BBSA®
BRITISH BLIND & SHUTTER ASSOCIATION

Training Guide

Fitting Module

This module covers the following:-

Health and Safety

Setting out

Commissioning / demonstrating the product

Cleaning up

Customer sign off

Waste management

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1.0 Health and Safety

Planning your work is essential to ensure a safe and successful installation.

When looking at any installation, the planning of work required is essential to ensure success.

Once the requirements of the installation are known, the first stage of the planning MUST be Health and Safety.

Below are a number of basic checks for the majority of installations. However, it is essential to seek further advice and make sure further reviews are carried out for each specific task and each individual location.

- Is the work to be carried out at ground level or is access equipment required? Access equipment covers hop-up and pod steps, ladders as well as scaffold towers for more complex jobs.
- Is the installer(s) competent and have they been trained to use the equipment correctly?
- Has the equipment been inspected and results recorded in compliance with the 'safe to use' requirements?
- Does the location / job require PPE or other equipment like barriers and are they in a suitable condition?
- Are the tools used by the trades person suitable for the task? Are power tools compliant with the Portable Appliance Testing (PAT) requirements?
- Has a risk assessment been carried out specifically for the task or has a standard risk assessment been adjusted for the project?
- Is a site specific method statement required?

Please remember if you choose to sub-contract the installation of your products to a third party who works for you / on your behalf, it is YOUR responsibility to ensure that they are competent to carry out the task and fully comply with Health and Safety requirements.

For further information refer to the BBSA Guidance Note A24 on using Sub-Contractors.

2.0 Setting Out

Before you even enter the client's premises, you need to ensure you have the necessary materials and equipment to complete the job and protect the client's property such as clean dust sheets and overshoes.

It is important these covers go into a property neatly folded and clean and come out with all the dust and small amounts of rubbish contained within them. It is essential they are properly cleaned before the next job.

All too often we see tradesmen's tools placed directly on the floor, window sills or furniture without protective covers. This not only leads to the possibility of damage to the client's property and a claim but also leaves a negative impression with the client.

Setting out includes ensuring the blinds are in the correct location and identifying the correct position of the brackets.

In this section we consider a number of different types of products and locations which also refer back to the Measuring Module:

- internal blinds inside the recess
- internal blinds outside the recess
- internal blinds for bay windows
- internal shaped blinds
- internal conservatory roof blinds
- internal shutters
- external awnings
- external canopies
- motorised products

NOTE

You must check the grounds you are drilling into to identify any hidden services such as pipes or cables. You must also check that asbestos is not present or likely to be present.

Before starting any of the installations ensure you have a copy of the order or plans / drawings at hand to ensure you have the correct product for the right location.

Also double-check the dimensions of the blind against the original order.

For blinds inside the recess double-check if the client requires the blind to be installed an equal distance from the front of the recess or an equal distance from the back of the recess. This should have been determined at the survey stage.

It is good practice to measure the depth of the recess at the top as many measurements across the width of the blind will record different dimensions.

In all cases ensure you follow instructions of the manufacturer.

3.0 Internal Blinds Inside the Recess

3.1 Roller blinds

Identify the position for the blind to be installed and confirm the correct measurements by either measuring or placing the blind in position. Most blinds with a plunger end can be held into position and with each end touching the wall finish, you will be safe to install the brackets tightly to each wall.

Check the order details for face fix, top fix or side (end) fix.

Fixing options:

Face fix:

- This could be fitted into wooden frame, PVC frame or to grounds above the window. (For PVC frames the fabric needs to go over the front of the roller to avoid hitting the handles when the blind is operated).
- Position the brackets in place and mark a minimum of two fixing points for each bracket. Use an appropriate drill bit and drill the frame. Use appropriate screws to secure the bracket into position at both ends.
- Please note for large width blinds typically larger fixings may be required.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

Top fix:

- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. Position the brackets in place and mark a minimum of two fixing points for each bracket. Use an appropriate drill bit and drill into the ceiling for plasterboard and metal lintels using an appropriate drill bit. For concrete lintels, re-drill with a masonry drill bit and use appropriate fixings suitable for the fixing material. (Also refer to the Fixings Module).
- With the brackets in place, locate the blind.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

TIP

Install the blind with the protective wrapping on and remove the wrapping when in place or wear clean gloves and remove the wrapping and then install the blind.

- If the window width is greater at the top than the bottom by a reasonable amount, this is usually due to tiles or an upstand at low level. When this occurs, it is important to ensure the blind will go between the tiles / upstand when the blind is at its lowest position.
- First check to see if the tiles / upstands are equally centralised. If not, the blind may have to be installed off centre.
- A spirit level can be used to mark out the edge of tile / upstand on the ceiling. The brackets can then be positioned with the knowledge that the blind will fit correctly (See Fig 1). Or you could position the blind across the tiles and measure how far in from the reveal the brackets should be fitted allowing for any variations in the recess size at the top of the window.

