



EDIS USER GUIDE

CREATING AND COMPLETING ELECTRICAL CERTIFICATES

(EDIS is the Electrical Distribution Information System)

www.electricalcertificates.co.uk



After reading this document you should be able to:

- Create and complete electrical certificates

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1 Pre-requisites

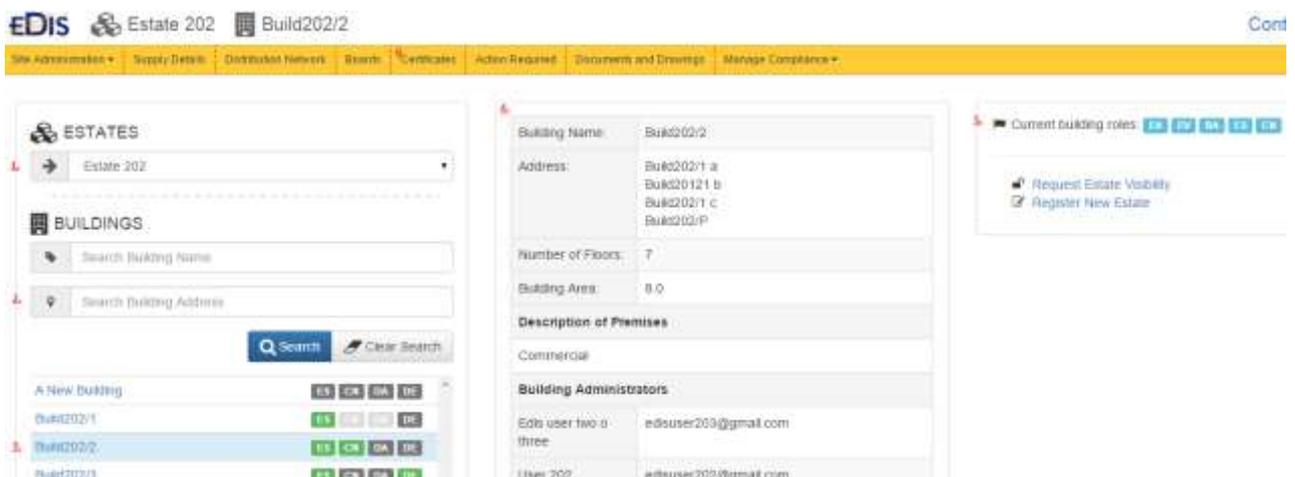
1. You should be registered on the EDIS system; www.electricalcertificates.co.uk
2. Have requested and received estate visibility for the Estate in which you are doing work
3. Have requested and received building access rights for the building in which you are working

2 Login and select the building

Login at www.electricalcertificates.co.uk

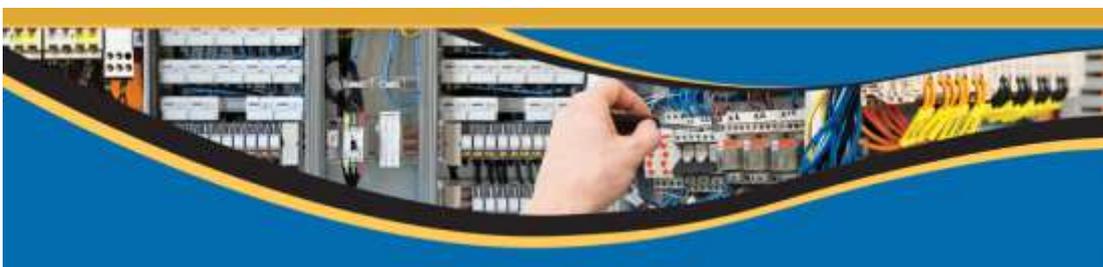
The screenshot below shows the EDIS Dashboard page:

