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PATDRS

DOWNLOAD & REPORTING SOFTWARE

USER GUIDE

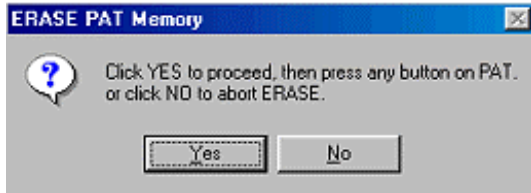
FOR MODEL 5080 & 6080
PORTABLE APPLIANCE TESTERS

VERSION 2.00



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Click YES to proceed or NO to abort - the screen shown below will appear :




Press any button on PAT to allow the computer to erase the memory.



Progress will be displayed, followed by a success message :



 Ensure PAT has been downloaded prior to using this function, as all data will be erased.

About PATDRS

Check the version and release date of the currently installed software.

Introduction

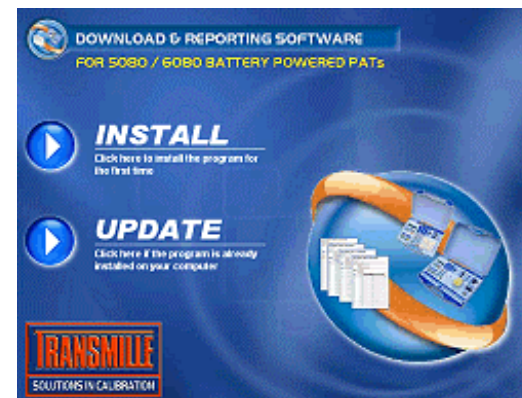
The PAT Download & Reporting Software provides easy to use tools to download data from the Transmille range of PATs and produce fully formatted professional looking reports in seconds.

The program also includes the ability to use the DYMO 'LabelWriter' range of thermal label printers to print appliance test labels.



THIS SOFTWARE IS PROTECTED BY A SOFTWARE SECURITY KEY (SUPPLIED) WHICH PLUGS INTO ANY FREE USB PORT ON YOUR PC. THE SOFTWARE WILL NOT RUN WITHOUT THIS KEY PLUGGED INTO YOUR COMPUTER

Installing the software

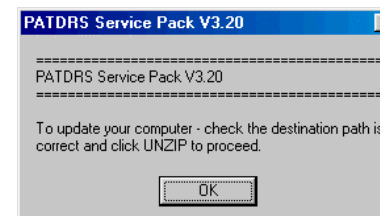


To install the software, insert the CD into the disc drive – the CD browser will be displayed as show left

Select **INSTALL** to install the software for the first time – then follow the on screen instructions.



Click on the button shown left to begin the full install.



Select **UPDATE** if the software is already installed – this will update to the latest version.

Click on the button as shown left to begin the update, the click UNZIP to proceed.

Running the software for the first time

Once installed, the program can be launched by using the Start button and choosing PAT Download & Reporting Software :



The program will start, and perform a check to ensure the software security key is inserted a USB port – if this key is missing the following message will be displayed :



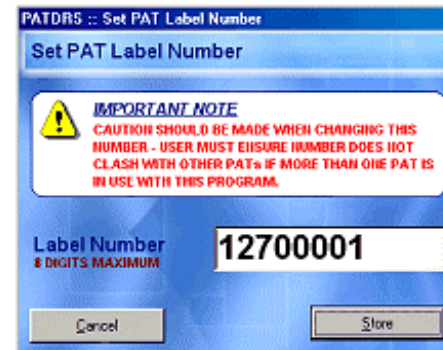
To run the software, click OK to close this message and insert the software key.

Restart the software and the software will proceed to the startup screen.



The first time the software is run, the COM port the PAT is connected to will be requested.

Press any button on PAT to allow the computer to read the label number (click Abort to cancel and return to main menu) :



Change label number as required then click Store to save or Cancel to abort.



The label number must be a number only with a maximum of 8 digits.



Ensure the number entered will not clash with other PATs if more than one PAT is in use on the same computer. The program will check to ensure the number has not been used already

Enable PAT Memory

Firstly ensure the PAT is OFF and is connected using the data cable.

Selecting this function performs the following actions :

- Enables the memory function to **allow test data to be saved in memory**
- Enables the **appliance list** select function at the beginning of a test
- Enables the **option to discard failed tests** (on completion of a test).

Disable PAT Memory

Turns off the options as detailed above

ERASE PAT Memory

To manually erase the PAT memory of all tests saved use this function. Firstly ensure the PAT is OFF and is connected using the data cable. Click on the ERASE PAT Memory menu item – the following confirmation message will appear.



