



EDIS USER GUIDE

MANAGING AND PLANNING ELECTRICAL COMPLIANCE

(EDIS is the Electrical Distribution Information System)

www.electricalcertificates.co.uk



After reading this document you should be able to:

Use the Manage Compliance function to review and plan the electrical inspection and testing schedule

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1 Pre-requisites

1. You should be registered on the EDIS system; www.electricalcertificates.co.uk
2. You must have requested and received estate visibility for the Estate in which you are doing work
3. You must be a building administrator for the Estate in which you are doing the electrical compliance

2 (If you do not have Building Admin permissions, please follow the steps in 7 Approach to creating a plan

Appendix: Requesting Building Administrator rights for an estate)

3 How EDIS defines electrical compliance

EDIS defines two dates for a determining the circuit compliance:

- **Last test date** – this is the last date that the circuit was inspected and tested
- **Next test date** - this is the next test date recommended by the electrician who last tested the circuit. The next test date is captured during the certificate creation process and transferred to the circuit when the certificate is completed.

In general, if the next test date is in the past, EDIS deems the circuit due for inspection and testing and therefore non-compliant.

- **Planned test date:** is defined by the compliance planning manager and is the date on which the next test data is planned.

4 The Manage Compliance menu options

The Manage Compliance menu option has three processes:

1. **Create a compliance plan:** this makes a copy of the current data and places it into a separate “bucket” or set of tables. The data in these tables can then be updated and changed without affecting the current data during the planning process.
2. **Modify the plan:** this allows the user to update the planned test dates and review and refine the plan.
3. **Apply the plan:** once the planning process is completed, the plan can be applied, this updates the current data.

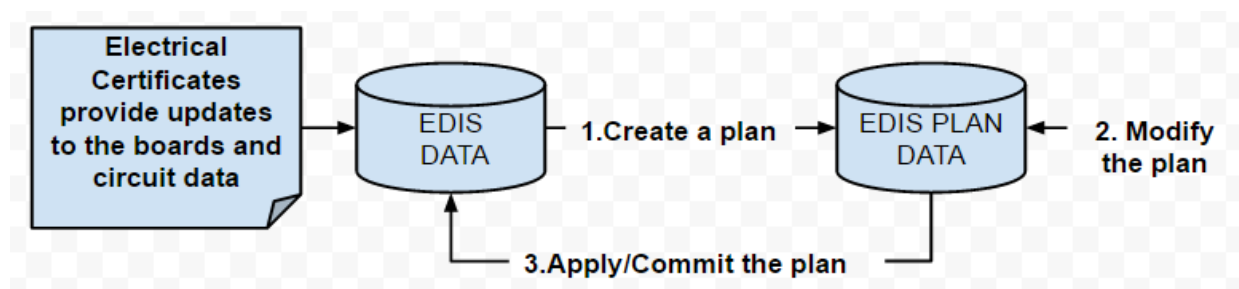


Figure 1 - The graphic illustrates the EDIS Compliance Management data flow. The circuit and board data is updated when certificates are completed. The board and circuit data is extracted from EDIS and posted into an EDIS Plan, the planned test date is modified then posted back to the EDIS. Each board and circuit then has a planned date.