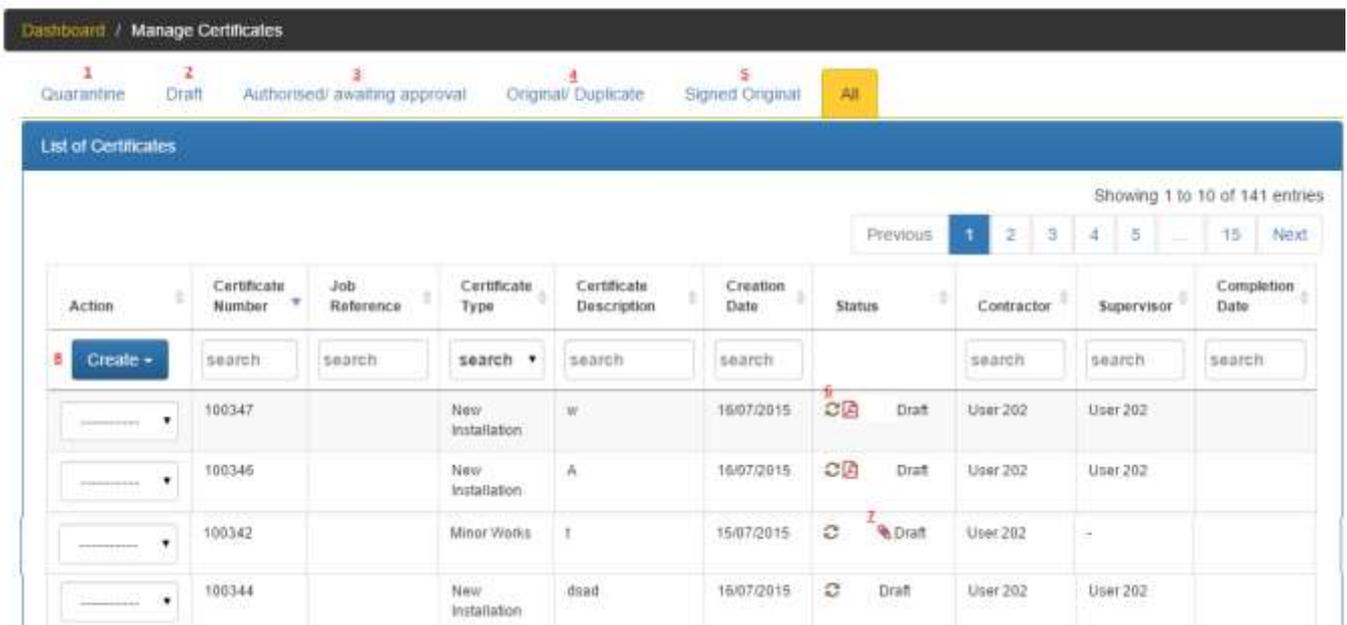
1. Select the required Estate
2. Search for a building
3. Select the required building
4. Check the building details
5. Check your permissions
6. **Click the certificates option on the main menu**



3 Certificate statuses and Step-1 (first page)

After clicking the certificates menu option you will be presented with a list of certificates currently in the building. The certificates list has a number of features, the screenshot below lists the features:





EDIS certificates have three statuses:

1. <u>QUARANTINE</u>	2. <u>DRAFT</u>	3. <u>AWAITING AUTHORISATION</u>	4. <u>ORIGINAL/DUPLICATE</u>	5. <u>SIGNED ORIGINAL</u>
Certificates uploaded from EDIS Local are placed in quarantine before being processed.	Certificate has been started, but is not yet completed.	Certificate has been certified as complete by the contractor/electrician.	Certificates that have not been fully completed	Certificate has been signed off by all parties

6. Refresh the certificate: Click this icon to regenerate the certificate PDF. The PDF is auto generated when a status changes, to update a draft certificate the refresh icon should be clicked.
7. Certificate attachments can be loaded, if an attachment is loaded the paper clip is shown
8. Click the Create button to create a certificate

4 Create the certificate template

Clicking Create and selecting the certificate type will generate a draft certificate; this will open a form with default information pre-populated:

Action	Certificate Number	Job Reference	Certificate Type	Certificate Description	Creation Date	Status	Contractor	Supervisor	Completion Date
Create	search	search	search	search	search		search	search	search
			New Installation	w	16/07/2015	Draft	User 202	User 202	
			New Installation	A	16/07/2015	Draft	User 202	User 202	
			New Installation	ty	16/07/2015	Draft	User 202	User 202	

EDIS provides 3 options for loading certificates:

- New installation
- Minor Works
- Condition Report

Non-EDIS Certificates should only be used for historical certificates; all new certificates should be created using the above options.

Dashboard / Manage Certificates / Edit - Condition Report

Condition Report - 100348 Step 1

Step 1 Basic info Associated Boards Additional Comments

Details of the Client

Client	Org Resp , Responsible Person 202	Created	16/07/2015
Address	1RP addr202 2RP addr202 3RP addr202 PRP 202	Completed	N/A
		Edition of Certificate	17th

Purpose of the Report

*Description Condition report northwest side of the Tower Block

Step 1:

- **Basic information:** Provides the certificate details
- **Associating Boards** with a certificate is achieved when clicking on the [Associated Boards](#) link.
- **Additional Comments** allows the electrician to enter a risk assessment or any other reportable comments; the test is included in the PDF report on the last page.

