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1. What is PAT Testing?

PAT Testing refers to Portable Appliance Testing. It's a process in the United Kingdom, Ireland, New Zealand and Australia whereby electrical appliances are routinely checked for safety. Regulations require that electrical appliances are regularly maintained to prevent harm to workers. For additional information on PAT Testing you may like to continue reading on Wikipedia; <u>https://en.wikipedia.org/wiki/Portable_appliance_testing</u>.

2. How do I enable PAT in RentalPoint?

PAT Testing is enabled via Barcoding #14 P.A.T. Setup.

2.1 No Integration

This option allows you to manually track and update PAT products. It does not integrate with any 3rd party applications.

- Launch RentalPoint and navigate to Setup Parameters Barcoding #14 PAT Setup.
- Ensure **PAT Enabled** is checked.
- Set the Import Type to **No Import**.

P.A.T. (Portable Appliance Testing)	
P.A.T. Enabled	
Availability. Checkout and Return Product De	efaults Packages to Import From
Import Type	
No Import	
Import from Safety 1st+ for Windows	
Import from QCC	
Import from Both	
Import Settings for Safety First	
Select Safety 1st+ Data Folder	
Test Connection Note: Visual Fox Pro Di	rivers must be installed on each
workstationmorder to	Import nom Salety 1st+
Import Settings for OCC	
Database	
	Test Connection
	Test Connection
Server	
	<u>I</u> <u>C</u> lose



2.2 Safety First (SF) Integration

First, you'll need to configure a connection to your Safety First database via a Visual Foxpro Connection.

- Download and install the latest Visual Foxpro drivers.
- Navigate to Control Panel Administrative Tools Data Sources (ODBC).
- Create either a User DSN or System DSN connection.

Next, you'll need to configure your Safety First database in RentalPoint.

- Launch RentalPoint and navigate to Setup Parameters Barcoding #14 PAT Setup.
- Ensure **PAT Enabled** is checked.
- Set the Import Type to Import from Safety 1st+ for Windows.
- Navigate to your PAT data folder.
- Click Test Connection to verify that your Visual Foxpro connection is successful.

RP P.A.T. (Portable Appliance Testing)	x
▼ P.A.T. Enabled	
Availability, Checkout and Return Product Defaults Packages to Import From	
Import Type	
No Import	
Import from Safety 1st+ for Windows	
Import from QCC	
Import from Both	
Import Settings for Safety First	
Select Safety 1st+ Data Folder	
K/\SafetyFirst	
Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+	
Import Settings for QCC	٦.
Database	
Test Connection	
Server	



2.3 QC-Check (QCC) Integration

- Launch RentalPoint and navigate to Setup Parameters Barcoding #14 PAT Setup.
- Ensure **PAT Enabled** is checked.
- Set the Import Type to Import from QCC.
- Enter your QCC database name and server name.
- Click Test Connection to verify that your connection is successful.

✓ P.A.T. Enabled Availability, Checkout and Return Product Defaults Packages to Import From Import Type No Import Import from Safety 1st+ for Windows Import from QCC Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Import from Safety 1st+ Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	P.A.T. (Portable Appliance Testing)	
PA.T. Enabled Availability, Checkout and Return Product Defaults Packages to Import From Import Type No Import Import from Safety 1st+ for Windows Import from QCC Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Server DEVSERV-Cheryl\SERVER		
Availability, Checkout and Return Product Defaults Packages to Import From Import Type No Import Import from Safety 1st+ for Windows Import from QCC Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Server DEVSERV-Cheryl\SERVER	✓ P.A.T. Enabled	
Import Type No Import Import from Safety 1st+ for Windows Import from QCC Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-CheryltySERVER	Availability, Checkout and Return Product Defau	Its Packages to Import From
 No Import Import from Safety 1st+ for Windows Import from QCC Import from Bath Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER 	Import Type	
 Import from Safety 1st+ for Windows Import from QCC Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER 	💿 No Import	
Import from QCC Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	Import from Safety 1st+ for Windows	
Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	Import from OCC	
Import from Both Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER		
Import Settings for Safety First Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	Import from Both	
Select Safety 1st+ Data Folder Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER Close	Import Settings for Safety First	
Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	Select Safety 1st+ Data Folder	
Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+ Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER		
Import Settings for QCC Database QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	Test Connection Note: Visual Fox Pro order to import from	Drivers must be installed on each workstation in Safety 1st+
Database QC_Check Server DEVSERV-Cheryl\SERVER	Import Settings for QCC	
QC_Check Test Connection Server DEVSERV-Cheryl\SERVER	Database	
Server DEVSERV-Cheryl\SERVER	QC_Check	Test Connection
Server DEVSERV-Cheryl\SERVER		
	Server	
<u>L</u> ose	Devsekv-cherynjsekverg	
Close		
L Close		
		<u> </u>

If your QC Check and RentalPoint Databases are hosted on different SQL Servers, you'll need to link them. See Appendix i for more details.