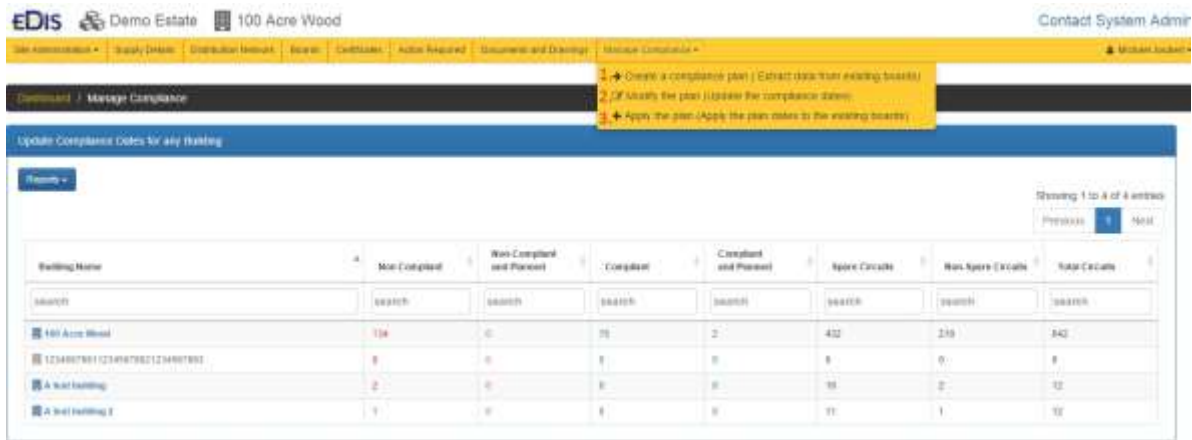


Figure 2 Selecting the Compliance Management menu option and associated planning functions

5 The Compliance Summary

5.1 EDIS Method for reporting compliance status

The circuits for the entire estate are divided into Spare and Non-Spare circuits; spare circuits are not connected and therefore not subject to testing. The Non-Spare circuits are in turn divided into: Compliant (next test date is in the future) and Non-Compliant (next test date is in the past). The Compliant and Non-Compliant status of a circuit is dependent on the Next Test.

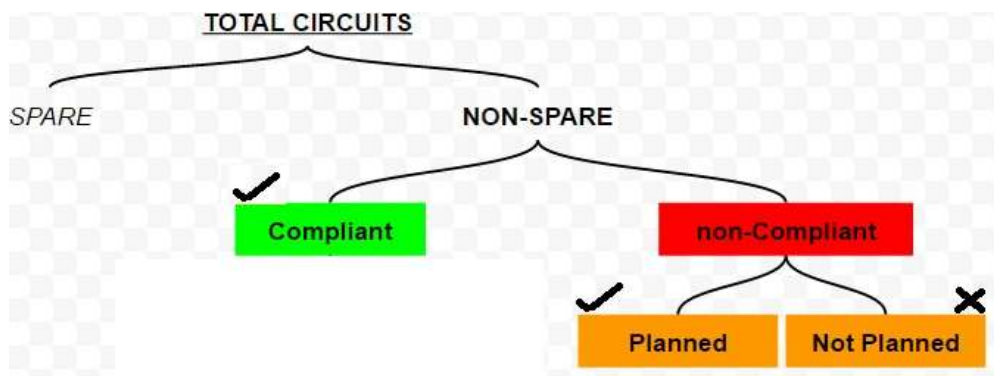


Figure 3 - For compliance planning purposes the circuits in a building are placed into categories. The electrical inspection and testing of circuits that are in the Non-spare, Non-compliant category need a planned test date

Each of the categories has a specific method for determining whether a circuit fits into the category:

- **NON-COMPLIANT:** The next test date is in the past **or** the planned test date is in the past
 - **PLANNED:** The planned date is a date in the future

- **NOT PLANNED:** There is no planned date OR the planned date is in the past
- **COMPLIANT:** Next test is a date in the future

The Next Test date is usually defined by the electrician installing the equipment and is defined in the New Installation, Condition Report or Minor Works documents captured in EDIS. It can also be set by the EDIS supervisors using the compliance management feature or the edit circuits feature.

The planned test date must be set by the building administrator during the compliance planning process

The screenshot below shows the Compliance Status for a building. This is accessed by clicking the Manage Compliance menu and selecting the Modify Plan option

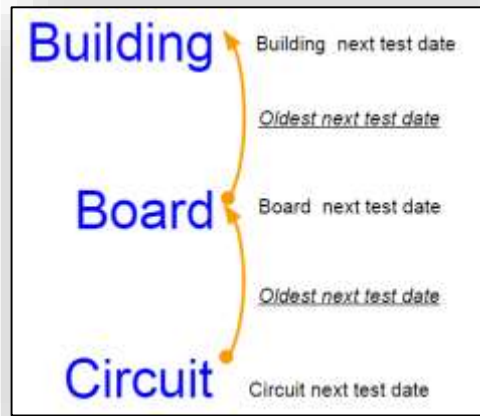
Building Name	1. Non-Compliant	2. Non-Compliant and Planned	3. Compliant	4. Compliant and Planned	5. Spare Circuits	6. Non-Spare Circuits	Total Circuits
100 Acre Wood	134	0	76	2	432	210	642
A test building	2	0	0	0	10	2	12
A test building 2	1	0	0	0	11	1	12