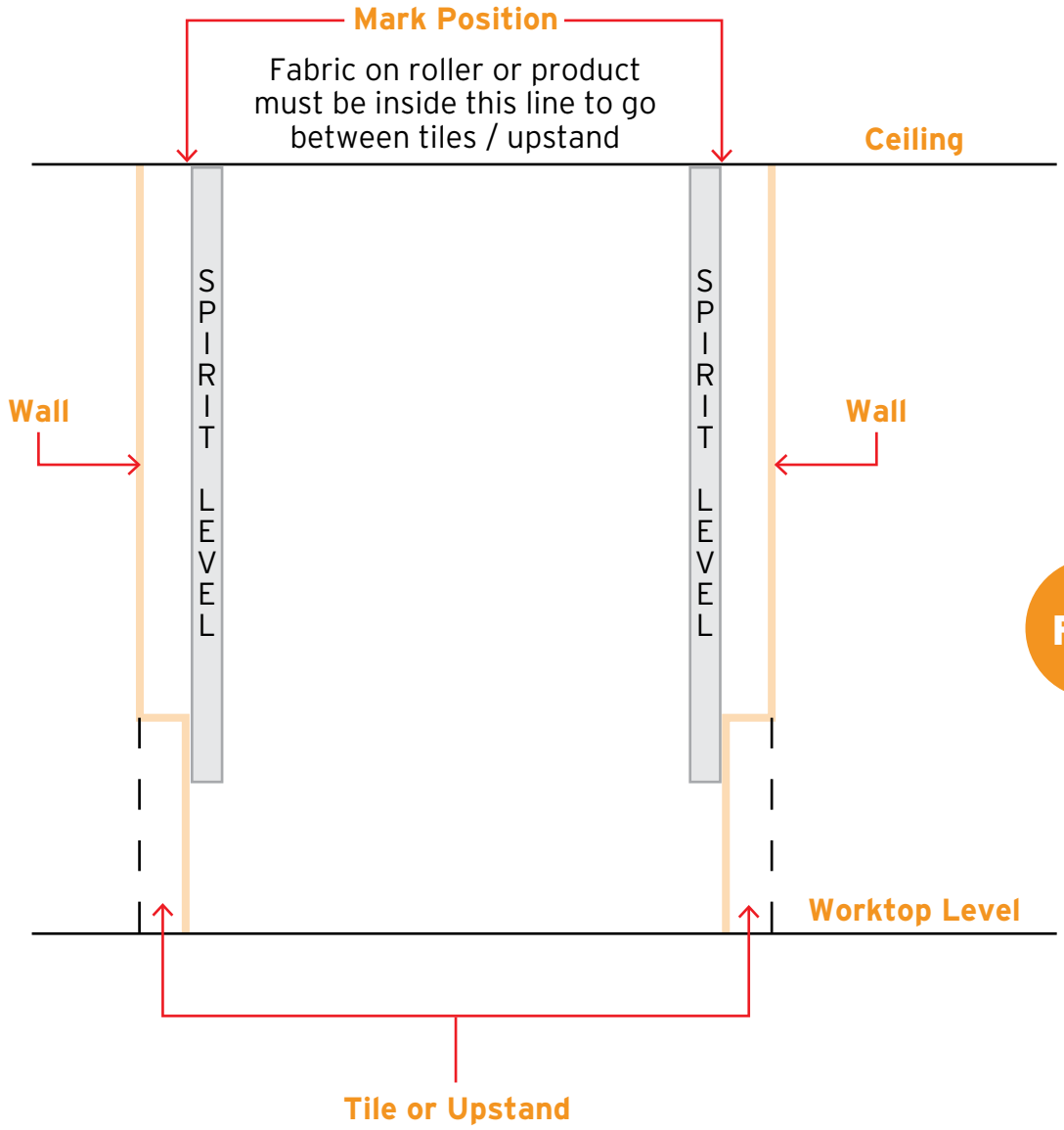


Fig 1

Side fix:

- A number of installers prefer to install blinds by drilling and fitting into the side wall or reveal. Typically this is easier to fix than drilling into lintel but both you and the product measurements have to be very accurate. It may be more difficult to ensure the product is level. Particular attention is required to check whether the wall is square / parallel and an allowance is required depending on the type of product. Usually the wall area nearer the window in a reveal is wider than the front width.
- In most cases you first establish which bracket should be installed first. This is usually based on the lowest point to ensure the other bracket has the flexibility to be moved up or down to level off. Depending on the grounds you are fitting to side fixing may be stronger than top fix and it can sometimes allow the blind to be fitted tighter to the soffit which is useful when fitting dim-out blinds.
- With the first bracket installed either a spirit level is used to mark the other bracket position or more likely today a laser level. The benefit of the laser level is that it is easier to carry out with a wider gap and is usually more accurate.
- Ensure the bracket at the other end is the same distance away from either the front of the reveal or from the window frame.
- Drilling is then usually carried out with a masonry drill into brick or block work or an appropriate drill bit into a timber / PVC construction using the appropriate screws and plugs for the application.

3.2 Fully Cassetted Roller Blind

- Identify the position of the blind to be installed and check the measurements either by measuring or placing the blind in position for the width and check the drop by placing the side channels in place. Some models also have a bottom channel.
- The fixing of the cassette blind inside a recess is usually 'top fix' but can be 'face fix'. Position the brackets ensuring adequate space between the blind and the vents / handles.
- Mark the fixing points for each bracket and drill into the ceiling.
- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.
- Use the appropriate fixings suitable for the fixing material (Also refer to the Fixings Module).
- Secure the head rail into the brackets. Locate the two side channels into the head rail and ensure they are square and parallel with each other (using a spirit level) - in some instances packing pieces will be required. To achieve this, mark the channel for suitable fixing points and drill the channel.
- Re-position the channel and mark the wall ensuring it is square and drill with a suitable drill bit. This can then be secured with a wall plug and screw for each location.
- At this stage it would be wise to operate the blind to ensure it runs up and down smoothly. Assuming it is working correctly, locate the bottom channel between the two side channels. Drill the bottom channel and then once back in position, use an appropriate drill bit to drill into the window sill using the appropriate fixings.
- Carry out a final test of the blind.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.
- Finally seal with caulk to provide a light seal, if required.

TIP

If the blind does not seem to be operating smoothly, check if it is square by comparing the diagonal dimensions are the same – top left of the blind to bottom right vs. top right to bottom left.

Decorator's caulk is denser than mastic and will reduce the amount of light coming through. Putting a bead of caulk or mastic on the side channel before fixing them to the wall can help seal the light.

3.3 Venetian Blind

- Identify the position of the blind to be installed.
- If the window width is greater at the top than the bottom by a reasonable amount, this is usually due to tiles or an upstand at low level. When this occurs, it is important to ensure the blind will go between the tiles / upstand when the blind is at its lowest position.
- Place the blind inside the recess and mark the position of the brackets. Generally Venetian blinds are top fix but can be face fix.
- Some wood Venetian blinds can be supplied with end box brackets with additional U shaped brackets- depending upon the width. Other wood blinds and aluminium Venetian blinds will generally be supplied with swivel brackets.
- Ensure the position of the blind. If positioned off the window frame, adequate space will be required between the blind and the window frame so that the window handles do not impede the blind as it is operated.

