

Guidance Manual

Contents

Electrotechnical Assessment Specification (EAS)	3
Introduction to eCOMS	4
Training Records	4
Documents	4
Observations	4
Reporting	5
Walk-through and navigation	6
eCOMS dashboard	7
Adding a new training record, document, observation and role history to an Operative	8
Training record types	9
Adding training records to multiple Operatives	12
Adding a new training record, documents and observations to the Enterprise	13
Adding an Observation to a company document	14
Adding a business unit	14
Adding a new operative	17
Job roles	19
Training course categories	21
Training matrix export	23
Alert settings	25
Action alerts	26
Mobile devices	26
Help, bugs and guidance	27
Appendix 1 – Tables 1-4 of Appendix 10	28

Electrotechnical Assessment Specification (EAS)

On 1 September 2020 a new EAS document came into effect. The EAS document is the framework around which Certification Bodies assess Electrotechnical Enterprises.

EAS 2020 introduced new requirements around competence of personal in an Enterprise and required, as per clause 11.1, the Enterprises employ persons who are competent and/or adequately supervised for the work they do.

11. PERSONNEL

11.1 The *Enterprise* shall be required to employ persons to carry out *Electrotechnical work* who are competent and/or adequately supervised to ensure safety during and on completion of the work.

Figure 1 Clause 11.1 of EAS 2020

Appendix 10 of EAS 2020 introduced guidance on how an Enterprise may conform with this requirement, setting out a staged approach, as listed below:

- 1. Identify the level (1, 2 or 3) of operative appointed to carry out the work in Table 1;
- 2. Identify the degree of risk (low, medium or high) based on Table 2 and/or more detailed knowledge of the work to be carried out.
- 3. Cross reference items 1 and 2 on Table 3 and identify the colour code in the matrix (green, amber or red);
- 4. Use Table 4 to identify based on the colour code from Table 3 what would be deemed satisfactory in terms of (a) how the operative is instructed, (b) the competence of the person inspecting and testing the work and (c) the involvement of the QS on site.

This approach refers the reader to Tables 1-4 in Appendix 10 of EAS 2020, reproduced in <u>Appendix 1</u> of this document for clarity.

This information and subsequent documentation will be reviewed during your technical assessment.

Whilst Enterprises are at liberty to make their own system for ensuring competence of Employed Personnel, ECA has created an electronic system for recording competence and undertaking observations of operatives, in line with EAS 2020. This system is called eCOMS.

EAS 2020 is available to download and read here.

Introduction to eCOMS

eCOMS is a web-based tool developed by ECA which provides Members with an easy to use solution to maintain accurate operative training records. Specifically, it assists Enterprises to meet EAS 2020 requirements by providing documentation and training history logs. In addition, it maintains a detailed history about operatives as they change roles within the organisation and when they join and leave employment.

Most importantly eCOMS means users can quickly visualise the three EAS metrics for all current operatives and, using a simple traffic light colour scheme, what level of supervision is required for each of them.

Training Records

To help demonstrate compliance to EAS 2020, eCOMS gives Enterprises a simple way to maintain training records for each operative. Different types of training can be selected such as formal qualifications or CPD, as well as in-house training courses such as site inductions. These can be added either to an individual record or by selecting multiple employees.

Documents

To maintain clear evidence that operatives are experienced and have the required competence, be this electrical or health and safety based, eCOMS allows Enterprises to upload documents against the appropriate records being maintained. A document can be added against:

- An Enterprise to maintain records of items such as corporate structure or health and safety statements.
- An operative to store a general record such as a CV.
- An operative's training record this is where most documents would be uploaded to prove that they hold a given qualification, such as a copy of the certificate.

Observations

EAS 2020 not only requires an up-to-date record of operative competence, it states that Enterprises must maintain records of periodic reviews of documentation and training. eCOMS provides a flexible solution to record observations and add in follow-up dates to prompt when a review is due.

Recording of observations can be added to:

- An operative to make a general observation not linked to a particular document or training record.
- An operative's training record to make a general observation about the operative's training and to perhaps record that a follow-up is needed.
- Documents (company, operative or training record) to log that the document was
 observed and when it may require further observation e.g. a health and safety
 statement.

It is not a requirement of EAS 2020, nor would it be practical, to record observations against every operative, document or entry within eCOMS. However, this tool's flexible approach means Enterprises can decide for themselves.

Reporting

In addition to the operative lists, eCOMS allows Enterprises to quickly see how their workforce fits within the metrics of EAS 2020. The EAS buttons on the operatives' list screen, and the individual operative details screen, shows a diagram of the operative data overlaid on the EAS tables given in Appendix 10 of EAS 2020.

All data in eCOMS is sortable and searchable and can be exported to Excel. This means Enterprises can report on and quickly view current operatives, documents and training records which can then be used by the business and help to prove compliance during a technical assessment.

Walk-through and navigation

Member registration for eCOMS is via the ECA website <u>www.eca.co.uk</u>.

Any ECA Member with a web account can access eCOMS. If you don't have an account, then you can create one via the MyECA link on the ECA website. The Nominated Rep will then need to approve access.