In this example above building 100 Acre Wood has 134 non-compliant circuits with 0 planned for testing. This is not an ideal situation; the 134 circuits require a planned test date. To set the planned dates, the **Modify Plan** function needs to be selected.

6 Difference between next test and planned test

Care should be taken when interpreting the next test date for a building or board. The section below describes how EDIS handles the next test date for a building and board.

The EDIS compliance dates are defined using the oldest date for the circuit. So the oldest next test date or planned date for a circuit is used as the next test and planned test date for the board. The oldest next test date and planned test date for a board is used to define the next test date and planned test date for a building.



7 Modifying the plan

The screenshot below shows the key features of the **Modify Plan** screen:

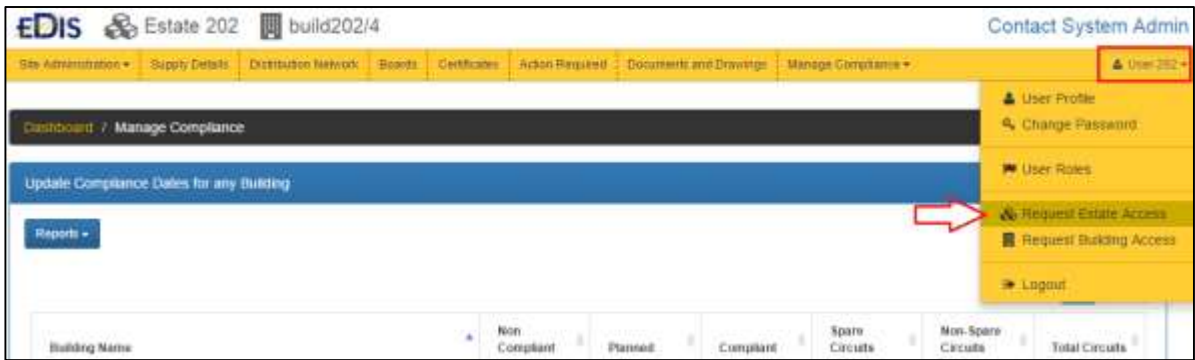
1. The search or filter can be applied to the circuits using a range of conditions, e.g. Section equals “West Riser”
2. The planned dates can be ‘bulk updated’; the update will apply to the circuits that are currently listed. If a search is done, the updates will apply to the circuits returned by the search. For example, if the user searches on ‘Section = West Riser’, then applies a bulk update, the updates will be applied to the circuits in the West Riser.
3. Individual circuits can be updated directly by selecting the circuit or board
4. The plan can be downloaded using the excel download feature

Board Ref	Ref Type	Phase	Section	Floor	Circuit	Description	Last Test Date		Next Test Date		Planned Test Date	
							Board	Circuit	Board	Circuit	Board	Circuit
1	B/BAR	3					20/06/2015		22/07/2015			3.
1.2	DB	1							18/07/2013			
1.3	DB	1							18/07/2013			07/08/2015
1.3.1	DB	1							18/07/2013			
1.3.2	DB	1							18/07/2013			
202/2Sing1	DB	1	section	floor					18/07/2013			
6.41	DB	3	south side	I			01/06/2015		18/07/2013			07/08/2015
AA1	DIMM	3	north	LG					18/07/2013			07/08/2015

8 Approach to creating a plan

9 Appendix: Requesting Building Administrator rights for an estate

1. Login www.electricalcertificates.co.uk
2. Go to your personal menu options
3. Select Request Estate Access



4. For the Estate select the action: Building Admin, and email will be sent to the buildings' administrators and they will approve or deny building administrator permissions