



DLMS® User Association www.dlms.com



How to Obtain IDIS Package 3 Certification

v2-04

1. Introduction

IDIS Package 3 Phase I Certification is now integrated into the DLMS UA Qualification Process. All **DLMS UA Members** have the ability to license the IDIS Package 3 specifications.

There are no changes to the certification process for IDIS Package 2, however IDIS Package 2 certifications will cease 6 months after the complete integration of the Package 3 Phase II certification process.

After this date, only re-certifications will be possible for IDIS Package 1 and IDIS Package 2.

1.1 Purpose

IDIS devices are tested for **Compliance** and **Compatibility** according to the process defined in the **DLMS UA Qualification Program**.

As a result, every certified IDIS device embedding IDIS Pack #3 Generic Companion Profile:

- Carries an IDIS Label which identifies the IDIS specification package 3:



- The Certificate clearly refers to:
 - The identification of the IDIS specification package.
 - The extensions to the minimal IDIS functionality implemented in this device (as described in the IDIS specification documents).
 - Identification of the Certificate of **Compliance** produced for this device.
 - The Applicant (the owner of the device IP) and the Recipient (the owner of the Certificate)
 - The type and model of the tested device.

1.2 Terms and Definitions

All the terms in bold used within this document are defined in the document [DLMS_UA_Definitions](#)

2. Procedure to obtain the IDIS Certificate

The procedure to obtain **IDIS Package 3** Certification includes the following phases:

1. **DLMS UA** Qualification for **Compliance**:

- Provides certification against the core DLMS specifications (Blue Book and Green Book) and act as a badge of excellence for data exchange interoperability.

This phase replace the Step 4. (DLMS Certification) in the procedure for Package 2 (see [How to get the IDIS test label \(package 2\)](#) on the IDIS Website).

2. **DLMS UA** Qualification for **Compatibility**:

Ensures certified devices are plug and play within a specific application irrelevant of the device manufacturer.

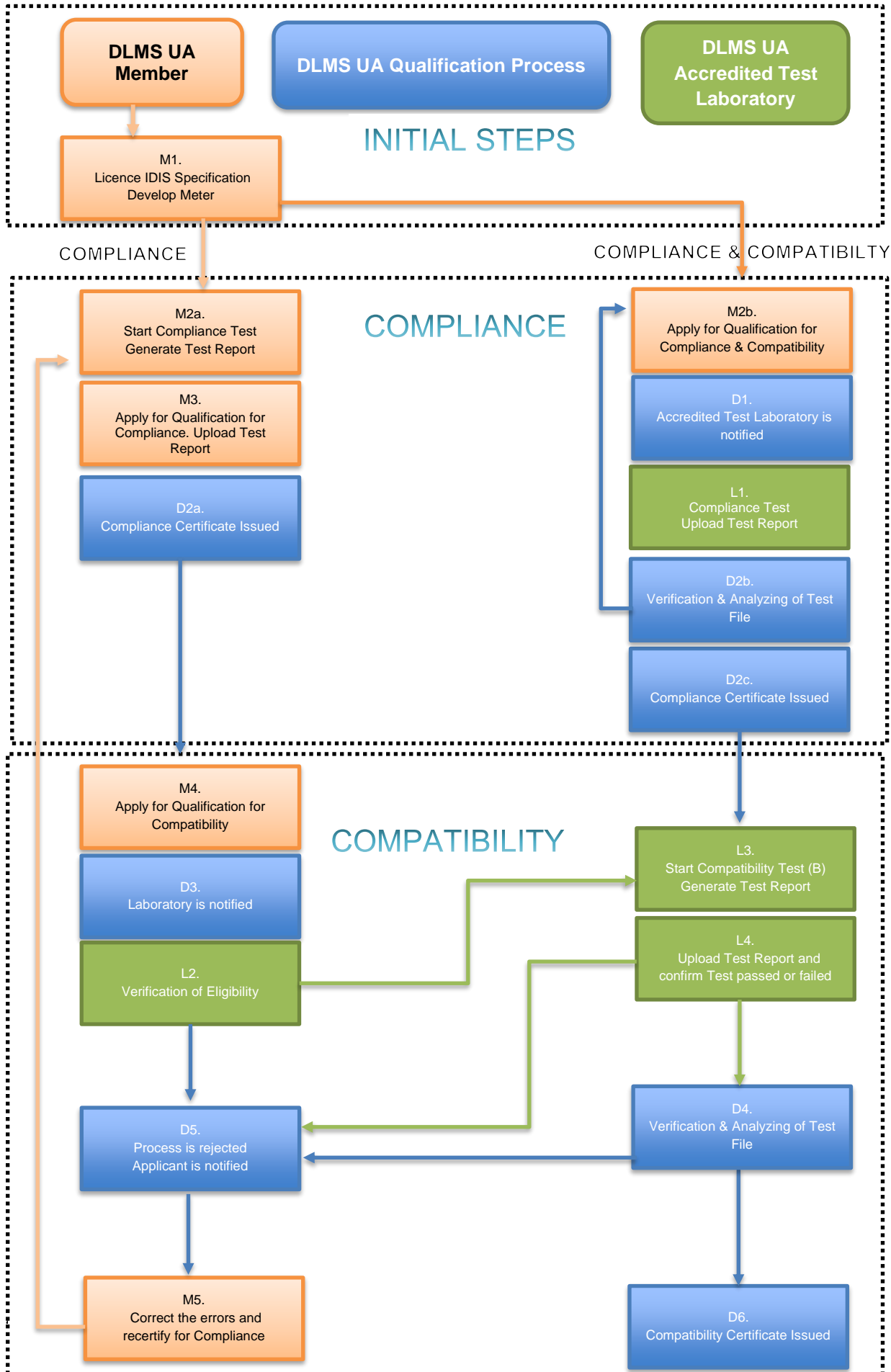
2.1 Phase I – IDIS Package #3 **Compatibility**:

