen

PATGuard 3 will contact the Activation Service to deactivate your licence. Click **Close** when done.



Online Deactivation

To reactivate on the same PC, select **Reactivate Existing Serial Number** on the login screen.



Login screen after deactivation

How do I extend my licence?

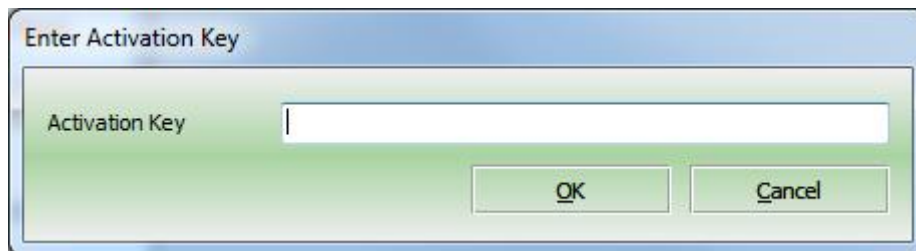
During the last 30 days of your licence you will be shown the number of days remaining when you start PATGuard 3 and be given a link to follow to renew your licence. After expiry you will be reminded that the licence has expired. See [What happens when my licence expires.](#)

When you have purchased a new Activation Key, select **Apply Renewal Key** on the login screen.



Login Screen

Enter your Activation Key on the following screen and select **OK**.



Enter Activation Key

How do I buy an additional licence?

Additional Licences are only available to customers that already have a valid (not expired) licence. Customers should contact their Distributor or Seaward directly for more information.

What happens when my licence expires?

PATGuard 3 will become read-only until the licence is renewed. You will have view-only access to all data but will not be able to use any of the PATGuard 3 features.

Licence Renewal

Licence Renewal

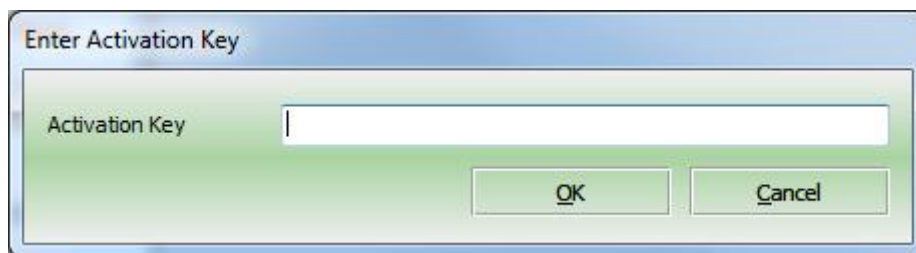
Renewing on a PC with internet access

To renew on a PC with internet access, select **Apply Renewal Key Renew** on the login screen.



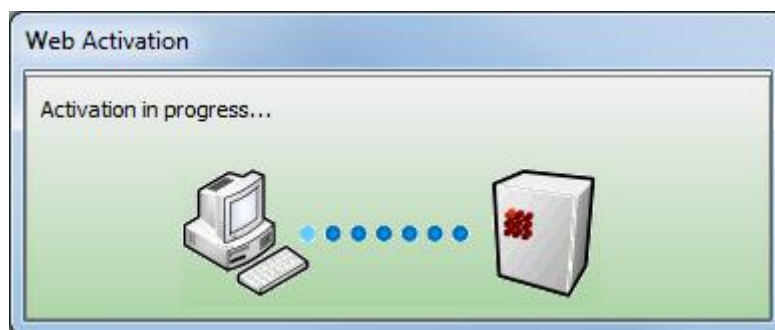
Login Screen

Enter your renewal key in the following screen and select **OK**:



Enter Activation Key

PATGuard 3 will contact the Activation Service to verify your Activation Key:



Activation in progress

You will receive confirmation that Activation has completed successfully:



Activation Successful

Renewing on a PC without internet access

To renew on a PC without internet access, please [contact Seaward](#) to receive a renewal Activation Key.

Licence Agreement

Licence Agreement

The licence agreement for PATGuard 3 can also be viewed from the [About Screen](#).

Licence Agreement

Seaward Electronic Limited

Software Licence

IMPORTANT NOTICE - PLEASE READ THESE TERMS CAREFULLY BEFORE INSTALLING THE SOFTWARE.

This licence agreement (**Licence**) is a legal agreement between you (**you** or **your**) and Seaward Electronic Limited of 18 Bracken Hill, South West Industrial Estate, Peterlee, County Durham, SR8 2SW with company number 01674384 (**us**, **we** or **our**) for:

- PATGuard 3 computer software (**Software**); and
- related materials and documentation (**Documentation**).