Change time / date as required then click Store to save or Cancel to abort without saving.

i Note : The time is in the format **HH:MM**
The date format is **DD/MM/YYYY**

Set PAT Label Number

The PAT is supplied set to a label number which is comprised of the serial number digits plus a five digit number, e.g.

If Serial number is 123F5 the label number will start at 12300001

This ensures that the number is unique if more than one PAT is downloaded on the same computer.

If it is required to change this label number, firstly ensure the PAT is OFF and is connected to the computer using the data cable.

Click on the Set PAT Label Number menu item – the following screen will appear :

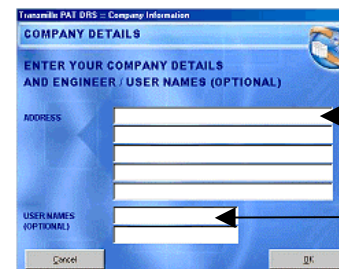


Simply select the COM port from the drop down list and click OK.

i If an incorrect COM port is selected, the PAT will not be detected. To change the COM port at any time use the Setup function from the main menu.

? *How do I know which COM port to choose?*
Choose COM 1 if you PC only has one COM port. If your PC only has USB connections, you will need a USB to Serial converter lead.

The company name and user names will also be requested. This allows the reports to include your specific company details :

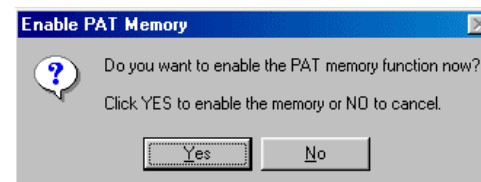


ENTER COMPANY
NAME & ADDRESS
HERE

ENTER UP TO 2 USER /
ENGINEER NAMES
HERE

i Note : This information can be changed later using the setup function.

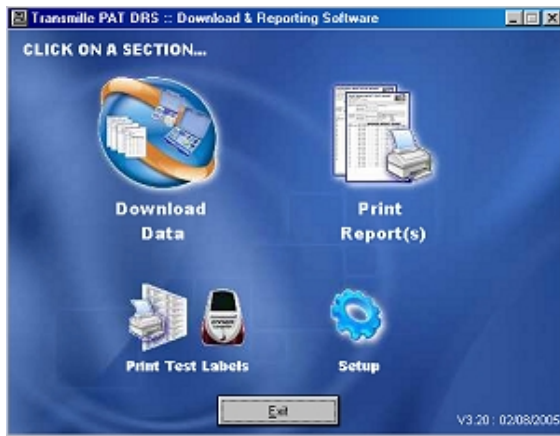
The following message will be displayed the first time the software is run :



To enable the memory function make sure the PAT is connected to the PC using the supplied data lead. Click YES to enable, the press any button on the PAT to proceed.

Once this information is entered, the main menu will be displayed.
All major functions are accessible from this screen :

Main Menu



The main menu provides access to the following functions :

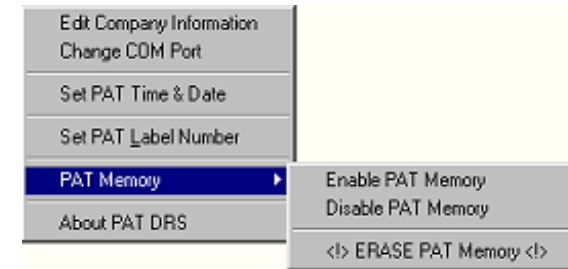
- Download Data
- Set Appliance Location / Address
- Print/Preview Report
- Print Test Labels
- Setup

Edit Company Details
Change COM Port
Set PAT Time & Date
Set PAT Label Number
PAT Memory *Enable PAT Memory*
 Disable PAT Memory
 <!> *ERASE PAT Memory* <!>
About PATDRS

Setup Function



The setup function provides access to the following :



Edit Company Information

Change the details of your company, and edit engineer / user names.

Change COM port

Change the COM port used to communicate with the PAT.



Select a new COM port and click OK.
If port is in use or not available a message will be displayed. Select an available port or click cancel to discard changes.

Set PAT Time & Date

The PAT is supplied set correct for the region you are in. If it is required to change the time or date use this function.

To use this function, firstly ensure the PAT is OFF and is connected to the computer using the data cable.