Tests performed during this phase I correspond to tests performed in the Step 8. (Conformance Test) and 12. (FIT Test) in the procedure for Package 2 [How to get the IDIS test label \(package 2\)](#) in case of extension L & D.

2.2 Phase II - Third Party **DLMS UA Golden Device Compatibility** (To be released in a second phase by Q1 2024):

Tests performed during this phase II correspond to tests performed in step 8 (Conformance Test) and 12. (FIT Test) in the procedure for Package 2 [How to get the IDIS test label \(package 2\)](#) in case of extension M.

In each phase, a set of steps needs to be completed (see figure on next page):



3. Description of the Process:

3.1 Initial Steps:

Step M1: License the required IDIS Package 3 specification:

The request to license the IDIS Specification should be made from the IDIS pages on the **DLMS UA** website or through info@idis-association.com email address. This will involve agreeing to the license conditions and making payment to download the documents. Develop an IDIS meter according to the relevant IDIS Package 3 specifications.

You then have the ability to:

- apply for the Qualification for **Compliance** and then apply for the Qualification for **Compatibility**
- or
- apply for the Qualification for **Compliance & Compatibility** simultaneously.

These two possibilities are described in details in the next paragraph.

3.2 Qualification:

3.2.1 Compliance then Compatibility:

This is the case when a member carries out a self-test for **Compliance** and wishes to obtain a Certificate of **Compliance**. The product must contain all the features described the specifications of the IDIS Package 3.

1. Compliance :

Step M2a:

- ✓ Start Compliance test, generate test report.

Step M3:

- ✓ Go to [Qualification Program | dlms](#) and apply for a **DLMS UA Qualification** for **Compliance** for the product. This involves being a **DLMS UA** Member in good standing, having the right tools, and completing the **DLMS UA** Certification.
- ✓ Upload the self-test results via the online **DLMS UA Qualification Portal** to obtain a **DLMS UA** Qualification Certificate for **Compliance**. It is essential that the tool is configured correctly to test all mandatory services defined in the IDIS Package 3 specifications and that the product is tested in its native communication technology. The report obtained must contain the mandatory services stated in the **IDIS Package 3** specification.
- ✓ **DLMS UA** confirm the Application and verify the eligibility.
- ✓ **DLMS UA** confirm the eligibility and issue an invoice to the member covering:
 - Fee for **DLMS UA** assessment of product **Qualification** application eligibility and issuance of **DLMS UA Qualification Certificate** for **Compliance**.
 - Fee for the **DLMS UA** assessment and verification of the **Qualification** test results.