We licence use of the Software and Documentation to you on the basis of this Licence. We do not sell the Software or Documentation to you. We remain the owners of the Software and Documentation at all times.

This Licence applies to any trial use of the Software and Documentation, and any subsequent purchase of the Software and Documentation.

Important notice to all users

1. By trialling, downloading, installing, ordering and using the Software through our website at www.seaward.co.uk (**Website**) you agree to the terms of this Licence which will bind you (and your employees where relevant). **The terms of this Licence include, in particular, limitations on liability in condition 7.**

2. If you do not agree to the terms of this Licence, we will not license the Software and Documentation to you and you will not be able to continue with the download and installation process.
3. Please note that the Seaward Returns Policy does not apply to the purchase of Software and Documentation. You have the right to cancel your transaction without charge and without reason before confirming your purchase of the Software or Documentation. However, you will lose your right to cancel your transaction once you accept this Licence as part of the purchase process. This will not affect any consumer rights in respect of defective downloaded Software or Documentation purchased through our Website.

You should print a copy of these Licence arrangements for future reference.

1. **Supply of the Software**

- 1.1 For the steps you need to take to arrange a trial and to place an order for the Software and Documentation through our Website, please visit www.seaward.co.uk/patguard3.
- 1.2 Our order process allows you to check and amend any errors before submitting your order to us. Please take the time to read and check your order at each page of the order process.
- 1.3 After you place an order, you will receive an email from us acknowledging that we have received and accepted your order.
- 1.4 Our email will also confirm the details of the Software and contain a link from which the Software and Documentation can be downloaded or provide an authorisation code following your trial of the Software (**Order Confirmation**). The Contract between us will only be formed when we send you the Order Confirmation.

2. **Grant and Scope of Licence**

- 2.1 In consideration of the payment of the licence fee for the Software and Documentation (**Fee**), we hereby grant to you a non-exclusive, non-transferable licence to download and use the Software and the Documentation on the terms of this Licence only for the duration set out in the Order Confirmation.
- 2.2 You may:
 - 2.2.1 install and use the Software for your personal purposes (if you are a consumer) or your internal business purposes (if you are a business) only on one computer;
 - 2.2.2 provided it is used on only one computer at any one time, transfer the Software from one computer to another by following the procedure on our Website;

- 2.2.3 provided you comply with the provisions in condition 3.1, make one (1) copy of the Software for back-up purposes;
 - 2.2.4 receive and use any free supplementary software code or update of the Software incorporating "patches" and corrections of errors as may be provided by us from time to time;
 - 2.2.5 use any Documentation in support of the use permitted under condition 2.2 and make one (1) copy of the Documentation as reasonably necessary for its lawful use.
- 2.3 The Software requires the following minimum system requirements for its operation:
- 2.3.1 1 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor;
 - 2.3.2 1 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit);
 - 2.3.3 16 GB available hard disk space (32-bit) or 20 GB (64-bit);
 - 2.3.4 DirectX 9 graphics device with WDDM 1.0 or higher driver;
 - 2.3.5 .Net 4.0.
- 2.4 You acknowledge and agree that where your systems utilise Microsoft software, the Software can only be supported by us where such Microsoft software and systems continue to be supported by Microsoft.
3. **Restrictions**
- 3.1 Except as expressly set out in this Licence or as permitted by any local law, you undertake:
- 3.1.1 not to copy the Software or Documentation except where such copying is incidental to normal use of the Software or where it is necessary for the purpose of back-up or operational security;
 - 3.1.2 not to sell, rent, lease, sub-license, loan, translate, merge, adapt, vary or modify the Software or Documentation;
 - 3.1.3 not to make alterations to, or modifications of, the whole or any part of the Software nor permit the Software or any part of it to be combined with, or become incorporated in, any other programs;
 - 3.1.4 not to disassemble, de-compile, reverse engineer or create derivative works based on the whole or any part of the Software nor attempt to do any such things except to the extent that (by virtue of section 296A of the Copyright, Designs and Patents Act 1988) such actions cannot be prohibited because they are essential for the purpose of achieving inter-

operability of the Software with another software program, and provided that the information obtained by you during such activities:

- 3.1.4.1 is used only for the purpose of achieving inter-operability of the Software with another software program;
- 3.1.4.2 is not disclosed or communicated without our prior written consent to any third party to whom it is not necessary to disclose or communicate it; and
- 3.1.4.3 is not used to create any software which is substantially similar to the Software;
- 3.1.5 to keep all copies of the Software secure and to maintain accurate and up-to-date records of the number and locations of all copies of the Software;
- 3.1.6 to supervise and control use of the Software and ensure that the Software is used by your employees and representatives (where appropriate) in accordance with the terms of this Licence;
- 3.1.7 to include our copyright notice on all entire and partial copies of the Software in any form; and
- 3.1.8 not to provide, or otherwise make available, the Software in any form, in whole or in part (including, but not limited to, program listings, object and source program listings, object code and source code) to any person other than your employees without prior written consent from us.

