



MANAGING OBSERVATIONS AND RECOMMENDATIONS WITH EDIS

PROCESS FOR MANAGING OBSERVATIONS AND RECOMMENDATIONS





Purpose of the Presentation

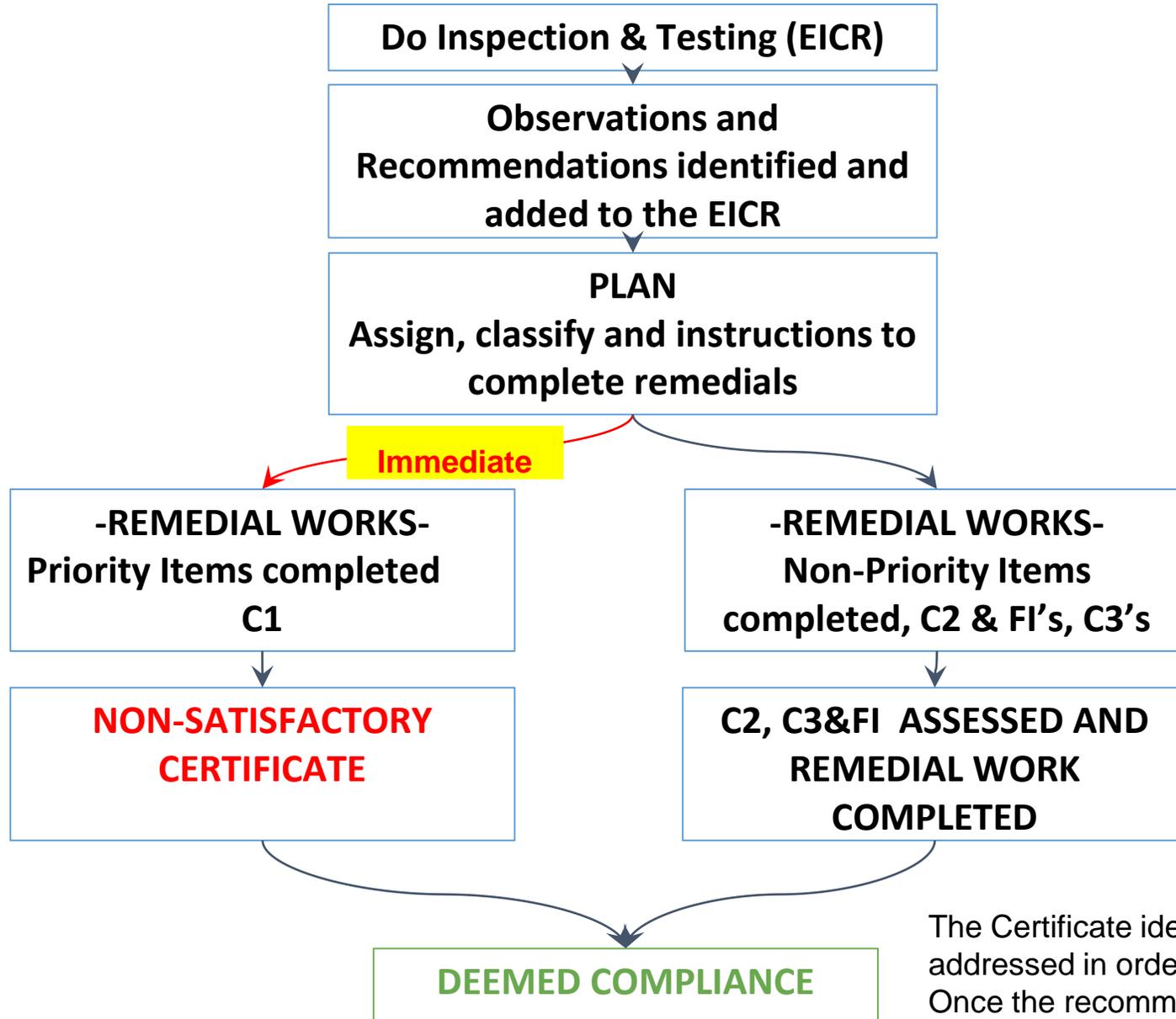
The Electrical Inspection Condition Report (EICR) results in Observations and Recommendations. These observations are risks and need to be addressed.