TIP

A general rule with a wooden frame window is that the handles do not protrude past the frame. On the other hand, with a PVC window frame the handles usually protrude 35mm and door handles protrude 55mm. Always check.

- When using swivel brackets, ensure they are positioned away from any operating components in the head rail but fit a bracket near to the stress points such as the pull and tilt controls.
- With the brackets positioned and marked with a minimum of two fixing points for each bracket, drill into the ceiling.
- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.
- Use the appropriate fixings suitable for the fixing material (Also refer to the Fixing Module).
- With the brackets in place, fit the blind.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

3.4 Vertical Blinds

- Identify the position of the blind to be installed.
- Place the blind track inside the recess and mark the position of the brackets as required. Generally vertical blinds are 'top fix' inside a recess but can be 'face fix'.
- Ensure the position of the brackets allow clearance of the fabric from window vents and handles when turning the vanes.
- With the brackets positioned and marked with a minimum of two fixing points for each bracket for face fix, or one fixing for top fix brackets and drill for fixings.
- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.
- Use the appropriate fixings suitable for the fixing material. (Also refer to the Fixing Module).
- With the brackets in place fit the blind track.
- We suggest clean gloves are worn when handling the fabric. Check the fabric is installed in the correct direction and clip on hangers. Then install the bottom weights and chains if required.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

3.5 Roman Blinds

- Identify the position of the blind to be installed.
- Place the blind inside the recess and mark the position of the brackets as required. Generally Roman blinds are 'top fix' inside a recess but can be 'face fix'.
- Ensure the position of the brackets allow clearance of the fabric from window vents and handles, particularly when in the retracted position. Remember the blind is likely to swing slightly when operated and some fabrics fold up differently and can "kick back" so make sure you allow for this when determining the position of the blind. With new requirements for breakaway connectors on the reverse of the blind make sure the headrail is fitted far enough forward to clear any handles.
- The bracket type used is usually the swivel type. Some suppliers offer a spring loaded clip bracket but these may require packers when the ceiling is not perfectly flat.
- With the brackets positioned and marked with two fixing points for each bracket drill into the ceiling.
- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.

- With the brackets in place fit the blind.
- This is best carried out by removing the fabric from the head rail, inserting the head rail and then re-attaching the fabric to the head rail Velcro strip. We suggest gloves are worn when handling the fabric.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

3.6 Insect Screens

- Insect screens are designed and installed in the same principle as a cassetted roller blind system (see 3.2) with fabric that comes down from the top. However, always follow the manufacturer's instructions.
- When an insect screen is only required to cover one opening of the window, there usually is a side fixing at one end and face fixing at the other - ensure you use the appropriate fixings.
- When the screen pulls from one side, it is essential the frame system is square. For other details following the manufacturer's instructions.
- You will usually have a requirement to install mastic to cover any gaps due to the wall not being square although some systems allow for this in their design and have some adjustment in the side channels.

4.0 Internal Blinds Outside the Recess

4.1 Roller blinds

- The order details should state if 'face fix' or 'top fix'.
- Identify the position of the blind to be installed and check the measurements by either measuring or placing the blind in position.
- Identify the width of the fabric and centralise this in relation to the position of the blind. The majority of times this will mean to align with the edges of windowsill or an equal amount either side of the window or door.
- Once the position is identified, use a spirit level to mark the edge of the fabric position and locate the blind in its place by positioning the bracket. The bracket can then be marked at the correct height and fixed into position using the appropriate fixings. Place the blind into position and mark the other bracket the opposite end. Check with a spirit level that the brackets are level.
- Please note that generally for large width blinds larger fixings may be required.
- If you are not aware of the wall finish and construction, we suggest using a small diameter drill bit first and then a larger masonry drill bit if required.
- Use the appropriate fixings suitable for the fixing material (Also refer to the Fixing Module).
- With the brackets in place locate the blind.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

TIP

Install the blind with the protective wrapping on and remove the wrapping when in place. Alternatively wear clean gloves, remove the wrapping and then install the blind.

4.2 Fully Cassetted Roller Blind

Identify the position of the blind to be installed and check the sizes are correct by either measuring or placing the blind in position for the width and check the drop by placing the side channels in place. Some models also have a bottom channel.

- The fixing of the cassette blind outside a recess is usually 'face fix' but can be 'top fix'.
- Ensure you have clearance from handles, particularly for doors.

- If the window opens inwards, ensure the blind is fitted with sufficient clearance above the recess so it does not impede the travel of the window opening.
- Identify the width of the fabric and centralise this in relation to the position of the blind required. The majority of times this will mean to align with the edges of window sills or be an equal amount either side of an opening.
- Once the position is identified, use a spirit level to mark the edge of the fabric position and locate the blind in its place by positioning the brackets along the width of the blind. The bracket can then be marked at the correct height and fixed into position using the appropriate fixings. Check with a spirit level that the brackets are level.
- If you are not aware of the wall finish and construction, we suggest using a small diameter drill bit first and then a use a larger masonry drill bit if required.
- Use the appropriate fixings suitable for the fixing material (Also refer to the Fixing Module).
- With the brackets in place locate the blind cassette header. Place the two side channels in place and once square and parallel, mark the fixing positions and secure.
- At this stage it would be wise to operate the blind to ensure it runs up and down smoothly.
- For some installations of this type a bottom channel is also required and can be fitted once the side channels have been installed.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.
- Finally seal with caulk to provide a light seal, if required.

TIP

Decorator's caulk is denser than mastic and will reduce the amount of light coming through. Putting a bead of caulk or mastic on the side channel before fixing them to the wall can help seal the light.

If the blind does not seem to be operating smoothly, you can check if the blind is square by comparing the diagonal dimensions are the same – top left of the blind to bottom right vs. top right to bottom left.