Please enter your ECA website login credentials	The Dectrotechnical Assessment Specification (EAS) is the document to which Certification Bodies assess alectrical contractors. The 2000 update to the EAS introduced a requirement for Enterprises to end that Employed Persons are competent to understate Electrotechnical work and to make records of this available to the Certification Body.
Enal some assompsny@exa as JA Passed 	eCOMS is free to ECA Members, violt the ECA website [<u>sources.could</u>] for more on membership benefits.
Not an eCOMS user? Find out more here (<u>inveneeu.co.uk/eCOMS</u>)	

Figure 2 eCOMS log-in screen

Once logged in, eCOMS will retrieve the Member details from ECA and pre-populate relevant data.

On every login eCOMS will check the Member data held and will ensure eCOMS is kept up to date. If Member details need updating this can be done by contacting ECA's Member Services team at membership@eca.co.uk

The top menu

To navigate through the eCOMS screens there is a simple horizontal menu that will be present on all screens. Users can return to the dashboard screen at any time by clicking the company name, see Figure 3 eCOMS top menu bar.



Figure 3 eCOMS top menu bar

eCOMS dashboard

Once logged in, the eCOMS dashboard will be displayed, as shown in Figure 4 eCOMS dashboard.

ishboard								
🕼 Company	y Details							Edn 🗭 🕐
aining Contact Name			Contact Email			Contact Phone		
John Doe		۲	test.company4@eca.co.uk		•	089111111		۲
mpany Name			Member/Reference Number					
Test Company 4			123456789					
Idress Line 1			Address Line 2			Address Line 3		
28 South Park						Ballina		
			County			Postcode		
wn.								
evenoaks	Operatives		Kent			TN13 1DU	Add New 🏵	Menage Q EAS & 🔊
wn Sevenoaks Current C	Operatives Reference Nos 11	Job Title 1⊥	Kent Work Risk 11	Job Level 11	Supervision 11	TN13 IDU Started On 11	Add New ③	Manage Q EAS § 🕑
wn ievenoaks Current C e 11 Test	Dperatives Reference Nos 11 1224	Job Title 11 Qualified Supervisor	Kent Work Risk 11 Medium	Job Level 11 Level 3	Supervision 11 Low	TH13 100 Started On 11 04/03/2021	Add New Observation Date	Manage Q. EAS & Ø
evenoaals Current C e 11 Test	Dperatives Reference Nos 11 1234	Job Title TL Qualified Supervicor	Kent Work Risk 11 Medium	Job Level 1] Level 3	Supervision 11 Low	Tivit3 100 Started On 11 04/03/2621	Add tase (*) Observation Date (*)	Ver I
m evenoalis Current C e 11 Test	Dperatives Reference Nos 11 1234 bservations	Job Tille 11 Qualified Supervisor	Kent Work Risk 11 Medium	Job Level 1] Level 3	Supervision 11 Low	Tivi 3 100 Started On 11 04/03/2021	Add New 🛞 Observation Date 🁔	Manage Q. EAS Q. (D)
	Dperatives Retence Nos 11 1234 bservations Type 11	Job Title 11 Qualified Supervisor Observer 11	Kert Work Risk 11 Medium Date Observed 11	Job Level 1] Level 3 Followap 1]	Supervision 11 Low Information 11	Thr13 100 Stanted On 11 04/03/2021 Notes 11	Add there (*) Observation Date (*) Add Correctly Obs	Manage Q EAS § () Ver I Manage Q ()

Figure 4 eCOMS dashboard

The dashboard screen is the start of the user's journey in the system. You can return here at any time.

The dashboard shows several panels, each displaying the most recent and relevant data that has been recorded in the system. The panels are titled:

- Company details
- Current operatives
- Recent observations
- Recent documents

Each panel is collapsible and expandable. The user can perform some actions directly on this screen, such as adding a new operative, or navigate to the more detailed lists by clicking the **Manage** button on the relevant panel.



Adding a new training record, document, observation and role history to an Operative

Once an operative has been created eCOMS allows for several elements to be added to that operative.

- Training records a training record can be added to the operative showing they have undertaken some training. This could be a short induction or a company course.
- Documents a document can be added to the operative. This could be a CV or evidence of prior competence.
- Observations observations are a critical part of EAS 2020. An observation shows that someone has observed this operative in some manner and has made a comment on their work, function or role.
- Role history this allows the user of eCOMS to alter the role of the operative and see where events occur. Should an operative gain further training they may move up a job level. This would be noted here.

The process for each of these is similar and uses the green bars highlighted at the bottom of Figure 8. Simply select the option required on the green bar and follow the on-screen instructions i.e. if the user is adding a new document to an Operative, select **Documents** then press the **Add New** button.

When new information is added to an operative, these will be available in the operative screen under the relevant section.