EDIS provides a workflow for tracking the observations from the point at which they are created in the system through to the point where they have been reviewed, addressed and are deemed an acceptable risk.

This presentation describes the process of reviewing ,updating and closing observations identified during the EICR process.



Bird's Eye View for handling Observations and Recommendations



CLASSIFICATION OF OBSERVATIONS

C1 - Danger present: Risk of injury immediate remedial action required.

C2 - Potentially dangerous: Urgent remedial action required

C3 - Improvement Recommended.

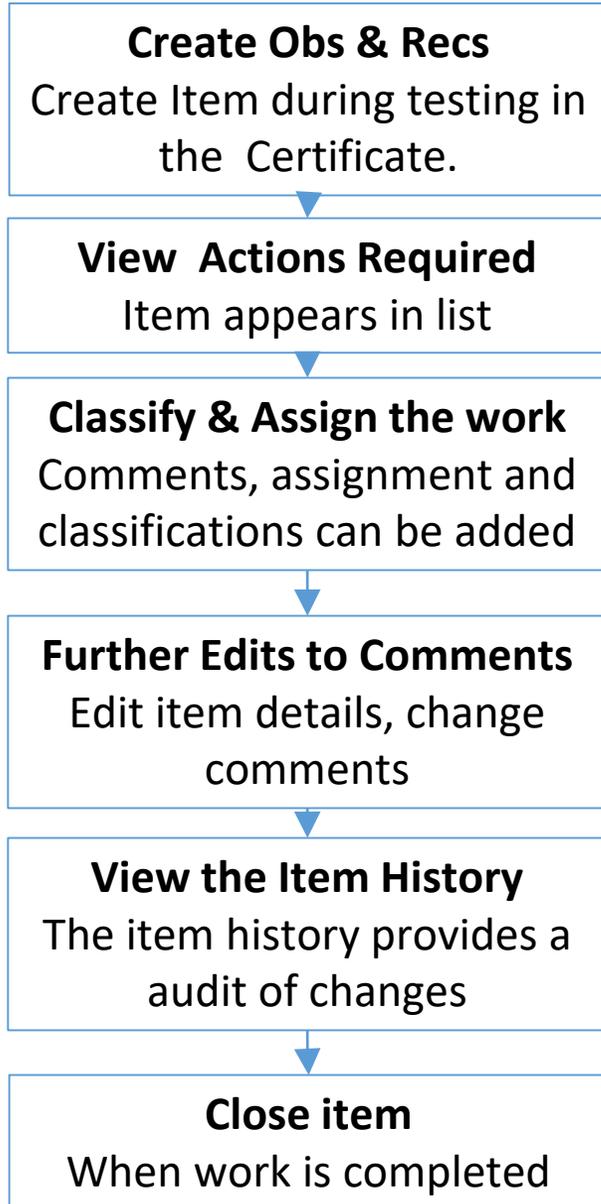
FI - Further investigation

C1's, C2's and FI's:

The code **NCFF**, "Non-conformance found and attended to", can be assigned to items that have been address during the inspection and testing phase.

The Certificate identifies Observations and Recommendations that need to be addressed in order for the certificate to be satisfactory. Once the recommendations have been implemented - the building can be deemed compliant

PROCESS STEPS FOR MANAGING OBSERVATIONS AND RECOMMENDATIONS



1. Observations and recommendations are created during the testing process and capture into certificates. Use the Edit Certificate menu option to add general observations, inspection schedule and circuits.
2. Observations and recommendations appear on the Actions Required List as soon as the Observation is added to the certificate. From the Action Required list they can be tracked, filtered and edited.
3. The work item can be Classified and Assigned, The Action Required can be updated, changes and commented on by editing the form in the browser or in bulk by download/uploading using Excel. Use Actions Required Excel download/Upload for the bulk updates
4. The item can be edited and updated during over the life of the item; each change is stored. During the life of the item it may be assigned to different persons, the comment in the observation should determine the action for the assignee.
5. Each change is stored and a full record of the changes can be viewed
6. When the work is completed the item status should changed to CLOSED. Use the Action Required menu option. The person responsible for the risk should be responsible for closing an items

Classify, assign and comment



Classifying - The observations can be classified using pre-defined categories, the purpose is to group the observations into categories that can be delivered by the same mechanism, e.g Internal team