Click on the Set PAT Time & Date menu item – the following screen will appear :



Press any button on PAT to allow the computer to read the time & date (click Abort to cancel and return to main menu) :



If you do not print labels when you begin to use the PAT, the 'start from number' will need to be checked to ensure it matches the number stored in the PAT

Enter the user name to be printed on the label (if required), and check the footer text for the label is ok (this is saved when this screen is returned to)
Check the date is OK and set the label quantity and simply click Print Labels.



To add your company logo to the test label, use the software supplied with the DYMO printer to edit the label template named **Safety Test Label.LWL**

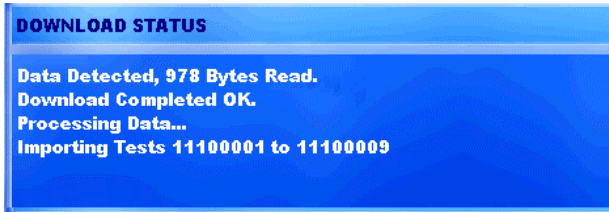
Download Data Function



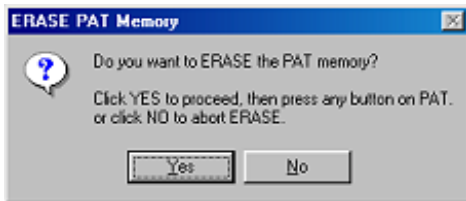
The download function allows the data from one or more PATs to be downloaded from the PAT to the main database stored on the PC.

Click on this menu item to proceed to the download screen.
Click Cancel to abort download.

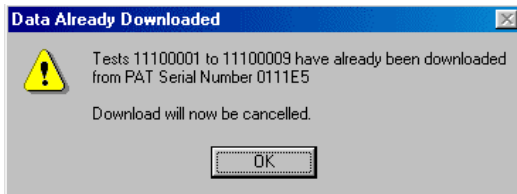
To begin the download, simply click any button on the PAT – the screen will change to display the data being read back :



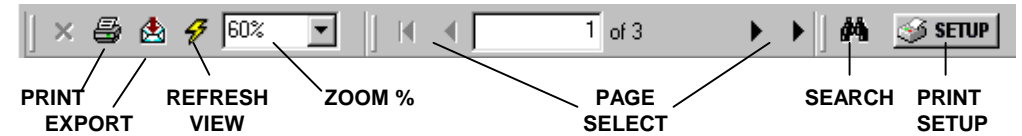
Following the download, the program will ask if you want to erase the PAT memory. Click Yes to erase the memory or No to abort the erase.



If the download function detects that the data has already been downloaded it will display a message similar to the following :



Printing a Report



To print a report from the preview screen, simply click on the printer button



To change the printer to use for printing click on the Printer setup button



To export data to another format (available export functions depend on programs installed on user computer) click the export button

Print Test Labels Function



This function requires the use of a DYMO LabelWriter thermal label printer (supplied separately)

Select the PAT serial number from the drop down list if available.



The first time this function is run, the program will ask for the PAT serial number.

This will display the automatic counter, which remembers the label number reached last time labels were printed.



Ensure the label number matches the label number stored in the PAT.
 The PATs are supplied new with the first number set to xxx00001 (where xxx is the PAT serial number, e.g. 11100001).

In these cases, the combine with group above button will be disabled to indicate this function is not possible.

When using the combine function on the test group shown below :

The screenshot shows the 'Print Report(s)' dialog box with a table of reports. The 'Combine With Group Above' dialog box is open, asking for confirmation to combine groups.

FIRST LABEL	END LABEL	DATE	TIME	PAT No.	ADDRESS/LOCATION
12300001	12300010	15/08/2005	18:03	123F5	?
12300011	12300020	15/08/2005	18:03	123F5	?
12300021	12300030	15/08/2005	18:03	123F5	?
12300031	12300040	15/08/2005	18:03	123F5	?
12300041	12300050	15/08/2005	18:03	123F5	?

Combine With Group Above dialog box content:

Combine groups :
 12300031 to 12300040
 12300041 to 12300050
 Into combined group
 12300031 to 12300050
 Are you sure?
 Yes No

Print Report(s) Function



The print report(s) function allows the user to set the address / location for a report, set the start and end label numbers for a report as well as preview on screen and/or print reports.

The main selection screen displays all test groups & reports available.

The screenshot shows the 'Print Report(s)' dialog box with a filtered list of reports. The 'VIEW BY' section is set to 'ADDRESS / LOCATION' and 'PAT SERIAL NUMBER'.

FIRST LABEL	LAST LABEL	DATE	TIME	PAT No.	ADDRESS/LOCATION
1000202	1000403	19/07/2005	13:54	999F9	?
1000404	1000605	19/07/2005	13:56	999F9	?
1000606	1000706	01/08/2005	11:07	999F9	TRANSMILLE LTD
11100616	11101109	16/07/2005	10:45	999F9	?

