



File name: Upload non-EDIS CertificatesAttachmentsImages

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Loading non-EDIS certificates and General files into EDIS

After reading this document you should be able to:

- Understand the different options for loading files into EDIS
- Load, review and delete loaded files into EDIS using the different options

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2 Options for loading files into EDIS

There are a number of different ways to load files into EDIS – both general purpose and specific.

2.1 Loading general documents

General documents are load via the Main Menu/Documents and Drawings menu option. This is a general purpose document store, which allows any document to be loaded into EDIS. Finding the document is easy, simply use the search option and enter any portion of the document tile or description and click search.

Site Administration | Personal | Installation | Boards | Certificates | Action Required | Reports | Documents and Drawings | Select Building | Help | Logout
 Application Navigator » Manage Documents and Drawings User: M

Go to Document: ---- Show All ---- Enter description text to search for: qua Search
 1 of 1 Clear Search

Add a Document or Drawing

DOCUMENT LIST							
Item	Document Title	Document Description	File Name	Document Date	Date Uploaded	Used in Board	
>	view quarantine	view quarantine	dc04977a-b41e-11e3-83ec-22000a21a237.jpg	25-Mar-2014	25-Mar-2014	123123 C/O P	

2.2 Loading distribution board related documents

EDIS provide distribution board data which can be updated and edited. Any additional documents related to distribution boards, e.g. condition reports, images can be loaded via the main menu option: Main Menu/Boards, each board has a number functions available – select the Manage Board Documents option, to add and edit documents associated with the board.

Site Administration | Personal | Installation | Boards | Certificates | Action Required | Reports | Documents and Drawings | Select Building | Help | Logout
 Application Navigator » Manage Distribution Boards User:

+ New Board Go to Board : - Advanced Search Select Report Generate Records Pages 1-2 1

BOARD LIST - 100 Acre Wood

Current Boards Obsolete Boards Recent Boards All

Item	Board Ref.	Board Type	Board Function	Board Section	Floor	Location
-	123123 C/O P	N/A	N/A	N/A	N/A	N/A
-	123123 C/O P	N/A	N/A	N/A	N/A	N/A
-	1234567 ACB	N/A	cc	N/A	N/A	N/A
-	2MQY DB	N/A	Power	N/A	N/A	N/A
-	55 ACB	N/A	Power	N/A	N/A	N/A
-	aaaTest DB	N/A	N/A	N/A	N/A	N/A
-	as001 DB	N/A	A boards	N/A	N/A	N/A
-	A TEST DB	board type	Board func	sect	fl	loc
-	board1try2 DB	N/A	testing purpose only	N/A	top	N/A
-	board1try3 DB	N/A	testing only	N/A	top	N/A

2.3 Loading certificate related documents

Occasionally historical test certificates need to be loaded into EDIS, to meet this requirement EDIS allows users to create “non-EDIS certificates” records and load the associated document into EDIS.



Records 1- 20 of 101 Pages 1 of 6

CREATE NEW - [Dropdown] **Advanced Search** [Icon]

CERTIFICATE LIST - 100 Acre Wood

Authorized/awaiting approval Original/Duplicate Signed Original

Certificate Number	Job Reference	Certificate Type	Certificate Description	Creation Date	Status	Contractor
105036		New Install.	test ni	08-Apr-2014	Draft	User two
105035		New Install.	sample ni x1	08-Apr-2014	Draft	User two
105034		New Install.	some descripti ..	08-Apr-2014	Draft	User two
105029		Periodic Ins.	ccc	01-Apr-2014	Draft	Michael J
105027	1234	Periodic Ins.	CONDITION REPO ..	22-Mar-2013	Non-EDIS Cert Attachments	Michael J
105026	test1	New Install.	a sample Non-E ..	20-Mar-2014	Non-EDIS Cert	User two

After clicking the create /Non-EDIS Certificate option, complete the form and select the target document, then save. The non-EDIS certificate will be loaded into the certificate list.

Create Non-EDIS Certificate

Certificate Number: ... Status: **Signed Original**

Certificate Type: * [Dropdown] Job Reference: [Text Box]

Certificate Description: * [Text Area] (maxm. 255 characters)

Creation Date: * [Date Picker] Completion Date: * [Date Picker]

Next Inspection Date: * [Date Picker]

Contractor: * [Dropdown]

Supervisor: * [Dropdown]

Certificate File: * [Choose File] No file chosen

[Save and Exit] [Cancel]

Open [Icon] [Close]

Look in: 2014 [Dropdown]

My Recent Documents

Condition report - 2015

2.4 Loading certificate attachments


Documents and attachments associated with a certificate can be added to the certificate record, e.g. Limitations or other details. Certificate attachments can be added to both EDIS certificates and non-EDIS certificates.