Step 2:

Provides the templates for entering Observations and Recommendations for Action

Step 3:

Allows the selection and editing of the Supply and Earthing details

Step 4:

User create and edit the board and circuit details

Step 5:

Certification step

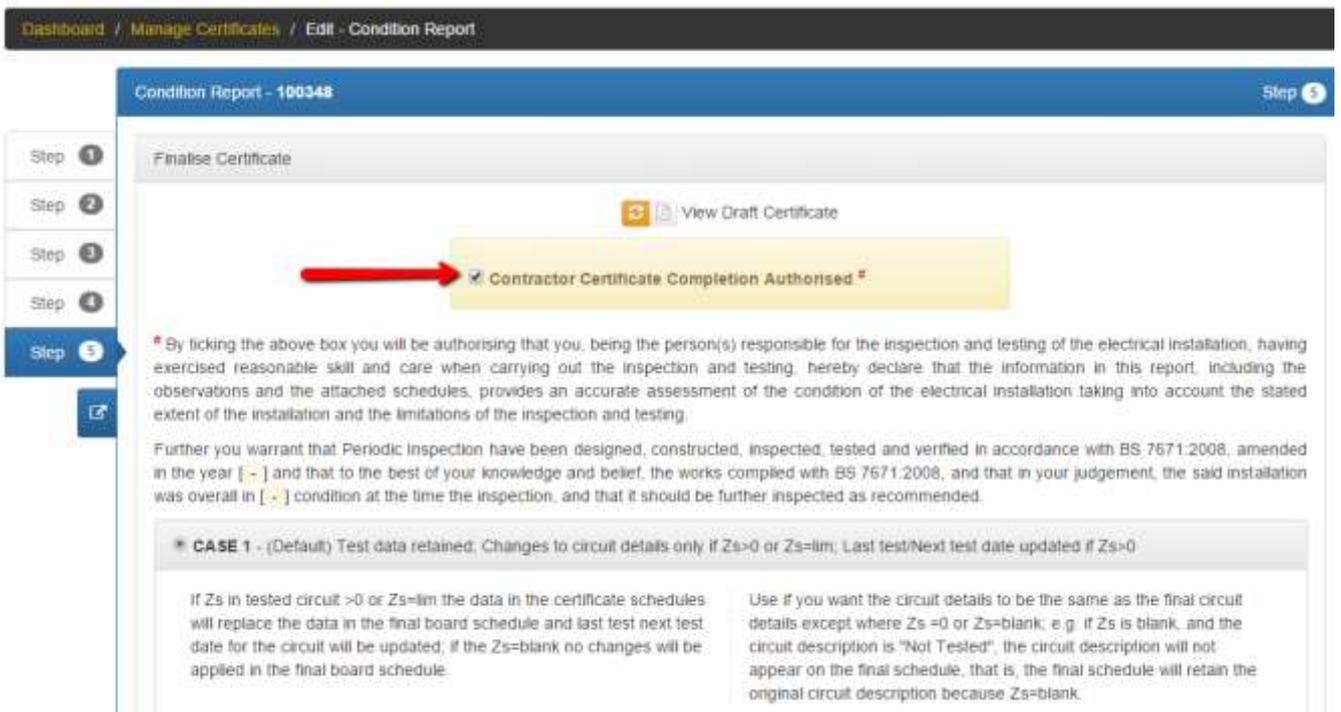
5 Saving and Editing a certificate

At any stage in the process a Draft certificate can be saved and then accessed at a later stage for editing. From the certificate list, select edit from the Action column next to the certificate.

Action	Certificate Number	Job Reference	Certificate Type	Certificate Description	Creation Date	Status	Contractor	Supervisor	Completion Date
<div style="border: 1px solid black; padding: 2px;"> Create </div>	search	search	search	search	search		search	search	search
<div style="border: 1px solid black; padding: 2px;"> Edit certificate Delete certificate Sign-off Status Add Attachments Export Boards Report </div>	100347		New Installation	w	16/07/2015	Draft	User 202	User 202	
			New Installation	A	16/07/2015	Draft	User 202	User 202	
			New Installation	ty	16/07/2015	Draft	User 202	User 202	