VIEW BY: ADDRESS / LOCATION (ALL ADDRESSES / LOCATIONS), PAT SERIAL NUMBER (999F9)

The 'View By' section allow the list to be 'filtered' to show only reports for a specific address / location, PAT serial number or a combination of the two.

VIEW BY: ADDRESS / LOCATION (ALL ADDRESSES / LOCATIONS), PAT SERIAL NUMBER (999F9)


To view all reports, select ALL ADDRESSES/LOCATIONS and ALL PATS



The PAT serial number list is only displayed when the system detects two or more PATS have been downloaded into the system.

Reports which have previously had an address / location selected are available for print / preview by highlighting the appropriate line and clicking the select button.


Test groups which do not have had an address / location defined are indicated by a ? in the address / location column. These start and End 'groups' can be modified as required to match the start and end numbers for a specific address / location.

 If the 'NEW LOCATION' function in the PAT set up menu has been used when performing testing at several sites, the start and End groups displayed will be correct. If the Start and End numbers have been recorded manually (using a worksheet), the Start and End groups may need to be manually divided to allow the displayed groups to match the start and End numbers recorded on the worksheet

Dividing a group

Select the line which contains the first and last label number group which needs to be divided into separate 'sub groups'. Click the divide button and the following screen will appear :

The divide group screen shows the original group Start and End numbers, and allows this original group to be divided into up to 10 'sub groups'

 The program will check to ensure valid numbers have been entered into the available boxes and display a warning if invalid numbers are detected.

Once all the groups required are set, click on the Divide button to apply this selection.

The list will be updated to display the new groups, ready for the address / location to be entered when a line is selected and the Select button is clicked.

Click Cancel at any time on the Divide Group screen to abort.

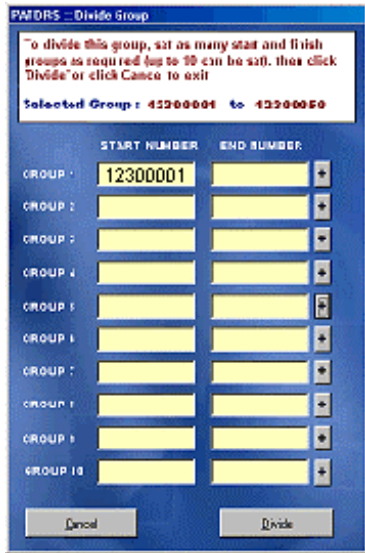
The screen below shows the groups created once the divide function has been used. It has divided the original group from **12300001 to 12300050** into five sub-groups as shown in the list below :

Combine With Group Above Function :: Worked Example

The combine group function allows two consecutive groups to be merged together, as long as they have not been used in a report by setting the address / location information. The 'Combine With Group Above' button is only available when the combine action is permitted – the following conditions do not allow the combine function to be used :

- Group above is used in a report (Address / Location is set)
- Group above is for a different PAT (when >1 PAT is downloaded on this PC)

In order to create the 5 reports as recorded on the worksheet, it is necessary to use the 'Divide Group' button.




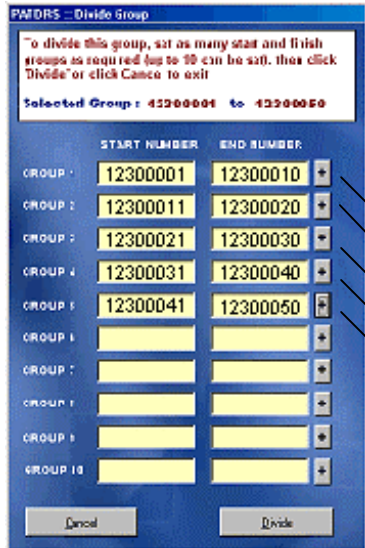
On pressing the Divide Group button, the screen shown left is displayed.

This shows the available range of tests at the top of the screen and allows up to 10 'sub-groups' to be created from the original start and end numbers.

To create the 'sub-groups' use the **+** button to set the end number as required.

This is repeated for each of the groups required.

 The Start and End numbers can be typed in using the keyboard if required.




The screen shot left shows the sub-groups defined to match the worksheet show previously.

Once this screen is set as required, click on the Divide button to apply these settings and divide the original group into the five separate groups.