To view the attachments click the attachments link on the certificate record.

EDIS / Demo Estate/ 100 Acre Wood









Site Administration | Personal | Installation | Boards | Certificates | Action Required | Reports | Documents and Drawings | Select Building |

Application Navigator » Manage Certificates

Create New - Advanced Search  Records Pages 1- 20 of 101 1 of 6

CERTIFICATE LIST - 100 Acre Wood

Quarantine Draft Authorised/awaiting approval Original/Duplicate Signed Original

	Certificate Number	Job Reference	Certificate Type	Certificate Description	Creation Date	Status	Contract
 	Search ...	Search ...	Select ▼	Search ...			Search
-	105036		New Install.	test ni	08-Apr-2014	 Draft	User two 0
	105035		New Install.	sample ni x1	08-Apr-2014	 Draft	User two 0
	105034		New Install.	some descripti ...	08-Apr-2014	 Draft	User two 0
	105029		Periodic Ins.	ccc	01-Apr-2014	 Draft	Michael Jou
-	105027	1234	Periodic Ins.	CONDITION REPO ...	22-Mar-2013	 Non-EDIS Cert  Attachments	Michael Jou

2.5 Load Estate wide messages

EDIS building administrators can load estate wide messages that appear on the Select Building page (the first page after logging into EDIS). The messages appear to all users associated with an Estate; this provides an ideal way to broadcast messages to EDIS users.

The screenshot below shows the Estate Messages.

EDIS / Demo Estate

Site Administration | Personal | Select Building | Help | Logout

Application Navigator » Select Building

BUILDINGS

Select Estate: Demo Estate

Building Name: **Search**

Building Reference: **Clear Search**

Building Address:

Buildings 1-3

- [100 Acre Wood](#)
- [A test building](#)
- [A test building 2](#) [Request User Rights](#)

SELECT REPORT

ESTATES

[Request Estate Visibility](#)


[Request New Estate](#)

MANAGE ELECTRICAL TESTING

BETA [Option 1: Manage Electrical Compliance](#)

[Option 2: Manage Electrical Compliance](#)

ESTATE MESSAGES AND COMMENTS

Title/Message	Posted By	Date
 ELECTRICAL TESTING PLAN COMPLIANCE 2014 Plan for the electrical testing regime for 2014	Michael Joubert	10/05/14 <i>NEW</i>

To create an estate wide message, you will need to be a building administrator. Select Site Administration/Manage Front Page Messages – from there you can create a message and load an associated file.

EDIS / Demo Estate

Site Administration | Personal | Select Building | Help | Logout

Manage Report Recipients Emails | **Front Page Messages**

Manage User Rights

Set Certificate Colours

Manage Front Page Messages

Approve Estate Access Request

Approve Building Request

Manage Buildings

Enter description text to search for:

Exit

MESSAGE LIST				
	Item	Message Title	Message Description	File Name
	1	ELECTRICAL TESTING PLAN COMPLIANCE 2014	Plan for the electrical testing regime for 2014	9803ce93-d824-11e3-83ec-22000a21a237.doc

Go to Message: Enter description text to search for:

1 of 1

Exit

MESSAGE LIST				
	Item	Message Title	Message Description	File Name
-	1	ELECTRICAL TESTING PLAN COMPLIANCE 2014	Plan for the electrical testing regime for 2014	9803ce93-d824-11e3-83ec-22000a21a237.doc

3 EDIS TERMINOLOGY

1. **Select Building Page** – The first landing page after logging into EDIS; allows the user to select the Estate and Building to work on.
2. **Estate** – A group of buildings, managed by an Estate Manager
3. **Building** - A building in an estate, managed by building administrators
4. **User** – any person with an EDIS login
5. **Data Administrator** – can create and edit certificates, but cannot sign them off
6. **Contractor** – can create edit and authorise certificates as complete
7. **Supervisor** – can accept certificates, once the certificate has been signed by the Supervisor the certificate is deemed a Signed Original
8. **Building Administrator** – can assign rights to Users
9. **Estate Administrator**- Is the person creating the Estate, is the first Building Administrator by default