2.4 Both SF and QCC Integration

This option allows you to import from both SF and QCC. When importing test results RentalPoint determines which test result is the most recent and saves that test result to the RentalPoint product.

- Launch RentalPoint and navigate to Setup Parameters Barcoding #14 PAT Setup.
- Ensure **PAT Enabled** is checked.
- Set the Import Type to **Import from Both**.
- Follow the steps in 2.2 Safety First (SF) Integration to configure Safety First.
- Follow the steps in 2.3 QC-Check (QCC) Integration to configure QC-Check.

R ^P P.A.T. (Portable Appliance Testing)
Availability, Checkout and Return Product Defaults Packages to Import From
Import Type
🔘 No Import
Import from Safety 1st+ for Windows
Import from QCC
Import from Both
Import Settings for Safety First
Select Safety 1st+ Data Folder
K:\SafetyFirst
Test Connection Note: Visual Fox Pro Drivers must be installed on each workstation in order to import from Safety 1st+
Import Settings for QCC
Database
QC_Check Test Connection
Server
DEVSERV-Cheryl\SERVER

If your QC Check and RentalPoint Databases are hosted on different SQL Servers, you'll need to link them. See Appendix i for more details.



2.5 Additional Options

The PAT functionality has additional options that may apply to your company:

P.A.T. (Portable Appliance Testin	g)		•
🔽 P.A.T. Enabled			
Availability, Checkout and Retu	m Product Defaults	Packages to Import From	
🔲 Assets Unavailable Until Test	ed		
When enabled, maintenan	e records are entere	d for each test upon return	
Access Con Do Charles I Out 1	Without Testing		
Assets Can Be Checked Out	annoar resing		
Assets Can Be Checked Out	annout resting		
P.A.T. (Portable Appliance Testing))		<u></u>
P.A.T. (Portable Appliance Testing))		€
Assets Can be Checked Out P.A.T. (Portable Appliance Testing P.A.T. Enabled Availability, Checkout and Retur	n Product Defaults	Packages to Import From]
Assets Can Be Checked Out P.A.T. (Portable Appliance Testing P.A.T. Enabled Availability, Checkout and Retur	n Product Defaults	Packages to Import From	
Assets Can be Checked Out P.A.T. (Portable Appliance Testing P.A.T. Enabled Availability, Checkout and Retur Default PAT Testing to 'ON' f	n Product Defaults pr New Products Products	Packages to Import From	
 Assets Can be Checked Out P.A.T. (Portable Appliance Testing P.A.T. Enabled Availability, Checkout and Return Default PAT Testing to 'ON' f Default Import Option on New Safety First 	n Product Defaults or New Products Products	Packages to Import From	
 Assets Can Be Checked Out P.A.T. (Portable Appliance Testiny P.A.T. Enabled Availability, Checkout and Return Default PAT Testing to 'ON' f Default Import Option on New Safety First QCC 	n Product Defaults pr New Products Products	Packages to Import From	

2.6 PAT Terminology

To change the terminology used for PAT Testing go to Setup – Parameters – Terminology – Reports.

P Terminology					
General Reports Address Freight	Custom Templates	Cross Rentals	Phones	Crew	
Booking Hardcopy Title	Booking Hardcopy	•			
Asset Test History Report	P.A.T. Test History	T]<		
Event Management Fee Title	Event Management	-			



3. How do I configure PAT for the first time?

3.1 Importing Products

When importing rental products, the **Import Test Results From** field indicates where you would like to update the test results from. You can set this on a product by product basis.

