



Sterling Accreditation
setting the standard



Version 1.2

User Manual

CIBSE | **AIR**
CONDITIONING
INSPECTOR



October 2012

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Introduction – Software Overview

In 2008, due to the introduction of UK government legislation, there has been a requirement to inspect and report on the condition and efficiency of air conditioning systems. Initially all reports were created using word processing applications and issued to a client in PDF format. Since then, a number of changes have been made to regulate the report content and to enforce registration onto the Landmark central registers. Included in these regulations is the requirement for reports to be audited by an accreditation scheme to ensure accuracy and appropriate content.

Sterling Accreditation Limited has developed their own bespoke software (Sterling e-volve) in order to make the process of creating accurate, professional and compliant reports considerably easier for energy assessors.

Sterling e-volve incorporates many features to guide and help assessors through the report production process including: spell checking, live report validation, context-sensitive help, TM44 guidance, automatic counts on non sampled systems and automatic date entry, all of which have been designed to save time and eliminate the duplicate entries required in other similar software.

Assessors can get help and support at any stage during the installation and report production process by contacting their accreditation scheme. (Contact details are available in the Technical Support section)

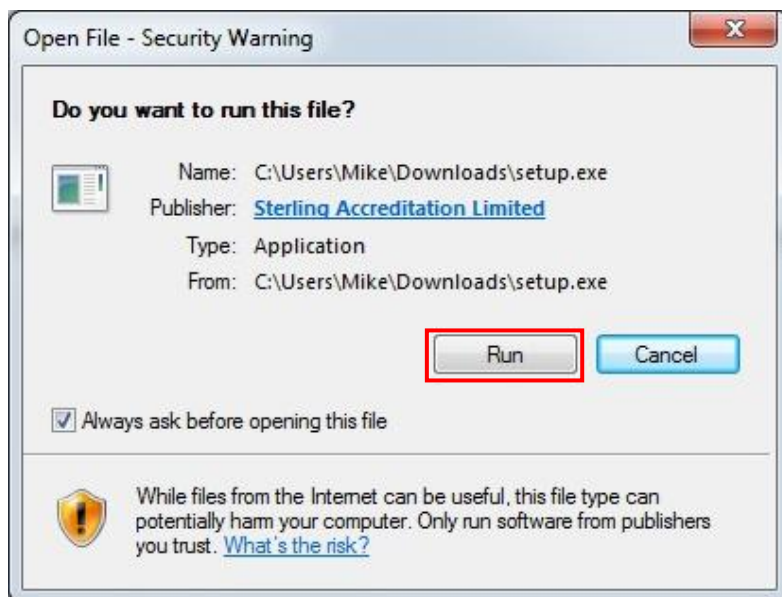
Minimum System Requirements

Windows Operating Systems ONLY

- Processor: 1 GHz or faster
- RAM: 512 MB or more
- Free Disk Space: 100 MB or more
- Operating System: Windows XP or later
- .Net Framework version 4 (Full version) – Can be installed during the installation process
- Windows Installer 3.1 or later
- Internet Explorer Browser
- Internet access (for installation & document generation)

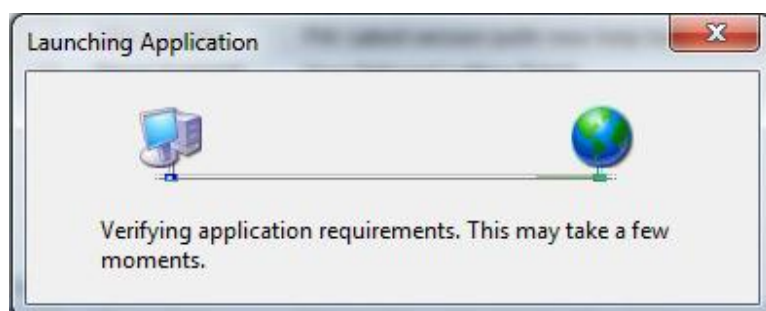


Installation



Once you have clicked on the link to install e-volve, the following screen will appear asking for you to approve the installation.

Click 'Run' to continue



As the software launches into the installation it will verify the requirements of your computer. Every time you run e-volve this screen will appear and check that the version you are running is the current version. If a newer version is available, you will be prompted

to update you installation to the latest version. Assessors should always accept the upgrade before moving to the report manager.



Once e-volve has verified your machine you will be able to proceed with the installation.

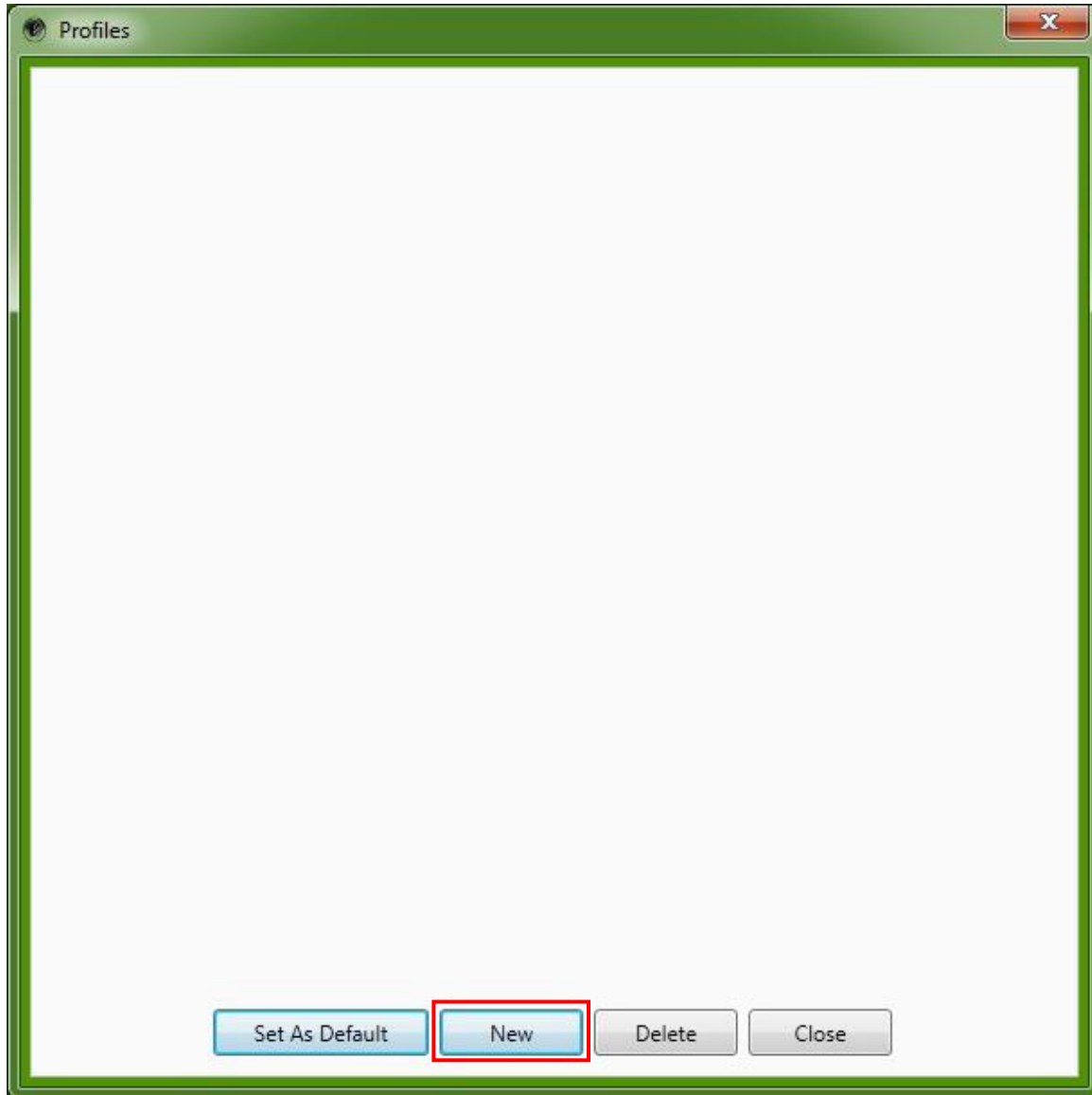
Click 'Install' to proceed.

The software will now automatically download and install.



Configuration – First Launch

Once you have installed e-volve, the software will automatically launch. Once open, the first task to complete is to create a 'default' Assessor Profile.

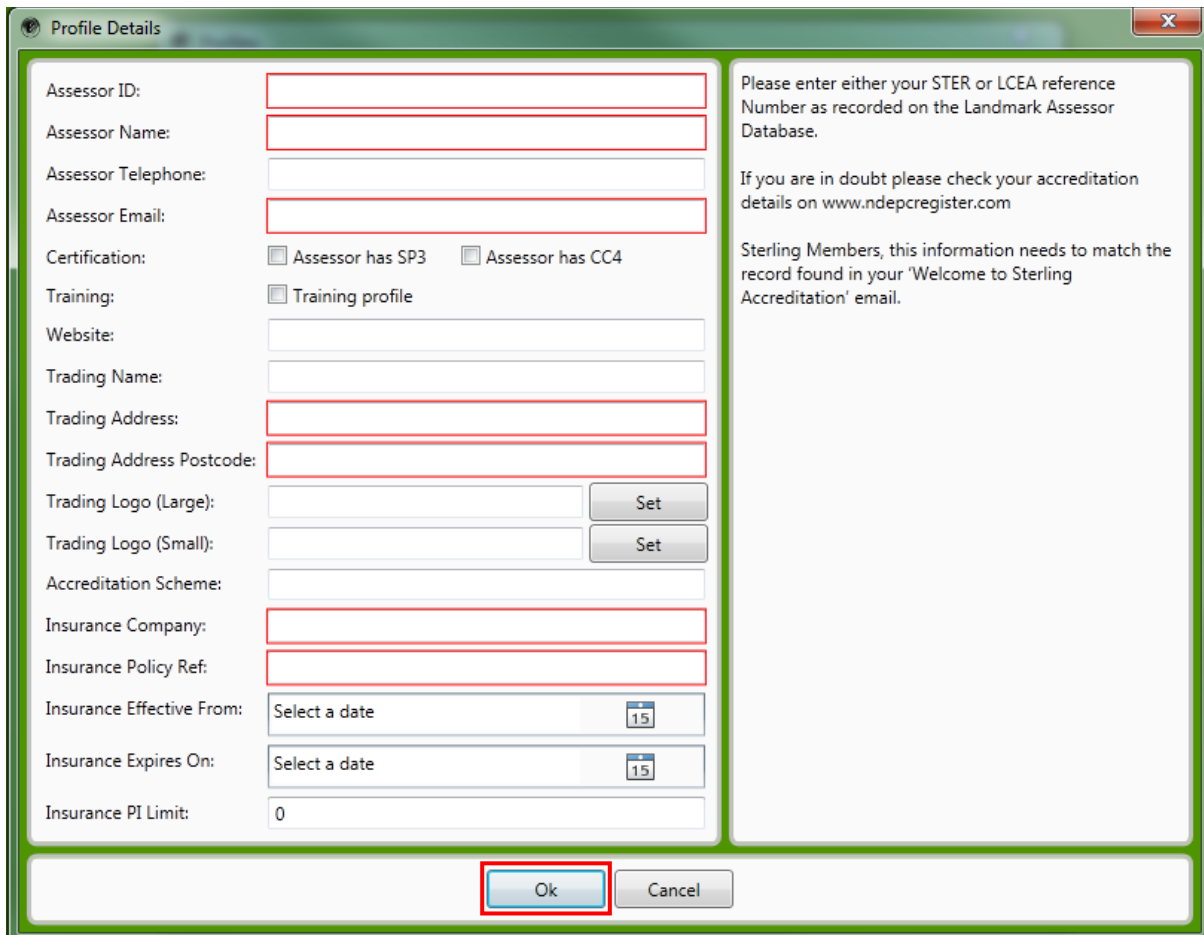


Click 'New' to proceed.



Creating a Profile

All of the details required to complete a profile, should have been confirmed to you by your accreditation scheme. For Sterling members these details can be found in your 'Welcome to Sterling Accreditation' email. If you need another copy, please email members@sterlingaccreditation.com and request a copy of your welcome email to be resent.



It is essential that the Profile details page is completed accurately. During lodgement, most accreditation schemes check your details, including Trading Name, Trading Address and all insurance details. Failure to get these details correct could result in the inability to create a report.

Assessor ID:	Please enter your Membership Number – i.e. STER or LCEA
Assessor Name:	Please enter your name as registered with your Accreditation Scheme
Assessor Telephone:	Optional: Enter your Telephone Number
Assessor Email:	Please enter your email address
Assessor has SP3:	Tick this box if you have AC Level 3 membership
Assessor has CC4:	Tick this box if you have AC Level 4 membership
Website: Optional:	If you have a website you can enter the URL into this field
Trading Name:	Please enter your Trading Name, Note: Sterling's lodgement system will stop if this doesn't match our Membership Records
Trading Address:	Please enter your trading address; Note: Sterling's lodgement system will stop if this doesn't match our Membership Records



Trading Address Postcode: Enter your registered business postcode
Trading Logo (Large): Required for Report Wrapper feature: COMING SOON
Trading Logo (Small): Required for Report Wrapper feature: COMING SOON
Accreditation Scheme: This will automatically default to your Accreditation Scheme
Insurance Company: Enter your insurance company name
Insurance Policy Ref: Enter your insurance Policy Number or Reference
Insurance Effective from: Enter the start date of your insurance cover
Insurance Valid Until: Enter the end date of your insurance cover
Insurance PI Limit: Enter your PI Value

Once all these details have been entered click 'OK' to save this profile.

If you have registered with your accreditation scheme more once you can create a profile for each Membership Number.