Training Records		Documents		Observations		Role History		
1 Operative Documents	Add New Document					Include Expired?	Q Search All	Export 👔
Type 11	Document Type	Original Filename	Created On 1	Expires On 1	Review Due On 1	Observations 1		
Operative	Other	Blank.pdf	09/03/2021			0		View

Figure 9 Operative screen showing documents added to that operative

Additional observations and comments can be added against training records by selecting the **View** button shown on the right-hand side of Figure 9.

Document Details					Preview Q Download 🗟 Edit 🗭
Document Type				Additional Information	
Other		•	۲	Test	0
Creation Date				Expiry Date	
09/03/2021			۲		۲
Review Date				Original File Name	
			۲	Blank.pdf	
			Observ	ations	
0 Observations	1				
	1				U Search All

Figure 10 Adding an observation to a document for an Operative

Training record types

eCOMS recognises 2 types of training:

- Company training
- Training records

Company training is in-house training or CPD. This is accessed either via the Operative screen or by selecting **Company Training** from the **Training Records** tab on the top menu bar. This allows the user to input a company training type and assign it to an operative, as Figure 11

dd New Training Record to	1		(? ×
Training Type			Add New Company Training Type/Course	• 🕀
Notes for this Operative			•	(3)
B I <u>U</u> ⊕ ୭୭ ቀ⊳ ¦≣ ≔				0
Achieved On Select date				0
	Cancel 🗙	Save & Upload Document 🚹	Save Without Document	6

Figure 11 Adding a new training record showing company training

Training records for operatives are specific qualifications for the operative, usually undertaken externally. This is accessed from the top menu by selecting **Training Records** and **Operative Training**, see Figure 12. Once selected, the list of operatives will appear. Select the operative that requires a training record adding to their file.

COMS	🐼 Test Company 4 📲 Operatives -	🗢 Training Records 👻 💷 Docum	ents
🐵 Dashboard / 🚢	Operatives / 👗 Test User / 🗮 Testing Tr	Operative Training	
		Company Training Courses	
😭 Training	g Record for Test User		

Figure 12 Accessing training records

Once an operative is selected, training records can be added to their file. This is done by adding a new document, shown on the bottom of Figure 13.

						Edit	ഭി
		Training Type					
		Testing Training			• ①		
		Notes for this Operative					
		Achieved On					
		16/03/2021			0		
							-
	Di	ocuments			Observations		
0 Documents Add 🗈					Include Expired?	Q. Search All Export	0
							_
	Created On 11	Review Due 11	Expires On	Original Filename 1	Observations †1		
Type †↓							
Type †↓							
fype †↓							

Figure 13 Training records for an operative

When selected, the user must pick from specific document types relating to this operative's qualifications and training. An accompanying file must be added as per Figure 14.

When created, observations can be added against any operative's training record.

ocument Type	Additional Information	_
18th edition qualification Apprentice Completion Diploma	O Expiry Date	0
Inspection & Testing NVQ3 Other	Original File Name	
Accepted File Types + Choose File		
	Drop Your Files Here	

Figure 14 Example training records for an Operative

Adding training records to multiple Operatives

In the Operatives screen, the user can add training records to multiple Operatives by manually selecting the tick boxes on the left-hand side as per Figure 15, or by selecting the **All Operatives** tick box at the top of the screen.

2 Operativ	es (2 Selected) Add Trainin	g Records to 2 Operatives	ives 🔟	
~	Name 1	Reference Nos ↑↓	Job Title ↑↓	Work Risk ↑↓ ႃ
~	Additional, User			Medium
Z	User, Test	1234		Medium

Figure 15 Adding training records to multiple operatives

Adding a new training record, documents and observations to the Enterprise

Training records, documents and observations can also be added to the enterprise. This gives the user the option to create generic information that can be applied across the Enterprise.

The process for this is much the same as adding individual details. You can do this by selecting the top menu bar as per Figure 3.

Select the relevant option ie. Training record, document or observation, and click to add the Company version. This will open a new screen, much like in Figure 16 for creating a new company document.

Simply fill in the details, including a file if required, and select **Save**.

Add Company Document		(?) ⊗
Document Type	Additional Information	
Creation Date	Expiry Date	<u>v</u>
Select date	0	(?)
Review Date	Original File Name	
Accepted File Types + Choose File		
	Drop Your Files Here	
	Cano	el 🗙 Save 🗟

Figure 16 Adding a company document

Adding an Observation to a company document

As with all documents within eCOMS, you can add an observation to a company document, such as a health and safety policy or an organisation chart.

From the top menu bar select the **Documents** section and **Company Documents**. Select the document you wish to add an observation on to and a new screen will appear as shown in Figure 17. You can then enter the observation details.

						Preview Q Download 💩 D	it 🛃
Document Type				Additional Information			
Health and Safety Policy			• 🕲	test			۲
Creation Date				Expiry Date			
03/02/2021			•				•
Review Date				Original File Name			
18/06/2021			eComs_log01.jpg				
			Obser	vations			
0 Observations Add						Q Search All Exp	að
Observer 1	Date Observed 1	Followup 11	Type 1	Information 11	Notes 11		

Figure 17 Adding an observation to a company document

Adding a business unit

The business unit segregation allows users to assign a business unit to their operatives.