- 0 Don't Import
- 1 Safety First
- 2 QCC
- 3 Both

mport Fields		RentalPoint Fields	Matching Fields	
Unit Height Unit Width Unit Length Print Notes on Custom Documents Print Notes on Invoices Print Notes on Delivery Sheets Questions To Ask Group Description Category Description	*	Category Description		Category Description
		Expand When Added to a Booking		Expand When Added to a Booking
Expand When Added to a Booking Nuto Checkout this Item	Е	Auto Checkout this Item		Auto Checkout this Item
mport Test Results From		Import Test Results From		Import Test Results From

You can use the import tool to update asset information. If you're updating the asset serial number

General	Picture	Rental Rates	Sales	Notes	Location	Attachments	
Product Product	: Informati t Code	on 					Printing Descriptions Printing Options Description for Client Facing Documents
Descrip Model I Color	ntion No.						
Qty Ow	ned	0.00		All Locatio	ns)		Product Options Transfer Options PAT Options Unit Specification Ø Assets Require Testing Asset to be tested on every return
Country Revenu	/ of Origir e Code						Un-tested assets affect product availability Import Test Results from: © Don't Import Test Results Safety First
Default Non-tra	Accessor	y Discount					Salety First QCC Most Recent (either Safety First or QCC)



3.2 Importing Assets

When importing assets there are several fields to enter PAT information;

P Import Assets									
😚 Load Data	🛃 Validate 🛛 🔒 I	Export Record	ls						
Vendor Code	Bin Location	Cost Price	Model No.	Insurer	Warehouse Location	Last Test Date 🔻	Test Status	Test Freq. (Days)	
						Bin Location		A	
Vendor Code	Bin Location	Cost Price	Model No.	Insurer	Warehouse Location	Cost Price Model No		Test Freq. (Days)	
						Insurer	_		
						Warehouse Locat	ion		
						Last Test Date		=	
						Test Status			
						Test Freq. (Days)		·	

3.3 Rental Product Properties

Each rental product has a PAT Options tab. Tick the **Assets Require Testing** to activate PAT for the product.

Product Options	Transfer Options	PAT Options	Unit Specifications	
🗹 Assets Require	Testing			
🔲 Asset to be test	ted on every return	I		
🔲 Un-tested asset	ts affect product av	ailability		
ျmport Test Resu	ults from:			
💿 Don't Import ⁻	Test Results			
🔘 Safety First				
🔘 QCC				
🔘 Most Recent (either Safety First d	or QCC)		
<u></u>				



3.4 Asset Properties

Once PAT is enabled on the product level, the assets within that product will have a PAT Testing tab. You can configure the asset details manually or click Update Test Results to pull the data from SF or QCC.

Euld Asset	
General S	ervice Information Financial Details Notes P.A.T. Testing
Last Test	t Date _/_/_
Next Tes	it Date _/_/_ Get Next Test Date
Status	Unknown
Last test	t results were imported from: Unknown
	Update Test Results

3.5 Treeview Options

Once PAT is activated for a product, the PAT status displays in the treeview for easy identification.



Right click utilities are also available to bulk update assets.





4. How do I use it in my everyday tasks?

4.1 Assets to be Tested Report

(i)

The **Assets to be Tested** report – located in the main Reports menu – prints a list of assets that require testing within the time period specified. This report is based on information in the RentalPoint database. If this is your first time running the report, you'll need to click 'Update Assets' to pull test results from Safety First or QCC.

'Update Assets' will only pull PASS results for assets tested in FULL test mode in QCC.

RP Print Assets to be Tested		X
From 11/23/2015 To	11/23/2015 Today	Options Printer Screen Word Processor CSV
 All Assets Group Category Product 	 All Select Location 0 - Main 	Operational Status All
		✓ OK × Cancel



4.2 Checkout Window

When an asset is scanned in the checkout window, the system determines if that asset needs to be tested either by searching for open maintenance records, or by checking the PAT status of the asset. Items that require testing are highlighted in yellow and added to a **To be tested** tab.