Profiles

Assessor ID: **STER999899 (Default)**
Email: mikegordon@sterlingaccreditation.com

Set As Default New Delete Close

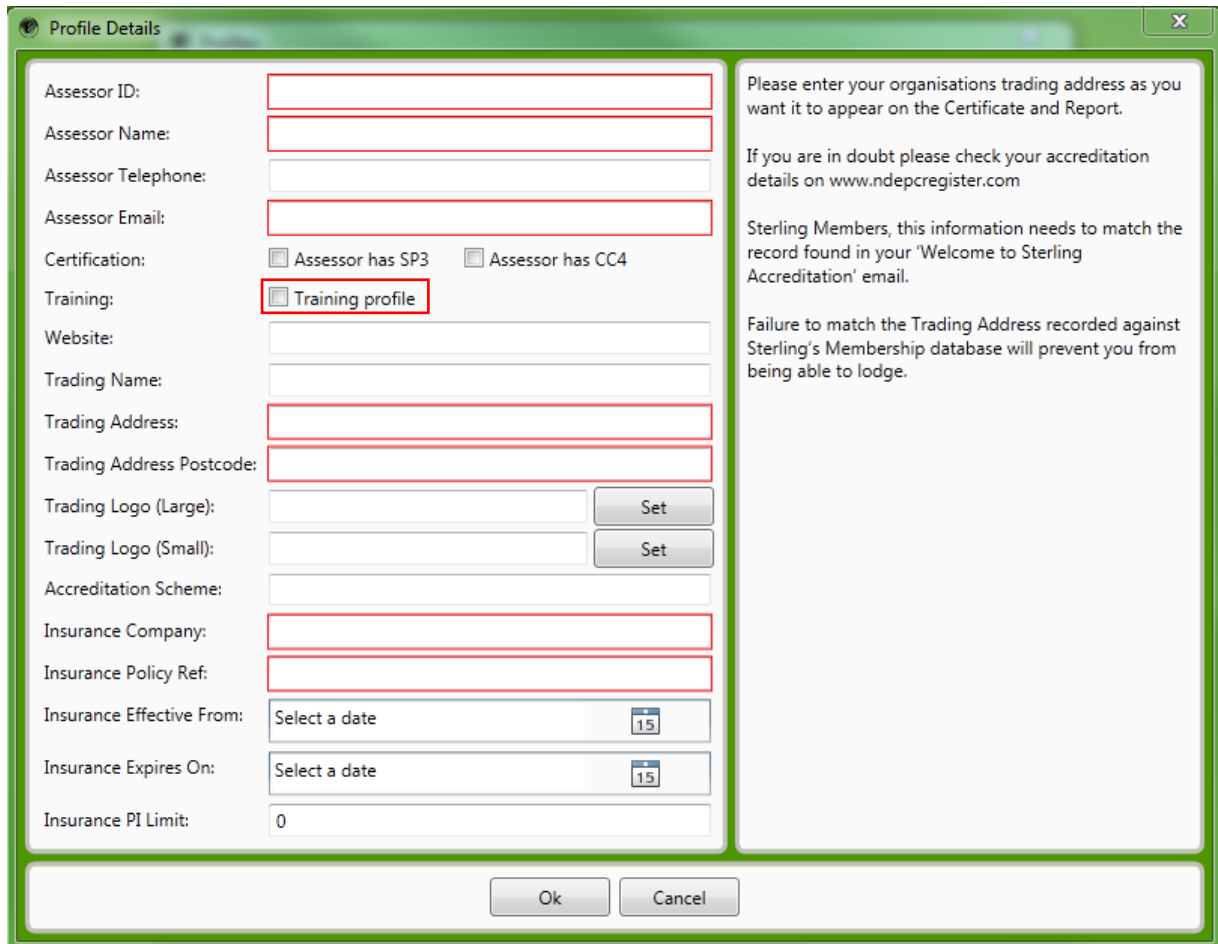
Your Assessor Profile is complete, Click 'Close' to continue.

If you need multiple profiles, click 'New' to create another profile.



Training Environment - Configuration

Sterling e-volve has the ability to create a dedicated Training Profile which allows Energy Assessors who are taking Qualification or APEL validation routes to create AC reports in a TEST Environment. The Training Profile should ONLY be selected by individuals who need to create reports for their portfolio or as part of a recognised training program.



The screenshot shows a 'Profile Details' window with the following fields and options:

- Assessor ID: [Text input]
- Assessor Name: [Text input]
- Assessor Telephone: [Text input]
- Assessor Email: [Text input]
- Certification: Assessor has SP3 Assessor has CC4
- Training: Training profile
- Website: [Text input]
- Trading Name: [Text input]
- Trading Address: [Text input]
- Trading Address Postcode: [Text input]
- Trading Logo (Large): [Text input] [Set]
- Trading Logo (Small): [Text input] [Set]
- Accreditation Scheme: [Text input]
- Insurance Company: [Text input]
- Insurance Policy Ref: [Text input]
- Insurance Effective From: [Date picker] [15]
- Insurance Expires On: [Date picker] [15]
- Insurance PI Limit: [Text input] 0

On the right side of the window, there is a text area with the following instructions:

Please enter your organisations trading address as you want it to appear on the Certificate and Report.

If you are in doubt please check your accreditation details on www.ndepregister.com

Sterling Members, this information needs to match the record found in your 'Welcome to Sterling Accreditation' email.

Failure to match the Trading Address recorded against Sterling's Membership database will prevent you from being able to lodge.

At the bottom of the window are 'Ok' and 'Cancel' buttons.

All Candidates that require a training profile should contact Sterling Accreditation to get the information required to create a Training Profile. You will receive an email confirming all the details needed to complete this profile screen. Note: You will need to select an appropriate level of qualification that reflects the training that you are completing.

Contact details for Sterling Accreditation can be found in the Technical Support section of this manual.



Sterling e-volve includes a TM44: 2012 search facility to enable you to review all of the guidance on completing Air Conditioning Inspections. Click on the TM44 button on the Top Menu Bar to launch the search facility shown below. Type your keyword into the search box and press enter or click search to display sections of TM44 that include your keyword. Clicking on each section in the

matching sections window will display the section of TM44 with your keyword highlighted.

You can switch between sections of TM44 by clicking on a different heading.

Relevant sections of TM44: 2012 have also been included in the Standard Help Text pane, to assist you answering a specific question in a report. If you would like to

Matching Sections

- 1.2 Purpose of this Technical Memorandum
- 1.3.1 Energy Performance of Buildings Directive
- 2.1.1 The inspection process - General issues
- 2.1.5 Sampling
- 2.1.8 Recognition of existing inspection and maintenance regime
- 2.2.1 Packaged cooling systems: simple procedure - Application
- 2.2.3 Inspection process for packaged cooling systems: general

purchase a copy of TM44 from CIBSE, please click on the 'Buy TM44' button to be taken to the CIBSE publications website.

TM44: 2012 has been licensed for use by Sterling Accreditation in Sterling e-volve. This document has been locked and under no circumstances should Energy Assessors attempt to reproduce the content without prior written consent from CIBSE.





New Features in this release

All of the features for creating the mandatory Certificate and Report have not changed, but we have bolted on some additional features which will allow you to create a fully branded report in your own corporate logos.

Project Management

Create a new Project based on an Existing Report, simply select this feature from the Project Manager and select the report/template that you want to use as the base and modify the report to suit.

Close Project

New Button on the top Menu bar. Close the active project and return to the project manager.

Add Photos

Add photos throughout the report, all added photos are included in an appendix when the Report Wrapper feature is used. [See page 33.](#)

Create a Branded front page

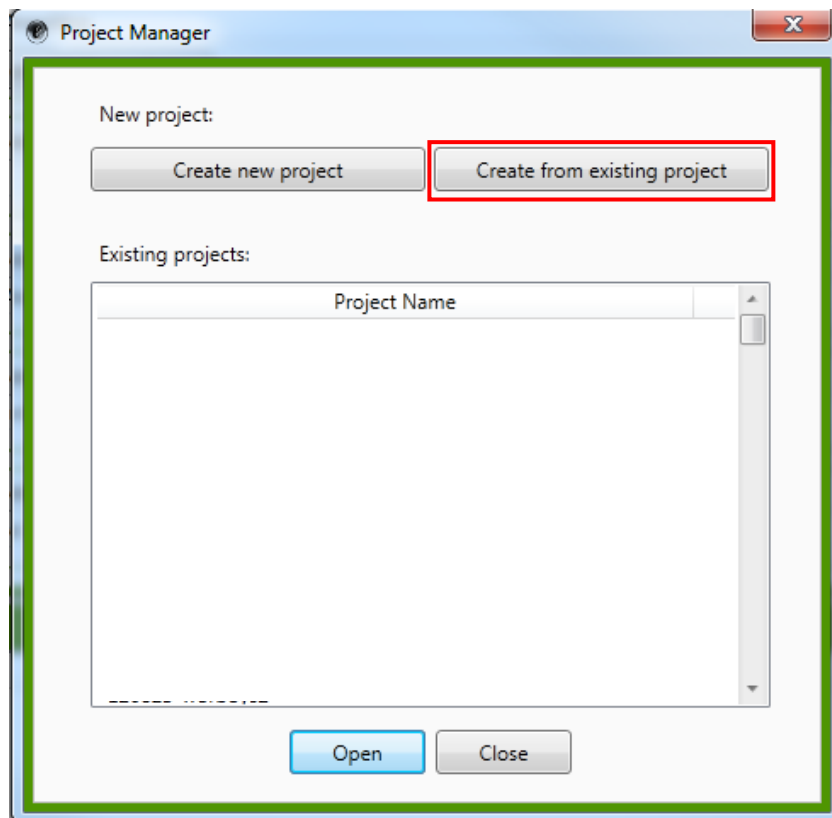
This feature will automatically create a front page for your report, including your company logo and an image of the building inspected. Note: Requires you to add your logos to your profile and add a photo to Building/Site Name. [See Page 34.](#)

Enhanced Executive Summary Editor

A MS Word-like editor that allows you to import your Report Executive Summary and add photos, tables and charts or you can simply cut and paste from other documents. This summary is included when Generate Wrapper is selected at Document creation. [See Page 35.](#)

Key Recommendations

Provide your Client with a list of recommendations in priority order. This feature is included when Generate wrapper is selected at Document Creation. [See Page 36.](#)

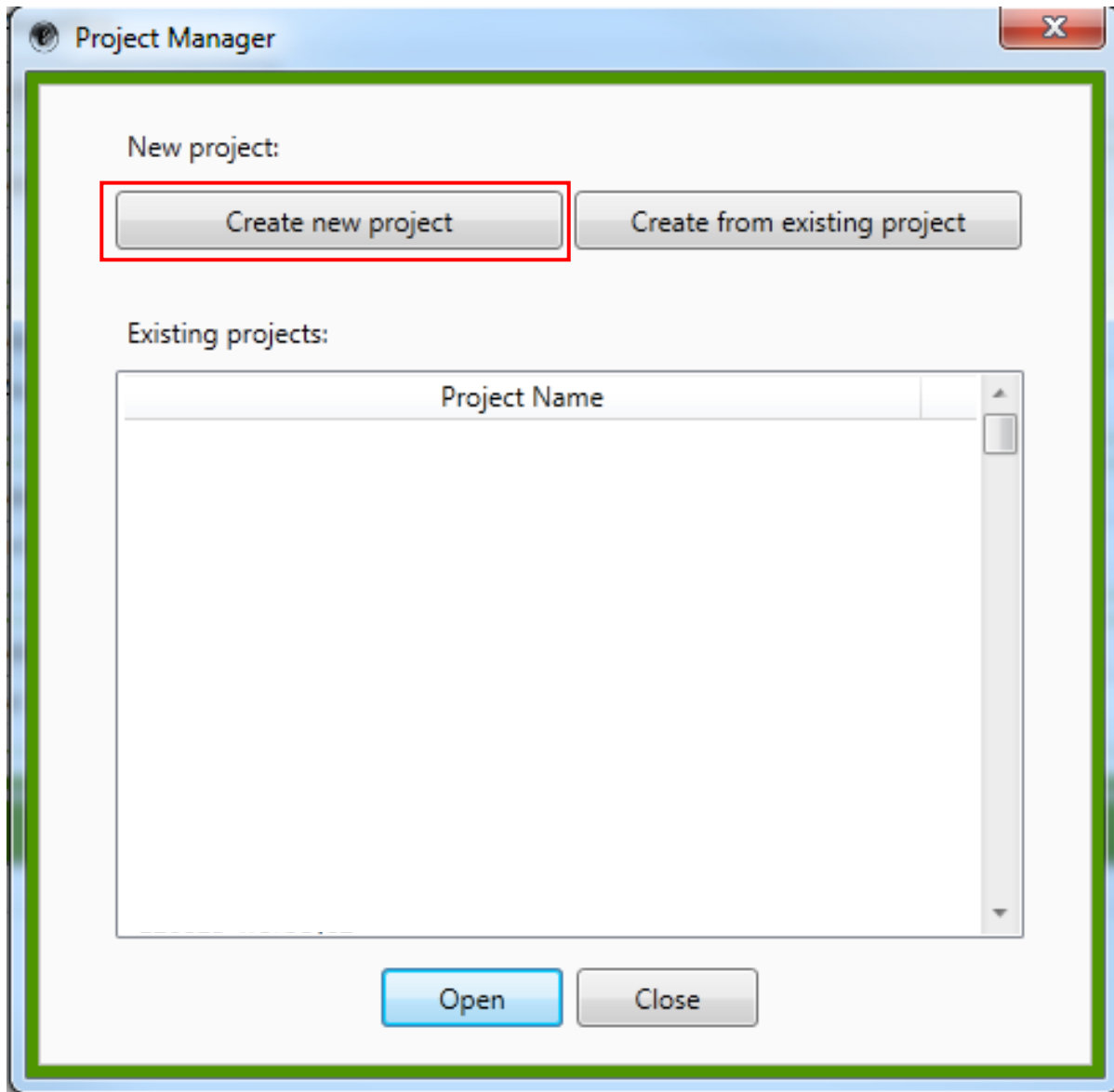
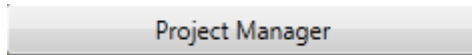




Creating a Report

Now you have created your Assessor Profile we are ready to start writing a report.

Click 'Project Manager' from the Menu Bar.



Click on 'Create New Project'

Enter a Name for the Project: Example: Sterling Accreditation – Havant Office

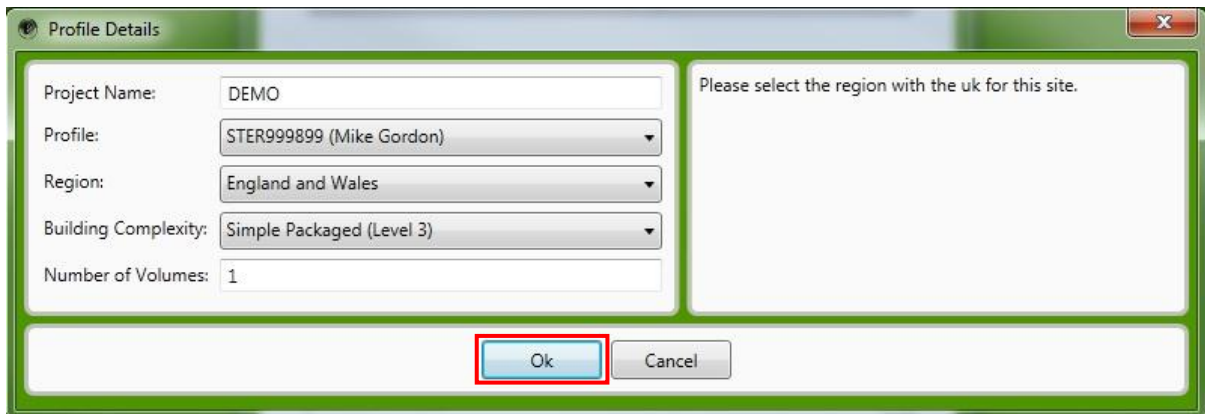


If you have more than 1 Assessor Profile configured please select the profile you wish to use to write this report. Note: If you have assigned the wrong assessor profile when creating a report you can change this when you come to create the Certificate and Report Documents for Lodgement.

Select the Region that the report is being created for. Drop down menu selection for 'England & Wales' or 'Northern Ireland'.

Specify the building Complexity using the drop down menu provided.

Enter the number of Volumes that you are reporting on. Note if you need to increase or decrease the number of volumes this can be done at any point during the report writing stage.