4. **How to Pay**

- 4.1 The Fee for the Software and Documentation shall be as set out on our Website from time to time.
- 4.2 You shall pay to us the Fee as set out in the Order Confirmation, in advance, by PayPal or by debit and credit card. We accept the following cards: Visa, Visa Credit, Visa Debit, Purchasing Card and MasterCard.
- 4.3 All sums payable under this Licence are exclusive of VAT or any other relevant local sales taxes, for which you shall be responsible.
- 4.4 If you fail to pay any amount payable to us under this Licence, we may charge you interest on the overdue amount (payable immediately on demand) from the due date for payment up to the date of actual payment at the rate of 4% per annum above the base rate for the time being of the Bank of England. Such interest shall accrue on a daily basis and shall be compounded quarterly. As an alternative, and at our sole discretion, we may also claim interest under the Late Payment of Commercial Debts (Interest) Act 1998.

5. Intellectual Property Rights

- 5.1 You acknowledge that all intellectual property rights in the Software and the Documentation throughout the world belong to us (or our licensors), that rights in the Software are licensed (not sold) to you, and that you have no rights in, or to, the Software or the Documentation other than the right to use them in accordance with the terms of this Licence.
- 5.2 You acknowledge that you have no right to have access to the Software in source code form or in unlocked coding or with comments.

6. Limited Warranty

- 6.1 We warrant that:
- 6.1.1 the Software will, when properly used and on an operating system for which it was designed, perform substantially in accordance with the functions described in the Documentation; and
- 6.1.2 that the Documentation correctly describes the operation of the Software in all material respects
- for a period of 90 days from the date of purchase of the Software and confirmation of acceptance of this Licence (**Warranty Period**).
- 6.2 If, within the Warranty Period, you notify us in writing of any defect or fault in the Software as a result of which it fails to perform substantially in accordance with the Documentation, we will, at our sole option, either repair or replace the Software.
- 6.3 The warranty does not apply:
- 6.3.1 if the defect or fault in the Software results from you having amended the Software;
- 6.3.2 if the defect or fault in the Software results from you having used the Software in contravention of the terms of this Licence;
- 6.3.3 if the defect or fault in the Software results from damage to the Software or your computer caused after you have downloaded the Software;
- 6.3.4 if the defect or fault in the Software results from installation on a system that is no longer supported by Microsoft; or
- 6.3.5 during any trial of the Software prior to purchase.
- 6.4 The Software may be used in conjunction with hardware supplied by third parties. Please refer to the manufacturer's guarantee (where relevant) for details.

6.5 If you are a consumer, this warranty is in addition to your legal rights in relation to Software that is faulty or not as described. Advice about your legal rights is available from your local Citizens' Advice Bureau or Trading Standards office.

7. **Limitation of Liability**

7.1 You acknowledge that the Software has not been developed to meet your individual requirements, and that it is therefore your responsibility to ensure that the facilities and functions of the Software as described in the Documentation meet your requirements.

7.2 If you are a business customer, we only supply the Software and Documentation for internal use by your business, and you agree not to use the Software or Documentation for any re-sale purposes.

7.3 We shall not under any circumstances whatever be liable to you, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, arising under or in connection with the Licence for:

7.3.1 loss of profits, sales, business, or revenue;

7.3.2 business interruption;

7.3.3 loss of anticipated savings;

7.3.4 loss or corruption of data or information;

7.3.5 loss of business opportunity, goodwill or reputation; or

7.3.6 any indirect or consequential loss or damage.

7.4 Other than the losses set out in condition 7.3 (for which we are not liable), our maximum aggregate liability under or in connection with this Licence whether in contract, tort (including negligence) or otherwise, shall in all circumstances be limited to a sum equal to 100% of the Licence Fee. This maximum cap does not apply to condition 7.5.

7.5 Nothing in this Licence shall limit or exclude our liability for:

7.5.1 death or personal injury resulting from our negligence;

7.5.2 fraud or fraudulent misrepresentation;

7.5.3 any other liability that cannot be excluded or limited by English law.

7.6 This Licence sets out the full extent of our obligations and liabilities in respect of the supply of the Software and Documentation. Except as expressly stated in this Licence, there are no conditions, warranties, representations or other terms, express or implied, that are binding on us. Any condition, warranty, representation or other term concerning the supply of the Software and

Documentation which might otherwise be implied into, or incorporated in, this Licence whether by statute, common law or otherwise, is excluded to the fullest extent permitted by law.