6 Signing off a certificate

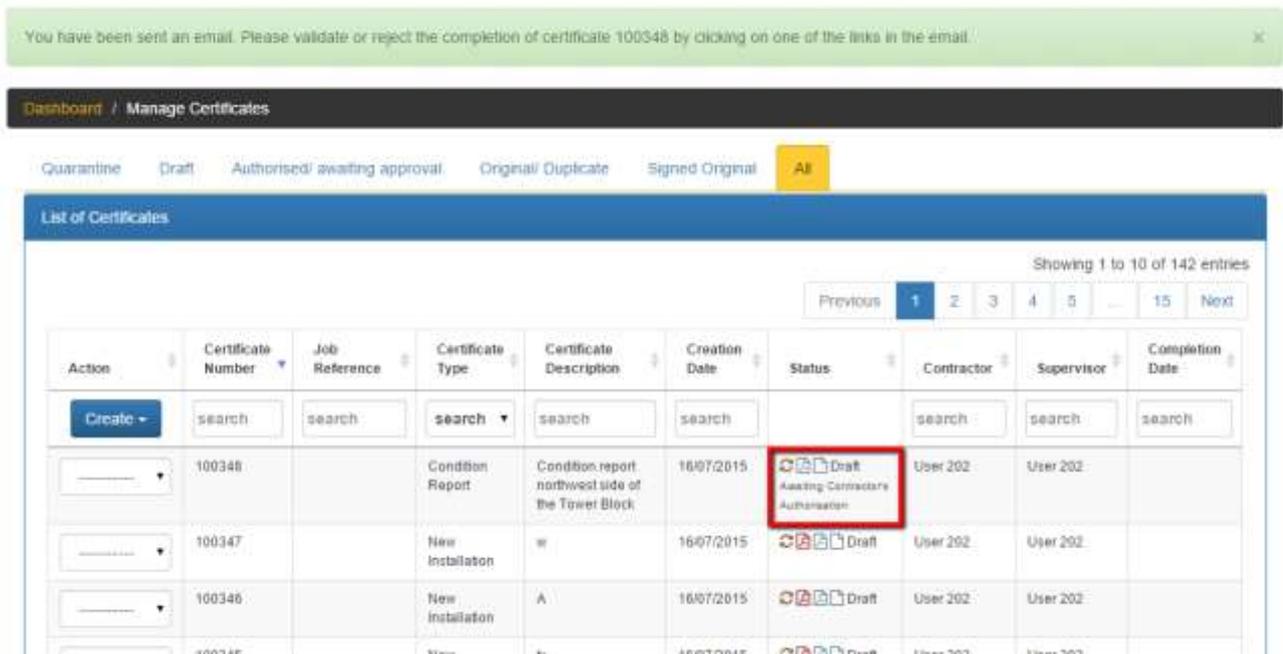
When the certificate has been complete it must be certified by clicking the box in Step-5.



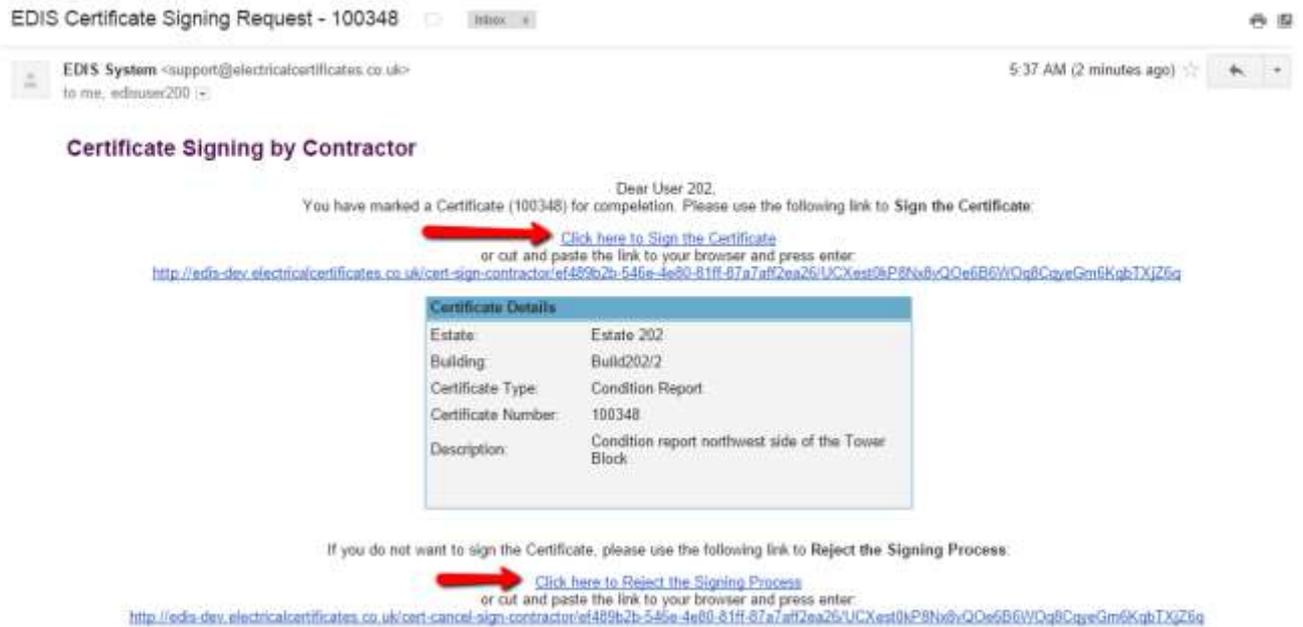
Sign-off is completed digitally- there is a two stage sign off process:

1. The electrician signs into EDIS and certifies the certificate is completed
2. An email is sent to the electrician and other signatories – they then click a link in the email to confirm the certification and completion of the certificate.

After certifying the certificate the user is sent an email and the certificate status changes to **Awaiting Contractors Authorisation**

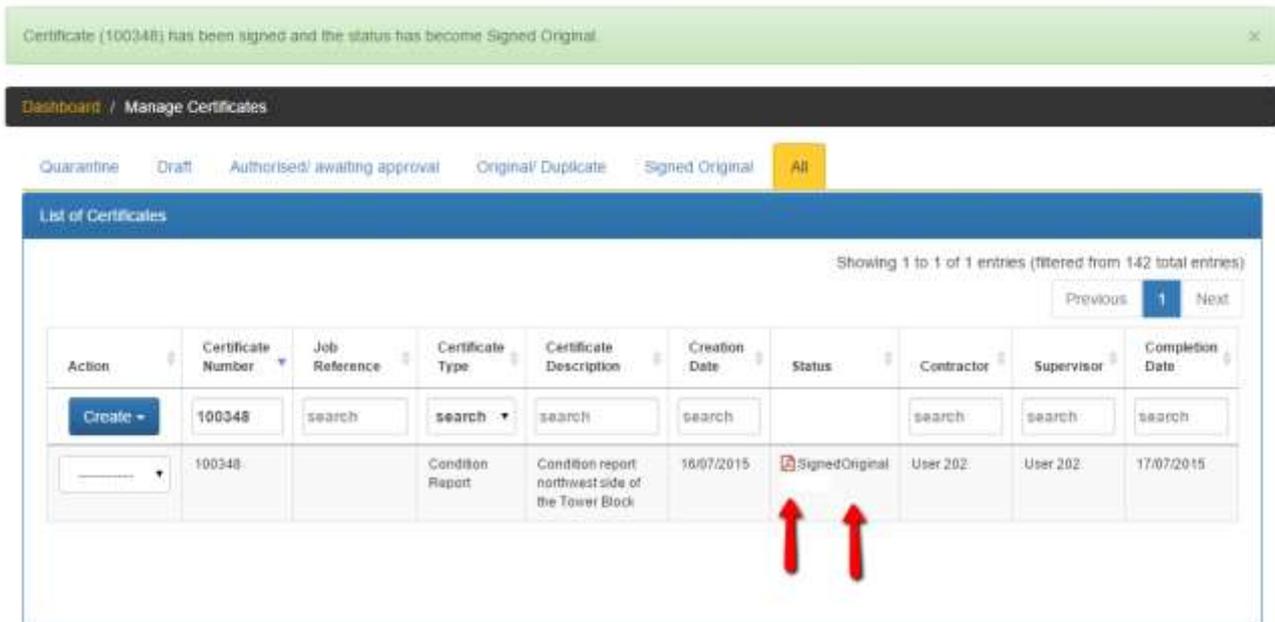


The user must now check their email and confirm the certification by clicking the link in the email.



On clicking the 'Click here to sign certificate link' the certificate will be changed to 'Signed Original'.

The certificate can now be downloaded if required.



7 Certificates requiring multiple parties

When multiple parties need to sign off a certificate each party will receive a link via email that they will need to click before the certificate is certified, any party can reject the certificate. If rejected the sign-off process will need to be initiated again by the contractor.