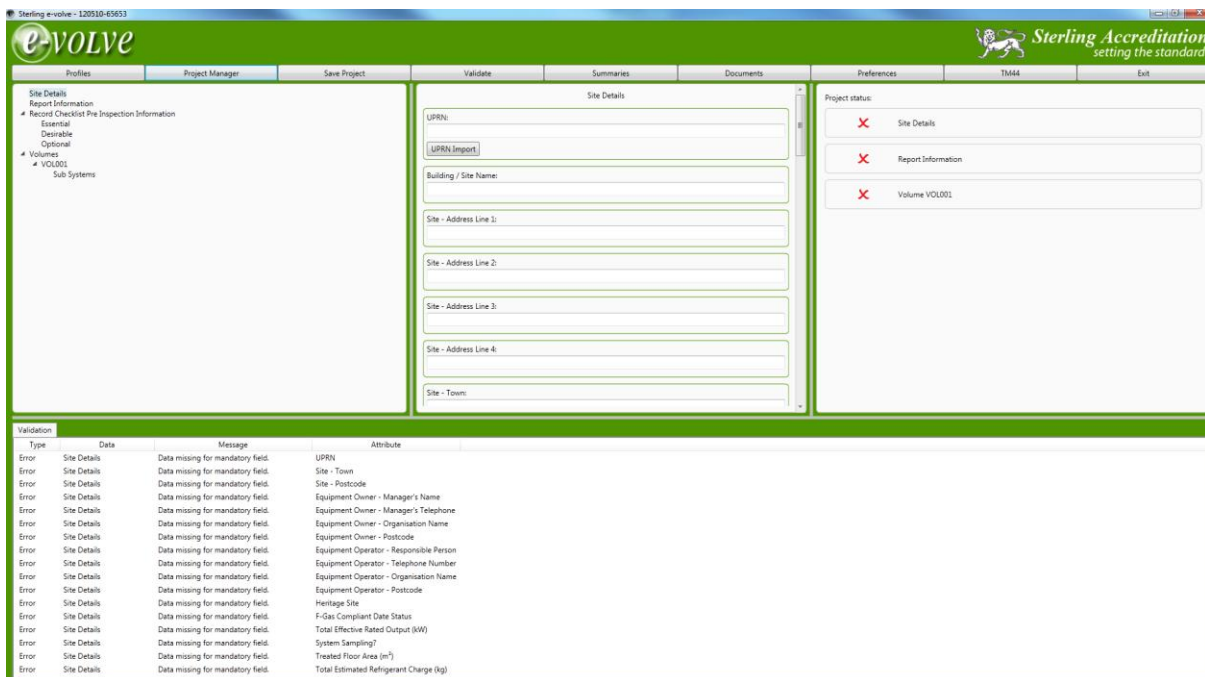
The 'Profile Details' dialog box contains the following fields:

- Project Name: DEMO
- Profile: STER999899 (Mike Gordon)
- Region: England and Wales
- Building Complexity: Simple Packaged (Level 3)
- Number of Volumes: 1

A message box on the right says: "Please select the region with the uk for this site." At the bottom, the 'Ok' button is highlighted with a red rectangle.

When all fields have been completed click 'OK' to Continue

The report writer should now be visible on screen.



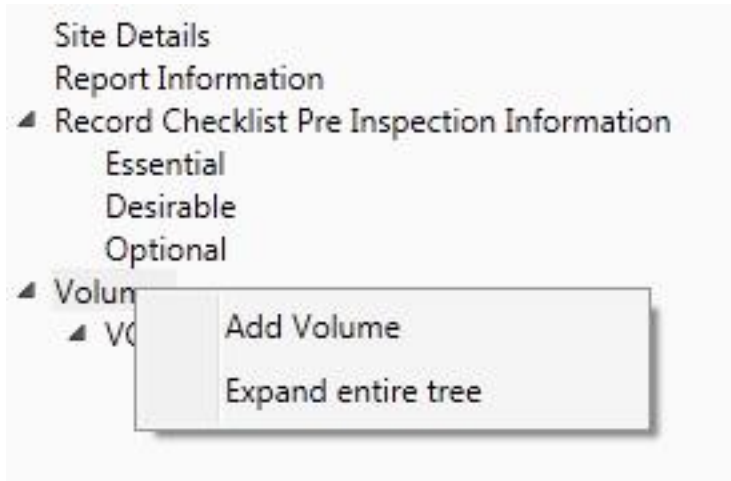
The screenshot shows the 'Validate' tab in the e-volve software. The 'Site Details' form is visible, and a 'Project status' panel on the right shows three items with red 'X' marks: 'Site Details', 'Report Information', and 'Volume VOL001'. Below the form is a 'Validation' table with the following data:

Type	Data	Message	Attribute
Error	Site Details	Data missing for mandatory field.	UPRN
Error	Site Details	Data missing for mandatory field.	Site - Town
Error	Site Details	Data missing for mandatory field.	Site - Postcode
Error	Site Details	Data missing for mandatory field.	Equipment Owner - Manager's Name
Error	Site Details	Data missing for mandatory field.	Equipment Owner - Manager's Telephone
Error	Site Details	Data missing for mandatory field.	Equipment Owner - Organisation Name
Error	Site Details	Data missing for mandatory field.	Equipment Owner - Postcode
Error	Site Details	Data missing for mandatory field.	Equipment Operator - Responsible Person
Error	Site Details	Data missing for mandatory field.	Equipment Operator - Telephone Number
Error	Site Details	Data missing for mandatory field.	Equipment Operator - Organisation Name
Error	Site Details	Data missing for mandatory field.	Equipment Operator - Postcode
Error	Site Details	Data missing for mandatory field.	Heritage Site
Error	Site Details	Data missing for mandatory field.	F-Gas Compliant Date Status
Error	Site Details	Data missing for mandatory field.	Total Effective Rated Output (kW)
Error	Site Details	Data missing for mandatory field.	System Sampling?
Error	Site Details	Data missing for mandatory field.	Treated Floor Area (m ²)
Error	Site Details	Data missing for mandatory field.	Total Estimated Refrigerant Charge (kg)



Overview of Report writing Features

Navigating through the reporting elements



Clicking on each of the items on the menu shown (left) will change the Centre Panel of the Screen to allow you to input the necessary information required.

If you 'Right Click' with your mouse on the menu Note: you can expand the entire tree in a single click.

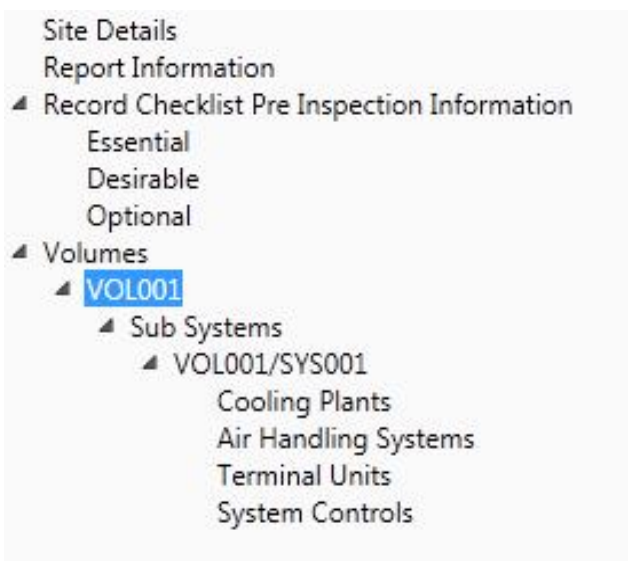
Once you have added a sub System a new section of the tree menu will appear allowing the input for

Cooling Plant, Air Handling Units, Terminal Units and Sub System Controls.



Feature – HELP when you need it

Whenever you place your mouse cursor into a field or hover the cursor over a question, the right hand panel of e-volve changes to context sensitive help. TM44: 2012 has now been included in these help sections to assist with answering the questions or to jog your memory and save you from needing to wait for a feedback from a Technical Query placed through technical support.



All of the required elements for input are covered in the following pages of this User Manual.

e-volve provides a number of additional features and at a glance information.

At the bottom of the report writing screen, you'll see a LIVE validation guide, clicking on each element of the menu tree will reduce this validation items to just this section of the menu.

Note: You can double click on a validation error to jump to that specific question.



In the right hand panel of the reporting writing screen there is a quick glance section complete menu, once each section of the report has all the mandatory elements entered the 'red cross' will turn to a 'green tick'

Project status:



Site Details



Report Information



Volume VOL001



Feature - Spell checking included as standard.

As part of the Quality Auditing requirement, reports must be assessed for the number of spelling mistakes on any given section of 10 pages. If the number of spelling mistakes is deemed as more than the set acceptable level, this will score towards an audit failure.

e-volve, much like a word processing application, underlines your spelling mistakes using a red line. 'Right click' the word for a suggestion to be made and replace by clicking the correct word in the menu. If the word is correct but still underlined, you can add your word to your custom dictionary so that when you use this word again it doesn't get underlined.



Feature – Certificate

To save you valuable time and reduce the frustration of having to key in information multiple times, e-volve takes the information from the report and auto-populates the certificate. When you generate your documents for lodgement you'll notice that a draft certificate has been produced. Always check through your documents for accuracy prior to lodgement.

Site Details

In this section of the report you will need to input all the information about the Building.

Fields requiring Input:

UPRN or Import UPRN
Building Site Name
Site Address Line 1
Site Address Line 2
Site Address Line 3
Site Address Line 4
Site Town

Mandatory Entry – 12 Numbers Required
Optional Entry – Text Description of Site/Building
Optional – cut & paste or imported from Landmark
Optional – cut & paste or imported from Landmark
Optional – cut & paste or imported from Landmark
Optional – cut & paste or imported from Landmark
Mandatory – Enter Town or import from Landmark





Site Postcode	Mandatory – Enter Postcode or import
Equipment Owner – Managers Name	Mandatory – Enter the Name of the Manager
Equipment Owner – Managers Telephone	Mandatory – Enter the Managers Telephone No.
Equipment Owner – Organisation Name	Mandatory – Enter the Owners Company
Equipment Owner Address 1	Optional – See Note on Copy Feature below
Equipment Owner Address 2	Optional – See Note on Copy Feature below
Equipment Owner Address 3	Optional – See Note on Copy Feature below
Equipment Owner Address 4	Optional – See Note on Copy Feature below
Equipment Owner Town	Optional – See Note on Copy Feature below
Equipment Owner Postcode	Optional – See Note on Copy Feature below
Equipment Operator – Responsible Person	Mandatory – Enter Name
Equipment Operator – Telephone Number	Mandatory – Enter Phone Number
Equipment Operator – Organisation Name	Mandatory – Enter Organisation
Equipment Operator Address 1	Optional – See Note on Copy Feature below
Equipment Operator Address 2	Optional – See Note on Copy Feature below
Equipment Operator Address 3	Optional – See Note on Copy Feature below
Equipment Operator Address 4	Optional – See Note on Copy Feature below
Equipment Operator Town	Optional – See Note on Copy Feature below
Equipment Operator Postcode	Optional – See Note on Copy Feature below
Heritage Site	Mandatory – Answer Yes / No
F-Gas Compliant Date	Optional – Enter Date if available
Total Effective Rated Output	Mandatory – Enter Maximum calorific output specified and guaranteed by the systems manufacturer
System Sampling	Mandatory – Specify Yes/No to system sampling. Explanation of System Sampling – Hold mouse over the field to reveal ‘Help Information’ on Right Hand Panel
Treated Floor Area	Mandatory – Enter Total Conditioned Area
Air Conditioning sub systems metered	Mandatory – Yes/No to sub systems having meters
Total Estimated Refrigerant Charge	Mandatory – Enter total Refrigerant charge of system

Landmark Address Import

In order to lodge a report onto the Central Register the address of the property must match the Landmark database of Unique Property Reference Numbers (UPRN).

UPRN:

UPRN Import

To directly import the Site Address from the Landmark Database, select ‘UPRN Import’
You have the choice to search by Postcode or by UPRN if it is already know.
The following menu will appear:



UPRN Import

Source: England and Wales

Postcode: Search

Matching:

UPRN: Search

Matching:

If you wish to search by postcode, enter the postcode here.

Import Cancel

Type the postcode of the building and click 'Search'.

A list of addresses in the postcode area will be listed in the top 'matching' field, select the address that matches the property inspected. Your selection will appear in the lower 'matching' field, and the import button will become available. Click 'Import' to apply the address to your report.

If you already know the UPRN of the property being inspected, enter it into the UPRN field and click search, the address will be listed in the lower Matching field. Click 'Import' to apply the address to your report.

UPRN Import

Source: England and Wales

Postcode: PO9 1HS Search

Matching: 15-16 Broadmarsh Business & Innovation Centre, Harts Farm Way, HAVA
17 Broadmarsh Business & Innovation Centre, Harts Farm Way, HAVA
18 Broadmarsh Business & Innovation Centre, Harts Farm Way, HAVA
19 Broadmarsh Business & Innovation Centre, Harts Farm Way, HAVA

UPRN: Search

Matching: 15-16, Broadmarsh Business & Innovation Centre, Harts Farm Way, HAVA

Import Cancel



Feature

If the Equipment Owner has the same address as the Site, to save typing the same address in again, you can click on 'Copy entire address from site address' to copy the address from the site address to the Equipment Owner address.

If the Equipment Operator shares the same name and address as the Equipment Owner you can click on 'Copy all details from equipment owner' this will copy all three Name, Organisation and Telephone number plus all the address lines into this section.

Report Information

It is essential that the Inspection Date is entered to match the date you actually visited site, if your report is audited, these dates will be checked against your site photos to ensure that all dates correspond.

Inspection Date
Valid Until Date

Mandatory – Enter the Date you were on-site
Mandatory – Leave Blank to have 5 years entered



Feature – Default Dates and automatic assignment

Air Conditioning systems must be inspected every five years, so the pre defined Valid Until Date for your report to be valid is Inspection Date + five years. 'Issue Date' & 'Registration Date', both of these fields are automatically entered when you generate your report and certificate just prior to lodgement.

Related Party Disclosure
Building Complexity
Language – English / Welsh

Mandatory – Select appropriate option from menu
Mandatory – specify Level 3 or Level 4
Select Language from drop down menu



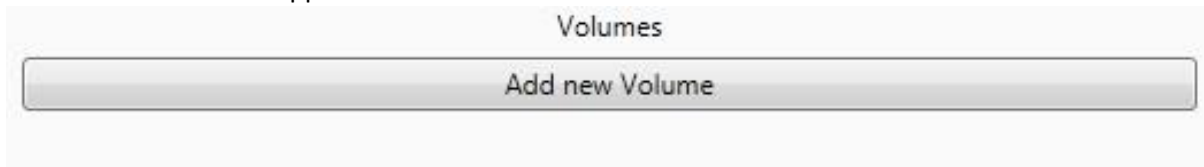
Record Checklist Pre Inspection Information

This section of the report has three headings Essential, Desirable and Optional. All questions in these areas are Mandatory and must be answered. Most of the information required to answer the questions correctly should be supplied or be available on site during your inspection.

You must review the information provided by the client and note any discrepancies between the information provided and what you have recorded during your site visit.

Volume(s) & Definitions

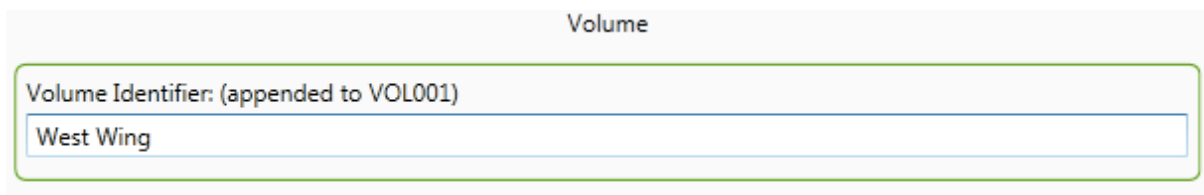
During the initial setup of the Project you would have specified the number of volumes that you require to be included in this report. If at any point you need to add another volume this can be completed by clicking on 'Volumes' in the menu tree, the centre panel will change and a button to add a new volume will appear.



If you have created too many volumes these can quickly be removed by 'right clicking' on the VOL number and selecting delete.

