

Using EDIS to manage EI&T projects

A TRAINING GUIDE

After reading this document you should be able to:

- Instruct the contractor how to set up the certificates in a way that they can be tracked
- View certificates and assess the completeness of the work
- Determine how much testing has been done

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1. Introduction

This document provides some tips on using EDIS to track the progress and status of periodic testing projects.

2. Accessing the system

Refer : Accessing EDIS for the first time

3. CREATING EDIS CERTIFICATES

Refer: Training document Creating EDIS certificates

This is only required for contractors who will be doing the testing.

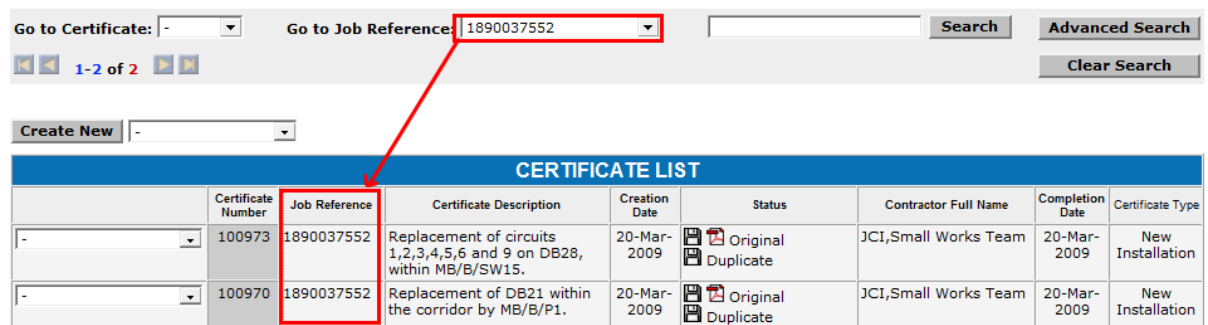
4. Setting up the certificate detail

In order to facilitate the tracking of certificates the contractor should ensure the following aspects are included when they setup a certificate. These parameters are all under the control of the contractor when editing and creating the certificate.

4.1. Ensuring the correct use of the job number field

The Job number on certificate is a project reference number provided by the project manager and appears on the certificate and can be used to group the certificates for a job. Each project should have a job reference number that identifies the work; a group of certificates can have the same job number.

The following figures illustrate how the job reference can be used to view the certificates relating to a job reference.



CERTIFICATE LIST								
	Certificate Number	Job Reference	Certificate Description	Creation Date	Status	Contractor Full Name	Completion Date	Certificate Type
-	100973	1890037552	Replacement of circuits 1,2,3,4,5,6 and 9 on DB28, within MB/B/SW15.	20-Mar-2009	Original Duplicate	JCI,Small Works Team	20-Mar-2009	New Installation
-	100970	1890037552	Replacement of DB21 within the corridor by MB/B/P1.	20-Mar-2009	Original Duplicate	JCI,Small Works Team	20-Mar-2009	New Installation

Figure 1 -By including a common job reference for jobs associated with a project the project manager can filter on a job reference and see all jobs associated with that reference in a building.