Business Unit setup is done from the new company settings page. From the top menu navigation, click the **Login Email** button in the right corner. Under the login email, there is a new option called **Settings**.

🛋 Documents ~ 💿 Observations ~ 😨 Help ~	ECA STAFF 🗸 🗳 🦉
	Action Alerts
	▲ Supervision Alerts
	🏚 Settings
🖺 Job Roles	My Business Units
Q Sear	ch All E [→ Log Out



The settings have three functionalities:

- Alert Settings
- Job Roles
- By Business Units

The user should click on the **My Business Units** button and then the **Add +** button to set up their business unit and save.

Alert Settings	📑 Job Roles	_	My Business Units
	Add New Business Unit	⊘ ⊗	
S Add	Name		Q Search All
		0	
	Description		Edit
		O	
	Ca	ncel X Save 🗊	cuit :
			Edit

Figure 19 Adding a new business unit

Once the unit is added, on the right-hand side, next to the Business Unit Description, there are three options.

- Edit
- Remove
- Assign

Alert Settings	🔓 Job Roles	My Business Units
5 Business Units Add ()		Q Search All Export D 🕥
Business Unit Name $\uparrow\downarrow$	Business Unit Description $\uparrow\downarrow$	
Bon Electrical	Demo	Edit
ECA Technical		Edit
Rotherwick House	ECA Head Office	Edit :

Figure 20 Buttons to edit, remove and assign items

To change the existing business unit name against the record, click on the Edit button and save the changes made.

Edit Existing Business Unit - Bon Electrical	? ×
Name	
Bon Electrical	0
Description	
Demo	3
Cance	I X Save 🕄

Figure 21 Altering existing business unit

A user can only **Remove** Business unit names if they have not been used. Business units that are currently being used or that have been used cannot be deleted to ensure we maintain historical auditable information.

Business Unit In Use	(\times)
This business unit has been used against an operative record (current or past engagement) and therefore cannot be deleted.	
	Close X

Figure 22 Business unit cannot be deleted

The **Assign** button allows users to assign multiple operatives at the same time. The assign brings up the screen of all the operatives for users to tick the boxes of operatives they want to assign and save.

As	sign Bus	iness Unit - Sev	enoaks Office	? ↔
		First Name	Last Name ↑↓	Current Business Unit $\uparrow\downarrow$
		Ryan	Airey	
		Sam	Junior	Sevenoaks Office
		Tess	Tickler	Software Development
		Test	B demo	Bon Electrical
		Test	Name	1
		Test 3	Person	
		Tyler	Andrews	ļ
				Cancel X Save 🕄

Figure 23 Assigning business unit to operatives

After the operative list selected is assigned, the user can view the details added within the business unit column by using the **Our Operatives** button in the top menu navigation. The operative list is now scrollable rather than paged.

©C0M	S 🛛 Electrica	al Contractors Te	st Account 🛛 😤 Ope	r ratives 🗸 🎓 Tra	ining Records ~	Documents	✓	vations 🗸 💿 He	lp ~			ECA STAFF 🗸	<u> </u>
Ø Dashboard	> 😤 Electrical	Contractors Test A	ccount - Opera	r Operatives									
* 0	peratives		_+ Ad _+ Up	d New Operative								eas Ø 💿	
23 Ope	ratives	d New Operative 🗲	2			Show Operat All History	As of:	18/09/2024	Qs	earch All	Export 🖻	Training Matrix 🗷	٥
	First Name ↑↓	Last Name ↑↓	Business Unit ↑↓	Operative Type ↑↓	Job Role 1↓	Work Risk 1↓ 17	Job Level 1↓ ▽	Supervision ↑↓ ⑦	Start Date ↑↓	Observation Due ↑↓	Total CPD Hours ↑↓		*
	Sam	Junior	Sevenoaks Office	Non Electrical	Testing	Non- electrical	Level 0		18/09/2024		11	View	
	Tess	Tickler	Software Development	Non Electrical	Manager	Non- electrical	Level 0		13/09/2024	25/09/2024	0	View	
	Test	B demo	Bon Electrical	High Voltage	Authorised Person	Low	Level 1	Medium	17/09/2024		12	View	
	Test	Name		Low Voltage	Electrical Apprentice	Low	Level 1	2	25/02/2024		0	View	

Figure 24 Viewing details added within the business unit column

Adding a new operative

One of the first actions a new user to eCOMS is likely to do is add a new operative. This can be done in multiple ways, from the top menu using the **Add New Operatives** button or from the dashboard. Scroll down to the Current Operatives panel and click on the **Add New +** button in the right corner.

COMS @ Electrical Contractors Test Account	🛬 Operatives 🗸 🎓 Training Records 🗸
🤣 Dashboard 💙 😤 Electrical Contractors Test Account - Opera	🚉 Our Operatives
🔄 Operatives	+ Add New Operative
	+ Upload New Operatives

Figure 25 Add new operative from the dashboard

The user then inputs details of the operative. A 'Job Role' is specified which will automatically assume a 'Job Level' (a level of competence).