Volume Identifier

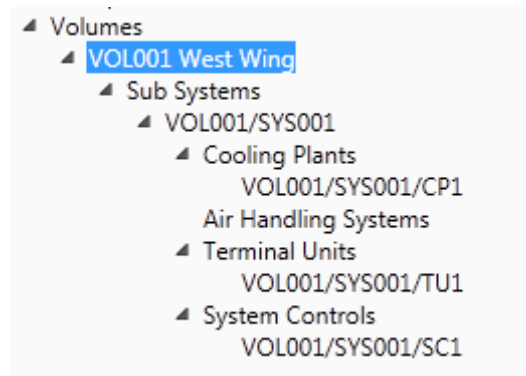
This field is optional a system generated VOL ID Number will be automatically be assigned. If you wish to append the VOL ID with a description that better reflects the building allowing for ease of navigation around the report, complete the Volume Identifier field.



Each volume is assigned a VOL ID in the form VOL001, VOL002, VOL003 etc.

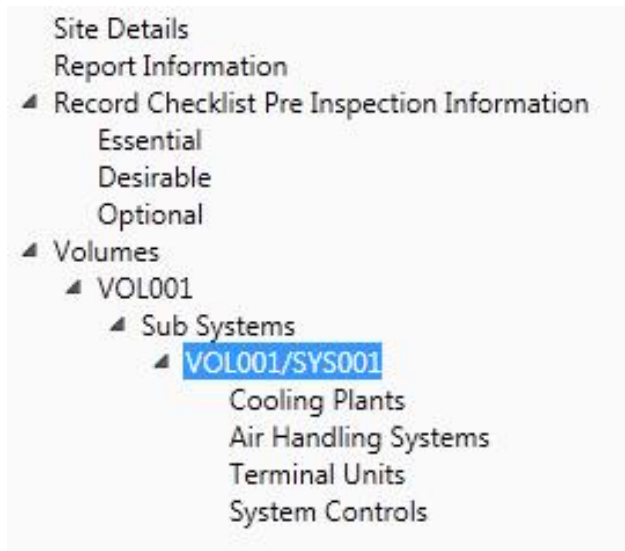
Examples

- VOL001 = Outpatients
- VOL002 = Dermatology
- VOL003 = Optics





Sub Systems



Now that we have defined the Volume(s) and assigned any Identifiers we are ready to move onto creating the necessary 'Sub System' elements. 'Right Click' on 'Sub Systems' on the menu tree to add a new Sub System or 'Left Click' and Add a new Sub System by clicking on the button in the centre panel. We now need to identify and Report on this Sub System.

When Clicking on 'VOL001/SYS001' a new screen of questions will appear in the centre panel.

An explanation of the requirements for this section is detailed below.

System Identifier

Description

Area Served

Inspection Date

Effective Rated Cooling Output

Refrigerant Types

Age(s) of Main Components

Cooling Plant Count

Air Handling Unit Count

Terminal Unit Count

Sub System Control Count

Optional – Entering Text will append the SYS ID with a name

Mandatory – Enter a Description of the Sub System

Mandatory – Enter a Name or Description of the Area

Optional – If left Blank, Site Inspection Date is used

Mandatory – See Manufacturer details or calculate

Mandatory – Use drop down menu to specify refrigerant

Mandatory – Use Drop down menu to specify age by year

Mandatory - automatic calculation done on non sampled systems. Enter Number on Sampled Systems

Mandatory - automatic calculation done on non sampled systems. Enter Number on Sampled Systems

Mandatory - automatic calculation done on non sampled systems. Enter Number on Sampled Systems

Mandatory - automatic calculation done on non sampled systems. Enter Number on Sampled Systems

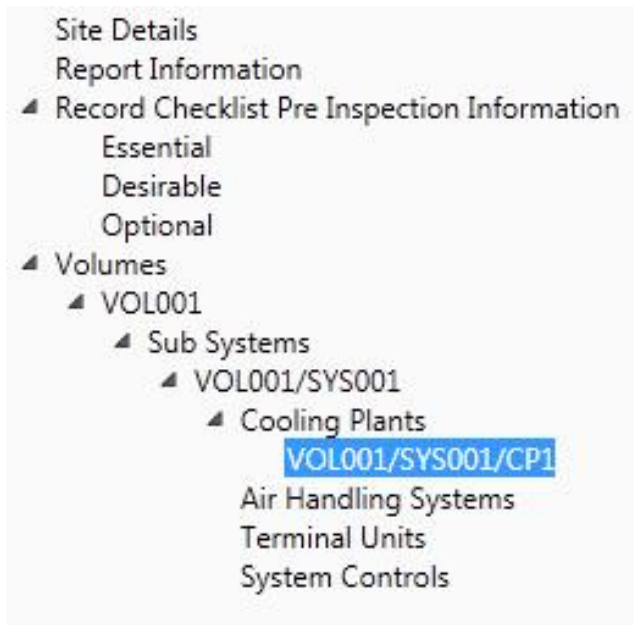


Feature – Automatic Validation

As you navigate the menu tree, you'll notice that the Validation pane across the bottom of the window changes. Clicking on any item on the tree, results in that item plus any sub items being validated and the results displayed at the bottom of the screen. Double-clicking on a validation error will jump you directly to the relevant question or section that needs to be completed. Note: As a quick reference on sections completed the Project Status panel on the right hand side of the screen provides a constant LIVE view of what has been completed and what is left to complete. Clicking on 'Validate' on the TOP MENU BAR will change the content of the Validation screen to always show the entire document.



Cooling Plant



'Right Click' on 'Cooling Plants' in the Menu Tree to add a Cooling Plant section to your report.

Once complete the centre section of the screen will change to a new panel showing a series of questions about the inspected Cooling Plant.

This section of the Manual will guide you quickly through the questions, with some brief descriptions, whilst defining which questions are optional and mandatory.

Component Identifier

Manufacturer

Description

Model/Reference

Serial Number

Year Plant Installed

Rated Cooling Capacity

Refrigerant Type

Refrigerant Type (notes and Recs)

Refrigerant Charge

Location of Cooling Plant

Area/Systems Served

Note discrepancies

Is the refrigeration plant operational

Is the area around the refrigeration plant clear of obstructions and debris – **Mandatory**
Notes and Recommendations mandatory if the answer to this question is NO.

Is the general condition of refrigeration and any associated central plant in good order – **Mandatory**
Notes and Recommendations mandatory if the answer to this question is NO.

Is the condenser placed clear from warm air discharge louvres – **Mandatory**

Optional – Entering Text will append the CP ID with a name

Mandatory – Use drop down menu or Type in if not found

Mandatory – Enter Description of cooling plant

Mandatory – Enter Model / reference number from manufacturer's data plate

Mandatory – Enter Serial number of the cooling plant either outside or in plant room.

Mandatory – Use drop down menu to select year installed

Mandatory – See Manufacturer detail or calculate enter numerical value

Mandatory – Use drop down menu to select refrigerant

Mandatory – Enter Notes and Recommendations on types of refrigerants found

Mandatory – Refrigerant charge in the whole system, see manufacturer's data plate or any F-Gas Paperwork

Mandatory – Make comment reference location of cooling plant

Mandatory – Specify area conditioned by this [particular cooling plant, e.g. Office, Reception

Mandatory – Note discrepancies between client information and evidence found during inspection

Mandatory – Answer Yes /No and add Notes as required.



Notes and Recommendations mandatory if the answer to this question is NO.

Are compressors operational or can they be bought into operation – **Mandatory**

Notes and Recommendations mandatory if the answer to this question is NO.

Is the heat rejection plant operational – **Mandatory**

Notes and Recommendations mandatory if the answer to this question is NO.

Are condenser heat exchangers undamaged/un-corroded and clean – **Mandatory**

Notes and Recommendations mandatory if the answer to this question is NO.

Is the area around the heat rejection plant clear of obstructions & Debris – **Mandatory**

Notes and Recommendations mandatory if the answer to this question is NO.

Is the condenser free of any possibility of air recirculation – **Mandatory**

Notes and Recommendations mandatory if the answer to this question is NO.

Is the insulation on circulation pipe work well fitted and in good order – **Mandatory**

Notes and Recommendations mandatory if the answer to this question is NO.

Montreal/ODS/F-Gas controlled – **Mandatory**

Notes and Recommendations Mandatory

Is there evidence of regular maintenance – **Mandatory**

Notes and Recommendations Mandatory

Is maintenance undertaken by suitably competent people in accordance to industry guidelines –

Mandatory - Notes and Recommendations Mandatory

Total Occupants served by this plant

Mandatory – Numerical Value total number of occupants in the whole of the area served by this cooling plant

Total Floor area served by this plant

Mandatory – Total Gross internal floor area

Occupant Density (sq.m/person)

Mandatory – Divide Floor area by Occupants

Maximum Instantaneous Heat Gain

Mandatory – Can be derived from TM44 Table 3.1

Notes and Recommendations – Mandatory

Installed Cooling Capacity

Mandatory – Enter installed Cooling Capacity

The installed size is deemed

Mandatory – Use drop down menu

Notes and Recommendations – Mandatory

Is metering installed to enable monitoring of energy consumption of refrigeration plant –

Mandatory - Notes and Recommendations Mandatory if answer = NO

Record Meter reading – Not Mandatory unless you have answered Yes to above question

Is the refrigeration plant connected to a BMS that can provide out of range alarms – **Mandatory**

Notes and Recommendations Mandatory if answer = NO



Are there any records of air conditioning plant usage or sub-metered energy consumption with expected hours of use per year for the plant – **Mandatory** – Notes and Recommendations
Mandatory if answer = NO

Is the energy consumption or hours of use excessive – **Mandatory** – Notes and Recommendations
Mandatory if answer = YES

Are there any signs of refrigerant leaks – **Mandatory** – Notes and Recommendations
Mandatory if answer = YES

Refrigeration Temperature (Pre Compressor) – **Mandatory** – Enter Temperature
Refrigeration Temperature (Post Compressor) – **Mandatory** – Enter Temperature
Refrigeration Temperature (Ambient) – **Mandatory** – Enter Temperature

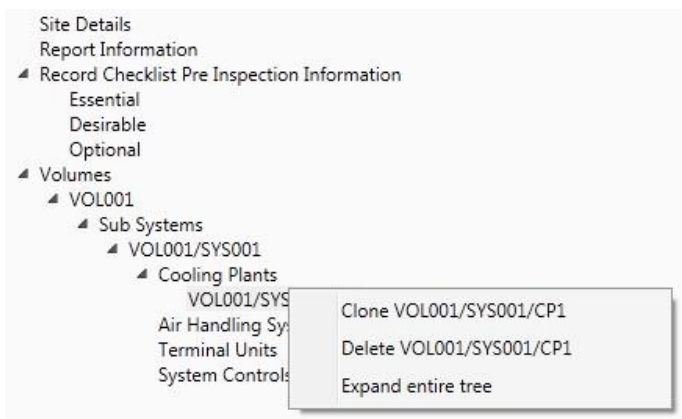
The temperature is Deemed – **Mandatory** –
Notes and Recommendations Mandatory if answer = More or less than Expected.

Assess the refrigeration compressor(s) and the method of refrigeration capacity control –
Mandatory – Record additional information in Notes and Recommendations if findings are of a negative nature.

Is the water flow through cooling towers or evaporative coolers even and efficient, and is no loss of water – **Mandatory** – Notes and Recommendations
Mandatory if answer = NO

Is there a management regime in place to ensure that water is regularly checked and treated to ensure that there is no Legionella risk – **Mandatory** – Notes and Recommendations
Mandatory if answer = NO

Clone a Cooling Plant



In cases where a majority of the information recorded against a sub system are the same, you can quickly replicate the completed cooling plant and Clone it into a new cooling plant.

‘Right Click’ on the ‘Cooling Plant’ in this case:

VOL001/SYS001/CP1 and click ‘Clone’. A new Cooling plant will appear below the

existing cooling plant and will have automatically been assigned a CP ID i.e VOL001/SYS001/CP2



Air Handling Systems



'Right Click' on 'Air Handling Systems' in the Menu Tree to add an Air Handling System section to your report.

Once complete the centre section of the screen will change to a new panel showing a series of questions about the inspected Air Handling Systems.

This section of the Manual will guide you quickly through the questions, with some brief descriptions, whilst defining which questions are optional and mandatory.

Component Identifier	Optional – Entering Text will append the AHU ID with a name
Manufacturer	Mandatory – Use drop down menu or Type Text to specify
Year Systems Installed	Mandatory – Use drop down menu to select Year installed
Location of Plant	Mandatory – Enter Description of location of Plant
Systems Served	Mandatory – Enter the Area conditioned by the system
Areas Served	Mandatory – Enter the Area served by this Terminal Unit

Note below any discrepancy between information provided by Client and on site information collected, or any information of additional relevance to the AHU System: - **Mandatory**

Estimate the specific fan power (SFP) of air movement systems – **Mandatory**
Notes and Recommendations Optional

Are air flow rates and system pressures available from commissioning data – **Mandatory**
Notes and Recommendations Optional

Are air intakes and filter conditions acceptable – **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Have filters been changed according to current industry guidance – **Mandatory**
Notes and Recommendations Mandatory - provide explanation of evidence or make recommendation on guidance that should be adopted.

Is the filter differential pressure gauge, where fitted working – **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Are the heat exchangers in good condition – **Mandatory**
Notes and Recommendations Mandatory if answer = NO



Are there any signs of a refrigerant leak – **Mandatory**
Notes and Recommendations Mandatory if answer = YES

Does the fan rotate in the correct direction – **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Is the speed control or modulation operational – **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Note the fan type and method of air speed control – **Mandatory**
Notes and Recommendations Optional – complete if your comments are of a negative nature.

Check the setting and operation air/recirculation dampers – **Mandatory**
Notes and Recommendations Optional – complete if your comments are of a negative nature.

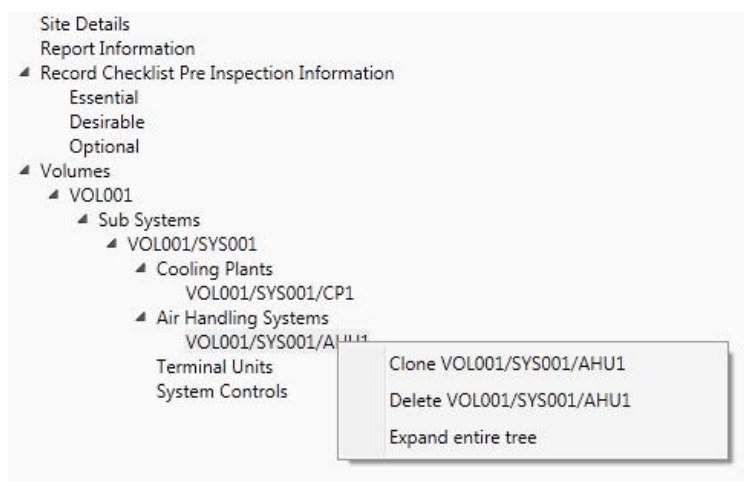
Identify whether system have any energy conservation facilities, e.g Heat recovery – **Mandatory**
Notes and Recommendations Optional – complete if your comments are of a negative nature.

Observe the air handling plant and visible air containment including ductwork, floor or ceiling plenums and builders’ work shafts etc – **Mandatory**
Notes and Recommendations Optional – complete if your comments are of a negative nature.

Note any significant obstructions or blockages to inlet grilles, screens and pre –filters – **Mandatory**
Notes and Recommendations Optional – complete if your comments are of a negative nature.

Note where inlets may be affected by proximity to local sources of heat, or to air exhausts – **Mandatory** - Notes and Recommendations Optional – complete if your comments are of a negative nature.