RP Checkout equipment, booking: FLYERS00002 from Location :0 - Main										_					- • •
Enter Barcoo	les Current Session	Equipment Out		Retu		ed		То	be tested		<				<u>la</u>
Equipment to be bar code scanned in this booking					Equ	Equipment checked out this session [nor bar code tracked]									
Product Code Description			Qty	Qty :	Pro	Product Code Description		ription		Qty	Checke	hecked Out			
ACER	ACER Aspire F5-571 15.6"	ZER Aspire F5-571 15.6" 1		1	1										
						-		F		đ		1 - 1			
Equipment ente	red / scanned this session		Mo	ve 🌂		Cross Rent 🖗 Nonbarcode 😫 🔹				V Select All					
Barcode	Description	Qty	T	ype	Cro	iss rent	ed ed	quipme	ipment checked out this session		session				
CABLES	Cables	1	S	ingle	Pro	Product Co		х-ке	ent Description		tion		Q	τy	Checked Out
COMP1	ACER Aspire F5-571 15.6	1	S	ingle											
	~														

To test the asset click **Import Tests** to pull the test data from SF or QCC. If a recent test is not available, you can click the **Tested** checkbox to manually test the asset.

RP Checkout equipme	Checkout equipment, booking: FLYERS00002 from Location :0 - Main										
Enter Barcodes	Current Session	Equipment Out	Out Returne		urned To be tested			<u></u>			
Barcode	Description	Last T	est Date	Next Test Date Status		Tested	Comments				
COMP1	ACER Aspire F5-571 15.6"				Re-Tes	it 🔲					
	Û ↓ Marport Tests Print										
Checkout Date	Checkout Time	Checkout Type	✓	Check	😂 Open			Save			
L			<u> </u>	Identify	Shortages	👌 Product	Setup	🗙 Cancel			

If the parameter **Assets can be checked out without testing** (Barcoding #14)is disabled, you are required to test all assets before saving the checkout. If you cannot test an asset you need to remove it from the session it in order to save the checkout.



4.3 Return and Open Return Windows

When an asset is scanned in the return or open return window, the system flags the asset for testing if **Assets Unavailable Until Tested** is enabled (Barcoding #14).

💀 Return Equipm	ent, Booking : Fl 🕊	ERS00002 to Location + 0 Main							- • •
Enter Barcodes	Current Session	Assets to be Tested (1)							
Equipment out a	and to be tracked	d with the bar code scanner		Equipment retur	ned - [ba	ar code scanned]			
Product Code	Barcode	Description	R	Barcode Descri		Description	Description		
ACER-1	COMP1	ACER Aspire F5-571 15.6"	Y	COMP1		ACER Aspire F5-571 15.6"			
				CABLES		Cables			
									-
				💁 Delete		🖹 Notes 🛛 🕻	🏂 Damaged		
				Equipment returned [not tracked with the bar code scanner, or cross rent					
				Product Code	X Rent	Descriptio	n	Out 🤇	Returned Qty
	, Г								
Errors and Warr	nings V		😫 Save Errors						
1 or more assets	s need to be test	ed.		L					
🗹 Auto save err	ors and display li	ist after return has closed					🗸 Select All	0	Unselect All

Items that require testing are highlighted in yellow and added to an **Assets to be Tested** tab. When the return session is saved, the system auto-creates maintenance records for each asset listed. The asset is removed from availability until it has been tested and the maintenance record has been resolved.

RP Return Equipment, Booking : FLYERS00002 to Location : 0 - Main										
Enter Barcodes Current Session Assets to be Tested (1)										
Barcode	Description	Last Test	Next Test	Re-Test	Remove From Availability	Test Date	Comments			
COMP1	ACER Aspire F5-571 15.6"	11/23/15	11/23/15	Required 🛛	11/23/15	11/23/15				



Appendix

- I. Linking QC and RentalPoint SQL Servers
 - The query against the QC database to update PAT results links back to the RentalPoint Database, so on the SQL Server that hosts the QC database, you'll need to link back to the RentalPoint SQL Server. See sample commands below where 'OtherServer\SQLEXPRESS' is the name of the RentalPoint SQL Server and instance

```
EXEC master.dbo.sp_addlinkedserver
    N'OtherServer\SQLEXPRESS',
    N'SQL Server';
GO
EXEC master.dbo.sp_addlinkedsrvlogin
    @rmtsrvname = N'OtherServer\SQLEXPRESS',
    @locallogin = NULL ,
    @useself = N'True' ;
GO
```

Full details at this link: <u>https://docs.microsoft.com/en-us/sql/relational-databases/linked-servers/create-linked-servers-sql-server-database-engine?view=sql-server-ver15</u>

 You'll also need to enable delegation from the linked servers via Active Directory to allow password pass-through for database access. Full details at this link: <u>https://blogs.technet.microsoft.com/askds/2008/06/13/understanding-kerberos-double-hop/</u>