	B	C	D	E	F	G	H	I	J	K
	Building Name	Item Type	Certificate Number	Cert Status	Item Number	Board/Circuit	Item Group	Item description	Item Text	Severity Code
1										
2	Build202/2	General Observation	102512	draft	3	1.1.1 DB, 11 L1, p2	Major works	Measures Zs exceeds maximum allowable value	some testing	C1
3	Build202/2	Circuit Observation	102512	draft	1	1.1.1 DB, 11 L1	Further Inspection Required	Remedial work carried out during testing	cct obs	FI
4	Build202/2	General Observation	102512	draft	2	1.1.1 DB, 11 L1, p1	Minor Works	RCD or RCD replacement required	testing obs	C2
5										

Assigning, commenting and updating the current status can be done by editing the columns: Current State, Comments, Assigned to email. Each change is recorded and can be reviewed when required

	F	G	H	I	J	K	L	M	N	R
	Item Number	Board/Circuit	Item Group	Item description	Item Text	Severity Code	Current State	Status	Comments	Assigned to email
1										
2	3	1.1.1 DB, 11 L1, p2	Major works	Measures Zs exceeds maximum allowable value	some testing	C1	action required	open		
3	1	1.1.1 DB, 11 L1	Further Inspection Required	Remedial work carried out during testing	cct obs	FI	action required	open		
4	2	1.1.1 DB, 11 L1, p1	Minor Works	RCD or RCD replacement required	testing obs	C2	action required	open		

On completion of the work, the risk is reassessed and if acceptable the item can be closed

BULK UPDATES TO THE ACTIONS REQUIRE



Estate 202



Build202/2

1. Login EDIS, select the target Estate and Building
2. Select the Actions Required menu option
3. Click the Blue Reports Button
4. Download the excel report for Actions Required
5. Edit the Excel report via Excel
6. Save the Excel Report
7. Then Import the Excel report

Site Administration ▾ Supply Details Distribution Network Boards Certificates Action Required Documents and Drawings

Dashboard / Action Required

Open Closed All

Action Required

Reports ▾

- Export Action Required
- Import Action Required

Action	Item No	Cert No	Observation Group	Item Description
	<input type="text" value="search"/>	<input type="text" value="102506"/>	<input type="text" value="search"/>	<input type="text" value="search"/>
<input type="text" value="-"/>	71	100242 Draft	Further Inspection Required	5.1.2.3 Provision of additional protection by RCD ...
<input type="text" value="-"/>	70	100242 Draft		4.23 Adequate arrangements where a generating set...



UPDATING THE EXCEL SHEET

1. Firstly, download the excel sheet

2. Assign the item to a group, e.g. Minor Work, Major Work or some other category. Categories can be created by the building administrators.

	B	C	D	E	F	G	H	I	J	K
	Building Name	Item Type	Certificate Number	Cert Status	Item Number	Board/Circuit	Item Group	Item description	Item Text	Severity Code
1	Build202/2	General Observation	102512	draft	3	1.1.1 DB, 11 L1, p2	Major works	Measures Zs exceeds maximum allowable value	some testing	C1
2	Build202/2	Circuit Observation	102512	draft	1	1.1.1 DB, 11 L1	Further Inspection Required	Remedial work carried out during testing	cct obs	FI
3	Build202/2	General Observation	102512	draft	2	1.1.1 DB, 11 L1, p1	Minor Works	RCD or RCD replacement required	testing obs	C2

3. Update the State, status and Assignee for the certificate

	F	G	H	I	J	K	L	M	N	R
	Item Number	Board/Circuit	Item Group	Item description	Item Text	Severity Code	Current State	Status	Comments	Assigned to email
1	3	1.1.1 DB, 11 L1, p2	Major works	Measures Zs exceeds maximum allowable value	some testing	C1	action required	open		
2	1	1.1.1 DB, 11 L1	Further Inspection Required	Remedial work carried out during testing	cct obs	FI	action required	open		
3	2	1.1.1 DB, 11 L1, p1	Minor Works	RCD or RCD replacement required	testing obs	C2	action required	open		

4. Finally, upload the certificate and check the Actions Required list to ensure the updates have been applied as expected



QUESTIONS?

Videos and further information:

<http://www.electricalcertificates.co.uk/video-managing-actions-required>

Email: support@electricalcertificates.co.uk

Tel: 0333 772 0829