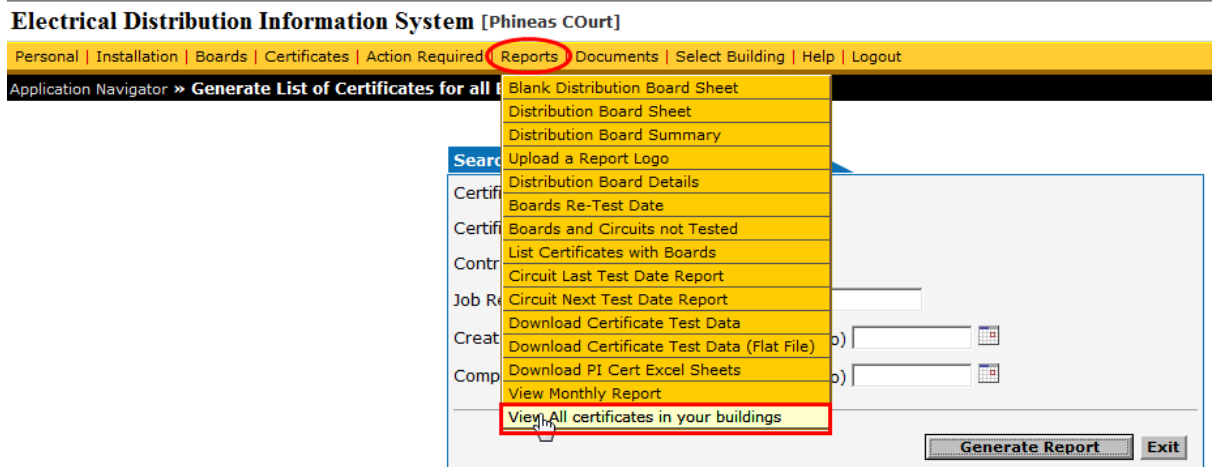


Figure 2- Using the "View all certificates in your buildings" report a user can filter on the job reference to view jobs across multiple buildings; the figure below shows the result.

List of Certificates for all your buildings							
Building: Ashleigh Court							
Certificate No.	Job Ref.	Certificate Type	Certificate Status	Contractor Name	Contractor Organisation	Created Date	
101351	Job-001	Periodic Inspection	Draft	James Johns	James and Son Electrical Ltd	09-Feb-2010	
Building: Phineas Court							
Certificate No.	Job Ref.	Certificate Type	Certificate Status	Contractor Name	Contractor Organisation	Created Date	
101352	Job-001	Periodic Inspection	Draft	James Johns	James and Son Electrical Ltd	21-Feb-2010	

Figure 3 - A report showing a common job reference that is used to track a job across multiple buildings.

4.2. The EDIS certificate Number

EDIS Number on certificate is a unique system generated number and should appear on the certificate. The project manager’s reference is the job reference, while the system reference is the EDIS number – both are useful when locating a certificate.

4.3. The “Purpose of the report”

This is a mandatory field and should clearly describe the project –this description is important for future reference and should be descriptive as possible. If more than one certificate in a job the description can be used to differentiate the certificates, e.g. Certificate 1 of 3 – Periodic EI&T for North Wing.

The project manager should describe the contents of this field to the contractor in to order to ensure that the details are useful for monitoring and for future use of the certificate.

4.4. Contractor LOGO

Ideally the contractors should upload their logo; it will then appear on the certificate making the certificate more recognisable; it is not mandatory.

4.5. CONTRACTOR'S AFFILIATION LOGO

If the contractor has an affiliation e.g. NICEIC – they should include the details

CONTRACTOR'S LOGO

NICEIC

Job-001
EDIS Number: 101351

PERIODIC INSPECTION REPORT FOR AN ELECTRICAL INSTALLATION
Issued in accordance with *British Standard 7671 - Requirements for Electrical Installations*

A. DETAILS OF THE CLIENT

Client:	Property Management Inc, James Murdoch	Address:	Apex Tower 12 Abbey Road W1 5TY
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B. PURPOSE OF THE REPORT This Periodic Inspection Report must be used only for reporting on the condition of an existing installation.

Purpose for which this report is required:	Periodic for testing
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Figure 4 An EDIS certificate first page showing elements used when setting up the certificate.

5. FINDING CERTIFICATES

1. Login
2. Using the main menu select the certificates option

Electrical Distribution Information System [Ashleigh Court]

Personal | Installation | Boards | **Certificates** | Action Required | Reports | Documents | Select Building | Help | Logout