Step D2a:

- ✓ Once settlement done, **DLMS UA** confirm the payment and start analyse of the test result.

- ✓ If **DLMS UA** approve the test result then the Certificate is issued and **DLMS UA** Member is notified.
- ✓ If approval of the test result failed, then the Applicant is notified and invited to upload new test files.
- ✓ **DLMS UA** issue an invoice to the Applicant including fees for the **DLMS UA** assessment and verification of the **Qualification** test results.
- ✓ Once settlement done, **DLMS UA** confirm the payment and start analyse of the new test result.
- ✓ If **DLMS UA** approve the test result then the Certificate is issued and **DLMS UA** Member is notified else the Applicant has the possibility to upload again new test files.

2. Compatibility:

Prepare for the IDIS Package 3 Certification

- ✓ Applicants must have obtained the **IDIS Package 3** specification and ensure their implementation meets the required specification.
- ✓ **DLMS UA** strongly advises Members to ensure that the product has been tested using a pre-**Certification Test Run** at a **DLMS UA Accredited Test Laboratory** using the iCTT3 **DLMS UA Test Tool** OR has been tested using iDTT3 to ensure that there are no Firmware changes required after obtaining the Certificate of **Compliance**. If the Firmware ID changes in the time between obtaining a Certificate of **Compliance** and a Certificate of **Compatibility** for **IDIS Package 3**, the product will fail.

Step M4:

- ✓ Go to [Qualification Program | dlms](#) and apply for a **DLMS UA Qualification** for **Compatibility** against the **IDIS package 3** within the application form. The Certificate of **Compliance** obtained in Step D2a is used to assure that the application for Certification for **Compatibility** will apply on a product having the same serial number and firmware. **DLMS UA** is notified.
- ✓ **DLMS UA** confirm the Application and verify the eligibility.
- ✓ **DLMS UA** confirm the eligibility and issue an invoice to the member covering:

- Fee for **DLMS UA** assessment of product **Qualification** application eligibility and issuance of **DLMS UA Product Qualification Certificate for Compatibility**.
- Fee for the **DLMS UA** assessment and verification of the **Qualification** test results.
- ✓ The **DLMS UA Accredited Test Laboratory** is also notified.

Note: It is essential that the prerequisite Certificate of **Compliance** contains the mandatory services stated in the **IDIS Package 3** specification. If this has not been done, then the applicant should use the process below "**Compliance & Compatibility**" where both processes are carried out by a **DLMS UA Accredited Test Laboratory**.

Step D3:

- ✓ **DLMS UA** notifies the **DLMS UA Accredited Test Laboratory** and the **DLMS UA Member** on receipt of the payment of the application fees.
- ✓ The **DLMS UA Accredited Test Laboratory** arrange the delivery of the product with the **DLMS UA Member**.

Step L2:

- ✓ The **DLMS UA Accredited Test Laboratory** verifies the eligibility of the product received.
- ✓ If the eligibility is confirmed, the laboratory will conduct the required tests for **Compatibility** (go to Step L3 of of clause 3.2.2) else the **DLMS UA Accredited Test Laboratory** reject the process (then go to Step D5 of clause 3.2.2)

3.2.2 Compliance & Compatibility:

This is the case when the Member wishes to subcontract both the Certification for **Compliance** and the Certification for **Compatibility** to a **DLMS UA Accredited Test Laboratory**.

1. Compliance:

Step M2b:

- ✓ Go to [Qualification Program | dlms](#) and apply for a **DLMS UA** Qualification for **Compliance & Compatibility** for the product. This involves being a **DLMS UA Member** in good standing. **DLMS UA** is notified.
- ✓ **DLMS UA** confirm the Application and verify the eligibility.
- ✓ If Eligibility criteria have been fulfilled, **DLMS UA** will issue an invoice to the **DLMS UA Member**:
 - Fee for Application eligibility and issuance of a **DLMS UA** Product **Qualification** Certificate of **Compliance** and Certificate of **Compatibility**.
 - Fee for the **DLMS UA** assessment and verification of the Qualification test results.