4.3 Venetian Blind

- Identify the position of the blind to be installed.
- If the window width is greater at the top than the bottom by a reasonable amount, this is usually due to tiles or an upstand at low level. When this occurs, it is important to ensure the blind will go between the tiles / upstand when the blind is at its lowest position.
- First check to see if the tiles / upstands are equally centralised otherwise the blind may have to be installed off centre.
- A spirit level can be used to mark out the edge of tile / upstand on the ceiling. The brackets can then be positioned with the knowledge the blind will fit correctly (See Fig 1).
- Place the blind inside the recess and mark the position of the brackets. Generally Venetian blinds are 'top fix' but can be 'face fix'.
- Some wood Venetian blinds can be supplied with end box brackets with additional U-shaped brackets depending upon the width. Other wood blinds and aluminium Venetian blinds will generally be supplied with swivel brackets.
- Ensure the position of the blind. If positioned off the window frame, it will require adequate space between the blind and the window frame so that the blind does not hit the handles when being operated.

TIP

A general rule with a wooden frame window is that the handles do not protrude past the frame. On the other hand, with a PVC window frame the handles usually protrude 35mm and door handles protrude 55mm. Always check.

- When using swivel brackets, ensure they are positioned away from any operating components in the head rail but fit a bracket near to the stress points such as the pull and tilt controls.
- With the brackets positioned and marked with a minimum of two fixing points for each bracket, drill into the grounds.
- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.
- Use the appropriate fixings suitable for the fixing material (Also refer to the Fixings Module).
- With the brackets in place fix the blind.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

4.4 Vertical Blind

- Identify the position of the blind to be installed.
- Place the blind track inside the recess and mark the position of the brackets as required. Generally vertical blinds are 'top fix' inside a recess but can be 'face fix'.
- Ensure the position of the brackets allow clearance of the fabric from window vents and handles when turning the vanes.
- With the brackets positioned and marked with a minimum of two fixing points for each bracket 'face fix' or one fixing point for 'top fix' brackets. Then drill into the grounds.
- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.
- Use the appropriate fixings suitable for the fixing material. (Also refer to the Fixings Module).
- With the brackets in place, fix the blind track.
- We suggest clean gloves are worn when handling the fabric. Check the fabric is installed in the correct direction and clip on hangers. Then install the bottom weights and chains if required.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

TIP

For suspended ceilings, depending on the overall weight of the blind it may be possible to use a special ceiling tile bracket provided by some suppliers.

4.5 Roman Blinds

- Identify the position of the blind to be installed.
- Place the blind inside the recess and mark the position of the brackets as required. Generally Roman blinds are 'top fix' inside a recess but can be 'face fix'.
- Ensure the position of the brackets allow clearance of the fabric from window vents and handles, particularly when in the retracted position.
- The bracket type used is usually the swivel type.
- With the brackets positioned and marked with two fixing points for each bracket, drill into the grounds.

- You may be fixing to plasterboard, masonry, a metal lintel or a concrete lintel. For concrete lintels, re-drill with a suitable masonry drill bit.
- Use the appropriate fixings suitable for the fixing material. (Also refer to the Fixings Module).
- With the brackets in place fix the blind.
- This is best carried out by removing the fabric from the head rail, inserting the head rail and then re-attaching the fabric to the head rail Velcro strip. We suggest gloves are worn when handling the fabric.
- IMPORTANT: If the blind requires a device to comply with the Child Safety requirements BS EN 13120, the product MUST be installed accordingly.

4.6 Insect Screens

- Insect screens are designed and installed in the same principle as a cassetted roller blind system with fabric that comes down from the top (see 4.2). However, always follow the manufacturer's instructions.
- When the screen pulls from one side, it is essential the frame system is square. For further details follow the manufacturer's instructions.
- You will usually be required to install mastic to cover any gaps due to the wall not being square although some systems allow for this in their design and have some adjustment in the side channels.

5.0 Internal Blinds for Bay Windows

With a number of different bay shapes and designs, it is crucial to look at the measurements and other documentation in order to plan and agree their position with the client prior to installing.

TIP

Fitting the blinds to a batten or using a back plate will help with installing at the sides of the bay as, particularly with a roller blind, the fixing position can be at the extreme edge of the plasterboard.

5.1 Rectangle Bay

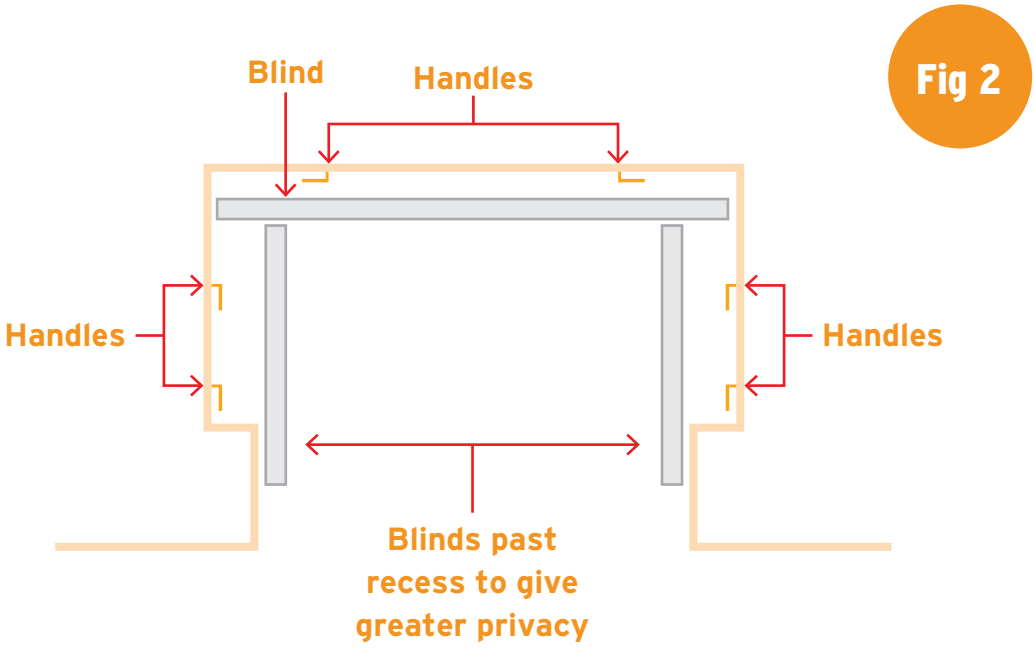
Typically with a rectangle bay having two sides the front blind should go the complete width. The two side blinds need to allow for correct operation, but their gap from the front blind should be reduced to a minimum.