The 'Degree of Risk' of the current work is then specified.

These specifications are taken from EAS 2020. Additional help is available for the user by clicking the symbol. This is true of all sections of eCOMS.

user can alter the 'Job Level' of the operative if the pre-defined status is not appropriate.

The

-	First Name		Middle Initials	Last Name	
	Test	3	User	Image: Book of the second seco	0
No Image Available	Reference/Card Num	bers	Phone Number	Email Address	
	2345	0	07483060497 3	user.demo@.co.ul	k 💿
Business Unit	~ (?)	Operative Type	~	Job Role	~ ?
Business Unit Select a Value	 ✓ (9) 	Operative Type High Voltage	~	Job Role Jub Role Authorised Person	√ (9
Business Unit Select a Value Bon Electrical ECA Technical	~ 3	Operative Type High Voltage Degree of Risk	in the Electrotechnical Wo	O Authorised Person	~ 3
Business Unit Select a Value Bon Electrical ECA Technical Rotherwick House	• ③	Operative Type High Voltage Degree of Risk Low - (Workin	in the Electrotechnical Wo	Job Role Authorised Person	~ 0 ~ 0
Business Unit Select a Value Bon Electrical ECA Technical Rotherwick House Start Date	✓ (3)(3)	Operative Type High Voltage Degree of Risk Low - (Workin End Date	in the Electrotechnical Wo	Job Role Authorised Person rk Employment Status	⑦
Business Unit Select a Value Bon Electrical ECA Technical Rotherwick House Start Date 17/09/2024	• ③	Operative Type High Voltage Degree of Risk Low - (Workin End Date Select date	in the Electrotechnical Wo	Job Role Authorised Person rk Employment Status Full-time	 • •<

The new operative can be added to the list of business units already created.

Figure 26 Adding a new operative

The operative will then appear on the dashboard, see Figure 27. The new operative is displayed on the dashboard.

👱 Curr	rent Opera	atives							Add	New 🕀 🛛 Manage Q	EAS 🖗 🕐 🗸
First Name ↑↓	Last Name ↑↓	Business Unit ↑↓	Operative Type $\uparrow\downarrow$	Job Role ↑↓	Work Risk 1↓	Job Level	Supervision ↑↓	Start Date	Observation Due Î↓	Total CPD Hours ↑↓	
Tess	Tickler	Sortware Development	Non Electrical	Manager	Non-electrical	Level 0		13/09/2024	25/09/2024	0	View
Test	B demo	Bon Electrical	High Voltage	Authorised Person	Low	Level 1	Medium	17/09/2024		0	View

Figure 27 Showing the new operative displayed on the dashboard

After the new operative has been created, the user can then see their details using the **View** button on the right-hand side.

This opens the Operative screen showing the details entered as per Figure 28. From here, the eCOMS user can add details for the operative, these include:

- Training records
- Documents
- Observations
- Role history

These tabs are available at the bottom of the screen.

first Name		Middle Initials			
		Windure Initials	Last Nan	ne	
Test		User	B demo	D.	
Reference/Card Numbers		Phone Number	Email Ad	Idress	
2345		D 07483060497	user.de	imo@eca.co.uk	
Risk - Written Instruction / Periodic C	Oper	it on Site		Job Role	dd 🕘 Edit 🖉 Risk 💈 🗸
	Dom	n vocage	0		v 6
person: Apprentice, improver etc) 💦 🗸 🗸	1 Lo	v - (Working on an isolated system)			~ C
	End	Date		Employment Status	
	•		•	Full-time	~ @
aining Records		Documents	Observation	ons	Role History
	teference/Card Numbers 2345 Risk - Written Instruction / Periodic C	eference/Card Numbers 2345 Risk - Written Instruction / Periodic QS Involvement Period: QS Involvement person: Apprentice, Improver etc) Core End C	Interference/Card Numbers Phone Number 2345 Image: Control of Card States and Card Stat	Interference/Card Numbers Phone Number Email Add 2345 Image: Card Number of the State of t	Interference/Card Number Phone Number Email Address 2345 Image: Control of Card Number User: demogleca.co.uk Reserved to a state of Card Number Reserved to a state of Card Number Operative Type Job Role Authorsed Person Operative Type Degree of Risk In the Electrotechnical Work person: Apprentice, Improver etc) Image: Colspan="2">End Date Employment Status Colspan="2">Publishme

Figure 28 Operating screen showing options for training records etc. at the bottom

Job roles

Enterprises can now define their non-electrical job roles such as design engineer, Asset management engineer and assign to operatives from the new company setting page.

From the top menu navigation, click the **Login Email** button in the right corner and select the new option called **Settings**. There is a job roles section, click on the **Job Roles** button and then the **Add New Job Role** button to set up and save.