Clone an Air Handling System



In cases where a majority of the information recorded against a sub system are the same, you can quickly replicate the completed air handling system and Clone it into a new air handling system.

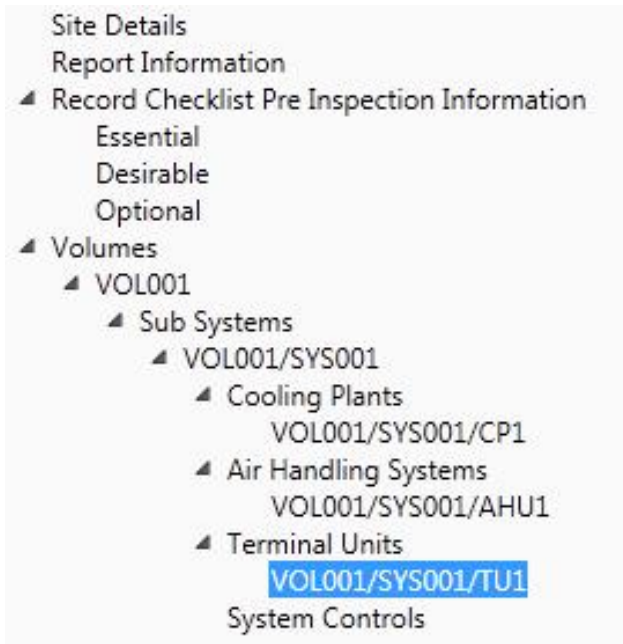
‘Right Click’ on the ‘ Air Handling System’ in this case:

VOL001/SYS001/AHU1 and click ‘Clone’. A new Air Handling System will appear below the existing Air

Handling System and will have automatically been assigned an AHU ID i.e VOL001/SYS001/AHU2



Terminal Units



'Right Click' on 'Terminal Units' in the Menu Tree to add a Terminal Unit section to your report.

Once complete the centre section of the screen will change to a new panel showing a series of questions about the inspected Terminal Units

This section of the Manual will guide you quickly through the questions, with some brief descriptions, whilst defining which questions are optional and mandatory.

Component Identifier	Optional – Entering Text will append the TU ID with a name
Description of Unit	Mandatory
Identify Cooling plant serving Terminal Unit	Mandatory
Manufacturer	Mandatory
Year Terminal unit installed	Mandatory
Terminal Unit Location	Mandatory
Area Served	Mandatory

Note any discrepancy between information provided by client and on site information collected, or any information of additional relevance to the terminal unit system – Optional

Is the pipe work adequately insulated **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Is the Duct work adequately insulated **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Are the terminal units in good working order **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Do the air delivery openings provide good distribution - **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Is there evidence of tampering with diffusers - **Mandatory**
Notes and Recommendations Mandatory



Are chilled and hot water being supplied to terminals simultaneously - **Mandatory**
Notes and Recommendations Mandatory if answer = YES

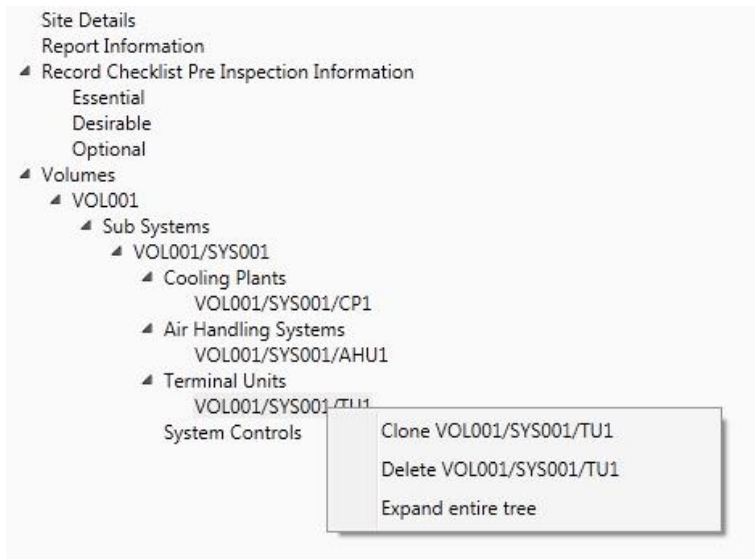
Are there any records of occupant complaints regarding air distribution – **Mandatory**
Notes and Recommendations Mandatory if answer = YES

Is there potential for air to short-circuit from supply to extract - **Mandatory**
Notes and Recommendations Mandatory if answer = YES

Is the position of partitioning or furniture adversely affecting performance - **Mandatory**
Notes and Recommendations Mandatory if answer = YES

Is the control and operation adequate - **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Clone a Terminal Unit



In cases where a majority of the information recorded against a terminal unit are the same, you can quickly replicate the completed terminal unit and Clone it into a new terminal unit.

‘Right Click’ on the ‘Terminal Unit’ System in this case:

VOL001/SYS001/TU1 and click ‘Clone’. A new Terminal Unit will appear below the existing

Terminal Unit and will have automatically been assigned a TU ID i.e VOL001/SYS001/TU2



Sub System Controls

- Site Details
- Report Information
- ▲ Record Checklist Pre Inspection Information
 - Essential
 - Desirable
 - Optional
- ▲ Volumes
 - ▲ VOL001
 - ▲ Sub Systems
 - ▲ VOL001/SYS001
 - ▲ Cooling Plants
VOL001/SYS001/CP1
 - ▲ Air Handling Systems
VOL001/SYS001/AHU1
 - ▲ Terminal Units
VOL001/SYS001/TU1
 - ▲ System Controls
VOL001/SYS001/SC1

'Right Click' on 'Sub System Controls' in the Menu Tree to add a Sub System Control section to your report.

Once complete the centre section of the screen will change to a new panel showing a series of questions about the inspected Sub System Control

This section of the Manual will guide you quickly through the questions, with some brief descriptions, whilst defining which questions are optional and mandatory.

Component Identifier

Optional – Entering Text will append the SC ID with a name

Is the zoning appropriate in relation to anticipated cooling demand - **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Note the current indicated weekday and time of day in controllers or BMS against actual time –
Mandatory – Notes and Recommendation Optional – Use if Comments in Notes are negative

Note the set on and off periods (for weekday and weekend if this facility is available with the timer –
Mandatory - Notes and Recommendation Optional – Use if Comments in Notes are negative

Is there a shortfall in timer capabilities **Mandatory**
Notes and Recommendations Mandatory if answer = YES

Identify and assess zone heating and cooling temperature control sensors. Are the sensor types and locations appropriate in relation to heating and cooling emitters, heat flows or likely temperature distributions in the zone or space – **Mandatory**
Notes and Recommendations Mandatory if answer = NO

Note the set temperature in each zone for heating and cooling in relation to the activities and occupancy of zones and spaces in relation to the manager intent. – **Mandatory**
Notes and Recommendation Optional – Use if Comments in Notes are negative

Note whether a 'dead band' is, or can be, set between heating and cooling – **Mandatory**
Notes and Recommendation Optional – Use if Comments in Notes are negative



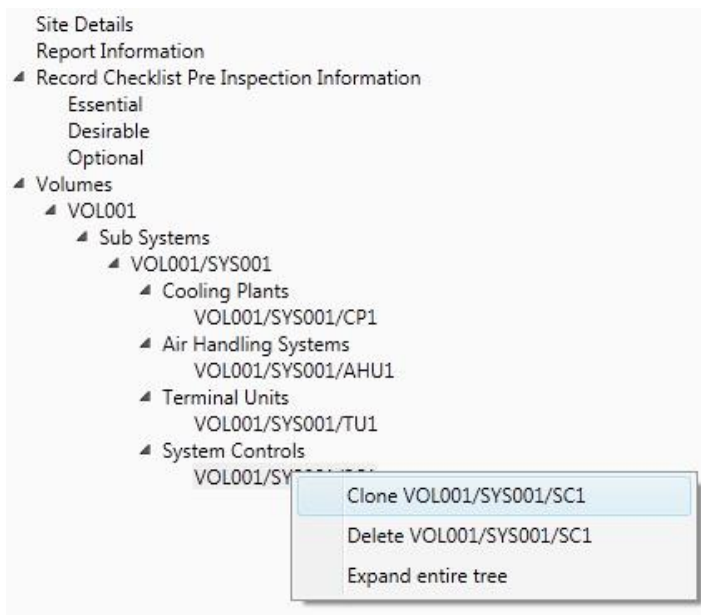


Do the sub system controls integrate effectively with the overall system control strategy –
Mandatory - Notes and Recommendations Mandatory is answer = NO

Assess the means of modulating or controlling air flow rate through the air supply and exhaust ducts
– **Mandatory** – Notes and Recommendation Optional – Use if Comments in Notes are negative

Are guidance notices visible or controls available to inhibit use of cooling equipment whilst windows are open or cooling /heating is on –**Mandatory**
Notes and Recommendations Mandatory is answer = NO

Clone a Sub System Control



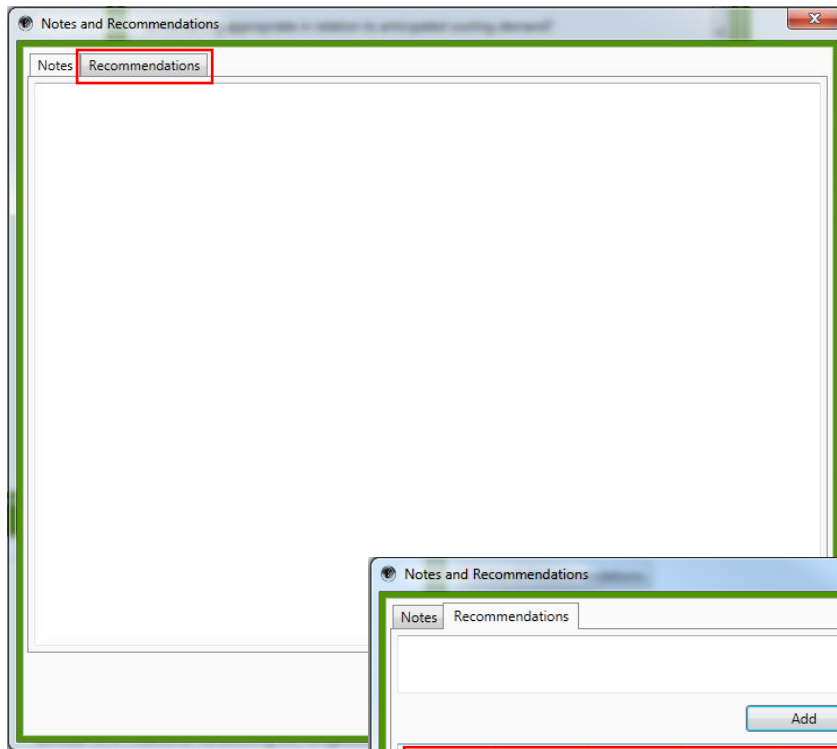
In cases where a majority of the information recorded against a Sub System Control are the same, you can quickly replicate the completed Sub System Control and Clone it into a new Sub System Control

‘Right Click’ on the ‘Sub System Control’ in this case:

VOL001/SYS001/SC1 and click ‘Clone’. A new Sub System Control will appear below the existing Sub System Control and will have automatically been assigned a SC ID i.e VOL001/SYS001/SC2



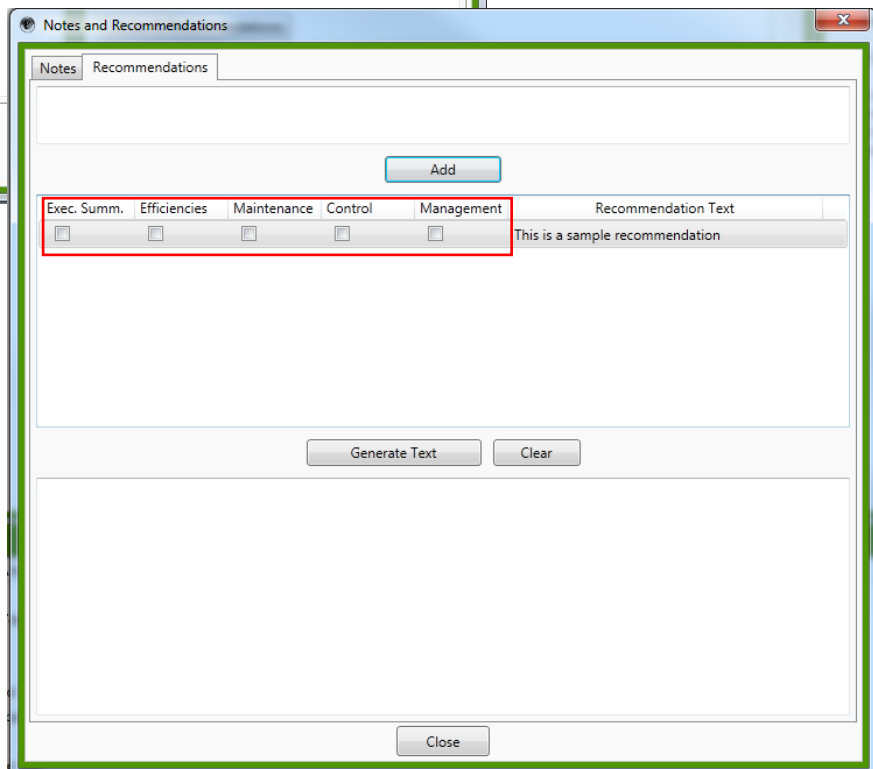
Notes and Recommendations



Adding Notes and Recommendations is straightforward, when you click on the 'Notes & Recommendations' button a Text Editor will appear. Simply type in your Notes and when complete click 'Close'.

If you need to add a Recommendation, click on the 'Recommendation' tab at the top of the window. (Left)

Type the Recommendation you want to add to the section of the report in the top panel. Once complete, click 'Add' and you'll notice that the recommendation has now moved to the centre panel and you have the option of adding (tick) the recommendation to the Executive Summary, and/or appropriate key recommendations sections (Efficiencies, Maintenance, Control and Management).



If the recommendation that you have entered needs to be changed, Right click on the 'Recommendation' in the centre panel and click 'edit', correct the text and click 'OK'.

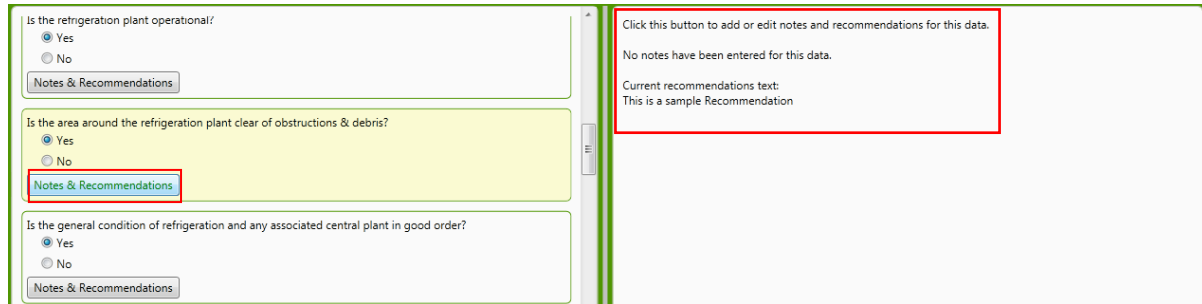
If you have produced a list of recommendations for this question and you want to change the order in which they are listed, 'Right Click' on the recommendation and click 'move up' or 'move down' as required. In the event where you have entered a Recommendation that you no longer wish to appear in the list, Right Click the 'recommendation' and click 'Delete'.