Ensure the front blind is positioned so it will not snag the handles or window vents when operated. Installing each blind type is the same as described in the previous sections whether inside the recess or outside the recess.

In some situations the bay area requiring blinds only has a small recess and with a PVC window frame the handles can come out as far as or further out than the recess. In these situations hopefully this has been discussed with the client at the measuring stage. However, generally for wood Venetian and Roman blinds they can go past the recess and if there is enough wall space beyond the window so the level of dim-out or privacy is greater than stopping in line with the edge of the PVC frame (see Fig 2).

The installation of any child safety devices should have been discussed with the client at the point of survey. However, when installing the blinds and devices, it might be prudent to discuss this with the client again. Any front blind requiring a suitable child safety device will require a fixing into the frame in most cases. The client may then request the same for the two side blinds or to have them fixed into the main wall structure.

When installing Roman blinds in a bay area with a reasonably long drop ensure the blind is positioned far enough forward so when the fabric is retracted behind the face point, the fabric or cords do not get caught on the window or door handles. Measure the bulk of the fabric depth before marking for a fixing position.



5.2 Curved Bay

- The same process can be used for installing certain types of blinds in shaped conservatories.
- Follow the same process for installation as detailed in the Measuring Module. The details of the measuring survey should be with the order / installation notes.
- A roller blind or a wood Venetian blind with end box brackets are the most difficult ones to fit as they have end fixings that require a very precise installation. Other blind types allow a movement of the head rail on the fixing clips for slight adjustments.
- The installation of any child safety devices should have been discussed with the client at the point of survey. However, when installing the blinds and devices it might be prudent to discuss this with the client. Any front blind requiring a suitable child safety device will require a fixing into the frame in most cases. The client may then request the same for the two side blinds or to have them fixed into the main wall structure.
- When installing Roman blinds in a bay area with a reasonably long drop ensure the blind is positioned far enough forward so when the fabric is retracted behind the face point, the fabric or cords do not get caught on the window or door handles. Measure the depth of the fabric stack before marking for the fixing position.

5.3 Roller and Wood Venetian Blind Installation

- It is usually best to start with the centre blind and mark the position of the brackets. It is recommended to mark out the position of all the other bracket positions to ensure all blinds fit correctly prior to drilling. After the first blind is installed, re-check the previous positions marked to ensure they are still in the correct positions prior to drilling.
- Fitting of blinds should be carried out in the same way as detailed in the instructions for either inside recess or outside recess.
- In a number of situations you will be installing the blinds on the outside of the recess in bay areas. The key here prior to drilling any fixing holes is to ensure the client understands how the blinds will hang and what the gaps between the blinds will be like. This should have been fully discussed and agreed at the survey stage. This is particularly relevant when installing in bedrooms as light will penetrate in and also at the front of the property where others will be able to see into the house through the gaps. If discussed prior to fitting, it may be possible to slightly adjust the fixing position.
- Sometimes it may be a case of holding up a tape measure or any straight line in that position to demonstrate the gap.

TIP

When marking the brackets' fixing positions, place brackets back-to-back to ensure you have the correct location as identified in the drawing within the Measuring Module.

You must state whether your measurements are "as viewed" – (looking up to the conservatory roof) or "plan view" – (looking down on the blinds from above the conservatory). Sometimes with complex conservatory roofs drawing the blinds can be confusing but if you are working to "as viewed", you can hold your drawing above you head to check what you have drawn matches the actual blind shape you are measuring.

6.0 Internal Shaped Blinds

- Installing shaped blinds is no different to installing a standard product but you will need to take greater care with marking out.
- The art of the correct installation of a shaped product is in the measuring and possibly taking a template when required, as outlined in the Measuring Module.
- Prior to installation check the detailed measuring notes to ensure the position of the blind is correct. Once confirmed locate brackets and secure as described in the sections detailed above for inside recess and outside recess.
- It is essential the blind is square, parallel and level before marking for the bracket fixings.

TIP

Ensure the client is aware of the limited amount of pressure that can be applied to the control mechanisms and also that some blinds cannot be retracted due to their shape.

7.0 Internal Conservatory Roof Blinds

Installation of blinds in a conservatory fall into two main areas:

7.1 Window (side) Blinds

- Generally the installation around the perimeter is similar to installation to a standard window in the property. The main points for fixing should have been identified during the survey stage and need to be confirmed prior to drilling.
- If the conservatory is installed against a single storey building, usually a box section containing a gutter would have been installed between the building and the conservatory. Avoid fixing into this as a top fix as you may penetrate the gutter. Secondly if installing blinds around the perimeter at a position above the top windows (in most cases) ensure the bottom of the gutter section is not lower than the position you have selected to install the blinds.
- Above the window section there is typically a clip on PVC capping and behind this is an aluminium extrusion to support the roof structure and weight. The PVC wall is not sufficiently thick enough to support blinds so you must drill into the aluminium and secure the blind. Self-tapping screws or self-drilling screws are recommended for this type of installation (see Fixings Module).
- Drilling into the main PVC is suitable to take the weight of the blinds and provides a secure fixing. It is recommended to pilot drill before using a self-tapping screw.
- Installing a tensioned pleated blind usually requires drilling into the beading. Ensure the drill is at the correct angle and only a suitable depth is taken with the drill and screw to prevent damage to the glass seal or glass itself.
- The risk associated with drilling has generally been removed from the industry with the introduction of clip in products. If installing this type of product, follow the manufacturer's fitting instructions. When installating on cold days, NEVER be tempted to lift the gasket with a screwdriver to slide the clip under. This could cause the glass to crack.

7.2 Roof Blinds

- The three most common types of roof blinds are pleated, wood weave also known as Pinoluem and roller blinds. These can be operated either manually by an operating rod (or cord for roller blinds) or by electric motors. In addition, fabric sails are also used to create a decorative or 3D feel.
- It is essential that the blind's brackets are securely fixed as the blinds generally remain under some tension.
- The base brackets are secured above the top window section into the frame structure. This has a clip-on PVC capping and behind there is an aluminium extrusion to support the roof structure

and weight. The PVC wall is not sufficiently thick enough to support blinds so you must drill into the aluminium to secure the blind.