7.7 If you are a consumer, we are only responsible for loss or damage you suffer that is a foreseeable result of our breach of this Licence or our negligence up to the amount specified in condition 7.4, but we are not responsible for any loss or damage that is not foreseeable. Loss or damage is foreseeable if they were an obvious consequence of our breach or if they were contemplated by you and us at the time we granted you the Licence.

8. **Duration and Termination**

8.1 Unless terminated earlier in accordance with this condition 9, the Licence shall continue for the duration set out in the Order Confirmation, when it shall automatically terminate.

8.2 We may terminate this Licence immediately by written notice to you if you commit a material or persistent breach of this Licence which you fail to remedy (if remediable) within 14 days after the service of written notice requiring you to do so.

8.3 We may terminate this Licence where the Software has been installed on a system operating Microsoft software, and that Microsoft software is no longer supported by Microsoft.

8.4 Upon termination for any reason:

8.4.1 all rights granted to you under this Licence shall cease;

8.4.2 you must immediately cease all activities authorised by this Licence;

8.4.3 you must immediately pay to us any sums due to us under this Licence; and

8.4.4 you must immediately delete or remove the Software from all computer equipment in your possession and immediately destroy or return to us (at our option) all copies of the Software then in your possession, custody or control and, in the case of destruction, certify to us that you have done so.

9. **Communications Between Us**

9.1 If you are a consumer, if you wish to contact us in writing, or if any condition in this Licence requires you to give us notice in writing, you can send this to us by e-mail or by pre-paid post to Seaward Electronic Limited at software@seaward.co.uk. We will confirm receipt of this by contacting you in writing, normally by e-mail.

9.2 If we have to contact you or give you notice in writing, we will do so by e-mail or by pre-paid post to the address you provide to us in your order for the Software.

9.3 If you are a business customer, please note that any notice given by you to us, or by us to you, will be deemed received and properly served immediately when posted on our website, 24 hours after an e-mail is sent, or three days after the date of posting of any letter. In proving the service of any notice, it will be sufficient to prove, in the case of a letter, that such letter was properly addressed, stamped and placed in the post and, in the case of an e-mail, that such e-mail was sent to the specified e-mail address of the addressee.

10. **Events Outside Our Control**

10.1 We will not be liable or responsible for any failure to perform, or delay in performance of, any of our obligations under this Licence that is caused by an Event Outside Our Control. An Event Outside Our Control is defined below in clause 10.2.

10.2 An **Event Outside Our Control** means any act or event beyond our reasonable control, including without limitation failure of public or private telecommunications networks.

10.3 If an Event Outside Our Control takes place that affects the performance of our obligations under this Licence:

10.3.1 our obligations under this Licence will be suspended and the time for performance of our obligations will be extended for the duration of the Event Outside Our Control; and

10.3.2 we will use our reasonable endeavours to find a solution by which our obligations under this Licence may be performed despite the Event Outside Our Control.

11. **Other Important Terms**

11.1 We may transfer our rights and obligations under this Licence to another organisation, but this will not affect your rights or our obligations under this Licence.

11.2 You may only transfer your rights or your obligations under this Licence to another person if we agree in writing.

11.3 If you are a business customer, this Licence and any document expressly referred to in it constitutes the entire agreement between you and us. You acknowledge that you have not relied on any statement, promise or representation made or given by or on behalf of us which is not set out in this Licence or any document expressly referred to in it.

11.4 If we fail to insist that you perform any of your obligations under this Licence, or if we do not enforce our rights against you, or if we delay in doing so, that will not mean that we have waived our rights against you and will not mean that you do not have to comply with those obligations. If

we do waive a default by you, we will only do so in writing, and that will not mean that we will automatically waive any later default by you.

- 11.5 Each of the conditions of this Licence operates separately. If any court or competent authority decides that any of them are unlawful or unenforceable, the remaining conditions will remain in full force and effect.
- 11.6 If you are a consumer, please note that this Licence, its subject matter and its formation, are governed by English law. You and we both agree to that the courts of England and Wales will have non-exclusive jurisdiction. However, if you are a resident of Northern Ireland you may also bring proceedings in Northern Ireland, and if you are resident of Scotland, you may also bring proceedings in Scotland.
- 11.7 If you are a business customer, this Licence, its subject matter and its formation (and any non-contractual disputes or claims) are governed by English law. We both agree to the exclusive jurisdiction of the courts of England and Wales.
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