Step D1: Contact with the **DLMS UA Accredited Test Laboratory**

- ✓ **DLMS UA** notifies the **DLMS UA Member** and the **DLMS UA Accredited Test Laboratory** on receipt of the payment of the application fees stated in the Step M2b.
- ✓ The **DLMS UA Test Laboratory** will contact you to arrange the testing schedule.

Step L1: Start compliance test and generate test report

- ✓ **DLMS UA** Compliance **Certification Test Run** fees are invoiced directly by the **DLMS UA Accredited Test Laboratory** to the **Applicant**. These fees are outlined in the **DLMS UA Internal Regulations** (Bylaws).
- ✓ Once settlement done, the **DLMS UA Accredited Test Laboratory** conducts the **Certification Test Run**.
- ✓ The **DLMS UA Accredited Test Laboratory** generates the report
- ✓ The **DLMS UA Accredited Test Laboratory** uploads the Test File online to the **DLMSUA Qualification Portal**. The **DLMS UA Member** is notified.
- ✓ Applicant acknowledge and accept the report upload by the **DLMS UA Accredited Test Laboratory**. **DLMS UA** is notified.

Step D2b:

- ✓ **DLMS UA** do the second level of eligibility. If OK then start the analyzing of the test file.

Step D2c:

- ✓ If all details are correct, and the Test File confirms that the test has indeed been passed, the certificate of **Compliance** is issued. The **DLMS UA Member** and the **DLMS UA Accredited Test Laboratory** are notified.
- ✓ If the approval of the Test File failed, **DLMS UA** notifies the **DLMS UA Accredited Test Laboratory**.

2. Compatibility:

Step L3:

- ✓ The **DLMS UA Accredited Test Laboratory** will issue and send an invoice for the Certification for Compatibility testing to the **DLMS UA** member.
- ✓ On receipt of payment, the **DLMS UA Accredited Test Laboratory** will reach out to arrange the testing schedule.
- ✓ The **DLMS UA Accredited Test Laboratory** carries out the test for **Compatibility**. This test is divided in two phases:
 - Phase I: In this phase, the **Compatibility** against the **IDIS Package 3** is carried out.
 - Phase II: This phase is done for the Multi-utility extension only, the communication with Sub-meters (**DLMS UA Golden Devices Compatibility**) is tested.
- ✓ The **DLMS UA Accredited Test Laboratory** conducts pre-**Certification Test Runs** and **Certification Test Runs** using the **DLMS UA Accredited Test Tool**.
- ✓ The following fees, defined in the **DLMS UA Internal Regulations (Bylaws)**, apply to the test runs and these fees are invoiced directly by the **DLMS UA Accredited Test Laboratory**:
 - Fees for **DLMS UA** compatibility pre-**Certification Test Run**
 - Fees for **DLMS UA** compatibility **Certification Test Run**
- ✓ Member will be notified by the **DLMS UA Accredited Test Laboratory** of the status of the testing.
- ✓ The **DLMS UA Accredited Test Laboratory** generates the report.

Step L4:

- ✓ The **DLMS UA Accredited Test Laboratory** have to confirm payment receipt from Applicant for the **DLMS UA** compatibility **Certification Test Run** and uploads the report via the online **DLMS UA Qualification Portal** and confirm test passed or failed.

Step D4:

DLMS UA do the second level of eligibility. If OK then start the analyzing of the test file else reject the Application.

Step D5 Rejected:

- ✓ The **DLMS UA Accredited Test Laboratory** has confirm that the test are failed, **DLMS UA** reject the process and the **DLMS UA Member** is notified.

Step D6:

- ✓ When the appropriate fees have been paid and the test results have been verified by **DLMS UA**, the certificate is issued, and the device is listed on the certified product list on the public pages of the **DLMS UA** website if authorized by the Applicant.
- ✓ If the approval of the Test File failed, **DLMS UA** notifies the **DLMS UA Accredited Test Laboratory**.

Step M5:

- ✓ The **DLMS UA Member** correct the errors and certify for Compliance.