- Securing the top of the blind usually depends on the location and the position of the roof.
- Fixing at the centre of the apex is usually difficult due to all the different structures and profiles found in a conservatory. To overcome this, install an L-section of white powder coated aluminium. Secure the aluminium to the conservatory spars and the brackets to the L-section. Fixing the brackets can also be carried out at ground level once correctly positioned.
- Fixing brackets for a shaped blind that does not go to the apex can be carried out by fixing the brackets directly to the PVC frame, using the L-section profile or flat profiles to mount the brackets. It is essential these brackets are parallel to the base.
- For shaped blinds the additional tension wires also need securing. With the blind in position and the other support cords tensioned, these tension wires can be positioned and marked on the spar for drilling. Ideally these points are screwed into the PVC and also through into the aluminium.

TIP

To allow greater control of the drill and ease of access, an angled drill is best for this part of the installation.

- Areas like roof vents usually have two separate blinds or one blind operating from each end. If there are two blinds, it is best to install masking tape at the blind fixing position either side of the roof operating rod or electric mechanism and then operate the roof to ensure clearance. This should also have been carried out during the detailed measure and possibly measuring marks left on the conservatory.
- With all the blinds installed the tension can be adjusted so all the fabric is at the same level.
- Some conservatories have separate corner sections clipped in. These would have been removed to install the blinds. With the blinds installed you can measure the depth of the blind down from the top and cut this top section off. Re-installing is usually best by glue first, then a mastic around to provide a neat finish.

TIP

When fitting blinds in a P-shaped conservatory you MUST NOT fix to the diagonal support as shown in the picture. This is usually a single skin and acts as a gutter.

P-shaped conservatory showing gutter section

Blinds fitted tight to the centre crown / rose.

Typical roof opening with a blind either side.

8.0 Internal Shutters

- In essence the installation should be the same as for blinds detailed in the previous sections concerning inside recess and outside recess.
- Due to the many different methods of installation specified by the different manufacturers, you must obtain details from your supplier.
- Many suppliers offer training on how to install their shutter products to provide you with guidance for a successful installation.

9.0 External Awnings

- It is essential to have the survey document and order details that clearly identify the location in which the awning is to be installed prior to visiting site.
- The documents should also clearly advise what type of access equipment is required and if barriers will be required (usually for shop or commercial installations).
- A risk assessment should be carried out when on site.
- Depending upon the awning size, the installation and the actual carrying of the awning will involve a number of people. Don't forget specialist equipment to lift the awning is available and may prove suitable in most applications.
- With the location identified for the awning to be installed, the brackets need to be positioned.
- Ensure you follow the manufacturer's requirements providing the exact locations for positioning the awning brackets. These have been designed in the required positions to ensure compliance with all the testing and approval requirements of the awning.
- Some awnings will have end fixings only while others might have a number of brackets throughout the width of the awning.
- The order and site conditions will dictate if the awning is to be installed directly to the wall surface or by using specially designed brackets.
- With the position of the bracket in place, drill the appropriate sized hole based on the type of fixing used and the grounds you are fitting to. Please see the Fixings Module for suitable fixing types and how to install. If there is any concern regarding the security of the awning fixing, you should not install the awning but seek further advice.
- Once the far left bracket is secured, position. Then repeat for the far right bracket. Then use a string line or level and install all other brackets after ensuring all is square and level.
- If special brackets are used to gain additional height on single storey buildings or to come in front of obstructions, we suggest one bolt is used to secure the bracket and then level off with the second bracket, and so on, with one bolt fixing. When all the brackets are in position and all level, you can then proceed to secure the brackets with the other fixing points.
- With the brackets secured the awning can be lifted into position. This may be either a manual or a machine assisted process.
- The awning can then be secured into position and checked for a level. The pitch can then be adjusted.
- Installation of wind sensors and vibration sensors must be fitted in line with the manufacturer's instructions and with the appropriate fixings.

TIP

When using special brackets, check for a level and start at the point which allows other brackets to come down to achieve the same level.

10.0 External Canopies

It is essential to have the survey document and order details that clearly identify the location in which the canopy is to be installed prior to visiting site.

The documents should also clearly advise what type of access equipment is required and if barriers are required (usually for shop or commercial installations).

A risk assessment should be carried out when on site.

With the location identified, the product shall be checked for size and measurements taken for the bracket positions. On the assumption there are no issues with fixing positions, locate the first bracket and secure it with the appropriate fixing. Measure for the next bracket, and with a spirit level positioned at the bottom of the bracket level secure the second bracket. This process can be continued until all brackets are in position.

- Ensure you use the correct access equipment, personnel and methods to position the canopy in place.
- Fix both legs of the canopy to solid grounds using appropriate fixings. If there is any concern regarding the security of the canopy fixing you should not install the canopy but seek further advice.
- For a retractable canopy, the cords must be in place otherwise the canopy cannot be corded. Then install a cleat on the wall ensuring it is out of reach of children.
- For a fixed canopy, the aluminium bars should be supplied and marked up in the correct sequence, both left to right or right to left but also with the top labelled. These are usually riveted into place.
- For most installations screws should be installed from within the canopy through the fixing bracket and into the frame.

TIP

The first and last bracket is usually positioned around 150mm from each end but also between the end of the canopy and the 45 degree support. (Supporting the top and side extrusion).

There are a number of different canopy designs so always follow the instructions provided by your supplier.

11.0 Motorised Products

- It is essential that only qualified individuals carry out final connections for motorised products that are connected to the mains supply via a fused spur. Connection by a plug top can be carried out by most individuals.
- One of the main points to observe prior to installation is if cables need to be run and how they are to be protected (if required) and where the connection / termination points will be.
- Installing additional sockets or fused spurs MUST be carried out by a competent electrician and a Part P certificate issued **(see BBSA Guidance Note A12).**
- Battery and solar powered motors can be installed without a competent electrician as they are low voltage.
- Apart from understanding from the order how the motor is to be controlled, particularly if there is more than one product, the installation is no different to that stated for that product type as determined above depending on whether the installation is inside recess or outside recess.
- Always refer to the manufacturer's instructions for setting up and installation of the product.