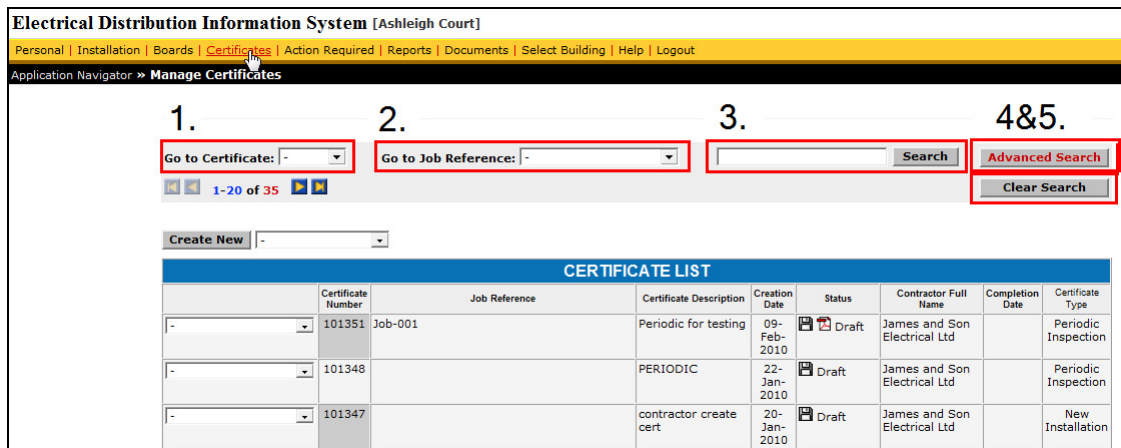
Application Navigator

Current User:	contractor [James Johns]
User Group:	Contractor
Current Building:	Ashleigh Court
Address:	125-129 Lower South Street Barkingdon London Post Code: NB01 0UI
Number of Floors:	12
Building Area:	6000.0 m ²
Description of premises:	-
Building Administrator:	Building Admin Guest

Figure 5- Navigating to the certificates list.

3. **IMPORTANT NOTE: The default view only shows the certificates in draft mode; to see all certificates click the clear search button.**

4. On the certificate list page there are 5 buttons:
 - a. 1 - Go directly to s certificate using the EDIS number
 - b. 2 - Use the Job Ref to filter the certificates
 - c. 3 - Searchusing a general text search on the Certificate Description field, e.g. a search on “Media Village-2010” will search for that phrase across all the certificate descriptions for that building.
 - d. The advanced search allows a fine grained search to be done using dates, contractor, and status.
 - e. The clear search button is used to show all the certificates without applying any filter



6. VIEW CERTIFICATE DATA AND MEASURING PROGRESS

6.1. Certificate PDF

Certificates can be viewed in PDF format from the certificates list;

1. Clicking on the disk associated with the certificate will re-generate the certificate
2. Mouse over the PDF to see the date on which it was generated
3. Clicking on the PDF to view or download the current certificate

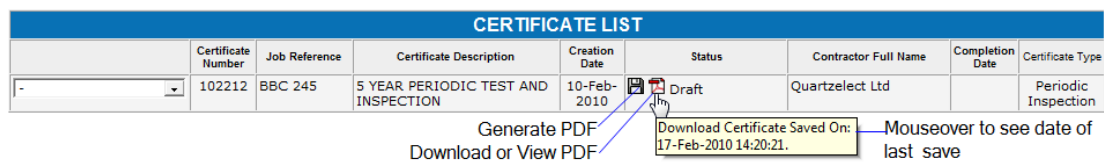


Figure 6- Viewing the certificate details

6.2. Measuring the work done (circuits tested)

If the project manager needs to measure how much testing has been completed EDIS provides an Excel download of the test data. The Excel sheet can then be viewed to determine the number of circuits tested. The following approach can be used:

1. From the reports menu select one of the download options:
 - a. Download certificates test data- this downloads all the test data

- b. Download certificates test data (Flat file) – similar to a), but each line is a complete record
- c. Download PI cert Excel sheets – similar to a) but also includes

Electrical Distribution Information System [Sunley Tower]

Personal | Installation | Boards | Certificates | Action Required | **Reports** | Documents | Select Building | Help | Logout

Application Navigator » **Generate Certificate Test Data Report**

Go to Certificate: 1 of 1

Generate Report

- Blank Distribution Board Sheet
- Distribution Board Sheet
- Distribution Board Summary
- Upload a Report Logo
- Distribution Board Details
- Boards Re-Test Date
- Boards and Circuits not Tested
- List Certificates with Boards
- Circuit Last Test Date Report
- Circuit Next Test Date Report
- Download Certificate Test Data
- Download Certificate Test Data (Flat File)
- Download PI Cert Excel Sheets
- View Monthly Report
- View All certificates in your buildings

SEARCH [] **Advanced Search**

DATE LIST						
	Certificate Number		Status	Contractor Full Name	Completion Date	Certificate Type
<input checked="" type="checkbox"/>	102212	5 YEAR INSP	0	Draft	Paul Kay	Periodic Inspection