OMS @ Electrica	al Contractors Test Account 🛛 🛓 Operatives 🗸	🞓 Training Records 🗸 🏥 Documents 🗸 🥥	Observations 🗸 😰 Help 🗸		ECA STAFF 🗸
nboard 💙 🖷 Business U	inits				Action Alerts
Company Setti	ngs				▲ Supervision Alerts
	Alert Settings	Job Roles		📔 My Business Units	🏚 Settings
Job Roles Add	New Job Role				兼 Log a Problem → Log Out
Job Role 1↓	Add new Company Job Role for Non	electrician	⑦		
Administrator	Job Role		Default	Vi	ew
Data Professional	rearing		Default	vi	ew Remove
H&S Professional			Cancel X Save Default	v	ew :

Figure 29 Adding new job roles for non-electrical staff

To edit an existing job role, click on the **View** button and save. The changes made can be seen within the Job Role column using the **Our Operatives** button.

Job roles that have been assigned to an operative cannot be removed for audit reasons.

After the new job role is added, the user can then see the new role by going to the operative's section and clicking the **View** button on the right-hand side.

Within the operative current role, click on the **Edit button**. Select non-electrical for operative type, to see a list of job roles for non-electrical to choose from.

Current Role			Save 🕄 Cancel × 🗸
Please note that you are editing the current operative engagement. If the operative is changing to a new role or job, you should cancel y	This will overwrite the operatives information for the selected perf our changes and create a New engagement for the new period of	od. work	
Business Unit	Operative Type	Job Role for Non electrica	al
Sevenoaks Office X V	Non Electrical	✓ ⑦ Testing	 ✓ ③
Job Level	Degree of Risk in the Electrotechnical Work	H&S Professional	•
Level 0 (Non-electrical staff)	Non-electrical - (Non-electrical)	Manager	3
Start Date	End Date	Mechanical Professional	
18/09/2024	Select date	(7) Operations	0
		Testing	•

Figure 30 The new job role displayed for non-electrical operative

In the role history, the user will see the changes saved for the operative type and job role.

	Training Records		Documents		Observations		Role History
1 Roles	Add New Role					Q Search A	II Export 😥
From 1↓	то ↑↓	Business Unit $\uparrow \downarrow$	Operative Type $\uparrow \downarrow$	Job Role ↑↓	Work Risk $\uparrow\downarrow$	Job Level ↑↓	Supervision ↑↓
18/09/2024		Sevenoaks Office	Non Electrical	Testing	Non-electrical	Level 0	View

Figure 31 Operative role history

Training course categories

This is to apply high-level categories to training courses by the enterprise. Under **Training records**, in the top menu, the user can click on the company Training Courses, where they will see a list of training courses already set up.

COMS CIEctrical Contractors Test Account	🛬 Operatives 🗸	중 Training Records ∨	🚮 Documents 🗸 💿 Observations 🗸 🔞 Help 🗸	myecastaff	login@eca.co.uk 🗸 🔎
Dashboard > III Training Courses		🎓 Operative Training			
 Training Courses		III Training Courses			3
7 Training Courses Add ①				Q Search All	Export 🖹
Course Name $\uparrow\downarrow$	Course Descript	ion ↑↓	Course Category ↑↓	Held On 1↓ Valid To 1	11
Company Induction	Training for all n	ew starters	Administrative	04/02/2021	View
CPR Training			Health, safety & environmental	17/09/2024	View
Defensive Driving	Learn to drive sa	ifely		22/04/2024 30/04/202	24 View E
Learning to suck eggs	Teaching some	one the best method for egg su	icking Health, safety & environmental		View

Figure 32 Training courses set up

The user can add a new training course by using the **Add +** button and choose from the category list. The user has the option to save with or without uploading a document.

Add New Training Course	?⊗
Category	
Electrotechnical	× ~ 💿
Name	
Electrical training	3
Description	
B I <u>U</u> ⊕ "	3
Held On	
30/09/2024	3
Valid To	
30/09/2025	0
Cancel X Save & Upload Document 🚹	Save Without Document 🕄

Figure 33 Adding a new training course

Course Name ↑↓	Course Description $\uparrow\downarrow$	Course Category ↑↓	Held On Î↓	Valid To $\uparrow\downarrow$	
Company Induction	Training for all new starters	Administrative	04/02/2021		View
CPR Training		Health, safety & environmental	17/09/2024		View :
Defensive Driving	Learn to drive safely		22/04/2024	30/04/2024	View
Electrical training		Electrotechnical	30/09/2024	30/09/2025	View

Figure 34 Training courses showing the course name added with the course category

After the training course is added, click on the **View** button. In the training records panel, add a new training record using the **Add New Training Record** button.