If you still want to make additional changes to the Recommendations, specific to the question you are answering, Click 'Generate Text', the recommendation(s) will then appear in the bottom panel allowing you to edit the text. This change leaves the original recommendation(s) untouched and changes the recommendation(s) specific to the question you are answering.



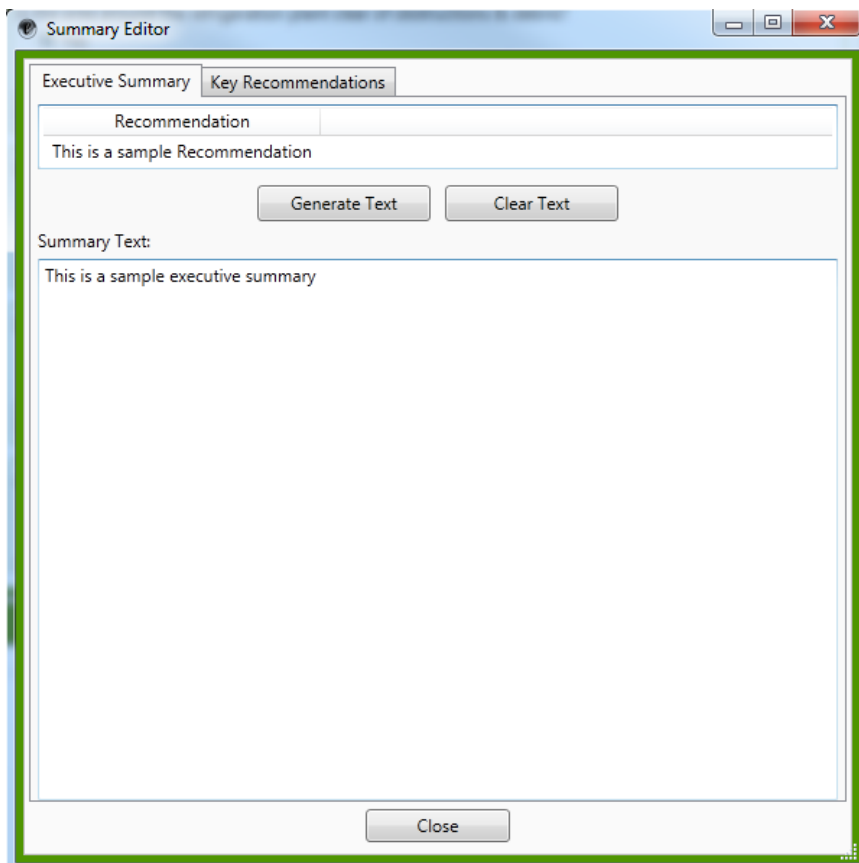
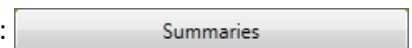
Preview Notes & Recommendations

When you hover your cursor over the Notes & Recommendations buttons, the Right Hand Pane will change to preview of the contents of firstly the Notes you have entered followed by Recommendations. Clicking the Notes and Recommendations buttons will allow you to edit the contents.



Executive Summary

To access the Summaries, click on the 'Summaries' button on the menu bar:



The Executive Summary is a mandatory requirement of the report and must be completed. If you attempt to generate the Final Report and Certificate without completing this stage, an error message will appear requesting that this section of the report requires completion.

The Summaries editor is very similar to the operation of the Notes and Recommendations Editor. At the top of the window is a Summary Section drop down menu, select the summary you wish to edit and in the centre panel any recommendations that you have requested to be

included in the summary will be listed.

The ability to flag recommendations to appear in the summary sections has been added to remind you of potential improvements that could be made to the Air Conditioning system that you inspected and help you to generate a summary that is useful to your customer.



If you would like the recommendations to appear in the executive summary, Click 'Generate Text' and then edit as required in the 'Summary Text' box. **Warning Clicking 'Generate Text' after you have entered text into the Summary window will overwrite the contents of the Summary Window.**

Click 'Close' when you have finished editing your summary and recommendations (automatic save).

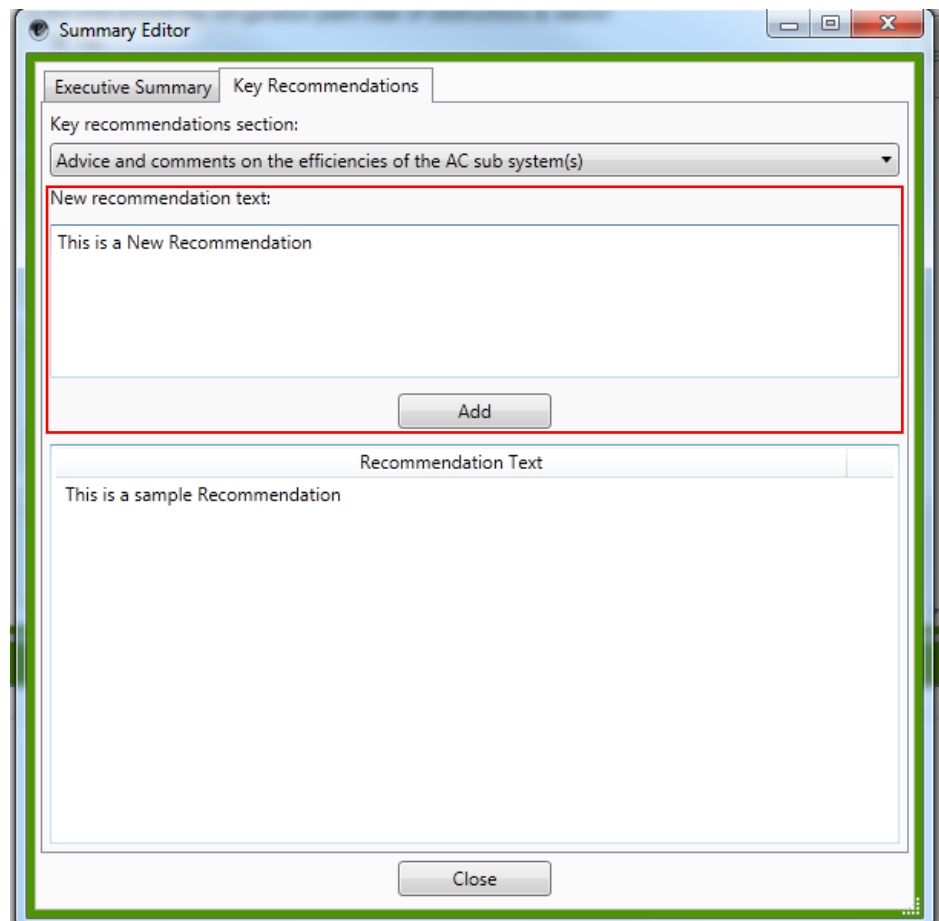
If you have added text to the 'Summary Text' box and have not clicked 'Generate Text', the recommendations will not appear in the summary. If the summary text box is left blank, then a simple list of the recommendations will be copied into the summary section automatically.

Key Recommendations

Other summaries that are available for you to complete are:

- Advice and comments on the efficiencies of the AC sub system(s)
- Advice and comments on the maintenance of the AC sub system(s)
- Advice and comments on the control of the AC sub system(s)
- Advice and comments on the management of the AC sub system(s)

If you have selected a recommendation, input into the report to be included in a Key Recommendation, it will automatically appear in the bottom screen, shown here. To add a new recommendation type your text into the area shown in Red and click Add. To change the order of the recommendations right click on a recommendation in lower screen and select move up or move down. To delete a recommendation right click and select delete.





Report Wrapper – Adding a Photo Appendix

Throughout the reporting software you can now add photos; these photos are automatically imported into the Project sub folder 'Pictures'.

UPRN:
751849650000
UPRN Import

Building / Site Name:
Add photos Show photos

To add a photo to a section of the report, click on the 'Add Photos' button, browse to find your photo and Click 'Open'.

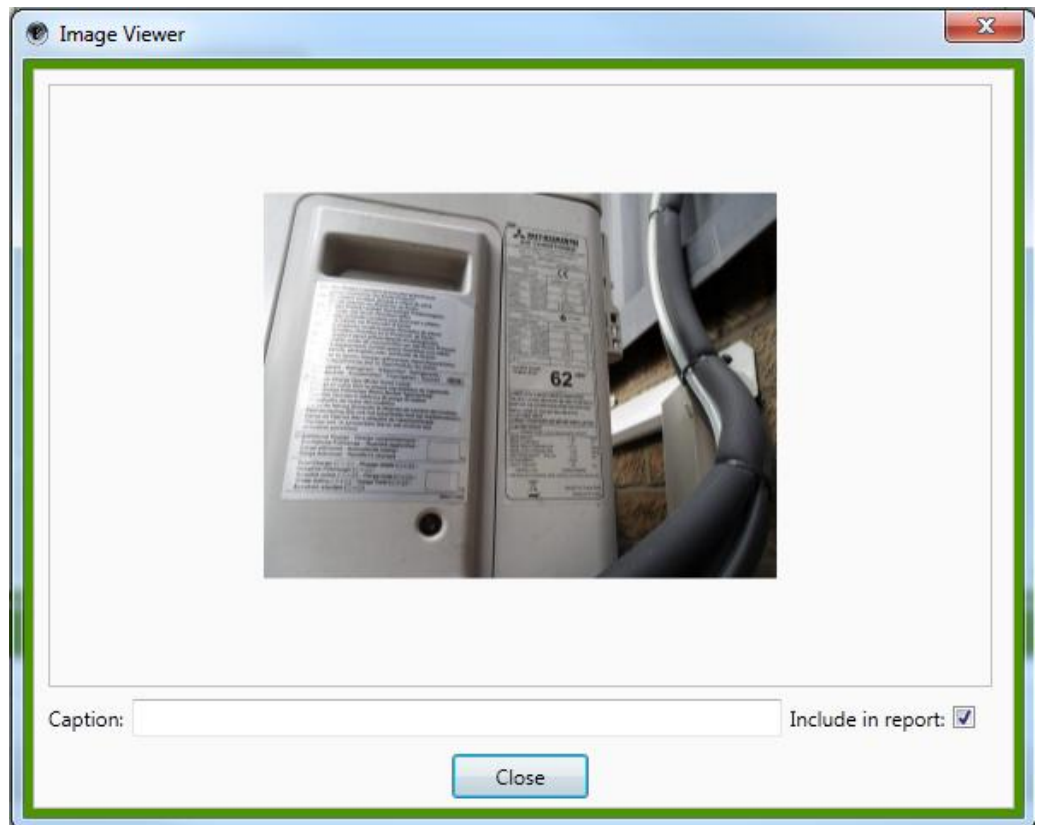
The Image viewer dialogue box now appears, allowing you to add a caption to the photo.

When adding a photo to a section of Plant i.e. a Cooling Plant 1, the photo is automatically tagged with the plant ID i.e. VOL001/SYS001/CP1.

You can as many Photos to each section

of the report as you need. Note: In order to create the photo appendix the photos added to the report are uploaded to our server for wrapping. Adding a large volume of photos could result in the report generation taking a number of minutes to complete.

To manage the photos you have added to a section of the report, click on **Show photos**, this will display a list of the photos added to this section of the report, you can arrange the photos in the desired order, by clicking 'Up' or 'Down', you can remove a photo by clicking 'Delete' and you can change the Caption by double clicking the picture name.



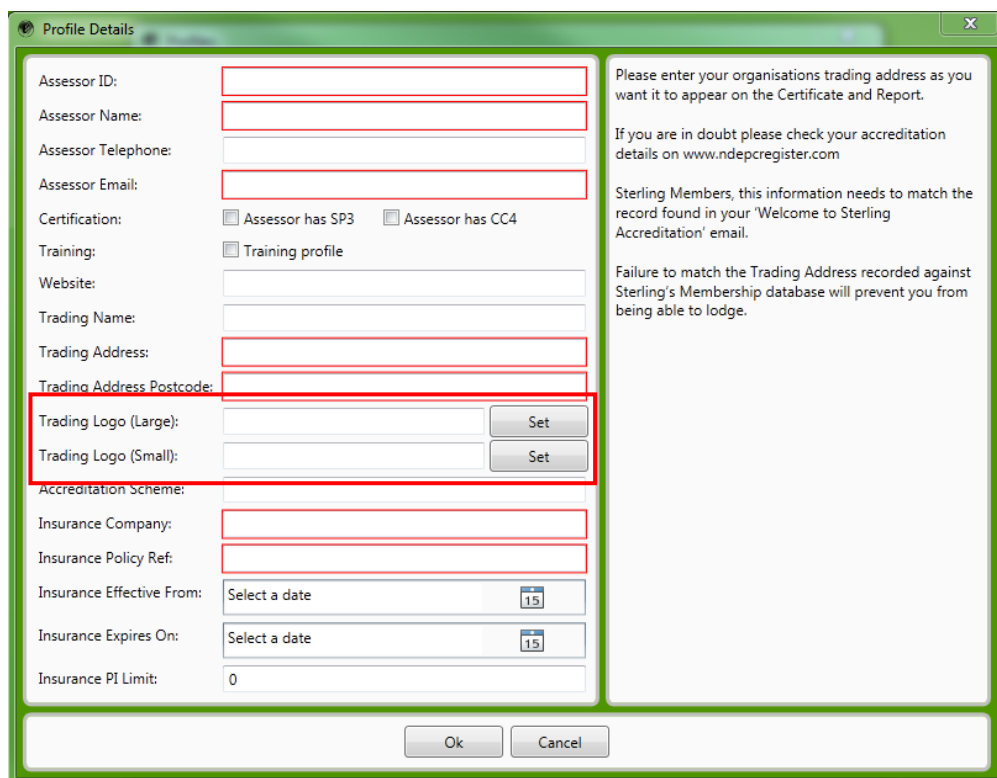


Report Wrapper – Front Page

Sterling e-volve is now capable of creating a fully branded front page to your report. First of all you need to add your Trading Logos in your profile.

The Trading Logo (large) will automatically appear on the Report Wrapper front page; this logo should be no larger than 200 x 150 pixels in size.

The Trading Logo (Small) will automatically appear on the Enhanced Executive Summary, Wrapper Key Recommendations and Photo Appendix, this logo should be no larger than 100 x 50 pixels in size.



Profile Details

Assessor ID:

Assessor Name:

Assessor Telephone:

Assessor Email:

Certification: Assessor has SP3 Assessor has CC4

Training: Training profile

Website:

Trading Name:

Trading Address:

Trading Address Postcode:

Trading Logo (Large):

Trading Logo (Small):

Accreditation Scheme:

Insurance Company:

Insurance Policy Ref:

Insurance Effective From: 15

Insurance Expires On: 15

Insurance PI Limit:

Please enter your organisations trading address as you want it to appear on the Certificate and Report.

If you are in doubt please check your accreditation details on www.ndepcregister.com

Sterling Members, this information needs to match the record found in your 'Welcome to Sterling Accreditation' email.

Failure to match the Trading Address recorded against Sterling's Membership database will prevent you from being able to lodge.

The front page of the report is automatically populated from information already stored within the report. If you have added a photo of the building under Site details this will be the image that appears on the front page.