COMPANY DETAILS	LOCATION	START NUMBER	END NUMBER	DATE OF TEST
ALPHAL OFFICE SUDBURY	ALPHAL OFFICE	123 0000 1	123 00010	15 / 8 / 05
BANK SITE HAWKSWORTH	HAWKSWORTH	123 000 11	123 00020	15 / 8 / 05
CHANDLER A.P. GARDENHAY	TRAY REPORT	123 000 21	123 00030	15 / 8 / 05
TRAYTE ACCOUNTS	ALPHAL SITE	123 000 41	12300040	15 / 8 / 05
ALPHAL ACCOUNTS SUDBURY	ALPHAL SITE	12300041	12300050	15 / 8 / 05

Combining a group

If two groups are displayed which need to be combined into a single group, simply highlight the group below the group it needs to be combined with and click the Combine with Group Above button. The list will be updated to display the new groups

 By using the divide and combine functions, the list can be modified to match the required report groups.

Deleting groups / reports

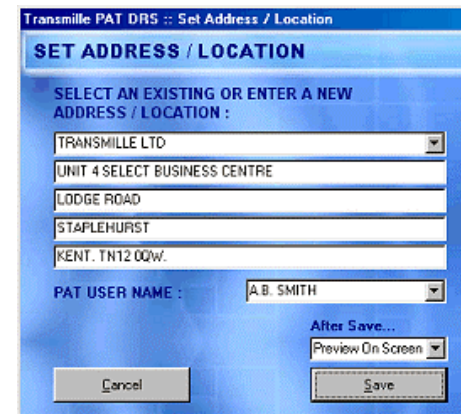
The delete function provides two functions, depending on the type of line selected.

If an existing report is selected (a test group which has the address /location already set), the delete function will delete the report reference only, allow the test data to be released for use on another report. The group used by this report will then be displayed with a ? to indicate it is available for use in a new report.

If an test group is selected which does not have a address / location defined, the delete button will allow the user to delete these tests from the database completely. This is useful if any ad hoc tests have been carried out which are not required to be used in any reports.

Setting the Address / Location for a test group

Once the required groups are displayed in the list, select a line and click the Select button. The following screen will appear :



Enter / select the address (any address previously entered on a report will be available in the drop down list).

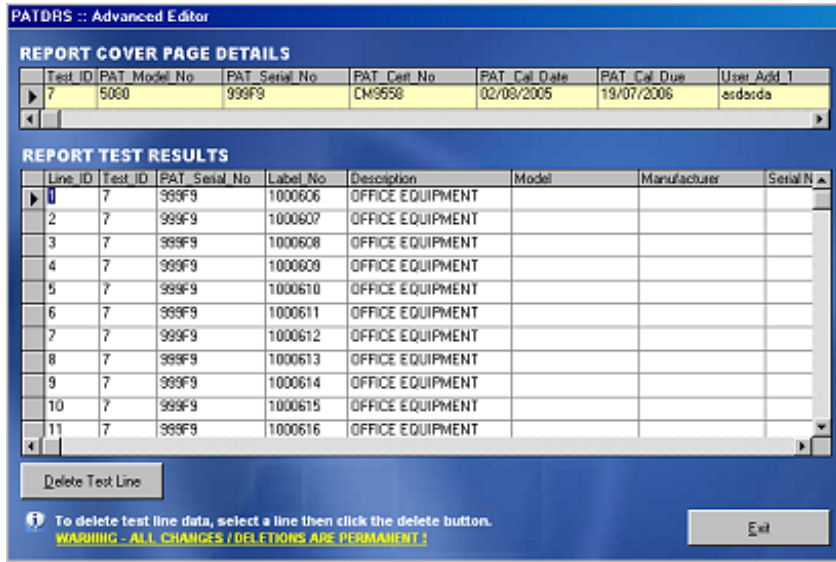
Select the PAT User Name from the drop down list.

To print or preview the report select the required option from the option list marked 'After Save...'

Click Save and the report will be saved (and printed / previewed as selected).

Editing Reports

For test groups which have an address / location defined, the report information can be edited by clicking on the Edit Report button :



The report cover page details can be edited using the top section of the screen. Test line data can be either modified or specific lines deleted by using the bottom section of the screen – before a test line is deleted a confirmation message is shown.



ALL CHANGES MADE ON THE ADVANCED EDITOR SCREEN ARE PERMANENT. THIS FUNCTION IS RECOMMENDED FOR EXPERIENCED USERS ONLY

Divide Group Function :: Worked Example

In this example, tests have been performed at each site and recorded on a separate worksheet (as shown below) :



The PAT download results in a single group of 50 tests as shown below :