COMS @ Electrical Contractors Test Account	🛬 Operatives 🗸 🎓 Training Records 🗸	🚮 Documents 🗸 💿 Observations 🗸 😨	Help ~	<u>*********************************</u>
🕲 Dashboard 🔰 🛬 Operatives 🛸 🔔 Test User B demo	💒 Our Operatives			
Start Date 17/09/2024	2+ Add New Operative Date	0	Employment Status Full-time	 ✓ Ø
Training Records	Documents	 Observati 	lons	2 Role History
0 Training Records Add New Training Re	cord ④			Q Search All Export &
Achieved On ↑↓ Valid To ↑↓ Train	ing Course ↑↓	Description ↑↓	Category Name ↑↓	Observations 1 CPD Hours 1

Figure 35 Operative training record screen after clicking the view button

Select the new training course record from the drop-down list, enter the CPD hours and save.

ld New Training Record to Test B de	mo		?
Training Course			
Electrical training			~ ⊘
Notes for this Operative			
B I U ⊕ ୭୨ ቀ> Έ ⊞			0
Achieved On			
30/09/2024			0
Valid To			
30/09/2025			0
CPD Hours			
4			3
	Cancel X	Save with Certificate 👔	Save Without Certificate

Figure 36 An operative adding a new training record

The user will see that the new training course is added to their training record. The category is shown against the training courses. The category name can also be used for filtering or sorting all the operative's training records.

	Training Records		Documents	Observations		💄 Role Hist	ory
1 Training Re	cords (Total CF	PD Hours: 4)	Add New Training Record \textcircled{O}		Q s	earch All	Export 🗴
Achieved On 1↓	Valid To 1↓	Training Course	↑↓ Description ↑↓	Category Name ↑↓	Observations ↑↓	CPD Hours ↑↓	
30/09/2024	30/09/2025	Electrical trainin	1	Electrotechnical	0	4	View :

Figure 37 New training course added showing in the training record

Training matrix export

This feature allows users to export training matrix from eCOMS to use however they deem fit. The user clicks on the **Training Records** button and selects **Operative Training**, where they can see all their training list and the **Training Matrix** button in the top right corner next to the Export button.

COMS ⊚⊧	lectrical Contractors Test	Account 🛓 Operatives	s 🗸 🎓 Training	∣Records ∽ 📑 Docuπ	nents 🗸 🕢 Observations 🗸	🔋 Help 🗸			ECA STAFF 👻 🕹
🕽 Dashboard ≯ 😤 Op	eratives ≯ 🞓 Training	Records	🎓 Operat	ive Training					
🇰 Training	Records		🔝 Trainin	g Courses					0
30 Training F	Records					Q Search All		Export 🗷	Training Matrix 😒
Operative First Name Î↓	Operative Last Name ↑↓	Achieved On 1↓	Valid To ↑↓	Training Course ↑↓	Description $\uparrow\downarrow$	Category Name ↑↓	Observations ↑↓	CPD Hours ↑↓	
Darren	Jones	05/01/2022		Short electrical courses			0	0	View
Daz	Testtest	08/07/2021	11/08/2021	Site specific training			0	0	View :
Sam	Junior	18/09/2024	31/08/2025	Site specific training			0	5	View
Test	B demo	04/02/2021		Company Induction	To help employees adjust to the and become familiar with the organisation.	eir roles Administrative	0	2	View

Figure 38 Operative training records matrix

The training matrix has all current operative details as rows and training courses as columns. It has formatting applied to it, allowing eCOMS users to have a glance at what training has been done and what training operatives should attend with the expiry date.

On the exported formatted Excel sheet, training courses with expired dates have **Red** columns. If a training course is due in the next 30 days, the colour will change to **Yellow or Orange**. If a training course expiry date is due in the future or does not have an expiry date, the column will appear **Green**.

Training courses that do have an expiry date will show **No Expiry** in the training course column.

Company C Exported from E	Derative Trainin CA eCOMS on Wed Sep	g Matrix 18 2024			Expired	Due <30 Days	Due >30 Days						
Opeanatione	Beinesunt	OperativeType	ual ^{the}	· hopenicetin	Companinguesia	. QD	CAR Training	Defensive Draine	DenoTetine	Electical training	Greentechnolest -	health and safe with	inite induction
Craig Armstrong	Sevenoaks Office	Low Voltage	Electrical Apprentice										
CURTIS JONES	ECA Technical	Low Voltage	Electrician										
David Hubbard	Rotherwick House	High Voltage	Commissioning Engineer	No Expiry	No Expiry			30-04-2024			No Expiry		
fred williams	ECA Technical	Low Voltage	Electrical Labourer					18-09-2024					
Gemma Clarke	ECA Technical	Non Electrical	Manager										
james jones		Low Voltage	Electrician										
Julian Butler	ECA Technical	Non Electrical	Manager										
Kathryn Parsons		Non Electrical	Manager										
Lewis Allen		Low Voltage	Site supervisor (electrical)										
Mad Max	ECA Technical	Low Voltage	Electrical Apprentice					30-04-2024					
Mark Adams	ECA Technical	Low Voltage	Site supervisor (electrical)										
Megger 1721	ECA Technical	Non Electrical	Manager										
Melissa Butler		Non Electrical	Manager										
paul smith		Low Voltage	Registered Electrician										
paul williams		Non Electrical	Manager									No Expiry	
Peter Smith		Low Voltage	Electrician									02-05-2025	28-04-2024

Figure 39 Company operative training matrix export

Alert settings

Users can define the frequency at which they receive alerts from eCOMS and the recipients of the alerts.

Settings are adjusted from the new Company settings page, and the list of recipients is limited to eCOMS users for that enterprise.