12.0 Cleaning Up

Without a doubt the most important part of the job is cleaning up after the installation.

Despite using covers, it is still very important to thoroughly clean up the property after their removal.

With the majority of installations carried out at the window, ensure the following are cleaned:

- brick / plaster dust on the window
- brick / plaster dust on the window beading
- window sills and surrounding areas

TIP

If possible use a dust collection cup to collect dust or a vacuum below the point of drilling to catch the majority of plaster / brick dust. Remember to wear a mask when dust is present.

13.0 Commissioning and Demonstration

Upon installation of any product, the installer must carry out a check for the correct operation of the blind, awning or canopy and ensure the product is clean and defect free.

For motorised products the installer must also carry out checks to make sure all required limits are set correctly from the supplier / your factory and / or carry out the re-setting of the limits in line with the supplier's details.

Once the blind or blinds are installed and working as required, it is essential the client is shown how to operate the blinds correctly. The client may be the end user, the tenant of a domestic property or in commercial properties it could be an agent, Facilities Manager or another member of staff.

For a standard product installation the following points should at least be covered:

a. Demonstrate how the blind operates.

b. Identify typical issues to be avoided when operating that particular type of blind i.e. not to pull operating chain across the fabric of a roller blind.

c. Explain and demonstrate the child safety aspects of the particular blind.

d. Point out the warning labels.

e. Go through the installation document your business uses. This may be a one page document or a booklet advising on the installation and the aftercare for the product.

For motorised products we would suggest the following points in addition to the above:

f. Clearly demonstrate how to use the controls and if a remote control unit is used advise which way round to hold the control so the arrows point in the correct direction of the blind being operated.

g. If a number of blinds are controlled using, a multi-channel handset, it is good practice to provide the client with a drawing that clearly identifies which blind is on which channel.

TIP

To reduce call backs advise the client on the need to change the battery in the handset and the signs to look for when the blind / awning does not operate that may indicate a new battery is required.

14.0 Customer Sign Off

Most business will have a sign off document for all or the majority of their installations.

Generally sign off documents are a way to ensure the client is happy with the installation. Since the revision of BS EN 13120 regarding child safety in 2014 it is essential a document is signed by the client to provide an audit trail that appropriate safety items have been installed and the client is aware of the child safety features of the product.

Child Safety Compliance Acknowledgement

I acknowledge and confirm that;

1. I am aware that my blind(s) contain a safety device which is designed to help to prevent accidental strangulation of young children
2. It has been explained to me how this safety device(s) work(s)
3. I have been given written instructions relating to the use of my blind(s)
4. The warning notices have been left on the blind(s)
5. To the extent that I have had opportunity to inspect and operate them, the blind(s) and safety device(s) work to my satisfaction.

Nothing in this Child Safety Compliance Acknowledgement shall affect my statutory rights as a consumer.

Your name (CAPITALS): .....

Signature:..... Date: .....

If customer unable or unwilling to sign use this version:

Child Safety Compliance Acknowledgement

I acknowledge and confirm that;

1. I am aware that my blind(s) contain a safety device which is designed to help to prevent accidental strangulation of young children
2. It has been explained to me how this safety device(s) work(s)
3. I have been given written instructions relating to the use of my blind(s)
4. The warning notices have been left on the blind(s)
5. To the extent that I have had opportunity to inspect and operate them, the blind(s) and safety device(s) work to my satisfaction.

Nothing in this Child Safety Compliance Acknowledgement shall affect my statutory rights as a consumer.

Your name (CAPITALS): .....

Signature:..... Date: .....

Customer unable (or unwilling) to sign this satisfaction note. However, I confirm that the blind(s) have been manufactured and installed in compliance with the child safety requirements of BS EN 13120:2009+A1:2014.

Your name (CAPITALS): .....

Signature:..... Date: .....

Once this document has been signed, it should be returned to the business with the order and filed in line with the company policy and best practice so that an audit trail is maintained.

15.0 Waste Management

A number of Regulations are in place regarding the disposal of waste.

The correct methods and best practice of handling waste not only keeps the business compliant but also reduces the volume of typical waste thereby reducing costs.

Particularly on large construction sites and refurbishment projects the Main Contractor should have places to dispose of recyclable waste such as cardboard and polythene. Some may also allow you to dispose of standard waste.

Your business should have a waste management policy and you should observe this policy.

In addition to the above particular attention should be made to following areas of waste:

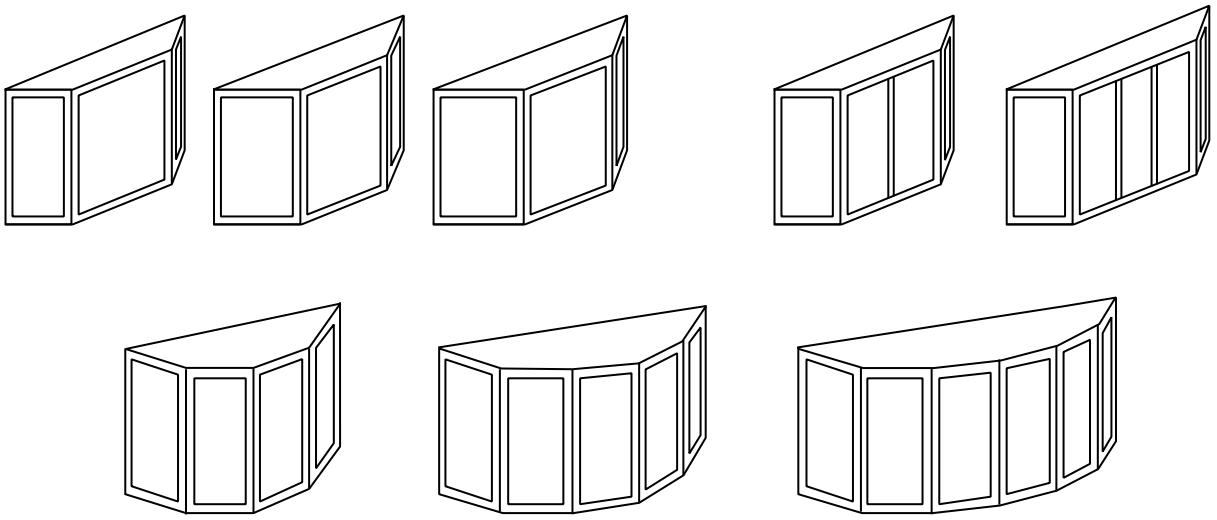
- Disposal of electric motors. Under the WEEE Regulations these motors must be recorded and disposed of in appropriate locations or with specialist waste companies in your local area.
- Disposal of batteries. Under the WEEE Regulations these must be recorded and disposed of in appropriate locations or with specialist waste companies in your local area.
- Disposal of pressurised cans.
- Disposal of harmful chemicals. (These would have been identified when carrying out a risk assessment and under COSHH).
- Disposal of knives. Place tape or cardboard over the blunt blade and wrap so it cannot be easily picked up and cause harm.