Details automatically included on the front page are as follows:

Title 1 - Trading Name

Title 2 – Air Conditioning Inspection Report

Title 3 – Report Type: Simple Packaged (Level 3) or Complex System (Level 4)

Company Name: Automatically selects - Building/Site Name

Company Address: Automatically populated from Site Address

Name of Inspector: Automatically populated from Profile selected during report creation

Inspector Number: Automatically populated from Profile selected during report creation

Accreditation Scheme: Automatically populated from Profile selected during report creation

Inspection Date: Automatically populated from Report

Report Expiry Date: Automatically populated from Report

Accredited Company: Automatically populated from Profile Trading Name

Address: Automatically populated from Profile Trading Address

UPRN: Automatically populated from Report

Certificate RRN: Automatically populated from Report

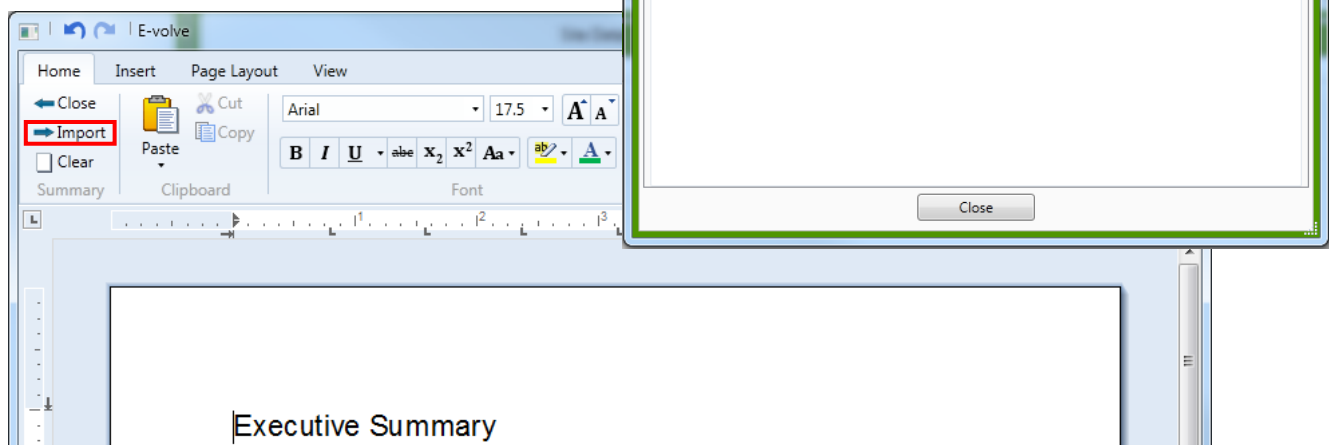
Report RRN: Automatically populated from Report



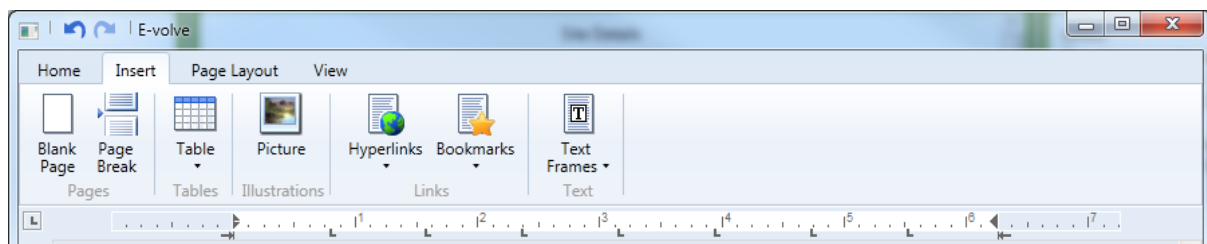
Report Wrapper – Enhanced Executive Summary Editor

Sterling e-volve now allows you to add just about anything you like to an Executive Summary, this includes Photos, Tables and Charts. You can format your text by adding Bold and Italics and superscript characters.

Clicking on the Enhanced Editor button, will launch a MS Word-like Editor, which provides all the tools that most people will recognise. Clicking Import will copy the contents of the Report Executive Summary and place it into the Editor Window. Modify Text as required.



By selecting the Insert Tab, you can add, Page Breaks, Tables and Pictures as required. Photos can be manipulated with a Right Click and selecting Format Image. Spell Checking has been included with a Custom Dictionary for those words not instantly recognised.



If you prefer, you can cut and paste your tables, charts text and photos from a previously-created Word Document.



Report Wrapper – Enhanced Key Recommendations

One of the most important aspects of providing a report to a client is that they can clearly understand the content and what remedial actions are required.

Enhanced Key Recommendations automatically imports all of the recommendations from the entire report and the 4 key recommendations sections and allows you to order them in 3 priorities High, Medium and Low (see Example – Right)

To access this feature, Click on Summaries and then Select Wrapper Recommendations. See below for an example. To change the order or priority, right click on a Recommendation and select the option you require.

Key Recommendations

High Priority

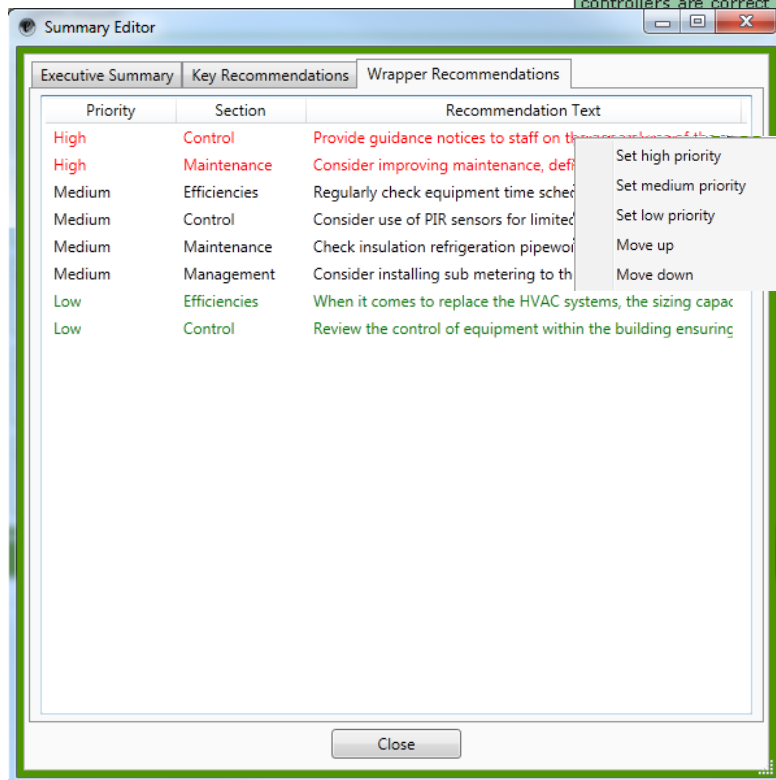
- Provide guidance notices to staff on the general use of the system controllers
- Consider improving maintenance, deficiencies were found and if corrected could increase efficiency and lifetime of equipment

Medium Priority

- Regularly check equipment time schedule programmes match actual current occupancy times
- Consider use of PIR sensors for limited use rooms such as meeting rooms. PIR systems can trigger AC and Lighting systems, which can automatically switch off when the room is empty
- Check insulation refrigeration pipework more frequently to avoid deterioration
- Consider installing sub metering to the plant to enable the recording of electricity consumption

Other recommendations

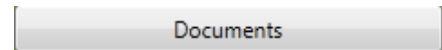
- When it comes to replace the HVAC systems, the sizing capacity should be re-assessed
- Review the control of equipment within the building ensuring that all dates and times on controllers are correct and ensure that equipment cannot operate when the building is



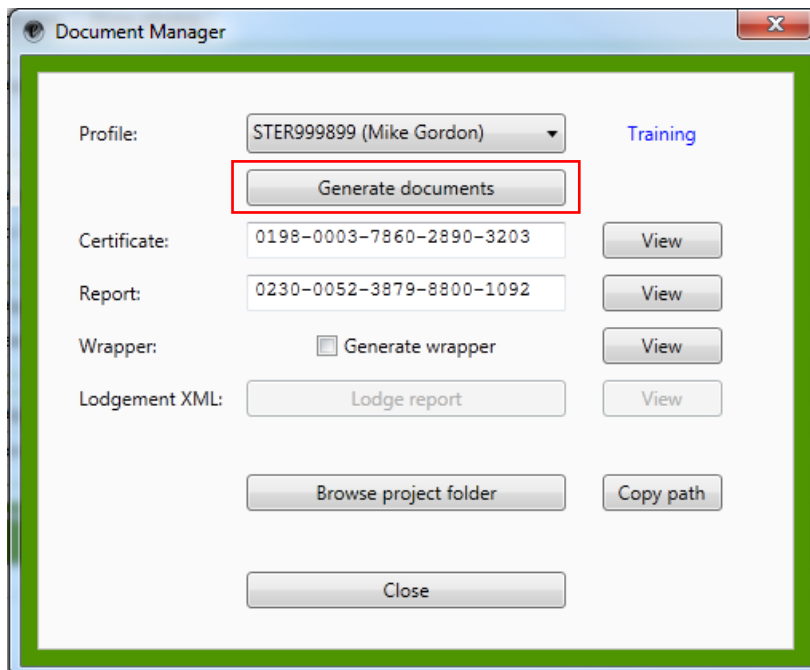
‘Set high priority’ moves any recommendation into the red section shown above. ‘Set medium priority’ moves any recommendation into the yellow section and ‘Set low priority’ moves the recommendation into the green section. You can also arrange the order within each section by clicking ‘Move up’ or ‘Move down’

Generating the Report and Certificate

To Create the Final Report and Certificate Click the ‘Documents’



button on the menu bar, and the following window will appear.



The Document Manager window contains the following fields and buttons:

- Profile: STER999899 (Mike Gordon) [dropdown menu]
- Training: [link]
- Generate documents: [button, highlighted with a red box]
- Certificate: 0198-0003-7860-2890-3203 [text field]
- View: [button]
- Report: 0230-0052-3879-8800-1092 [text field]
- View: [button]
- Wrapper: Generate wrapper [checkbox]
- View: [button]
- Lodgement XML: Lodge report [button]
- View: [button]
- Browse project folder: [button]
- Copy path: [button]
- Close: [button]

If you have created multiple profiles, please check that you have the correct profile for this report, this can be changed by using the drop down menu.

Click ‘Generate Documents’ to produce the watermarked Certificate and Report. Once these documents have been created the ‘View’ buttons will become available. Clicking on the appropriate button will launch a PDF

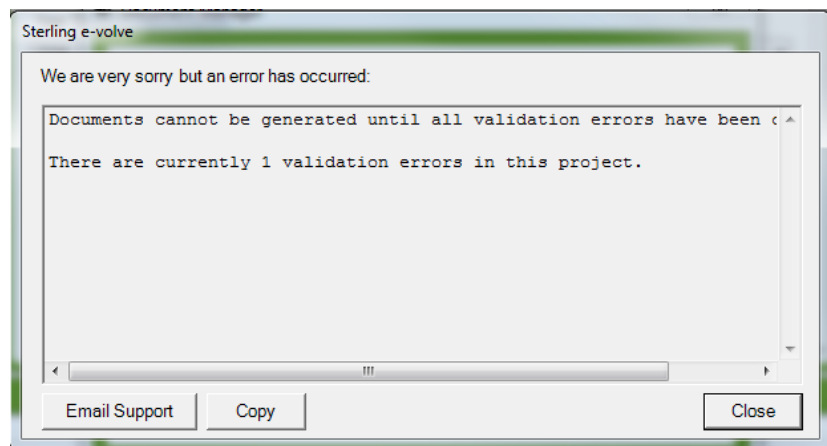
viewer containing the relevant document. It is good practice to read through the report and certificate to check that all the audit information is included.

Note: It is recommended that when creating the Certificate and Report for the first time ‘Generate wrapper’ should not be selected as this will require all photos to be uploaded. This feature is best used once you are happy with the content of the report.

If you need to make any changes to the report or certificate, close the Document Manager window and edit the report as required, once any changes have been made you will need to recreate the final documents by clicking on ‘Generate Documents’ again.

When you have checked the watermarked documents and are happy with the content, Click ‘Lodge Report’ to proceed with registering the Report and Certificate on the Central Register.

NOTE: It is not possible to create the Certificate and the Report unless the report you have written has been validated without error. If you receive this error please Click ‘OK’ and Click ‘Close’ on the Document Manager Window. From The report Main Menu Bar Click ‘Validate’ a list of report errors is now displaying in the bottom pane of the reporting window. Double Click the errors to be taken to the location of the error within the report.





Generating a Wrapped Report

It is assumed that you have already added photos, created the Enhanced Executive Summary and prioritised all of the Wrapper Key Recommendations. If you generate a wrapped report prior to lodgement, the Watermarked Certificate and Report will be included in the PDF. To include the un-watermarked Certificate and Report, you will need to lodge your report and then retrieve the documents from the Landmark Registry and place them in the Project folder. Project Folders can be found under \Documents\Sterling evolve\Projects*<Date Created> Project Name*

To generate the wrapper make sure that the 'Generate wrapper' has been ticked and then click 'Generate documents'.

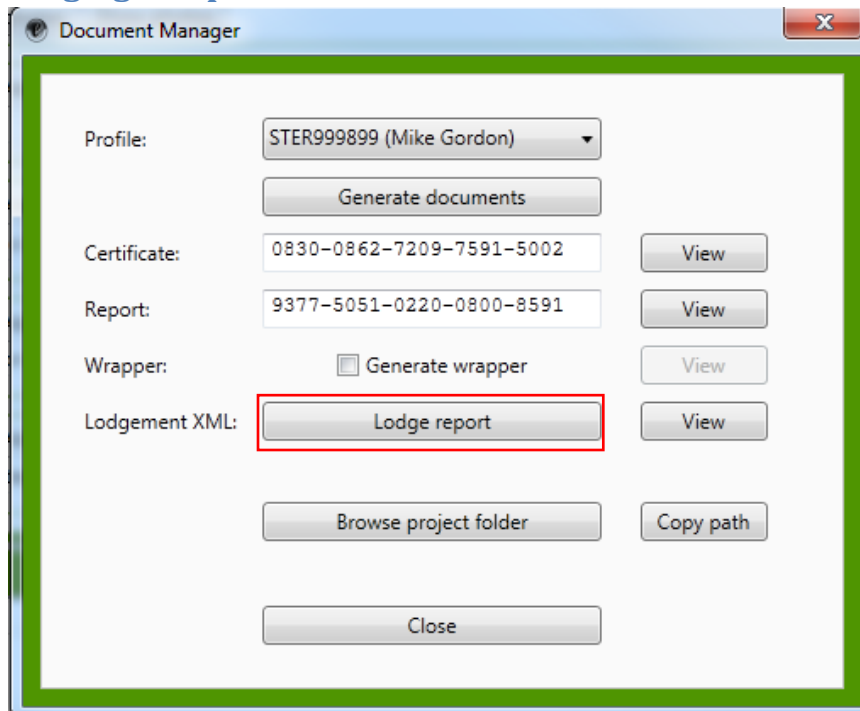
Once this process has been completed you can click on 'View' next to 'Generate wrapper' to see the final PDF. If you need access to the Project folder you can click 'Browse project folder' this will open a new Windows Explorer window showing the contents of the Project Directory.

Note: Wrapping a Report will upload all of the photos added to a report to the e-volve server to create the photo appendix, depending on the number of photos added this could take a few minutes to complete.

