



Importing PAT4 Data and Creating New Asset Certificate

1. Select 'Download' from the menu, then select the PAT4 from the list and click 'Next'



2. Next Go to 'COMMS' on the PAT4 and select 'SEND'



3. Once the download is complete click 'Next', you will now need to choose whether you wish to create a contact from the PAT4 download file, (if you have already created your 'Contact' in the contact list choose 'No') then click Next.





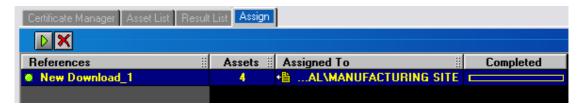
 Select the latest 'New Download' file (files are appended for the latest file e.g. New Download (2)) then click Next.



- 5. If you selected 'Create contact data from PAT4 file' in step 3 choose all 'Clients/Locations' from the list you wish to import. Click 'Next', now choose the 'Contact' you wish to assign the contact too.
- 6. You will now see the 'Format Wizard' again choose the latest download file from this list, this will either be given a date as a name e.g. D-2011-10-27 if multiple testing dates exist on your PAT4, or 'New Download' (perhaps appended, depending on the number of previous downloads). Click Next.



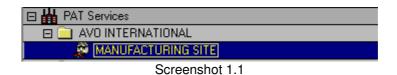
7. Your results will now be processed. Once complete the 'Assign' tab will automatically be displayed with a 'New Download' file listed (example below). You should also see an 'Assigned to' location at this point. If not or this path is incorrect; click and drag the yellow file icon and drag this to the appropriate location for the appropriate contact. (example seen below in screenshot 1.1)







How To Guide



- 8. Once you have the 'Assigned to' path assigned to the correct location as in step 7 press the green button. You will now see the 'Completed' progress bar turning yellow. Once completed this file will disappear and you will be presented with no data in the 'Assign' tab.
- 9. You will now need to click on and highlight the saved location in the contact list, in this example the

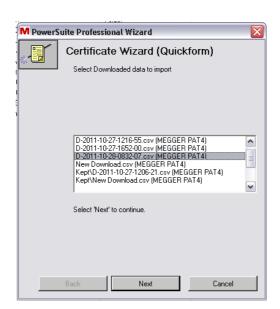
'MANUFACTURING SITE' for 'AVO INTERNATIONAL'. Then click the 'Certificate Wizard' button from your menu.

10. From the list of 'certificate types' click on 'Appliance Testing' and click 'Next'



- 11. Choose your desired certificate type from the list and click 'Next'
- 12. You will now need to select the appropriate .csv file from the list. You must choose the correct file as all results in this file will be added to the certificate (both old and new results). If multiple files exist the file you require should have a date as a name e.g. D-2011-10-27-1216-55.csv, select the correct dated file now (else choose the latest 'New Download' file. Then Click 'Next'





13. You can now divide your results by location, choose 'yes or no' depending on your preference, and then click 'Next'.



- 14. Now select the 'locations' you wish to add to the certificate. Hold CTRL key down to select multiple locations. Then click next.
- 15. You can next give your unique identification number, e.g. if this is the second year of testing the same assets you could type '2', and then click Next.
- 16. Next Enter a name for your certificate (in this example '2011 AVO International') and then click Finish.





Megger.