16.0 Glossary

Bay Window

A bay window is a window space projecting outward from the main walls of a building and forming a bay in a room.

Available in a number of different styles and designs some popular types are rectangular or three or five sided bays.



Cill or Sill

A slab of stone, or more typically a section of wood, at the base of the window, hence window cill / sill.

Face fix

Here the brackets are fixed in the horizontal plane back to the window or its surrounds.

Grounds

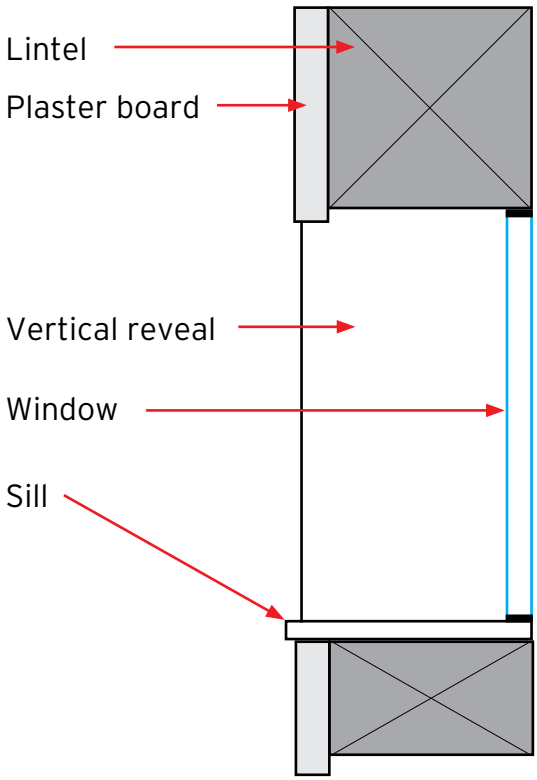
This is a general term used to define the materials or substrate you are fitting to – it could be wood, masonry, steel or another material. It is often used when the fixing substrate is unknown.

Inside recess or Inside reveal

A recess is where the wall typically has a 90 degree return which then meets the window so the window is recessed back from the internal wall. The depth of the recess, or reveal, will vary depending on the age and style of the house and the type of window used.

A blind fitted inside the recess would then be close to the window and contained within the reveal of the window.

Cross section of a typical house window



Lintel

A load-bearing component that spans an opening such as the uprights of a door or window between two columns or piers to support the weight of the wall above the opening. Typically made of steel but concrete lintels are also used.

Cavity Wall

External Solid Wall Construction

Timber Frame Construction

16.0 Glossary

Outside the recess or Outside the reveal

Fitting a blind outside the reveal means installing the blind over the extremities of the recess leading into the window so the blind is level with the internal wall finishes and typically some distance from the window.

Side (end) fix

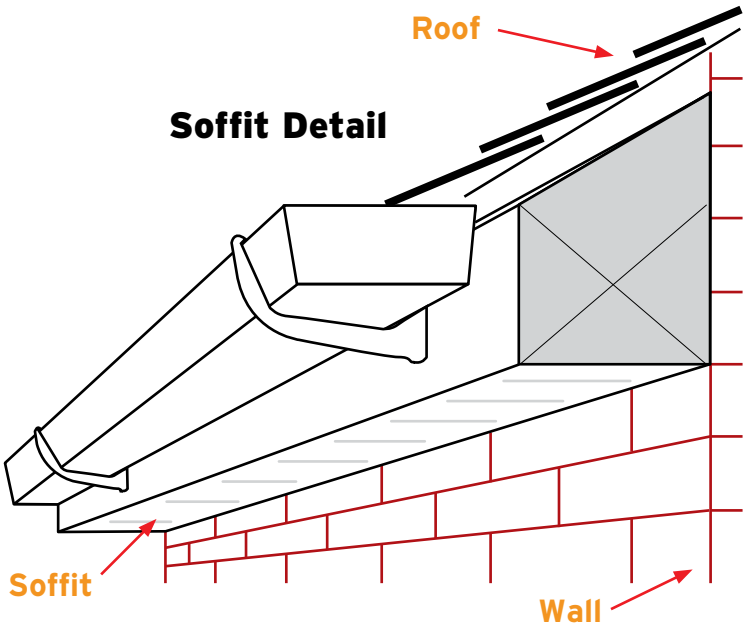
Here the brackets are fixed sideways to the reveal of the window.

Soffit

An architectural term to describe the underside of any construction element.

On an internal blind a soffit is the top part of the window reveal.

On an external blind, especially fitted on a bungalow, the soffit is the section where the overhang of the roof meets the external wall of the building.



Top Fix

Here the brackets are fixed in the vertical plane upwards usually into the soffit above the window.

Notes

Notes

Other Modules in this series

Measuring

Fixings

Motorisation and Automation

Fabrics and Materials

Surveying, Quoting and Estimating

Acknowledgements

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Nantmor Blinds

We are grateful to the following supplier for kind permission to reproduce their drawings

Catnic www.catnic.com

BBSA, PO Box 232, Stowmarket, Suffolk, IP14 9AR

T: 01449 780444 E: info@bbsa.org.uk W: www.bbsa.org.uk