By default, the alert frequency is ticked for all members. The company can reduce or disable the frequency by unticking the check boxes.

The alert frequency intervals are:

- 90 days before
- 60 days before
- 30 days before
- 14 days before
- On the day
- 14 days after

d 🔰 🕌 Company Settings				Action Alerts
npany Settings				A Supervision Al
Alert Setting	S	job Roles		🏚 Settings
				jinit Log a Problem
Alert Frequency				t 〔→ Log Out
Alert Frequency 90 days before	60 days before	30 days before 📄 14 days before 🛃	On the day 🛛 🜌	14 days after
Alert Recipients				Add Recipient Email +
Alert Recipient Emails				
Person Name 1↓		Email Address ↑↓		Action

Figure 40 Company alert settings options

The user can add recipients within their eCOMS environment who want to receive the alert using the **Add Recipient Email +** button.

Action alerts

Users can create a date in the future for review of documents, expiries or additional observations. These are optional but will, if not managed, result in an 'action alert' being created. Action alerts are shown on the top menu bar as a warning. See Figure 18. Clicking on this button opens the **Action Alert** screen. From here, all actions and follow ups can be viewed and actioned.



Figure 18 Action alerts

1 Action Alerts						Export 🔀
ype ↑↓ 🏹	Title †↓	Details ↑↓	Link ↑↓	Follow Up On $\uparrow \downarrow \ \bigtriangledown$	Туре ↑↓ ♡	
raining Record	Followup/s Due	A follow up is due for training record - Induction Operative - Mike T Smith	Induction	02/02/2021	Warning	Dismiss

Figure 41 Action Alerts details

Mobile devices

eCOMS is designed to be used primarily on a laptop or desktop, however eCOMS will work on mobile devices too. In order to facilitate a smaller screen the layout will be reduced but the functionality will remain.

Users of some devices will need to ensure that pop-ups are turned on in the settings menu of the phone to ensure full functionality is available. This will enable users to see images.

Help, bugs and guidance

Although designed as an intuitive and easy to use package, eCOMS provides numerous context sensitive help sections by clicking on the symbol at any point.

Additionally, guidance is also available in the top menu bar in the help section. Here an 'About this section' is available to help answer any questions the user has.

To report a system bug simply click your name on the user log-in screen, as shown on Figure 18, and select **Log a Problem**. A new screen will open where you can report the bug to ECA.

Appendix 1 – Tables 1-4 of Appendix 10

able 1 Level of Operative Appointed				
Operative Level	Guidance			
Level 1	Operatives would be <i>Instructed persons (electrically)</i> who would generally be apprentices, labourers, electrician's mates or electrical improvers – and who under the supervision of a <i>skilled</i> <i>person (electrically)</i> , could be able to install wiring systems. Others that fall within this category are career changers who may have training and/or qualifications but lack experience.			
Level 2	Operatives would be <i>Instructed persons (electrically)</i> who are experienced, trusted electrical installers who can carry out Electrotechnical work efficiently and in accordance with the current BS 7671 and Building Regulations/Standards and can therefore be expected mostly to work without the need of close and detailed supervision.			
Level 3 Operatives would be considered as <i>Skilled persons</i> (<i>electrically</i>) who possess provide theoretical and electrical engineering skills, experience and knowledge with adec supervisory experience comparable to that of QS.				

Table 2 Degree of Risk in the Electrotechnical Work covered by BS 7671

Installation Work Examples (Note: The <i>Enterprise</i> will be responsible for judging the degree of risk, this table is provided for Guidance)	Degree of Risk	
Electrical work where the installation is isolated when not under the control of the installer e.g. • First fix Electrotechnical work. • Second fix Electrotechnical work.	Low	
Electrical work defined as Minor Works in an unoccupied building – subject to safe isolation procedures documented and implemented	Low	
Electrical work defined as Minor Works in an occupied building – subject to safe isolation procedures documented and implemented	Medium	
All other Electrotechnical work whether or not it is subject to safe isolation procedures.	High	
Electrical work – Periodic Inspection and Testing	High	

Table 3 Risk Matrix

of Operative ed(from Table 1)	Level 1 Operative (instructed person: apprentice, improver, electrician's mate)			
	Level 2 Operative (instructed person: experienced, trusted)			
Level Appoint	Level 3 Operative (<i>skilled person:</i> equivalent to QS without role or qualification)			
	×2	Low Risk	Medium Risk	High Risk
	Γ	Degree of Risk in the Installation (from Table 2)		

Table 4 Degree of Supervision (based on the risk matrix in Table 3)

Risk	Nature of Instruction to Operative	Minimum required Competence of	Involvement of QS on site
	Verbal	Satisfying the definition	Remote
	Written	of a Skilled Person	Periodic
	Written (electrically)	Close and Detailed	

*It is recognised that the person responsible for carrying out the initial verification or periodic inspection, testing and certification of the installation may not be the registered QS. The person shall hold an appropriate qualification or be able to demonstrate equivalent competence.



www.eca.co.uk/ecoms