The screenshot shows a 'Document Manager' window with the following fields and buttons:

- Profile: STER999899 (Mike Gordon) [dropdown menu] Training
- Generate documents [button]
- Certificate: 0198-0003-7860-2890-3203 [text field] View [button]
- Report: 0230-0052-3879-8800-1092 [text field] View [button]
- Wrapper: Generate wrapper [checkbox/button] View [button]
- Lodgement XML: Lodge report [button] View [button]
- Browse project folder [button] Copy path [button]
- Close [button]

Lodging a Report and Certificate

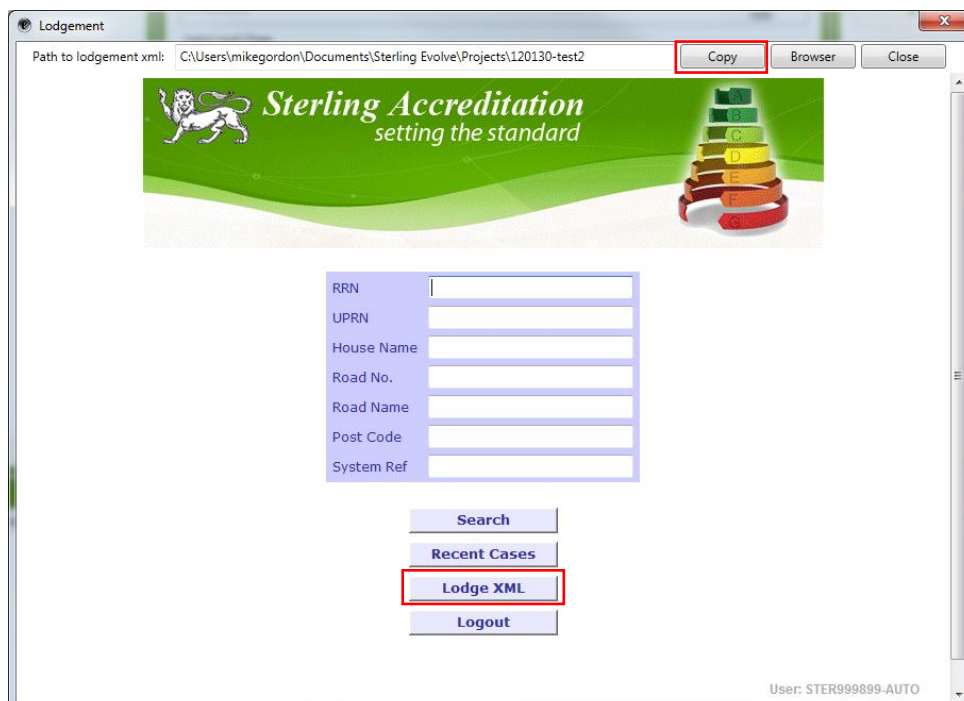


You are now ready to lodge a report onto the Central Register.

Click on 'Lodge Report' and depending on your Accreditation Scheme you will either need to Log into the CIBSE CASA Portal or Sterling Accredited Members will see the following screen.

NOTE: If you have created a Training Profile you cannot lodge a report to the central register so this button has been disabled.

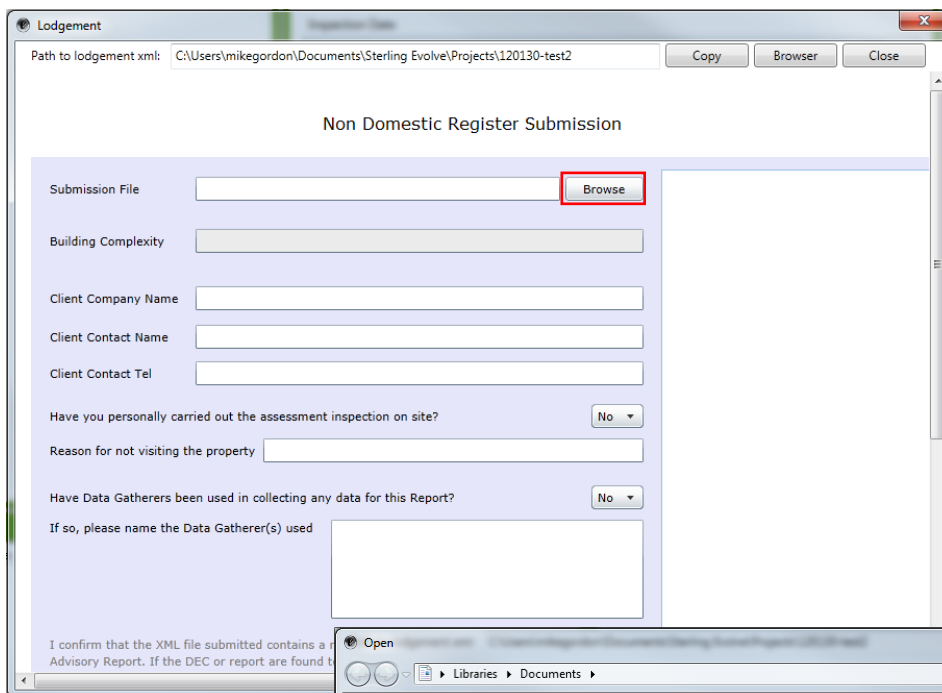
THIS SECTION APPLYS TO STERLING ACCREDITATION MEMBERS ONLY



In the top section of the window, the project path has been included this will save you from having to browse to find the XML file that you have just created.

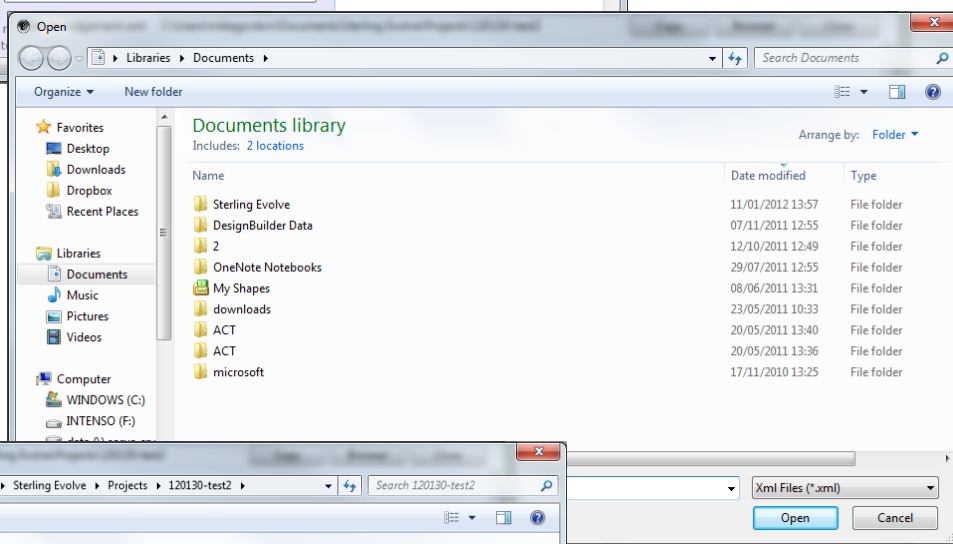
Click 'Copy' to take the Path from the Path bar into your clipboard.

Click on 'Lodge XML' file to proceed to Central Register Submission.



Click 'Browse'

Click your mouse into the Top menu bar which currently displays **>Libraries >Documents** and press 'CTRL V' to paste the path of the project file into the address bar and press 'Enter'.



You should notice that the content of the window has changed to the e-volve project directory associated with the report that you want to lodge. Select the XML file to lodge.

In this example the file named 0290-9900-0602-9310-1050 should be selected. (All lodgement files are creating with the RRN number as the name i.e. XXXX-XXXX-XXXX-XXXX-XXXX)

Click 'Open' to select this file for lodgement.

Please now completed the 3 questions about the Client and answer the questions referring to Data gatherers.

Once all these fields are complete click the 'Lodge Report' button at the bottom of the screen.

Your report is now being checked for errors. During this phase Sterling

checks that you have recorded Your Name, Trading Name, Trading Address and insurance correctly. If all of these match our membership database then your file will proceed to the Central Register. If the Site Address details match the UPRN you have entered then you should see an OK Success window appear confirming your lodgement to the central register.

Upload Site Notes

Once you have completed a successful lodgement Sterling Accreditation has provided a facility to allow you to upload your site notes and photos. These files will form a pack of information for our QA process.

Click **"Recent Cases"** to view your Lodgement History or search using one of the details requested. Click **"Documents"** and then Click **"Upload to Section"** to associate site notes and photos to your lodgement.

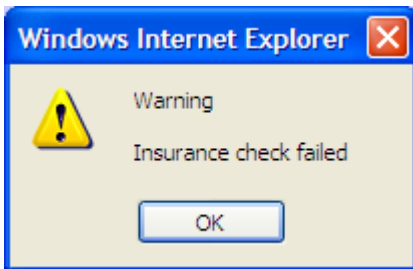
If you have installed Silverlight you should see the screen above. Click **"Choose File"** browse and **"Upload"** - **Note:** Max individual file size is 10MB **Note:** The following file types can be uploaded .txt, .rft, .doc, .docx, .jpg, .png, .pdf

Once you have finished lodging reports and uploading site notes and photos, click on **"Logout"** to **EXIT**

Common Errors during Lodgement

The following are some of the errors you may get if the report cannot be lodged successfully.

The errors below mean the trading name or trading name and address in the report do not match the details held on the Accreditation scheme.

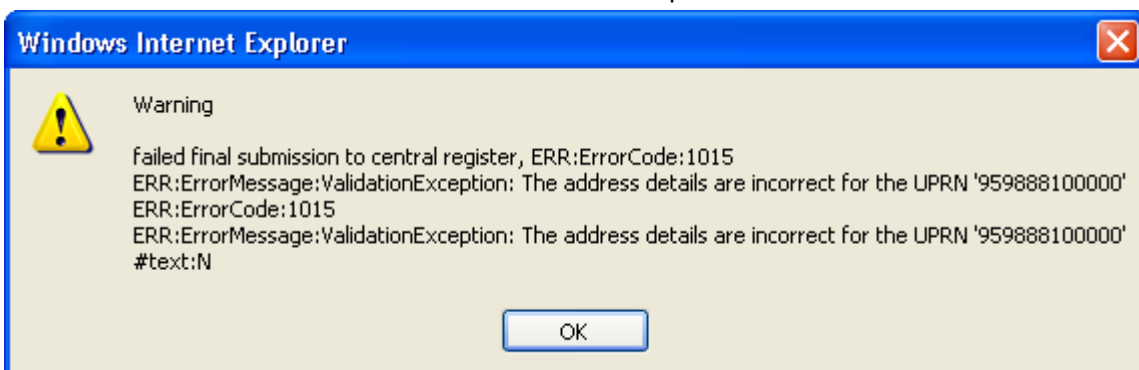


The insurance details in the report do not match the details held on the Accreditation scheme.

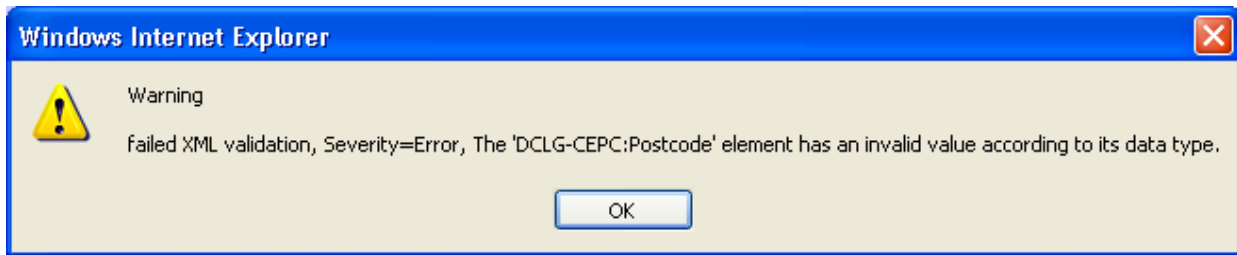


A report has already been lodged with this RRN; you will need to change the RRN in order to lodge the report again. The RRN is generated from the UPRN and the Inspection or Nominated Date. A change to the UPRN is normally not possible so you will need to change the Inspection or Nominated Date which will then generate a new RRN. If you require the original report to be hidden on the Landmark central database please email the Accreditation scheme.

The error below means the address is incorrect in the report.

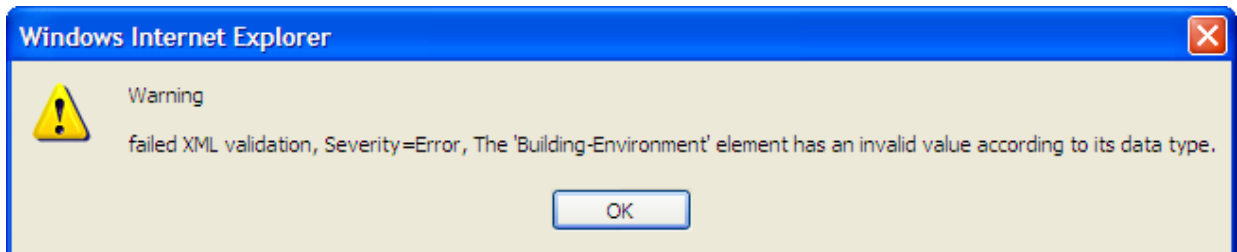


The error below means the postcode is incorrect in the report.

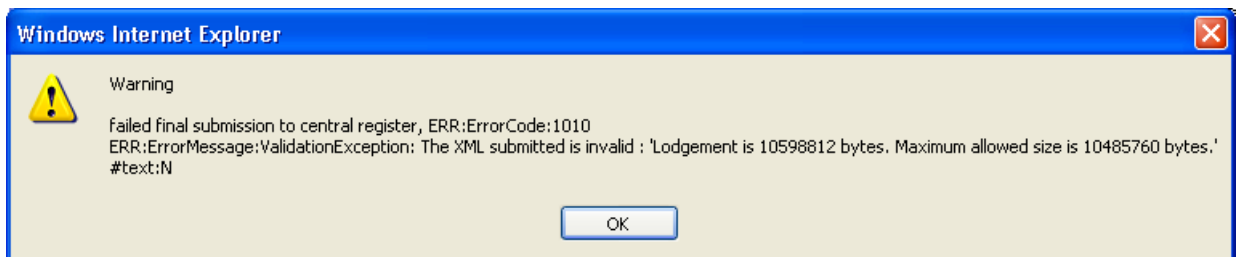


To see how the address should appear you can logon to www.ndepcregister.com and search for the address. Then correct the address in the report so it matches.

An error similar to the one below may appear if a field within the report is not correctly filled in; it will give an indication to the error. However, you may need to speak to your accreditation scheme or software supplier for advice on how to correct the error.



The error below means the XML you are trying lodge is too large, the maximum file size you can lodge is 10Mb, this is set by Landmark.



Please note: Once you have corrected any errors in an XML that has failed lodgement, you will need to press “F5” when on the lodgement screen to refresh the page before browsing to the corrected XML file.



Software Updates

Every time you open the e-volve reporting software, the system automatically checks for a new version of the software. If you are running an older version than is currently available, you'll be prompted to download the new version.

Technical Support

Sterling Accreditation Limited

Sterling Accreditation technical support helpline is open **Monday to Friday 09:00 to 17:00**. If you have any technical questions with the operation of this software please do not hesitate to contact us.

Technical Support Telephone: **0845 496 1215**

Online Technical Support: www.sterlingaccreditation.com/support/

Technical Support E-mail: support@sterlingaccreditation.com

When e-mailing queries please quote your membership number in the header with the type of support required (e.g. e-volve Support).

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CIBSE Certification Limited

CIBSE Certification technical support is available **Monday to Friday 09:00 to 17:00**.

If you have any technical questions with the operation of this software please do not hesitate to contact us.

Technical Support Telephone: **020 8772 3606 or 020 8772 3620**

Technical Support E-mail: epc@cibsecertification.org

Technical Support Website: <http://www.cibsecertification.org/support>

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